

Program Endorsement Brief:

Early Childhood Care & Education in the Greater Sacramento region

North Far North Center of Excellence, September 2019

INTRODUCTION

This report provides an overview of the labor market demand and educational program supply for early childhood care and education related occupations in the Greater Sacramento region and the broader 22-county North Far North region.

SUMMARY OF KEY FINDINGS

- Early childhood care and education related occupations lost 7,000 jobs in the Greater Sacramento region – a decline of 22% - between 2008 and 2018.
- While demand for early childhood care and education related occupations has remained relatively stable since 2018, there are still large numbers of annual openings across the studied occupations.
- Median hourly wage typically fall between the living wage thresholds for one-adult and a one-adult, one-child household. The exception are childcare workers – this occupation tends to earn minimum wage.
- An increasing number of educational administrators and preschool teachers hold more education than typically required for entry-level work. Almost 60% of educational administrators hold a master's or a doctoral degree, while nearly one-third of preschool teachers hold a bachelor's degree.
- Child development/early care and education is the largest related program in the region, conferring an average of 600 awards per year.

The report contains the following sections:

- Occupational demand,
- Wages and job postings,
- Education and training,
- Regional program supply, and
- Findings and recommendations.

OCCUPATIONAL DEMAND

The following Standard Occupational Classification (SOC) codes related to the proposed program were included in the analysis:

11-9031.00 - Education Administrators, Preschool and Childcare Center/Program	
Description:	Plan, direct, or coordinate the academic and nonacademic activities of preschool and childcare centers or programs.
Sample job titles:	Administrator, Childcare Director, Early Head Start Director, Education Coordinator, Education Director, Education Site Manager, Preschool Director, Preschool Program Director, Principal, Site Coordinator
25-2011.00 - Preschool Teachers, Except Special Education	
Description:	Instruct preschool-aged children in activities designed to promote social, physical, and intellectual growth needed for primary school in preschool, day care center, or other child development facility. May be required to hold State certification.
Sample job titles:	Child Development Teacher, Early Childhood Teacher, Group Teacher, Infant Teacher, Montessori Preschool Teacher, Nursery Teacher, Pre-Kindergarten Teacher (Pre-K Teacher), Preschool Teacher, Teacher, Toddler Teacher
25-9041.00 - Teacher Assistants	
Description:	Perform duties that are instructional in nature or deliver direct services to students or parents. Serve in a position for which a teacher has ultimate responsibility for the design and implementation of educational programs and services.
Sample job titles:	Educational Assistant, Instructional Assistant, Para-educator, Paraprofessional, Special Education Aide, Special Education Paraprofessional, Special Education Teacher Assistant, Teacher Aide, Teacher Assistant, Teaching Assistant
39-9011.00 - Childcare Workers	
Description:	Attend to children at schools, businesses, private households, and childcare institutions. Perform a variety of tasks, such as dressing, feeding, bathing, and overseeing play.
Sample job titles:	Assistant Teacher, Caregiver, Child Care Worker, Child Caregiver, Childcare Provider, Childcare Worker, Daycare Teacher, Daycare Worker, Infant Teacher, Toddler Teacher

Exhibit 1 summarizes the job trends by SOC codes in the 7-county Greater Sacramento region, the 22-county North Far North region, and California.

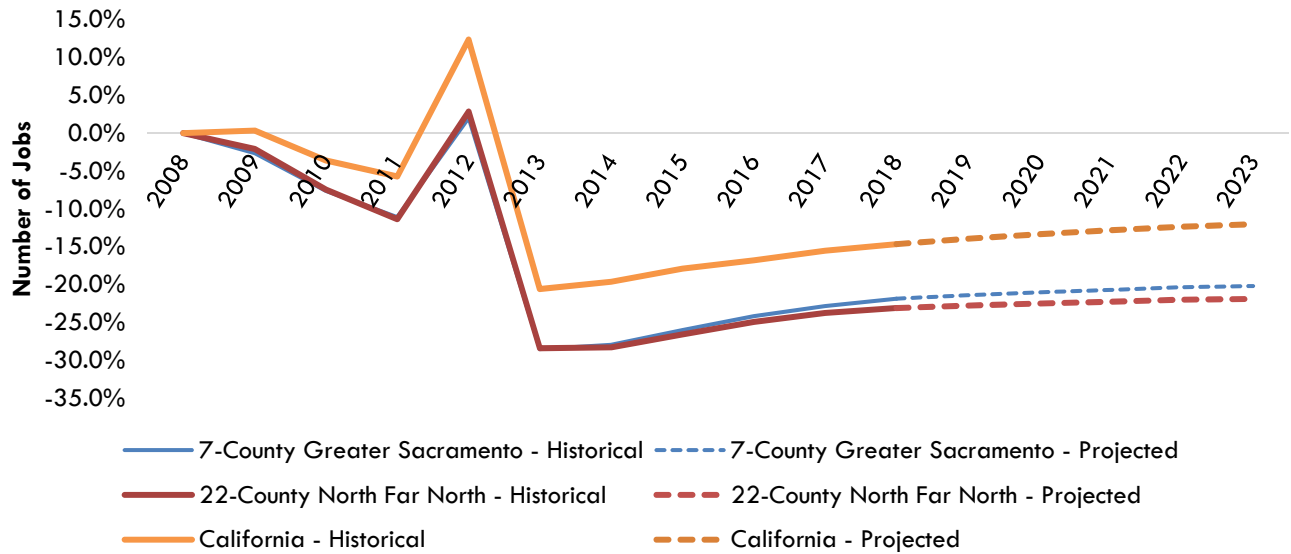
Exhibit 1. Employment and projected occupational demand¹

Occupation	SOC	2008 Jobs	2018 Jobs	2023 Jobs	2018-23 % Change	Annual Openings	Annual Replacements
Education Administrators, Preschool and Childcare Center/Program	11-9031	693	580	606	4.5%	86	47
Preschool Teachers, Except Special Education	25-2011	4,262	4,204	4,440	5.6%	582	389
Teacher Assistants	25-9041	11,602	12,211	13,057	6.9%	1,423	1,157
Childcare Workers	39-9011	15,905	8,376	7,809	-6.8%	1,776	1,561
GREATER SACRAMENTO	TOTALS	32,462	25,372	25,913	2.1%	3,867	3,152
Education Administrators, Preschool and Childcare Center/Program	11-9031	966	829	864	4.3%	126	67
Preschool Teachers, Except Special Education	25-2011	5,692	5,698	6,024	5.7%	814	530
Teacher Assistants	25-9041	16,625	17,183	18,196	5.9%	2,012	1,641
Childcare Workers	39-9011	22,378	11,412	10,583	-7.3%	2,491	2,160
NORTH FAR NORTH	TOTALS	45,660	35,122	35,667	1.6%	5,443	4,398
Education Administrators, Preschool and Childcare Center/Program	11-9031	9,583	9,233	9,761	5.7%	1,371	729
Preschool Teachers, Except Special Education	25-2011	56,073	61,131	65,336	6.9%	8,705	5,656
Teacher Assistants	25-9041	159,872	171,802	183,223	6.6%	19,953	16,376
Childcare Workers	39-9011	233,854	149,925	145,818	-2.7%	30,663	26,103
CALIFORNIA	TOTALS	459,382	392,091	404,138	3.1%	60,691	48,864

Exhibit 2 compares the rates of change of the total number of jobs between 2008 and 2018 in the Greater Sacramento region, the North Far North region, and California. It also compares occupational demand projections from 2018 through 2023 across the same areas. The rate of change is indexed to the base year 2008 total number of jobs.

¹ Emsi 2019.2; QCEW Employees, Non-QCEW Employees and Self-Employed. The 7-county Greater Sacramento region includes El Dorado, Placer, Nevada, Sacramento, Sutter, Yolo and Yuba. The 22-county North Far North region includes the aforementioned counties as well as Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Sierra, Siskiyou, Tehama and Trinity.

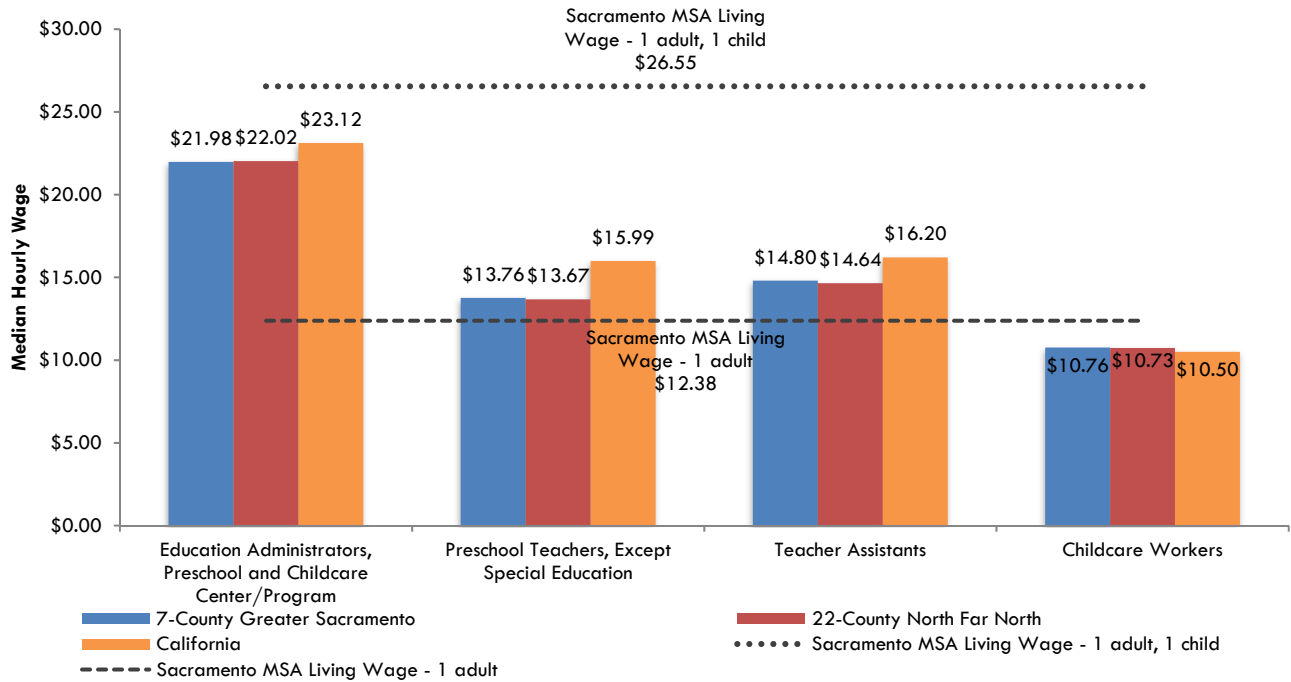
Exhibit 2. Rate of Change for Selected Occupations²



WAGES AND JOB POSTINGS

Exhibit 3 compares the median hourly wages of the selected occupations in the study regions to the Sacramento Metropolitan Statistical Area (MSA) living wage for a one-adult household and a one-adult, one-child household.³

Exhibit 3. Wages for selected occupations⁴



² Ibid.

³ Living Wage Calculator: Counties and Metropolitan Statistical Areas in California, <http://livingwage.mit.edu/>

⁴ Emsi 2019.2; QCEW Employees, Non-QCEW Employees and Self-Employed.

Burning Glass identified a pool of 4,379 job postings in the Greater Sacramento region for the selected occupations. This data represents job listings posted online within the last year, from September 1, 2018, through August 31, 2019.

Exhibit 4 compares the 12-month job posting trends of the selected occupations to the median number of job postings in the Greater Sacramento region.

Exhibit 4: Job postings trend for selected occupations⁵

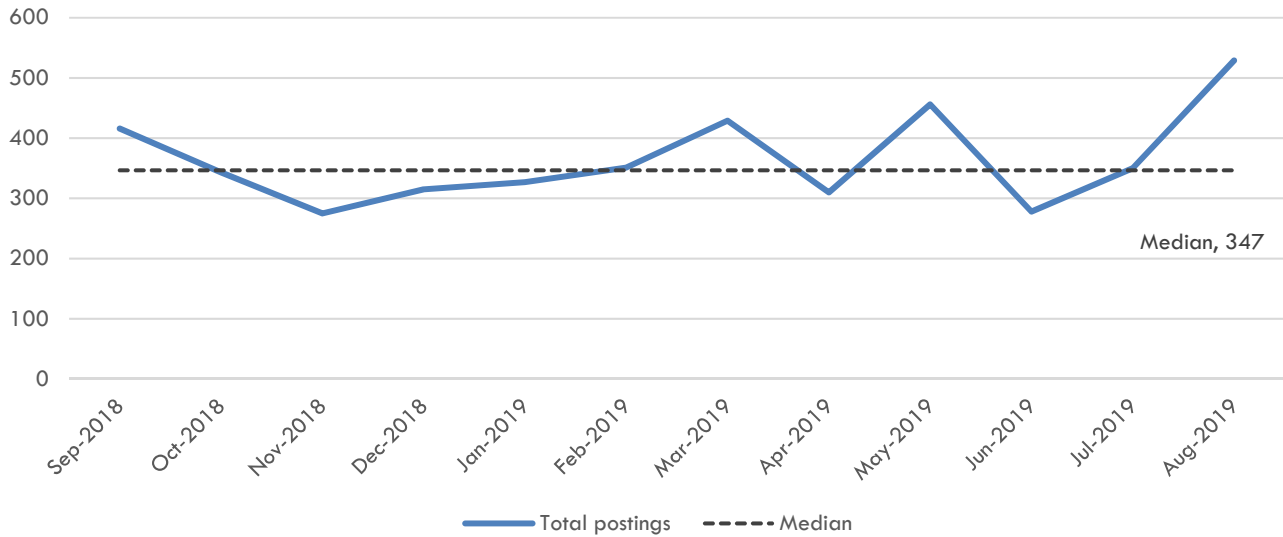
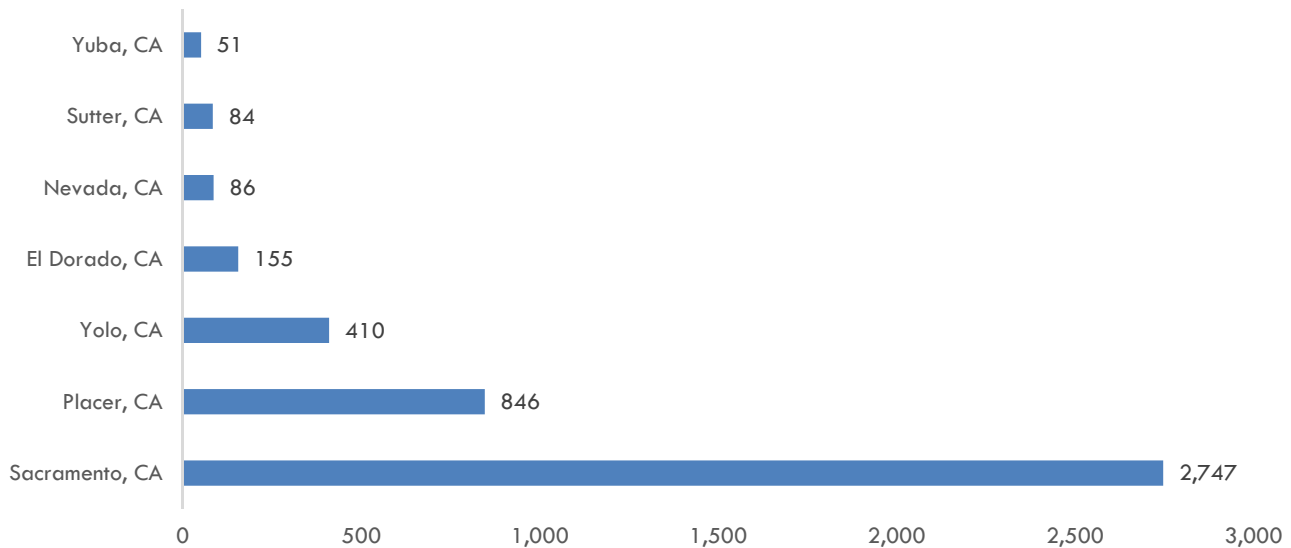


Exhibit 5 shows the number of job postings by county for the selected occupations.

Exhibit 5. Top job postings locations for selected occupations⁶



⁵ Burning Glass Technologies, "Labor Insight Real-Time Labor Market Information Tool," <http://www.burning-glass.com>, 2019.

⁶ Ibid.

Exhibit 6 lists the employers with the most job openings for the selected occupations within the study region. Nearly one-quarter of job postings were excluded because they did not include an employer name. As a result, the table below may not be representative of the full sample.

Exhibit 6: Top employers by number of job postings⁷

Employer	Greater Sacramento (n = 3,691)	
	Number of Postings	Percent of Postings
Cadence Education	246	7%
San Juan Unified School District	229	7%
Twin Rivers Unified School District	86	3%
Sacramento City Unified School District	73	2%
Rocklin Unified School District	68	2%
Sitter	67	2%
Sacramento City Unified	60	2%
In House Vacancy Internal Candidates Only	60	2%
Child Development Centers	51	2%
Los Rios Community College District	47	1%

⁷ Ibid.

Exhibit 7 shows the top job titles for the selected occupations in the Greater Sacramento region. All 4,379 job postings included job titles.

Exhibit 7. Top job titles by number of job postings⁸

11-9031.00 - Education Administrators, Preschool and Childcare Center/Program (n= 102)			25-2011.00 - Preschool Teachers, Except Special Education (n=1,551)		
Title	Job Postings	% Job Posting	Title	Job Postings	% Job Posting
Child Care Supervisor	31	30%	Preschool Teacher	772	50%
Assistant Pre-School Director	12	12%	Infant Teacher	108	7%
Preschool Teacher	7	7%	Teacher	80	5%
Treatment Program Coordinator	5	5%	Kindergarten Teacher	50	3%
Assistant School Director	3	3%	Early Childhood Teacher	47	3%
Early Childhood Teacher	3	3%	Assistant Teacher	34	2%
School Director	3	3%	Childcare Teacher	30	2%
Assistant Director	2	2%	School Program Teacher	30	2%
Child Care Director	2	2%	After School Teacher	22	1%
Daycare Assistance	2	2%	Child Development Assistant, School	17	1%
25-9041.00 - Teacher Assistants (n= 1,501)			39-9011.00 - Childcare Workers (n=1,225)		
Title	Job Postings	% Job Posting	Title	Job Postings	% Job Posting
Instructional Assistant	396	26%	Babysitter	691	56%
Para-educator	238	16%	Sitter	101	8%
Special Education Aide	197	13%	Child Care Provider	30	2%
Instructional Aide	140	9%	Child Care Assistant	29	2%
Teacher's Assistant	71	5%	Daycare Assistant	23	2%
Assistant Teacher	67	4%	Child Care Worker	21	2%
Teacher's Aide	30	2%	Aba With Children	20	2%
Associate School Program Teacher	25	2%	Program Aide	20	2%
Associate Teacher	15	1%	After School Coordinator	13	1%
Associate Head Teacher/Breaker	14	1%	After-School Care	13	1%

⁸ Ibid.

Exhibit 8 shows the skills most in-demand for the selected occupations in the Greater Sacramento region. All 4,379 job postings included required skills information.

Exhibit 8. Top skills by number of job postings⁹

11-9031.00 - Education Administrators, Preschool and Childcare Center/Program (n= 102)			25-2011.00 - Preschool Teachers, Except Special Education (n=1,551)		
Title	Job Postings	% Job Posting	Title	Job Postings	% Job Posting
Child Care	59	58%	Teaching	1,398	90%
Cardiopulmonary Resuscitation (CPR)	41	40%	Early Childhood Education	860	55%
Teaching	38	37%	Child Development	621	40%
Early Childhood Education	35	34%	Child Care	482	31%
Scheduling	30	29%	Lesson Planning	347	22%
Budgeting	22	22%	Cardiopulmonary Resuscitation (CPR)	341	22%
Child Development	17	17%	Pertussis	144	9%
Staff Management	17	17%	Influenza	142	9%
Community Relations	14	14%	Customer Service	118	8%
Occupational Health and Safety	10	10%	Caregiving	110	7%
25-9041.00 - Teacher Assistants (n= 1,501)			39-9011.00 - Childcare Workers (n=1,225)		
Title	Job Postings	% Job Posting	Title	Job Postings	% Job Posting
Teaching	729	49%	Babysitting	728	59%
Cardiopulmonary Resuscitation (CPR)	355	24%	Child Care	326	27%
Special Education	290	19%	Meal Preparation	164	13%
No Child Left Behind (NCLB)	212	14%	Cardiopulmonary Resuscitation (CPR)	161	13%
Scheduling	197	13%	Caregiving	120	10%
Child Development	162	11%	Teaching	80	7%
Clerical Duties	139	9%	Laundry	77	6%
Toileting	125	8%	Autism Diagnosis / Treatment / Care	41	3%
Lifting Ability	116	8%	Cleaning	39	3%
Child Care	111	7%	Scheduling	37	3%

⁹ Ibid.

EDUCATION AND TRAINING

Exhibit 9 shows the average level of educational attainment for workers 25 years and older by occupation across the U.S.

Exhibit 9. Typical educational attainment for selected occupations, nationally¹⁰

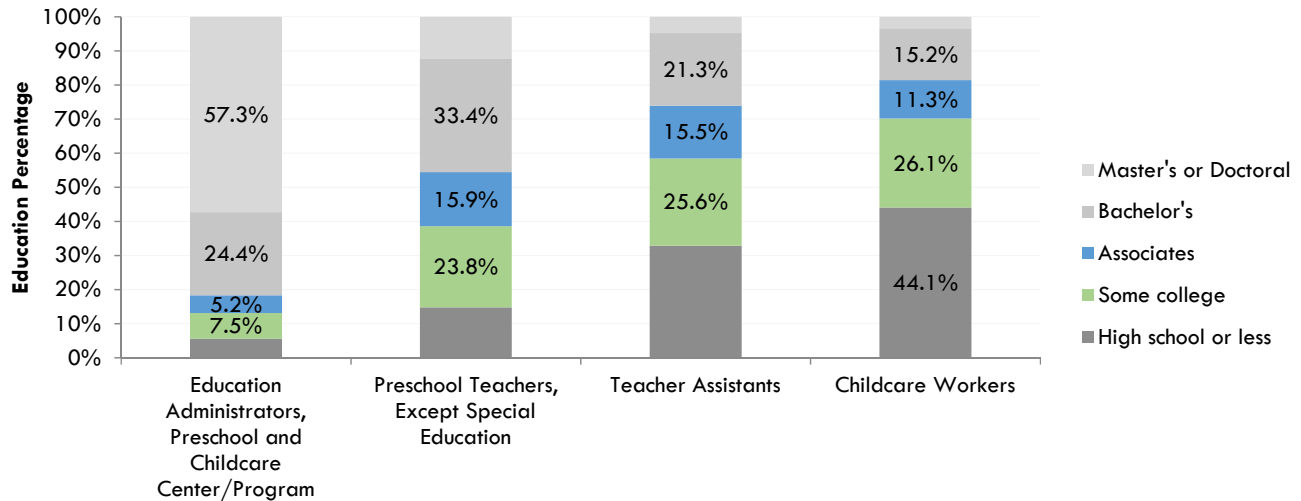


Exhibit 10 shows the typical entry-level education requirements, on-the-job training, and work experience requirements for the selected occupations in the Greater Sacramento region.

Exhibit 10. Typical education, training, and work experience for selected occupations¹¹

Occupations	SOC	Typical Entry-Level Education	Typical On-The-Job Training	Work Experience Required
Education Administrators, Preschool and Childcare Center/Program	11-9031	Bachelor's degree	Less than 5 years	None
Preschool Teachers, Except Special Education	25-2011	Associate's degree	None	None
Teacher Assistants	25-9041	Some college, no degree	None	None
Childcare Workers	39-9011	High school diploma or equivalent	None	Short-term on-the-job training

PROGRAM SUPPLY

There are several Taxonomy of Program (TOP) codes related to training for early childhood care and education related occupations: 0802.00 – Educational Aide (Teacher's Assistant), 1305.00 – Child Development/Early Care and Education, 1305.80 – Child Development Administration and Management, and 1305.90 – Infant and Toddlers. The corresponding Classification of Instructional Programs (CIP) code for these programs are 13.1501 – Teacher Assistant/Aide, 19.0709 – Child Care Provider/Assistant, 19.0709 – Child Care Provider/Assistant, and 19.0708 – Child Care and Support Services Management, respectively.

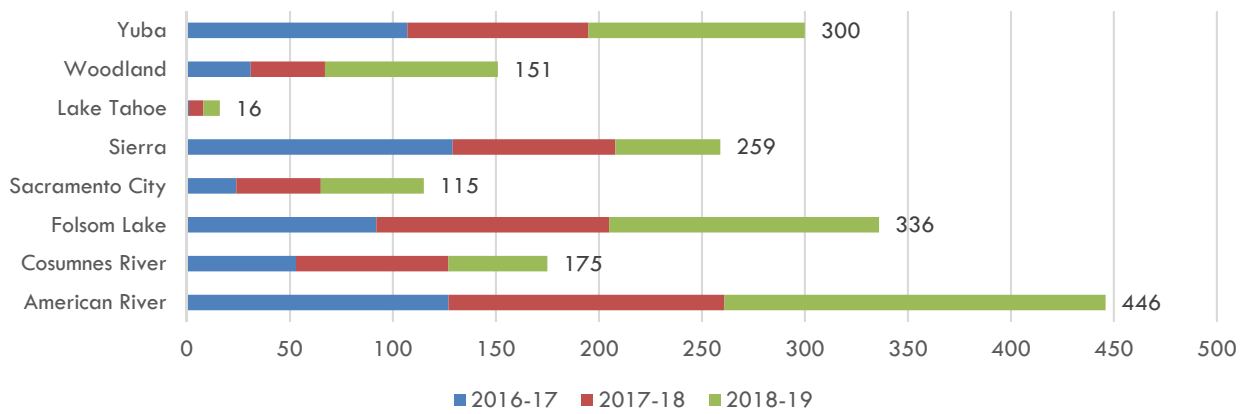
Exhibit 11 compares the average total number of awards (certificates and degrees) conferred by colleges and program in the selected TOP codes in the Greater Sacramento region over the last three academic years. No other post-secondary institutions beyond the community colleges offered training in the related CIP codes.

¹⁰ Bureau of Labor Statistics. Educational Attainment for Workers 25 Years and Older by Detailed Occupation, 2016-2017, <https://www.bls.gov/emp/tables/educational-attainment.htm>.

¹¹ Emsi 2019.2; QCEW Employees, Non-QCEW Employees and Self-Employed.

Exhibit 11. Total awards conferred by Greater Sacramento post-secondary institutions, 2016-19¹²

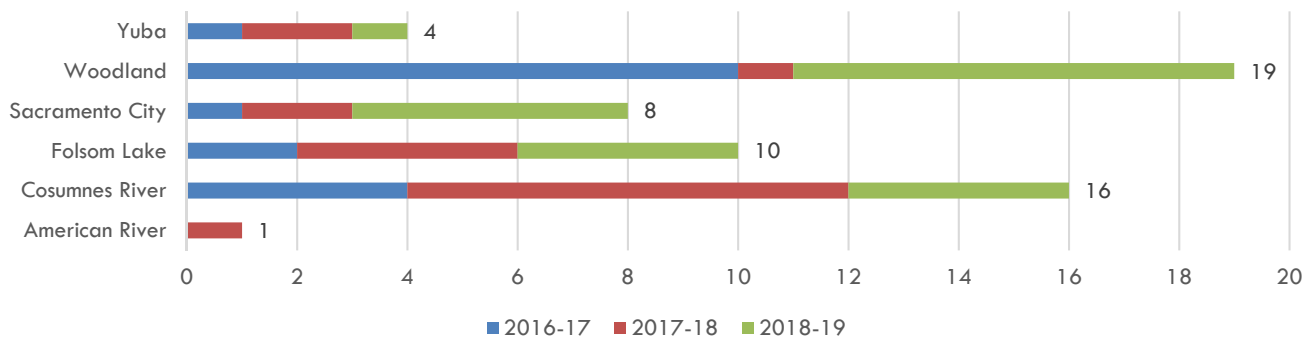
Child Development/Early Care and Education - 1305.00



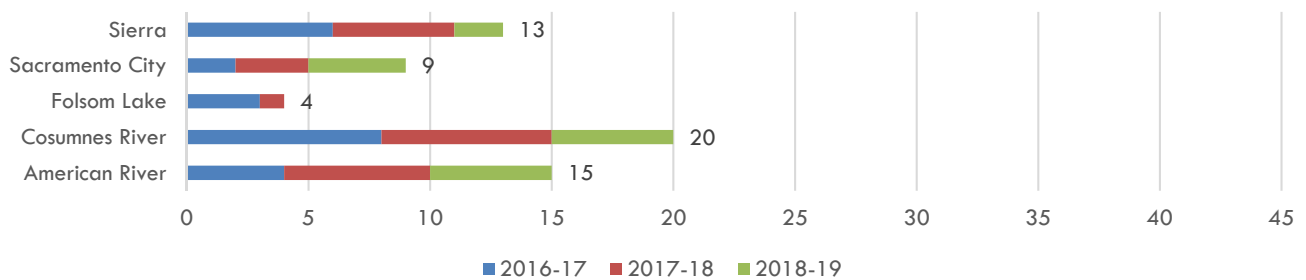
Educational Aide (T.A.) - 0802.00



Infants and Toddlers - 1305.90



Child Development Administration and Management - 1305.80



¹² COE Supply Tables, California Community Colleges Chancellor's Office DataMart, and Integrated Postsecondary Education Data System (IPEDS).

Exhibit 12 displays program awards by college, award level, and year for the selected education programs over the last three academic years.

Exhibit 12. Program awards conferred by Greater Sacramento community colleges, 2015-2018¹³

Child Development/Early Care and Education – 1305.00												
	Certificate				Associate				Associate for Transfer			
	2016-17	2017-18	2018-19	3-Yr Avg	2016-17	2017-18	2018-19	3-Yr Avg	2016-17	2017-18	2018-19	3-Yr Avg
American River	92	95	139	109	17	18	28	21	18	21	18	19
Cosumnes River	36	48	30	38	13	19	6	13	4	7	12	8
Folsom Lake	82	101	123	102	8	6	5	6	2	6	3	4
Sacramento City	1	7	3	4	18	22	24	21	5	12	23	13
Sierra	72	41	23	45	33	28	17	26	24	10	11	15
Lake Tahoe	1	1	3	2	0	3	3	2	0	3	2	2
Woodland	2	15	48	22	24	19	30	24	5	2	6	4
Yuba	73	60	82	72	30	20	18	23	4	8	5	6
Totals	359	368	451	393	143	135	131	136	62	69	80	70

Educational Aide (Teacher Assistant) – 0802.00				
	Certificate			
	2016-17	2017-18	2018-19	3-Yr Avg
Sacramento City	1	0	0	0
Totals	1	0	0	0

Infants and Toddlers – 1305.90				
	Certificate			
	2016-17	2017-18	2018-19	3-Yr Avg
American River	0	1	0	0
Cosumnes River	4	8	4	5
Folsom Lake	2	4	4	3
Sacramento City	1	2	5	3
Woodland	10	1	8	6
Yuba	1	2	1	1
Totals	18	18	22	19

Child Development Administration and Management – 1305.80								
	Certificate				Associate			
	2016-17	2017-18	2018-19	3-Yr Avg	2016-17	2017-18	2018-19	3-Yr Avg
American River	4	6	5	5	0	0	0	0
Cosumnes River	0	0	0	0	8	7	5	7
Folsom Lake	2	1	0	1	1	0	0	0
Sacramento City	--	--	--	--	2	3	4	3
Sierra	--	--	--	--	6	5	2	4
Totals	6	7	5	6	17	15	11	14

¹³ Ibid.

FINDINGS

- Between 2008 and 2018, early childhood care and education related occupations lost 7,000 jobs in the Greater Sacramento region – a decline of 22%. Childcare workers were hit the hardest – this occupation lost nearly half of its jobs in ten years.
- Since 2018, demand for early childhood care and education related occupations has remained relatively stable. Some occupations – education administrators and childcare workers – have yet to return to their pre-recession job counts. Educational administrators for preschools and childcare centers projected to grow by 4.5% (26 jobs) by 2023, and are projected to have 86 annual openings. Childcare workers are projected to lose another 570 jobs – declining by nearly 7% over the next five years. Despite the loss in jobs, childcare workers will have the largest number of annual openings across all four occupations – nearly 1,800 projected openings per year.
- Preschool teachers and teacher assistants are projected to grow by 5.6% and 6.9%, respectively, over the next five years. There will be an estimated 580 annual openings for preschool teachers and 1,400 annual openings for teacher assistants.
- Overall, median hourly wages for most early childhood care and education related occupations are above the regional living wage for a one-adult household, but below the threshold for a one-adult, one-child household. Educational administrators can expect to earn the most of the group – nearly \$22 per hour in the Greater Sacramento region.
- Only childcare workers fall below the single adult living wage threshold. Childcare workers in the seven-county Greater Sacramento region make around \$11 per hour, or minimum wage.
- The educational attainment for incumbent workers and the typical entry-level education required for entry-level work are sometimes a mismatch among certain early childhood care and education related occupations. For instance, while entry-level work for education administrators of preschool and childcare programs requires a bachelor's degree, almost 60% of incumbent workers in the occupation hold a master's or doctoral degree (less than a quarter hold a bachelor's degree only). The typical entry-level education for a preschool teacher is an associate's degree, yet 33% of incumbent workers hold a bachelor's degree (vs. 16% with an associate's degree only).
- Around a quarter of incumbent teacher assistants and childcare workers have attended some college, while another 10-15% have earned an associate's degree. The required entry-level education tends to match what incumbent workers hold – some college or short on-the-job training.
- Burning glass identified 4,379 job postings in the seven-county Greater Sacramento region, posted online between September 1, 2018 and August 31, 2019. Thirty-five percent of the job postings were for preschool teachers, 34% for teacher assistants, 28% for childcare workers, and 2% for education administrators of preschools and childcare centers.
- COE examined four TOP codes related to early childhood care and education: 0802.00 – Educational Aide (Teacher's Assistant), 1305.00 – Child Development/Early Care and Education, 1305.80 – Child Development Administration and Management, and 1305.90 – Infant and Toddlers. Please note that these are not the only TOP code programs that train towards the studied occupations; there are at least two other programs that link to the studies occupations¹⁴.
- Eight community colleges conferred a total of 1,798 certificates and degrees between 2016 and 2019.
- Community college conferred an average of 638 awards per year over the last three years, including 418 certificates and 70 associates for transfer.
- The largest program (by number of awards) is 1305.00 - child development/early care and education. This program awarded an annual average of 393 certificates, 136 associate degrees, and 70 associates

¹⁴The other programs, 1305.40 – Preschool Age Child and 1305.50 – The School Age Child, conferred an average of 12 additional awards per year (2016-19) in the Greater Sacramento region.

for transfer over the last three years. This program prepares students to work as preschool teachers and childcare workers.

RECOMMENDATIONS

- Based on a three-year average of annual awards in early childhood care and education in the Greater Sacramento region (638 certificates and degrees), and projected yearly openings for related occupations (3,867 openings), the region appears to have some demand for programs related to the occupation.
- Certain programs – such as those for education program administrators at the preschool and childcare level – may benefit from a transfer focus.

COE Recommendation		
Move forward with program	Program is not recommended	Additional information needed
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

METHODOLOGY

Occupations in this report were identified using O*Net. Findings in this report 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.

APPENDIX A: DATA SOURCES

Sources used for data analysis purposes in this report include:

- U.S. Department of Labor/Employment and Training Administration (DOLETA) O*NET Online
- Burning Glass, Labor Insight/Jobs
- Economic Modeling Specialists, International (EMSI)
- California Employment Development Department, Labor Market Information Division (EDD, LMID)
- Bureau of Labor Statistics, Occupational Employment Statistics (OES)
- California Community Colleges Chancellor's Office, Cal-PASS Plus LaunchBoard
- Living Insight Center for Community Economic Development, Self-Sufficiency Standard Tool for California
- California Community Colleges Chancellor's Office Management Information Systems (MIS Data Mart)
- U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS)

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