

LABOR MARKET ANALYSIS

FOR PROGRAM RECOMMENDATION



CENTERS OF EXCELLENCE
FOR LABOR MARKET RESEARCH

EARLY CHILDHOOD CARE AND EDUCATION IN THE GREATER SACRAMENTO REGION

North (Greater Sacramento)
Center of Excellence

February 2024

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SUMMARY

The North (Greater Sacramento) Center of Excellence for Labor Market Research prepared this report to provide a labor market analysis of educational supply and occupational demand for middle-skilled careers in the North (Greater Sacramento) subregion. This report aims to determine if demand in the local labor market is unmet by the supply from existing community college programs and other postsecondary training providers.

This report primarily focuses on training that leads to jobs in middle-skilled occupations - jobs that typically require education beyond a high school diploma but less than a bachelor's degree - but may include higher-skilled occupations for training pathways that lead to a bachelor's degree. Lowered skilled occupations are rarely considered in this analysis due to the lessened barriers for entry-level work, such as no formal education and fewer on-the-job training requirements.

Key findings include:

- In 2022, the North (Greater Sacramento) subregion held 22,497 early childhood care and education jobs. These jobs are projected to increase by 3% over the next five years, adding 712 new jobs to the subregion by 2027.
- Over the next five years, early childhood care and education occupations are projected to have 3,239 annual openings in the North (Greater Sacramento) subregion.
- Entry-level (25th percentile) wage data shows that the early childhood care and education occupations included in this report earn \$14.03 to \$21.77 per hour. Three of the four occupations have hourly wages below the subregion's living wage of \$18.72 per hour. (See Appendix B for notes about the updated living wage).
- Awards data analysis shows that North (Greater Sacramento) training providers conferred an average of 669 awards in Child Development/Early Care and Education (TOP 1305.00) programs over the last three academic years.

Recommendations include:

- The North (Greater Sacramento) Center of Excellence recommends that community colleges develop new early childhood care and education programs and expand existing ones to meet local demand.
- Community colleges offering training related to preschool and daycare administrators should ensure their programs are articulated to four-year degree transfer pathways. While entry-level preschool and daycare administrator jobs typically require a minimum of a bachelor's degree, a significant proportion of workers in the field hold a master's degree or higher.

INTRODUCTION

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

- Education and Childcare Administrators, Preschool and Daycare (11-9031)
- Preschool Teachers, Except Special Education (25-2011)
- Teaching Assistants, Except Postsecondary (25-9045)
- Childcare Workers (39-9011)

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

- Child Development/Early Care and Education (1305.00)

The corresponding Classification of Instructional Program (CIP) title and code are:

- Early Childhood Education and Teaching (13.1210)

OCCUPATIONAL DEMAND

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

Exhibit 1. Employment and projected demand, 2022-2027

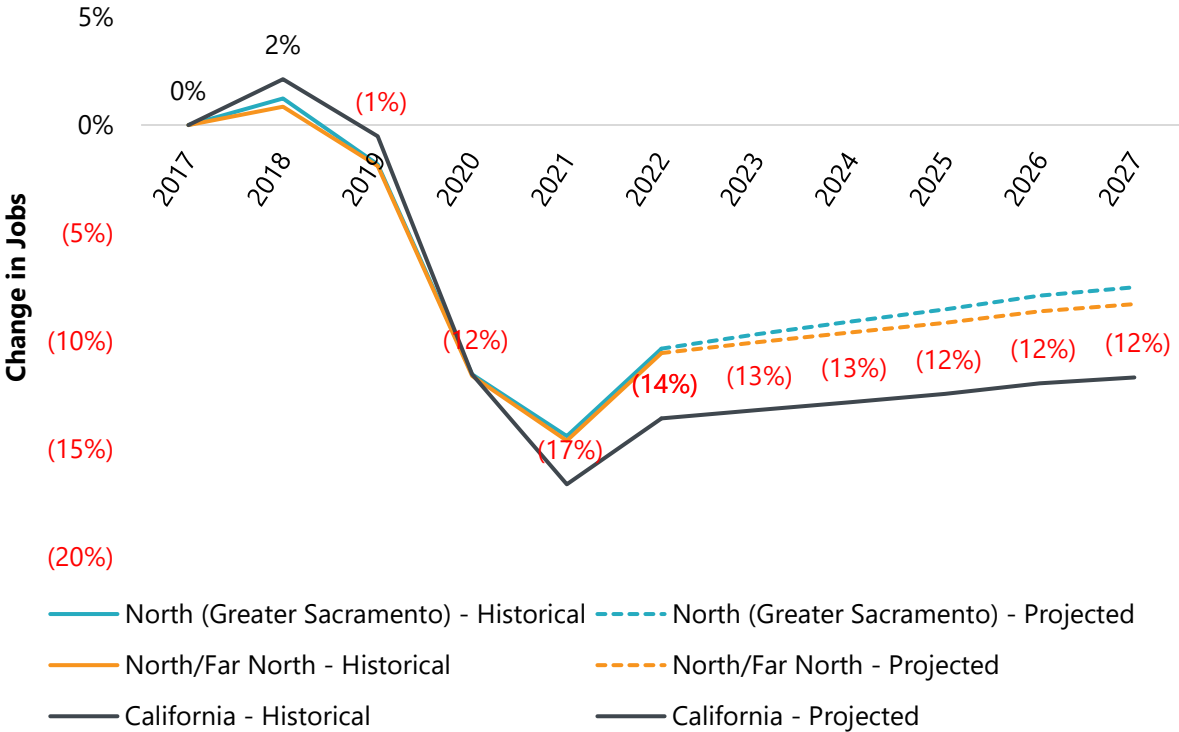
Occupation	2022 Jobs	2027 Jobs	2022-2027 Change	2022-2027 % Change	2022-2027 Annual Openings
Education and Childcare Administrators, Preschool and Daycare	588	597	10	2%	44
Preschool Teachers, Except Special Education	4,254	4,495	240	6%	515
Teaching Assistants, Except Postsecondary	9,858	10,543	686	7%	1,317
Childcare Workers	7,797	7,574	(223)	(3%)	1,363
North (Greater Sacramento)	22,497	23,209	712	3%	3,239
Education and Childcare Administrators, Preschool and Daycare	808	804	(4)	(1%)	58
Preschool Teachers, Except Special Education	5,591	5,844	252	5%	665
Teaching Assistants, Except Postsecondary	14,272	15,249	977	7%	1,906
Childcare Workers	10,362	9,922	(439)	(4%)	1,784
North/Far North	31,034	31,820	786	3%	4,414

¹ The North (Greater Sacramento) subregion covers seven counties, including El Dorado, Nevada, Placer, Sacramento, Sutter, Yolo, and Yuba.

Occupation	2022 Jobs	2027 Jobs	2022-2027 Change	2022-2027 % Change	2022-2027 Annual Openings
Education and Childcare Administrators, Preschool and Daycare	9,754	9,979	225	2%	732
Preschool Teachers, Except Special Education	62,061	65,850	3,789	6%	7,564
Teaching Assistants, Except Postsecondary	142,600	151,469	8,869	6%	18,819
Childcare Workers	158,617	153,907	(4,710)	(3%)	27,145
California	373,032	381,205	8,173	2%	54,260

Exhibit 2 compares the net changes in jobs between 2017 through 2022 and the projected changes through 2027. The rate of change is indexed to the total number of jobs in 2017.

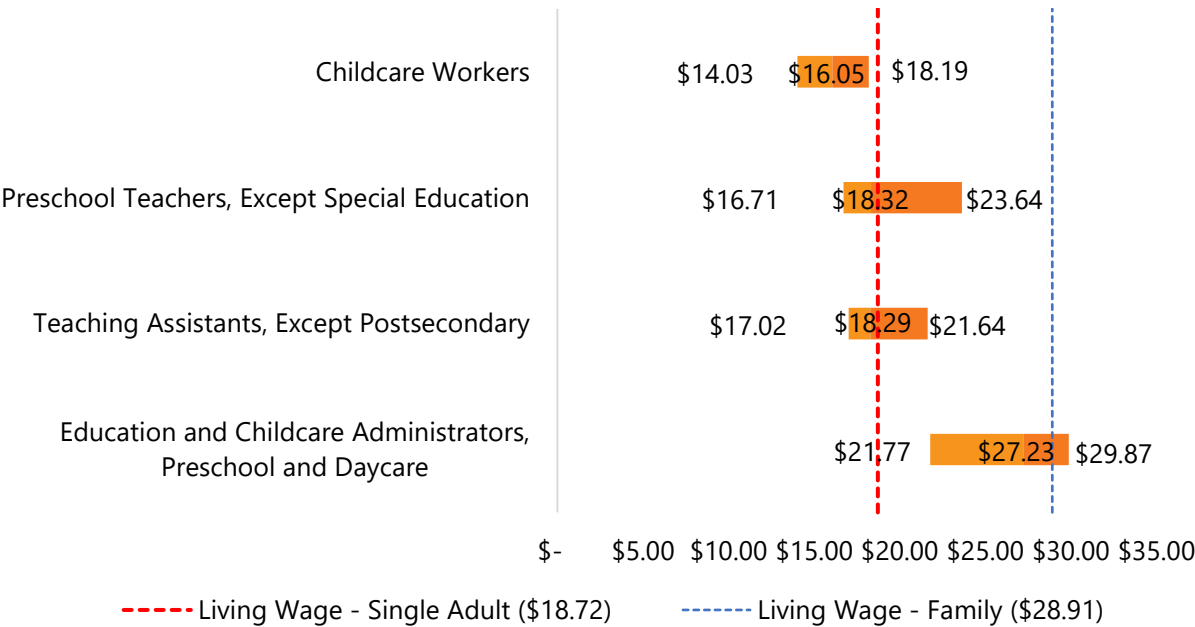
Exhibit 2. Changes in employment, 2017-2027



WAGES

Exhibit 3 compares the 25th percentile, median, and 75th percentile hourly wages for the four early childhood care and education occupations to the Greater Sacramento living wage for one working adult (\$18.72 per hour) and a small family (\$28.91 per hour).^{2,3} The 25th and 75th percentile hourly wages are used to estimate entry-level and experienced worker wages.

Exhibit 3. Hourly wages by occupation, 2022



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

³ A small family is defined as one working adult and one school aged child (between the ages of 5 and 12 years).

JOB POSTINGS

About Job Postings Analysis

This section analyzes recent data from online job postings. Online job postings may provide additional insight into recent changes in the labor market that are not captured by historical trends. However, job postings differ from labor market demand; demand is based on projected annual openings. Job postings should be used to inform community college curriculum development and identify potential employers for targeted experiential learning opportunities.

There are several limitations to analyzing and interpreting online job postings. Employers may post a position multiple times to increase the number of job applicants. Job postings may remain online after a business chooses not to fill a position. Employers may advertise one posting to fill multiple vacancies. And not all jobs are posted online.

The North COE identified 4,708 online job postings for the selected occupations in the seven-county Greater Sacramento subregion. Job posting data comes from Lightcast (formerly Emsi Burning Glass) and represents unique advertisements newly posted online during the last 12 months, from January through December 2023.

Top Employers and Job Titles

Exhibit 4 details the number of online job postings for the selected occupations.

Exhibit 4. Job postings by occupation

Occupation	Unique Job Postings	Share of Job Postings
Preschool Teachers, Except Special Education	2,017	43%
Teaching Assistants, Except Postsecondary	1,875	40%
Childcare Workers	608	13%
Education and Childcare Administrators, Preschool and Daycare	208	4%
Total Job Postings	4,708	100%

Exhibit 5 shows the top relevant job titles with the most job postings.

Exhibit 5. Top jobs titles

Job Title	Number of Job Postings
Preschool Teachers	436
Paraeducators	217
Infant/Toddler Teachers	178
Special Education Instructional Aides	166
Child Care Teachers	121
Paraprofessionals	118
Behavioral Aides	101
Instructional Assistants	101
Teachers	97
Instructional Aides	84
School Age Teachers	81
Preschool Teacher Assistants	79

Exhibit 6 shows the top relevant employers with the most job postings for the selected occupations.

Exhibit 6. Top Employers

Employer	Number of Job Postings
KinderCare Education	301
Sacramento City Unified School District	220
San Juan Unified School District	153
Cadence Education	115
Catalyst Family (aka Catalyst Kids)	105
Twin Rivers Unified School District	100
Yuba City Unified School District	91
Point Quest	89
FCUSD - Folsom High School	83
Learning Care Group	74

Top Skills and Qualifications

Exhibit 7 shows the top skills across three categories for the four early childhood care and education occupations: specialized, essential, and software skills.⁴

Exhibit 7. Most in-demand skills

Specialized Skills	Common Skills	Software Skills
Preschool Education	Teaching	Microsoft Outlook
Child Development	Communication	Microsoft Excel
Working with Children	English Language	Microsoft Word
Early Childhood Education	Customer Service	Microsoft Office
Lesson Planning	Planning	Student Information Systems
Special Education	Leadership	HyperText Markup Language (HTML)
Classroom Management	Mathematics	Microsoft PowerPoint
Individualized Education Programs (IEP)	Lifting Ability	Zoom (Video Conferencing Tool)
Pediatrics	Management	Spreadsheets
Psychology	Research	Google Workspace

⁴ Specialized skills are those primarily required to perform specific tasks in an occupation. Essential skills are typically related to employability. These are skills that are prevalent across many occupations, and include both interpersonal attributes and learned skills (aka “soft skills”). Software skills are specific to any software tool or programming component used to support a job.

Exhibit 8 shows the minimum education level preferred by employers for the four early childhood care and education occupations in the Greater Sacramento subregion.⁵

Exhibit 8. Employer-preferred education

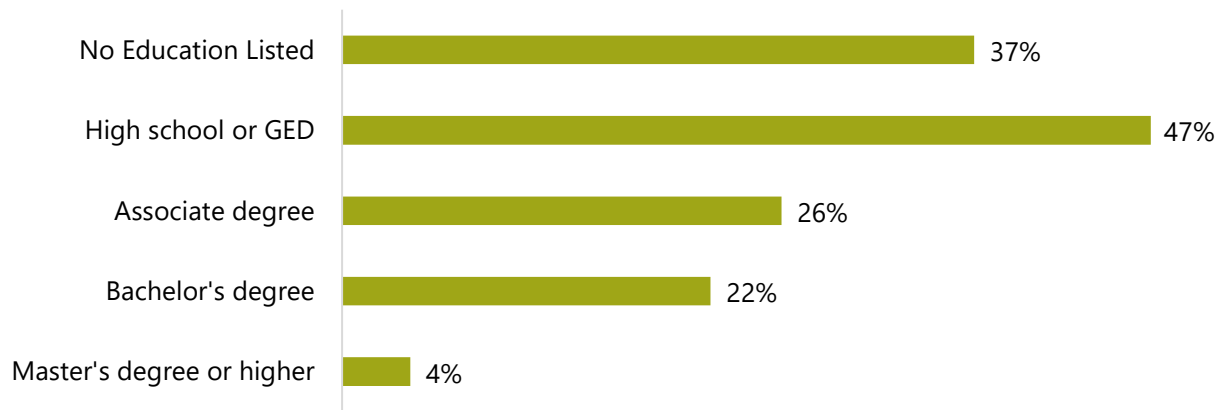
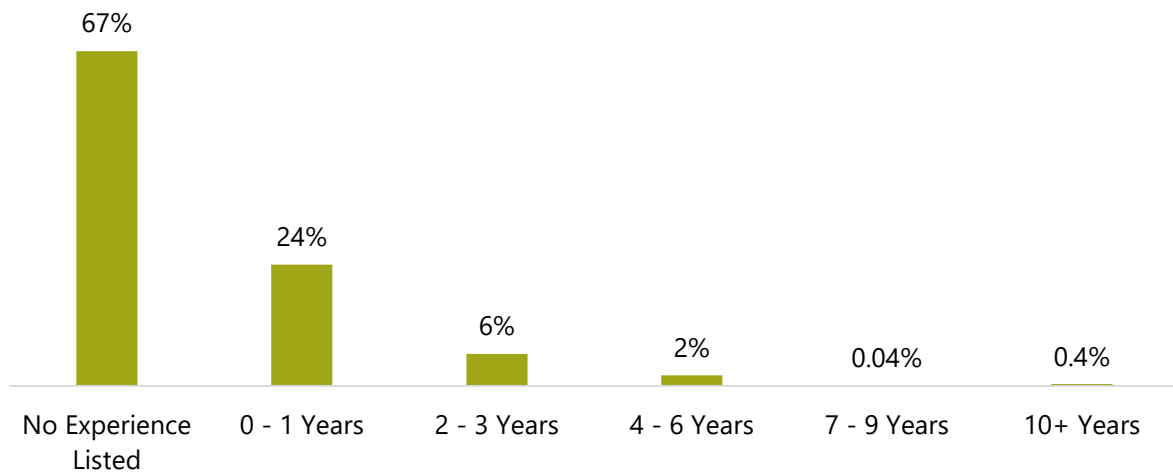


Exhibit 9 shows the minimum level of experience employers prefer for the four early childhood care and education occupations in the Greater Sacramento subregion.⁶

Exhibit 9. Employer-preferred job experience



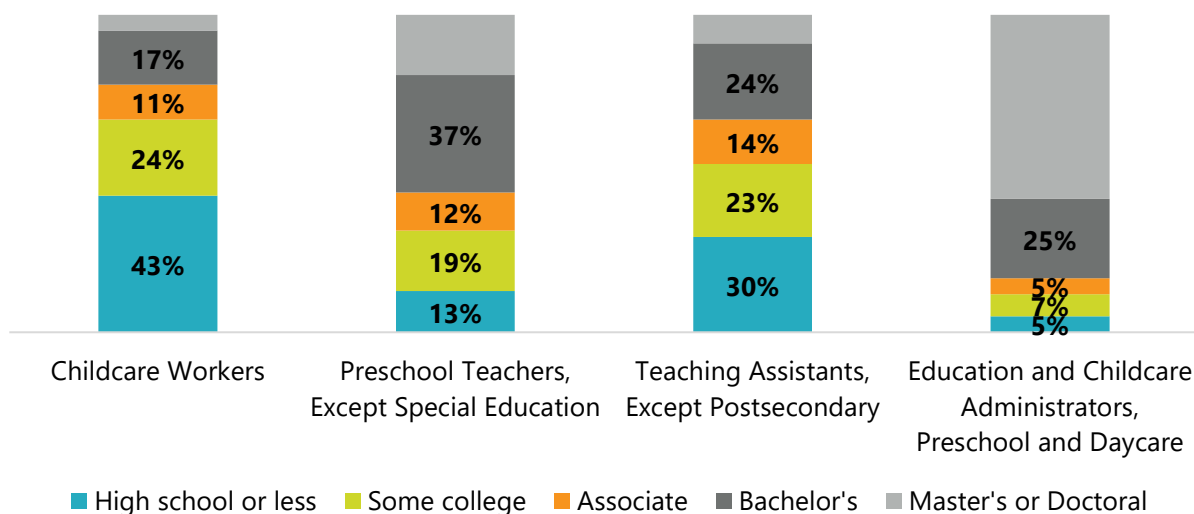
⁵ Employers may include more than one level of education as a hiring requirement in a job posting. As a result, the values in exhibit 8 may sum to greater than 100%.

⁶ Employers may include more than one level of experience as a hiring requirement in a job posting. As a result, the values in exhibit 9 may sum to greater than 100%.

EDUCATION AND TRAINING REQUIREMENTS

The U.S. Census Bureau collects data on the highest education level achieved by workers across all occupations. Exhibit 10 shows California's educational attainment of the current workforce in the selected occupations.

Exhibit 10. California educational attainment for early childhood care and education occupations, 2021



The U.S. Bureau of Labor Statistics (BLS) uses a categorical system to assign typical entry-level education and job requirements to each occupation for which the BLS publishes projection data. These categories include entry-level education, work experience in a related occupation, and on-the-job training. Exhibit 11 shows the typical entry-level job requirements for each occupation included in this report.

Exhibit 11. Typical entry-level job requirements

Occupation	Entry-level Education Requirements	Work Experience Requirements	On-The-Job Training Requirements
Childcare Workers	High school diploma or equivalent	None	Short-term
Preschool Teachers, Except Special Education	Associate degree	None	None
Teaching Assistants, Except Postsecondary	Some college, no degree	None	None
Education and Childcare Administrators, Preschool and Daycare	Bachelor's degree	Less than five years	None

EDUCATIONAL SUPPLY

Educational supply for an occupation can be estimated by analyzing the number of awards issued in related Taxonomy of Programs (TOP) or Classification of Instructional Programs (CIP) codes. Exhibit 12 shows the TOP and CIP codes for educational programs related to the four early childhood care and education occupations included in this report.

Exhibit 12. TOP and CIP codes for training programs related to early childhood care and education

TOP Programs and Codes	Aligned CIP Programs and Codes
Child Development/Early Care and Education (1305.00)	Early Childhood Education and Teaching (13.1210)

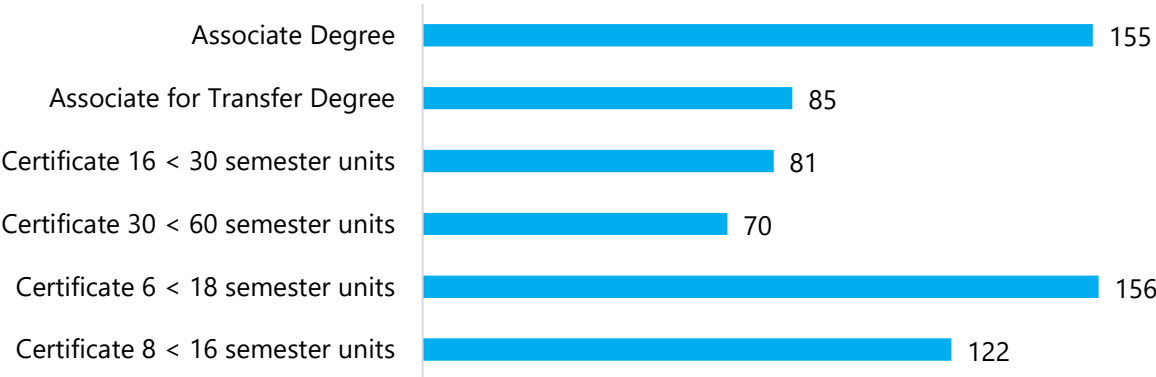
Community College Supply

Exhibits 13 and 14 compare the average number of certificates and degrees from the selected Greater Sacramento Community College programs over the last three academic years. Eight community colleges in the subregion awarded an average of 669 awards over the previous three academic years.

Exhibit 13. Annual average community college awards by program

Program - TOP Code	College	Annual Awards 2019-20	Annual Awards 2020-21	Annual Awards 2021-22	3-Yr Annual Awards Average
Child Development/Early Care and Education (1305.00)	American River	82	151	132	122
	Cosumnes River	64	74	81	73
	Folsom Lake	115	76	78	90
	Lake Tahoe	4	4	3	4
	Sacramento City	37	27	30	31
	Sierra	39	68	47	51
	Woodland	58	63	215	112
	Yuba	84	84	392	187
	Grand Total	483	547	978	669

Exhibit 14. Annual average community college awards by type, 2019-20 through 2021-22



Other Postsecondary Supply

Exhibit 15 compares the average number of degrees that non-community college training providers conferred in the Greater Sacramento subregion over the last two academic years. Please note that non-community college data lags by one year.

Exhibit 15. Other postsecondary awards by program

Program - CIP Code	Institution	Annual Awards 2019-20	Annual Awards 2020-21	2-Yr Annual Awards Average
Early Childhood Education and Teaching (13.1210)	California State University-Sacramento	486	479	483
	Grand Total	486	479	483

FINDINGS

This report focuses on the following four early childhood care and education occupations: Education and Childcare Administrators, Preschool and Daycare (11-9031); Preschool Teachers, Except Special Education (25-2011); Teaching Assistants, Except Postsecondary (25-9045); and Childcare Workers (39-9011).

Occupational Demand

- In 2022, the Greater Sacramento subregion held 22,497 jobs for the four early childhood care and education occupations. Analyzing the distribution of 2022 jobs across the four occupations reveals that teaching assistants, except postsecondary, accounted for 44% (9,858) of the total, with childcare workers comprising 35% (7,797).
- These four early childhood care and education occupations are projected to increase by 3% over the next five years, adding 712 new jobs to the subregion by 2027.
- Over the next five years, early childhood care and education occupations are projected to have 3,239 annual openings in the North (Greater Sacramento) subregion. Approximately 42% of annual openings in the subregion are for childcare workers, followed by 41% for teaching assistants, except postsecondary.
- Jobs for the occupations included in this report are projected to grow slightly faster in the Greater Sacramento subregion (3%) than in California (2%).

Wages

- Analysis of entry-level (25th percentile) wage data shows that the occupations included in this report earn \$14.03 to \$21.77 per hour. Only one of the four occupations – Education and Childcare Administrators, Preschool and Daycare – earns entry-level hourly wages (\$21.77) above the subregion's living wage of \$18.72 per hour.

Job Postings

- In the last 12 months, 4,708 job postings were found online for the four early childhood care and education occupations included in this report. Approximately 43% of job postings in the subregion were for preschool teachers, except for special education, followed by teaching assistants, except for postsecondary (40%).
- KinderCare Education is the employer with the highest number of job postings (301).

Education and Training Requirements

- The typical entry-level education for the occupations included in this report ranges from a high school diploma or equivalent for childcare workers to a bachelor's degree for education and childcare Administrators.
- Between 12% and 37% of incumbent workers in the studied occupations have educational attainment levels consistent with community college offerings (some college or associate degrees). Another 22% to 83% of incumbent workers hold a bachelor's degree or higher.
- Eighty-three percent of education and childcare administrators in California hold a bachelor's degree (25%) or a graduate degree (58%).

Postsecondary Supply

- Over the last three academic years, eight Greater Sacramento community colleges conferred an average of 669 degrees and certificates in Child Development/Early Care and Education (1305.00) programs.
- Between the 2019-20 and 2020-21 academic years, Sacramento State conferred an average of 483 bachelor's degrees through its early childhood education programs.

RECOMMENDATIONS

- A comparison of annual openings to average annual awards suggests an undersupply of early childhood care and education professionals in the Greater Sacramento subregion.
 - Eight community colleges in the Greater Sacramento subregion issued an average of 669 awards over the last three years (2019-21 to 2021-22).
 - There are 3,239 projected annual openings for the four early childhood care and education occupations included in this report.
- The North (Greater Sacramento) Center of Excellence recommends that community colleges develop new early childhood care and education programs and expand existing ones to meet local demand.
- Community colleges offering training related to preschool and daycare administrators should ensure their program is articulated to four-year degree transfer pathways. While entry-level preschool and daycare administrator jobs typically require a minimum of a bachelor's degree, a significant proportion of workers in the field hold a master's degree or higher.

New Program Recommendation		
Move forward with the new program	Proceed with caution	A new program is not recommended
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Program Modification	
Move forward with program modifications	Program modifications are not recommended
<input checked="" type="checkbox"/>	<input type="checkbox"/>

APPENDIX A. METHODOLOGY AND SOURCES

This report identified Occupations using the Center of Excellence TOP-to-CIP-to-SOC crosswalk and O*Net OnLine. This report's findings were determined using labor market data from the Bureau of Labor Statistics (BLS), U.S. Census Bureau data from Emsi, and jobs posting data from Burning Glass.

"The Chancellor's Office Curriculum Inventory System (COCI)." California Community Colleges Curriculum Inventory (COCI), 2023. <https://coci2.ccctechcenter.org/>.

Glasmeier, Amy K. "Living Wage Calculator." Living Wage Calculator, 2023. <https://livingwage.mit.edu/>.

Integrated Postsecondary Education Data System (IPEDS). National Center for Education Statistics. U.S. Department of Education. <https://nces.ed.gov/ipeds/>.

Labor Market Information Division. California Employment Development Department. <https://labormarketinfo.edd.ca.gov/>.

Lightcast (Formerly EMSI/Burning Glass) 2023.3; QCEW Employees, Non-QCEW Employees, and Self-Employed. <https://www.economicmodeling.com/>. *(Note: EMSI occupational employment data are based on final EMSI industry data and final EMSI staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors)).*

Management Information Systems (MIS) Data Mart. California Community Colleges Chancellor's Office. <https://datamart.cccco.edu/>.

O*NET OnLine. U.S. Department of Labor/Employment and Training Administration (DOL ETA). <https://www.onetonline.org/>.

Self-Sufficiency Standard Tool for California. The University of Washington. <http://www.selfsufficiencystandard.org/>

"Taxonomy of Programs." California Community Colleges Chancellor's Office. June 2012, 6th Edition. <https://www.cccco.edu/-/media/CCCCO-Website/About-Us/Divisions/Educational-Services-and-Support/Academic-Affairs/What-we-do/Curriculum-and-Instruction-Unit/Files/TOPmanual6200909corrected12513pdf.ashx>

"TOP-CIP-SOC Crosswalk." Centers of Excellence for Labor Market Research. June 2021 Edition. <http://coecc.net/>

APPENDIX B. GLOSSARY

Key Terms	Definition
Occupation	<p>Occupation refers to a category of jobs, careers, or professions that are similar regarding the work performed and the skills the workers possess. Workers who perform essentially the same tasks are in the same occupation, whether in the same industry. Some occupations are concentrated in a few industries, while others are found in many industries.</p> <p>Occupations differ from jobs in that jobs show the number of positions held in each occupation.</p>
Jobs	<p>A job is a specific instance of employment and includes any position where a worker provides labor for monetary compensation.</p> <p>Job numbers include employees (those who work for businesses) and proprietors (those who work for themselves). Full- and part-time jobs are included and counted equally (i.e., not adjusted to full-time equivalents). Data for jobs, or employment, are annual averages.</p>
Employment	<p>Employment refers to filled jobs, whether full- or part-time, temporary or permanent. The scope of "who" is counted as employed is noted in Appendix A. Methodology and Sources.</p>
Job Change	<p>Job change is the net increase or decrease of jobs over a given timeframe.</p>
Job Opening	<p>Job openings are the projected number of positions available for workers entering an occupation.</p> <p>Openings include growth and replacement job counts. Growth job counts are the positive change in the total number of workers employed. Replacement job counts are the estimates of new workers needed to replace workers permanently leaving the occupation.</p>
Percentile Wage (or wages)	<p>A percentile wage is the value of a wage at which a certain percentage of workers falls below. For example, a 25th percentile hourly wage of \$15.00 indicates that 25% of workers earn less than \$15.00, while 75% earn more. Percentile wages are specific to the geography shown in the report.</p> <p>The 25th-percentile and 75th-percentile hourly wages are used as a proxy for entry-level and experienced-level wages.</p>
Living Wage	<p>The living wage is the level of income a single, working adult with no children must earn to meet basic needs. The living wage is calculated using basic allowances for food, housing, transportation, healthcare, taxes, and other miscellaneous basic needs, and assumes full-time employment (40 hours per week, 52 weeks a year).</p> <p>Beginning in 2023-24, NFN COE adopted the MIT calculations for a living wage better aligned to the economic conditions following the pandemic. For additional information, please visit https://livingwage.mit.edu/.</p>

Key Terms	Definition
Educational Attainment	Educational attainment is the highest level of education achieved by workers in an occupation. The data include workers aged 25 years and older.
Typical Entry-level Education	<p>The education level most workers need to gain employment in an occupation. Categories range from "no formal educational credential" and "high school diploma or equivalent" to "doctoral or professional degree." The types most relevant to community training are "some college, no degree," "postsecondary nondegree award," and "associate degree."</p> <p>The typical entry-level education may differ from the actual educational levels attained by workers employed in an occupation.</p>
Typical Work Experience	The relevant prior experience a worker needs to gain employment in an occupation. Categories include "5 years or more", "less than five years," and "none."
Typical On-The-Job (OTJ) Training	The level of on-the-job training a worker needs to obtain for competency in the skills required for an occupation. Categories include "none," "short-term (1 month or less)," "moderate-term (more than one month but less than 12 months)," "long-term (more than 12 months)," "apprenticeship," and "internship/residency."
Awards	Awards are the number of certificates and degrees conferred for a specific course of study each year. Awards count "papers" and, as a result, may be greater than the number of students who complete a program.

Funding Acknowledgement: This report was made available with Strong Workforce Program funding from the North Far North Regional Consortium.

COVID-19 Statement: This report includes employment projection data produced by Lightcast (formerly EMSI). Employment projections are developed using models based on historical data, which in this set of projections covers the period through 2021. Most input data, therefore, precedes the pandemic. Employment projections are long-term projections intended to capture structural changes in the economy, not cyclical fluctuations. As such, projections data are not intended to capture the impacts of the recession that began in February 2020. Cyclical fluctuations, like recessions, impact projections when they become part of the historical data set.

Important Disclaimer: All representations included in this report have been produced from primary research and/or secondary review of publicly and/or privately available data and/or research reports. Efforts have been made to qualify and validate the accuracy of the data and the reported findings; however, neither the Centers of Excellence, COE host District, nor California Community Colleges Chancellor's Office are responsible for applications or decisions made by recipient community colleges, or their representatives based upon components or recommendations contained in this study.

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Centers of Excellence for Labor Market Research, Economic and
Workforce Development Program



CENTERS OF EXCELLENCE
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