C·O·E CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH

Program Endorsement Brief

CHILDCARE WORKERS IN THE NORTH (GREATER SACRAMENTO) SUBREGION

North/Far North Center of Excellence
SEPTEMBER 2020

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COVID-19 Statement: This report includes employment projection data by EMSI. EMSI's projections are modeled on recorded (historical) employment figures and incorporate several underlying assumptions, including the assumption that the economy during the projection period will be at approximately full employment or potential output. To the extent that a recession or labor shock, such as the economic effects of COVID-19, can cause long-term structural change, they may impact the projections. At this time, it is not possible to quantify the impact of COVID-19 on projections of industry and occupational employment. Other measures such as unemployment rates and monthly industry employment estimates will reflect the most recent information on employment and jobs in the state and, in combination with input from local employers, may help validate current and future employment needs as depicted here.

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Summary

The North/Far North Center of Excellence for Labor Market Research prepared this report to provide regional labor market supply and demand data childcare workers in the North (Greater Sacramento) region. This report focuses on one middle-skill occupation - childcare workers (39-9011).[1] This report is intended to help determine whether there is demand in the local labor market that is not being met by the supply from existing community college programs.

Key findings include:

- The North (Greater Sacramento) region held 8,973 jobs for childcare workers in 2019. While jobs are projected to decline by 4.5% over the next five years, this may be due to the pandemic's impact.

- Over the next five years, childcare workers are projected to have 1,387 annual openings in the North (Greater Sacramento) region.

- Wages for childcare workers are typically below the North (Greater Sacramento) region's living wage of $13.18 per hour.

- Thirty-nine percent of incumbent childcare workers have education consistent with community college offerings (some college or associate degrees).

- Analysis of postsecondary awards in the North (Greater Sacramento) region shows that, on average, 599 awards were issued each year between the 2016-2017 and 2018-2019 academic years.

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[1] The COE classifies middle-skill jobs as the following:

- All occupations that require an educational requirement of some college, associate degree or apprenticeship;
- All occupations that require a bachelor's degree, but also have more than one-third of their existing labor force with an educational attainment of some college or associate degree; or
- All occupations that require a high school diploma or equivalent or no formal education, but also require short- to long-term on-the-job training where multiple community colleges have existing programs.

Introduction

The North/Far North Center of Excellence was asked to provide labor market information for a proposed program at a regional community college. This report focuses on the following Standard Occupational Classification (SOC) occupations and codes:

- Childcare workers (39-9011)

A review of related programs revealed the following program(s), and Taxonomy of Programs (TOP) code(s) are appropriate for inclusion in this report:

- Child Development/Early Care and Education (1305.00)

The corresponding Classification of Instructional Programs (CIP) code(s) are:

- Child Care Provider/Assistant (19.0709)

The SOC titles, SOC codes, and job descriptions from the Bureau of Labor Statistics (BLS) and O*Net OnLine are shown below.

Childcare Workers (39-9011)

Attend to children at schools, businesses, private households, and childcare institutions. Perform a variety of tasks, such as dressing, feeding, bathing, and overseeing play.

Occupational Demand

Exhibit 1 summarizes the five-year projected job growth for the selected occupations in the North (Greater Sacramento), North/Far North, and California.

Exhibit 1. Employment and projected demand, 2019-2024

Occupation	SOC	2019 Jobs	2024 Jobs	2019-2024 Jobs Change	2019-2024 Jobs % Change	2019-2024 Annual Openings
Childcare Workers	39-9011	8,973	8,570	(403)	(4.5%)	1,387
North (Greater Sacramento) region	TOTAL	8,973	8,570	(403)	(4.5%)	1,387
Childcare Workers	39-9011	11,557	10,898	(659)	(5.7%)	1,796
North/Far North region	TOTAL	11,557	10,898	(659)	(5.7%)	1,796
Childcare Workers	39-9011	155,948	151,891	(4,057)	(2.6%)	23,542
California	TOTAL	155,948	151,891	(4,057)	(2.6%)	23,542

Exhibit 2 compares the percent change in the number of jobs between 2014 through 2019 and the projected changes through 2024. The rate of change is indexed to the total number of jobs in 2014.
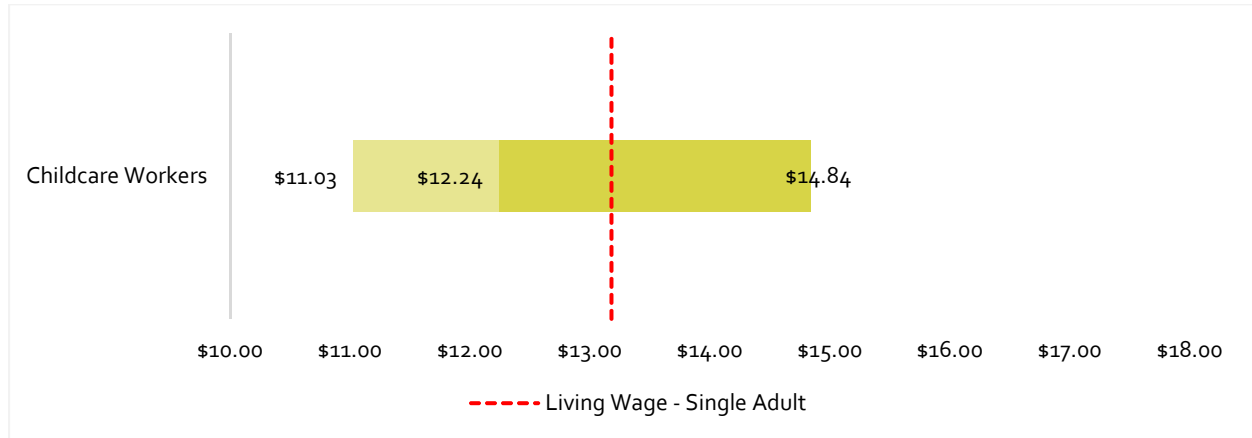
Exhibit 2. Changes in employment, 2014-2024
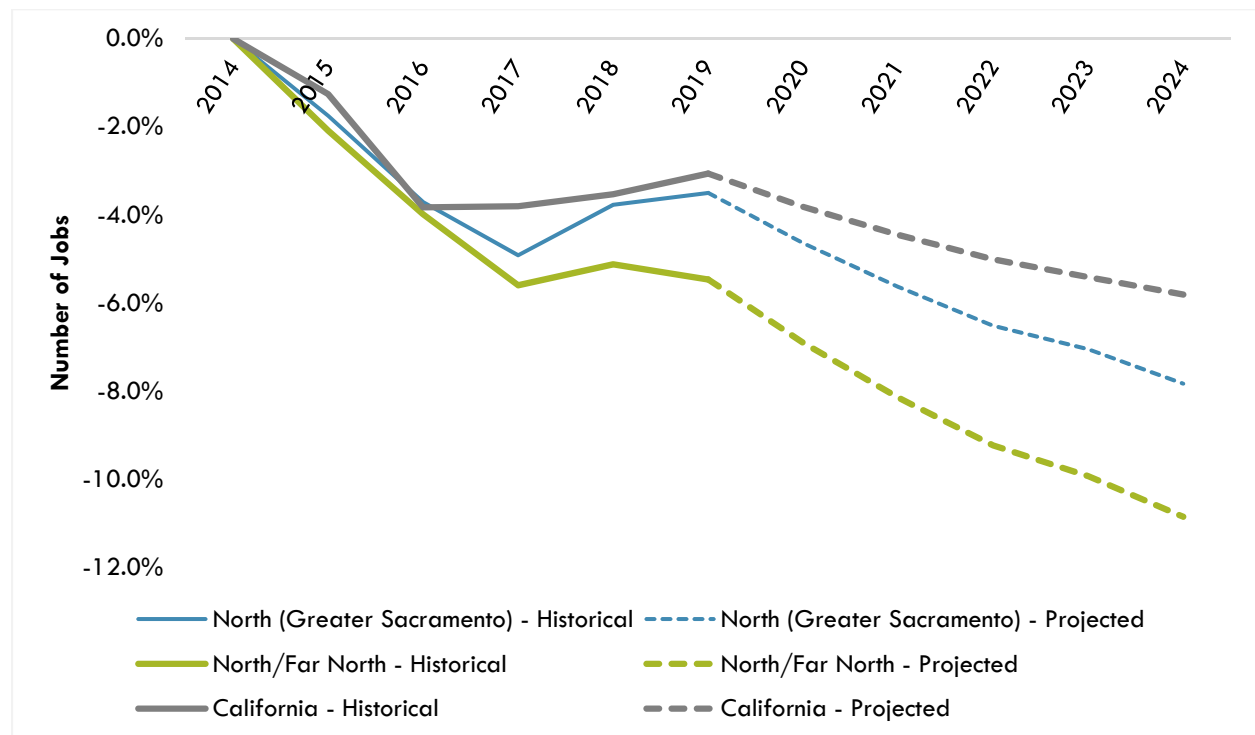
Wages

Exhibit 3 compares the entry-level, median, and experienced wages for the selected occupations to the North (Greater Sacramento) living wage for a single adult.[2]

Exhibit 3. Comparison of wages by occupation, North (Greater Sacramento) region

Job Postings

This section of the report analyzes recent data from online job postings (real-time LMI). Online job postings may provide additional insight into recent changes in the labor market that are not captured by historical data. Job postings data comes from Burning Glass Labor Insights and represents new listings posted online within the last year, from September 1, 2019, to August 31, 2020.

Occupations and Job Titles

Exhibit 4 details the number of online job postings for the selected occupations. Burning Glass identified a pool of 1,925 job postings for the selected occupations in the North (Greater Sacramento) region.

Exhibit 4. Number of job postings by occupation

Occupation	Job Postings	Share of Job Postings
Childcare workers (SOC 39-9011.00)	936	49%
Nannies (SOC 39-9011.01)	989	51%
Total Job Postings	1,925	100%

Exhibit 6 shows the top 10 job titles with the most job postings and the share of job postings. All 1,925 job postings included a job title.

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[2] Living wage is defined as the level of income a single adult with no children must earn to meet basic needs, including food, housing, transportation, healthcare, taxes, and other miscellaneous basic needs. The 25th-percentile and 75th-percentile hourly wages are used as proxy for entry-level and experienced-level wages.

Exhibit 6. Top jobs titles for selected occupations in the North (Greater Sacramento) region

Job Title	Job Postings	Share of Job Postings
Nanny	603	31%
Babysitter	422	22%
Child Care Assistant or Worker	251	13%
In-Home Care Provider	47	2%
Daycare Assistant	24	1%
Program Aide	13	1%
Kids Club Attendant	10	1%

Employers

Exhibit 7 shows the top 10 employers for job postings related to the selected occupations. Please note that 62% of job posting have been excluded because they did not include an employer. While most job postings did not include an employer's name, it's worth noting that most online job postings were for in-home care.

Exhibit 7. Top employers for selected occupations in the North (Greater Sacramento) region

Employer	Job Postings	Share of Job Postings
California Family Fitness	50	7%
CareInHomes	23	3%
The Center For Autism And Related Disorders, Inc	21	3%
Amazon	13	2%
Lifesteps Incorporated	11	2%
24 Hour Fitness	10	1%

Skills and Certifications

Exhibit 8 shows the top 10 specialized skills for the selected occupations. Please note that 58% of job posting have been excluded because they did not include a skill.
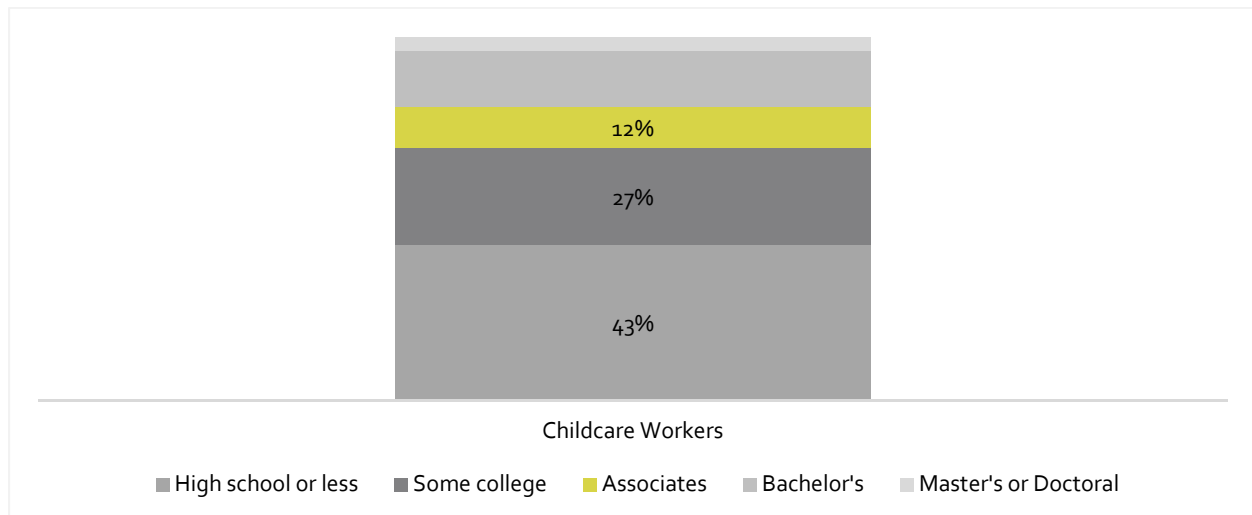
Exhibit 8. Top skills for selected occupations in the North (Greater Sacramento) region

Specialized Skill	Job Postings	Share of Job Postings
Child Care	1,146	60%
Babysitting	587	30%
Cardiopulmonary Resuscitation (CPR)	349	18%
Caregiving	289	15%
Meal Preparation	270	14%
Laundry	148	8%
Teaching	132	7%
Cleaning	115	6%
Scheduling	89	5%
Home Care	75	4%

Education and Training Requirements

The U.S. Census Bureau and Bureau of Labor Statistics collects data on the level of education achieved by workers employed in occupations. Exhibit 9 shows the national-level educational attainment of the current workforce in the selected occupations.

Exhibit 9. Educational attainment for selected occupations, 2018

Childcare Workers

■ High school or less ■ Some college ■ Associates ■ Bachelor's ■ Master's or Doctoral

The Bureau of Labor Statistics (BLS) uses a system to assign categories for entry-level education, work experience in a related occupation, and typical on-the-job training to each occupation for which the BLS publishes projections data. Exhibit 10 shows the entry-level job requirements for the selected occupations.

Exhibit 10. Typical education, training, and work experience for selected occupations

Occupation	Typical Entry-Level Education Required	Work Experience Required	Typical On-the-job Training Required
Childcare Workers	High school diploma or equivalent	None	Short-term on-the-job training

Educational Supply

Educational supply for an occupation can be estimated by analyzing the number of awards issued in related Taxonomy of Programs (TOP) or Classification of Instructional Programs (CIP) codes. Exhibit 11 shows the TOP and CIP codes related to the selected occupations.

Exhibit 11. Related TOP and CIP programs and codes for the selected occupations

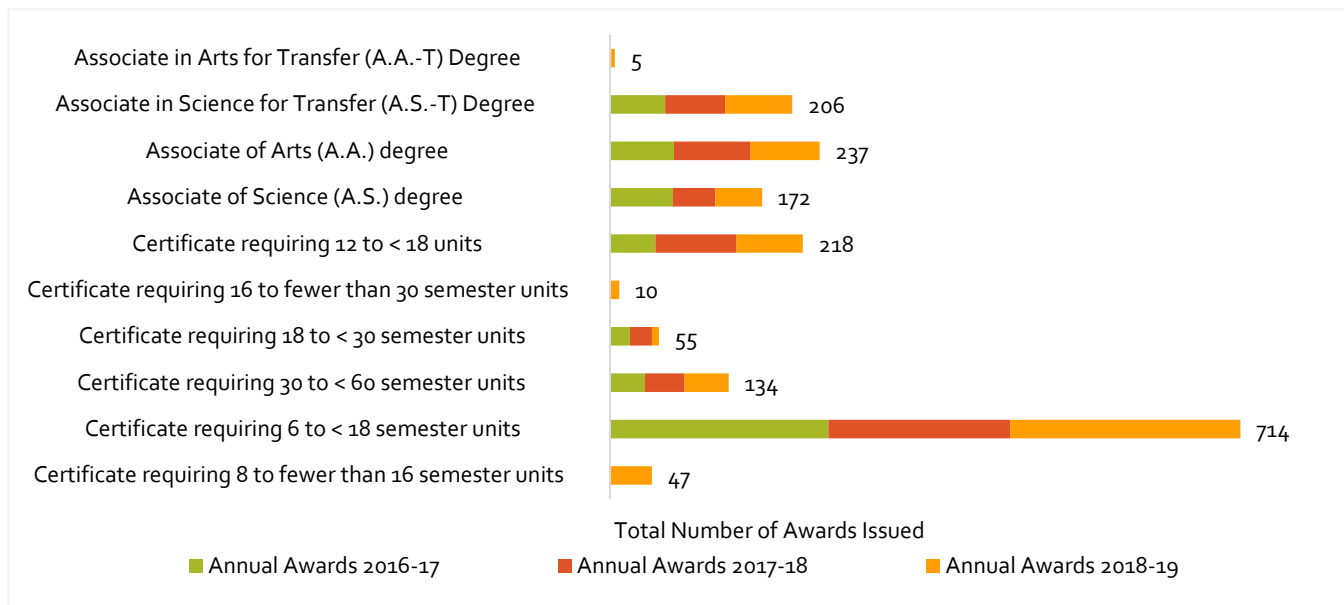| TOP Programs and Codes	Aligned CIP Programs and Codes
Child Development/Early Care and Education (1305.00)	Child Care Provider/Assistant (19.0709)

Community College Supply

Exhibit 12 compares the average number of certificates and degrees conferred by North (Greater Sacramento) region community colleges in the selected programs over the last three academic years.

Exhibit 12. Regional community college awards (certificates and degrees), 2016-17 through 2018-19

Program	College	Annual Awards 2016-2017	Annual Awards 2017-2018	Annual Awards 2018-2019	3-Year Annual Awards Average
Child Development/Early Care and Education (1305.00)	American River	127	134	185	149
	Cosumnes River	53	74	48	58
	Folsom Lake	92	113	131	112
	Lake Tahoe	1	7	8	5
	Sacramento City	24	41	50	38
	Sierra	129	79	51	86
	Woodland	31	36	84	50
	Yuba	107	88	105	100
	Totals	564	572	662	599

Exhibit 13 shows the distribution of issued awards by type.

Exhibit 13. Regional community college awards by type, 2016-17 through 2018-19

Award Type	Total
Associate in Arts for Transfer (A.A.-T) Degree	5
Associate in Science for Transfer (A.S.-T) Degree	206
Associate of Arts (A.A.) degree	237
Associate of Science (A.S.) degree	172
Certificate requiring 12 to < 18 units	218
Certificate requiring 16 to fewer than 30 semester units	10
Certificate requiring 18 to < 30 semester units	55
Certificate requiring 30 to < 60 semester units	134
Certificate requiring 6 to < 18 semester units	714
Certificate requiring 8 to fewer than 16 semester units	47

Total Number of Awards Issued

■ Annual Awards 2016-17   ■ Annual Awards 2017-18   ■ Annual Awards 2018-19

Other Postsecondary Supply

It is crucial to consider the supply from non-community college institutions in the region that provides training for the selected occupations.

No other postsecondary training providers in the North (Greater Sacramento) region offers a program in Child Care Provider/Assistant (19.0709).

Findings

- The North (Greater Sacramento) region held 8,973 jobs for childcare workers in 2019.

- Jobs for childcare workers are projected to decline by 4.5% over the next five years.

- Over the next five years, childcare workers are projected to have 1,387 annual openings in the North (Greater Sacramento) region.

- Wage data shows that childcare workers tend to earn less than the subregion's living wage. Reported earnings for childcare workers range from a low of $11 per hour for entry-level work to a high of nearly $15 per hour for experienced workers. The 2020 living wage for a single adult in the North (Greater Sacramento) region is $13.18 per hour. Wage data may reflect the part-time nature of childcare workers.

- According to real-time labor market information, there were 1,925 online job postings for childcare workers (including nannies) between September 1, 2019, and August 31, 2020. Nearly 70% of online job postings were for part-time care.

- A significant share of online job postings was for in-home childcare. Nearly 500 job postings listed a household or family name (such as the "Tangerini household" or "Nikki") as the employer.

- Thirty-nine percent of existing childcare workers have education consistent with community college offerings (some college or associate degrees).

- Analysis of postsecondary awards in the North (Greater Sacramento) region shows that, on average, 599 awards were issued each year between the 2016-2017 and 2018-2019 academic years. The most popular award conferred was a certificate requiring six- to fewer than 18-semester units.

Recommendations

- Based on a three-year average of annual awards in related North (Greater Sacramento) region programs (599 certificates and degrees) and projected yearly openings (1,387 openings), the region seems to have room for new training programs related to the occupation.

- The North/Far North Center of Excellence recommends moving forward with programmatic changes.

COE Recommendation		
Move forward with the program	Program is not recommended	Additional information needed
☒	☐	☐

Appendix A. Methodology and Sources

Occupations in this report were identified using O*Net. This report's findings were determined using labor market data from the Bureau of Labor Statistics (BLS), U.S. Census Bureau data from Emsi, and jobs posting data from Burning Glass.

Sources used for data analysis purposes in this report include:

- U.S. Department of Labor/Employment and Training Administration (DOL ETA) O*NET Online

- Burning Glass, Labor Insight/Jobs

- Economic Modeling Specialists, International (EMSI)

- California Employment Development Department, Labor Market Information Division (EDD, LMID)

- Bureau of Labor Statistics, Occupational Employment Statistics (OES)

- California Community Colleges Chancellor's Office, Cal-PASS Plus LaunchBoard

- Living Insight Center for Community Economic Development, Self-Sufficiency Standard Tool for California

- California Community Colleges Chancellor's Office Management Information Systems (MIS Data Mart)

- U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS)

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