

# 2024 Profiles of California Early Care and Education Programs

## Enrollment and Staffing Trends

Challenges with early care and education (ECE) enrollment and staffing are not new, but the COVID-19 pandemic added fuel to the fire. Even in an economic upswing, **child care is expensive** and hard to find. Because ECE programs cannot afford robust wages, there is a high level of worker turnover. ECE businesses are also particularly **vulnerable to economic downturns**. During the upheaval of the COVID-19 pandemic, **federal relief dollars** were essential in staving off mass closures.

**In these profiles, we provide data on the status of ECE programs in 2024.** While they largely avoided closure, programs lost substantial numbers of staff, and enrollment dropped sharply. The return to already precarious pre-pandemic levels has been a struggle. Moreover, programs are fighting to recover just as California is implementing a major innovation: universal **transitional kindergarten** (TK) for four-year-olds. While it is unclear how much TK is driving the current state of affairs, it is undeniable that ECE programs are struggling: in child care centers, enrollment of *all* age groups lags behind pre-pandemic levels. Large FCC providers—those serving up to 14 children—have likewise seen a decline in preschool-age enrollment.

**While TK expansion ostensibly represents an addition to California’s ECE options, in practice, it is reconfiguring California’s market for early care and education.** As we demonstrate, most ECE programs are dependent on serving TK-age children but will likely need to pivot to serving children age three and younger to stay afloat. So far, California has **invested** in launching TK without parallel investments in the rest of the mixed-delivery ECE system. Individual ECE programs are left to figure out a stable mix of age groups for enrollment (including by moving away from TK-age children). As a consequence, California’s goal of achieving **mixed-delivery universal prekindergarten** is largely hollow: only TK is universal; all other forms of early care and education remain underfunded and unstable.

**Going into 2025, California faces a state budget deficit but may still have the opportunity to shore up its shaky ECE investments.** Subsidy reimbursement rate reform is already in motion: the legislature has promised to pay subsidies that better align with the cost of providing care. Implementing a new funding model could help bring programs with public funding closer to stability, yet many programs don’t receive public funding and will not benefit from rate reform. Across the state, ECE programs need support to pivot towards serving younger children. Such assistance could include empowering counties with ongoing resources for coordination, technical assistance, and worker retraining.

**About the data:** To report on the status of ECE programs, we draw on survey data collected from 2020 to 2024 through the [California Early Care and Education Workforce Study](#). We assembled a representative set of child care centers and FCC educators in 2020, many of whom returned to participate in follow-on surveys in 2023 and 2024. Data from each year are weighted to account for shifts in response rate by region and program type.

#### Highlights from our profile on **child care centers**:

- Enrollment fell in all age groups during the pandemic and had only partially rebounded by Spring 2024. Head Start and Title 5 sites experienced the heaviest impact: on average, sites served 20 fewer children age four to five in 2024 compared to pre-pandemic.
- Most directors see increasing enrollment for three-year-olds as the best strategy as four-year-olds enroll in TK. Many center teachers would be open to teaching three-year-olds, but very few want to teach infants and toddlers.
- Directors and teaching staff agree that economic concerns like educator pay and cost of living are the top drivers of turnover. We estimate 40-percent turnover of lead teachers and 50-percent turnover of assistants in the 2023-2024 school year.

#### Highlights from our profile on **family child care programs**:

- FCC educators have small group sizes that have not changed much on average; however, we do find evidence of a shift among large FCC educators: average enrollment for four- and five-year-olds decreased from four to three children. A similar decline occurred in enrollment of three-year-olds.
- Some FCC providers feel the loss of four-year-old enrollment deeply, both in their revenue and in their interactions with younger children.
- Large FCC providers frequently work with an assistant, but the share of providers with a paid assistant fell from 58 percent in 2020 to 43 percent in 2024. About one in five FCC educators had a vacant assistant position at the time of our survey.

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**Editor:** Deborah Mecham

# Child Care Center Profile

During the COVID-19 pandemic, child care centers hollowed out: enrollment of children across the birth-to-five age range dropped significantly, though many centers survived thanks to [federal relief funding](#). But in California, just as programs began to recover, transitional kindergarten started expanding to a universal early care and education (ECE) offering for four-year-olds.

In this snapshot, we provide data on the status of child care centers, accompanied by representative comments that center directors shared in open-ended survey questions. Directors and teaching staff frequently expressed a perception that TK expansion is impacting the viability of their program, yet TK expansion overlaps COVID-19 recovery. Consequently, it is not feasible for us to determine the extent of the impact of either factor on understaffing or underenrollment. Nonetheless, child care centers are indeed struggling, as our snapshot shows.

This snapshot shares data from California’s child care centers gathered during the [California Early Care and Education Workforce Study](#) in multiple surveys from 2020 to 2024. We first contacted center directors and their teaching staff in late 2020, developing a representative group of sites. In our follow-on surveys in 2023 and 2024, we only reached a subset of the group from 2020. As a result, readers should note that data from these later surveys reflect a smaller sample size and are not necessarily representative of the full population of sites. To strengthen our analysis, we have applied statistical weights to director-level data to align our sample with the population of sites in each year. Teaching staff data are unweighted and should be interpreted with caution.<sup>1</sup>

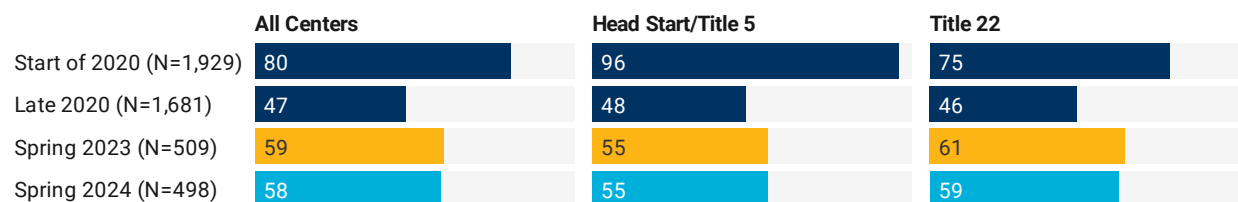
The snapshot breaks out most findings by center type. **Title 22** centers follow the fundamental rules of health and safety associated with licensure. A smaller portion of centers participate in stricter standards governed by **Head Start and/or Title 5**, in which teachers work with a smaller group size and must hold more units in ECE coursework.<sup>2</sup>

## Child care center enrollment is down since 2020.

**Enrollment dropped significantly during the COVID-19 pandemic.** As of 2023, there was a partial recovery, but enrollment did not improve in 2024.

### Average Enrollment, By Center Type

California Child Care Centers, 2020-2024

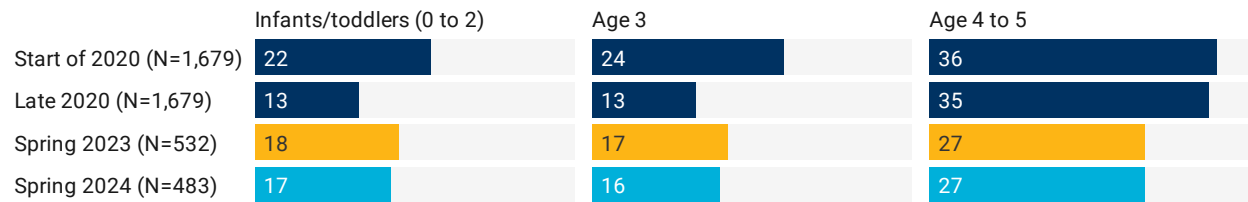


Source: Center for the Study of Child Care Employment, University of California, Berkeley

**Enrollment recovery has been uneven across the birth-to-five age span.** Enrollment dropped in all age groups during the pandemic and has recovered most among infants and toddlers and least for four- and five-year-olds.

## Average Enrollment, By Age Group

California Child Care Centers, 2020-2024



Source: Center for the Study of Child Care Employment, University of California, Berkeley

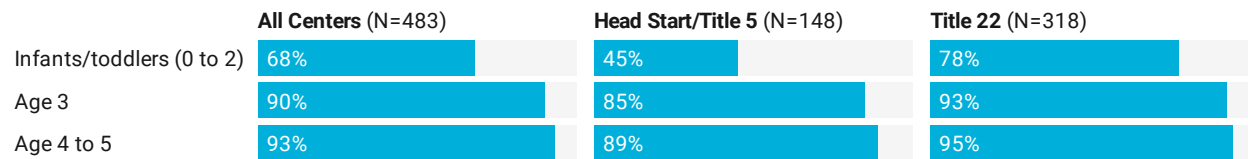
Note: Some centers do not serve infants and toddlers, which requires a separate license. As a consequence, the sample size for infants and toddlers is lower (N=354 in Spring 2024).

**The share of centers serving each age group of children has remained consistent since 2020.**

Currently, most sites serve children age three through five.

## Age Groups Served, By Center Type

California Child Care Centers, 2024

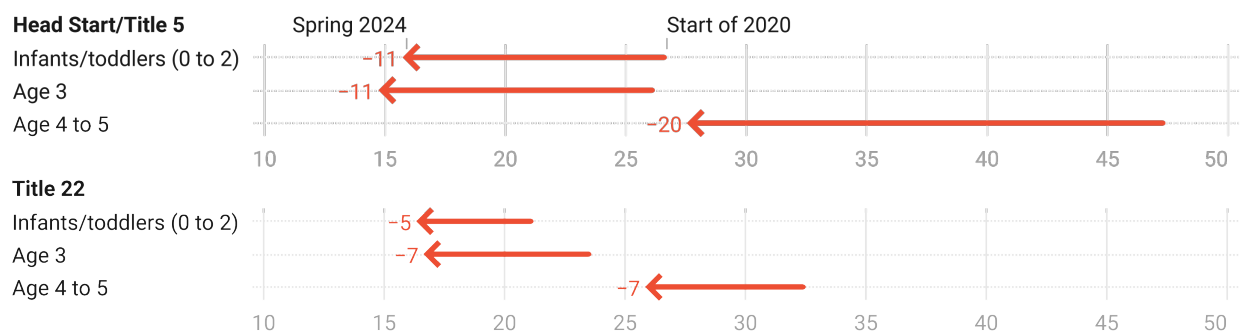


Source: Center for the Study of Child Care Employment, University of California, Berkeley

**The greatest decline in enrollment is among preschool-age children in Head Start/Title 5 sites, including three-year-olds.** In particular, average site enrollment for four- and five-year-olds was still down by 20 spaces in 2024, compared to before the pandemic.

## Change in Enrollment, By Age and Center Type

California Child Care Centers, 2020-2024



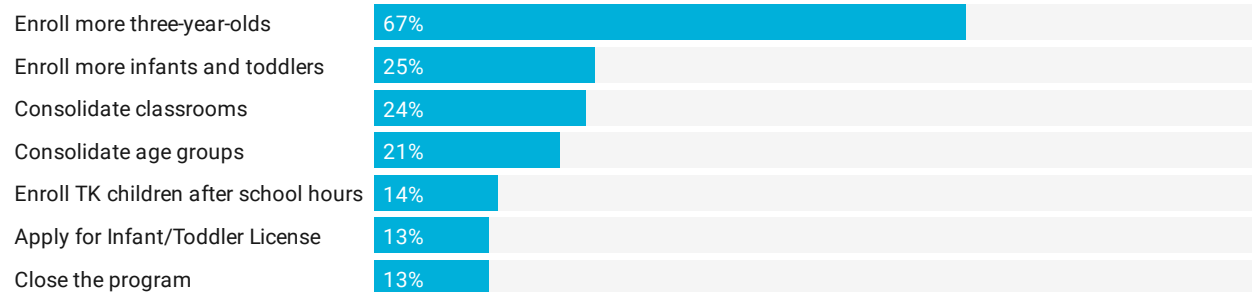
Source: Center for the Study of Child Care Employment, University of California, Berkeley

## We asked directors what centers would do if enrollment among four-year-olds continued to drop.

According to the directors and site supervisors, enrolling more three-year-olds was the best option (sometimes in combination with another strategy).

## Strategies for Addressing Loss of TK-Age Enrollment

California Child Care Center Directors (N=400), 2024



Source: Center for the Study of Child Care Employment, University of California, Berkeley

### Directors lamented the changes to enrollment and described their worries about the future of their programs.

*"Sometimes we just feel as though the rug has been pulled out from under us. After the pandemic, we were never able to reopen the third classroom. Soon we won't start the year with any four-year-olds. We've had a rich pre-K curriculum for 30 years. Our teachers have had to adapt the curriculum for the younger children."*

— Center Director, Sonoma County

*"Montessori depends on a balanced mixed-age classroom of three- to five-year-olds to help make the most of the curriculum. If more families choose TK, it will be a detriment to our program and diminish the quality of instruction."*

— Center Director, Monterey County

*"We offer a four-year-old program, but it does not seem valued. Once TK is settled, then what will happen? Will the three-year-olds be taken next?"*

— Center Director, San Bernardino County

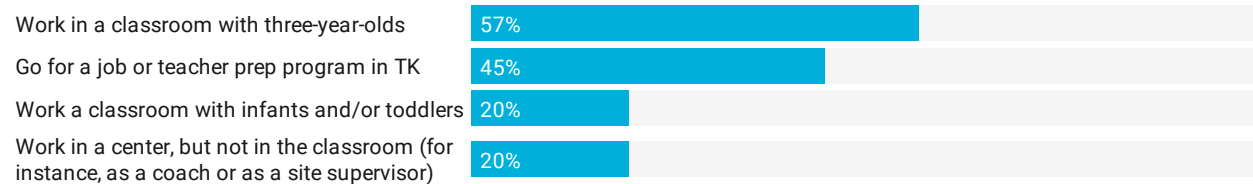
**Our survey also asked early educators what they would do if they could no longer have their current job working with four-year-olds.**

- Most often, they expressed interest in moving to a classroom with three-year-olds (57 percent), but many were interested in working in TK (45 percent).
- Few respondents wanted to work in a classroom with infants and toddlers instead (20 percent).

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## Preschool Teacher Job Preferences as Children Move to TK

California Child Care Center Teaching Staff, 2024



Source: Center for the Study of Child Care Employment, University of California, Berkeley

Note: Chart includes teaching staff currently working with four- or five-year-olds, some of whom already teach three-year-olds in a mixed-age classroom (N=287).

We recently published a data snapshot on early educators' experience with and interest in teaching infants and toddlers, using data from the same 2024 survey. We found that most early educators have experience teaching children from birth to age three. Additionally, educators with an associate or bachelor's degree most often have completed some coursework covering this age group. However, while early educators may have some preparation for teaching children birth to three, many of them would be interested in following four-year-olds to transitional kindergarten. Read more [here](#).

## Centers have stubbornly high staff turnover and vacancy rates.

**In early 2024, the majority of directors (75 percent) reported they had seen at least one position turn over since the previous year.**

- Sites with turnover among lead teachers reported an average of 2.9 positions turning over, resulting in a 24-percent turnover rate overall.
- Sites with assistant teachers reported an average of 2.6 positions turning over in a year, resulting in a 32-percent turnover rate overall.
- While Head Start/Title 5 sites reported a greater *number* of departed assistant teachers, they also employ more of them on average, so their turnover rate was somewhat lower (23 percent, compared to 36 percent at other sites).

## Staff Turnover Between 2023 and 2024, By Center Type

California Child Care Centers, 2023-2024

	All Centers	Head Start/Title 5	Title 22
<b>Turnover average by site</b>	<b>N=455</b>	<b>N=141</b>	<b>N=304</b>
Any turnover at site	75%	71%	77%
Teachers who left	2.9	3.0	2.9
Assistants who left	2.6	3.0	2.3
<b>Overall turnover rate</b>	<b>N=297</b>	<b>N=83</b>	<b>N=214</b>
Lead teachers	24%	20%	26%
Assistant teachers	32%	23%	36%

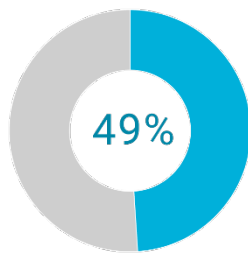
Source: Center for the Study of Child Care Employment, University of California, Berkeley

Note: We estimate the overall turnover rate by dividing the number of individuals who left by current staffing. The analytical sample is lower for overall turnover rate because some directors did not report current staffing levels broken out by teacher type.

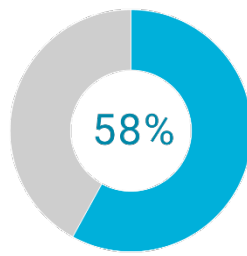
**Around one half of center directors reported at least one vacancy at the time of the survey.** Head Start/Title 5 sites were more likely to be impacted (58 percent, compared to 45 percent of other sites).

## Sites With at Least One Vacancy, By Center Type

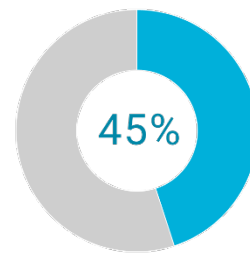
California Child Care Centers, 2024



**All Centers (N=458)**



**Head Start/Title 5 (N=143)**



**Title 22 (N=305)**

Source: Center for the Study of Child Care Employment, University of California, Berkeley

*“I worry a lot that community-based child care centers will become staffed by young, inexperienced teachers or under-educated teachers as more and more ECE professionals move to the public TK system.”*

— Center Director, Los Angeles County

*“Not all teachers want to work with the age group we are enrolling.”*

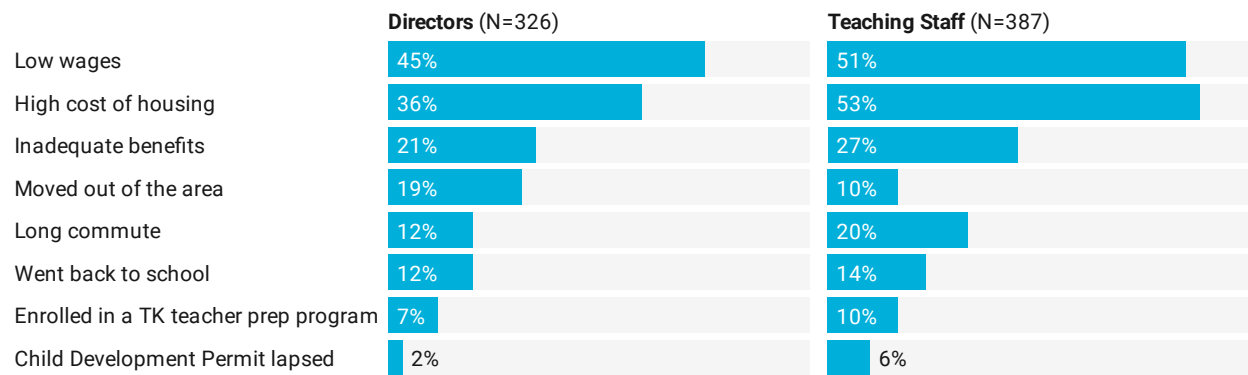
— Center Director, Santa Clara County

We asked center-based educators which issues most often led to turnover at their site. The chart below shows the share of respondents who agreed each factor was “often an issue.”

- Issues related to educator pay and the cost of living were the most prevalent.
- Teaching staff more often reported their peers left due to the high cost of housing (53 percent), whereas fewer directors felt this was “very often” a reason (36 percent).
- Few respondents felt that TK teacher prep programs were often an issue: only 7 percent of directors and 10 percent of teaching staff.

## Common Perceptions of Turnover Drivers, By Job Role

California Child Care Centers, 2024



Source: Center for the Study of Child Care Employment, University of California, Berkeley

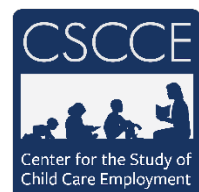


Additionally, about **one fifth of directors** reported that teaching staff commonly leave within one year of being hired.

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<sup>1</sup> The sample in 2020 included approximately 2,000 center directors, compared with 550 in 2023 and 450 in 2024. Our analytical weights adjust the sample by California region and license type. For a map of the five regions grouping contiguous counties, refer to **Figure 2.1** in our [2022 report](#) on early educator compensation. For license type, we weight the data based on whether the site is licensed to serve infants and toddlers or not. Other factors such as program auspices (e.g., for-profit or nonprofit status) are not addressed by weights.

<sup>2</sup> For a comparison of the two statutes, refer to this [resource](#) from the Community Child Care Council of Santa Clara County.





# Family Child Care Program Profile

Educators who run a family child care (FCC) program typically did not have the luxury of offering virtual care during the COVID-19 pandemic. As a consequence, some FCC programs closed and did not reopen—and those providers who struggled through the crisis faced substantial financial turmoil. As the state of emergency passed, surviving FCC educators faced a new challenge in the form of transitional kindergarten (TK) expansion. In particular, educators with a large license (serving up to 14 children) were more often working with a group of preschool-age children, yet even mixed-age groups are experiencing upheaval from the departure of four-year-olds.

In this snapshot, we provide data on the status of FCC providers, accompanied by some representative comments that these early educators shared in open-ended survey questions. FCC providers often expressed concerns that growth of TK is impacting their program’s viability. Because TK expansion overlaps COVID-19 recovery, it is not feasible for us to determine which factor had a greater impact on FCC providers in 2024. However, our snapshot shows that the FCC educators do feel the ground shifting beneath their feet.

This snapshot shares data from California’s family child care providers gathered during the [California Early Care and Education Workforce Study](#) in multiple surveys from 2020 to 2024. We first contacted FCC providers in late 2020, developing a representative group of sites. In our follow-on surveys in 2023 and 2024, we only reached a subset of the group from 2020. As a result, readers should note that data from these later surveys reflect a smaller sample size and are not necessarily representative of the full population of sites. To strengthen our analysis, we weight our data to align the sample with the population of sites in each year.<sup>1</sup>

The snapshot reports findings by FCC license type: **small** and **large**, a distinction that corresponds to the maximum group size (up to eight children for a small license and up to fourteen for a large license). Most often, small FCC educators operate their child care program on their own, while large FCC educators more often work with at least one assistant.

*“With fewer preschool inquiries, we have a harder time maintaining enrollment. Not having the children stay as long impacts their behavior and relationships with staff.”*

— FCC Educator, San Bernardino County

*“I have always gotten the children ‘preschool and kindergarten ready.’ Now children are leaving sooner to attend TK because it’s free.”*

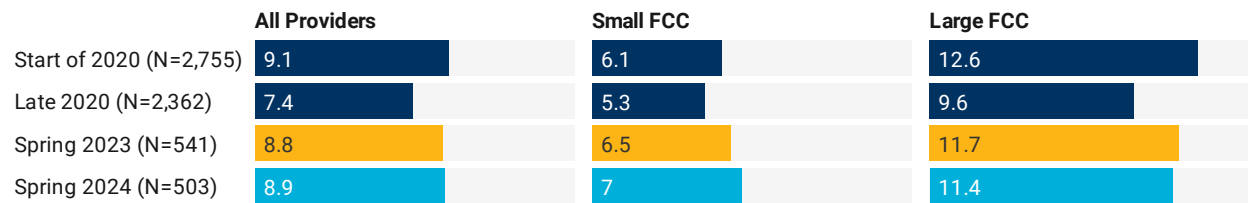
— FCC Educator, Fresno County

# FCC enrollment averages are relatively even over time, but averages only tell part of the story.

Family child care educators experienced a dip in enrollment at the height of the COVID-19 pandemic. Large FCC providers were particularly likely to see lower enrollment.

## Average Family Child Care Enrollment, By License Type

California Family Child Care Providers, 2020-2024

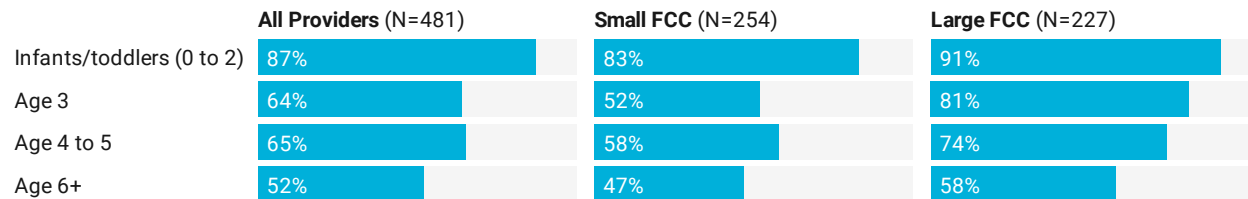


Source: Center for the Study of Child Care Employment, University of California, Berkeley

The share of providers serving each age group of children has not shifted very much over time. Large FCC providers are more likely to serve preschool-age children.

## Age Groups Served, By License Type

California Family Child Care Providers, 2024



Source: Center for the Study of Child Care Employment, University of California, Berkeley

### FCC educators have small group sizes, and on average, enrollment by age has not changed much since 2020.

However, we do find evidence of a shift among large FCC educators: average enrollment of four- and five-year-olds has decreased from four children to three. A similar average decline occurred for three-year-olds. Enrollment averages mask larger shifts in individual FCC programs.

To provide aftercare for TK- and school-age children, some FCC providers are stretching themselves to offer transportation.

*“We now have the responsibility of transportation to the TK program because parents work nontraditional hours.... I have to hire someone to cover me since leaving my assistant with the children would put me out of ratio.”*

— FCC Educator, San Diego County

**Some FCC educators feel the loss of four-year-old enrollment deeply, both in their revenue and in their interactions with younger children.** Also, because FCC educators maintain a small group size, each child’s departure makes a big impact on the program.

*“The four-year-olds were the ‘big kids’ in my program, capable of modeling good behavior and self-help skills. They helped in walking to the park and being safe buddies, just like in a large family. I don’t feel we can do that without more help. Too many young kiddos for field trips.”*

— FCC Educator, Humboldt County

*“I got a double whammy when a child left for the TK program and then was accepted in the Boy and Girls afterschool program at the same school. And I already paid for a two-year curriculum program that included teaching support and materials, items for indoor and outdoor activities, arts and crafts, science projects, STEAM, and child-based learning opportunities.”*

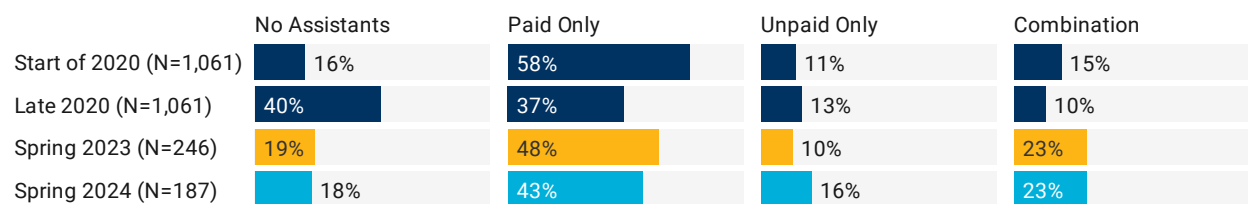
— FCC Educator, Los Angeles County

## Some FCC providers—more commonly large FCC providers—work with an assistant.

- The majority of large FCC providers had a paid assistant in 2024 (67 percent, compared with only 23 percent of small FCC providers).
- During the height of the pandemic in late 2020, large FCC providers were twice as likely to be working alone compared to any other time during our period of study (2020-2024).
- Overall, the share of large FCC educators with a paid assistant fell from 58 percent in 2020 to 43 percent in 2024.

### Providers Working With Assistants

California Large Family Child Care Providers, 2020-2024

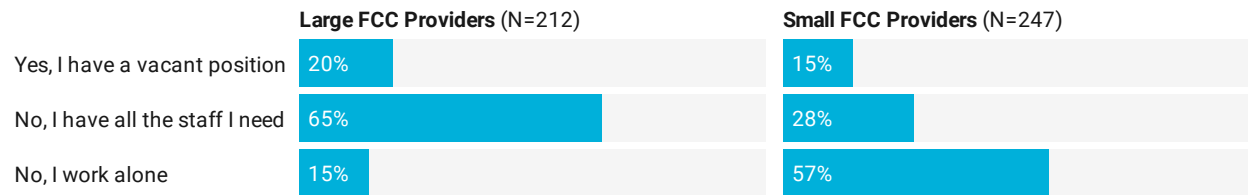


Source: Center for the Study of Child Care Employment, University of California, Berkeley

Some FCC providers have a vacant assistant position, though more often the program is fully staffed or the educator works alone.

## Providers With a Vacant Assistant Position, By License Type

California Family Child Care Providers, 2024



Source: Center for the Study of Child Care Employment, University of California, Berkeley

Some FCC educators are worried about TK's impact on their ability to hire and retain an assistant, but most respondents did not perceive an impact.

*"TK programs are able to offer assistants top dollar. Obviously assistants aren't rushing to home-based programs paying minimum wage."*

— FCC Educator, Sacramento County

*"Staffing is a mess since COVID, and I can't say it relates to TK. The fast food wage of \$20 an hour is affecting my staffing."*

— FCC Educator, Kern County

*"I work alone and have not been affected by TK. I prefer working with children under four anyway and have encouraged parents to seek preschool when their children turn three or three and a half."*

— FCC Educator, San Diego County

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<sup>1</sup>The sample in 2020 included approximately 2,200 family child care educators, approximately half of whom held a small license. Our analytical weights adjust the sample by California region and license type. For a map of the five regions grouping contiguous counties, refer to **Figure 2.1** in our [2022 report](#) on early educator compensation. For license type, we weight the data based on whether the site is licensed to serve infants and toddlers or not. Other factors such as program auspices (e.g., for-profit or nonprofit status) are not addressed by weights.

