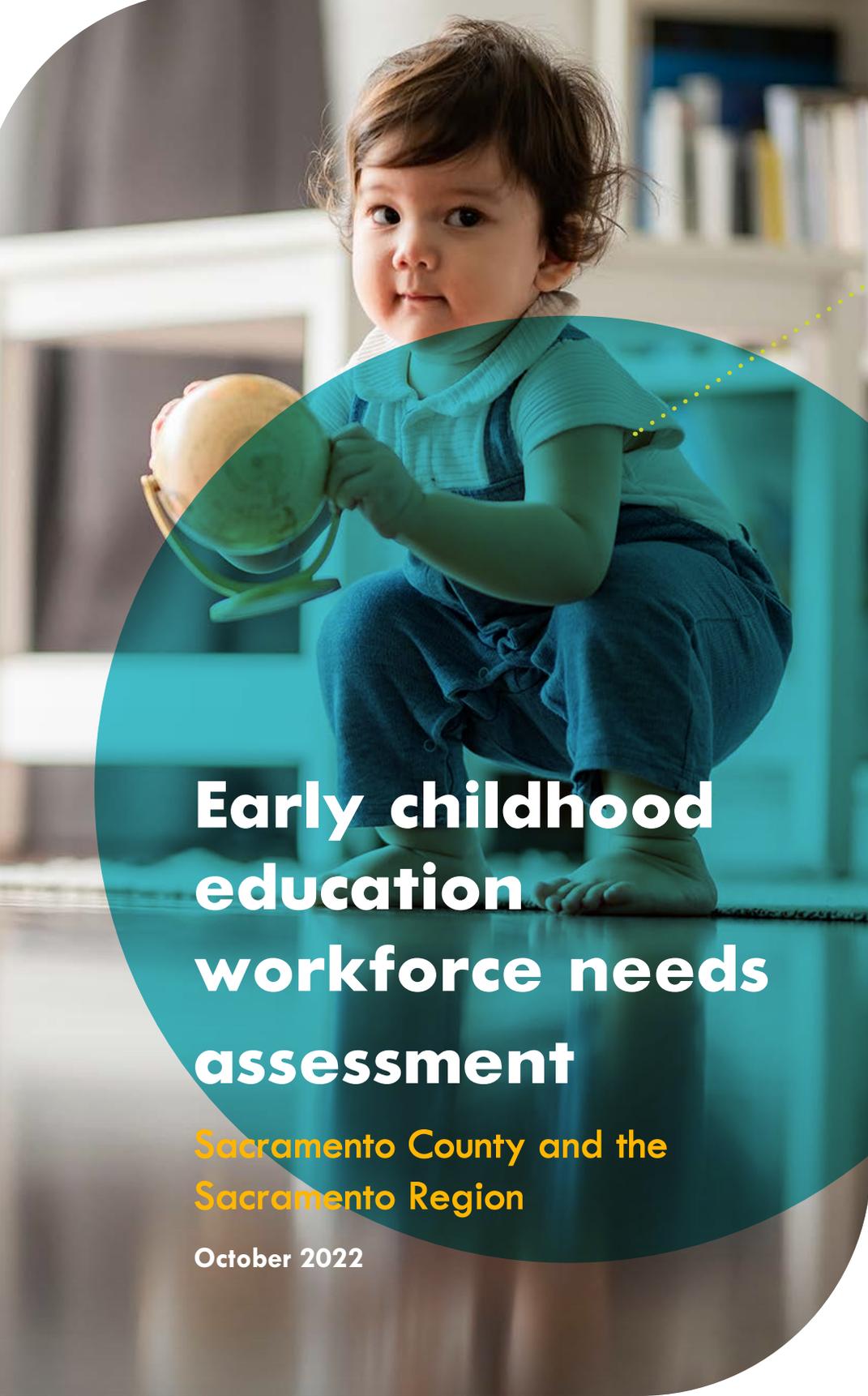




C·O·E

CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH



Early childhood education workforce needs assessment

Sacramento County and the
Sacramento Region

October 2022



valley vision



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City of
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Innovation & Economic Development

EXECUTIVE SUMMARY



Even before the onset of the Covid-19 pandemic in March 2020, California faced a child-care provision crisis. Many employers reported worsening recruitment and retention situations as the industry lost nearly 34% of its jobs in early 2020. By early 2022, the industry had recovered just 65% of the jobs lost during the pandemic, setting it on a 10-year path of job reductions. Many employers continue to report that licensed child care capacity goes unused because they cannot find qualified workers.

The city of Sacramento and the Sacramento Employment and Training Agency (SETA) convened the Early Learning and Child Care Task Force to coordinate efforts and address issues in the industry. A working group within the task force asked the Center of Excellence for the Greater Sacramento region and Valley Vision to undertake a study that illuminates major issues facing the early childhood education (ECE) workforce in Sacramento County and the Sacramento region. They include the need to increase the supply of the qualified ECE workforce, to consider ways to overcome existing disparities in access to education and advancement opportunities, and to support measures that will improve job quality and wages alongside workforce expansion.

The research resulted in the following main findings:

- The Sacramento County and the Sacramento regional ECE industry held steady or slightly increased during the pandemic. But its resiliency owed mostly to child care centers; family child care homes have seen an overall decline. In interviews, small businesses reported challenges in providing retention supports and advancement opportunities for workers. These findings point to the need to enhance training and permitting supports for small business operators and workforce and retention supports for employees.
- The supply of qualified workers must be increased to reverse the chronic workforce shortage facing the industry in the county and the region. ECE-licensed capacity to serve children was roughly the same in 2021 as it was in 2014. However, in 2020, Sacramento County's child care services industry had 21% fewer jobs than it did in 2010. The region's deficit was similar. Age demographics indicate that retirements pose a threat. The state's promise to triple the number of children served in transitional kindergarten could worsen shortages.
- The industry struggles to offer education, training, and advancement opportunities to workers and students in nonwhite groups, especially Latinas. Seven of 10 family child care home providers and center teachers are in nonwhite categories, but just 4 of 10 center directors are nonwhite. The report recommends enhancing supports for underrepresented students and workers in the ECE field to encourage advancement along education and career pathways. These supports can include mentorship, work-based learning opportunities, assistance with math and English, and alternative modes of delivery that better accommodate working students.
- Preschool teachers' median hourly earnings (\$16.86) are just 45% of the living wage for a one-adult, one-child household and only 47% of the wage levels of kindergarten teachers. ECE workforce stakeholders (i.e., workforce boards, community colleges, and other groups involved in training and education) should support the movement for universal prekindergarten and transitional kindergarten as a way to increase living-wage job opportunities within the field, in alignment with local and state advocates. These and other stakeholders will have to improve wages and working conditions for ECE workers who will occupy positions beyond the reach of these programs. Other mechanisms, including reimbursement reform and local public finance initiatives, merit attention from workforce development stakeholders.
- ECE and training assets are robust at the community colleges in the Sacramento region and at the California State University–Sacramento. These institutions have steadily increased the output of ECE certificates and degrees in the last decade. The region's community colleges have robust offerings that correspond to the job requirements stipulated under Title 5 regulations for state preschool. All eight community colleges have associate degrees for transfer to the California State University system, which positions them well to support the expansion of universal prekindergarten and transitional kindergarten. Additional investment in these and other teacher preparation programs is needed to address forecasted demand for ECE teacher positions that require bachelor's degrees and multiple-subject teaching credentials.
- Demographic data, employer interviews, and stakeholders concur that the industry has struggled to recruit younger entrants to the field. Workforce stakeholders will need to enhance marketing campaigns and outreach. In particular, the field and workforce developers should improve resources to help career explorers, students, and workers navigate education and training programs and permitting requirements. Existing resources are confusing and often conflicting. Materials and online resources must better help students and workers to navigate requirements and course sequences.

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INTRODUCTION



Even before the onset of the Covid-19 pandemic in March 2020, California faced a child-care provision crisis. Closure of child care facilities during the pandemic worsened the problem. Parents in critical infrastructure jobs suddenly had to scramble for care or stay home. Parents sent home to work remotely suddenly added full-time child care to their responsibilities.¹

The pandemic also wreaked havoc on the child care industry in California. Between March 2020 and April 2020, the industry lost nearly 34% of its jobs.² By January 2022, it had regained only 65% of those jobs. Particularly hard hit by the pandemic were home-based child care facilities, small businesses that were already in decline.³

Capacity has long been a challenge in the child care industry. In the Sacramento region, the number of licensed child care slots is equivalent to just about a third of the region's children age 5 and under. Some of this capacity goes unused because existing facilities cannot find qualified workers.

The state of California has sought to expand the number of children covered under state preschool and transitional kindergarten.⁴ During the pandemic, state and local agencies channeled federal recovery funds into state preschool and other child care facilities to keep them open and to accommodate safety protocols.⁵ The effort may have modestly increased overall capacity, but in the Sacramento region and throughout California, the long-term trend of child care job reductions persists.

In the Sacramento region, key stakeholder groups, including the Local Child Care and Development Planning Council housed at the Sacramento County Office of Education (SCOE), have established workforce strategies to address shortages and job quality.⁶ During the pandemic, the city of Sacramento laid out plans to use federal recovery funds to create training and pipeline development to support new entrants to the child care field.⁷

Early Learning and Child Care Task Force

To understand child-care services challenges, stakeholder groups joined with the City of Sacramento and the Sacramento Employment and Training Agency (SETA) to establish the Early Learning and Child Care Task Force.⁸ A working group, consisting of task force members, includes the following key partners:

- SETA (co-lead)
- City of Sacramento (co-lead)
- Child Action, Inc. (Alternative Payment and Resource & Referral Program for Sacramento County)
- SCOE (Local Child Care and Development Planning Council)
- First5 Sacramento
- Sacramento region community colleges
- California State University–Sacramento

1. Kristin Schumacher, "California's Economic Recovery Starts with Child Care," California Budget & Policy Center, 2021, https://calbudgetcenter.org/app/uploads/2021/02/accessible_FS-Child-Care-Economic-Infrastructure.pdf.

2. See the industry analysis of Current Employment Statistics below.

3. California Child Care Resource & Referral Network, "Decline of Licensed Family Child Care Home Supply, 2008–2017," <https://rrnetwork.org/assets/general-files/Decline-in-FCC-Supply-All-Regions.pdf>.

4. Edgar Cabral, "The 2022–2023 Budget: State Preschool," Legislative Analyst's Office, 2022, <https://lao.ca.gov/reports/2022/4555/State-Preschool-022222.pdf>.

5. Kristin Schumacher, "Moving Beyond Relief for California Child Care," California Budget & Policy Center, 2022, <https://calbudgetcenter.org/resources/moving-beyond-relief-for-california-care/>.

6. Sacramento County Office of Education, *Sacramento County Early Learning Roadmap: Prenatal Through Age Eight, 2017–2022*, 2016, https://www.sacramentocountyearlylearning.org/admin/files/resource/154/early_learning_roadmap.pdf.

7. For example, Sacramento County designated \$1 million of its CARES Act funds to bolster child care services. See <https://agendanet.saccounty.gov/BoardOfSupervisors/Meetings/ViewMeeting?id=6753&doctype=2>.

8. The task force predates the pandemic. The research scope was developed with a working group of the task force in early 2022 to assess the pandemic's short-term impacts and to examine long-term trends.

The Center of Excellence for the Greater Sacramento region and Valley Vision were asked to undertake the study and write a report detailing the needs of the ECE workforce. Together with the working group of the task force, the research team developed the scope of a study on the workforce challenges facing the child care industry in Sacramento County and the Sacramento region. The COE led data analysis of facility and capacity trends, population trends, industry employment trends, jobs counts, workforce demographics, workforce educational attainment, and wages. The COE also led research on regulatory workforce requirements, local education and training programs, and average awards and awards trends by program and institution.

The research included interviews with employers about workforce needs and a survey of current and former child care workers in Sacramento County about working conditions. These elements of the study were led by Valley Vision's 21st Century Workforce team, including Renee John, director of Workforce Development; Yzabelle Dela Cruz, project manager; Angelina Olweny, project associate; and Danielle Susa, project associate. Nghia Nguyen also contributed to the study.

Task force working group partners are listed in Appendix A.

Overview and methodology

The report provides context for and data relevant to labor market and workforce issues in the early childhood education (ECE) industry. It begins by describing the organization of the industry, including types of facilities and the regulatory environment that governs licensed and license-exempt facilities. It then covers historical trends of the industry between 2014 and 2021 by examining the number of licensed facilities, including centers and family child care homes, and their capacity (slots).

A comparison of the population of children ages 0 to 5 to the number of licensed spaces between 2014 and 2021 provides context for the overall need for child care services and the significance of license-exempt child care.

Several measurements of the historical size and performance of ECE employment are presented, along with a 10-year annual analysis that shows long-term trends and monthly employment estimates that highlight short-term impacts of and recovery from the pandemic.

An estimate of jobs numbers in the child care industry relies on research from the Center for the Study of Child Care Employment (CSCCE) at UC–Berkeley. The data include estimates of jobs in licensed child care centers and licensed family child care homes, including estimates in specific job categories.

Demographic data from the CSCCE on the racial composition of specific jobs shed light on phenomenon that may contribute to wealth disparities among groups of workers. Demographic data illuminating the age breakdown of the workforce emphasizes retirement threats and recruitment challenges.

Educational attainment data for the ECE workforce include data that illustrate opportunities to support a segment of the workforce to advance with additional education and training.

Wage data offer insights into job quality and earning potential. The analysis compared the wages of the ECE workforce to those of kindergarten and elementary school teachers and compared both to the living wage and the self-sufficiency wage.

The report details education and training requirements under the major regulatory frameworks, and it inventories community college and university programs in the Sacramento region. The report also provides trend data on production of certificates and degrees to indicate the number of trained workers entering into and advancing through the industry's workforce ranks. In this context, the report highlights the state's universal prekindergarten movement and the state's plan to expand transitional kindergarten to all 4-year-olds in California.

Finally, the report includes a summary of findings from interviews with ECE employers on topics including hiring challenges, retention strategies, and pandemic impacts. It also covers findings from a survey of more than 200 current and former child care workers that covers wages and benefits, working conditions, and reasons to remain in or leave the field.

The study's research and analysis methods are detailed in Appendix B.



REGULATORY OVERVIEW



The organization of the child care industry in California depends significantly on the regulatory frameworks that govern operations and workforce requirements and qualifications.⁹ Each framework has rules for the following:

- Staff qualifications—teacher ages and required education units
- Staffing requirements—adult-to-child ratios, supervisors, teachers, assistants
- Food service—preparation, dietary guidelines, permitting
- Health—first aid, illness notifications
- Safety—staff background checks, discipline guidelines, emergency preparedness
- Environmental—buildings, grounds, activity spaces

Other reports and state agency websites detail these requirements. The section below on workforce summarizes required qualifications for jobs categories in centers and family child care homes. Head Start, Title 5, and Title 22 affect qualification requirements for jobs categories.

Many facilities receive multiple funding sources and are subject to more than one regulation.¹⁰ The research does not comprehensively cover all funding sources, such as CalWORKS, General Child Care and Development, special education, home visiting programs, migrant programs, and Local First 5/Proposition 10.¹¹

The three following regulatory frameworks govern child care and affect jobs qualifications in California.

Title 22

The California Department of Social Services (CDSS) issues licenses for and provides oversight of publicly and privately funded child care centers and family child care homes. These centers and homes may include tuition/fee-based facilities, nonprofit organizations, and faith-based organizations.¹² Title 22 is the baseline for all licensed child care facilities in California, including state preschools and Head Start programs.

Title 5

Centers in public school districts with state preschool and transitional kindergarten programs are subject to Title 5 regulations. Like facilities receiving Head Start funds, facilities under Title 5 have requirements for facilities, staff, and service provision in addition to Title 22 requirements for facilities, staff, and service provision. Title 5 also governs programs under General Child Care, a state program. In summer 2021, state oversight of these programs began moving from the California Department of Education (DOE) to the CDSS. Income and other criteria established by the state dictate eligibility for programs under Title 5.¹³

Head Start

Head Start is a program of the U.S. Administration for Children and Families under the U.S. Department of Health and Human Services. The program funds local entities that administer the funds and run child care centers according to federal, state, and local regulations. A statewide entity, the California Head Start State Collaboration Office (CHSSCO), coordinates efforts for local Head Start offices.¹⁴ In 2021, the coordinating body moved to the California Department of Social Services. Families and children meet federal poverty income, public assistance, or homeless eligibility criteria to qualify for Head Start. In Sacramento County, the Sacramento Employment and Training Agency (SETA) administers Head Start.¹⁵ Head Start is subject to facilities, staff, and services requirements in addition to Title 22 facilities, staff, and services requirements.

9. The research does not emphasize funding, and it covers neither CalWORKS, the program funded by Temporary Assistance for Needy Families (TANF) under the U.S. Department of Health and Human Services, nor General Child Care Funding. See, California Child Care Resource & Referral Network (CCCRRN), "CalWORKS Child Care," 2019, <https://rrnetwork.org/assets/general-files/CalWORKs.pdf>; "State Subsidized Child Care Payment Types," <https://rrnetwork.org/assets/general-files/Subsidy-Payment-Types.pdf>; and Hannah Melnick et al., "Understanding California's Early Care and Education System," Learning Policy Institute, 2017, https://learningpolicyinstitute.org/sites/default/files/product-files/Understanding_CA_Early_Care_Education_System_REPORT.pdf.

10. Hannah Melnick et al., "Understanding California's Early Care and Education System," Learning Policy Institute, 2017, pp. 9–12, https://learningpolicyinstitute.org/sites/default/files/product-files/Understanding_CA_Early_Care_Education_System_REPORT.pdf.

11. For detailed summaries of regulations, see CCCRRN, "State Preschool Facilities Reference Guide Requirements and Regulations," https://rrnetwork.org/assets/general-files/Licensing_Comparison.pdf, and CCCRRN, "Regulation and Licensing of Child Care Programs in California," <https://rrnetwork.org/assets/general-files/Title-5-Title-22-Comparison-Chart.pdf>.

12. California Department of Social Services, Community Care Licensing, "Public Information and Resources," <https://www.cdss.ca.gov/inforesources/child-care-licensing/public-information-and-resources>.

13. CCCRRN, "Subsidies & Regulations," 2021, <https://rrnetwork.org/policy/subsidies-regulations>.

14. California Department of Education, "California Head Start State Collaboration Office," 2022, <https://www.cde.ca.gov/sp/cd/re/chssco.asp>.

15. Sacramento Employment and Training Agency (SETA), "Children and Family Services," <https://www.seta.net/children-family-services/>.

INDUSTRY OVERVIEW



For the purposes of this report, ECE industry facilities are broadly grouped on the basis of type and relevant regulatory framework. This division does not account for funding, which many facilities receive from more than one source, but it does allow for understandable categories and parsing of data for analysis. The analysis follows the organization of data from the California Child Care Resource & Referral Network and the Center for the Study of Child Care Employment at UC–Berkeley.¹⁶ The broad categories of child care facilities described here include the following:¹⁷

- **Child care centers**—Head Start, state preschool, transitional kindergarten, and private and nonprofit facilities
- **Family child care homes**—small and large home-based businesses
- **License-exempt facilities**—gyms, crisis and homeless centers, and residences of family, friends, and neighbors

The report includes data only for child care centers and family child care homes.

Child care centers

Child care centers are sometimes called “nursery schools” or “preschools.” Centers are facilities that provide care for infants, toddlers, preschoolers, and school-age children for all or part of the day. Child care centers are licensed facilities that operate in a commercial building, a school facility, or a church. Data from the California Department of Social Services indicate that centers range in size from fewer than 10 to more than 200 spaces.¹⁸

Head Start

SETA oversees more than 100 Head Start facilities in Sacramento County, including many at school districts. These facilities are governed by federal regulations and receive federal funding. Early Head Start covers children from birth to age 3. Head Start preschool covers children ages 3 to 5. Head Start preschool accounts for the majority of Head Start participation. The programs include home visiting programs and programs for special education students, migrant and seasonal workers, and Native Americans. Head Start also provides wraparound support, including parent education, health and nutrition services, and family services. Participation in Head Start programs requires meeting federal poverty guidelines.

State preschool and transitional kindergarten

Local Education Agencies (LEA) typically administer or operate state preschool programs. Other child care facilities have contracts for state preschool and receive state funding. These programs have eligibility criteria based on state median income levels. Transitional kindergarten is for 4-year-old children who are not eligible for kindergarten. There are no income eligibility criteria for transitional kindergarten.¹⁹

Private child care centers

Private child care centers include private-pay (tuition/fee-based) for-profit and nonprofit facilities. Many faith-based organizations and community-based organizations fall into this category. These organizations may accept subsidy vouchers from CalWORKS, the California Alternative Payment Program, and other state sources.

16. School district sites, for example, may operate state preschool and Head Start programs. Private-pay (tuition/fee-based) facilities may accept vouchers funded by CalWORKS. Other reports cite inventory funding sources for and activities of each organization. See Hannah Melnick et al., “Understanding California’s Early Care and Education System,” Learning Policy Institute, 2017, https://learningpolicyinstitute.org/sites/default/files/product-files/Understanding_CA_Early_Care_Education_System_REPORT.pdf.

17. The data collected by Child Action and the California Child Care Resource & Referral Network classify sites and licensed capacity in these broad categories. Data coding relates to each facility’s primary regulatory governing body and funding source.

18. California Department of Social Services, “Download Data,” <https://www.cdld.dss.ca.gov/carefacilitysearch/DownloadData>.

19. Hannah Melnick et al., “Understanding California’s Early Care and Education System,” pp. 2–6, 43, 52.

Family child care homes

The California Department of Social Services issues licenses for small family child care businesses that serve up to eight children, depending on their ages. These in-home businesses are operated by the owner/provider, often a parent. Large family child care homes serve up to 14 children, again depending on the ages of the children, and are operated by the owner/provider and at least one adult assistant. Title 22 regulations require assistants to ensure student-to-teacher ratio criteria are met. These businesses may accept subsidy vouchers.

License-exempt facilities

License-exempt facilities probably provide most child care, but because data on their activities are not readily available, they are not the focus of this report.²⁰ Family, friends, and neighbors play a crucial role with respect to equity and cultural considerations.²¹ Arrangements with these parties, including parent cooperatives, are exempt from licensing requirements, though they may accept subsidy vouchers, in which case they are required to participate in the state's TrustLine registry. Child care programs in businesses like gyms whose primary business is not child care are also exempt, as are crisis center programs and homeless programs.²² Some after-school child care programs are exempt from child care licensing but not from state education regulations.²³ Families receiving CalWORKS and other state subsidy payments may choose license-exempt providers.²⁴

Exhibit 1 summarizes the main features of child care centers, family child care homes, and license-exempt facilities. It includes a sample of actual facilities and descriptions of facilities for each category.



20. Analyses for local and state planning often compare potential licensed capacity to population figures. The data indicate that licensed capacity would accommodate fewer than a third of children ages 0 to 5.

21. California Department of Social Services, *A Report by the Rate and Quality Workgroup*, August 2022, <https://www.cdss.ca.gov/inforesources/child-care-and-development/rate-reform-and-quality>.

22. Some facilities engaged in these activities may be licensed and may accept public subsidies. These facilities are included as examples.

23. CCCRRN, "Child Care Licensing and License-Exempt Providers," 2013, https://rrnetwork.org/assets/general-files/1 - Child_Care_Licensing_and_License-Exempt_Providers.pdf, and CCCRN, "License-Exempt Child Care," 2019, <https://rrnetwork.org/assets/general-files/License-exempt-care.pdf>.

24. Hannah Melnick et al., "Understanding California's Early Care and Education System," Learning Policy Institute, 2017, https://learningpolicyinstitute.org/sites/default/files/product-files/Understanding_CA_Early_Care_Education_System_REPORT.pdf, pp. 39–41, 46.

Exhibit 1. Summary matrix of child care industry, including notes on and examples of child care centers, family child care homes, and license-exempt child care facilities

Facility category	Facility type	Administration, program, regulatory notes	Sacramento County facility examples
Centers	Head Start	<ul style="list-style-type: none"> • Subject to Federal Head Start Bureau guidelines that go beyond Title 22 guidelines • Subject to federal poverty guidelines • SETA is the local administrator in Sacramento County and operates dozens of facilities • Family services for jobs training, health care • Early Head Start (birth to age 3) • Head Start preschool (age 3 to 5) 	<p>SETA oversees more than 100 Head Start facilities in the county, and SETA Head Start subcontracts with</p> <ul style="list-style-type: none"> • Sacramento County Office of Education (SCOE) • Twin Rivers Unified • Elk Grove Unified • Sacramento City Unified • San Juan Unified • Women’s Civic Improvement Club • River Oak Center for Children
	Local Education Agencies (LEAs)	<ul style="list-style-type: none"> • State preschool and transitional kindergarten • Governed by Title 5 regulations in addition to Title 22 regulations • Head Start programs operated by many school districts 	<p>Multiple sites are operated by school districts, including</p> <ul style="list-style-type: none"> • Elk Grove Unified • Twin Rivers Unified • Sacramento County Unified • Galt Joint Union • San Juan Unified • Sacramento City Unified
Centers	Private	<ul style="list-style-type: none"> • Private-pay (tuition-based) facilities • Churches, nonprofits • Governed by the California Department of Social Services and Title 22 • May also be subject to federal regulations and Title 5 if funding is received from CalWORKS, the General Child Care fund, Head Start, or state preschool 	<p>Private-pay facilities include</p> <ul style="list-style-type: none"> • Cadence Education • Montessori schools • Merryhill School <p>Nonprofits, faith-based facilities include</p> <ul style="list-style-type: none"> • Bradshaw Christian School • Trinity Church, Trinity Tots
Family child care homes	Private	<ul style="list-style-type: none"> • In-home child care businesses • Licensed designate family homes (large homes serve up to 14 children; small ones, up to 8 children) • Governed by the California Department of Social Services and Title 22 • May accept vouchers from CalWORKS or other sources 	In-home businesses
License-exempt facilities	Informal	<ul style="list-style-type: none"> • Informal arrangements • Providers receiving subsidies required to participate in state’s TrustLine registry • Probably account for the majority of child care activities • Data on these activities generally unavailable 	<ul style="list-style-type: none"> • Residences of family, friends, and neighbors • Gyms or other operations where child care is not the main business • After-school programs (already under state education regulations) • Crisis nurseries • Homeless respite care

FACILITY AND CAPACITY TRENDS



The research covers the size and performance of the industry marketplace by examining the number of facilities, including centers and family child care homes, and their licensed capacity (slots) between 2014 and 2021.

Facility trends

Totals in 2017 and 2019 indicate that the overall reduction in the number of child care facilities predated the pandemic. The number of child care centers and family child care homes increased between 2019 and 2021 in the county and the region (Exhibit 2). The state, by contrast, saw a consistent decrease in the number of child care centers and family child care homes in each year between 2014 and 2021.

Facility numbers in the county and the region fell in the years between 2014 and 2019. Between 2019 and 2021, the trend had reversed course (Exhibit 3). In 2021, facility numbers in Sacramento County were just 1.9% lower than in 2014. After 2019, facility numbers increased in the region, but by 2021, they were still 7.6% lower than in 2014. In the state, overall facility numbers continued to decrease after 2019, and in 2021 they were 14.1% lower than in 2014.

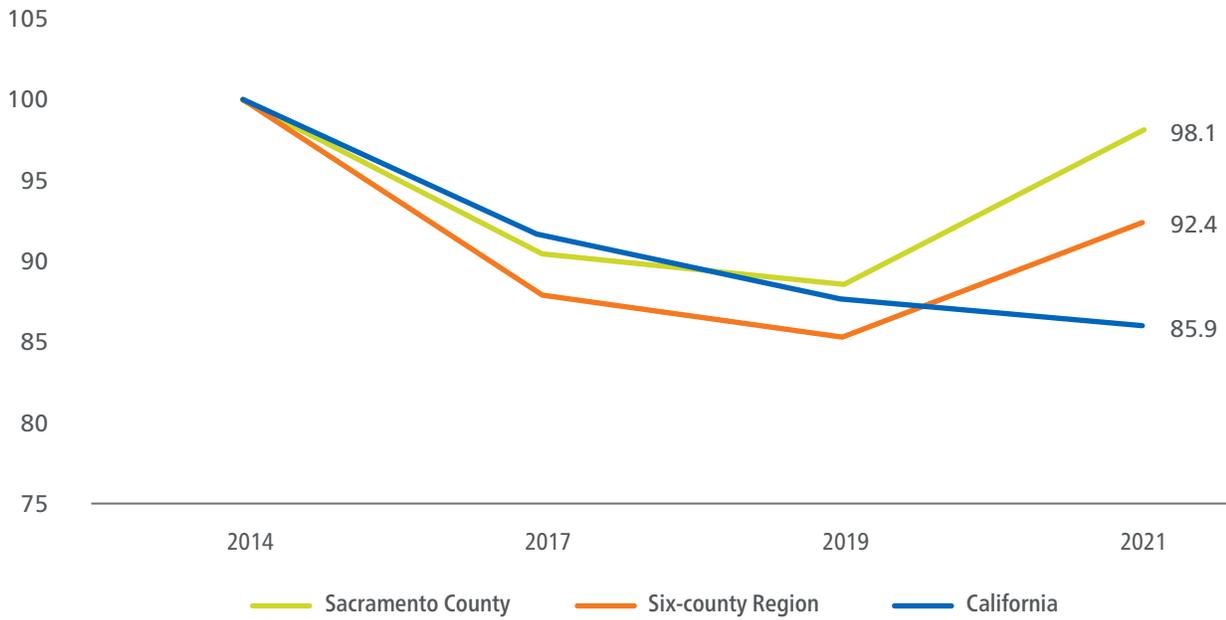
Between 2014 and 2021, the overall reduction in the number of facilities in the county and the region owed to the reduction in family child care homes. The number of centers increased by 10.5% in the county and by 7.1% in the region. Meanwhile, the county saw a 6% reduction in family child care homes, and the region saw a 12.8% reduction.

Exhibit 2. Totals and trends, licensed early childhood facilities, child care centers and family child care homes, Sacramento County, Sacramento region, California, 2014–2021, 2019–2021

	2014	2017	2019	2021	% change 2014–2021	% change 2019–2021
Sacramento County						
Child care centers	466	475	473	515	10.5%	8.9%
Family child care homes	1,445	1,254	1,217	1,359	-6.0%	11.7%
Total facilities	1,911	1,729	1,690	1,874	-1.9%	10.9%
6-county Sacramento Region						
Child care centers	802	790	793	859	7.1%	8.3%
Family child care homes	2,269	1,911	1,828	1,979	-12.8%	8.3%
Total facilities	3,071	2,701	2,621	2,838	-7.6%	8.3%
California						
Child care centers	11,230	10,866	10,654	10,554	-6.0%	-0.9%
Family child care homes	30,701	27,528	26,173	25,478	-17.0%	-2.7%
Total facilities	41,931	38,394	36,827	36,032	-14.1%	-2.2%

Sources: California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool>; Child Action, Inc.

Exhibit 3. Trend, total number of licensed early childhood facilities, child care centers and family child care homes, Sacramento County, Sacramento region, California, 2014–2021, indexed to 2014



Source: California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool>; Child Action, Inc.

Capacity trends

Exhibit 4 and Exhibit 5 display trends in child care capacity (number of spaces, often referred to as “slots”).²⁵

The county and region experienced a general reduction in capacity through 2019 (Exhibit 4). In 2021, the county and the region regained the capacity levels of 2014 (Exhibit 5). The county had 1.6% more spaces than in 2014. The region had less than 1% fewer spaces than in 2014. In 2021, the state had 6.6% fewer spaces than in 2014.

Between 2014 and 2019, child care centers were responsible for shoring up capacity losses in the county and the region. During the pandemic, between 2019 and 2021, family child care homes comprised three-quarters of increased capacity. Family child care homes added 11.7% capacity in the county and 7.9% in the region. Child care center capacity also increased in the county and the region, but only between 1% and 2%.

The state experienced consistent reductions in capacity between 2014 and 2021, and between 2019 and 2021, in all categories, except for infant capacity (Exhibit 5). Between 2014 and 2021, the state had an 8% increase in infant capacity.

Note on the data:

Capacity (number of “slots”) indicates number of potential spaces for which a state license is issued, not the actual count of children served.

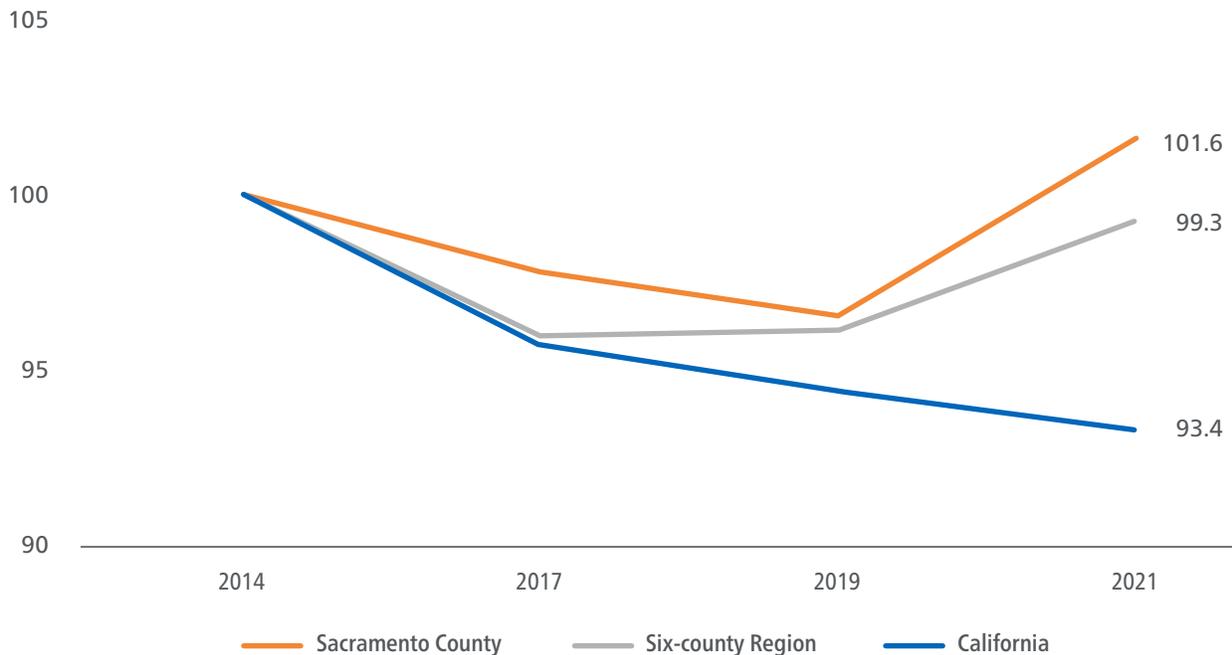
25. Please note the terms “capacity,” “spaces,” and “slots” are used interchangeably.

Exhibit 4. Totals and trends, licensed early childhood capacity (slots), child care centers and family child care homes, Sacramento County, Sacramento region, California, 2014–2021, 2019–2021

	2014	2017	2019	2021	% change 2014–2021	% change 2019–2021
Sacramento County						
Center spaces	24,749	25,638	25,391	25,938	4.8%	2.2%
Infant (0–23 months)	2,996	3,266	2,849	2,930	-2.2%	2.8%
Preschool (2–5 years)	21,753	22,372	22,542	23,008	5.8%	2.1%
Family child care homes	14,176	12,456	12,202	13,626	-3.9%	11.7%
Total spaces	38,925	38,094	37,593	39,564	1.6%	5.2%
6-county Region						
Center spaces	38,699	39,589	40,288	40,707	5.2%	1.0%
Infant (0–23 months)	4,454	4,725	4,502	4,615	3.6%	2.5%
Preschool (2–5 years)	34,245	34,864	35,786	36,092	5.4%	0.9%
Family child care homes	22,882	19,558	18,954	20,458	-10.6%	7.9%
Total spaces	61,581	59,147	59,242	61,165	-0.7%	3.2%
California						
Center spaces	578,282	569,905	570,226	561,652	-2.9%	-1.5%
Infant (0–23 months)	44,404	47,443	47,497	47,958	8.0%	1.0%
Preschool (2–5 years)	533,878	522,462	522,729	513,694	-3.8%	-1.7%
Family child care homes	312,277	283,496	271,101	270,456	-13.4%	-0.2%
Total spaces	890,559	853,401	841,327	832,108	-6.6%	-1.1%

Sources: California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool>; Child Action, Inc.

Exhibit 5. Trend, total capacity (slots) in licensed early childhood facilities, child care centers and family child care homes, Sacramento County, Sacramento region, California, 2014–2021, indexed to 2014



Sources: California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool>; Child Action, Inc.

Sacramento County: Facility numbers and capacity

The analysis used detailed data for a recent month to highlight overall facility numbers and capacity in Sacramento County's child care centers and family child care homes. It broke down the data by children's ages and by funding sources.

Exhibit 6 shows site numbers for and capacity of licensed child care centers and family child care homes in Sacramento County in May 2022. There were 1,788 total sites and 39,307 total spaces. Though three-quarters of sites are family child care homes (1,354 sites), 65.2% of total capacity is in the county's 434 child care centers (25,625 spaces).²⁶ Family child care homes account for 34.8% of total capacity (13,682 spaces).

Exhibit 6. Sites and capacity (slots), total and percent of total, child care centers and family child care homes, Sacramento County, May 2022

Facility type	Sites	Sites % of total	Capacity	Capacity % of total
Child care centers	434	24.3%	25,625	65.2%
Family child care homes	1,354	75.7%	13,682	34.8%
Total	1,788	100.0%	39,307	100.0%

Source: Child Action, Inc., Sacramento County

Child care centers: Numbers and capacity

The majority of child care center capacity is designated for preschool-age children (22,679 slots, 88.5% of total), including centers that serve only preschool-age children (14,083 slots, 55% of total capacity) and centers that serve a mix of infants and preschool-age children (8,596 preschool slots, 35% of total capacity) (Exhibit 7).

In the context of infant capacity, the number of licensed spaces (2,946) represents just 11.5% of total capacity. Most infant capacity (2,713 spaces, 10.6% of total capacity) is in centers that also serve preschool-age children. Just under 2% child care centers (8 sites) are designated for infants only (233 spaces, 0.9% of total capacity).

A large majority of licensed spaces (**88.5%** of total capacity) in child care centers in Sacramento County are for preschool-age children.

Just **11.5%** of total capacity is designated for infants, 0–23 months old.

Exhibit 7. Infant and preschool child care center sites and capacity (slots), total and percent of total, Sacramento County, May 2022

Age group served	Sites	Site % of total	Capacity	Capacity % of total
Infant only (0–23 months)	8	1.8%	233	0.9%
Preschool only (2–5 years)	297	68.4%	14,083	55.0%
Infant and preschool (0–5 years)*	129	29.7%	11,309	44.1%
Total	434	100.0%	25,625	100.0%

Source: Child Action, Inc., Sacramento County

* In centers serving a mix of infants and preschool-age children, capacity is split as follows: 8,596 preschool slots and 2,713 infant slots.

26. The number of centers does not include sites that cater to school-age children.

Most child care centers (248 sites, 57.1% of total) in Sacramento County are funded by private pay (are fee-based) and do not receive a majority of their funding from public sources (Exhibit 8). These centers account for 16,982 spaces (66.3% of total). In May 2022, there were 186 centers (42.9% of total) directly receiving at least one source of public funding. These centers have 8,643 spaces (33.7% of total capacity).

Of licensed center spaces in Sacramento County, **66%** are in private-pay facilities, which are funded directly by fees and tuition.

Exhibit 8. Publicly funded and private-pay child care center sites and capacity (slots), total and percent of total, Sacramento County, May 2022

Funding source type	Sites	Site % of total	Capacity	Capacity % of total
Publicly funded	186	42.9%	8,643	33.7%
Private pay	248	57.1%	16,982	66.3%
Total	434	100.0%	25,625	100.0%

Source: Child Action, Inc., Sacramento County

Facilities receiving federal Head Start and state preschool funding make up the vast majority of publicly funded child care centers and capacity in Sacramento County (Exhibit 9). Sites receiving a combination of federal and state funds (32 sites, 17% of total), have 23.5% (2,037 spaces) of total capacity (8,643 spaces). Just 7 of 186 sites (3.8% of total) receive most of their funding from the state’s General Child Care (GCC) fund.

Sites receiving mostly Head Start and state preschool funding comprise **77%** of the total subsidized child care center capacity in Sacramento County.

Exhibit 9. Publicly funded child care center sites and capacity (slots), funding source detail, Sacramento County, May 2022

Funding source	Site	Site % of total	Capacity	Capacity % of total
GCC fund only	7	3.8%	286	3.3%
Head Start only	65	34.9%	2,659	30.8%
State preschool only	53	28.5%	2,092	24.2%
Head Start + state preschool	36	19.4%	1,855	21.5%
GCC fund + Head Start	2	1.1%	97	1.1%
GCC fund + state preschool	19	10.2%	1,252	14.5%
All three funding sources	4	2.2%	402	4.7%
Total	186	100.0%	8,643	100.0%

Source: Child Action, Inc., Sacramento County

Family child care homes: Numbers and capacity

In May 2022, Sacramento County had 1,354 family child care homes with a capacity of 13,682 spaces (Exhibit 10). The 879 small child care homes (64.9% of total) had 7,032 spaces (51.4% of total). There were fewer large child care homes (475 sites, 35.1% of total), but they had nearly the same capacity (6,650 spaces, 48.6% of total) as small child care homes.

Exhibit 10. Small and large family child care homes, sites and capacity (spaces), total and percent of total, Sacramento County, May 2022

Type	Sites	Site % of total	Capacity	Capacity % of total
Small family child care home	879	64.9%	7,032	51.4%
Large family child care home	475	35.1%	6,650	48.6%
County Total	1,354	100.0%	13,682	100.0%

Source: Child Action, Inc., Sacramento County



POPULATION TRENDS



Analysis of the population of children provides context for the overall need for child care services. It compared population data between 2014 and 2020 to the number of available licensed child care spaces.

Between 2014 and 2020, the total population of children in Sacramento County age 0 to 5 virtually did not change; it declined by 0.2% (Exhibit 11). The population of children age 0 to 1 increased by 0.7%, whereas the population of children age 2 to 5 declined by 0.7%. Similar trends are observed in the Sacramento region's total population of children, which declined by just 0.7%.

California saw a significant decrease (6.9%) in the population of children age 0 to 5 between 2014 and 2020. This decrease mostly owed to the reduction of the population age 0 to 1 (11.2%), but the population age 2 to 5 also declined by 4.7%.

Exhibit 11. Population and percent change, children age 0–5, Sacramento County, six-county Sacramento region, California 2014–2020

Geography–Age	2014	2016	2018	2020	% Change 2014–2020
Sacramento County					
0–1	38,840	39,295	38,599	39,115	0.7%
2–5	79,026	79,064	78,955	78,458	-0.7%
Total population	117,866	118,359	117,554	117,573	-0.2%
Six-county region					
0–1	59,202	59,512	59,002	59,231	0.0%
2–5	121,276	120,653	120,626	119,932	-1.1%
Total population	180,478	180,165	179,628	179,163	-0.7%
California					
0–1	994,503	984,271	936,637	883,117	-11.2%
2–5	2,020,240	2,017,133	1,993,875	1,924,956	-4.7%
Total population	3,014,743	3,001,404	2,930,512	2,808,073	-6.9%

Source: California Department of Finance, Demographic Research Unit, Report P-2B, www.dof.ca.gov/Forecasting/Demographics/Projections/



Exhibit 12 compares the population totals for children age 0 to 5 to the number of licensed spaces reported by CCCRRN between 2014 and 2021. (The most recent population data are for 2020, whereas the most recent data on child care facilities and spaces are for 2021).

According to the most recent data for Sacramento County, the number of spaces (39,564) is 33.7% of the population of children age 0 to 5 (117,573). The figure has changed little since 2014. Population totals have remained virtually unchanged. The share of children compared to the number of licensed spaces decreased slightly between 2014 and 2021 in the county and the region, then slightly increased in 2021.

The number of spaces is slightly higher in the region (34.1%) than the county. The figure was slightly smaller in 2017 and 2019, but identical to that in 2014. In California, the figure was slightly lower, 29.6% in 2021.

In Sacramento County, the number of licensed spaces equals **33.7%** of the population of children age 0 to 5.

The figure has remained nearly constant since 2014.

Exhibit 12. Population 0–5 compared to total licensed spaces, difference and percentage, Sacramento County, 6-county Sacramento region, California, 2014–2020

	2014	2017	2019	2020/2021
Sacramento County				
Population 0–5	117,866	117,428	117,899	117,573
Total spaces	38,925	38,094	37,593	39,564
Difference	78,941	79,334	80,306	78,009
<i>Share of population</i>	33.0%	32.4%	31.9%	33.7%
6-county region				
Population 0–5	180,478	179,142	179,827	179,163
Total spaces	61,581	59,147	59,242	61,165
Difference	118,897	119,995	120,585	117,998
<i>Share of population</i>	34.1%	33.0%	32.9%	34.1%
California				
Population 0–5	3,014,743	2,970,310	2,871,558	2,808,073
Total spaces	890,559	853,401	841,327	832,108
Difference	2,124,184	2,116,909	2,030,231	1,975,965
<i>Share of population</i>	29.5%	28.7%	29.3%	29.6%

Sources: California Department of Finance, Demographic Research Unit, Report P-2B, www.dof.ca.gov/Forecasting/Demographics/Projections/, and California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool/>; Child Action, Inc.

INDUSTRY (JOBS) COUNTS AND TRENDS



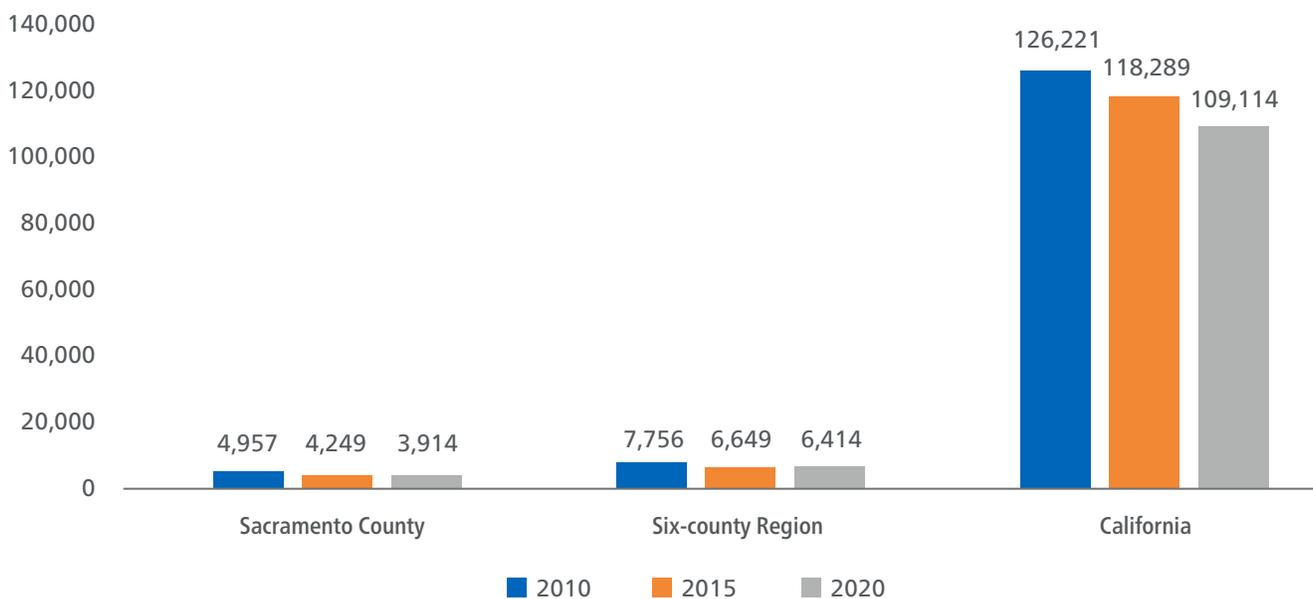
Several jobs trends highlight the size and performance of the labor market over a 10-year period. In addition, they illuminate the short-term impacts of the pandemic and the industry’s response during the recovery.

The analysis of jobs counts used estimates from surveys conducted by the Center for the Study of Child Care Employment at UC–Berkeley. This analysis provided estimates of the size of the child care workforce in centers and family child care homes as well as in specific jobs categories.

Industry annual and monthly jobs trends

Analysis of annual jobs counts for child care services in Sacramento County, the Sacramento region, and California between 2010 and 2020 show that the industry experienced an overall jobs loss in all three geographies (Exhibit 13). In 2020, Sacramento County had 79% (3,914 jobs) of 2010 totals (4,957 jobs). The region and state fared better, but their jobs counts for child care services were still far below 2010 levels. In the same year, the Sacramento region had 83% (6,414 jobs) of 2010 totals (7,756), and the state, 86% (109,114 jobs) of 2010 totals (126,221 jobs).

Exhibit 13. Child day care services employment, Sacramento County, Greater Sacramento region, and California, 2010–2020

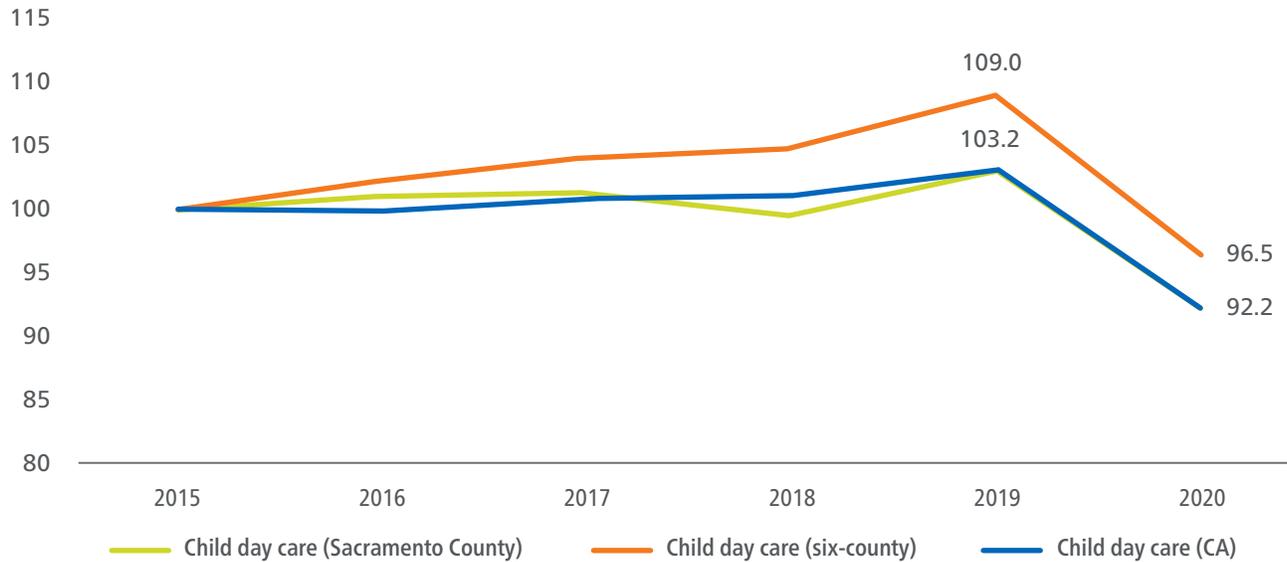


Source: Emsi, 2022.2 QCEW, Non-QCEW, Self-Employed; NAICS 624410 Child Day Care Services

Jobs losses were consistent every year between 2010 and 2015. The losses were curbed between 2015 and 2019. Exhibit 14 shows that the Sacramento region in 2019 increased its child day care services workforce by 9% over 2015 levels. Sacramento County and the state had more modest increases, growing the child day care workforce by just 3.2%.

The pandemic wiped out that progress, resuming the pre-2015 downward trend. In 2020, annual totals show that in Sacramento County the workforce was 7.8% smaller than in 2015. In the Sacramento region, it was 3.5% smaller.

Exhibit 14. Child day care services employment, Sacramento County, Greater Sacramento region, and California, 2015–2020 (indexed to 2015)



Source: Emsi, 2022.2 QCEW, Non-QCEW, Self-Employed; NAICS 624410 Child Day Care Services

Note: The bottom numbers are listed only once for two geographies. The numbers for Sacramento County and for California are virtually identical.

Monthly totals from a separate measure indicate that post-2015 jobs growth continued in the industry until the onset of the pandemic. Between March 2020 and April 2020, the industry lost nearly 34% of its employment. By January 2022, the industry had regained 65% of its lost jobs, but its jobs number remained 12% lower than in March 2020.

Exhibit 15 compares monthly jobs totals in California. In January 2022, those totals were 7.8% below 2019 levels. The monthly data reinforce the annual trends noted above, demonstrating that (a) the pandemic wiped out modest jobs gains of 2015 through 2019 (early 2020), and (b) the recovery has lagged, with jobs totals far off those in the months preceding the pandemic.

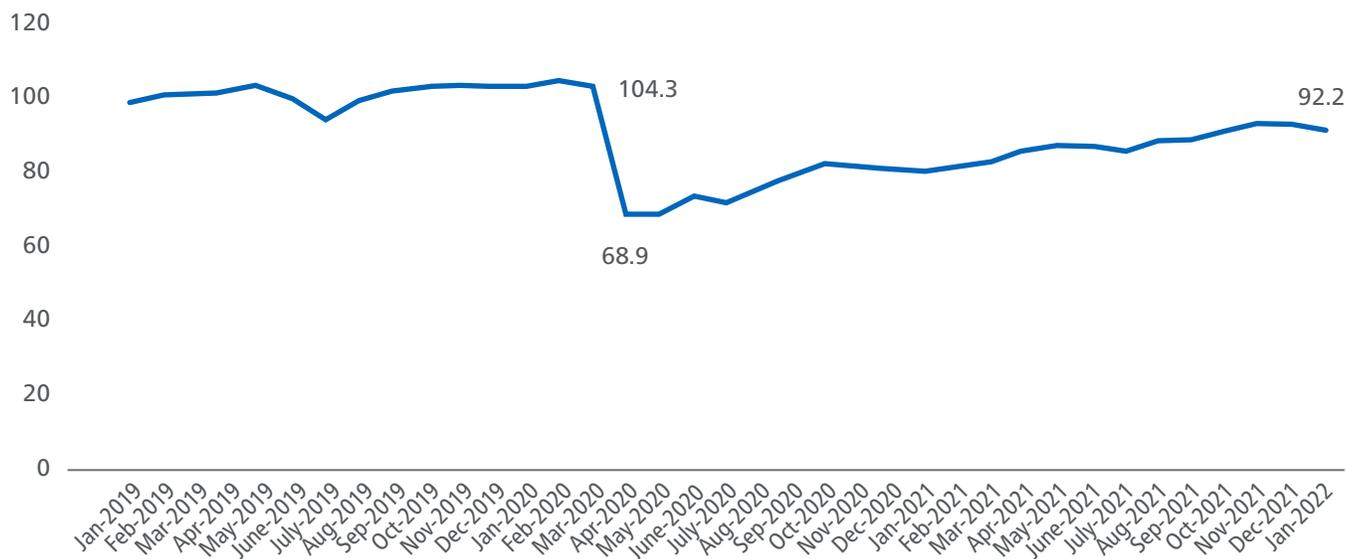
By January 2022, the state had recovered just **65%** of the child care jobs lost in early 2020.

The pandemic effectively reset the child care industry on a jobs loss trajectory.

In 2020, the child care industry in Sacramento County had **21%** fewer jobs than it did in 2010.



Exhibit 15. Child day care services monthly employment, California, January 2019–January 2022 (indexed to January 2019)



Source: Employment data—California Employment Development Department, Labor Market Information Division, Current Employment Statistics (CES), <https://www.labormarketinfo.edd.ca.gov/cgi/dataanalysis/areaselection.asp?tablename=ces>

Note: The CES uses a similar industry title for its monthly business survey, but the industry designation is not a NAICS code.

Jobs estimates and trends: Centers and homes

To estimate jobs totals overall and by job category, the analysis of jobs numbers in the child care industry used estimates from the CSCCE at UC–Berkeley to create a modeled scenario.²⁷ The estimates were applied to the number of facilities taken from the CCCRRN Data Tool. The estimates are based on a constant staffing number and changing numbers of facilities. See Appendix B for an explanation of the methodology.

In 2021, the state had an estimated 145,715 child care jobs in licensed child care facilities (Exhibit 16). Nearly three-quarters of these jobs were in child care centers. In the six-county Sacramento region, 62% of regional child care jobs (11,718) were in Sacramento County (7,283 jobs). The remaining 38% were in the other five counties.

Using the scenario model, the county added 10.5% center jobs between 2014 and 2021. The region increased its center workforce by 7.1%. The state lost jobs in child care centers in every year included in the analysis.

Family child care homes experienced the largest modeled jobs reductions before the pandemic in all studied geographies. Between 2019 and 2021, family child care home jobs increased in the county by 11.7% and in the region by 8.3%, but jobs numbers were still far below 2014 levels. The state had steady job losses in family child care homes in every year studied, but losses were fewer during the pandemic.

The modeled scenario indicates that between 2014 and 2021 Sacramento County should have increased its ECE workforce by 5.4%. The Sacramento region should have increased its employment by 1.3%.

The modeled scenario shows that Sacramento County should have increased its ECE workforce by 5.4% between 2014 and 2021. Instead, the industry reduced its workforce by 7.8%.

27. Marcy Whitebrook et al. "California Early Care and Education Workforce Study: Licensed Family Child Care Providers, Statewide 2006," Center for the Study of Child Care Employment, 2006, <https://csce.berkeley.edu/publications/report/california-early-care-and-education-workforce-study-licensed-family-child-care-providers-statewide-2006/>.

Exhibit 16. Modeled jobs totals and trends, child care centers and family child care homes, Sacramento County, Sacramento region, California, 2014–2021, 2019–2021

	2014	2017	2019	2021	% change 2014–2021	% change 2019–2021
Sacramento County						
Child care centers	4,753	4,845	4,825	5,253	10.5%	8.9%
Family child care homes	2,159	1,873	1,818	2,030	-6.0%	11.7%
Total jobs	6,912	6,718	6,643	7,283	5.4%	9.6%
Six-county Sacramento region						
Child care centers	8,180	8,058	8,089	8,762	7.1%	8.3%
Family child care homes	3,390	2,855	2,731	2,957	-12.8%	8.3%
Total jobs	11,570	10,913	10,820	11,718	1.3%	8.3%
California						
Child care centers	114,546	110,833	108,671	107,651	-6.0%	-0.9%
Family child care homes	45,868	41,127	39,103	38,065	-17.0%	-2.7%
Total jobs	160,414	151,961	147,774	145,715	-9.2%	-1.4%

Sources: California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool>, and Center for the Study of Child Care Employment; Child Action, Inc.
 Note: These estimates are based on a single estimate for one point in time that were applied evenly across the years studied. See Appendix B for more detail on the methodology.

Jobs category estimates: Centers and homes

Data for jobs in specific categories provide context for workforce needs. California generally divides the child care workforce differently for child care centers than for family child care homes. There are three categories of jobs in child care centers: teachers’ aides and assistant teachers, teachers, and supervisors/directors. Child care centers subject to Title 5, such as state preschool, have additional jobs subcategories, which are detailed in the section below on education and training. Family child care homes have two jobs categories: assistants and providers. These are the same categories that are counted by the California Child Care Resource & Referral Network and that have been studied by the Center for the Study of Child Care Employment. The analysis used these sources to estimate the number of jobs in these major categories, which are described in Exhibit 17.

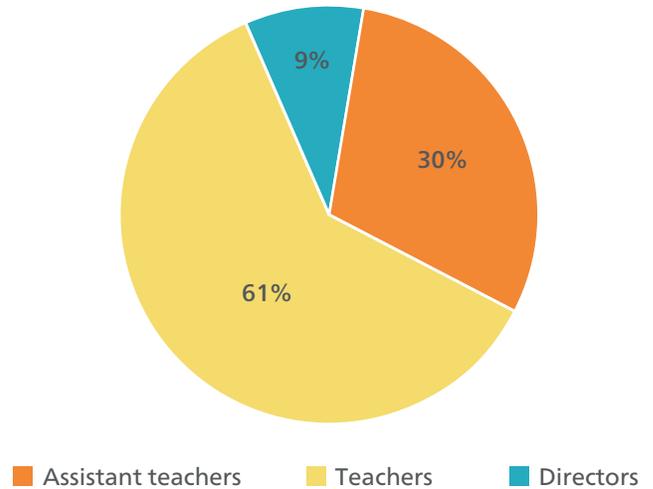
Exhibit 17. Major jobs categories in child care centers and family child care homes in California

Jobs categories	Description
Child care centers	
Teacher’s aides and assistant teachers	Entry-point positions; work under supervision, low unit or no educational requirements beyond high school; minimum 18 years old; Head Start has additional requirements
Teachers	Provide learning program; outreach to families, parent coordination; designated unit requirements and experience; Title 5 has three tiers of teachers beyond assistant teacher (associate, teacher, master); Head Start has additional requirements
Supervisors/directors	Operational oversight, administrative duties with regulating agencies; requirements for units in early childhood; Title 5 requires degree completion and has two categories (supervisor, director); Head Start has additional requirements
Family child care homes	
Assistants	Fulfill ratio requirements for large home facilities; work under supervision; no education requirements beyond high school
Providers	Small business owners; no education requirements; health and safety training

In child care centers in California and its regions, 61% of staff are teachers, 30% are assistant teachers, and 9% are directors (Exhibit 18). The estimates are applied uniformly across the studied geographies. In child care centers, for the year 2021, Sacramento County had 5,253 jobs, the Sacramento region had 8,762 jobs, and the state had 107,651 jobs.

Exhibit 18. Child care center jobs estimates, total and share of total by job category, Sacramento County, Sacramento region, and California, 2021

Sacramento County	
Assistant teachers	1,597
Teachers	3,193
Directors	464
Total	5,253
Six-county Sacramento region	
Assistant teachers	2,663
Teachers	5,326
Directors	773
Total	8,762
California	
Assistant teachers	32,717
Teachers	65,435
Directors	9,499
Total	107,651

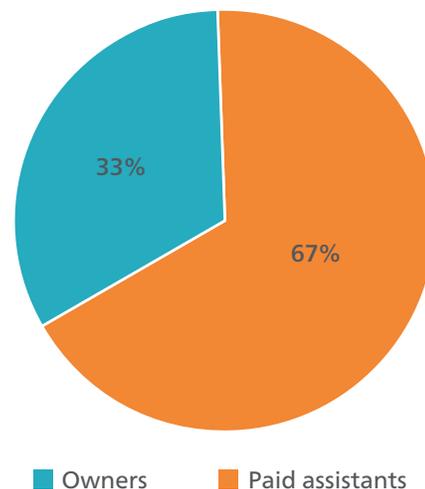


Sources: California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool>, and Center for the Study of Child Care Employment; Child Action, Inc.

In family child care homes in California and its regions, owner-operators make up 67% of the workforce and paid assistants (required in large home facilities), 33% (Exhibit 19). Estimates are applied uniformly across the studied geographies. In family child care homes, for the year 2021, Sacramento County had 2,030 jobs; the Sacramento region, 2,957 jobs; and the state, 38,065 jobs.

Exhibit 19. Family child care homes jobs estimates, total and share of total by job category, Sacramento County, Sacramento region, and California, 2021

Sacramento County	
Owners	1,359
Paid assistants	671
Total	2,030
Six-county Sacramento region	
Owners	1,979
Paid assistants	978
Total	2,957
California	
Owners	25,478
Paid assistants	12,587
Total	38,065



Sources: California Child Care Resource & Referral Network, Child Care Data Tool, <https://rrnetwork.org/research/child-care-data-tool>; Center for the Study of Child Care Employment; Child Action, Inc.

WORKFORCE DEMOGRAPHICS



Demographic data shed light on phenomena that may contribute to wealth disparities among groups of workers, the need for additional training and education targets, and the threat of retirements of large shares of older workers. The research uses survey data from CSCCE, and it highlights the Central region that includes Sacramento County. The other counties in the Sacramento region are included in the Northern region. The report notes any significant differences. See Appendix B for a full description of each region.

Occupation data and survey data from CSCCE showed that a tiny fraction of child care workers and preschool teachers are men: between 1% and 6%, depending on the source.²⁸

Family child care home providers and center teachers are comprised mostly of workers in nonwhite categories. Some 40% of family child care home providers and center teaching staff are Latina, compared with about one-quarter of center directors (Exhibit 20). Family child care homes have the largest share of African Americans, 11% of the workforce.²⁹ About 60% of center directors are white.

Between 8% and 11% of the child care workers identified as multi-ethnic. Between 4% and 7% of the workforce identified as Asian.

The share of Latinas in family child care homes and among center directors in the Central region is double the share in the Northern region; the share of Latinas among center teaching staff in the Central region is triple the share in the Northern region. Whites make up a much larger share of the total for all three job categories in the Northern region.

Foreign-born workers make up 32% of family child care home providers, 23% of center teachers, and 12% of center directors in the Central region.



Seven of 10 family child care home providers and center teachers are in nonwhite categories.

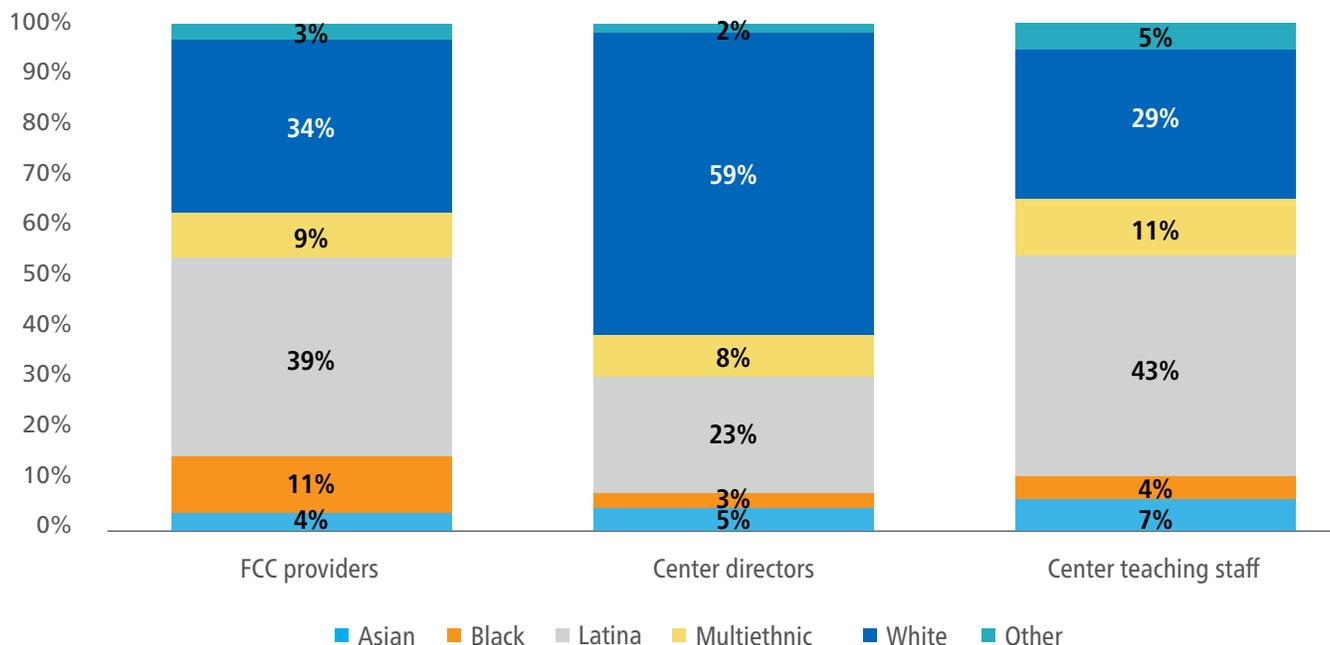
Just **four of 10** center directors are nonwhite.

43% of center teachers are Latina, but only **23%** of center directors are Latina.

28. Emsi, 2022.2 and Anna Powell et al., "Demographics of the California ECE Workforce," Center for the Study of Child Care Employment, 2022, <https://cscce.berkeley.edu/publications/data-snapshot/demographics-of-the-california-ece-workforce/>. Highlighted data on foreign-born workers come from the same report.

29. The report language follows the CSCCE in using "Latina," given the preponderance of women in the field.

Exhibit 20. Race/ethnicity share of total family child care home and center workers, by job category, Central region



Source: Anna Powell et al, “Demographics of the California ECE Workforce,” Center for the Study of Child Care Employment, January, 2022, <https://csce.berkeley.edu/publications/data-snapshot/demographics-of-the-california-ece-workforce/>.

Note: The Central region includes Sacramento County. The other five counties of the Sacramento region are counted in the Northern region of the state. Percentages are rounded and do not equal 100%.

In the Central region, virtually all center teaching and management staff speak English; the figure is 88% for family child care home providers. One-quarter of center staff and one-third of family child care home providers speak more than one language—the most common non-English language spoken is Spanish (37% of center teachers and 35% of family child care home providers). Other languages are spoken by fewer than 6% of center teachers and managers and by fewer than 8% of family child care providers.

All jobs categories have large shares of workers in the older age brackets (Exhibit 21). Center teachers have significant shares of workers in all age categories.

Retirements of center directors and family child care home providers could create workforce shortages. Just more than half of center directors and just under half of family child care home providers are age 50 and older. Just 3% of center directors and family child care home providers are under age 30. Family child care home providers make up the oldest child care workforce: 80% of providers are age 40 and older.

Age data on centers also shows a large share of the workforce in older categories. Just more than half of teachers are age 40 and older. Nearly a third are over age 50. A fifth of teachers are younger than 30.

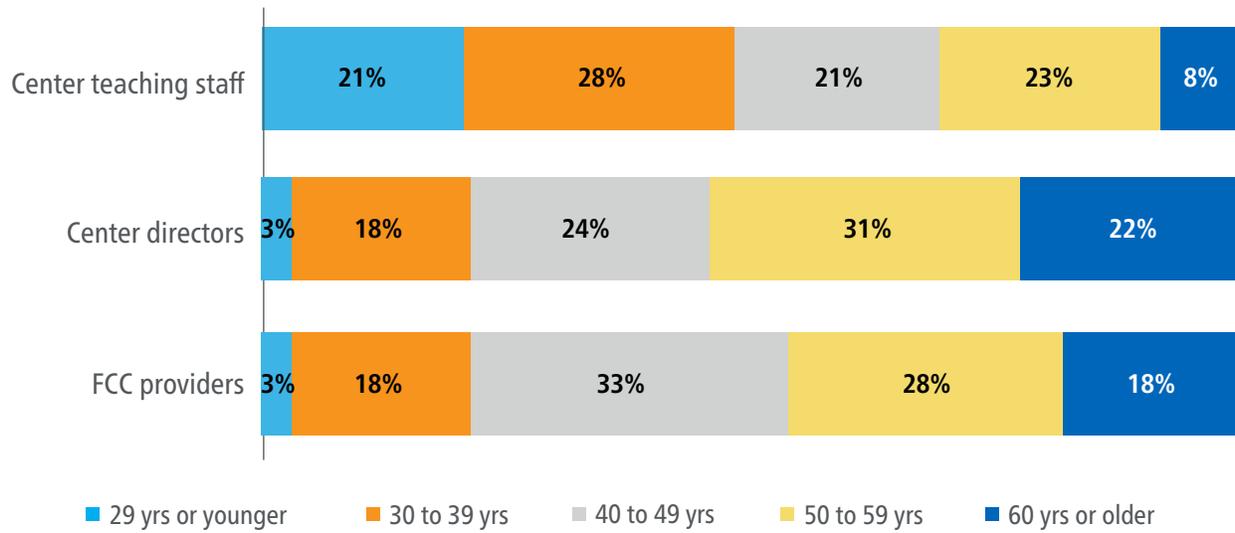
Age demographic data for the Northern region and Central region are nearly the same.

Age data from the CSCCE on the child care workforce indicate that recruiting relatively young workers is a challenge.

Of the family child care home workforce, **80%** is age 40 and older.

Just **3%** of family child care home providers and center directors are under age 30.

Exhibit 21. Age share of total family child care home and center workers, by job category, Central region



Source: Anna Powell et al, "Demographics of the California ECE Workforce," Center for the Study of Child Care Employment, January, 2022, <https://csce.berkeley.edu/publications/data-snapshot/demographics-of-the-california-ece-workforce/>.
Note: The Central region includes Sacramento County. The other five counties of the Sacramento region are counted in the Northern region of the state.



EDUCATIONAL ATTAINMENT

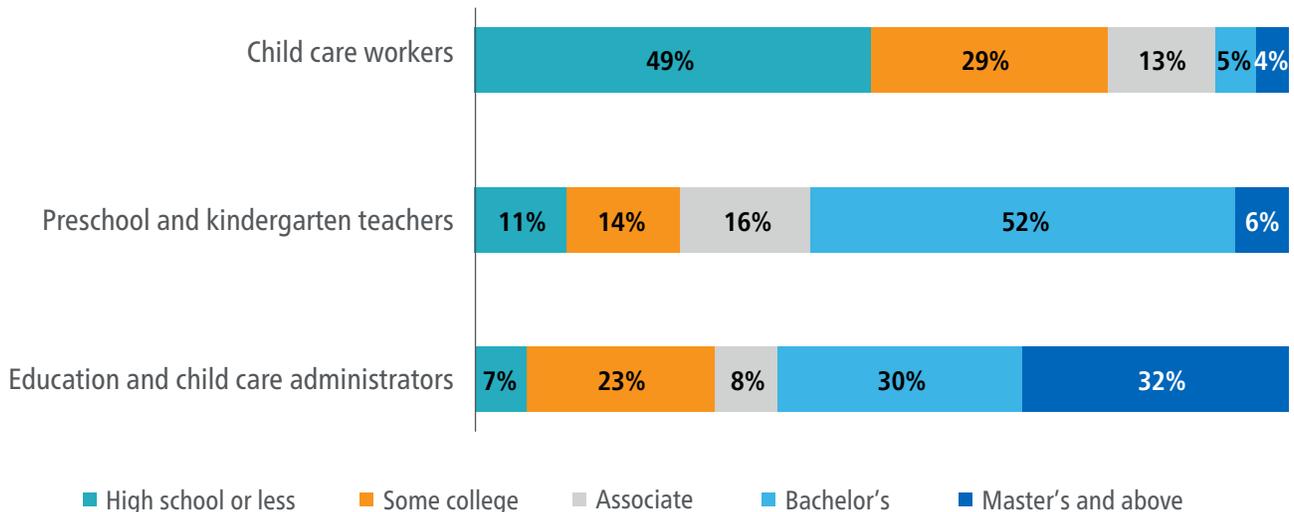


Educational attainment data reveal the share of the workforce that can gain entry-level jobs and advance with additional training and education. The share of the workforce with little or no postsecondary education are workers that can fill open positions by completing education requirements.

The occupational data indicate that a majority of child care workers have no formal higher education credentials: just 21% have an associate degree or higher (Exhibit 22). Preschool teachers are combined with kindergarten teachers in the data. Of workers in that category, 74% have an associate degree or higher; 52% have a bachelor's degree. Administrators have a similarly high level of educational attainment—a third have advanced degrees.

The lack of formal higher education credentials among significant shares of child care workers, family child care home providers, and teachers' assistants suggests the potential for advancement with upskilling and credentialing programs.

Exhibit 22. Educational attainment, workers 25 years and older, share of total child care workers, teachers, and administrators, Sacramento County, 2019



Source: U.S. Census Bureau, American Community Survey, PUMA, 1-Year Estimates, 2019

Compared with occupational data from the U.S. Census, survey data from CSCCE offer a more nuanced analysis of the child care workforce, but the data are not available by county (Exhibit 23).

Slightly more than half of family child care home providers in California (53%) have an associate degree or higher; the remainder (47%) have less than an associate degree.

Educational attainment for teacher’s aides is only slightly higher than that for family child care home providers: 41% of aides have less than an associate degree. Assistants and aides have the largest share of associate degree attainment (35%). More than half (55%) of center teachers and 73% of center directors have bachelor’s degrees.

According to the CSCCE survey report, of staff in child care centers, 68% to 75% (depending on position) had majors in early childhood education or child development. Fewer family child care home providers (53%) had such majors. Those holding bachelor’s degrees were less likely to have had an early childhood major. But those with an associate degree or some college credit overwhelmingly focused on early childhood coursework.

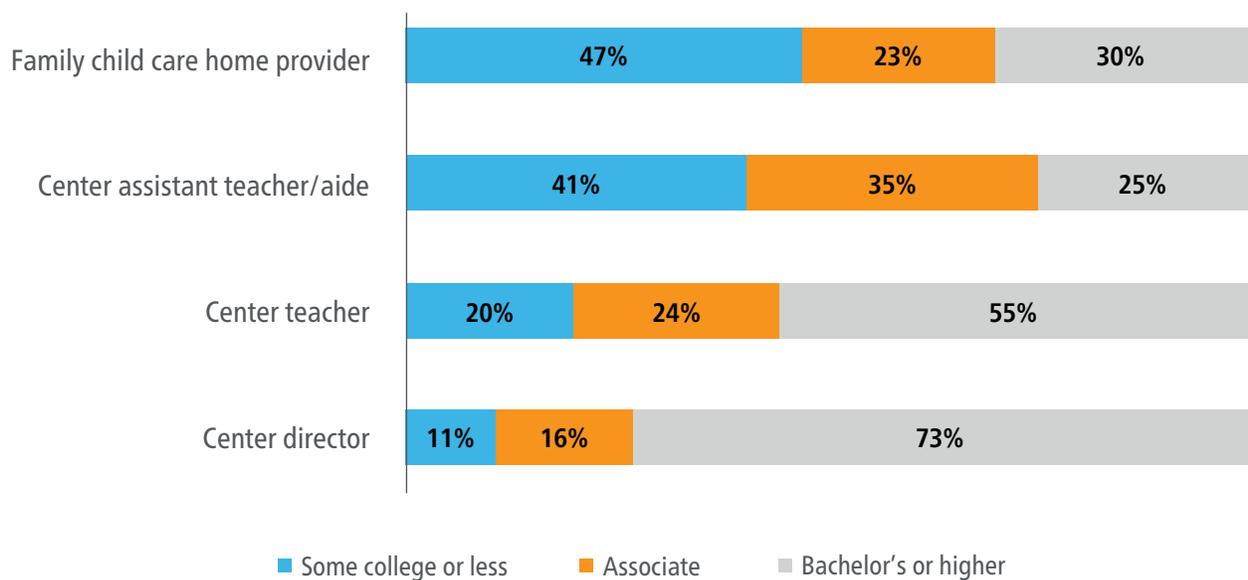
The CSCCE report also notes that staff in Head Start and state preschool facilities have slightly higher rates of associate and bachelor’s degree attainment.

More than half of licensed center teachers in California (**55%**) have bachelor’s degrees.

More than half of family child care home providers (**53%**) and **60%** of center assistants/aides have an associate degree or bachelor’s degree.

A large majority of the child care workforce focuses its coursework on early childhood education or child development.

Exhibit 23. Educational attainment, family child care home providers, and center teachers and directors, California, 2020



Source: Yoonjeon Kim et al, "Education and Experience of the California ECE Workforce," Center for the Study of Child Care Employment, February 2022, <https://csce.berkeley.edu/publications/data-snapshot/education-and-experience-of-the-california-ece-workforce/>

WAGES



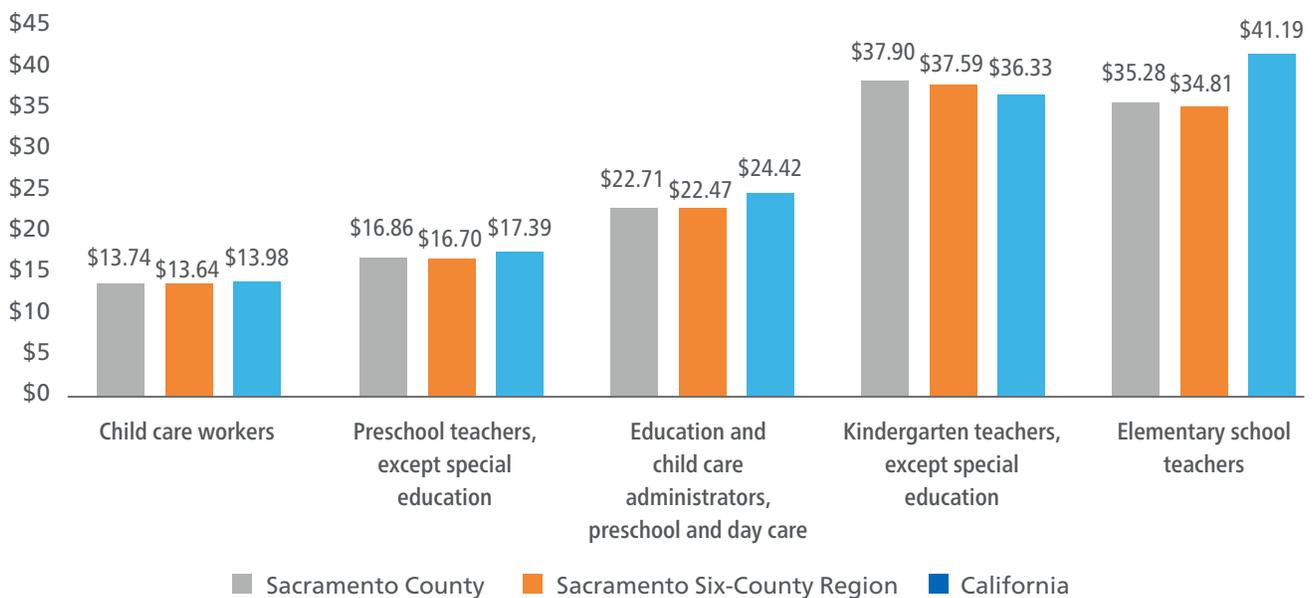
Wage data offer insights into job quality and earning potential. The analysis compared the wages of the ECE workforce to those of kindergarten and elementary school teachers and compared both to the living wage and the self-sufficiency wage. In all the studied geographies, preschool teachers earn significantly less than half the wages of kindergarten teachers and elementary school teachers (Exhibit 24).

In Sacramento County, preschool teachers earn 44% (\$16.86 hourly) of the median hourly wage of a kindergarten teacher (\$37.90). Child care workers earn just 36% (\$13.74) of that wage. The figure for child care administrators is 60% (\$22.71).

Wage rates are roughly equivalent in Sacramento County and in the region overall. Wage rates, with the exception of those for kindergarten teachers, are only slightly higher statewide.

In Sacramento County, preschool teachers earn **44%** of the median wage of kindergarten teachers. Child care administrators earn **60%** of the median wage of kindergarten teachers.

Exhibit 24. Median hourly earnings for child care workers and administrators, preschool teachers, and kindergarten and elementary school teachers, Sacramento County, Sacramento region, and California, 2020



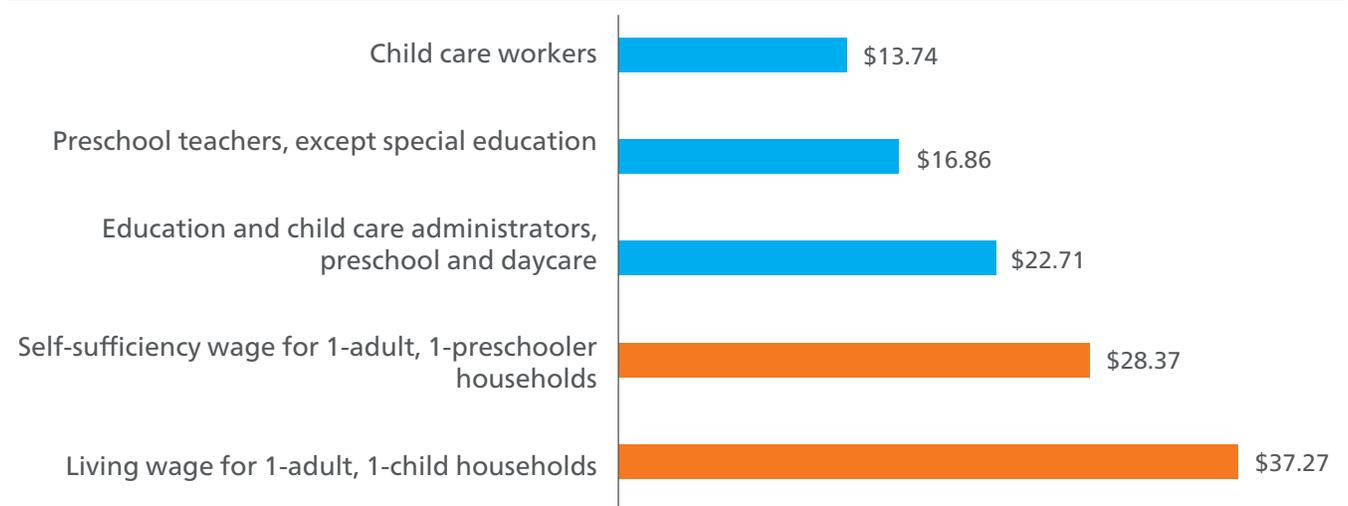
Source: Emsi, 2022.2 QCEW, Non-QCEW, Self-Employed

The analysis compared median wage rates for early childhood occupations to a living wage (Massachusetts Institute of Technology) and a self-sufficiency wage (University of Washington) for a one-adult, one-child household in Sacramento County (Exhibit 25). In Sacramento County, the living wage is \$37.27. The self-sufficiency wage is \$28.37.

Median wages for child care workers in Sacramento County are \$23.53 lower than the living wage and \$14.63 lower than the self-sufficiency wage. For preschool teachers, median wages are \$20.41 lower than the living wage and \$11.51 lower than the self-sufficiency wage. For child care administrators, median wages are \$14.56 lower than the living wage and \$5.66 lower than the self-sufficiency wage.

In Sacramento County, median wages for child care workers are just **37%** of the living wage for a one-adult, one-child household.
Preschool teachers earn just **45%** of the living wage.
Child care administrators earn only **60%** of the living wage.

Exhibit 25. Median hourly earnings for child care workers and administrators and preschool teachers compared to self-sufficiency and living wages for one-adult, one-child households, Sacramento County, 2020



Sources: Emsi, QCEW, Non-QCEW, Self-Employed, 2022.2; Self-Sufficiency Wage Standard, Center for Women’s Welfare, University of Washington, <https://selfsufficiencystandard.org/>; Amy K. Glasmeier, Living Wage Calculator, Massachusetts Institute of Technology, <https://livingwage.mit.edu>
Note: The COE typically uses the UW self-sufficiency wage. The CSCCE uses the MIT living wage. Both are offered for comparison. The UW estimates lower costs for the basket of goods that includes rent, food, utilities, child care, and other household costs.

EDUCATION AND TRAINING



Regulatory frameworks and requirements for positions in licensed child care facilities provide context for analysis of awards trends. These trends indicate the number of trained workers entering into and advancing through the industry's workforce ranks.

Licensed preschools and ECE preschools, family child care homes, and child care centers fall under several regulatory frameworks that require formal education, training, and experience. Community colleges and universities provide the necessary formal education. Their programs enable new entrants to the field to qualify for assistant teacher and teacher positions. They also enable the existing workforce to advance to higher positions and to positions in state preschools and Head Start, which have additional education requirements.

To assess the needs for workforce development, the analysis considered the following aspects of the education and training landscape:

- Education and experience requirements under Title 5, Title 22, and Head Start
- Assets of ECE programs in community colleges and universities in the Greater Sacramento region
- Certificate and degree awards trends between 2013 and 2021

The program numbers and awards production provide insight into the availability of trained workers entering the field and advancing through the ranks.

Regulations and education requirements

State and federal guidelines cover programs and facilities on the basis of funding sources and contractual obligations. Guidelines require levels of education and experience by position category.

Title 22

Title 22 covers private-sector ECE centers and family child care homes. These facilities generally have the most basic education and experience requirements.

Title 5

Title 5, which covers California state preschool and transitional kindergarten, stratifies job categories more than Title 22 and Head Start frameworks by identifying two levels of assistant and supervisor and three levels of teacher. This structure was designed to support advancement with additional education and experience. ECE teaching and management staff get permits from the California Commission on Teacher Credentialing.

Head Start

In general, Head Start programs and facilities require the highest level of education, but a share of assistants and teachers may have qualifications that resemble those required under Title 5 and Title 22 frameworks.

Exhibit 26 details the education and experience requirements under each regulatory framework.³⁰

30. The requirements are those in effect when the research was conducted in the first half of 2022.

Exhibit 26. Child care aide, teacher, and supervisor education and experience qualifications, Title 5, Title 22, and Head Start

	Title 5 centers (e.g., state preschool); transitional kindergarten has additional requirements*	Title 22 public and private centers and family child care homes	Head Start and Early Head Start
Teachers' aides, assistant teachers	<i>Assistant:</i> 6 units of ECE/CD	<i>Aide and assistant:</i> at least 18 years old, supervised, 6 units of ECE/ED, high school degree or equivalent; FCC—no unit requirements	<i>Aide and assistant:</i> child development permit
Teachers	<p><i>Associate:</i> 12 units of ECE/CD and core coursework and experience OR associate in ECE/CD</p> <p><i>Teacher:</i> 24 units of ECE/CD and 16 general education units and 6 months of experience OR associate in ECE/CD and supervised experience</p> <p><i>Transitional kindergarten teacher:</i> teaching credential and >20 units ECE/CD</p> <p><i>Master teacher:</i> teacher requirements, 16 GE units, 8 units in specialization, supervisory units, and ~1 year of experience OR bachelor's degree and 12 units in ECE/CD and supervised units</p>	<p><i>Teacher:</i> 12 units of ECE/CD and 6 months of experience OR associate in ECE/CD or equivalent with experience</p> <p><i>FCC Owner:</i> 18 years old, 16 hours of health and safety training; large FCC home providers—1 year of experience as small FCC provider or center teacher/director</p>	<p><i>Teacher:</i> associate degree in ECE/CD with experience or equivalent with early childhood experience OR associate in ECE/CD with specialization in infant and toddler</p> <p>nationally, 50% of teachers must have a bachelor's degree in ECE/CD</p>
Supervisors/directors	<p><i>Site supervisors:</i> teacher requirements, associate degree, administrative/supervisory units, and ~1 year of experience OR bachelor's degree and 12 units in ECE/CD and supervised units OR administrative services credential OR teaching credential and 12 units in ECE/CD and 3 supervised units</p> <p><i>Program director:</i> teacher requirements, bachelor's degree, administrative/supervisory units, and 1 year of experience OR administrative services credential, 12 units ECE/CD, and supervised units OR teaching credential, 12 units ECE/CD, and 8 administrative/supervisory units OR master's degree in ECE/CD</p>	<p><i>Directors:</i> 12 units of ECE/CD and administration units, 4 years of teaching experience OR degree in ECE/ED and administration units plus teaching experience OR permit as program director/supervisor</p>	<p><i>Supervisors:</i> bachelor's in ECE/CD and supervisory and administration experience</p>

Sources: California Commission on Teacher Credentialing, "Child Development Permits (CL-797)," <https://www.ctc.ca.gov/credentials/leaflets/child-development-permits-cl-797/>; Department of Social Services, "How to Become Licensed," <https://www.cdss.ca.gov/inforesources/child-care-licensing/how-to-become-licensed>; Head Start California, "Early Education and Child Care Regulation Quick Reference Guide," https://headstartca.org/wp-content/uploads/2018/12/Early_Ed_and_Child_Care_Reg_QuickReference_Guide.pdf; U.S. Department of Health and Human Services, Head Start Early Childhood Learning and Knowledge Center, "Educational Qualifications for Staff: A Series of Briefs," <https://eclkc.ohs.acf.hhs.gov/human-resources/article/head-start-staff-qualifications>



Spotlight on transitional kindergarten

California created transitional kindergarten with the Kindergarten Readiness Act of 2010. Transitional kindergarten lengthened kindergarten to a two-year experience, starting with children at age 4.

At the end of 2020, the legislature outlined an expansion of transitional kindergarten to all the state's 4-year-olds, staggering age eligibility (dates of birthdays) each year through the 2025–2026 school year. The legislature also outlined expansion of state preschool for all income-eligible 3-year-olds. (State preschool has income eligibility guidelines, whereas transitional kindergarten does not.³¹) Both moves are part of a broader initiative known as Universal Prekindergarten (UPK) that includes multiple delivery systems and education providers and that seeks to increase the number of children receiving services in licensed child care centers.³² Transitional kindergarten currently serves about 100,000 4-year-olds in the state. Analysts project that the program will have to triple its capacity (300,000 children) by the 2025–2026 school year to serve families that choose transitional kindergarten.³³

The policy literature and agency stakeholders expect the expansion of transitional kindergarten to open up additional spaces for children younger than 4 in the state's California State Preschool Program, which serves 3-year-olds. More than half (64%) of the 143,000 children in state preschool in the school year 2018–2019 were 4-year-olds. Expanding transitional kindergarten could also mean that some capacity is merely shifted from 3-year-olds in state preschool to 4-year-olds in transitional kindergarten.³⁴

Policy observers and leaders in the field expect that the expansion of transitional kindergarten will further exacerbate workforce shortages in the field.³⁵ The UC–Berkeley Center for the Study of Child Care Employment projects that an additional 8,000 to 11,000 transitional kindergarten teachers and 26,000 aides will be needed across the state to hit service targets.³⁶ A separate report from the Learning Policy Institute puts the projected number of new teachers at 11,900 to 15,600 and of new assistant teachers at 16,000 to 19,700 by 2025–2026.³⁷

The UC–Berkeley Center for the Study of Child Care Employment projects that by 2025 California will need 8,000 to 11,000 new transitional kindergarten teachers and 26,000 aides to meet service targets.

Analysts have not attempted to put these numbers into the context of overall increased job demand in the industry. One possibility: centers could shift slots from state preschool to transitional kindergarten without actually expanding capacity. Another possibility: the positions of ECE workers moving into transitional kindergarten might not be backfilled. Yet another possibility: kindergarten and elementary school teachers will occupy a significant number of transitional kindergarten positions.

New entrants to the field will satisfy part of the demand, but many current ECE teachers meet the education requirements for transitional kindergarten.³⁸ Wage rates for transitional kindergarten are similar to those for kindergarten teachers, creating a clear incentive for existing early childhood educators and new entrants to work in transitional kindergarten positions. As many shift to transitional kindergarten positions, the early childhood teacher positions will need to be backfilled.³⁹

31. Legislative Analyst's Office (LAO), "The 2021–22 Budget: Transitional Kindergarten Package," February 5, 2021, <https://lao.ca.gov/Publications/Report/4350>.
32. California Department of Education, "Universal Prekindergarten FAQs," 2022, <https://www.cde.ca.gov/ci/gs/em/kinderfaq.asp>.
33. Hannah Melnick et al., "Building a Well-Qualified Transitional Kindergarten Workforce in California: Needs and Opportunities," Learning Policy Institute, June 27, 2022, <https://learningpolicyinstitute.org/product/ca-transitional-kindergarten-workforce-report>.
34. LAO, "The 2021–22 Budget: Transitional Kindergarten Package."
35. Karen D'Souza, "Universal Transitional Kindergarten: Quick Guide," EdSource, October 13, 2021, <https://edsources.org/2021/universal-transitional-kindergarten-quick-guide>.
36. Ashley Williams et al., "New Data Shows Early Educators Equipped to Teach TK," UC–Berkeley Center for the Study of Child Care Employment, August 18, 2021, <https://csce.berkeley.edu/publications/data-snapshot/early-educators-equipped-to-teach-tk/>.
37. Melnick et al., "Building a Well-Qualified Transitional Kindergarten Workforce in California: Needs and Opportunities," Learning Policy Institute, June 27, 2022, <https://learningpolicyinstitute.org/product/ca-transitional-kindergarten-workforce-report>.
38. Williams et al., "New Data Shows Early Educators Equipped to Teach TK."
39. Melnick et al., "Building a Well-Qualified Transitional Kindergarten Workforce in California: Needs and Opportunities."

Teaching requirements for transitional kindergarten are similar to those for kindergarten and elementary school: teachers must have a bachelor's degree and a multiple-subject teaching credential. As the transitional kindergarten program rolls out (by August 2023), teachers must also have 24 units of early childhood education or a child development permit at the teacher level.⁴⁰

To expand the transitional kindergarten workforce, observers have called for enhancing teacher pathway programs. Many teachers in the field do not possess a bachelor's degree, though they may have completed some or all of the 24 ECE units required for transitional kindergarten teachers. Pathway development can involve giving credit for work experience

and subsidizing additional education to meet requirements. Pathway development will be needed to help the existing ECE workforce to attain bachelor's degrees and multiple-subject teaching credentials. Additional pathway development will be needed to upskill teacher assistants to backfill the positions of teachers who move on to transitional kindergarten positions.⁴¹

The California Commission on Teacher Credentialing (CTC) is considering updates to its existing ECE credential to meet projected demand for transitional kindergarten teachers. The proposed PK–3 Early Childhood Education Specialist Credential is intended to qualify early childhood educators and existing credentialed teachers to teach transitional kindergarten. The CTC has also created provisions for emergency credentials for teachers meeting at least some of the qualifications.⁴²

The California Commission on Teacher Credentialing is considering updates to its existing early childhood education credential to meet projected demand for transitional kindergarten teachers.

Inventory of community college and university programs

The Greater Sacramento region is home to a robust set of programs to train the ECE workforce. All eight community colleges in the Greater Sacramento region have programs in early childhood education. The programs generally correspond to the permit requirements for teachers and supervisors laid out by Title 5 and the California Commission on Teacher credentialing. Most of the community colleges include tiered levels of teacher credentials: associate, teacher, and master teacher. In addition, every community college has transfer coursework that is articulated with the California State University system. All eight community colleges offer transferable associate degrees in early childhood education (Exhibit 27).

California State University–Sacramento (CSUS) is a major provider of bachelor's and master's degrees that directly target the ECE workforce. The bachelor's degree in child and adolescent development has a specialization in early childhood education.⁴³ The university also has a bachelor's degree program in Family Studies and Human Development. Because the program does not focus on early childhood education, data from it are not shown in the exhibits below.

The University of California–Davis offers child development coursework at the undergraduate level as part of its major in human development, but ECE teacher training is not the focus. The graduate group in the same area offers a master's degree in child development. The program is a social science graduate program. Awards data in Exhibit 27 do not reflect awards from UC–Davis because the university's program codes include awards from programs not focused on early childhood education.

William Jessup University, a private, faith-based university in Rocklin, has an emphasis in child development as part of a liberal studies major. The major does not focus on early childhood education.

All eight community colleges in the Sacramento region have programs in early childhood education, including associate degrees for transfer to the California State University system.

40. California Commission on Teacher Credentialing, "Transitional Kindergarten," 2022, <https://www.ctc.ca.gov/credentials/assignment-resources/transitional-kindergarten>.

41. Melnick et al., "Building a Well-Qualified Transitional Kindergarten Workforce in California: Needs and Opportunities," Learning Policy Institute, June 27, 2022, <https://learningpolicyinstitute.org/product/ca-transitional-kindergarten-workforce-report>.

42. "Emergency Specialist Teaching Permit in Early Childhood Education," <https://www.ctc.ca.gov/credentials/assignment-resources/transitional-kindergarten>.

43. CSUS's Child and Adolescent Development program (<https://www.csus.edu/college/education/undergraduate/child-adolescent-development.html>) is consolidating several concentrations. The awards numbers include all concentrations because all can be used to qualify for a child development permit. The Early Care and Education concentration is most applicable for the ECE workforce. CSUS's degree dashboard breaks out awards by concentration: <https://www.csus.edu/president/institutional-research-effectiveness-planning/dashboards/degrees-awarded.html>.

Exhibit 27. Inventory of certificate, associate, and bachelor’s degrees in early childhood education, Greater Sacramento region

Program category	ARC	CRC	SCC	FLC	YC	WCC	SC	LTCC	CSUS	UCD	WJU
Early childhood education	A,AT	A,AT	AT	A,AT	A,AT	A,AT	A,AT	A,AT,C			B***
Site supervisor/ administrator	C	A	A	A	C		C				
Assistant teacher				C							
Associate teacher	C	C		C	C	C	C				
Teacher	C	C	A	C	C	C	C				
Master teacher	C	C		C			C				
Specialization in infant and toddler	C	C	C	C	C	C	C				
Specialization in culture and diversity	C				C						
Specialization in children with disabilities	C										
Childhood development		C	A		C				B, M		
Human development									B*	B**,M**	
Family child care	C		C								

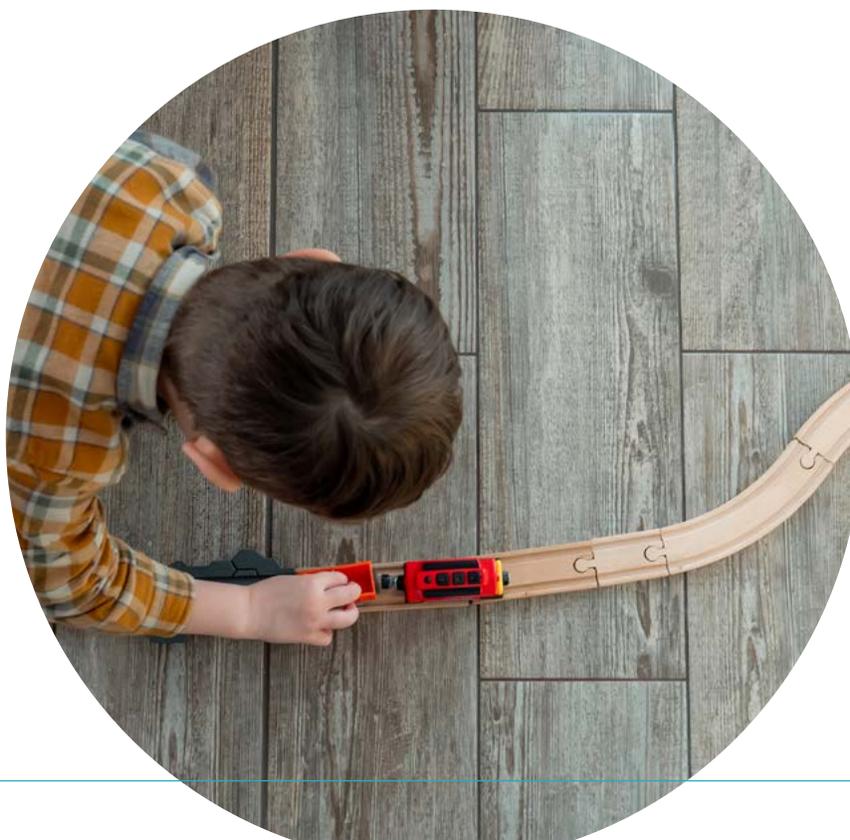
C: certificate; A: associate degree; AT: associate degree for transfer; B: bachelor’s degree; M: master’s degree

ARC: American River College; CRC: Cosumnes River College; SCC: Sacramento City College; FLC: Folsom Lake College; YC: Yuba College; WCC: Woodland Community College; SC: Sierra College; LTCC: Lake Tahoe Community College; CSUS: California State University–Sacramento; UCD: University of California–Davis; WJU: William Jessup University

* CSUS has a bachelor’s degree program in Family Studies and Human Development in the Department of Family and Consumer Sciences.

** UCD offers coursework and degrees in early childhood education as part of undergraduate and graduate programs in human development.

*** William Jessup offers an emphasis in early childhood education as part of a liberal studies program in the education school.



Community college and university awards trends

The analysis measured the number of awards issued at the Greater Sacramento region’s universities and community colleges between the academic years 2013–2014 and 2020–2021.

Exhibit 28 displays data for the annual average number of certificates and the annual average number of associate, bachelor’s, and master’s degrees awarded by the community colleges and universities in the Greater Sacramento region for the most recent three years for which data were available. The data are listed by program area. The most recent academic year for which data are available for university awards is 2019–2020.

On average, the community colleges and universities awarded 1,071 certificates and degrees annually.⁴⁴ Of these certificates and degrees, 610 are certificates and associate degrees, and 461 are bachelor’s and master’s degrees. In the community colleges, a small share of the awards is for childhood development administration and management and for infants and toddlers.

Exhibit 28. Three-year average annual ECE awards, community colleges and universities, Greater Sacramento region, by program area, 2018–2019 through 2020–2021 (community colleges) and 2017–2018 through 2019–2020 (universities)

Community colleges				
TOP code	TOP code description	Certificate	Associate	Total
1305.00	Child development/early care and education	336	215	551
1305.10	Child and adolescent development		12	12
1305.50	The school-age child	6		6
1305.80	Child development administration and management	8	13	21
1305.90	Infants and toddlers	20		20
Subtotal		370	240	610
Universities				
CIP code	CIP code description	Bachelor’s	Master’s	Total
13.1210	Early childhood education and teaching	451	10	461
Grand total				1,071

Sources: California Community Colleges Chancellor’s Office MIS System, DataMart; Emsi, 2022.2 IPEDS.

The Sacramento region’s community colleges and CSU–Sacramento have increased their awards of ECE certificates and degrees by 45% since the 2013–2014 academic year. On average, the region produces more than 1,000 certificates and degrees annually.

44. University awards data come exclusively from California State University–Sacramento. William Jessup University advertises a liberal studies major with an emphasis in child development. UC–Davis offers a child care emphasis as part of its major in human development. Available data indicate no awards in program codes related to child development from these programs, and the programs’ focus is not mainly on the core child care workforce. Therefore, this report does not include awards data for the above-noted William Jessup University and UC–Davis programs.

American River College (145 average annual awards) and Folsom Lake College (116 awards), in the Los Rios Community College District (LRCCD), led the region for ECE awards production (Exhibit 29). Cosumnes River College (61 awards) and Sacramento City College (51 awards), also in the LRCCD, have significant awards numbers. Yuba College (92 awards) and Woodland College (79 awards), part of the Yuba Community College District, also produce a large share of the region’s awards. Sierra College issued 57 awards annually during the three-year study period. Lake Tahoe Community College issued 5 awards annually during the period.

Exhibit 29. Three-year average annual awards, including certificates and associate degrees by community college and program area, Greater Sacramento region, 2018–2019 to 2020–2021 academic years

College	Child and adolescent development	Child development administration and management	Child development/early care and education	Infants and toddlers	The school-age child	Total
American River	0	5	140	1	0	145
Folsom Lake	0	4	107	4	0	116
Yuba	0	0	91	1	0	92
Woodland	3	0	68	5	2	79
Cosumnes River	0	5	48	5	2	61
Sierra	0	3	53	2	0	57
Sacramento City	4	4	38	3	1	51
Lake Tahoe	0	0	5	0	0	5

Source: California Community Colleges Chancellor’s Office MIS System, DataMart

In one program area, California State University–Sacramento issues awards related to early childhood education (Exhibit 30). The university issued 461 bachelor’s and advanced degrees on average annually over the most recent three years measured. All but 10 of these awards were bachelor’s degrees.

Exhibit 30. Three-year average annual awards, including bachelor’s and advanced degrees, California State University–Sacramento, 2017–2018 to 2019–2020 academic years

CIP code	Program	Bachelor’s	Master’s +	Total
13.1210	Early childhood education and teaching	451	10	461

Source: Emsi, 2022.2 IPEDS.

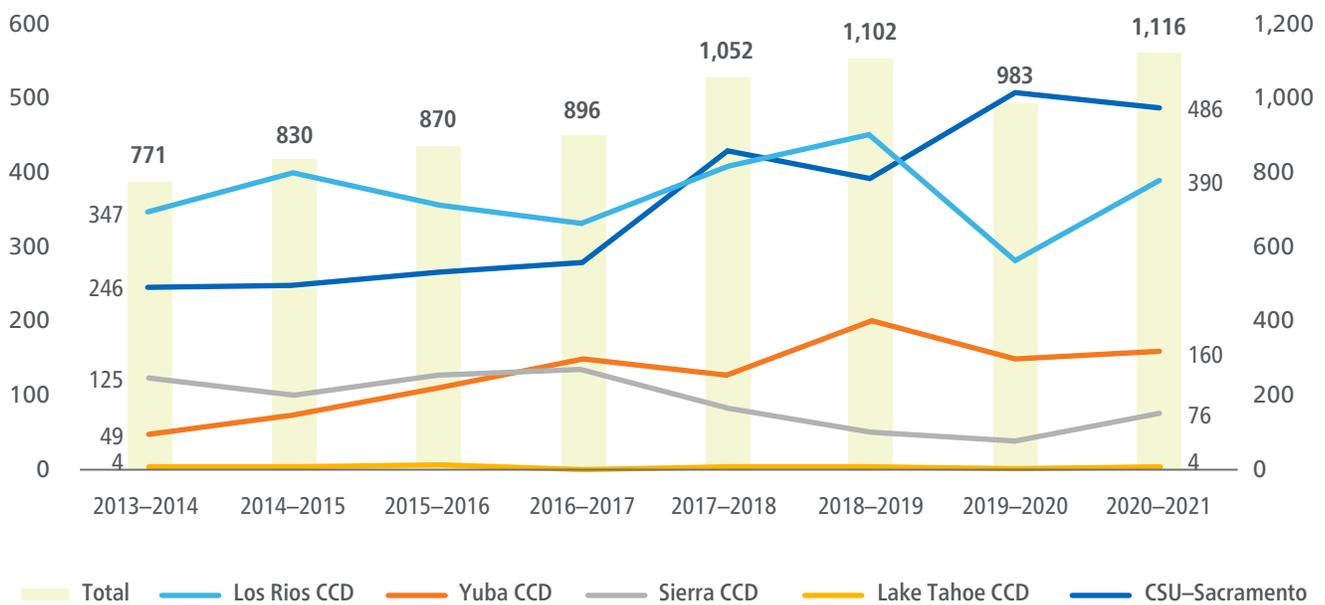


Exhibits 31 and 32 measure total award production in ECE disciplines by community college district and university in the Greater Sacramento region between the 2013–2014 and 2020–2021 academic years. (The most recent academic year for which data are available for university awards is 2019–2020. The data are adjusted to compare awards totals across systems.)

The region increased its awards production by 45% between the 2013–2014 academic year (771 awards) and the 2020–2021 academic year (1,116 awards). Much of this change was the result of increases in bachelor’s degree production at CSUS. The university increased awards by 98% (240 awards) in the 2020–2021 academic year compared with the 2013–2014 academic year.

The Yuba Community College District grew its awards production by 227%, from 49 awards in the 2013–2014 academic year to 160 awards in the 2020–2021 academic year. The Los Rios Community College District increased awards production by 29% (102 awards) between the 2013–2014 academic year and the 2018–2019 academic year, after which award production slightly decreased. Sierra College reduced awards numbers after the 2016–2017 academic year. In the most recent academic year measured, Sierra College made 39% fewer awards than in 2013–2014. Lake Tahoe Community College issues fewer than 10 awards a year.

Exhibit 31. Awards trends, including certificates and associate and bachelor’s degrees, by community college district and university, and total, 2013–2014 to 2020–2021 academic years



Sources: California Community Colleges Chancellor’s Office MIS System, DataMart; Emsi, 2022.2 IPEDS.

Exhibit 32. Awards trends, including certificates and associate and bachelor’s degrees, by community college district and university, and total, 2013–2014 to 2020–2021 academic years (detail)

College district/ university	2013– 2014	2014– 2015	2015– 2016	2016– 2017	2017– 2018	2018– 2019	2019– 2020	2020– 2021
Los Rios CCD	347	397	357	330	406	449	279	390
Yuba CCD	49	76	109	151	128	201	151	160
Sierra CCD	125	102	129	135	84	53	42	76
Lake Tahoe CCD	4	5	8	1	7	8	4	4
CSU Sacramento	246	250	267	279	427	391	507	486
Total	771	830	870	896	1,052	1,102	983	1,116

Sources: California Community Colleges Chancellor’s Office MIS System, DataMart; Emsi, 2022.2 IPEDS.

EMPLOYER INTERVIEWS



In partnership with the Center of Excellence, Valley Vision conducted interviews with 11 child care providers to understand the current workforce landscape. The interviews focused on the following topics:

- Facility and staff capacity
- Hard-to-fill and open positions
- Recruitment and retention strategies
- Career advancement
- Benefits

The interviews were conducted from May 17 to June 9, 2022. They targeted small facilities (serving as few as 8 children) and large service providers (serving as many as 137 children), all with varying staffing models. Interview candidates were found through Child Action, Inc. and internet research. Responses were collected over phone calls and email.

The interviews revealed that some organizations experienced major workforce disruptions during the pandemic, whereas others did not. Several of the interviewees could not enroll additional children because of staffing shortages. Many reported that teacher's aides and teachers represented a hiring challenge.

The interviews reveal disparity in worker benefits (education, health care, and retirement) and recruitment and retention strategies. At least half the interviewees reported few or no benefits and poor recruitment and retention strategies. Wages and benefits and advancement opportunities tended to be lowest for smaller employers. These employers also reported the most difficult pandemic-related turnover impacts and hiring challenges.

Key findings include the following:

- Most of the respondents were operating at the capacity allowable by their permit. A few respondents were unable to enroll more children because they lacked staffing capacity.
- All but one respondent reported hiring challenges. A majority of the respondents cited open positions for teacher aides and teachers, both full-time and part-time. At least one interviewee absorbed teachers from a closing school.
- Several indicated difficulty finding candidates with sufficient qualifications. One interviewee cited staffing qualification requirements as a barrier to hiring.
- Indeed was the most-cited job advertising platform. Facebook was the second-most-cited platform. Interviewees mentioned Craigslist, LinkedIn, and www.childcarecareers.net less frequently. One employer offered a bonus for referrals.
- When asked about recruitment and retention strategies, interviewees cited various job quality features and incentives. They included flexible break schedules, staff community building and retreats, monthly bonuses, tuition reimbursement for aides enrolled in school, employee referral incentives, and professional development. A few respondents said none of their recruitment and retention strategies were successful.
- Half of respondents experienced hiring and retention challenges as well as significant turnover as a result of the pandemic. The other half did not experience these challenges.
- The majority of the interviewees said their facilities offer career advancement opportunities. These interviewees cited pathways from part-time to full-time work, internal hiring practices, and resource sharing through the Department of Education. The providers who did not offer career advancement tended to be small employers serving fewer than 20 children.
- Half of the interviewees offer no educational benefits, health care insurance, or retirement benefits. A few offer a complete benefits package, whereas others offer only one or two of the benefits.

CHILD CARE WORKER SURVEY



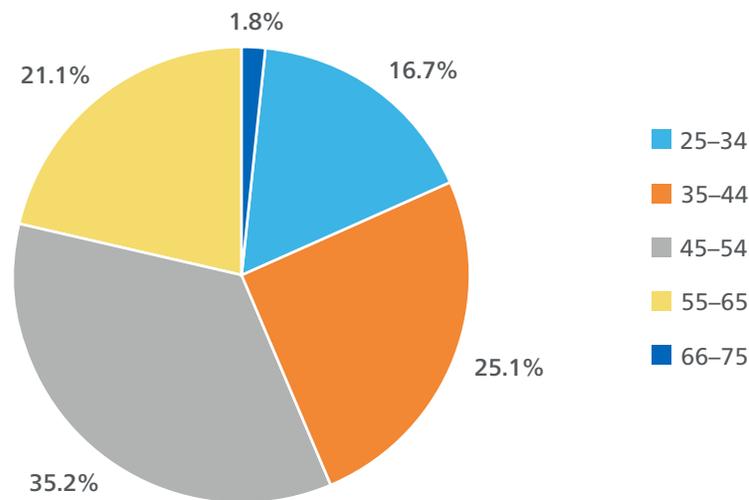
With the partnership of the Center of Excellence, Valley Vision conducted a survey of current and former child care workers in Sacramento County. The survey was conducted between April 27 and July 11, 2022. The emailed survey was distributed by Child Action, Inc., the resource and referral organization for Sacramento County, and the Sacramento Employment and Training Agency (SETA), which operates Head Start in Sacramento County. The survey sought to elicit information about current working conditions, job satisfaction, and retention.

A total of 224 child care workers responded to the survey. Collection of demographic information was anonymous and optional. Responses to two introductory questions are summarized below:

- The majority of respondents (94%) identified as women.
- More than half of respondents (58%) reside in the city of Sacramento. The rest reside throughout Sacramento County.

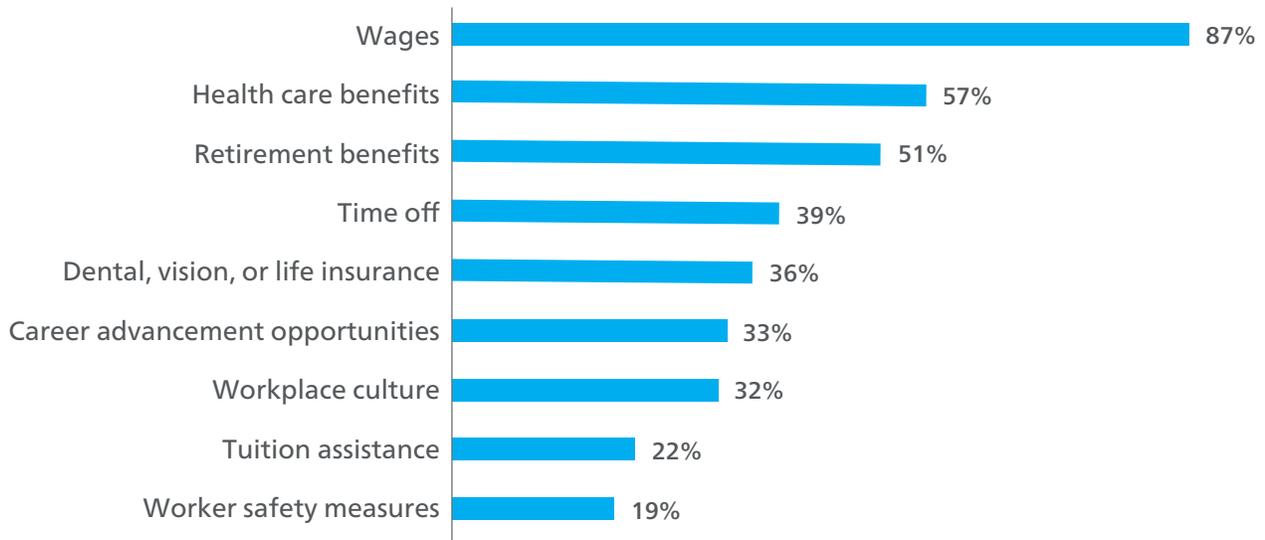
Respondents mostly come from older age categories (Exhibit 33). There were no respondents in the 18-to-24 category. The largest share of respondents were in the 45-to-54 category (35.2%). There were significant numbers of respondents in the 35-to-44 category (25.1%) and the 55-to-65 category (21.1%).

Exhibit 33. Respondents by age (n = 227)



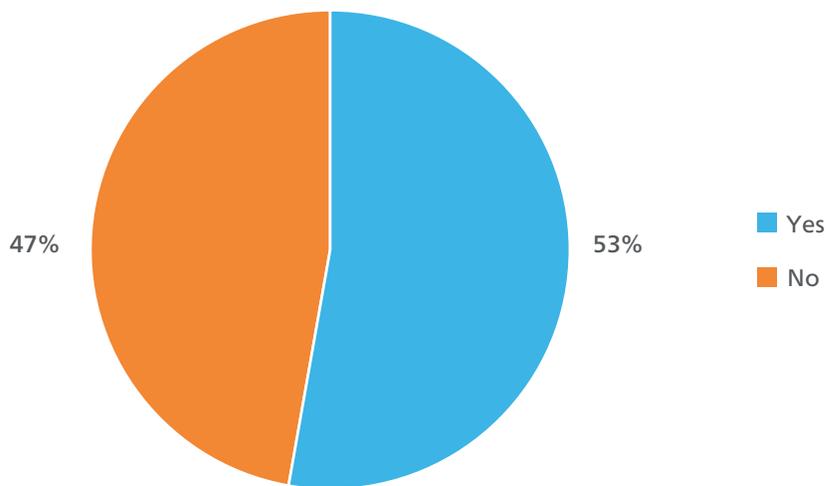
Respondents were asked to indicate needed improvements in working conditions and benefits (Exhibit 34). A large majority (87%) cited increased wages. More than half cited health care benefits (57%) and retirement benefits (51%). Fewer than half cited dental, vision, and life insurance (36%) and career advancement opportunities (33%).

Exhibit 34. What benefits or working conditions could be improved? (n = 223)



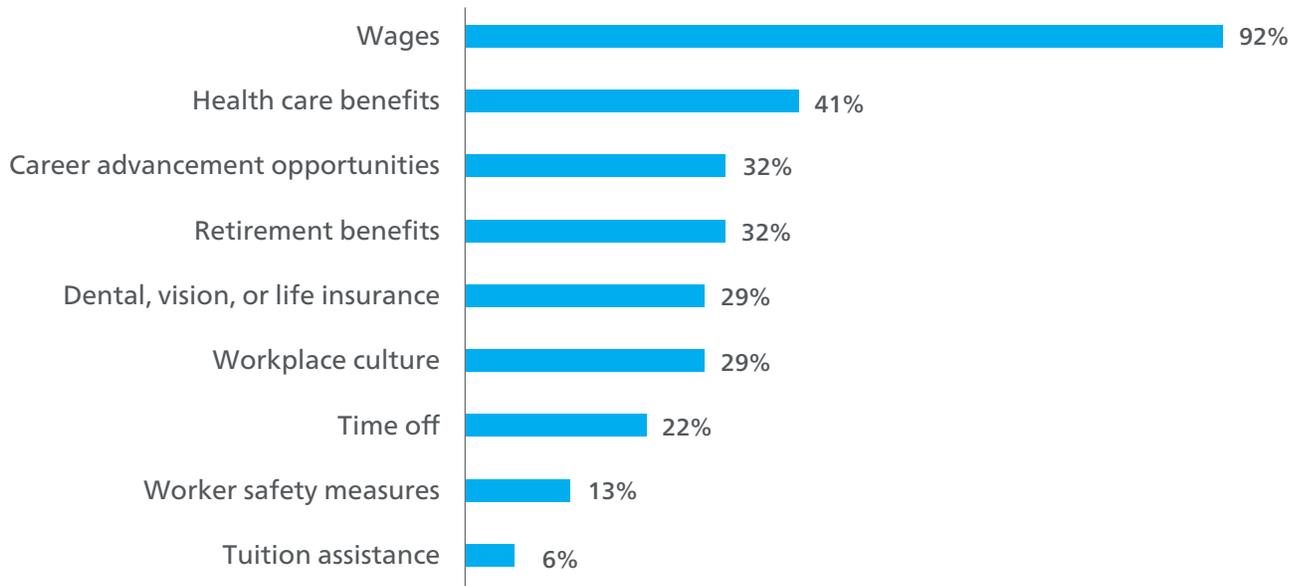
Just more than half of survey respondents (53%) said they had considered changing careers (Exhibit 35).

Exhibit 35. Have respondents considered changing careers? (n = 227)



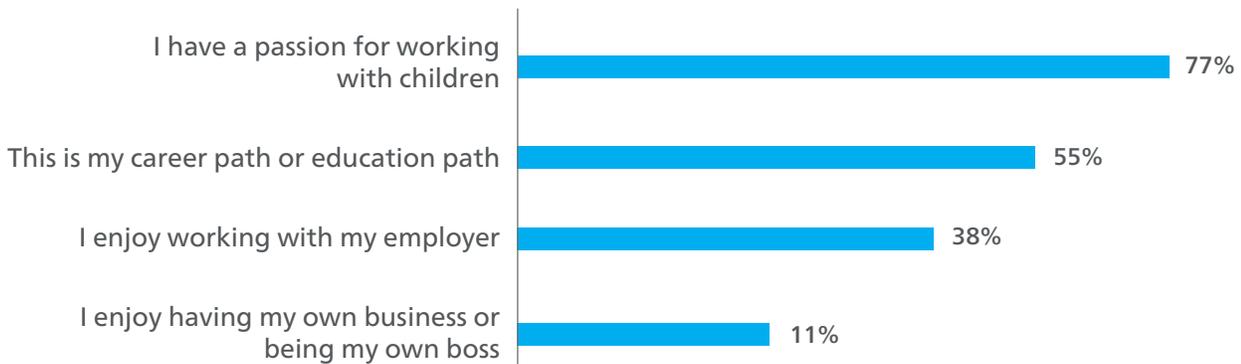
The primary reason for considering a career change was wages (92% of respondents) (Exhibit 36). Health care benefits was the second-most-cited reason (41%). Fewer than a third of respondents (32%) cited career advancement and retirement benefits.

Exhibit 36. Reasons that respondents have considered changing careers (n = 116)



Among respondents who have not considered changing careers, a large majority (77%) noted their passion for working with children (Exhibit 37). Just more than half (55%) said that early childhood education was their career or education path. Smaller numbers said they enjoy working with their employer (38%) or enjoy owning their own business (11%).

Exhibit 37. Reasons that respondents have not considered changing careers (n = 99)



CONCLUSION



The ECE industry—an industry that historically has struggled in California, the Sacramento region, and elsewhere—suffered during the pandemic. Many employers reported worsening recruitment and retention situations as the industry lost a third of its jobs overnight. By early 2022, the industry had recovered just 65% of the jobs lost during the pandemic, setting it on a 10-year path of job reductions. At the same time, the ECE industry in the Sacramento region maintained or slightly increased its overall licensed child care capacity. These two trends mean that the industry chronically operates in a situation of understaffing and that many facilities cannot serve their allowable, licensed capacity.

Wages and job quality pose a major concern for the industry. ECE teachers earn less than half the living wage levels for a one-adult, one-child household in the Sacramento region. According to the survey of child care workers, 9 of 10 who had considered leaving the field cited wages as their primary reason. The interviews of employers indicate that pathway supports for advancement, retention, and benefits are unevenly provided. The smallest employers do not offer these supports.

With planning of and funding for its UPK initiative, California promises to expand quality early childhood education and the number of good jobs that pay living wages with benefits. The rollout of transitional kindergarten to all 4-year-olds by 2025 will expand the ECE workforce and create a need to backfill positions for teachers who transition into positions that pay wages on par with wages for elementary school teachers.

These trends mean that workforce development and education and training institutions will be called on to expand their role as key stakeholders and supports. These institutions will create advancement pathways and will be responsible for better marketing the field and education opportunities to new entrants and the existing workforce.



FINDINGS



Summarized below are the main research findings and recommendations for ECE workforce stakeholders and education and training providers in Sacramento County and the Sacramento region.

Reductions in the number of family child care homes offset gains made by child care centers in both numbers of facilities and capacity (slots) between 2014 and 2021.

Pandemic relief and other measures boosted centers and family child care homes between 2019 and 2021, but the reductions in family child care homes prior to the pandemic were so severe that the increases did not return numbers above 2014 levels. In 2021, there were only 1.6% more spaces (including centers and family child care homes) in Sacramento County than in 2014. There were 0.7% fewer spaces in the region.

Most licensed child care spaces (65%) in Sacramento County are in child care centers. A majority of this capacity is in centers funded by fees and tuition. The vast majority of center spaces are designated for children age 2 to 5.

The more than 400 child care centers have 65% of the total licensed capacity in Sacramento County. Just 11.5% of licensed center spaces are designated for infants, whereas 88.5% of total center capacity is designated for preschool-age children. Private-pay centers account for most child care center facilities (57% of facilities) and capacity (66% of total capacity). The remainder receive public funding, mostly from Head Start and state preschool.

In Sacramento County, the number of licensed spaces equals just a third of the population of children age 0 to 5. The figure is similar for the Sacramento region. These figures have remained about the same since 2014.

Sacramento County and the Sacramento region have licensed spaces that cover slightly larger shares than the state overall. But at all study geographies, the shares are remarkably consistent. The population of children age 0 to 5 in Sacramento County and the Sacramento region did not significantly change between 2014 and 2020.

In 2021, the child care industry in Sacramento County and the Sacramento region was licensed to serve nearly the same number of children as it did in 2014, but with significantly fewer staff.

Between March 2020 and April 2020, the child care services industry in California lost nearly 34% of its employment, wiping out gains made between 2015 and 2019 and resetting the industry on a 10-year course of job losses. In 2020, Sacramento County's child care services industry had 21% fewer jobs than it did in 2010. The region's deficit was similar. Monthly industry data for the state showed that the industry rebounded in the months after the pandemic, but by January 2022, it had regained only 65% of lost jobs. The number of total licensed capacity (slots) in 2021 was similar to the number in 2014.

The contrast between industry trend data showing jobs losses and a modeled scenario showing jobs increases indicates that the ECE industry operates in a state of chronic workforce shortages.

The modeled scenario indicates that between 2014 and 2021 Sacramento County should have increased its ECE workforce by 5.4% and the region should have increased its ECE workforce by 1.3%. Instead, industry data reveal significant jobs losses. The contrast means that the ECE industry likely operates with far fewer workers than it needs.

Two-thirds of family child care home providers and 7 of 10 center teachers are nonwhite. Only 4 of 10 center directors are nonwhite. Latinas make up the largest number of nonwhites.

In the Central region that includes Sacramento County, 63% of family child care home providers and 65% of center teaching staff are in nonwhite categories, of which the largest nonwhite category is Latina; 39% of family child care home providers are Latina; and 43% of center teaching staff are Latina. The other minority groups make up much smaller shares of providers. By contrast, just 39% of center directors are in nonwhite categories; 23% of center directors are Latina, and 59% of center directors are white.

A large share of the child care workforce, especially family child care home providers and center directors, is over age 40.

According to the data, 80% of the family child care home workforce is age 40 and older. Just over half (52%) of center teachers are age 40 and older. Just 3% of family home providers and center directors are under age 30.

The ECE workforce is highly educated, but a significant share of the workforce has not had the opportunity to access postsecondary education.

More than half the workforce, including family child care home providers and center assistants, has an associate or bachelor's degree. As many as 8 in 10 child care workers (including license-exempt employers) have no education beyond high school. When comparing educational attainment data to the demographics of the ECE workforce indicates that nonwhites, especially Latinas, have not accessed education and training at the same level as whites.

The ECE workforce in Sacramento County and the Sacramento region earn significantly less than the living wage and the self-sufficiency wage. Its wages are also significantly less than those of kindergarten teachers.

Median hourly wages for child care workers in Sacramento County (\$13.74) are just 37% of the living wage for a one-adult, one-child household (\$37.27). Preschool teachers' median hourly earnings (\$16.86) are just 45% of that wage. Child care administrators' median hourly earnings (\$22.71) are only 60% of the living wage. Child care workers' median hourly wages are just 36% of kindergarten teachers' median wage in Sacramento County (\$37.90). Preschool teachers earn 44% of the median wage of kindergarten teachers.

The Sacramento region has robust ECE programs at all eight community colleges and California State University–Sacramento. On average, these programs award 1,000 certificates and degrees, and they have steadily increased awards production since 2013.

In addition to coursework that qualifies students to be assistant teachers and teachers, all the region's community college programs offer transferrable associate degrees that articulate with the California State University System. On average annually for the most recent three academic years, the community colleges conferred 610 certificates and degrees in ECE disciplines. Awards totals from the most recent year reveal an increase of 20% over totals from the 2013–2014 academic year. On average, California State University–Sacramento conferred 461 bachelor's and master's degrees in ECE fields. The most recent year's totals reveal an increase of 98% over totals from 2013–2014.

California's effort to expand early childhood education in its Universal Prekindergarten (UPK) initiative promises to improve wages and job quality, while also increasing workforce demand.

To serve every 4-year-old in the state, the program will have to triple its capacity (from 100,000 to 300,000 children) by the 2025–2026 school year.⁴⁵ To meet this capacity target, the UC–Berkeley Center for the Study of Child Care Employment projects that 8,000 to 11,000 new transitional kindergarten teachers and 26,000 new aides will be needed. The demand will create a need to backfill positions for early childhood educators moving into new roles. A revised credential, PK–3 Early Childhood Education Specialist Credential, seeks to provide an enhanced pathway to meet the demand for teachers with a bachelor's degree and teaching credential.

Interviews and survey data reveal that the pandemic worsened recruitment and hiring challenges. Workers endure poor job quality and face uneven advancement opportunities.

Half the employers interviewed reported significant turnover during the pandemic. They also reported difficulty finding candidates with sufficient qualifications to meet regulatory requirements, especially requirements for teacher aides and teachers. Half of workers responding to a survey have considered changing careers, citing low wages and a lack of benefits. The findings reveal that advancement pathway supports vary from employer to employer, representing a concern for a significant share of the workforce.



45. It should be noted that state preschool enrollments declined during the pandemic. See National Institute for Early Education Research, "The State of California Yearbook 2021," State Profiles, California, https://nieer.org/wp-content/uploads/2022/04/California_YB2021.pdf.

RECOMMENDATIONS



The following recommendations were developed with the input of the Early Learning and Child Care Task Force working group that met in the first half of 2022. They underscore the need to pursue education program and employment solutions alongside state policy goals to improve job quality and working conditions.

The Sacramento region’s ECE workforce stakeholders should continue to track the state’s Universal Prekindergarten initiative, to implement other key measures that promise to increase ECE wages and job quality, and to coordinate programmatic responses where appropriate.

The state’s efforts to expand transitional kindergarten and state preschool through the UPK initiative promises to increase the number of ECE positions that pay living wages. The initiative could offer significant opportunity to expand professional teacher pathways that lead to teaching positions in public schools. Reform of standard reimbursement rates represents another potential opportunity to increase wages in the field.⁴⁶ Other policies, including tax credits, one-time investments and stipends, or other local public finance mechanisms, may also offer solutions.⁴⁷

To remedy existing staffing shortages and meet projected demand for transitional kindergarten, the region’s education and training institutions should accelerate awards production and further assess the need for nontraditional, online, and asynchronous coursework integrated into work.

The chronic shortage of ECE workers in the Sacramento region was exacerbated during the pandemic by turnover and hiring challenges. Retirements pose a significant and ongoing threat. To address these issues, the region’s colleges and universities can accelerate their awards production and expand offerings to target ECE teacher aides and assistants, teachers, supervisors, and transitional kindergarten positions. There are existing or projected shortages in all these areas. To better accommodate underrepresented students and working students, training and education providers should continue enhancing nontraditional delivery modes and other ways to complete coursework and obtain permits and credentials. They might consider online and asynchronous training, enhanced mentorship, credit for prior learning, and other best practices. They should accommodate the schedules of early childhood educators currently working in the field.

Education and training institutions should expand workforce pathway supports for entry-level ECE teachers.

The demographics data on ECE staff indicate that educational opportunities and access to higher-paying positions have not been as readily available to nonwhite workers, who represent a key target for recruitment into credential programs.⁴⁸ The task force working group identified several key pathway supports for nonwhite students and workers: basic skills support for math, science, and English; tutoring in these and specialized subjects; mentorship from experienced advisers; and cohort-based learning for peer support. The working group also cited expansion of education stipends and tuition reimbursement as ways to reduce costs for students concurrently working in the field.⁴⁹

Workforce stakeholders should provide specific pathway supports for underrepresented groups, in particular for positions requiring bachelor’s degrees and multi-subject teaching credentials.

The ECE workforce often reflects the diversity of the communities of children being served. That said, nonwhite workers, especially Latinas, are underrepresented in supervisory positions that require bachelor’s degrees. These positions pay more than teacher positions. Remedying this situation means creating and implementing a strategy to recruit a more ethnically diverse group for positions requiring bachelor’s degrees and providing pathway supports that meet its needs. Some of these supports are mentioned above: cohort-based learning, contextualized and accelerated math and English, and mentorship and tutoring. SETA, Child Action, Inc, and the region’s community colleges and universities have long-standing relationships in underserved communities. Their service capacity should be enhanced.

46. Policymakers and stakeholders continue to grapple with reimbursement rates for subsidized child care and wage disparities between ECE teachers and ECE staff. The state established a workgroup to assess the needs of reimbursement and compensation. See California Department of Social Services, *A Report by the Rate and Quality Workgroup*, August 2022, <https://www.cdss.ca.gov/inforesources/child-care-and-development/rate-reform-and-quality>.

47. Erik Saucedo and Kristin Schumacher, “California’s Subsidized Child Care Providers Are Overdue for Pay Raise,” California Budget & Policy Center, April 2022, <https://calbudgetcenter.org/resources/californias-subsidized-child-care-providers-are-overdue-for-pay-raise/>.

48. Family, friends, and neighbors, many of whom work in a license-exempt setting, may represent recruitment opportunities for training and education.

49. Washington D.C. established the D.C. Futures program (<https://osse.dc.gov/dcfutures>) to support stipends and tuition reimbursement with federal recovery act dollars.



Workforce partners should develop materials, resources, and campaigns to better communicate education sequences and career pathway opportunities.

Existing materials on coursework sequences and permitting requirements are confusing for career explorers, students, and professionals navigating the system. Many of these resources are out of date and contain conflicting information. Industry and education and training organizations need understandable materials on education and training requirements and commensurate career pathways. These materials should be made readily available to prospective students and workers seeking promotion. Local workforce stakeholders can work with professional marketers to leverage new materials for recruitment and career pathways. The materials should be made accessible to workers with disabilities and in the languages spoken in the communities being served.

The workforce education and training community should expand and enhance existing teacher preparation programs to increase the number of ECE teachers who possess multiple-subject teaching credentials.

The Sacramento region's community colleges and universities are well-positioned to leverage preparation initiatives: all eight community colleges in the region have transferable associate degrees that are articulated with the California State University system. Enhancing connections between ECE programs and existing teacher pathway pipelines, such as the Community Colleges Teacher Preparation Program (CCCTPP) and The California State University's Teacher and Education Preparation initiative, is essential to meeting the demand brought on by universal prekindergarten and transitional kindergarten.⁵⁰ Sacramento State University's Accelerated Child Development and Teaching (ACT) program prepares ECE teachers with a multiple-subject teaching credential.⁵¹ Stipends and tuition reimbursement programs can help students and workers earn bachelor's degrees and teaching credentials.

Education and workforce stakeholders should expand work-based learning and credit for prior learning, two mechanisms that can accelerate education and permit completion, job placement, and advancement.

Entry-level child care workers gain experience that should count toward state permitting requirements. Some of the experience may also count toward coursework for educational requirements. The community colleges should explore opportunities to expand credit for prior learning arrangements to accelerate preparation when appropriate.⁵² Community colleges, universities, and workforce development boards have extensive partnerships with ECE providers and employer intermediaries like Child Action, Inc. that should be further leveraged to expand work-based learning opportunities. Emerging apprenticeships and other targeted work-based learning programs at the City of Sacramento, SETA, American River College, and elsewhere should continue to be documented, shared and, where appropriate, replicated.

The state and region should increase access to business services and expanded workforce supports from third parties for family child care home providers and small child care centers.

Child Action, Inc. provides crucial startup support with state and local funding (including licensing support and access to health and safety training). SETA and California Capital's Women's Business Center also provide business services that enable providers to start and grow their businesses. These programs and others may need added support and enhancements to help the region's family child care homes and small center facilities improve job quality, reduce turnover, and improve working conditions.

50. California Community Colleges Chancellor's Office, "Teacher Preparation Programs," <http://teacherprepprogram.org/>, and The California State University, "Teacher and Educator Preparation," <https://www.calstate.edu/impact-of-the-csu/teacher-education>.

51. Sacramento State, "Pathways to teaching credentials at Sacramento State," <https://www.csus.edu/college/education/teaching-credentials/teach.html>.

52. The Success Center for the California Community Colleges supports the Credit for Prior Learning Initiative: <https://successcenter.cccco.edu/Strategic-Projects/Credit-for-Prior-Learning-Initiative>.

APPENDICES



Appendix A: Task force working group partners

The Center of Excellence and Valley Vision acknowledge the contributions of the following Early Learning and Child Care Task Force working group partners:

City of Sacramento

Janine Cooper, Child Care Project Manager and Co-chair of the Early Learning and Child Care Task Force

Sacramento Employment and Training Agency (SETA)

Denise Lee, Deputy Director, Children and Family Services, and Co-chair of the Early Learning and Child Care Task Force
Roy Kim, Deputy Director, Workforce Development, SETA/Sacramento Works

Child Action, Inc.

Kelli Newman, Community Services Associate Manager
Heidi Keiser, Public Policy Officer
Julie Smith, Communications Officer

Sacramento County Office of Education (SCOE)

Julie Montali, Executive Director, Early Learning
Christine Smith, Director
Linnea Hathaway, Project Specialist
Emma Baier, Project Specialist

Greater Sacramento region community colleges early childhood education programs

American River College
Cosumnes River College
Folsom Lake College
Lake Tahoe Community College
Sacramento City College
Sierra College
Woodland Community College
Yuba College

Child Action, Inc. provided extensive technical assistance, including for data analysis of child care facilities in Sacramento County and report feedback.

Dr. Kevin Ferreira Van Leer, Assistant Professor in Child & Adolescent Development at California State University—Sacramento reviewed the study and provided feedback on it.

Dr. Yoonjeon Kim, Lead Research Analyst, and Elena Montoya, Senior Research and Policy Associate at the Center for the Study of Child Care Employment at UC–Berkeley, provided technical assistance on employment estimates and demographics data.

Community college program representatives reviewed the program asset analysis, contributed interviews, and participated in the workgroup.

Appendix B: Methodology

Study geography

The report places some emphasis on Sacramento County and compares data for that county with data for the six-county Greater Sacramento region and California. The six counties are El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba. The study includes an analysis of facilities, capacity, and population at the zip code level in Sacramento County in Appendix C.

Focus on children age 0 to 5

The analysis focused on child care for children ages 0 to 5 and includes neither data nor information on after-school or other programs for school-age children. The data also do not cover 5-year-olds in kindergarten. Facilities numbers and capacity refer to “infants” (known in the industry as “infants and toddlers”), or children 0 to 23 months old, and to preschool-age children, or children 2 to 5 years old.

Regulatory overview

The study focused on formal, licensed child care facilities, which are subject to state regulations (Title 22) as well as to additional state regulations if they receive state preschool funds or other specified state funding (Title 5) and to federal regulations if they are funded by Head Start or CalWORKS. These regulations mandate specific education and training qualifications. The research made use of practice literature and agency materials to outline funding programs and workforce qualifications.

License-exempt child care, including care provided by friends, family, and neighbors and by license-exempt programs like gyms and crisis centers, provide care for about two-thirds of children in California. No comprehensive data are available for these activities, and they were not a focus of the study.

Industry overview

Using the California Child Care Resource & Referral Network’s data and policy literature, the analysis outlined the organization of the ECE industry, describing child care centers, including those funded by public sources (state preschool and Head Start), and family child care homes, small businesses run by owners. The overview describes license-exempt child care activities, though data on these activities are generally not available.

Facility and capacity (slots) trends

The research analyzed data from the California Child Care Resource & Referral Network’s data tool, comparing data for the study geographies between 2014 and 2021. The study provided more detailed analysis of Sacramento County’s child care facilities, using data from May 2022 from Child Action, Inc., the county’s resource and referral organization. The detailed data enabled up-to-date analysis of facilities by public funding source (Head Start, state preschool, General Child Care Fund), ages served (infant and preschool), and zip code. Child Action, Inc.’s data on family child care homes includes data on the number and size of facilities, but not ages of children served and funding sources. The analysis assumes that there are 8 spaces in small child care homes and 14 in large child care homes, though actual capacity is regulated on the basis of the ages of children served. The analysis does not include data on license-exempt facilities, such as those offering after-school programs or homeless programs. Nor does it include data on family, friend, and neighbor providers.

Population

The research used demographic and population data from the California Department of Finance to show population trends for children ages 0 to 1 and ages 2 to 5 between 2014 and 2020. In comparing population data to capacity (slots) in the study geographies, it followed the practice of the California Child Care Resource & Referral Network Child Care Portfolio by combining totals of children age 0 to 1 and children age 2 to 5. Data availability prevented a gap analysis for infant and toddlers separate from preschool-age children. Appendix C includes a comparison of data on facilities and capacity by zip code to population totals from the American Community Survey. The appendix also includes data from an assessment performed by the Local Child Care and Development Planning Council, led by the Sacramento County Office of Education.⁵³

53. The council’s analysis designates priority levels for zip codes on the basis of the difference between the population of children and the number of licensed slots. Appendix C refers to these priority levels.

Industry employment trends

The research compared three industry analyses: an annual analysis of industry jobs between 2010 and 2020 using Emsi data; an annual index of industry jobs between 2015 and 2020, also using Emsi data; and a monthly total between January 2019 and January 2022 using the Current Employment Statistics data available from the California Employment Development Department’s Labor Market Information Division (LMID). The analyses illuminate long-term industry trends, long-term comparative impacts from the pandemic, and short-term, recent recovery from the pandemic.

Jobs estimates

The analysis of jobs counts used staffing estimates established in surveys conducted by the Center for the Study of Child Care Employment (CSCCE) at UC–Berkeley.⁵⁵ The estimates were applied to the number of facilities to model the size of the child care workforce in centers and family child care homes. They also were used to estimate the number of jobs in specific categories, including teacher’s aide and assistant teacher, teacher, and center supervisor/director. For family child care homes, the analysis estimated the number of assistants and providers (owners). The COE calculated the average number of assistants on the basis of the high and low estimates given in the study. Analysis of these jobs categories, whether in family child care homes or licensed child care facilities, is not possible using government and private sources for industry and occupational data. Exhibits B1 and B2 show the number of jobs per facility used in the calculations.

Exhibit B1. Jobs estimates per early childhood education center and total employment calculation

Assistant teachers	Teachers	Center directors	Centers total
$3.1 * \# \text{ of centers} = x$	$6.2 * \# \text{ of centers} = x$	$0.9 * \# \text{ of centers} = x$	Assistant total + teacher total + director total = x

Exhibit B2. Jobs estimates per family child care home and total employment calculation

Paid assistants	Providers/owners	FCC total
$0.49 * \# \text{ of FCC homes} = x$	$1.0 * \# \text{ of FCC homes} = x$	Paid assistants total + providers total = x

Workforce demographics

The analysis incorporated findings on workforce demographics from surveys conducted in 2020 by the CSCCE. The report uses findings for the Central region, which includes Sacramento County and the Southern San Joaquin Valley. The other five counties in the Sacramento region are included in the Northern region, which includes much of rural Northern California. The data include a demographic breakdown of the workforce according to gender, race/ethnicity, age, and foreign-born status. Some of the data reflect specific jobs categories: center teaching staff, center directors, and family child care home providers.

Educational attainment

Data on the educational attainment of the child care workforce come from two sources. The first uses one-year estimates from the U.S. Census American Community Survey’s Public Use Micro Data Areas (PUMAs) for the area overlapping Sacramento County. The data reflect the occupational categories that best approximate the child care workforce in Sacramento County. The U.S. Census data capture child care workers in settings other than licensed facilities; the data also capture state elementary schools that require bachelor’s degrees as part of credential programs. The second source again uses data for the Central region from CSCCE’s 2020 survey—data focused on the ECE workforce. The data show educational attainment in broad categories for licensed family child care home providers, teacher aides/assistants, center teachers, and center directors.

Wages and self-sufficiency standards

The research used occupational data from Emsi to compare the median hourly wages for child care-related occupations and kindergarten and elementary school teachers in the study geographies. It then compared median hourly wages to self-sufficiency and living wage standards for a one-adult, one-child household. The living wage calculator comes from the Massachusetts Institute of Technology. The Self-sufficiency Standard comes from the Center for Women’s Welfare at the University of Washington’s School of Social Work. Occupation data are generalized across child care organizations, which may include license-exempt facilities.

55. Marcy Whitebrook et al. “California Early Care and Education Workforce Study: Licensed Family Child Care Providers, Statewide 2006,” Center for the Study of Child Care Employment, 2006, <https://csce.berkeley.edu/publications/report/california-early-care-and-education-workforce-study-licensed-family-child-care-providers-statewide-2006/>.



Education and training assets and trends

The analysis outlined the education and experience qualifications required under state (Title 22 and Title 5) and federal regulations (Head Start). Because education qualifications are met with coursework and award completion at community colleges and universities, the asset inventory focused on these institutions.

The analysis summarized awards in ECE-related programs, averaging them over the most recent three academic years. For California State University–Sacramento, where industry-specific bachelor’s and master’s degrees are awarded, the analysis used Emsi’s programs tool that draws on the Integrated Post-secondary Education Data System (IPEDS). Community college awards data come from the California Community Colleges Chancellor’s Office DataMart. The analysis presents trends reflecting annual trends for all institutions analyzed from the 2013–2014 to the 2020–2021 academic years.

Employer interviews

Between May 17 and June 9, 2022, Valley Vision conducted interviews with 11 employers familiar with workforce issues in their organizations. The interviews sought to elicit information on working conditions, including benefits and wages, hiring challenges, recruitment and retention strategies, and advancement pathways. Interviewees came from a range of organization types and sizes, from small family home businesses to large child care centers. Responses were collected via phone calls and email. Appendix D1 lists the interview questions.

Child care worker survey

The study workgroup sought to better understand the working conditions affecting recruitment and retention. Valley Vision led the creation and dissemination of an electronic survey conducted between April 27 and July 11, 2022. The survey was distributed via email through Child Action, Inc. and SETA to current and former child care workers, 224 of whom responded. Appendix D2 contains the survey instrument questions and answer choices.

Appendix C: Facilities and capacity by zip code in Sacramento County, LPC priority level, and ACS population tables

Appendix C1 breaks out site and capacity data from Child Action, Inc. for the zip codes in Sacramento County to reveal totals for sites by the ages of children served. It includes data from Sacramento County’s Local Child Care and Development Planning Council at SCOE for the 2020–2021 school year. The planning council compares the number of income-eligible children (for Title 5 programs) in each zip code with the number of available full-time and part-time licensed spaces in state preschool programs. The data are for preschool-age children age 3 to 5 and infants and toddlers age 0 to 2. Head Start and transitional kindergarten counts are not included. Scores of 1 or 2 indicate zip codes that are underserved. Consult the local planning council for more information on scoring and eligibility criteria.

Exhibit C1. Licensed child care centers, number of facilities, capacity (slots) by age level, May 2022, and local planning council priority level, 2020–2021

Zip Code	Preschool only		Infant only		Infant and preschool		State preschool 2020–2021 priority	CTTR infant toddler 2020 priority
	Sites	Capacity	Sites	Capacity	Sites	Capacity		
95608	14	979	-	-	9	564	3	1
95610	9	447	1	42	8	750	1	1
95615	-	-	-	-	1	77	3	3
95621	4	126	-	-	2	150	1	1
95624	11	604	-	-	4	398	1	1
95626	1	22	-	-	-	-	3	3
95628	12	456	1	16	2	143	2	1
95630	11	520	-	-	11	1,396	2	1
95632	4	334	-	-	1	72	2	1
95641	1	24	-	-	-	-	3	3
95652	-	-	-	-	-	-	-	-
95655	-	-	-	-	1	90	3	3
95660	10	429	1	25	2	62	1	1
95662	7	367	-	-	4	272	3	2
95670	13	499	-	-	5	471	3	1
95673	4	108	1	16	-	-	2	2
95683	2	49	1	14	-	-	3	3
95690	1	40	-	-	-	-	3	3
95693	1	14	-	-	-	-	3	3
95742	1	18	-	-	1	76	3	3
95757	4	105	-	-	-	-	2	1
95758	10	492	-	-	8	964	1	1
95811	1	20	-	-	-	-	3	3
95814	1	74	1	20	11	725	3	3
95815	8	396	-	-	2	112	3	1
95816	5	266	-	-	3	132	2	3
95817	8	362	-	-	1	100	1	2
95818	9	438	-	-	1	73	2	3

continued

Exhibit C1. Licensed child care centers, number of facilities, capacity (slots) by age level, May 2022, and local planning council priority level, 2020–2021 (continued)

Zip Code	Preschool only		Infant only		Infant and preschool		State preschool 2020–2021 priority	CCTR infant toddler 2020 priority
	Sites	Capacity	Sites	Capacity	Sites	Capacity		
95819	6	288	-	-	1	183	2	3
95820	9	391	1	40	2	83	1	1
95821	11	466	-	-	3	140	2	1
95822	14	596	-	-	7	361	3	1
95823	18	742	-	-	6	469	1	1
95824	7	206	-	-	4	276	1	1
95825	8	409	-	-	3	311	1	1
95826	3	72	-	-	1	30	1	1
95827	5	339	1	60	1	107	3	1
95828	8	300	-	-	3	294	1	1
95829	5	329	-	-	2	220	3	1
95831	6	239	-	-	3	418	2	1
95832	3	97	-	-	-	-	3	2
95833	8	313	-	-	4	456	2	1
95834	7	252	-	-	2	276	3	1
95835	4	108	-	-	3	514	1	1
95838	8	626	-	-	1	16	3	1
95841	-	-	-	-	1	102	1	1
95842	6	493	-	-	1	59	1	1
95843	5	226	-	-	2	269	1	1
95864	4	402	-	-	2	98	2	1
Total	297	14,083	8	233	129	11,309		

Sources: Child Action, Inc.; Sacramento County Office of Education, Local Child Care and Development Planning Council, https://www.scoe.net/divisions/ed_services/early_learning/lpc/



Appendix C2

Appendix C2 uses data from Child Action, Inc. for zip codes in Sacramento County to illustrate the number of facilities and spaces for family child care homes. The local planning council does not designate priority levels for these facilities. The analysis includes 1-year estimates from the U.S. Census American Community Survey for the population of children age 0 to 5 in each zip code (ZCTA) in Sacramento County for comparison.

Exhibit C2. Licensed family child care homes, number of facilities, capacity (slots) by facility type, May 2022, and population, 2020

Zip Code	Small FCC		Large FCC		2020 population (under 5 years old)
	Sites	Capacity	Sites	Capacity	
95608	37	296	8	112	3,362
95610	17	136	8	112	2,730
95615	-	-	-	-	75
95621	26	208	16	224	1,945
95624	37	296	22	308	3,805
95626	1	8	2	28	340
95628	20	160	14	196	1,953
95630	16	128	23	322	4,504
95632	10	80	13	182	2,076
95641	1	8	-	-	16
95652	1	8	-	-	21
95655	4	32	1	14	297
95660	30	240	13	182	3,026
95662	10	80	13	182	1,963
95670	33	264	12	168	4,187
95673	6	48	4	56	1,146
95683	2	16	-	-	261
95690	-	-	-	-	117
95693	-	-	-	-	264
95742	15	120	3	42	1,169
95757	29	232	22	308	3,312
95758	48	384	31	434	4,277
95811	3	24	-	-	160
95814	1	8	-	-	170
95815	8	64	3	42	1,840
95816	1	8	1	14	588
95817	5	40	-	-	541
95818	4	32	2	28	1,544
95819	2	16	2	28	1,161
95820	12	96	6	84	2,048
95821	68	544	7	98	2,647
95822	16	128	12	168	2,867
95823	47	376	22	308	6,757

continued

Exhibit C2. Licensed family child care homes, number of facilities, capacity (slots) by age level, May 2022, and local planning council priority level, 2020–2021 (continued)

Zip Code	Small FCC		Large FCC		2020 population (under 5 years old)
	Sites	Capacity	Sites	Capacity	
95824	6	48	5	70	2,358
95825	34	272	1	14	3,016
95826	16	128	11	154	2,274
95827	17	136	14	196	1,338
95828	27	216	21	294	3,621
95829	21	168	5	70	2,091
95831	14	112	14	196	2,981
95832	4	32	1	14	888
95833	23	184	25	350	3,174
95834	29	232	16	224	2,598
95835	43	344	33	462	2,213
95838	27	216	12	168	2,443
95841	12	96	13	182	1,617
95842	38	304	14	196	2,588
95843	49	392	28	392	3,450
95864	9	72	2	28	1,091
Total	879	7,032	475	6,650	98,454

Sources: Child Action, Inc.; Sacramento County Office of Education, Local Child Care and Development Planning Council , https://www.scoe.net/divisions/ed_services/early_learning/lpc/; U.S. Census Bureau, American Community Survey, 1-Year Estimates

Appendix D: Interview and survey questions and responses

Appendix D1: Interviews of employer representatives

Employer representatives were asked the following questions:

1. Please provide a description of your business, number of employees and number of children you serve. What types of positions do you have and how many of each position?
2. Do you currently have available slots for children? Are you unable to accept more children due to lack of qualified candidates?
3. Are you currently hiring? If so, for how many positions? What positions are the hardest to fill and why?
4. How are you recruiting current candidates? What platforms or tools are you using?
5. Can you tell us about any innovative/successful recruitment and retention strategies?
6. Has your staff retention and turnover been impacted since the start of the pandemic? Have you seen any leveling out or improvement in the last six months?
7. Do you offer career advancement opportunities at your organization? If so, please describe.
8. Please describe in detail the health care and other benefits you provide for your employees?

Appendix D2: Survey of child care workers

The survey of child care workers asked the following questions:

Demographics:

- Identify male, female, nonbinary, prefer not to answer
- Age
- Race/Ethnicity
- Place of residence (ZIP code)

Which best describes your current employment:

- Currently working in a preschool/child care setting
- Formerly worked in a preschool/child care setting

Currently working in a preschool/child care setting logic:

Have you considered changing careers?

- Yes
- No

If No (considered changing careers), why? (Check all that apply/Drop Down/Open?)

- Being able to work with my children
- I have a passion for working with children
- This is my career path or education path
- Other: _____

If Yes, what benefits or working conditions could be improved? (Drop down)

- Wages
- Tuition assistance
- Career advancement opportunities
- Workplace culture
- Time off
- Health care
- Retirement
- Worker safety measures
- Other: _____

Formerly working in a preschool/child care setting logic:

Which best describes your current employment status:

- Unemployed
- Currently working in a preschool/child care setting
- Working in another industry/occupation
- (Logic) What industry/occupation are you working in now? (Open Answer)

Which factors contributed to your decision to leave the industry?

- Low wages
- Lack of tuition assistance
- Lack of career advancement opportunities
- Poor workplace culture
- Lack of time off
- Lack of sufficient health care benefits
- Not enough retirement benefits
- Poor safety measures
- Retirement
- Other: _____

Would any of the following have encouraged you to stay working in early childhood careers?

- Increased wages
- Tuition assistance
- Career advancement opportunities
- Better workplace culture
- Additional time off
- Generous health care benefits
- Increased retirement benefits
- Stronger safety measures
- Retirement benefits
- Other: _____





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