



Australian Children's
Education & Care
Quality Authority



Progressing a national approach to the children's education and care workforce

Workforce report
November 2019



In March 2019, the Australian Children's Education and Care Quality Authority (ACECQA) was tasked with undertaking preliminary research and analysis of the children's education and care workforce on behalf of all Australian governments. This report was noted by Education Ministers in December 2019. It was therefore produced prior to the impact of the COVID-19 global pandemic.

Since then, COVID-19 has had a substantial impact on the children's education and care sector in Australia. This impact, as well as the associated restrictions resulting from it, has varied over time and across the country, and this may well continue to be the case.

This report is being released as a point in time analysis of the children's education and care workforce. While it does not take account of the impact of the COVID-19 global pandemic, its content remains relevant and of use when considering the children's education and care workforce.

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1. OVERVIEW

Children's education and care is an integral part of the Australian education system and sets the foundations for children's learning and development. It is also an area of significant government investment.

The National Quality Framework (NQF) is the national system for regulating education and care services, setting standards for safety and quality so that all children who attend approved long day care, preschool/kindergarten, outside school hours care and family day care services are supported to have access to high quality early learning and care.

There is growing evidence linking structural components, such as staff qualifications, to higher quality staff-child interactions, as well as to overall gains in child development, learning and well-being. A fundamental feature of the NQF is the requirement for service providers to retain a highly skilled workforce through mandatory standards for formal qualifications.

Consultations with the children's education and care sector over recent years have identified that there are persistent and increasingly pressing issues with the attraction, supply and retention of educators, in particular early childhood teachers (ECTs). There is also a need to effectively balance an ongoing focus on workforce quality with meeting the increasing demand for educators and teachers in a growing sector.

Conservative estimates predict the sector will require around 39,000 additional educators, including 9,000 additional ECTs, by 2023. This represents a 20% increase for the workforce over five years. In the context of declining enrolments in approved qualifications and a parallel focus on bolstering the supply of primary school teachers, the children's education and care sector faces significant and increasingly urgent workforce challenges.

While some employers have their own workforce strategies and several jurisdictions have initiated strategies to address local issues (for example, communications campaigns, professional development programs and scholarships), the issue of workforce supply and quality continues to be a national problem. One of the main concerns raised regularly by the sector is the absence of an overarching, national workforce strategy to provide solutions at a system level.

All stakeholders – employers, higher and vocational education and training institutes, national, state and territory regulatory bodies and authorities, educators, teachers and governments – have a role to play in advancing the goal of a sustainable highly skilled workforce. This can make for a very complex system, whereby effective administration and meaningful improvement requires the agreement and commitment of all stakeholders. The presence of, and in some instances reliance on, overseas trained educators and teachers in the children's education and care sector also adds complexity, drawing in issues and challenges around skilled migration.

Further adding complexity is the fact that the sector is large and heterogeneous. For example:

- there are around 7,700 long day care services, 4,500 outside school hours care services, 3,100 preschools/kindergartens, and 600 family day care services
- more than 80% of providers are approved to operate a single service
- one-third of services are operated by large providers (those approved to operate more than 25 services), while 37% of services are operated by single service providers
- while qualifications are a vital component of quality, there are no national qualification requirements for outside school hours care educators, with state and territory requirements varying significantly.

2. METHODOLOGY AND PURPOSE



In line with the priorities identified in Education Council's [Letter of Expectation](#) (December 2018 to June 2020), Australian governments requested ACECQA undertake preliminary research and analysis to progress a national approach to supporting children's education and care service providers to attract, develop and retain a high quality workforce.

This report summarises the findings from work conducted between June and September 2019, including:

- analysis of available workforce data
- research of past and current Australian and international workforce related initiatives and approaches
- an environmental scan of current and future policies and priorities relevant to the children's education and care workforce
- interviews with 40 sector stakeholders, including employers, peak associations, state and territory teacher regulatory authorities, higher education institutes and governments
- a sector survey completed by more than 1,600 children's education and care educators and teachers
- a national workforce forum attended by 80 sector stakeholders.

The national workforce forum in September 2019 offered the opportunity to test and validate preliminary findings and emerging themes from this work. Feedback from the forum has been incorporated into this final report.

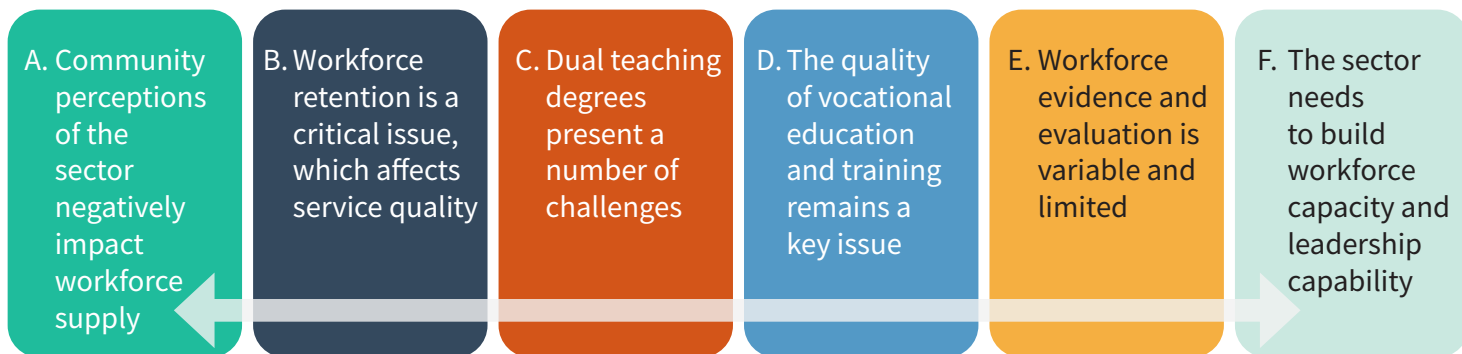
This report intends to provide a comprehensive evidence base to enable governments to make decisions about policies, priorities and initiatives relating to the children's education and care sector workforce.

3. KEY FINDINGS

Attracting, developing and retaining a high quality children's education and care workforce continues to be a significant and increasing challenge across the sector. The lack of a national approach to addressing this challenge is a key concern raised by many stakeholders.

Themes

Six themes have been identified through this project, as below:



A. Community perceptions of the sector negatively impact workforce supply

- i. The wider community understanding and value (or lack thereof) of children's education and care negatively impacts on the supply of prospective educators and teachers
- ii. The national discourse around the children's education and care sector is often negative, centred largely on poor pay, conditions and career prospects
- iii. Targeted strategies are required to overcome barriers to entry for certain groups of prospective educators and teachers (e.g. Aboriginal and Torres Strait Islander educators, and regional and remote communities)
- iv. Workforce diversity is important, both to raise the professional profile of the sector and to deliver quality outcomes for all children.

B. Workforce retention is a critical issue, which affects service quality

- i. Comparatively lower pay and less favourable conditions are contributing to attrition to other sectors, notably the school sector. However, base remuneration alone is not the solution, with professional identity and career progression also key elements to consider
- ii. The ongoing administrative cost of recruitment, induction and training, exacerbated by high staff turnover, is a barrier to employers investing in professional development
- iii. Continuity of educators particularly affects the quality of educational programs and practice, and relationships with children and families
- iv. There is a lack of information about clear, attainable career pathways for both current and prospective staff
- v. Many educators feel stressed and are concerned about wellbeing and burnout
- vi. Teacher registration is lifting the professional identity of early childhood teachers, however the associated requirements are not nationally consistent and the supporting frameworks are not inclusive. Overseas trained early childhood teachers often need to negotiate three different approval processes before they are able to work.

C. Dual teaching degrees present a number of challenges

- i. Existing approval and accreditation processes for teaching degrees are inconsistent and, at times, school centric
- ii. The majority of newly graduated dual qualified teachers (i.e. early childhood and primary) intend to seek employment in schools
- iii. There are key structural differences, such as pay and conditions, and infrastructure and support, between the children's education and care sector and the school sector, and this impacts the former's ability to retain high quality teachers
- iv. Any workforce shortages in the primary school sector exacerbates the challenges for the early childhood sector in attracting and retaining new graduates. Similarly, any workforce initiatives and incentives in the primary school sector also exacerbates those challenges.

D. The quality of vocational education and training remains a key issue

- i. The qualification development and approval process is complex, infrequent and involves many different stakeholders
- ii. Despite a number of reviews and reforms, the quality of vocational education remains variable and many graduates have unrealistic expectations and are not 'job ready'
- iii. There are upcoming opportunities to influence supply and increase quality on a national level through the initiatives announced as part of the Australian Government's [*Delivering Skills for Today and Tomorrow*](#) package.

E. Workforce evidence and evaluation is variable and limited

- i. Available data suggest that demand for qualified educators and teachers may outweigh supply within the next five years
- ii. Enrolments and completions of approved qualifications demonstrate overall growth in student and graduate numbers since the commencement of the NQF, however more recent decreases suggest an impending pipeline issue
- iii. Disparate and often incomplete collections of data across government bodies and authorities makes comprehensive, evidence-based decision-making difficult
- iv. There is limited information about the uptake and effectiveness of previous workforce related initiatives. Employers are also largely unaware of government initiatives and/or find the administrative burden of accessing them outweighs the benefit.

F. The sector needs to build workforce capacity and leadership capability

- i. Educators and teachers are impacted most by the culture and relationships at the local service level, and feel valued when their employers invest in their professional development and career growth
- ii. Early childhood teachers, particularly those in regional and remote areas, and those working as the sole teacher at a service, often feel isolated and need access to mentoring and professional networks in order to enhance their practice
- iii. There remains a sector expectation of government investment in professional development and training, rather than a model of co-contribution.

Specific challenges

In addition to the six themes, this project has identified three specific challenges for different parts of the children's education and care sector.

1. Single service providers

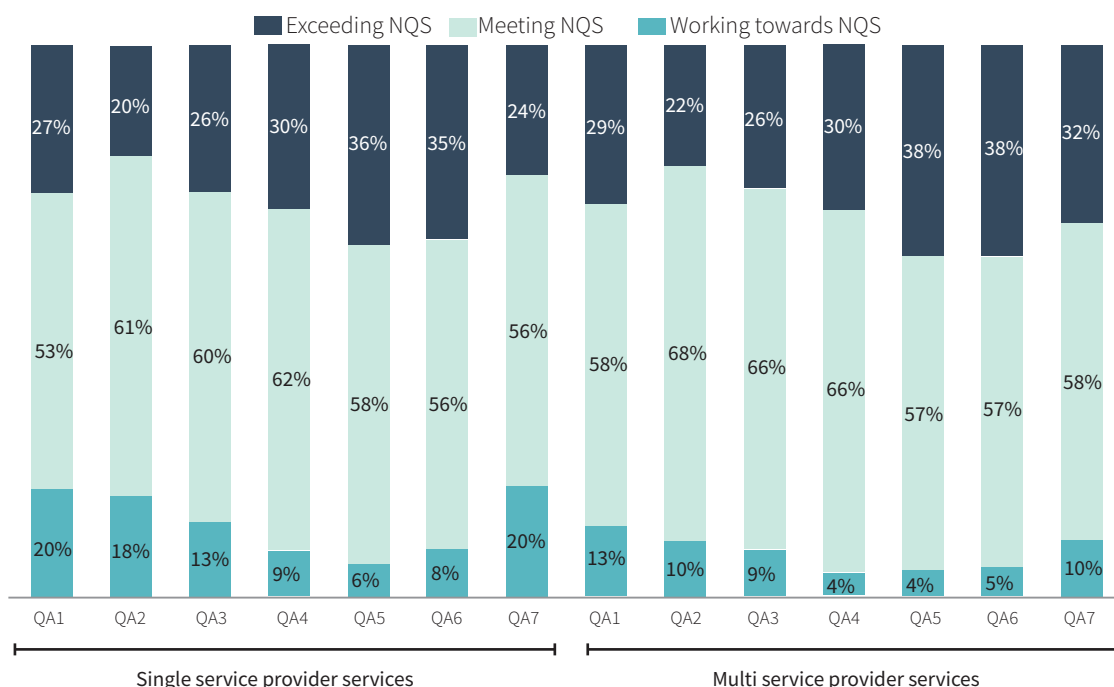
Under the NQF, there are more than 7,000 providers approved to operate children's education and care services, 82% of which operate a single children's education and care service.

Single service providers operate more than a third (37%) of all approved services. At the other end of the spectrum, large providers (those that operate 25 or more services) operate a third (33%) of services.

Unlike large providers, single service providers typically do not have sophisticated recruitment and retention processes and procedures in place, nor are they easily able to provide comprehensive support, and professional learning and development opportunities to their educators and teachers. In contrast, a number of large providers leverage economies of scale and undertake national and international recruitment campaigns. They are also able to offer extensive professional development and support, often through eLearning and other accessible and flexible technology.

Under the quality assessment and rating system, there is a notable difference in quality between services operated by single service providers and those operated by multi service providers. More than a quarter (26%) of single service provider services are rated Working Towards National Quality Standard (NQS), compared to 17% of multi service provider services.

Similar differences exist across all seven quality areas of the NQS, most notably for governance and leadership (QA7), children's health and safety (QA2), and educational program and practice (QA1), where the proportion of single service provider services rated Working Towards NQS is at least seven percentage points higher.



Source: ACECQA, NQF Snapshot as of 30 September 2019.

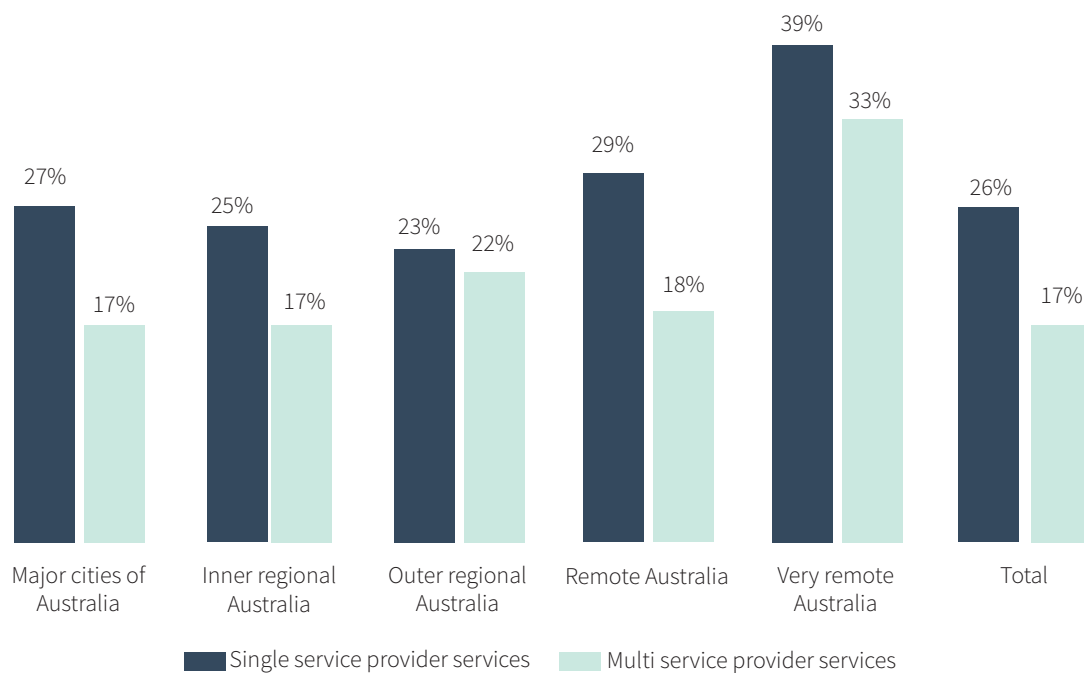
At the quality element level, the largest differences (where the proportion of single service provider services not meeting the element is at least five percentage points higher) are for:

- development of professionals (7.2.3)
- management systems (7.1.2)
- assessment and planning cycle (1.3.1)
- critical reflection (1.3.2)
- health practices and procedures (2.1.2)
- incident and emergency management (2.2.2)
- educational leadership (7.2.2)
- continuous improvement (7.2.1).

A number of the above elements are particularly relevant to workforce issues and challenges, including staff evaluation and learning and development plans (assessed as part of element 7.2.3), and effective service management and operation (assessed as part of element 7.1.2).

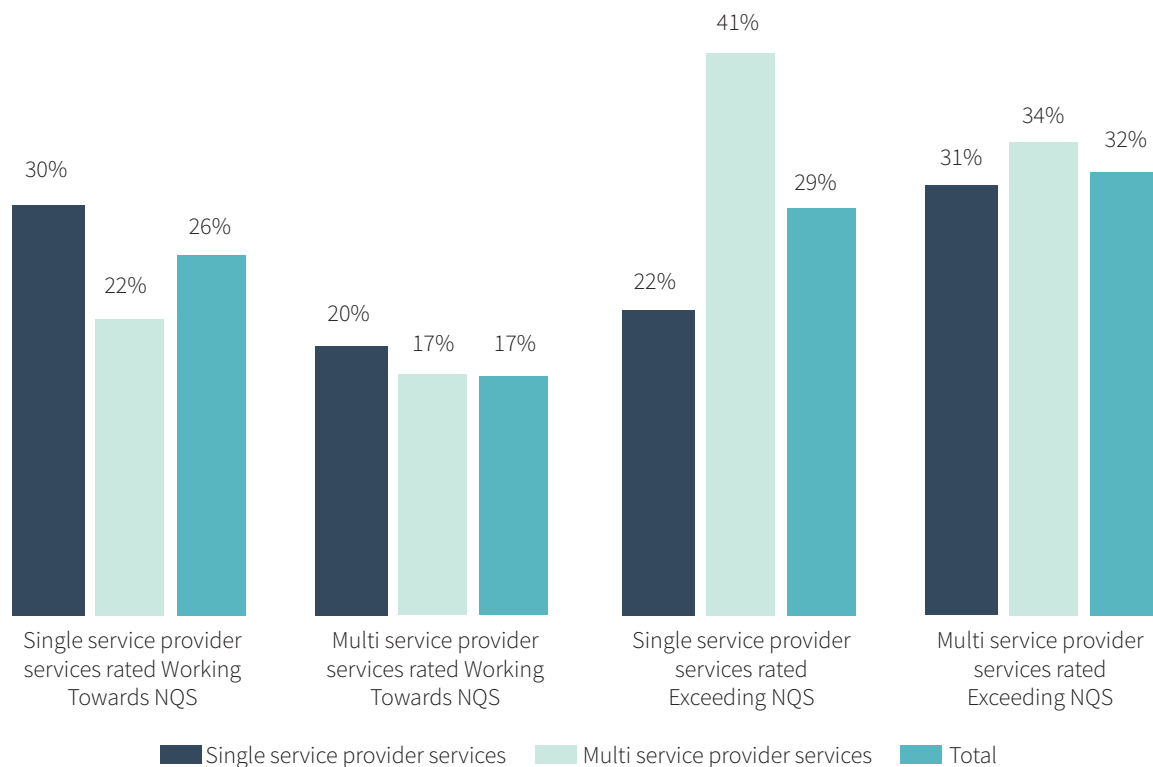
Examining quality ratings by geographic and socio-economic area (using the ARIA+ and SEIFA classifications) also highlights notable differences in quality between services operated by single service providers and those operated by multi service providers.

Proportion of services rated Working Towards NQS



Source: ACECQA, NQF Snapshot as of 30 September 2019.

While there is a clear pattern of single service provider services performing less well than multi service provider services, one notable exception is the high proportion of single service provider services located in the least disadvantaged SEIFA quintile that are rated Exceeding NQS. Some of these services may offer high-end children's education and care, tailored to their local markets.



Source: ACECQA, NQF Snapshot as of 30 September 2019.

2. Early childhood teacher related requirements and provisions

While the NQF has progressively introduced higher staffing and qualification requirements, transitional and saving provisions are included in the Education and Care Services National Regulations to recognise the different jurisdictional starting points, as well as the different challenges faced in meeting the higher requirements.

In some jurisdictions, transitional provisions have been extended multiple times in response to ongoing workforce challenges and concerns. In June 2019, Education Ministers agreed to extend a number of transitional provisions that relate to early childhood teachers. However, whether the provisions were extended and for how long varied by jurisdiction.

For example, Regulation 242 (which allows an individual who is half way through their early childhood teaching degree, or is enrolled in such a degree and holds an approved diploma level qualification, to be taken to be an early childhood teacher) was extended until 31 December 2021 in the ACT, Queensland, South Australia and Tasmania, and until 31 December 2023 in the Northern Territory and Western Australia. In contrast, this regulation has already expired in Victoria and only has very limited application in NSW until 31 December 2021.

Having this level of variation in requirements and provisions for early childhood teachers presents significant challenges for service providers operating across jurisdictions.

The general complexity of qualification requirements under the NQF, as well as how the national requirements interact with jurisdiction-specific requirements, can also present a significant challenge for a sizeable proportion of service providers.

An overview of three early childhood teacher related requirements and provisions is below.

Regulation	Summary
135 (ECT illness or absence)	<p>An early childhood teacher absent due to short-term illness or leave can be replaced by a diploma qualified staff member or a primary school teacher, but not if the early childhood teacher is employed on a full-time or full-time equivalent basis.</p> <p>Regulation 135 does not apply in NSW.</p> <p>In the ACT, Queensland, Tasmania and Western Australia, resignation is also an acceptable reason for short-term absence.</p>
242 (Persons taken to be ECTs)	<p>A person is taken to be an early childhood teacher if they are 'actively working towards' an approved ECT qualification and have completed at least half of the qualification, or hold an approved diploma level qualification.</p> <p>Regulation 242 does not apply in Victoria, and only applies in NSW for services educating and caring for fewer than 30 children preschool age or under.</p>
272 (ECTs)	<p>This regulation only applies in NSW.</p> <p>Unlike long day care services and preschools/kindergartens in the rest of the country, which are all currently required to have an ECT and will be required to have two ECTs (or one ECT and one 'suitably qualified person') from 2020 if they are educating and caring for 60 or more children, services in NSW may currently be required to have up to four ECTs depending on the number of children being educated and cared for.</p>

3. Skilled migration

The landscape becomes even more complex for overseas trained educators and teachers seeking to work in NQF approved services.

These individuals may well be required to undergo multiple assessment and approval processes.

For example, an overseas trained early childhood teacher may need to undergo three different assessment processes:

- An application to the Australian Institute for Teaching and School Leadership (AITSL) for skilled migration as an Early Childhood (Pre-Primary School) Teacher
- An application to the state and territory teacher regulatory authority for teacher registration (mandatory registration for early childhood teachers is currently in place in New South Wales, Victoria, Western Australia and South Australia)
- An application to ACECQA for assessment of equivalence as an early childhood teacher under the NQF.

For immigration purposes, there are currently three children's education and care occupations nominated as eligible skilled occupations on the *Medium and Long-term Strategic Skills List* (MLTSSL), the *Regional Occupation List* (ROL) and the *Regional Sponsored Migration Scheme* (RSMS) ROL List.

Occupation	List	Assessing authority	Eligible visas
Early Childhood (Pre-primary School) Teacher (ANZSCO Code 241111)	MLTSSL	AITSL	186 - Employer Nomination Scheme visa (subclass 186) 189 - Skilled Independent (subclass 189) - Points-Tested 190 - Skilled Nominated (subclass 190) 407 - Training visa (subclass 407) 485 - Temporary Graduate (subclass 485) - Graduate Work 489 - Skilled Regional (Provisional) visa (subclass 489) - Family sponsored 489 - Skilled Regional (Provisional) visa (subclass 489) - State or Territory nominated 482 - Temporary Skill Shortage (subclass 482) – Medium Term Stream 187 - Regional Sponsor Migration Scheme (subclass 187)
Child Care Centre Manager (ANZSCO Code 134111)	MLTSSL	Trades Recognition Australia (TRA)	186 - Employer Nomination Scheme visa (subclass 186) 189 - Skilled Independent (subclass 189) - Points-Tested 190 - Skilled Nominated (subclass 190) 407 - Training visa (subclass 407) 485 - Temporary Graduate (subclass 485) - Graduate Work 489 - Skilled Regional (Provisional) visa (subclass 489) - Family sponsored 489 - Skilled Regional (Provisional) visa (subclass 489) - State or Territory nominated 482 - Temporary Skill Shortage (subclass 482) – Medium Term Stream 187 - Regional Sponsor Migration Scheme (subclass 187)
Child Care Worker (Group Leader only) (ANZSCO Code 421111)	RSMS ROL		187 - Regional Sponsor Migration Scheme (subclass 187)

AITSL is the approved assessing authority for all school teacher occupations, including the Early Childhood (Pre-primary School) Teacher occupation.

In 2018, AITSL received 1,337 applications for skills assessment, of which just over one third (34%) were early childhood (pre-primary school) teachers. Australia, United Kingdom, South Africa, Singapore, and India were the top five countries in which the initial teacher education programs were completed by applicants.

The majority of skills assessments undertaken by AITSL result in successful outcomes. In 2018, of the 1,323 assessments completed, 1,186 were suitable and 100 were assessed as unsuitable (37 were not assessed due to either incomplete or false and misleading documentation). Of the unsuccessful applications, roughly one quarter related to early childhood (pre-primary school) teacher assessments.

While the partner bodies have made progress in more closely aligning their respective qualification assessment processes and requirements, differences remain between AITSL, state and territory teacher regulatory authorities and ACECQA.

A key point of difference is the fact that ACECQA will consider high quality three year qualifications from overseas trained early childhood teachers while AITSL and the Teacher Registration Board of Western Australia and South Australia will only consider four year qualifications. It is important to note that both the NSW Education Standards Authority and the Victorian Institute of Teaching accept all ACECQA approved qualifications for the purposes of teacher registration/accreditation.

In October 2019, ACECQA was approved as the assessing authority for the Child Care Centre Manager and Child Care Worker (Group Leader only) occupations, with this change coming into effect from 16 November 2019. There is very limited data available about the volume of individuals seeking migration under these occupations. Current estimates indicate around 100 applications annually.

ACECQA's assessment standards for the two occupations will be aligned to NQF qualification requirements.

The Department of Employment, Skills, Small and Family Business (now Department of Education, Skills and Employment) regularly reviews the skilled migration occupation lists to ensure they are responsive to genuine skill needs across Australia.

On 4 September 2019, the Department commenced a review of the skilled migration occupation lists. The formal submission period is expected to run between December 2019 and February 2020, with updates to the lists scheduled to be announced in March 2020.

4. OPPORTUNITIES



The themes and challenges identified as part of this project, which have been discussed with a broad range of sector stakeholders, offer a number of important and timely opportunities.

Foremost amongst these is the overarching opportunity for a new national workforce strategy. All sector stakeholders consulted as part of this project supported the development of a new strategy, with the previous national strategy having expired in 2016.

A ten-year national children's education and care sector workforce strategy (2020-2029), to be overseen by a cross sector steering group

There is strong evidence in support of, and stakeholder appetite for, a jointly designed and owned national workforce strategy.

Workforce issues and challenges are complex and entrenched, and national leadership is needed to provide strategic, comprehensive and impactful solutions.

Given that all stakeholders have a role to play and interlinking responsibilities in advancing the goal of a sustainable highly skilled workforce through actions focussed on improving the attraction, retention and quality of educators and teachers, a new national workforce strategy would most appropriately be developed through consultation and co-design with governments, teacher regulatory authorities, employers, peak bodies and associations, higher education institutes, registered training organisations, and educators and teachers.

A national strategy should be appropriately ambitious and cover a sufficient timeframe to address workforce issues and challenges. A ten-year strategy would allow for meaningful short, medium and long term progress, with all stakeholders being responsible for delivery of identified aspects.

There is a clear link between the children's education and care sector's ability to attract high quality educators and teachers, and broader community perceptions of the sector and its value.

A national communications campaign promoting careers in children's education and care, with complementary strategies implemented at state/territory and local levels, was advocated by a broad cross section of stakeholders interviewed as part of this project.

The campaign's objectives could be to shift public opinion, promote workforce diversity, and appeal directly to young high achievers seeking a rewarding career.

The key messages of the campaign could also be incorporated into a new national workforce strategy.

Recent reforms in the vocational education and training sector, particularly the establishment of the National Careers Institute and National Careers Ambassador, also provide opportunities to access and inform broader community partners, such as careers advisors, job service providers and registered training organisations, about careers in the children's education and care sector.

There are a number of opportunities that could be progressed as part of, or in tandem with, a national workforce strategy. The below opportunities relate to one or more of the themes and challenges identified as part of this project, with some also relating to existing and ongoing work.

Supporting single service providers

Given the makeup of the children's education and care sector, there needs to be consideration about how small, stand-alone, single service providers can be supported to recruit, retain and develop their workforce, particularly when they face additional challenges because they are located in regional and remote communities.

Initiatives such as the [Regional Early Education Development](#) project in Western Australia and the [Lady Gowrie Early Childhood Management Service](#) in Tasmania provide models for sector support similar to the economies of scale afforded to large providers. There is the opportunity to learn from these initiatives, share successful approaches, and consider how educators and teachers can be attracted and supported to work in these communities.

Opportunity: *A national professional development framework, focussed on increasing the workforce capacity and leadership capability of small providers, particularly those operating in regional and remote areas*

Raising awareness of workforce related initiatives and incentives

A strong message that emerged from stakeholder consultation was that children's education and care service providers were often unaware or confused by the various government workforce related initiatives, incentives and opportunities available at both the national and jurisdiction level.

Several stakeholders proposed a 'one stop shop' for finding out information and applying for such initiatives and incentives.

Opportunity: *A single national point of contact for service providers, educators and early childhood teachers to access information about workforce related initiatives and incentives*

Improving consistency and reducing complexity

While the NQF provides a coherent national system with jurisdictional differences having been progressively reduced since its introduction on 1 January 2012, specific instances of difference remain, particularly in relation to the workforce.

The most stark difference exists in the outside school hours care sector where jurisdictional qualification requirements vary significantly. This makes it difficult for any workforce development strategies to be implemented at a national level for this important and growing sector.

Another key difference relates to the early childhood teacher requirements and provisions in force in each jurisdiction. This makes it difficult and complex for state and territory regulatory authority authorised officers to monitor and enforce compliance with the relevant requirements and provisions, as well as for children's education and care service providers to understand and ensure that they are complying with the requirements and provisions.

This challenge is particularly acute for multi-jurisdictional providers, who are required to understand and keep track of different, evolving jurisdiction specific requirements and provisions.

Opportunity: *A review of staffing and qualification requirements under the National Quality Framework, with a focus on early childhood teachers and educators working in outside school hours care to improve consistency and reduce complexity*

Supporting professional identity

The '[One Teaching Profession](#)' report provides ample evidence for the importance of a nationally consistent teacher regulatory system, inclusive of early childhood teachers. Current jurisdictional arrangements for the registration/accreditation of early childhood teachers are inconsistent and not comprehensive.

There is also overlap and duplication within regulatory frameworks. Overseas trained ECTs are required to apply to ACECQA for approval to work in approved services and to state and territory teacher regulatory authorities for teacher registration/accreditation (in the jurisdictions that have mandatory ECT registration/accreditation). They may also be required to apply to AITSL for skilled migration as an early child (pre-primary school) teacher.

These processes can be onerous and result in different outcomes, notably in states and territories that require ECTs to hold a four year initial teacher education degree. Such variation between jurisdictions is also arguably challenging in the context of the Mutual Recognition Act.

In addition to issues around duplication and inconsistency, early childhood teachers who are required to be registered/accredited are also expected to maintain their registration/accreditation and progress their teaching career with reference to the [Australian Professional Standards for Teachers](#) (APST). The APST were developed before the commencement of the NQF and at a time when only one jurisdiction required ECT registration so they are framed firmly in terms of primary and secondary teaching, with teachers in the school system the intended audience.

Opportunity: *A mandatory and nationally consistent model for early childhood teacher registration, which also streamlines existing application and approval processes for overseas trained early childhood teachers, and ensures that the Australian Professional Standards for Teachers are relevant and applicable to early childhood teachers*

Improving the national workforce evidence base

A significant challenge and barrier to decision making is the disparate and incomplete workforce data at a national level. This is further exacerbated by varied methods of data collection and analysis. As a result, accurate and contemporary data about the children's education and care workforce is rarely available to influence decision making. For example, conservative estimates of workforce growth are currently used for skilled migration and immigration purposes.

There are also challenges with the consistency and detail of data collected as part of the [Early Childhood Education and Care National Workforce Census](#). For example, the Census is unable to provide an accurate number of how many individuals are working as ECTs and the impact and uptake of transitional staffing provisions under the NQF. Furthermore, data collection to inform [national skill shortage areas](#), and subsequent migration policy, often does not appear to be consistent with data and feedback provided by jurisdictions and sector stakeholders.

There is a need to review how workforce data can be better collected, stored and shared across all stakeholders in order to maximise the benefits of a robust, comprehensive evidence base. This review should also consider the value and need for multiple workforce data collections to be undertaken by governments, with the associated burden and duplication this can create, and the overall benefits and savings that could be gained by pooling resources and streamlining efforts.

Opportunity: *A single, comprehensive national census of the children's education and care workforce undertaken every two years, informed and overseen by a cross sector steering group, with access to the data appropriately shared across stakeholders*

5. WORKFORCE SNAPSHOT

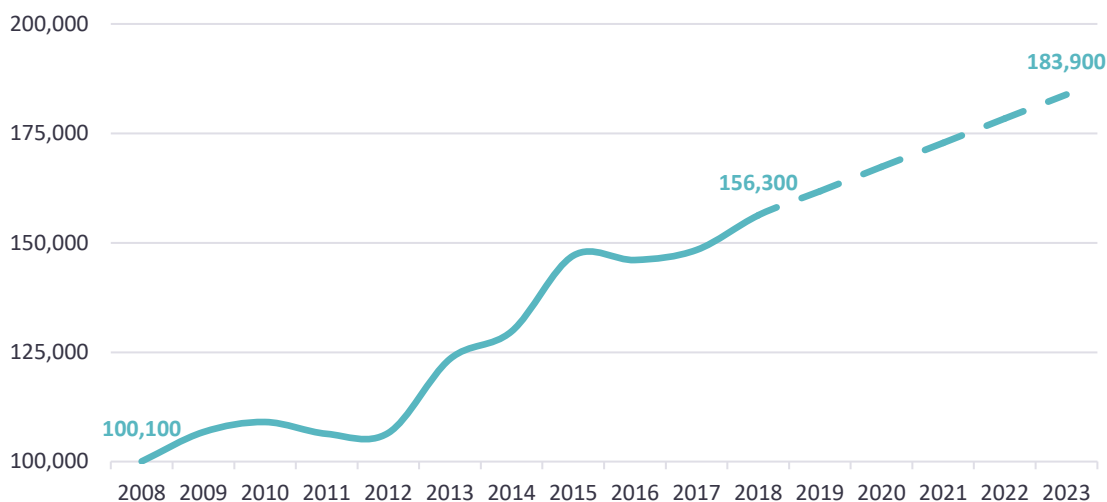


As part of this project, ACECQA has analysed a broad range of data relating to the children's education and care workforce. The below section summarises key aspects of this analysis.

Future demand

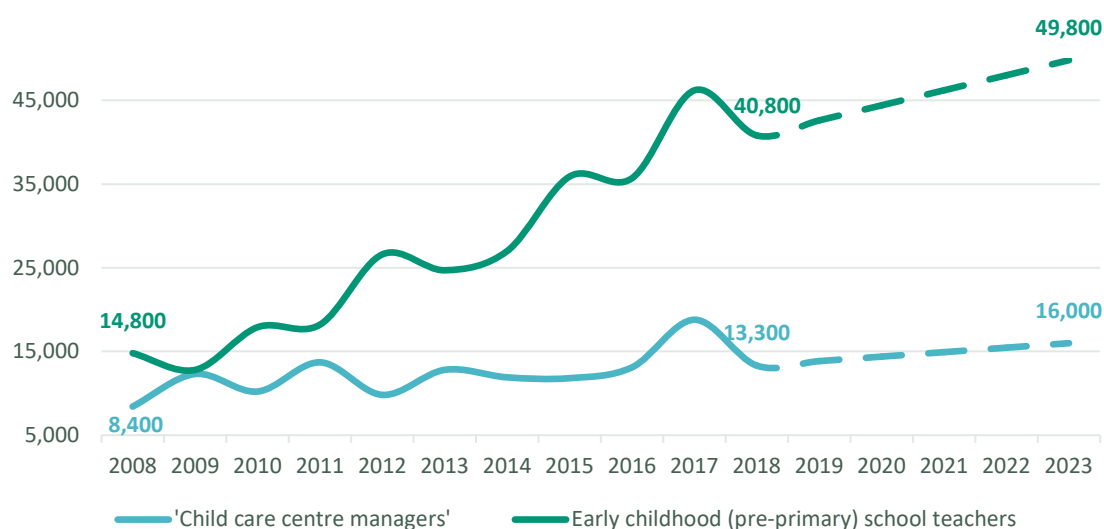
The Department of Jobs and Small Business (now Department of Education, Skills and Employment) [Labour Market Employment Projections](#) predict the sector will require around 39,000 additional educators, including 9,000 additional ECTs, by 2023. This represents a 20% increase for the workforce over five years (May 2018 – May 2023).

Labour force estimates to 2023



Source: Australian Government Department of Jobs and Small Business: Occupation trend data to May 2018, Occupation projections to 2023.

Labour force estimates to 2023



Source: Australian Government Department of Jobs and Small Business: Occupation trend data to May 2018, Occupation projections to 2023.

It is important to note that these projected estimates do not necessarily take into account increased workforce demand resulting from any regulatory or government policy / funding changes between May 2018 and May 2023. As such, the demand for ECTs in particular may be significantly higher than the modeling suggests.

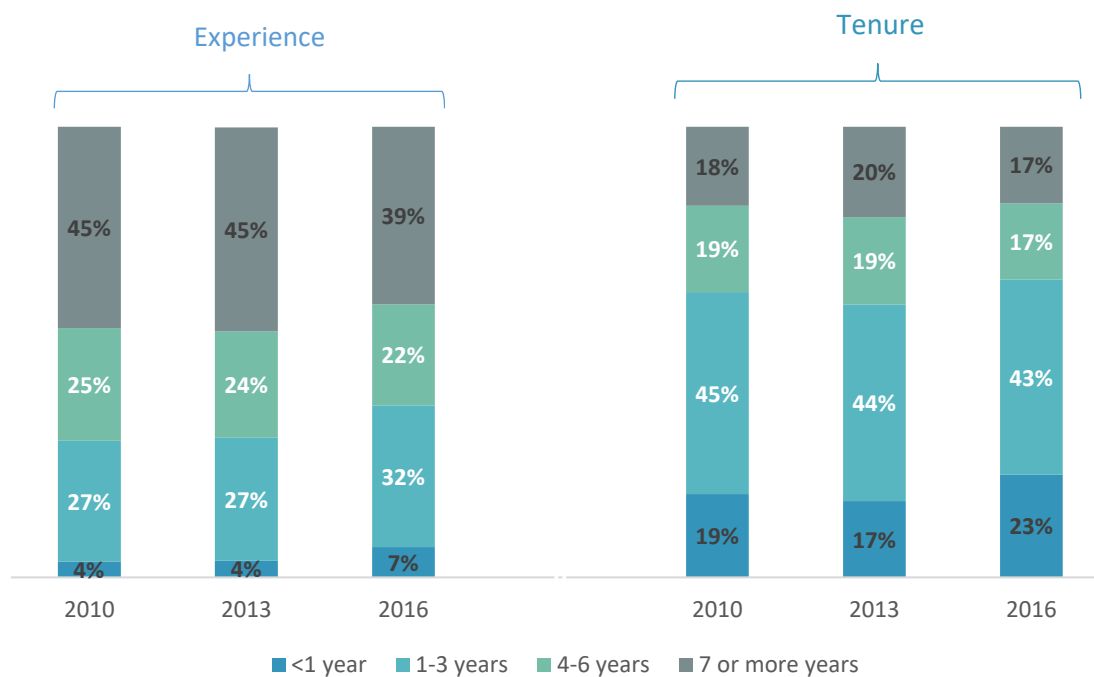
Staff experience and tenure

Based on the most recent [national workforce census](#) (undertaken in 2016 – preschools / kindergartens were not included), the average years of experience in the children's education and care sector for qualified staff was 7.4 years (5.7 years for family day care qualified staff; 7.7 years for long day care qualified staff; 7.8 years for outside school hours care qualified staff)

And the average years of tenure at their current service was 3.6 years (3.2 years for family day care qualified staff; 3.7 years for long day care and outside school hours care qualified staff).

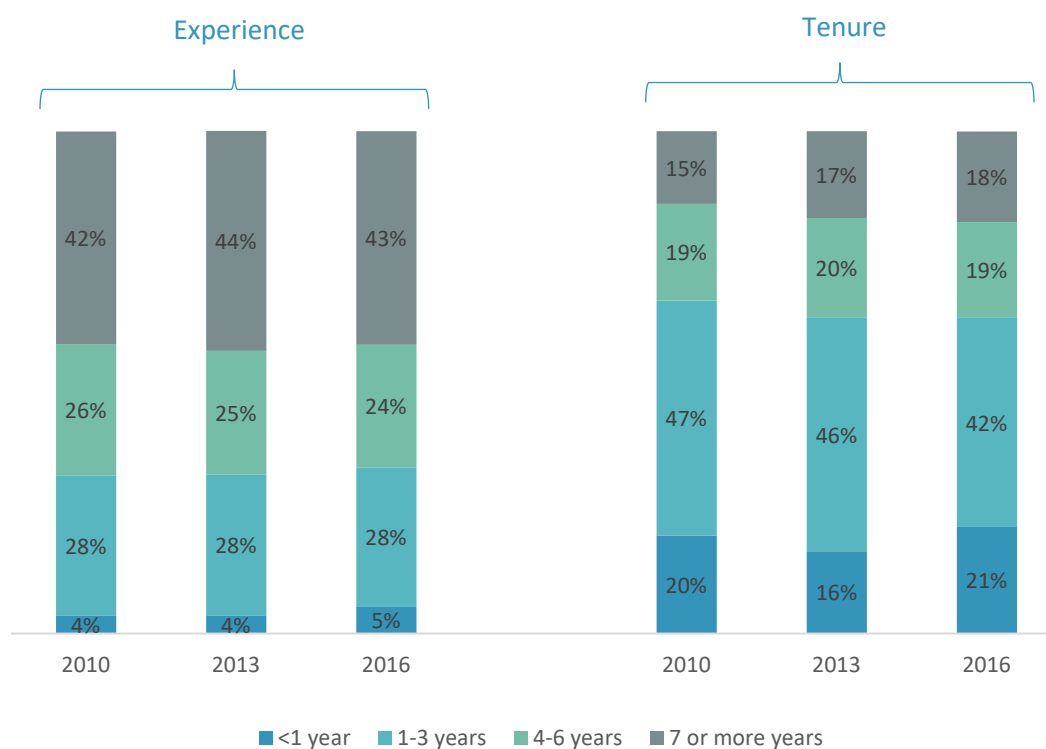
Compared to the 2010 and 2013 censuses, the 2016 census showed the lowest proportion of long serving (seven or more years) qualified staff, as well as the highest proportion of short serving (less than one year) qualified staff. These overall results were due to a significant shift in the years of experience and tenure of family day care qualified staff in 2016. The picture for long day care and outside school hours care (OSHC) qualified staff is much more stable over time.

All services



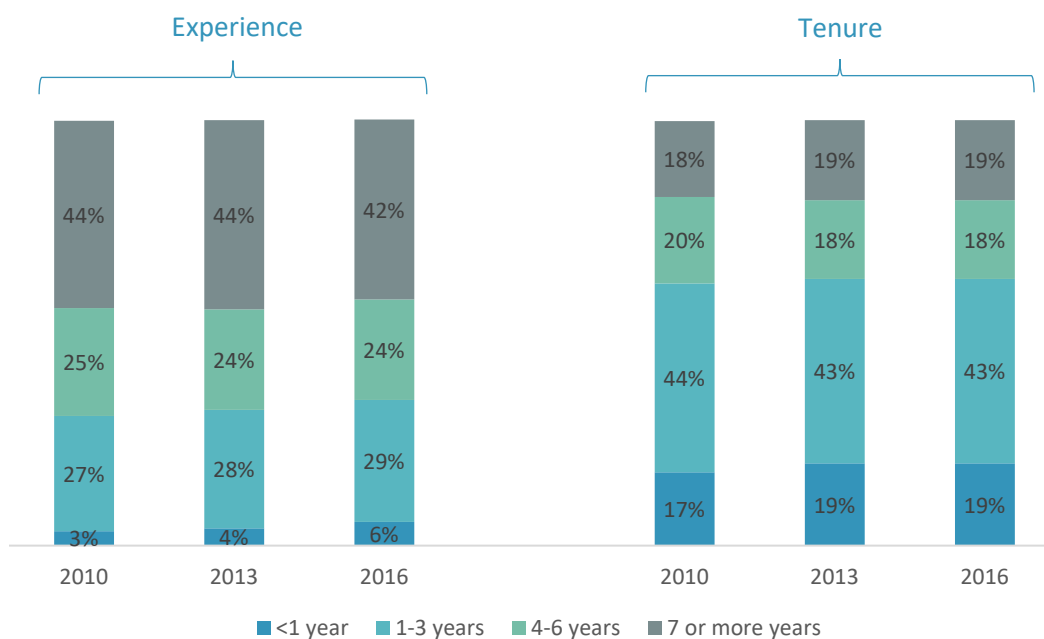
Source: Australian Government Department of Education, ECEC Workforce Census, years 2010, 2013, 2016.

Long Day Care Services



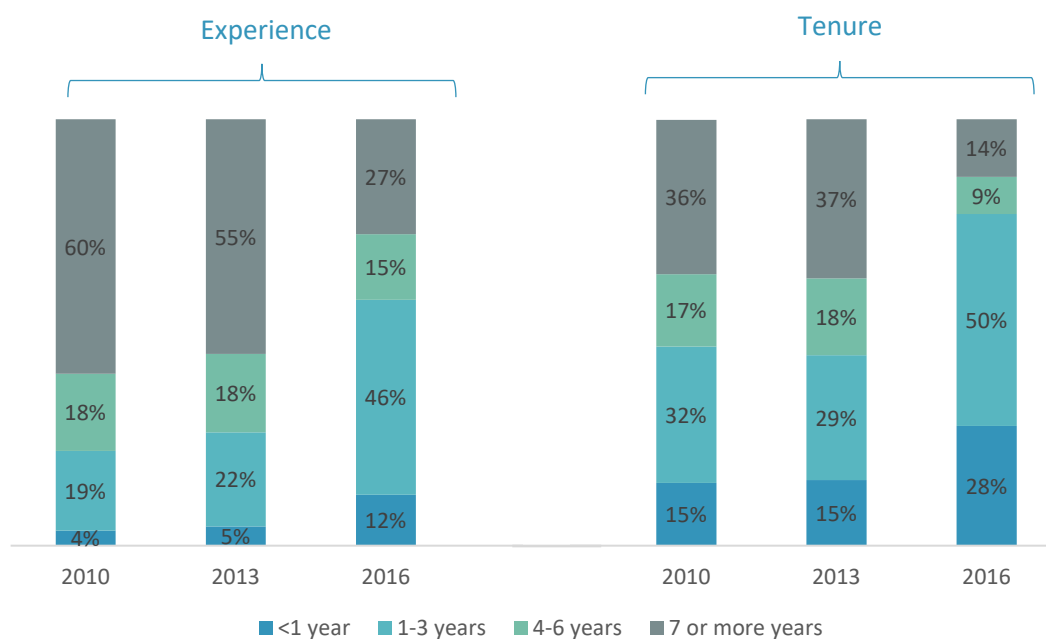
Source: Australian Government Department of Education, ECEC Workforce Census, years 2010, 2013, 2016.

OSHC Services



Source: Australian Government Department of Education, ECEC Workforce Census, years 2010, 2013, 2016.

Family Day Care



Source: Australian Government Department of Education, ECEC Workforce Census, years 2010, 2013, 2016.

Based on the 2016 census, more than one-third (38%) of qualified staff have less than four years' experience in the children's education and care sector, with two-thirds (66%) having less than four years tenure at their current service.

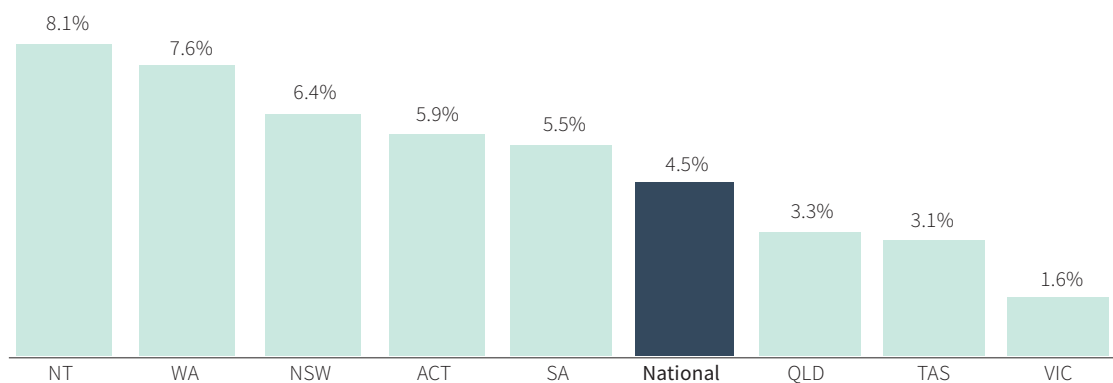
Given the picture was not dissimilar in 2013 and 2010 (when approximately 30% of staff had less than four years' experience and 60% had less than four years tenure), this emphasises the ongoing and significant challenge of workforce retention and turnover in the sector.

It is likely that many of the qualified staff reported in the 2016 census may already, or will soon, no longer be working in the sector.

Waivers

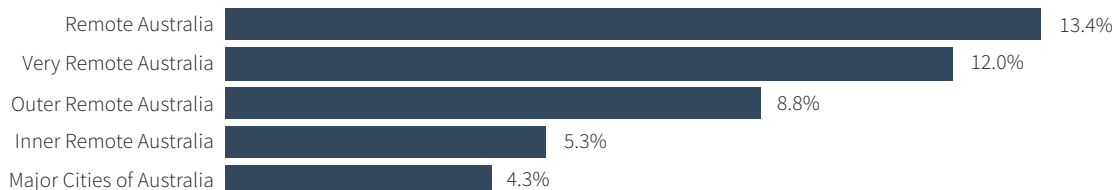
Under the NQF, approved providers of children's education and care services can apply to the state or territory regulatory authority for either a service waiver (where they anticipate being unable to meet legislated requirements on an ongoing basis) or a temporary waiver (where they anticipate the issue can be addressed within 12 months). Typically, service waivers relate to issues with the physical environment and temporary waivers relate to issues with staffing.

As at 31 October 2019, the national proportion of services with a temporary waiver for staffing requirements is 4.5%, ranging from 8.1% in the Northern Territory to 1.6% in Victoria.



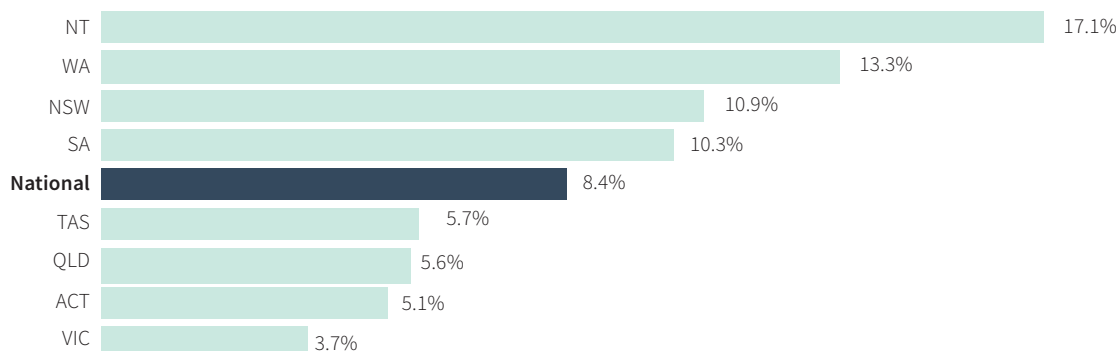
Source: ACECQA, NQF Snapshot as of 30 September 2019.

As well as variation by jurisdiction, there is related variation by geographic remoteness, with a higher proportion of services in remote (12%) and very remote (13%) areas having a temporary staffing waiver in place, compared to inner regional (5%) areas and major cities (4%).



Source: ACECQA, NQF Snapshot as of 30 September 2019.

There is also related variation by service type, with 17% of long day care services in the Northern Territory and 13% of long day care services in Western Australia having a temporary staffing waiver, compared to less than 4% of long day care services in Victoria. The national proportion of long day care services with a temporary staffing waiver is 8.4%, compared to 2.7% of preschools/kindergartens.

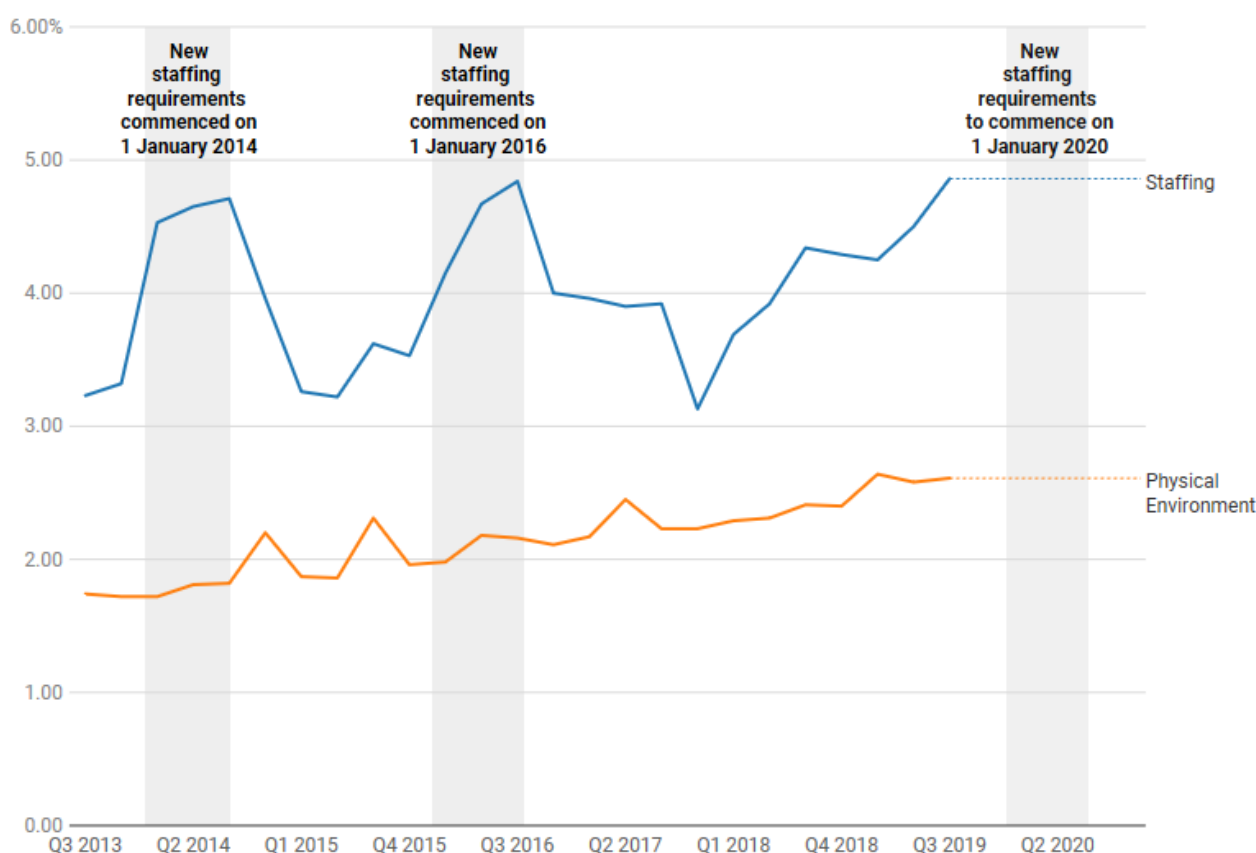


Source: ACECQA, NQF Snapshot as of 30 September 2019.

While the proportion of services with a waiver in place for physical environment requirements over time has largely shown a slow and steady increase, the proportion of services with a waiver in place for staffing requirements has been more volatile, mostly due to the staged introduction of the relevant staffing requirements under the NQF.

The proportion of services with a staffing waiver peaked in Q3 2016 (at 4.84%) and Q3 2014 (at 4.71%). Recent data suggest another impending higher peak, with the proportion of services with a staffing waiver at 4.86% in Q3 2019, up from 4.34% a year earlier.

It is important to note that there remains one further step up in staffing requirements under the NQF – from [1 January 2020](#), providers of long day care services and preschools / kindergartens will need to have a second ECT or, alternatively, a ‘suitably qualified person’ in attendance when 60 or more children preschool age or under are being educated and cared for. Services located in NSW are unaffected by these changes, as additional early childhood teaching staffing requirements have been in place in that state for several years.



Source: ACECQA, NQF Snapshot as of 30 September 2019.

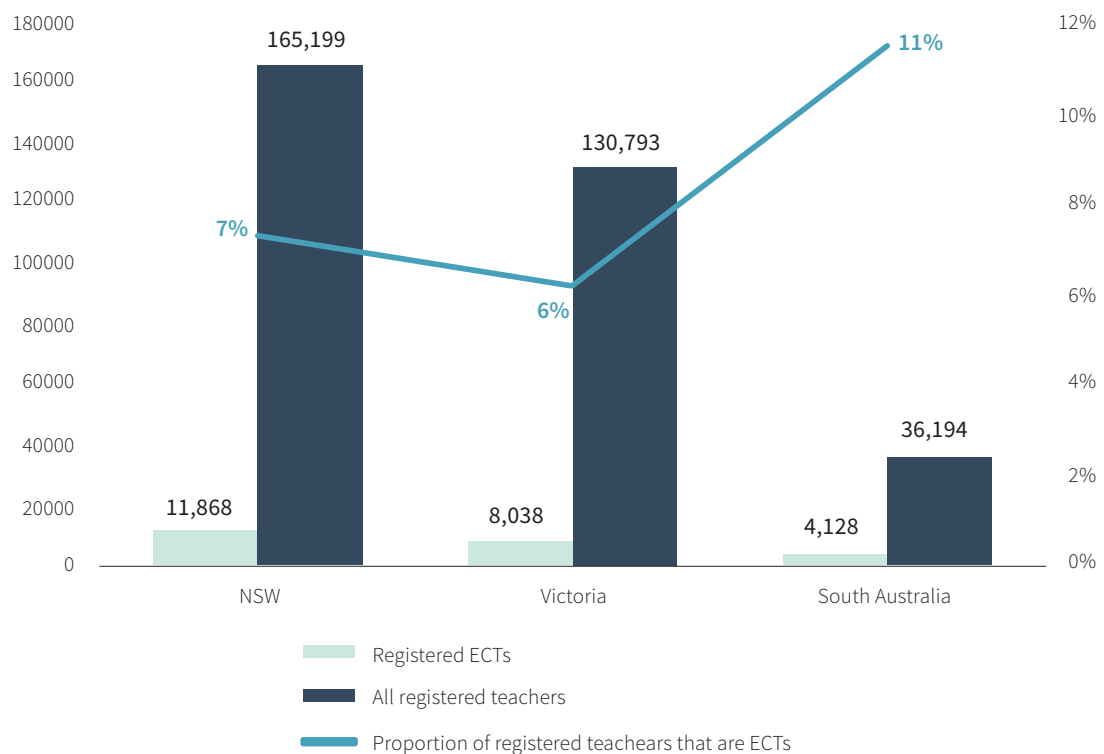
Looking at the most recent financial year, between 1 July 2018 and 30 June 2019, just over 1,000 long day care services submitted an application for a staffing waiver. The vast majority of these applications (more than 95%) related to the early childhood teacher requirements under the NQF (Regulations 130-134 of the Education and Care Services National Regulations).

Teacher registration/accreditation

Currently, teacher regulatory authorities in four jurisdictions require the registration (referred to as accreditation in NSW) of all ECTs working in early childhood settings. Apart from in South Australia, the registration of ECTs is relatively new, with Western Australia introducing the requirement in December 2012, Victoria in September 2015 and NSW in July 2016.

More than three-quarters of long day care services and preschools/kindergartens under the NQF are in NSW (36%), Victoria (26%), South Australia (7%) and Western Australia (6%).

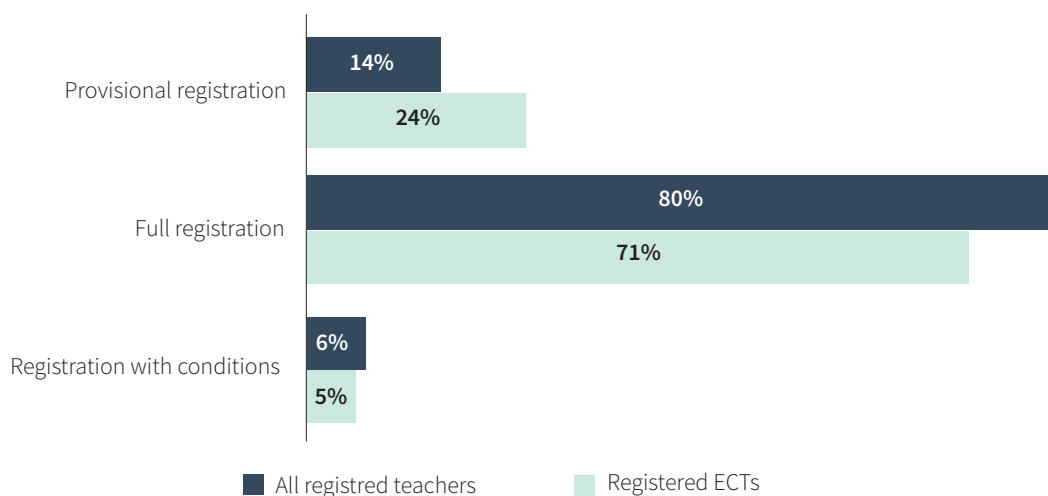
Based on data provided by three teacher regulatory authorities, early childhood teachers represent around 7% of the registered teaching workforce, with a higher proportional share in South Australia due to its long standing requirement for early childhood teacher registration.



Source: Customised data provided by state/territory teacher regulatory authorities, as at September 2019.

While individual registration categories can be complex and vary by jurisdiction, there are three main categories – provisional registration; full registration; registration with conditions.

Approaching three-quarters (71%) of ECTs in NSW, Victoria and South Australia have obtained full registration. This compares to four-fifths (80%) of all teachers in these three states.



Source: Customised data provided by state/territory teacher regulatory authorities, as at September 2019.

Higher education commencements and completions

Some degrees exclusively qualify graduates to teach children aged birth to five in prior to school settings, while some exclusively qualify graduates to teach school age children. However, there are many initial teacher education (ITE) programs that cover birth to eight or birth to 12 years, qualifying graduates to teach as both ECTs and primary school teachers (dual teaching degrees).

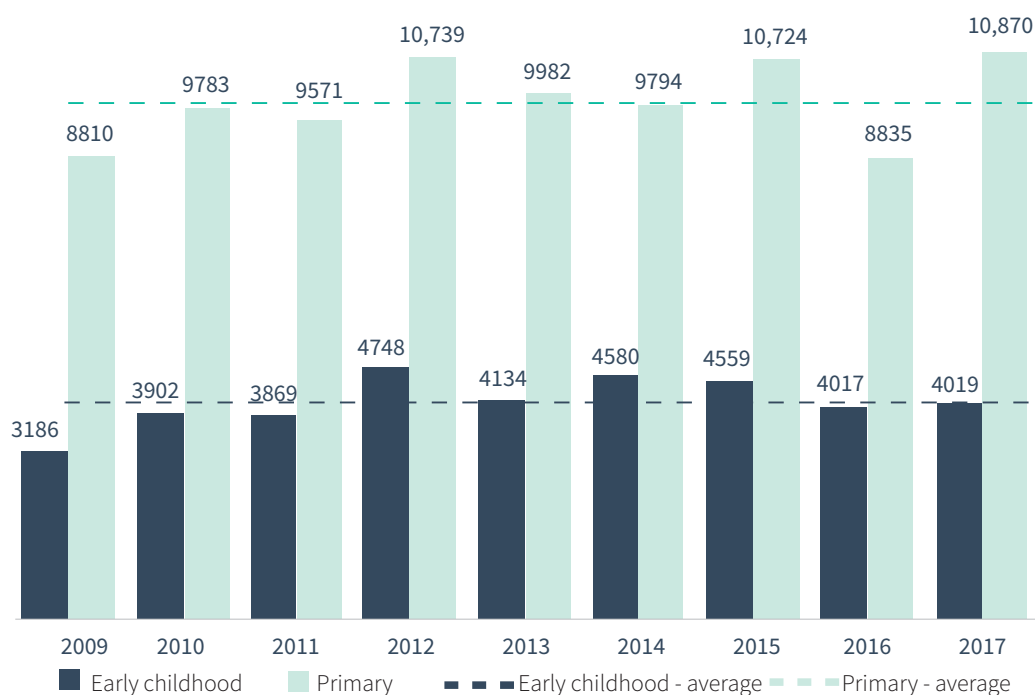
Classification of courses is undertaken by individual higher education institutes and as such, there is variation around what is classified 'early childhood' and 'primary' for the purposes of reporting. As a general rule birth to five and birth to eight focussed programs are classified as 'early childhood' while birth to 12 programs are typically, however not exclusively, classified as 'primary'. Post graduate programs developed specifically for registered teachers updating or changing specialisations (e.g. birth to five post graduate certificates for primary qualified teachers) are not included in these classifications as they are not considered ITE.

While commencement numbers for early childhood and primary ITE programs have increased overall in recent years (a 24% increase from the combined total of 11,996 commencements in 2009 to the combined total of 14,889 commencements in 2017), there has been a more recent 12% decrease for early childhood ITE programs from 4,580 commencements in 2014 to 4,019 commencements in 2017.

Interestingly, while 2016 represented the lowest (8,835) number of primary commencements out of the last nine years of available data, 2017 represented the highest (10,870). In contrast, 2012 represented the highest (4,748) number of early childhood commencements, likely influenced by the introduction of the National Quality Framework (NQF) at the start of that year.

The most recent data suggest that early childhood commencements are at their lowest level since before the introduction of the NQF.

Initial teacher education - commencements

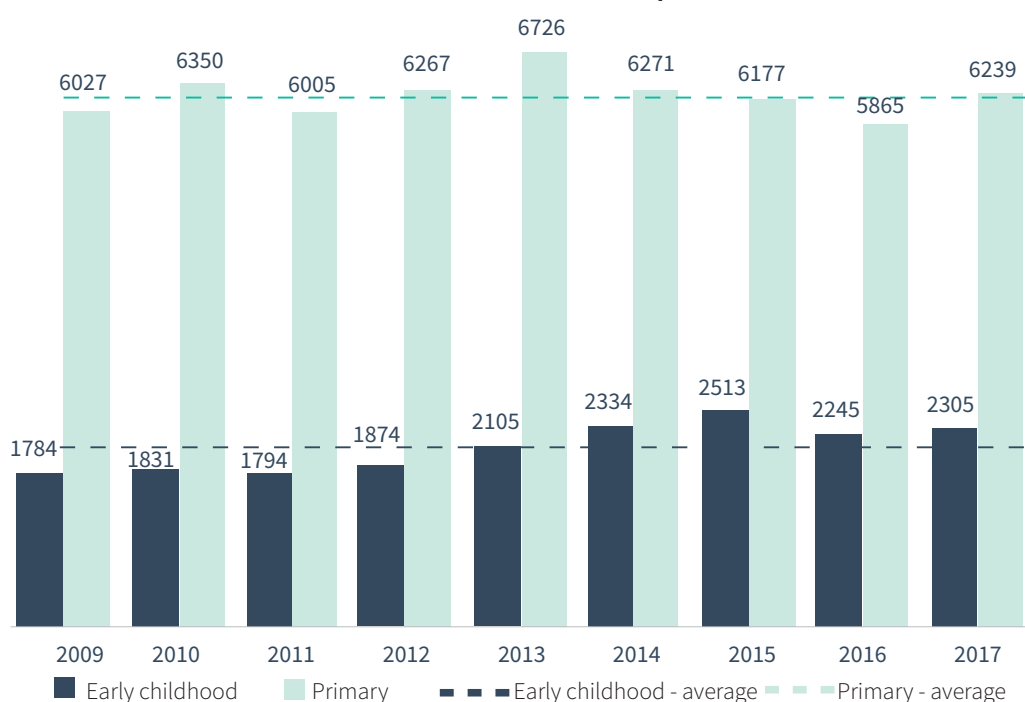


Source: Australian Government Department of Education, Research and Economic Group, customised unpublished data as of 30 December 2017.

Again, while completion numbers for early childhood and primary ITE programs have increased overall in recent years (a 9% increase from the combined total of 7,811 completions in 2009 to the combined total of 8,544 completions in 2017), there has been a more recent 8% decrease for early childhood ITE programs from 2,513 completions in 2015 to 2,305 completions in 2017.

The peak in 2015 for early childhood completions correlates with the peak in 2012 for early childhood commencements (based on a typical four year timeframe to complete a domestic ITE degree).

Initial teacher education - completions



Source: Australian Government Department of Education, Research and Economic Group, customised unpublished data as of 30 December 2017.

Higher education completion rates and graduate outcomes

The Australian Government Department of Education's cohort analysis tracks student completions via their unique student identifier and reports whether students have completed, are still enrolled or have discontinued their studies.

Based on the 2014 cohort of students, the completion rate for early childhood teaching degrees (41%) was more than ten percentage points lower than for primary and secondary teaching degrees (53%), with the completion rate for all higher education degrees being 55%.

The proportion of students still enrolled and completing their studies was higher for early childhood teaching degrees (41%) than primary and secondary teaching degrees (35%), likely attributable to a relatively high proportion of part-time students undertaking early childhood teaching degrees (early childhood teaching students are often employed in the sector while completing their studies). However, early childhood teaching students are also more likely to discontinue their studies (18%) compared to other initial teacher education students (12%).

2014 cohort of students	Completed	Still enrolled	Discontinued
Early childhood teaching students	41%	41%	18%
Primary and secondary teaching students	53%	35%	12%
All higher education students	55%	34%	11%

Source: Australian Department of Education, Quality Indicators for Learning and Teaching, Graduate Outcomes Survey 2018

While the proportion of early childhood graduates obtaining employment in early childhood settings has increased over the past three years (from 35% in 2015 to 43% in 2017), it still accounts for less than half of graduates. This is likely to be due to a large number of students undertaking early childhood courses that cover the birth to eight age range who go on to seek employment as primary school teachers.

Only a very small proportion of primary graduates obtain employment in early childhood settings (1-3%). This would suggest that relatively few students undertaking courses that cover the birth to 12 age range go on to seek employment as early childhood teachers.

Graduate Outcomes Survey	2015		2016		2017	
	Early Childhood	Primary	Early Childhood	Primary	Early Childhood	Primary
Employed in schools	56%	70%	67%	76%	59%	77%
Employed in early childhood settings	35%	1%	41%	3%	43%	2%
Full-time further study	4%	4%	3%	3%	2%	2%
Not employed	5%	7%	5%	7%	6%	8%

Source: Australian Department of Education, Quality Indicators for Learning and Teaching, Graduate Outcomes Survey 2018

Vocational education enrolments and completions

There are currently six nationally accredited children's education and care educator qualifications approved under the NQF:

- Certificate III in Early Childhood Education and Care
- Diploma of Early Childhood Education and Care
- Certificate III in Education Support
- Certificate IV in Education Support
- Certificate IV in School Age Education and Care
- Diploma of School Age Education and Care.

In 2018, there were just over 135,000 student enrolments across these six qualifications, with the Diploma of, and Certificate III in, Early Childhood Education and Care (ECEC) accounting for more than 105,000 enrolments.

It has been a similar picture over the most recent four years of available data, with the early childhood education and care qualifications accounting for around 80% of the enrolments.

In terms of year on year trends, the 2018 number of enrolments is similar to the four year average for three of the six qualifications, while the number of enrolments in the Diploma of ECEC in 2018 is down by 25% compared to the four year average, and the number of enrolments in both the Certificate IV in Education Support and Diploma of School Age Care is up by around 33%.

The total number of enrolments in 2018 across the six qualifications represents a 7% decrease on the four year average, with at least 5,000 fewer enrolments in 2018 compared to any of the preceding three years.

Despite declining enrolment numbers since 2016, the Diploma of, and Certificate III in, ECEC are both in the top three most enrolled vocational and training qualifications (between 2015 and 2017, the Diploma of ECEC was the most enrolled qualification, with the Certificate III in Individual Support becoming the most enrolled qualification in 2018).

Enrolments	2015	2016	2017	2018	Average
Certificate III in ECEC	51,710	53,941	53,793	52,802	53,062
Diploma of ECEC	67,307	74,954	67,281	52,237	65,445
Certificate III in Education Support	15,991	17,714	18,182	17,843	17,433
Certificate IV in Education Support	4043	6100	7953	10,402	7125
Certificate IV in School Age Care	706	438	477	475	524
Diploma of School Age Care	573	843	1000	1569	996
Total	140,330	153,990	148,686	135,328	144,584

Source: National Centre for Vocational Education Research (NCVER), Total VET Activity 2015-2018, accessed through VOCSTATS.

In 2018, there were just over 37,500 student completions across these six qualifications, with the Diploma of, and Certificate III in, Early Childhood Education and Care (ECEC) accounting for more than 28,000 completions.

As with enrolments, the early childhood education and care qualifications account for around 80% of the completions in the last four years.

In terms of year on year trends, the 2018 number of completions is very similar to the four year average for three of the six qualifications, while the number of completions in the Certificate IV in School Age Care in 2018 is down by 29% compared to the four year average, the number of completions in the Certificate IV in Education Support is up by 25%, and the number of completions in the Diploma of School Age Care is up by 46%.

Although the total number of completions in 2018 across the six qualifications represents a 4% increase on the four year average, this is due to the comparatively low number of completions in 2015. There were fewer completions in 2018 compared to the two preceding years.

Despite declining completion numbers since 2016, the Diploma of, and Certificate III in, ECEC are both in the top six most completed vocational and training qualifications (in 2018, the Certificate III in ECEC was the second most completed qualification, with the Certificate III in Individual Support the most completed qualification).

Completions	2015	2016	2017	2018	Average
Certificate III in ECEC	15,099	15,605	15,508	15,205	15,354
Diploma of ECEC	8585	15,545	13,968	13,098	12,799
Certificate III in Education Support	3972	4947	5645	5166	4933
Certificate IV in Education Support	1698	2352	2877	3476	2601
Certificate IV in School Age Care	344	144	126	147	190
Diploma of School Age Care	79	178	227	418	226
Total	29,777	38,771	38,351	37,510	36,102

Source: National Centre for Vocational Education Research (NCVER), Total VET Activity 2015-2018, accessed through VOCSTATS.

Vocational education completion rates and graduate outcomes

Based on those students enrolling with a unique student identifier, the projected completion rates for the 2015, 2016 and 2017 cohorts range between 42-51% (for the Diploma of Early Childhood Education and Care) to 64-70% (for the Certificate IV in Education Support).

While the overall projected completion rates for the six nationally accredited children's education and care educator qualifications appear low (44% for the 2015 cohort, 49% for the 2016 cohort and 50% for the 2017 cohort), they are consistent with the overall completion rate across the vocational education and training sector (45% for the 2015 cohort, 47% for the 2016 cohort and 49% for the 2017 cohort).

Projected completion rates	2015	2016	2017
Certificate III in ECEC	46%	50%	57%
Diploma of ECEC	42%	45%	51%
Certificate III in Education Support	43%	51%	60%
Certificate IV in Education Support	64%	63%	70%
Certificate IV in School Age Care	68%	50%	52%
Diploma of School Age Care	45%	51%	50%
Total (for six qualifications)	44%	49%	50%
All vocational education and training	45%	47%	49%

Source: National Centre for Vocational Education Research, customised unpublished completion rate calculations as of 30 December 2018

Employment outcomes are collected by NCVER through the [National Student Outcomes Survey](#). Half (50%) of graduates obtain employment after completing one of the six nationally accredited children's education and care qualifications.

Graduate Outcomes Survey	Employed
Certificate III in ECEC	43%
Certificate III in Education Support	44%
Certificate IV in School Age Care	84%
Certificate IV in Education Support	55%
Diploma of ECEC	60%
Diploma of School Age Care	84%
Total	50%

Source: National Centre for Vocational Education Research, VET student outcomes 2018 report; Customised student outcomes data accessed through VOCSTATS.

Pay and conditions

A key issue impacting on attraction and retention of qualified staff is the disparity between pay and conditions. The relatively low minimum starting salary, combined with limited career prospects, is reported by stakeholders as a significant disincentive for high quality educators and teachers to pursue a career in the sector.

The [Survey of Employee Earnings and Hours](#) conducted by the Australian Bureau of Statistics in May 2018 provides the median weekly total cash earnings for full-time employees in occupations across Australia. While the average gross weekly earnings for 'Child Carers' is above that of the national minimum wage, it is well below the overall average gross weekly earnings. The average gross weekly earnings for 'Child Care Centre Managers' is also below the national average.

Occupation	Average gross weekly earnings
National minimum wage (safety net)	\$741
Child Carers	\$953
Child Care Centre Managers	\$1,272
Early Childhood (Pre-primary School) Teachers	\$1,488
Primary School Teachers	\$1,801
All occupations	\$1,460

Source: Australian Bureau of Statistics (ABS) Survey of Employee Earnings and Hours, May 2018

The below table summarises the minimum salary for different roles based on starting classification.

Occupation	Minimum gross weekly wages	Minimum gross annual salary
National minimum wage	\$740.80	\$38,521.60
Certificate III level educator	\$862.50	\$44,850.00
Diploma level educator	\$920.30	\$47,855.60
Early childhood teacher (3yr trained)	\$990.73	\$51,518.00
Early childhood teacher (4yr trained)	\$1,038.67	\$54,011.00
Director	\$1,225.10	\$63,705.20
School teacher (graduate)	\$1,325.56	\$68,929.00
School teacher (proficient)	\$1,598.77	\$83,136.00
Principal	\$2,729.44	\$141,931.00

Source: Children's Services Award 2010; Educational Services (Teachers) Award 2010; Crown Employees (Teachers in Schools and Related Employees) Salaries and Conditions Award 2014 (NSW)

The minimum starting salary for 'proficient' school teachers (i.e. those who meet the base level of registration/accreditation) is substantially higher than the starting salary for a four year trained ECT, despite similar (and often the same) qualification requirements.

6. STAKEHOLDER PERSPECTIVES



As part of this project, ACECQA undertook two main forms of stakeholder consultation – individual stakeholder interviews in June and July 2019 culminated in a national workforce forum in September 2019.

National workforce forum

On 13 September, ACECQA hosted a national workforce forum to test initial findings and consult on options for future approaches to workforce development.

The forum was attended by 80 sector stakeholders, including employers, peak associations, governments, unions, teacher regulatory authorities and higher education providers.

During the forum, stakeholders were asked to prioritise and rank key themes, before identifying any particularly challenging or missing components. Issues identified included:

- a growing need for consistent national messaging and promotion of the value of the sector
- the importance of establishing and reinforcing the sector's professional identity
- the critical impact that induction and ongoing support has on new educators and teachers
- the role of graduate standards, teacher registration and communities of practice in supporting early career teachers to develop into high quality educational leaders.

There was consistent stakeholder support for governments to leverage various policy developments. For example, many stakeholders indicated support for mandatory and nationally consistent registration of early childhood teachers, underpinned by an amended version of the Australian Professional Standards for Teachers that is inclusive of early childhood settings.

Stakeholders also consistently supported a national communications campaign to raise the profile of children's education and care, and attract high achievers to consider careers in the sector. Such a campaign would also support the sector's professional identity.

Perhaps unsurprisingly, there were fewer opportunities identified and supported at jurisdictional and local levels. This is likely a reflection of the sector's desire for national leadership on workforce issues, which are seen as challenging and complex.

In keeping with the results of an activity undertaken by attendees on the day of the forum, a follow up survey of attendees ranked the following three issues as being of highest priority for any future national workforce strategy:

- Workforce retention
- Workforce capacity and leadership capability
- Community perceptions of the children's education and care sector.

Stakeholder interviews

In June and July 2019, ACECQA undertook a series of targeted interviews with a range of stakeholders.

While all stakeholders broadly supported the increasing staffing requirements introduced by the NQF, they all felt that workforce was one of the most challenging issues experienced by the sector due to both a decline in supply of quality educators and teachers, as well as increasing burn-out and attrition of experienced educators and teachers.

In many instances, stakeholders were unaware of initiatives available to support workforce development in their respective jurisdictions. Most believed that governments had a stronger role to play in promoting and facilitating careers in the education and care sector.

Employers

All employers interviewed indicated that workforce considerations, in particular recruiting and retaining high quality staff, are an ongoing challenge.

For providers of long day care and kindergarten/preschool, employers cited the ability to recruit and retain ECTs as the number one challenge, both in terms of undersupply (typically rural and remote areas, although increasingly in high socio-economic areas due to cost of living) and retention (employers reported high competition for ECTs from other services and local primary schools).

Many employers reported that their ECTs were often their 'least engaged' staff cohort, with some waiting on a better employment option, typically from the school system.

Several employers reported the issue of pay compression, where inexperienced or poor quality ECTs can sometimes negotiate higher pay than those in leadership positions within the service due to the necessity to achieve and maintain regulatory compliance.

Combined with a lack of visible professional development and career progression opportunities, this can contribute to poor morale within a service, not least of all on account of experienced educators feeling undervalued. Many large providers indicated pay compression presented them with equity issues in terms of their enterprise agreements.

The lack of professional support for all educators, especially ECTs, was also commonly cited as an issue. While many large employers were able to make use of their economies of scale to implement ongoing opportunities for networking, mentoring and professional development, these supports are not as easily accessed by smaller providers.

Accessing a supply of quality, vocationally trained educators (at certificate III, certificate IV and diploma levels) was a common challenge across all provider types. Despite a number of reforms over the past five years aimed at improving quality, employers reported that many vocationally trained educators were still not 'job ready' and did not have realistic expectations about what working in children's education and care entails.

Short duration qualifications and poor knowledge of the NQF were the most commonly cited reason for poor quality, with many new graduates reportedly unable to explain the principles behind their practice. Most large providers had either established their own RTO, or established a formal partnership with one or more RTOs, in an attempt to improve quality.

Providers of OSHC services experience additional intrinsic and entrenched challenges due to their 'highly casualised' workforce, including a high number of students for whom intermittent employment takes second priority to their tertiary studies. Competition from other education and care providers, particularly long day care services where hours are more regular, also results in a high turnover of educators in particular, but also coordinators.

Some providers indicated that a move to permanent part-time contracts has reduced turnover, along with financial and other incentives based on performance and tenure. However, the lack of professional development opportunities, in particular OSHC-specific professional development opportunities, can leave many educators feeling undervalued.

Many employers were not aware of current initiatives available to support their workforce and felt that the administrative burden of applying for funding and the ongoing reporting requirements often outweighed the potential benefits. While most employers supported the concept of scholarships and funded training, almost all believed recipients should be expected to commit to a certain period of time working in the sector, particularly those receiving funding for ECT degrees.

Traineeships were commonly mentioned as the preferred mode of training for vocationally qualified educators. However, many reported that trainees were difficult to come by. OSHC providers in particular were supportive of traineeships but were often ineligible due to restrictions on minimum hours of work which do not fit the typical working hours of an OSHC educator.

Traineeships were seen as advantageous as students were required to spend a certain proportion of days each week working in the service and therefore had more realistic expectations of what the job entailed. Many employers reported dissatisfaction with newly qualified educators who had spent only 20 days (the minimum requirement for the Certificate III in Early Childhood Education and Care) in an education and care setting.

Peak associations

A common theme raised by all peaks that were interviewed was the importance of public promotion of the children's education and care sector, in particular the wide and varied career opportunities. It was noted that there is often movement of educators between service types, with a high proportion of OSHC coordinators and managers seeking employment in long day care services, as well as growing movement of educators from long day care to family day care.

Peak associations acknowledged the link between high quality services and retention, noting that smaller, high quality services typically don't experience the same challenges with turnover and attrition, although there are limited opportunities for career progression. In addition, many high quality large providers have been able to implement large scale regional and/or national mentoring, support and professional development programs. Several peaks questioned whether these economies of scale could be used to bring mentoring, support and professional development to the broader sector.

Many peaks were concerned about the quality of new graduates, with specific concerns that ECTs often have theoretical, but not practical, skills and that this can be problematic when they are expected to perform, often in leadership positions, from their first day of employment. In many cases, ECTs have the pedagogical knowledge but have not covered management, leadership or compliance in their degrees. There was discussion around what career progression looks like for ECTs who do not want to be managers, with anecdotal evidence that many of these leave the sector to work in schools where there are opportunities to be specialists.

Vocationally trained educators were also a concern due to the variable quality of RTO training delivery. Peaks indicated a definite preference for traineeships and school based apprenticeships in collaboration with employers so that students receive significant on-the-job experience to consolidate the skills and knowledge from their studies. These models also offer opportunities to ensure that students have the right disposition for a career in the sector.

Higher education providers

The Australian Early Childhood Teacher Education Network ([AECTEN](#)) is a subcommittee of the Australian Council of Deans of Education and represents the 43 providers of ECT education degree programs in Australia. ACECQA interviewed seven members across their five branches.

Almost all higher education providers acknowledged the ongoing tension experienced when developing and delivering dual sector teaching qualifications (i.e. qualifications that qualify graduates to work as both primary and ECTs). The challenges are twofold.

From a course design perspective, higher education institutes offering dual sector degrees must ensure the programs meet both ACECQA's [requirements](#) and the AITSL [Standards and Procedures](#) for Initial Teacher Education. Reforms to school based ITE put increasing pressure on higher education providers to ensure the primary school components of their course meet additional requirements – most notably, increased entry requirements, requirements for an additional specialisation and a standardised final capstone assessment.

While these elements in isolation should not detrimentally affect the early childhood components of the course, higher education providers report an overall 'squeezing out' of early childhood content. As the ACECQA requirements for approved ECT programs are not as explicit as those for school-based ITE, providers report increasing pressure to negotiate less early childhood content in an attempt to meet accreditation requirements. This is particularly prevalent in birth to 12 ITE courses.

From a practical implementation perspective, this shift in course design is impacting students. Higher education providers report that up to 80% of students report a preference for careers in the school sector, rather than early childhood. Of the students who obtain work in prior to school settings upon graduation, at least half are still actively seeking employment in schools.

Almost all higher education providers report that their best graduates are offered 'the best positions [in schools]'. Indeed, higher education providers are often approached by school employers prior to graduation in an attempt to secure the most promising students. Anecdotally, high quality students often receive employment offers during their final school-based practicum placement.

Higher education providers are aware of the challenges this creates for the children's education and care sector. Almost all providers vehemently supported the role of ECTs in prior-to-school settings however believed the lower standard of pay and conditions, combined with the lack of professional support and career opportunities often afforded within the education and care sector, contributed to this divide.

Some higher education providers expressed dissatisfaction of employer expectations of newly graduated ECTs, comparing it to the support offered by the school system.

New career ECTs often find themselves in senior positions within a long day care service, planning and developing curriculum across the service for large numbers of children, and dealing with families around complex service management issues.

There are high expectations that newly graduated ECTs ‘hit the ground running’. This is compared to the far more structured and supported induction program undertaken in the school sector. In addition, there was general agreement that there needed to be more realistic promotion of careers in children’s education and care.

Several higher education providers reported that the majority of their ECT student cohort are ‘mature age’ (i.e. not enrolling directly from high school with an ATAR) and are either working in, or are seeking to work in, the children’s education and care sector while they complete their studies. Transitional provisions in the Education and Care Services Regulations that apply in most jurisdictions, such as Regulation 242 (‘Taken to be an ECT’), support these arrangements.

However, this flexibility comes at a cost. Higher education providers report challenges experienced by students attempting to manage a study load with full time employment. This results in students ‘slowing down’ their study in an attempt to keep up with their day to day employment demands. ECT students experience a greater rate of burn out, with many institutions introducing wellbeing units in an attempt to support their student cohort.

This trend similarly impacts on graduate destinations. One higher education institute reported that as their ECT students are working as ECTs in long day care settings while studying, they are naturally looking for new opportunities upon graduation. The lack of career progression as experienced teachers, beyond that of management or director roles, leads these new graduates to seek employment in the school sector.

While some higher education institutes expressed a desire to move to early childhood exclusive birth to five years oriented courses to prevent these issues, this was not unanimously supported. Most academics identified birth to eight years as the ideal age range for ECTs, with focus on a ‘birth upwards’ approach to course development.

The inclusion of early childhood practice, particularly practice with babies and toddlers, as part of the APST was universally supported as the best way to lift professional standards and align expectations for ECTs with the rest of the teaching profession.

State and territory teacher regulatory authorities

Teacher regulatory authorities that have recently commenced registration/accreditation of ECTs reported a positive experience for all stakeholders. All teacher regulatory authorities that were interviewed indicated support for a nationally consistent approach to recognition of ECTs.

However, it was uncertain whether there would be support for nationally consistent registration/accreditation processes, with each jurisdiction explaining that their approach to registration/accreditation was responsive to the needs of their local jurisdiction. All teacher regulatory authorities indicated that deliberations about a potential national approach were unlikely to proceed prior to the recommendations from the National Review of Teacher Registration report being accepted by Education Council.

Teacher regulatory authorities were supportive of recommendations to improve the way early childhood practice is reflected in the APST. However, there was not consensus on whether there should be a revised version of the current standards or a separate set of standards / resources for ECTs.

In relation to ITE, teacher regulatory authorities appreciated challenges associated with accrediting dual sector (birth to eight and birth to 12) programs and were supportive of strategies to improve alignment of approval processes.

Interestingly, all teacher regulatory authorities that were interviewed believed that development of high quality dual sector ITE programs was feasible within the current standards and procedures for ITE, and that, most of the time, any barriers were created by the higher education providers, not the policy framework.

For example, multiple teacher regulatory authorities expressed the view that there was no barrier preventing an institute from running a TPA in a prior-to-school setting. This sits at odds with feedback from the higher education providers who continue to indicate they are restricted by the requirements of the teacher regulatory authorities.

Governments

Interviews with governments highlighted that, while there are many localised issues in specific jurisdictions, there are also common themes at a national level.

All governments raised concerns about the sustainability of the workforce, in particular the workforce pipeline and the growing concern among some groups of employers ahead of increasing requirements.

Rural and remote, and small service providers were of most concern, with some jurisdictions indicating these are experiencing significant difficulties in meeting current requirements and demand, let alone incoming requirements and future demand.

Quality was also often identified as an issue, with governments echoing feedback from other stakeholders that graduates are often not 'job ready' and have unrealistic expectations about working in the sector.

Many governments commented on the 'tiered' structure of the children's education and care sector, where working in a government preschool/kindergarten is often seen as most desirable, when compared to a long day care or outside school hours care service. This is reflected in the attrition of educators and teachers from the long day care sector into government services and subsequently schools.

Systemic sector issues were noted, such as the linear career pathways and highly feminised workforce, alongside historical perceptions of a 'care focused' sector. Some governments questioned whether the current qualifications (at both vocational and higher education levels) truly prepared educators and teachers for work in the sector.

The issue of professional development for educators was often raised. All governments were cognisant of the [Productivity Commission](#) recommendations that, aside from inclusion support, professional development is primarily the purview and remit of employers. Having said this, jurisdiction level sector consultations frequently identify professional development as a critical part of improving the professional identity of the sector.

Governments were broadly supportive of initiatives intended to build capacity of employers to better develop their staff and observed that the models of professional development implemented by some large providers could potentially be shared more broadly across the sector. Those jurisdictions that require teacher registration/accreditation for ECTs also spoke positively about the requirements for ongoing professional development.

There was also support for scholarship programs, noting that there were challenges in ensuring that scholarship recipients complete their study and stay in the sector, particularly recipients of ECT scholarships.

In some jurisdictions, interest in scholarship programs has sometimes been low, with such programs also occasionally exhibiting lower than expected completion rates. Some governments have implemented employment milestone payments and incentive payments for educators and teachers who stay in the sector and/or are employed in remote and regional areas.

The challenge of attracting locals in remote and regional areas, particularly Aboriginal communities, to scholarship programs was noted, with different models having been tested over time.

One successful, albeit expensive model, entailed paid immersive out of area residential placements as part of the scholarship program, which has been observed to significantly improve students' ability to focus solely on their studies and successfully complete the program.

While formal evaluations of many workforce initiatives had not been undertaken, governments did identify that support from employers and sector leaders was a critical component of whether an initiative succeeds.

The concept of partnership and co-contribution with the sector was potentially seen as highly attractive, as it removes the risk whereby initiatives are either not supported or not well known. However, there remained a common expectation in the sector that governments could and should unilaterally fund professional development and upskilling, reflecting the need for cultural change.

Most governments expressed concern about the availability of coherent, comprehensive data to provide a sound evidence base for policy decisions. In addition, many jurisdictions felt uncertain about current workforce estimates and whether the current figures truly represent the increased demand predicted over the next five to ten years.

Many jurisdictions did not have enough data to establish a baseline for the current workforce, let alone provide evidence of shortages or model requirements for future increases in demand. As a result, several jurisdictions have implemented their own data collection strategies through census surveys and audits. The lack of comprehensive, contemporary national data was frequently cited as an issue.

All governments agreed that addressing community perceptions around the value and professional identity of educators and teachers in the children's education and care sector could be best tackled at a national level. Promoting meaningful career paths was another focus that was felt best tackled nationally.

There was also discussion around the best ways to consolidate and disseminate information about different workforce initiatives, such as state and territory based scholarship programs, particularly for providers who operate across jurisdictions.

7. WORKFORCE SURVEY



Between 17 June and 22 July 2019, ACECQA undertook a targeted survey of existing children's education and care educators and teachers to gain an understanding of their intentions, motivations and career aspirations.

More than 1,600 responses were received and the key findings from the survey are listed below.

Demographics

- Almost one third (30%) of respondents were from NSW, followed by Victoria (28%), Queensland (21%), Western Australia (8%) and South Australia (6%)
- Most (83%) work at one service, while 17% work at more than one service
- More than half (53%) work at long day care services, followed by outside school hours care (32%), preschools / kindergartens (20%) and family day care services (10%)
- One fifth (20%) identified their main role as being an OSHC educator / coordinator, followed by diploma level educator (19%), nominated supervisor (19%) and ECT (15%)
- Approaching half (46%) hold a diploma level educator qualification and 39% hold an early childhood teaching qualification
- Just over half (51%) are employed full time, with 32% working part time and 17% having casual employment
- More than one third (35%) are the educational leader for their service(s)
- Slightly more (40%) have been employed at their service(s) for 1-5 years compared to those (39%) who have been employed for more than five years, with 21% employed for less than one year
- Just under three quarters (74%) have worked in the children's education and care sector for more than five years, with 20% having worked for 1-5 years.

Early childhood teachers

- Of the subset of respondents who identified that they are working as an ECT, 11% are actively working towards their teaching qualification
- Almost all (94%) qualified ECTs trained in Australia, with 3% holding qualifications from New Zealand
- Just under half (49%) hold undergraduate ECT qualifications, with 30% holding postgraduate qualifications
- Most (82%) are registered/accredited with their local teacher regulatory authority
- The most common (42%) type of ECT qualification covers the age range of birth to 8, with 34% holding qualifications that cover birth to five, and 18% covering birth to 12.

Diploma level educators

- Of the subset of respondents who identified that they are working as a diploma level educator, 10% are actively working towards their qualification
- Almost all (98%) qualified diploma level educators trained in Australia
- Most (90%) hold the Diploma of Early Childhood Education and Care.

Certificate III level educators

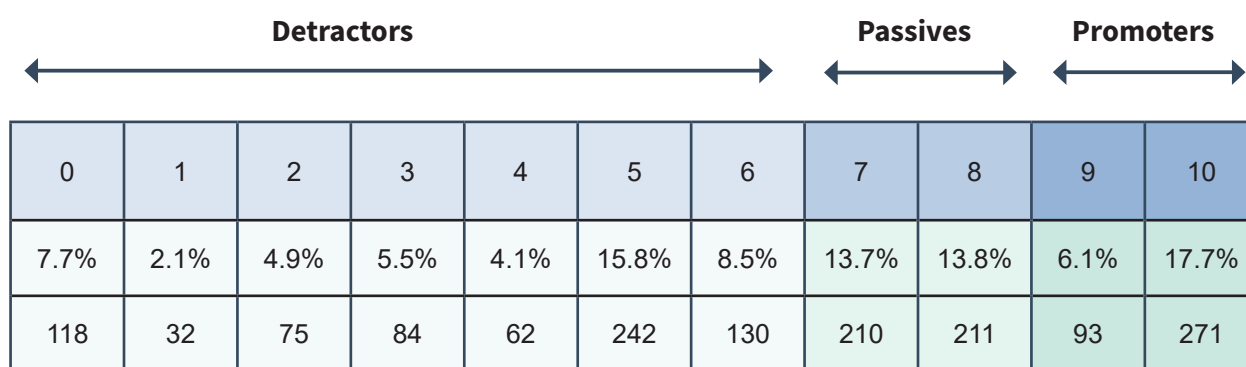
- Of the subset of respondents who identified that they are working as a certificate III level educator, 26% are actively working towards their qualification
- Again, almost all (99%) qualified certificate III level educators trained in Australia
- Most (92%) hold the Certificate III in Early Childhood Education and Care.

Outside school hours care educators

- Of the subset of respondents who identified that they are working in outside school hours care, 86% hold or are actively working towards an approved qualification
- More than half (59%) hold or are studying early childhood education and care qualifications, with 27% holding or studying primary, secondary or special education qualifications
- In terms of qualification level, more than half (53%) are qualified or studying at the diploma or advanced diploma level, with 20% at bachelor degree, 10% at certificate III, 9% at postgraduate and 7% at certificate IV.

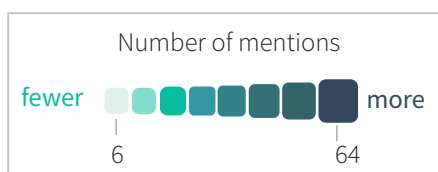
Career intentions and likelihood to recommend a career in children's education and care

- Approaching three quarters (72%) of respondents indicated that they intend to work in the children's education and care sector for at least another five years, with 24% indicating 1-5 years and 4% indicating less than one year
- On a scale from 0 (not at all likely) to 10 (extremely likely), 18% are extremely likely to recommend a career in the children's education and care sector to a friend or family member, with 8% not at all likely to do so
- Using the Net Promoter Score methodology in assessing respondents' likelihood of recommending a career in the children's education and care sector to a friend or family member – as per the graph below – (i.e. subtracting the percentage of customers who are 'Detractors' (scores of 0-6) from the percentage of customers who are 'Promoters' (scores of 9-10)) – gives a result of -25. A Net Promoter Score can be as low as -100 or as high as +100, with a positive result generally deemed good, +50 generally deemed excellent and +70 generally deemed exceptional.



Those respondents who indicated that they intended to leave the children's education and care sector within the next five years were asked a follow up question as to why this is. Below is a word cloud summarising their responses to this free text question.

work load value low pay paper work age demanding stress hard
 support responsibility time family Retirement
 workload work much paperwork pay amount change
 enough career school paperwork respect hours money
 expectations ratio Retiring



8. REFERENCES

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