

San Mateo County Child Care Workforce Study Report

Submitted to: San Mateo County Child Care Partnership
Council

Prepared By: Seed Collaborative
Wednesday, July 27, 2022

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Executive Summary

Executive Summary

Background

From March to July 2022, Seed Collaborative (Seed), in collaboration with Brion Economics, Inc. (Brion) and the San Mateo County Child Care Partnership Council (CCPC), facilitated data collection and analysis as part of a study on trends in the child care workforce (henceforth referred to as “study”). Seed’s role in the study was to gather data to understand the following:

Needs of child care workers in the County of San Mateo

Current wages, benefits, education and credential/permit levels of workers

Number of vacant child care slots

Amount of turnover in staff

Impact of COVID-19 pandemic on staff

Results of the data will help inform the development of recommendations within the County on how to best utilize public resources to further support child care and learning efforts.

Executive Summary

Process and High-Level Themes/Trends

As part of the data collection, Seed first conducted conversations with child care workers via individual interviews and focus group, which formulated the basis of an online, county-wide child care workforce survey that Seed created and distributed.

The results from interviews, focus groups and survey suggested certain trends including the following:

- **Wages and benefits** are currently stagnant in the sector and **need to be increased/competitive to attract additional workers**
- **Current workers would like to see more employee benefits** (e.g., increased vacation days, wellness days) and **more resources for their child care programs** (e.g., increased financial support for renovations, increased budget for materials)
- **Children have experienced delayed development** (e.g., problem solving, motor functions, etc.) **as a result of COVID-19 pandemic**

Executive Summary

High-Level Themes/Trends

There also emerged slight variations (i.e., unexpected data points, data points that didn't visibly emerge in focus group/interviews) within both data sets . Some of those variations included:

- Around **67% (67/101)¹** of directors/owners/administrators have **noted child care vacancies** for their programs, while **41% (41/101) have waitlists**. Several participants in the focus group noted waitlists for infant/toddler care and vacancies for preschool/school-aged children; survey data suggests a waitlist for preschool/school-aged children as well. However, data overall also suggests more vacancies than waitlists across sector.
- Most workers surveyed **66% (212/323) plan to stay in the sector** in the next 12 months; however, data suggests the demographic **most inclined to leave the sector are 18-39 year olds**.

1: There were a total of 323 survey responses. However, certain questions were asked specifically to directors, owners, and administrators; for those questions, total number of responses is at 101.

Process Overview

Process Overview

Data Collection and Analysis Methodology

- **Focus Group/Interviews**
 - Focus group/interviews conducted March 24 – March 28
 - 1 English-language focus group (approximately 20 participants)
 - 2 individual Spanish-language interviews
 - 2 X \$25 gift card incentives offered
 - One round of distillation of interview/focus group notes; one round of coding
- **County-Wide Online Survey**
 - Survey open May 13 – June 3
 - 43 questions total (including a specific batch of questions solely for administrators/directors/owners)
 - Survey offered in English, Spanish and Traditional Chinese
 - 323 total responses (272 in English, 43 in Spanish, and 8 in Chinese)
 - Review of all aggregated data; disaggregation of select data points
 - 4 X \$75 gift card incentives offered

Focus Group/Interview Analysis

Focus Group/ Interview Analysis

Landscape of the Sector

- Overall, workers expressed **challenges** within the child care sector - particularly in light of the pandemic - as it relates to :
 - Compensation
 - Enrollment
 - Changes in child development
- Issues highlighted included the following:
 - **Challenges with hiring and a lack of staff.** Some reasons included **inability to offer competitive pay/benefits packages** and challenges **finding qualified/credentialed applicant pool**
 - Some workers noted a **diminished enrollment of preschool and school-aged children**; others have **waitlist for infants and toddlers**

Focus Group/ Interview Analysis

Landscape of the Sector

- When asked about increased demand for infant care, workers expressed some of the challenges with accommodating infants, including:
 - **Having the necessary equipment and infrastructure** to support infants;
 - **Fulfilling necessary training requirements;**
 - **Finding qualified staffing.**
- Some sites had to **close temporarily** due to COVID-19 exposures
- Workers overall expressed **stagnation regarding pay and benefits**
- **Family child care programs were perceived to be struggling more than centers** due to lack of infrastructure and stability (i.e. not as much staff, not as many employee benefits, etc.) compared to centers

Focus Group/ Interview Analysis

Child Development Themes

- Children are showing up **developmentally younger than their actual age**. Some of these changes included:
 - Challenges with problem solving (i.e., talking with each other to resolve conflict; sharing objects; expressing feelings)
 - Lagging social/emotional development, including emotion expression
 - Lagging motor development including balance
 - Challenges with clarity of speech
- **Noticeable stress and anxiety in children**; some workers noticed that **parental stress may have been transferred to the children**
- Some workers expressed that with **smaller classroom sizes** (i.e., small teacher to student ratios), **they can provide better support and attention to students.**

Focus Group/ Interview Analysis

Suggested Changes for the Sector

- Workers expressed a myriad of solutions they would like to see from SMC. Some of the proposed ideas included:
 - More financial support (i.e., for materials, supplies, renovation costs)
 - More educational support
 - More support with marketing/advertising of child care services
 - More support for for-profit family child care
 - Keeping smaller classroom sizes (i.e., smaller teacher to student ratios)
 - Establishing a network of child care workers (for example, network could be useful if a child care worker was out sick and a program/center needed to find a temporary replacement)

Survey Findings

Survey Findings

Survey Overview

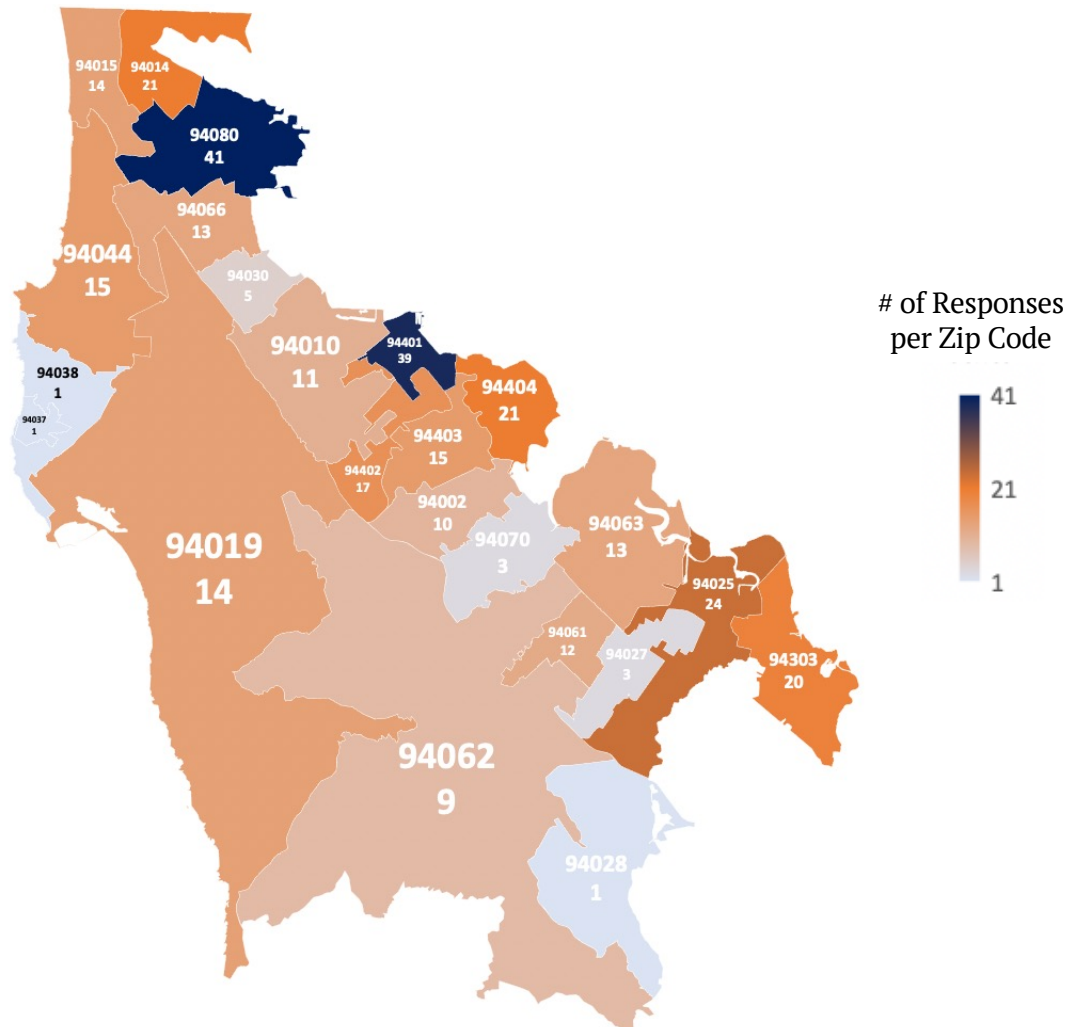
- Seed utilized the focus group/interview findings as the basis of the survey development. As such, the survey inquired about the following:
 - **Employment conditions** (i.e., age of children served by place of employment, language(s) used for instruction, impact of COVID on workplace and child development)
 - **Quality of life** (i.e., cost of living metrics, employee satisfaction, wanting to leave or stay in the child care sector)
 - **Opportunities for change** in the sector
 - **Demographics** (i.e., wages, employee benefits, education and credentialing/training levels)

Survey Findings

Survey Overview

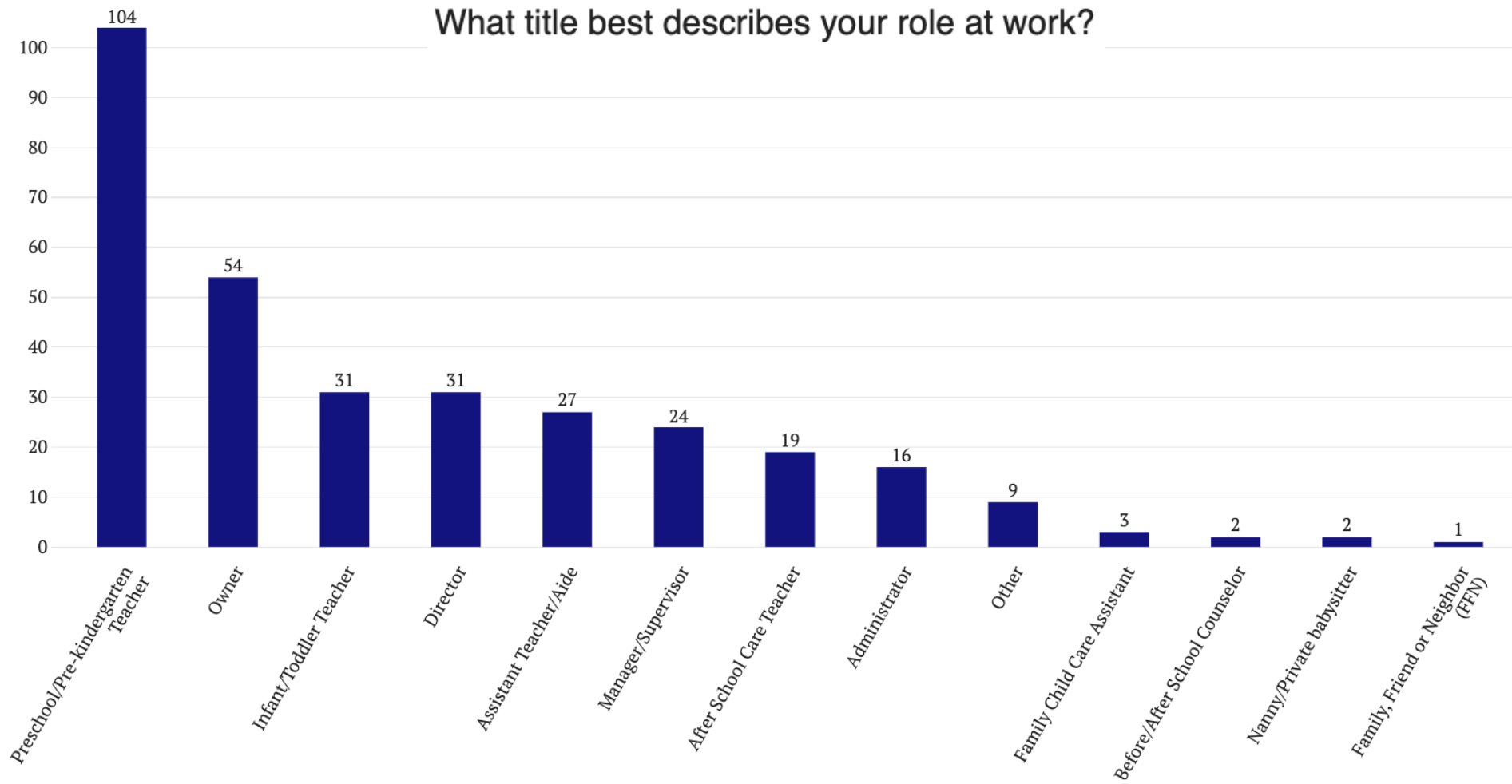
- Overall, survey **aligned** with focus group/interview findings, such as:
 - Noticeable **changes in child development** due to impact of COVID-19 pandemic
 - Desire for **increased worker benefits** and **compensation**
- Slight variations or unexpected data results included:
 - **Waitlists vs vacancies per demographic:** Focus group/interview findings against survey findings differed on frequency of waitlists and vacancies for child care slots. However, survey indicates **vacancies overall** across the sector.
 - **Sector Growth:** Focus group/interview findings suggest challenges in hiring more staff (i.e. not providing alluring benefits package). Most workers surveyed **66% (212/323) plan to stay in the sector** in the next 12 months; however, data suggests the demographic **most inclined to leave the sector are 18-39 year olds.**
- The following slides will show aggregated data results of sector demographics, followed by additional analysis of the survey findings.

Sector Demographics Information: Zip Codes Where Child Care Employees Work (View 1)

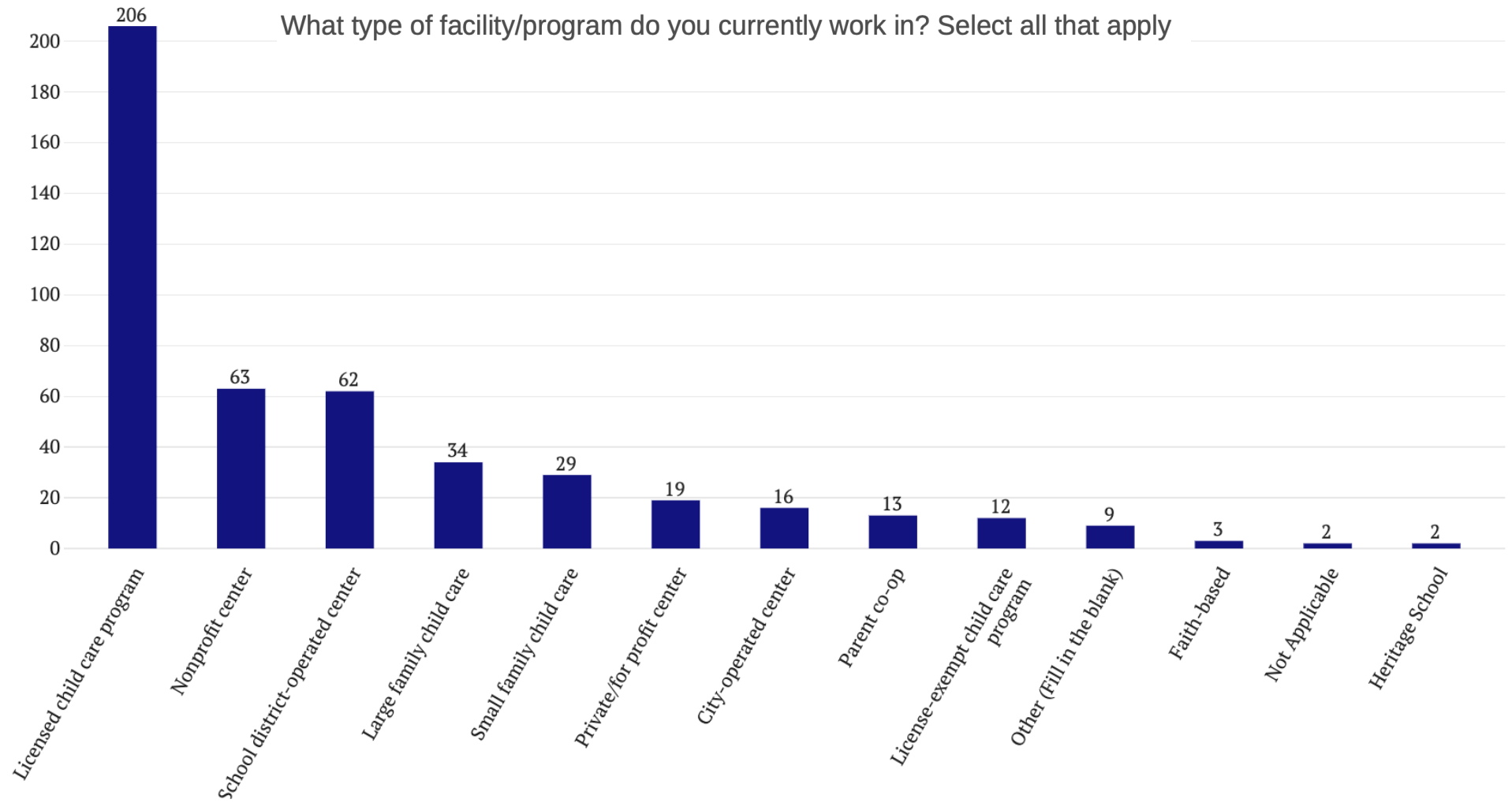


# of Responses	Zip Code/City
41	94080: South San Francisco
39	94401: San Mateo
24	94025: Menlo Park
21	94404: San Mateo; Foster City
21	94014: Daly City; Colma
20	94303: East Palo Alto
17	94402: San Mateo
15	94403: San Mateo
15	94044: Pacifica
14	94019: Half Moon Bay; El Granada
14	94015: Daly City
13	94066: San Bruno
13	94063: Redwood City
13	94061: Redwood City; Woodside
12	94010: Burlingame; Hillsborough
11	94002: Belmont
10	94062: Redwood City
9	94030: Millbrae
5	94038: Moss Beach
3	94070: San Carlos
3	94027: Atherton
1	94037: Montara
1	94028: Portola Valley

Sector Demographics Information

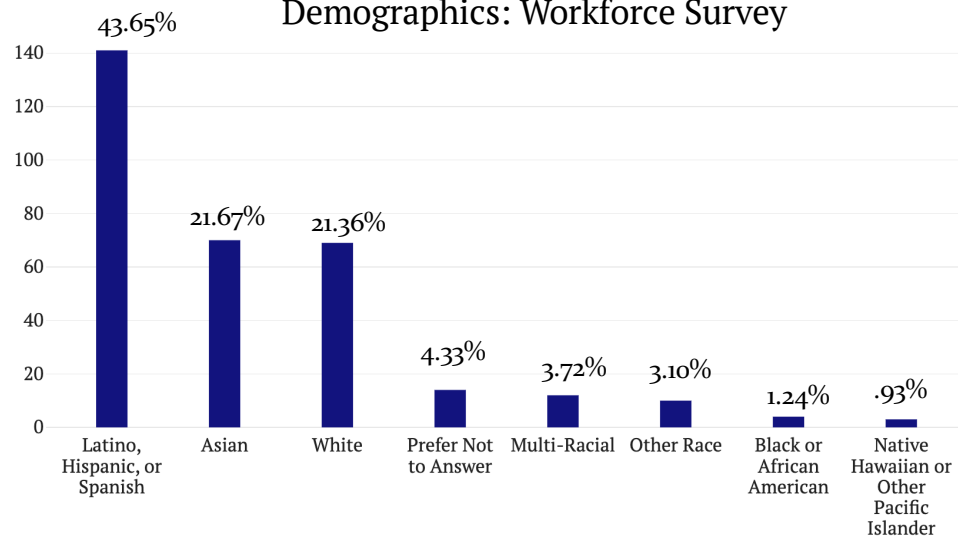


Sector Demographics Information

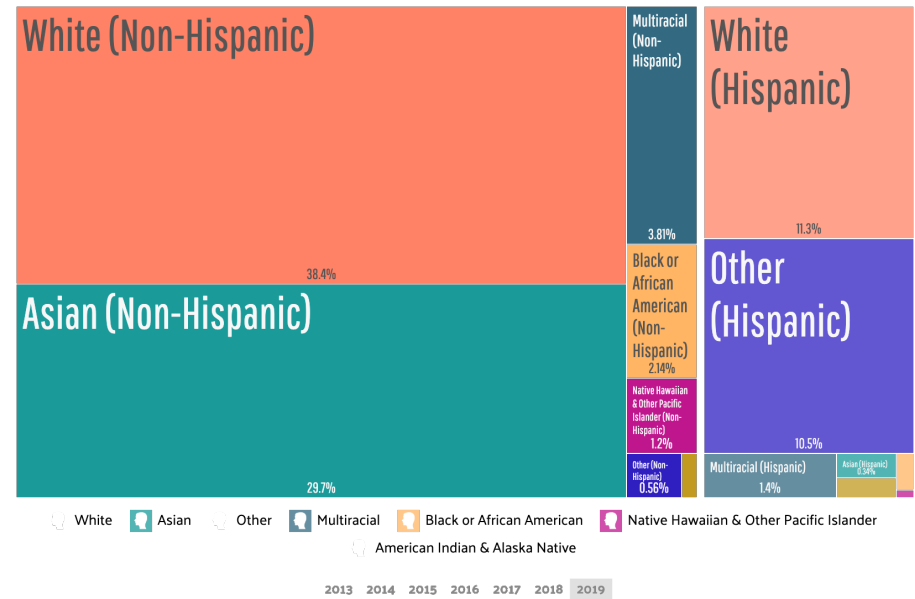


Sector Demographics Information: Race/Ethnicity

Demographics: Workforce Survey



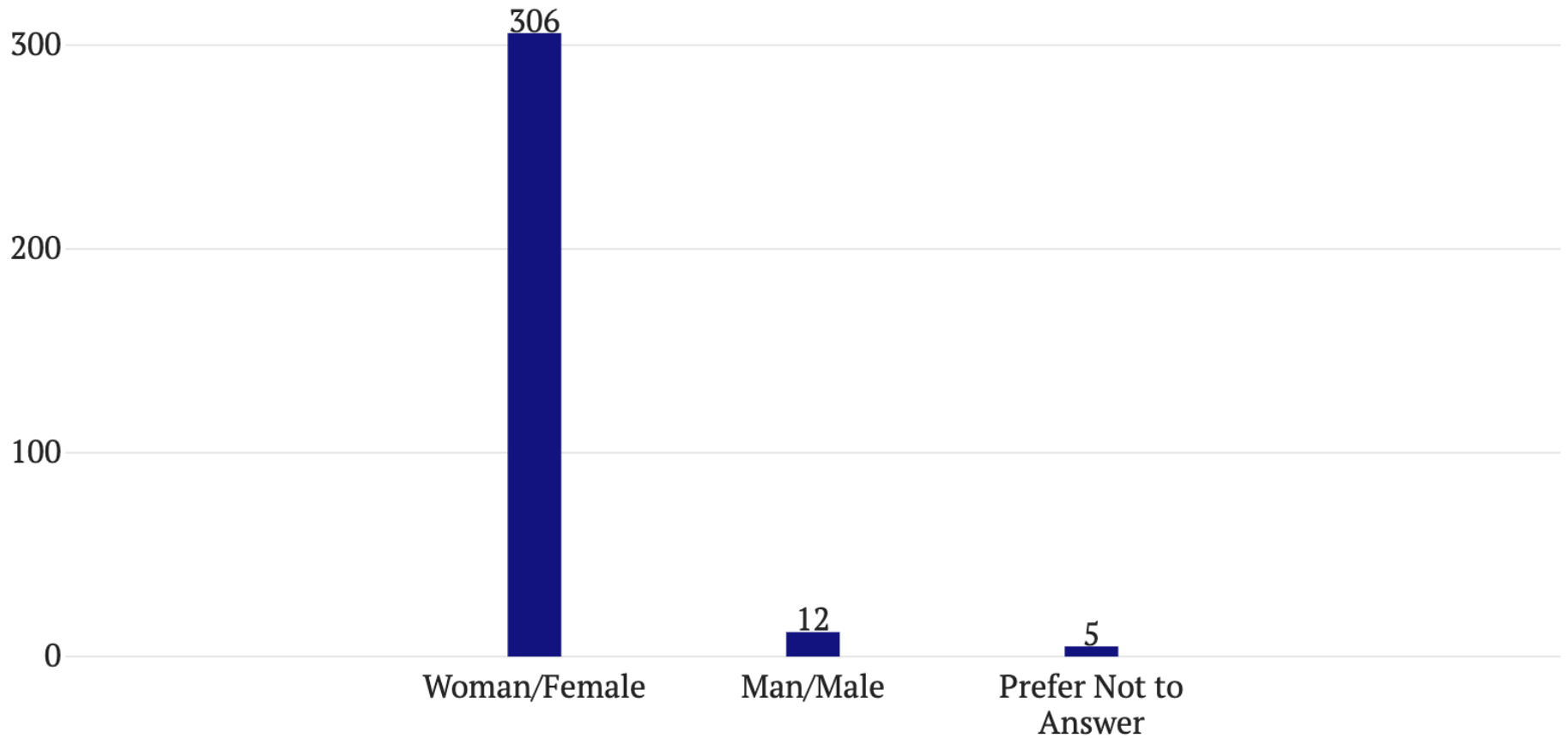
Demographics: San Mateo County



SMC data representing 2019 demographics; 24% of county identify as Latino
 Source for SMC data: datausa.io

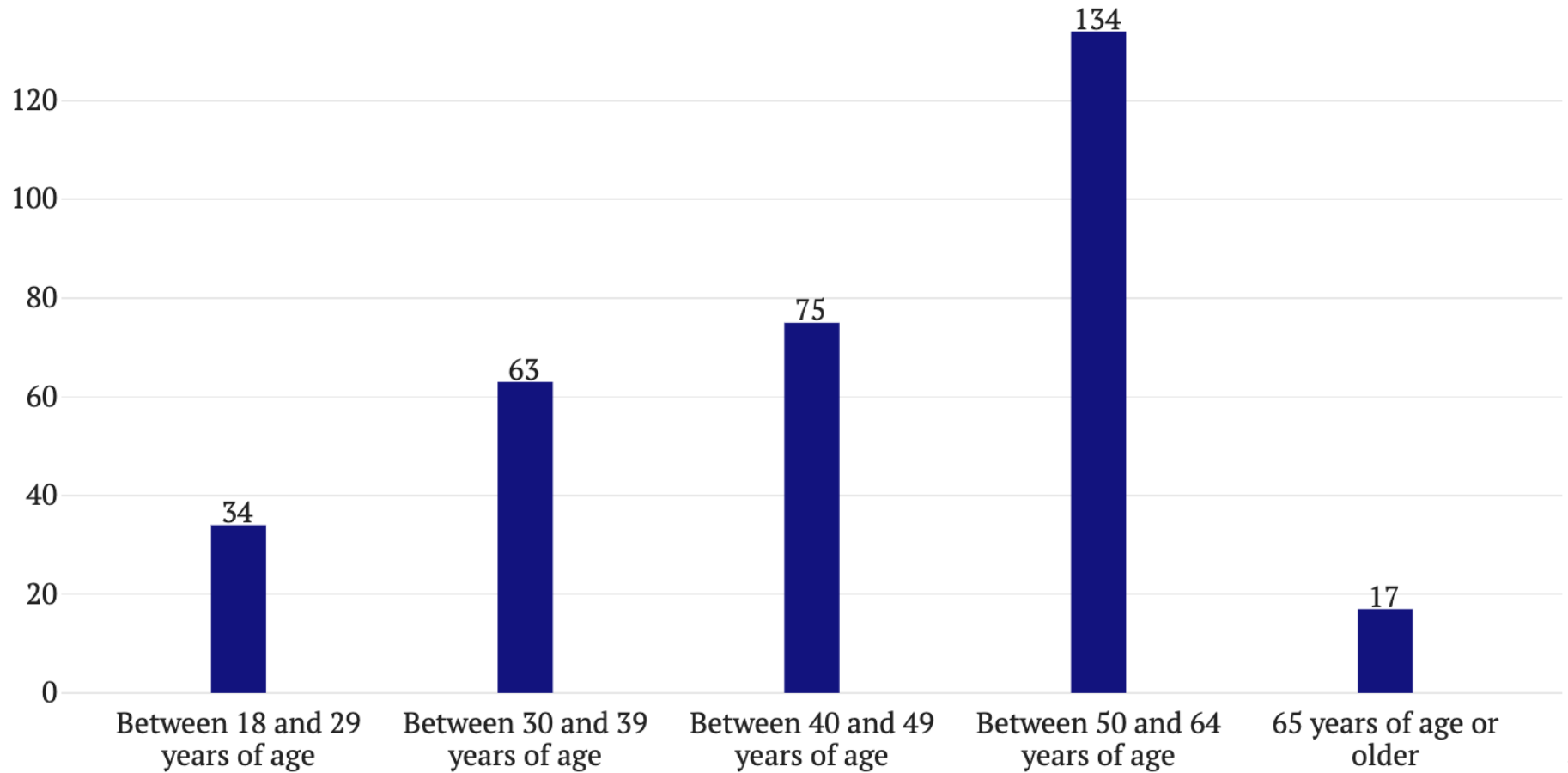
Sector Demographics Information

What is your gender identity?



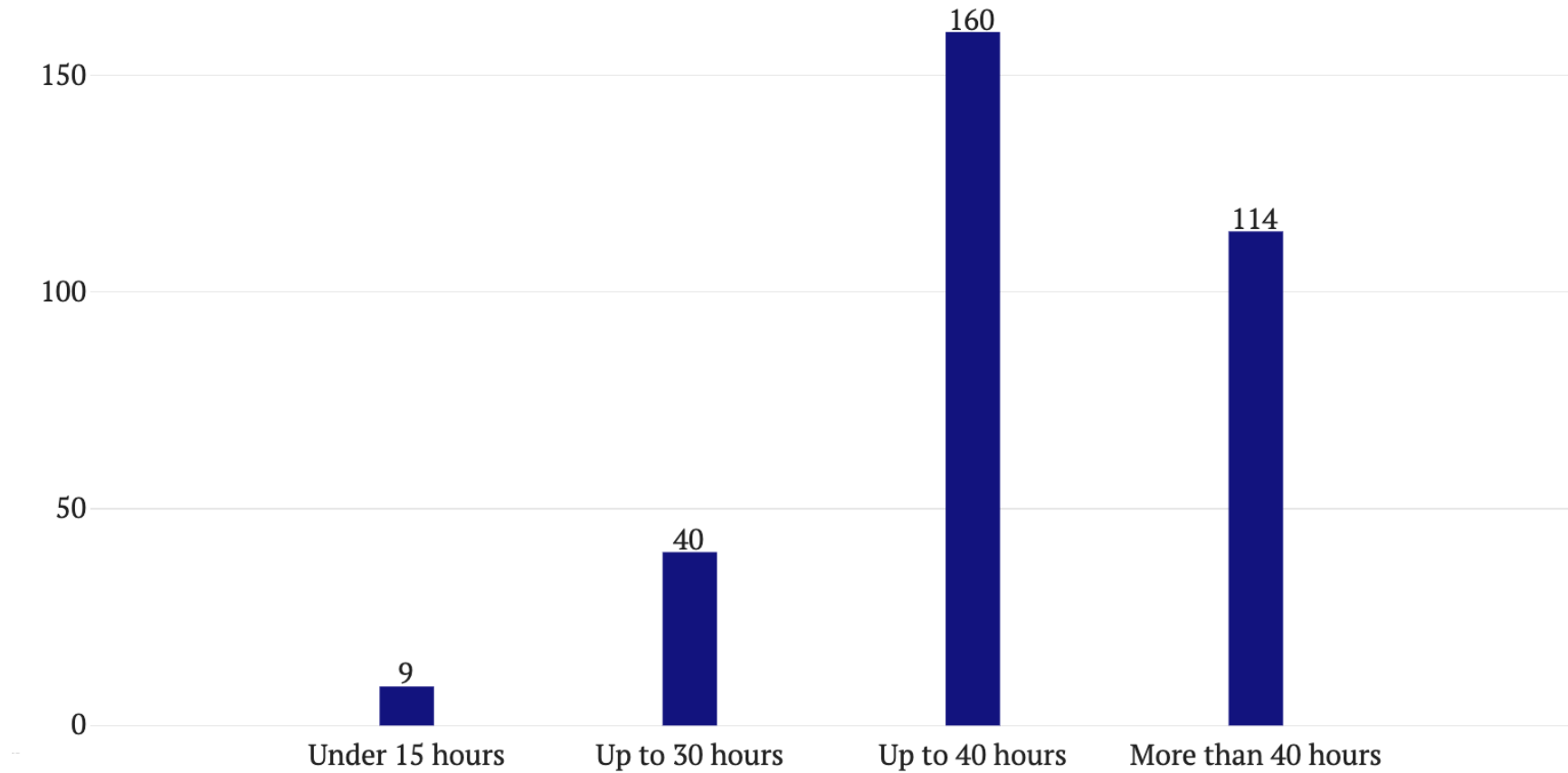
Sector Demographics Information

How old are you?



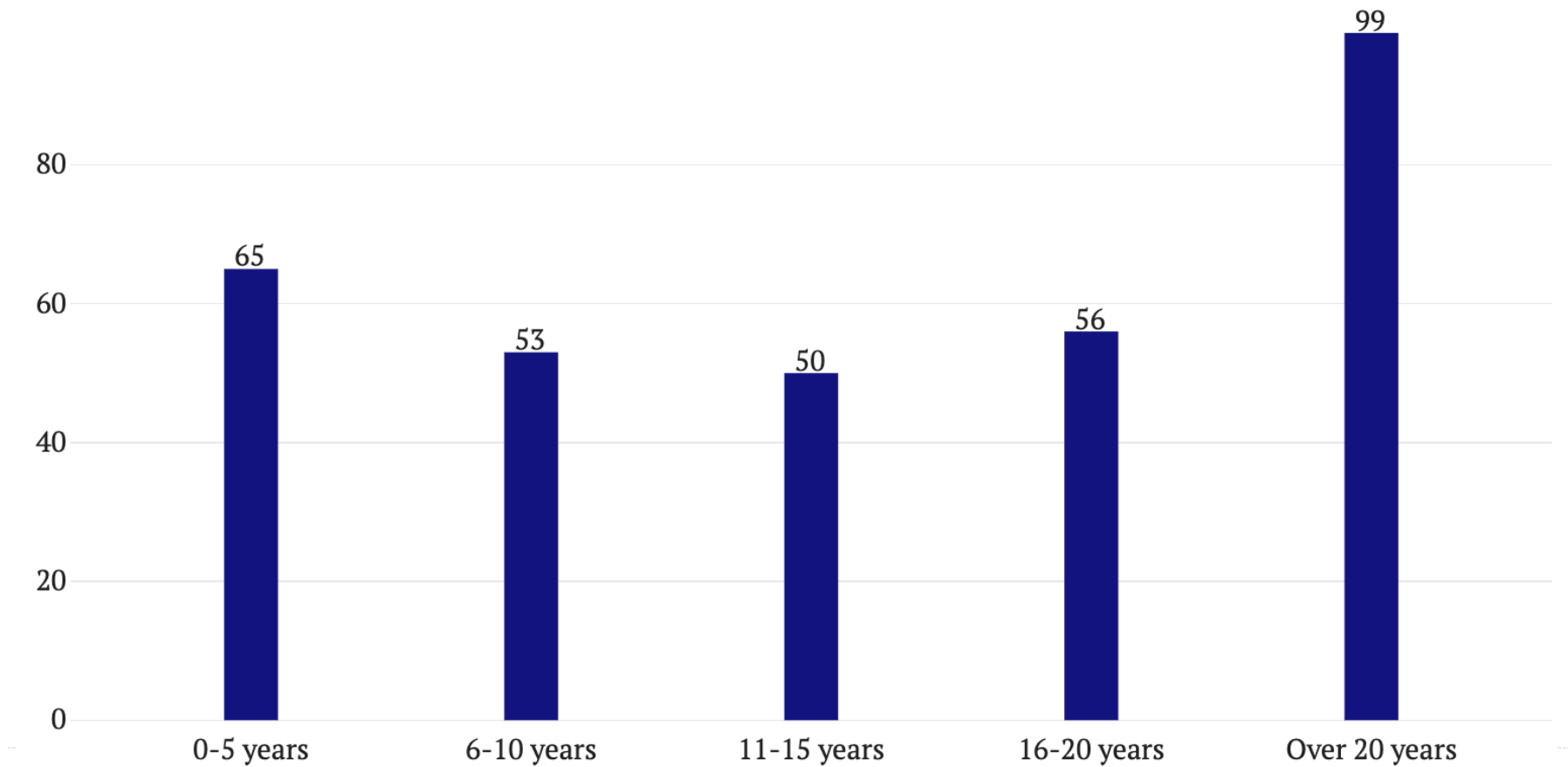
Sector Demographics Information

How many hours per week do you work?



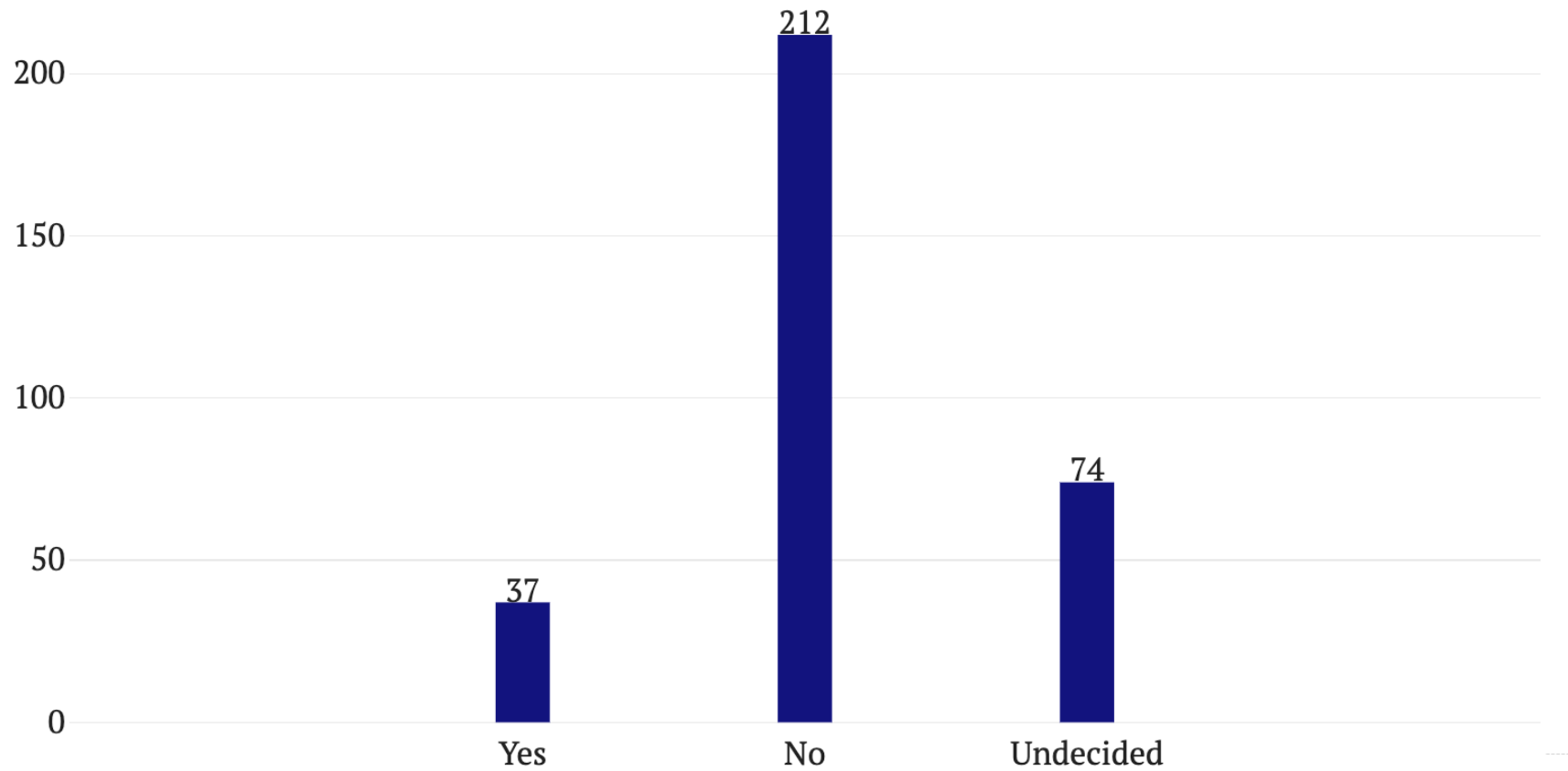
Sector Demographics Information

How long have you worked in the child care and/or early learning field?

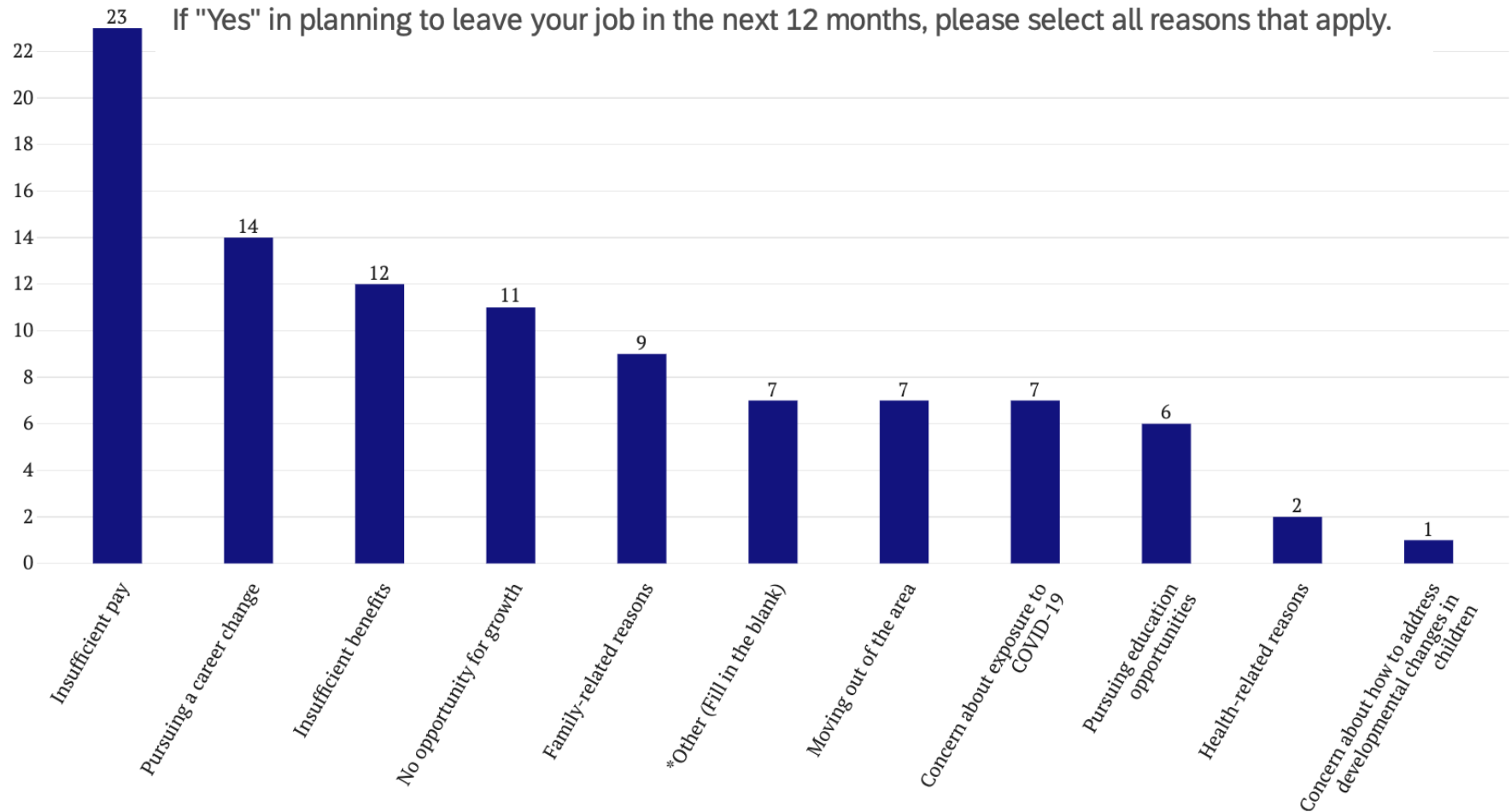


Sector Demographics Information

Are you planning to leave your job within the next 12 months?



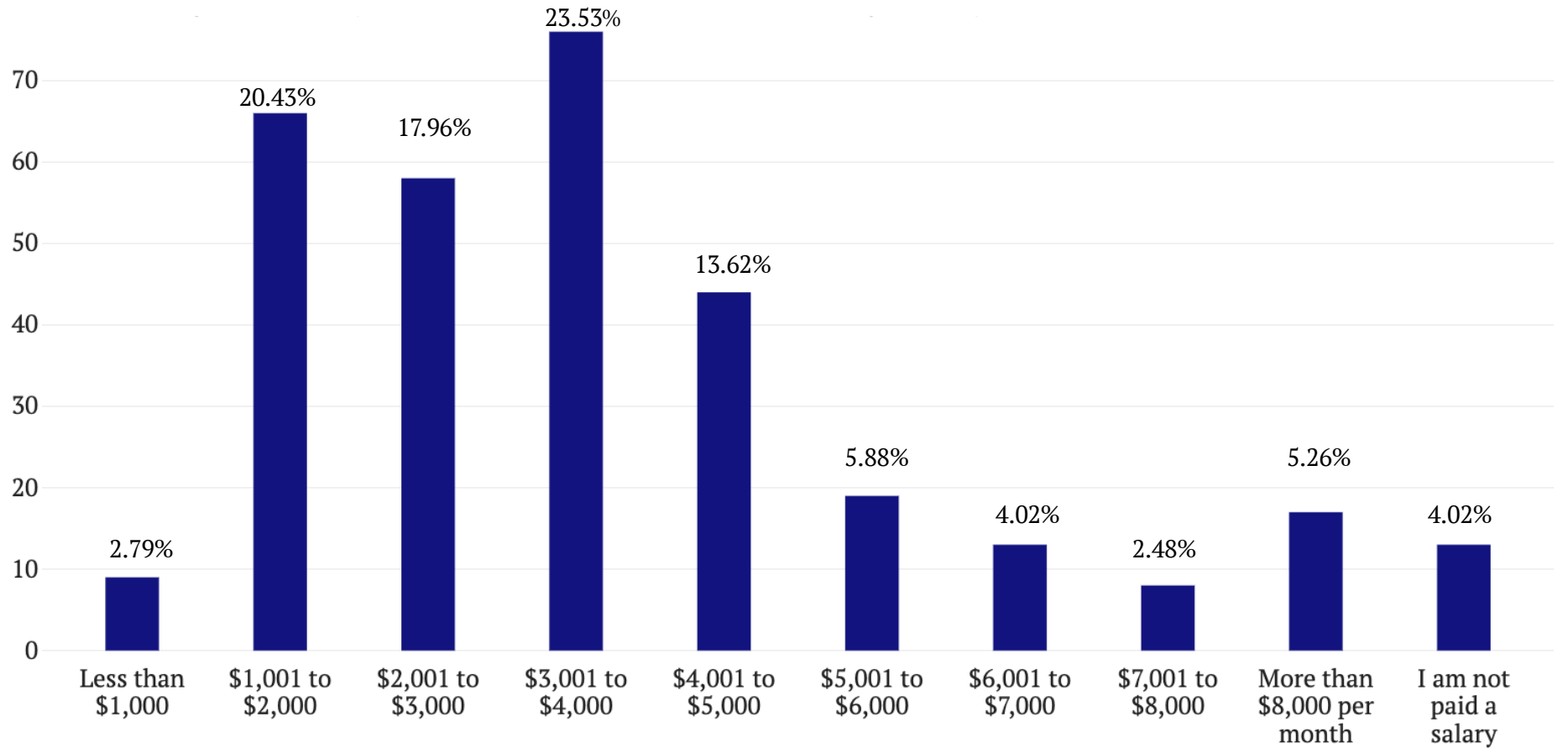
Sector Demographics Information



* For "Other", responses included wanting to retire, working under difficult leadership or management, and inability to afford cost of living.

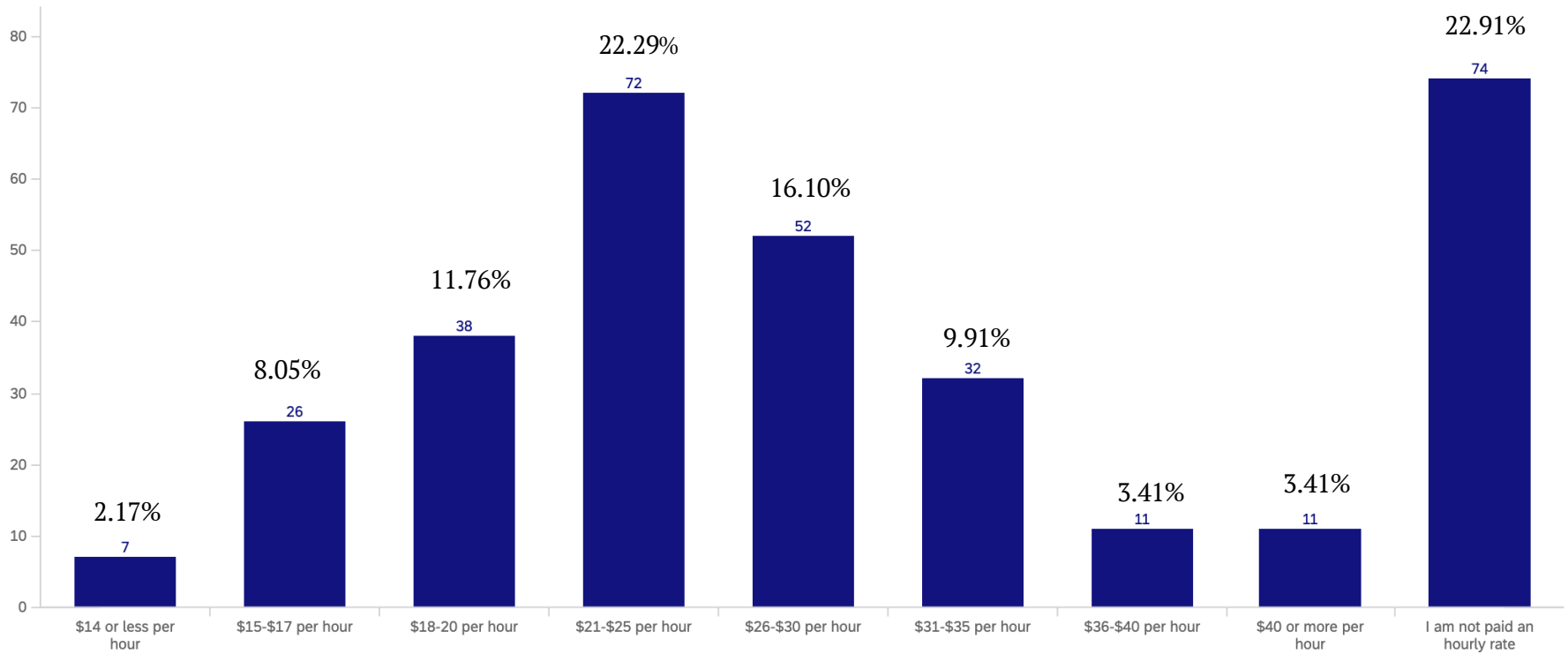
Sector Demographics Information

On average, what are you paid each month before taxes (total gross pay)?



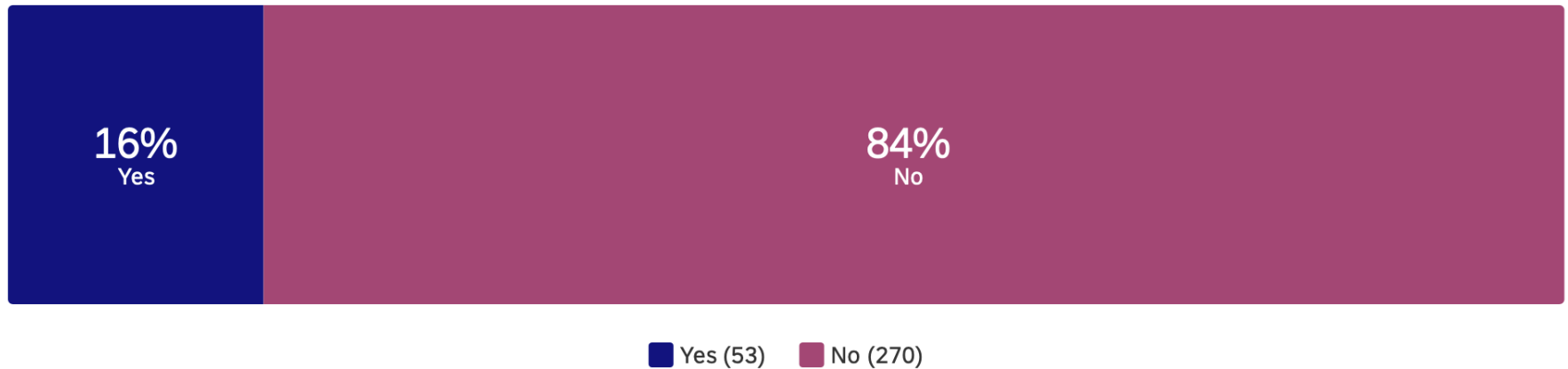
Sector Demographics Information

What is your hourly rate before taxes?

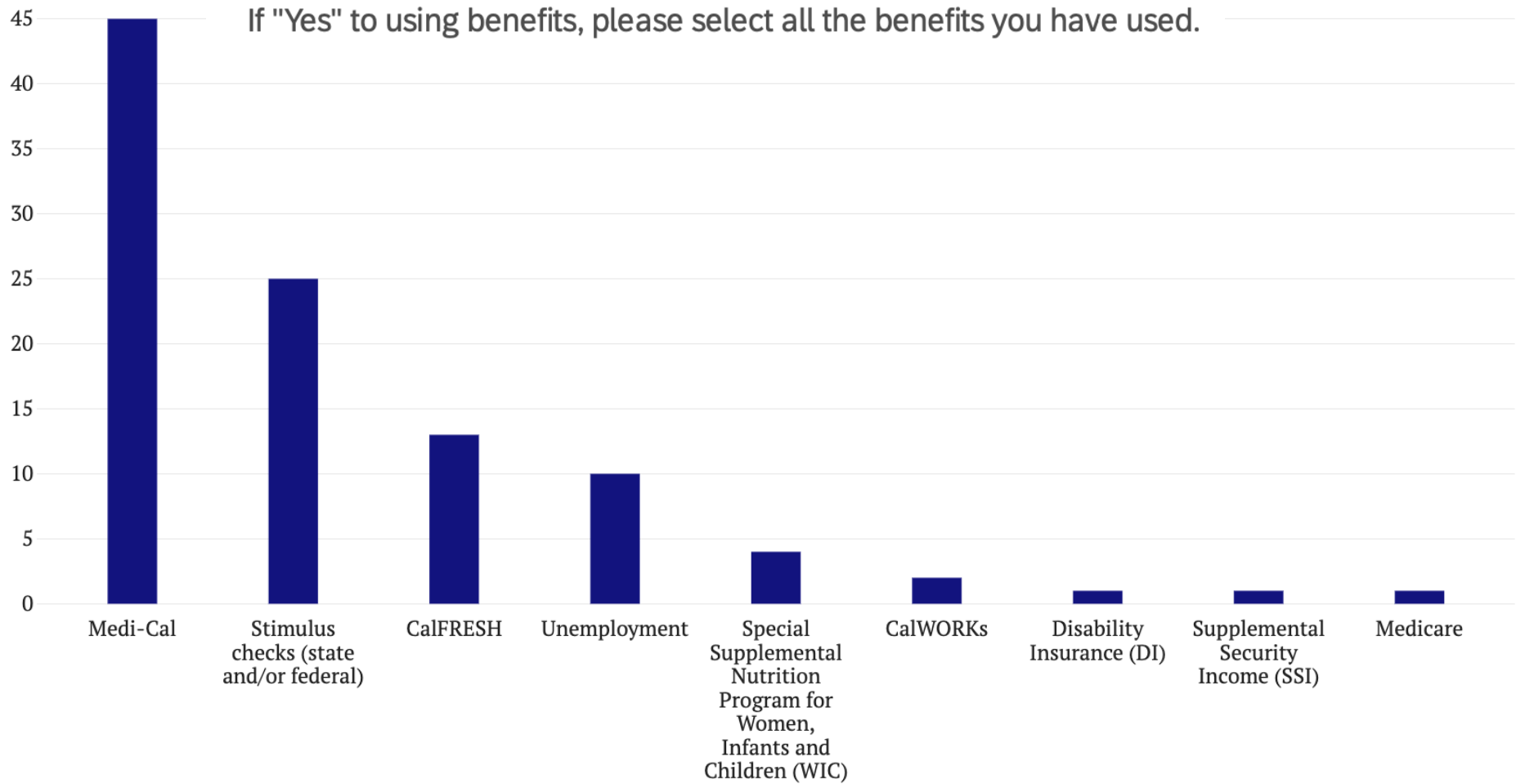


Sector Demographics Information

In the past 24 months, have you used public benefits/assistance (i.e., SNAP benefits, Medi-Cal)?

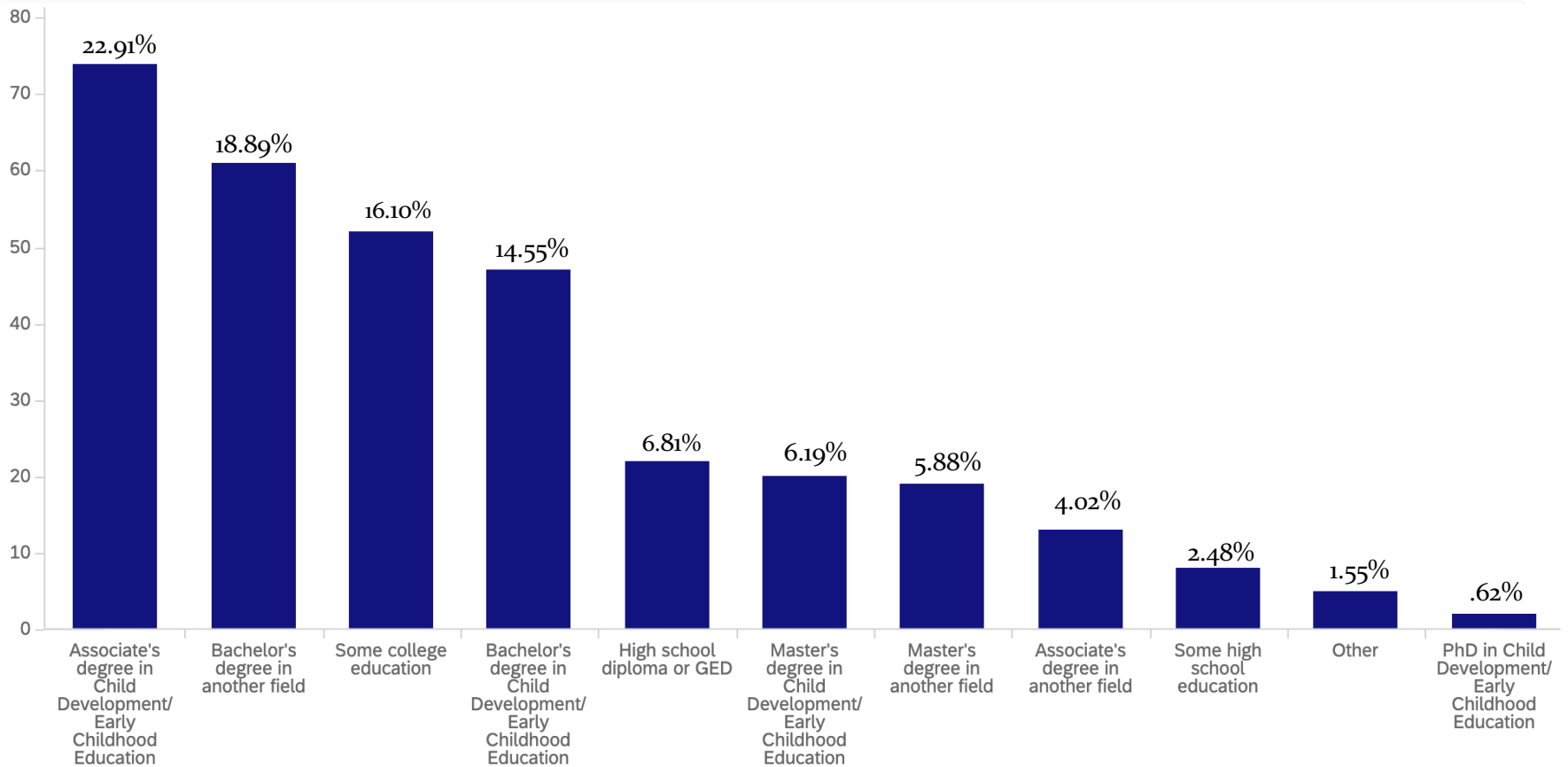


Sector Demographics Information



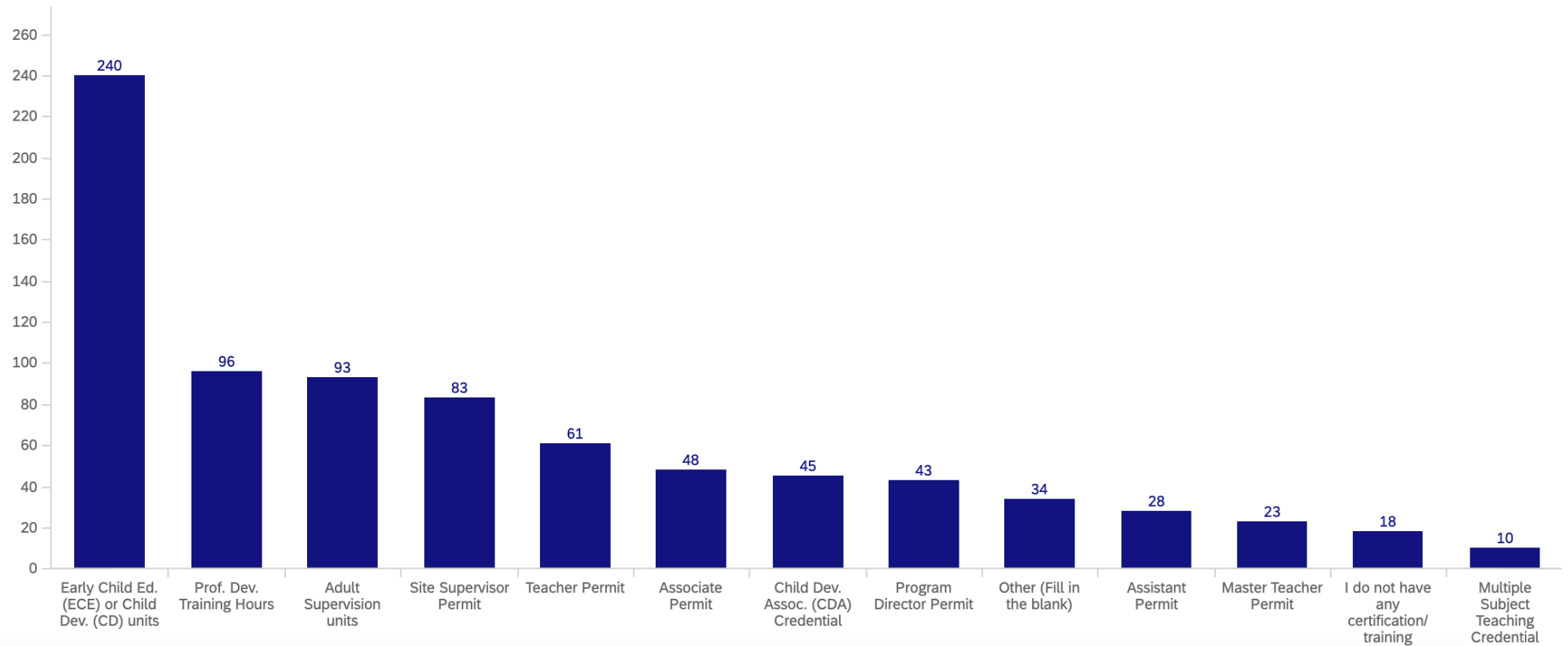
Sector Demographics Information

What is the highest level of education you have completed? Please select the closest option.



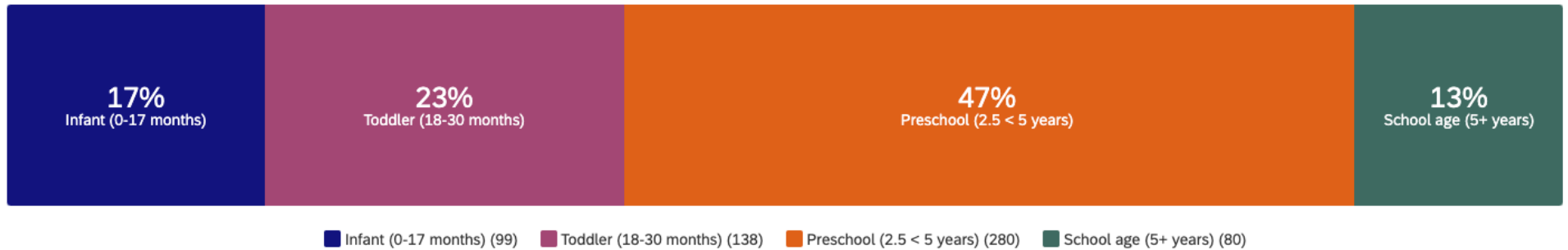
Sector Demographics Information

What credentials/trainings have you received? Select all that apply.



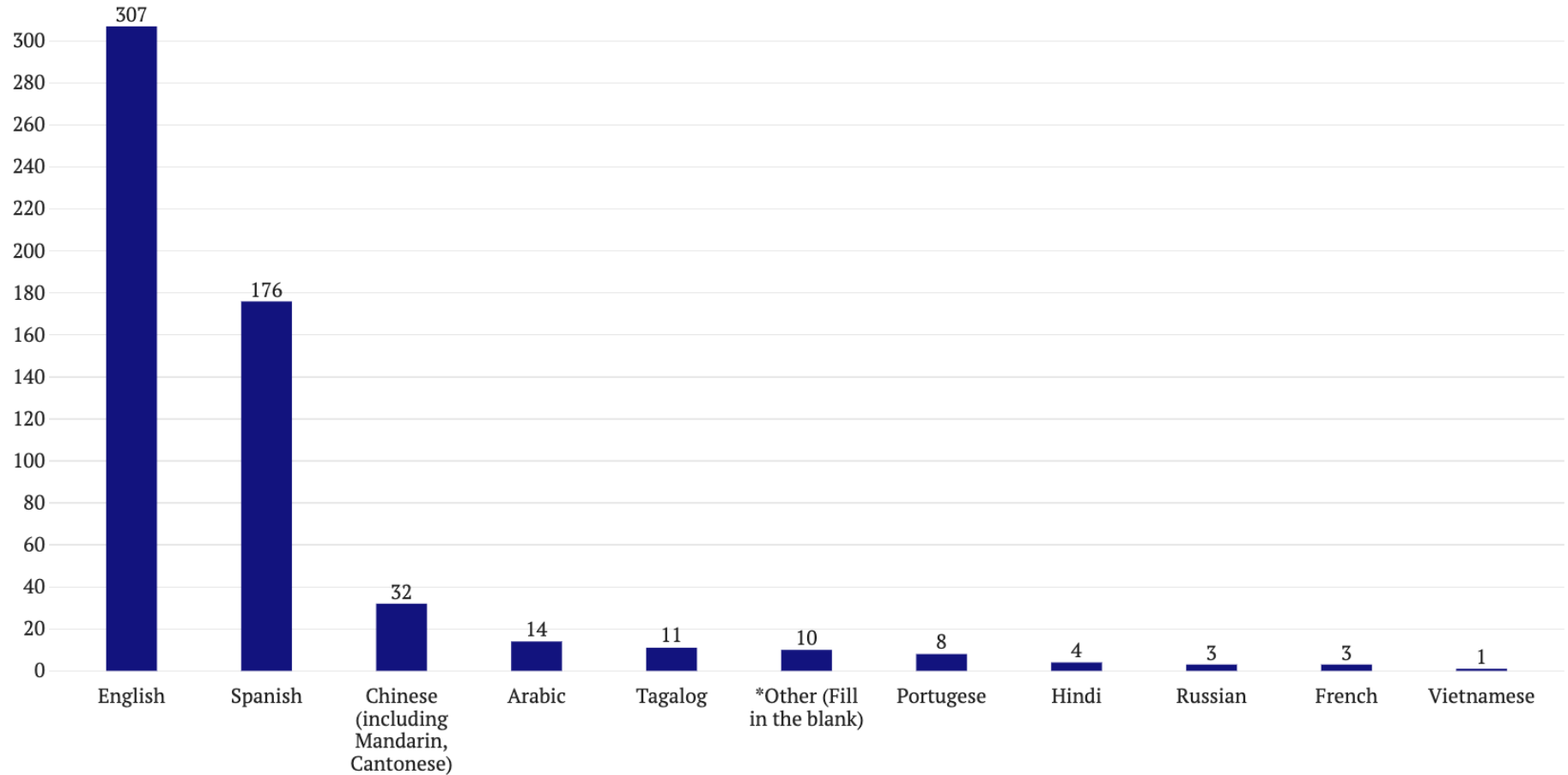
Sector Demographics Information

How old are the children served by your place of employment? Select all that apply.



Sector Demographics Information

What languages are used for instruction in your classroom or child care program? Select all that apply.



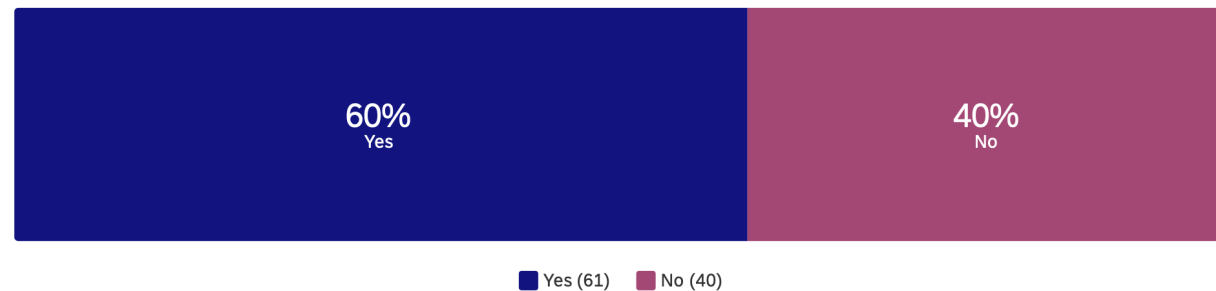
* For "Other", responses included American Sign Language (ASL), Japanese, Marathi, Gujarati, and Bengali.

Survey Findings

Landscape of the Sector

Challenges with hiring and a lack of staff. 60% (60 of 101) of owners/directors/administrators said they needed to raise wages to attract more staff, and 31% (31 of 101) say they are currently understaffed.

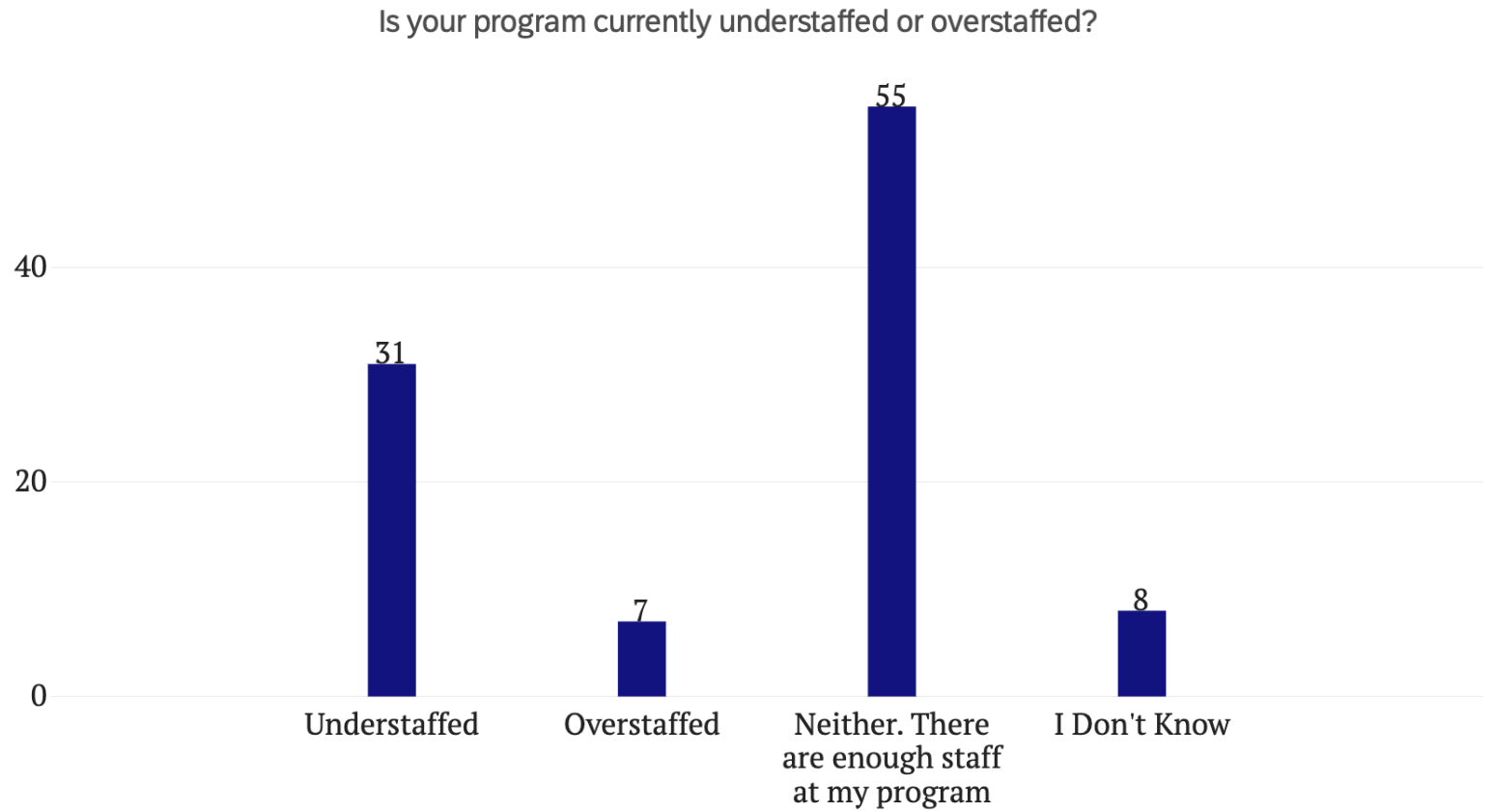
Do you need to raise wages to attract/hire more staff?



This question was shown specifically to owners, directors, and administrators; therefore, totally number of responses to this question are 101.

Survey Findings

Landscape of the Sector

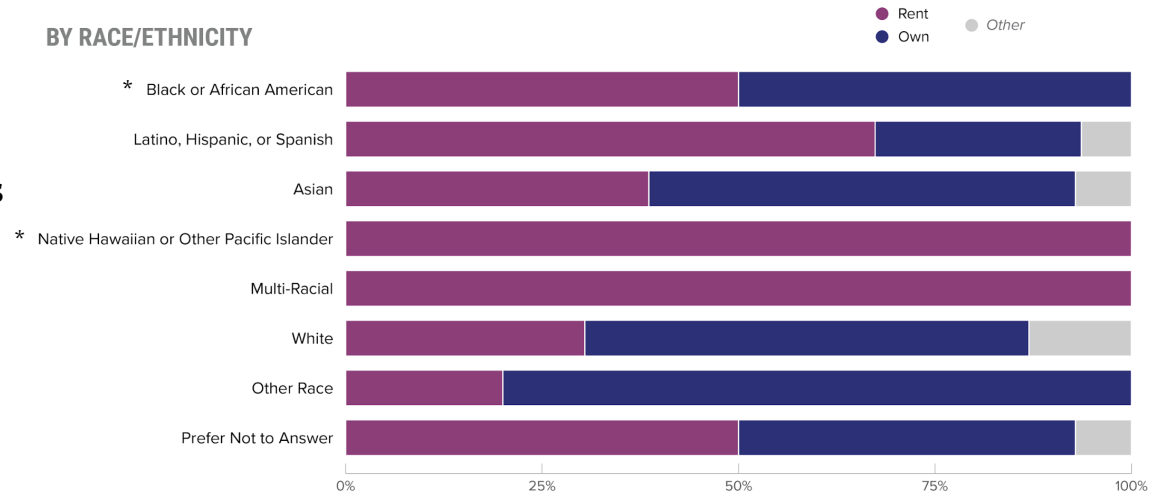


This question was shown specifically to owners, directors, and administrators; therefore, totally number of responses to this question are 101.

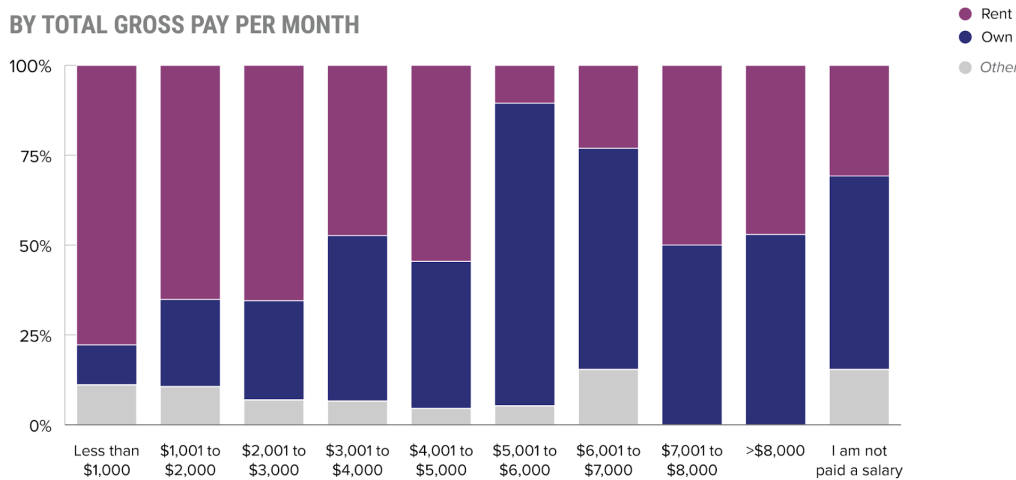
Landscape of Sector

Most workers are **renters (52% or 169/323)**; however, home ownership reflect potential class and racial stratification (i.e. higher wage workers and workers who identify as White being more inclined to own homes).

BY RACE/ETHNICITY



BY TOTAL GROSS PAY PER MONTH



* Indicates low response rate (<10 responses) per demographic

Survey Findings

Landscape of Sector

Per the survey results, salaries for child care workers averages around **\$3,000-\$4,000 gross per month**. When wages are compared to cost of living metrics, lower wage earners tend to struggle more than higher wage earners to afford various living expenses. However, individuals making higher amount overall are able to afford cost of living, while still struggling to afford rent/mortgage costs.

Cost of Living Metrics Against Monthly Pay



* Indicates low response rate (<10 responses) per demographic

Survey Findings

Landscape of Sector

Cost of Living Metrics Against Monthly Pay



* Indicates low response rate (<10 responses) per demographic

Landscape of Sector

Cost of Living against Pay (alternative visual)

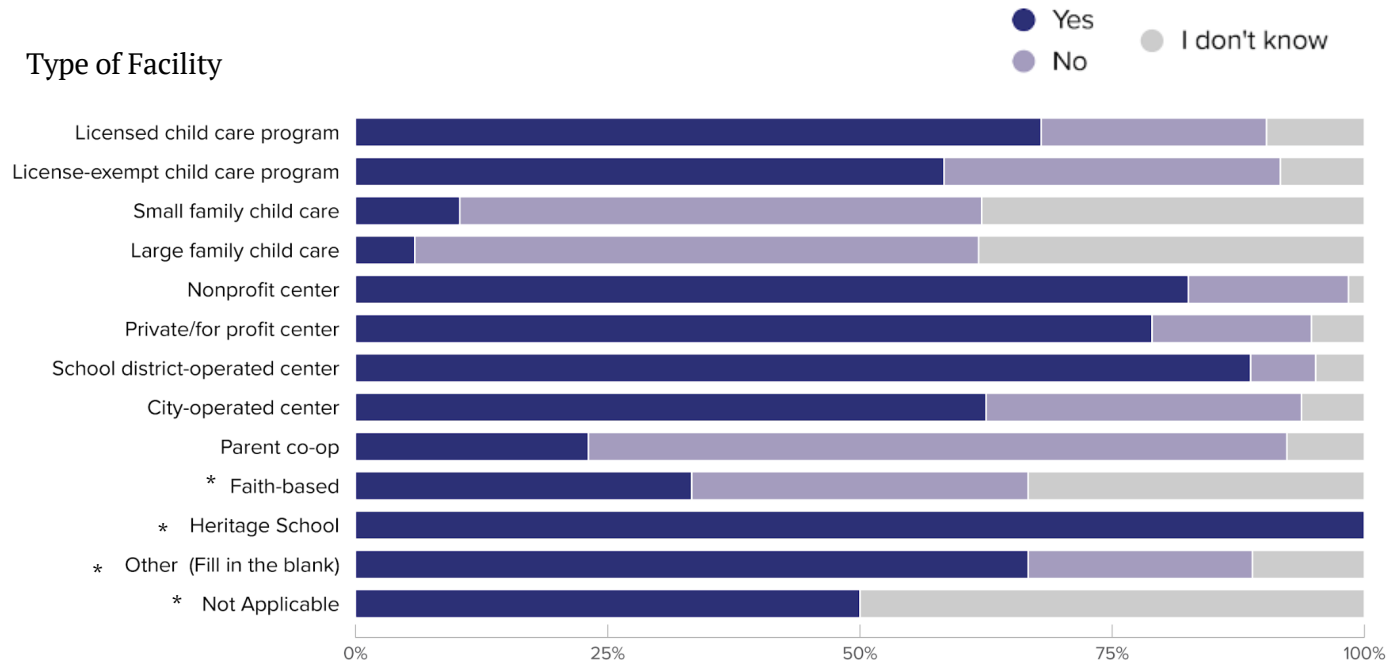
	Total	Less than \$1,000	\$1,001 to \$2,000	\$2,001 to \$3,000	\$3,001 to \$4,000	\$4,001 to \$5,000	\$5,001 to \$6,000	\$6,001 to \$7,000	\$7,001 to \$8,000	More than \$8,000 per month	I am not paid a salary
Total Count (All)	323.0	9.0	66.0	58.0	76.0	44.0	19.0	13.0	8.0	17.0	13.0
I am able to afford the cost of living in my area, plus save additional money	34.0 10.5%	0.0 0.0%	7.0 10.6%	1.0 1.7%	6.0 7.9%	5.0 11.4%	3.0 15.8%	3.0 23.1%	2.0 25.0%	5.0 29.4%	2.0 15.4%
I am able to afford the cost of living in my area, but I do not have money left over for savings	154.0 47.7%	1.0 11.1%	27.0 40.9%	25.0 43.1%	40.0 52.6%	24.0 54.5%	10.0 52.6%	4.0 30.8%	6.0 75.0%	9.0 52.9%	8.0 61.5%
I work more than one job to afford the cost of living in my area	71.0 22.0%	5.0 55.6%	11.0 16.7%	20.0 34.5%	16.0 21.1%	7.0 15.9%	5.0 26.3%	3.0 23.1%	0.0 0.0%	2.0 11.8%	2.0 15.4%
I struggle to afford my rent/mortgage	116.0 35.9%	6.0 66.7%	23.0 34.8%	31.0 53.4%	28.0 36.8%	14.0 31.8%	5.0 26.3%	3.0 23.1%	1.0 12.5%	3.0 17.6%	2.0 15.4%
I struggle to afford food	56.0 17.3%	4.0 44.4%	10.0 15.2%	15.0 25.9%	15.0 19.7%	5.0 11.4%	3.0 15.8%	2.0 15.4%	0.0 0.0%	0.0 0.0%	2.0 15.4%
I struggle to afford child care	26.0 8.0%	1.0 11.1%	10.0 15.2%	6.0 10.3%	6.0 7.9%	1.0 2.3%	0.0 0.0%	0.0 0.0%	1.0 12.5%	1.0 5.9%	0.0 0.0%
I struggle to afford transportation services (including gas, rideshare and/or public transport)	79.0 24.5%	4.0 44.4%	16.0 24.2%	17.0 29.3%	25.0 32.9%	7.0 15.9%	5.0 26.3%	1.0 7.7%	1.0 12.5%	1.0 5.9%	2.0 15.4%
I struggle to afford healthcare and related items (i.e., doctors visits, medications, etc.)	64.0 19.8%	3.0 33.3%	15.0 22.7%	13.0 22.4%	10.0 13.2%	8.0 18.2%	5.0 26.3%	3.0 23.1%	0.0 0.0%	3.0 17.6%	4.0 30.8%
I struggle to afford personal care expenses (i.e., hair styling, beauty supplies, clothes, gym membership, etc.)	115.0 35.6%	4.0 44.4%	21.0 31.8%	25.0 43.1%	32.0 42.1%	18.0 40.9%	5.0 26.3%	4.0 30.8%	1.0 12.5%	2.0 11.8%	3.0 23.1%
I struggle to afford miscellaneous or unexpected expenses (i.e., going out to a restaurant, sending money to family, repairing my home/apartment)	151.0 46.7%	6.0 66.7%	28.0 42.4%	29.0 50.0%	41.0 53.9%	25.0 56.8%	10.0 52.6%	5.0 38.5%	1.0 12.5%	2.0 11.8%	4.0 30.8%

Survey Findings

Landscape of the Sector

Most workers receive some type of **benefits (63% or 205/323)**, but family child care programs seem to offer less benefit opportunities to workers.

Does your place of employment provide you with benefits?

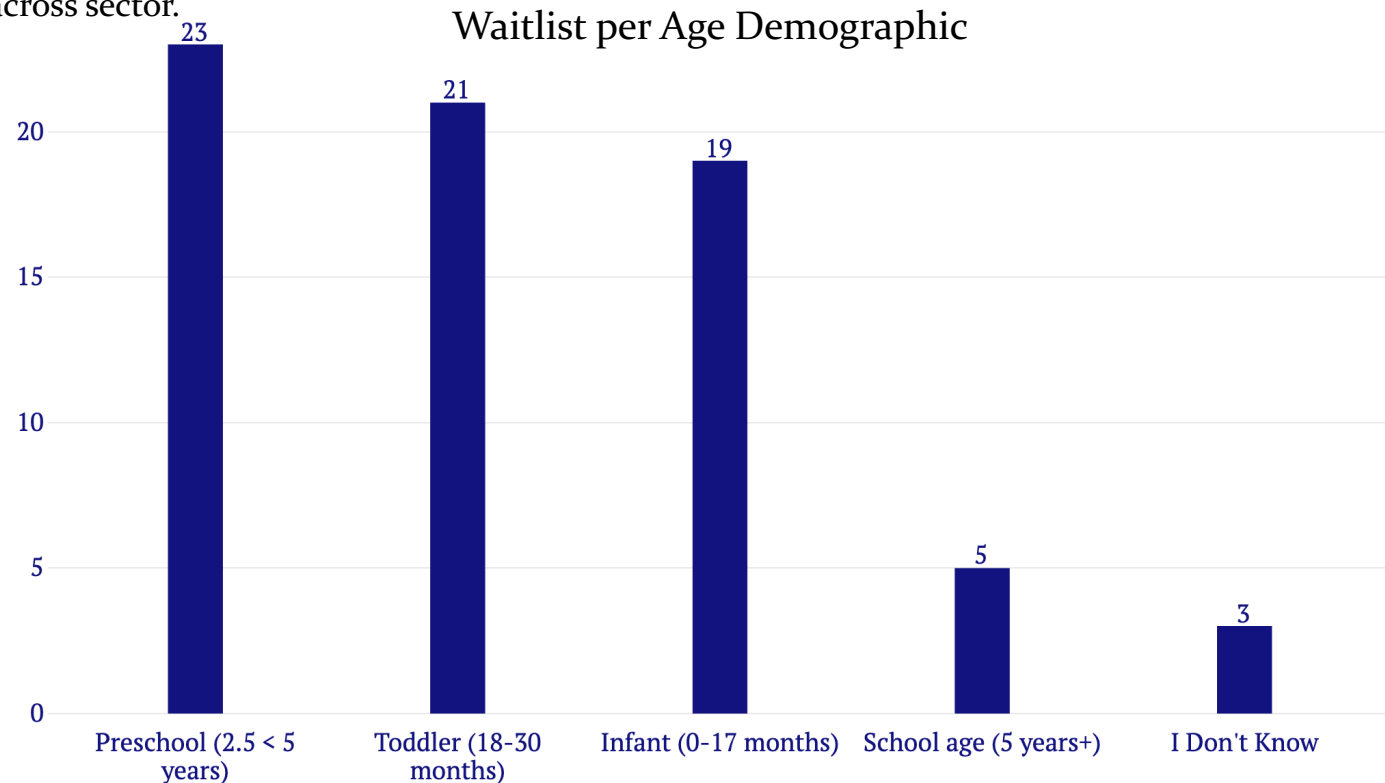


* Indicates low response rate (<10 responses) per demographic

Survey Findings

Landscape of Sector

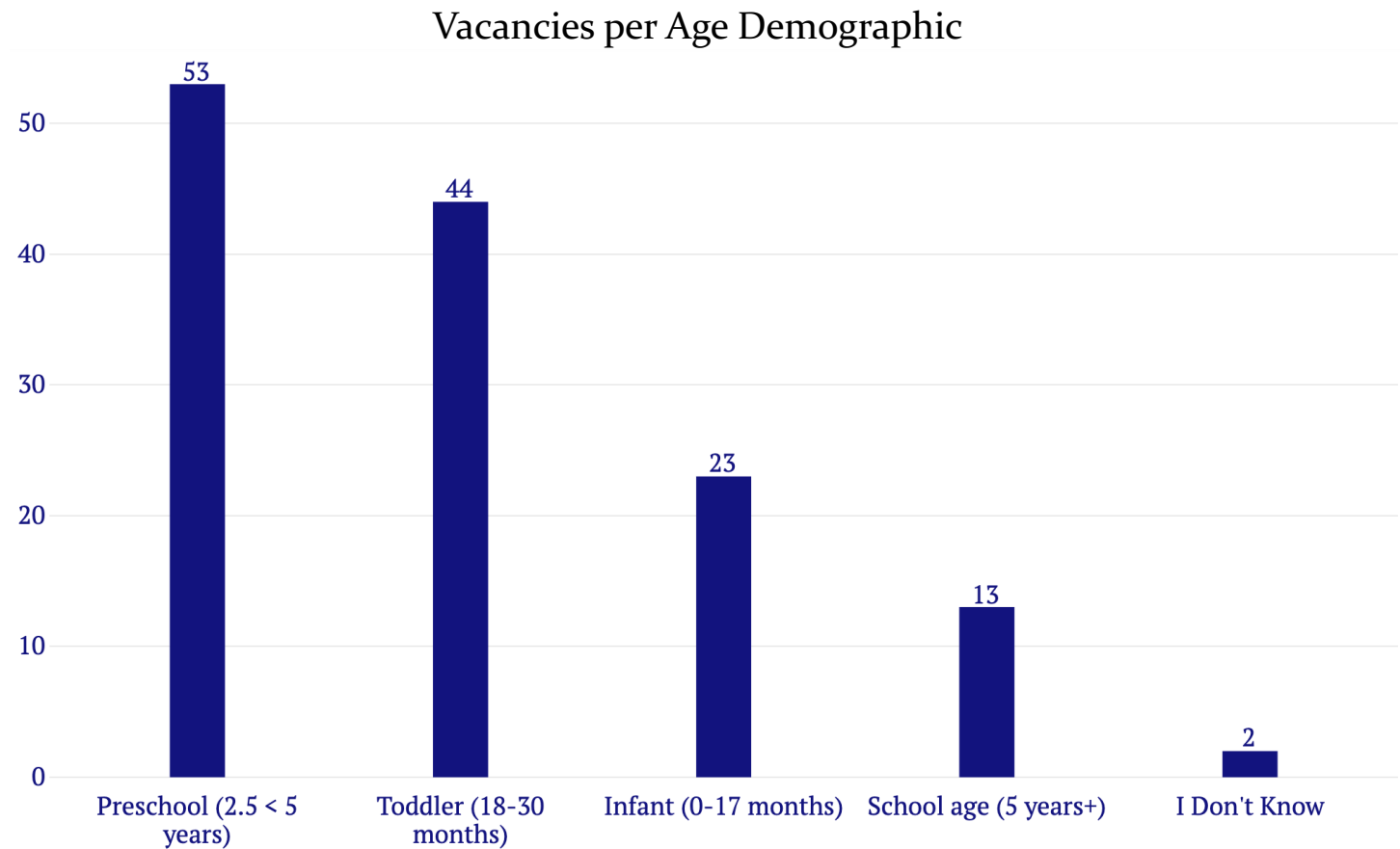
Roughly **67% (67 of 101)** of survey respondents reported having vacancies for child care spaces, while **41% (41 of 101)** reported having waitlists. Several participants in the focus group noted waitlists for infant/toddler care and vacancies for preschool/school-aged children; survey data suggests a waitlists for preschool/school-aged children as well. However, data overall also suggests more vacancies than waitlists across sector.



This question was shown specifically to owners, directors, and administrators. Total number of survey respondents for this question were 41 out of 101.

Survey Findings

Landscape of Sector

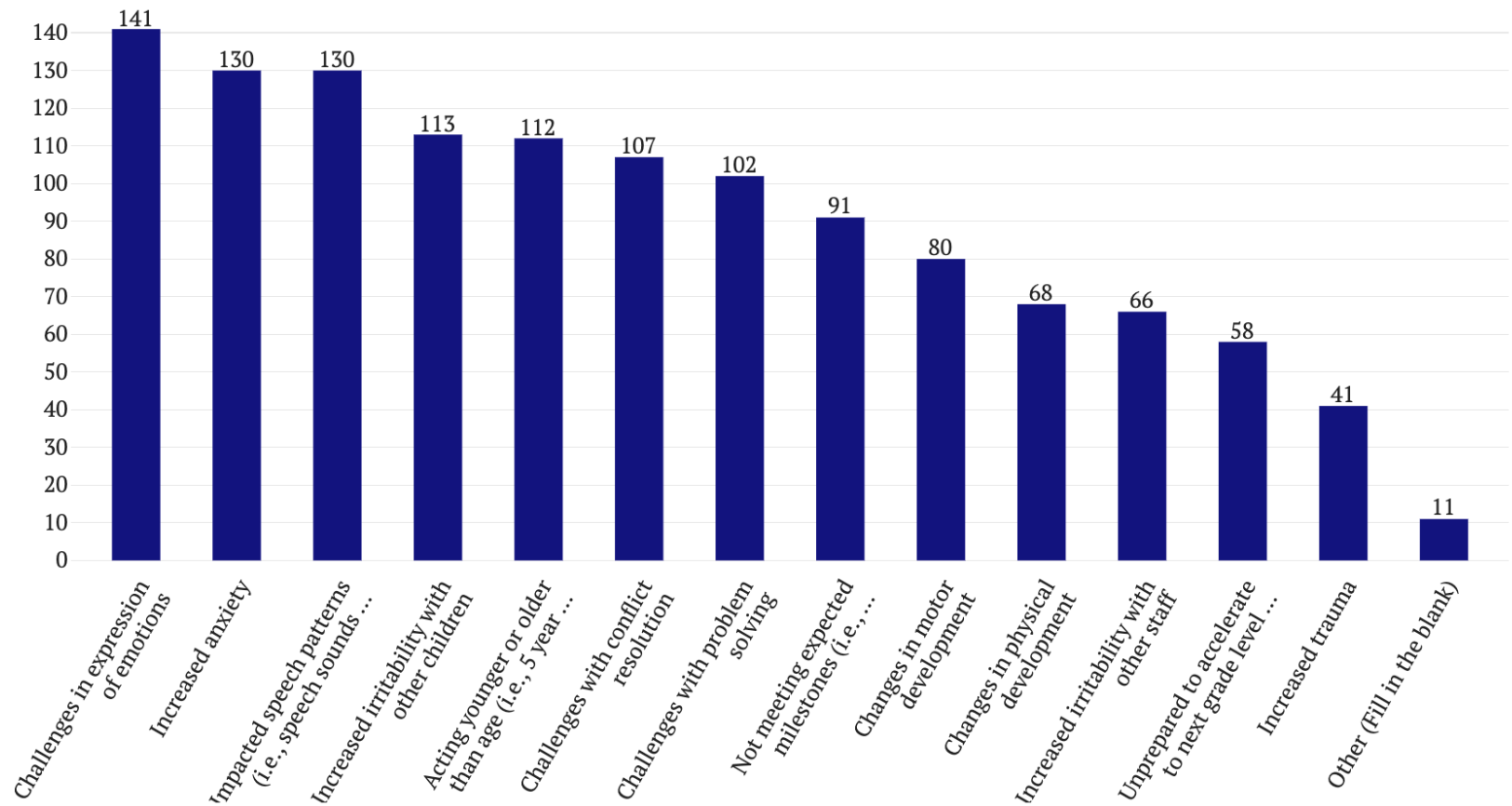


This question was shown specifically to owners, directors, and administrators. Total number of survey respondents to this question were 67 out of 101.

Survey Findings

Changes in Child Behavior

Most workers (**66% or 214/323**) have noticed **changes in child development** as a result of the COVID-19 pandemic. These changes include the following below:



Survey Findings

Suggested Changes for the Sector

Survey respondents shared their suggested changes for the sector, which reflected a request for **more benefits** (e.g., vacation time, higher salaries, mental health support) and **more resources** (e.g., more budget for child care materials, bigger space/house for child care, more staff).



Study Limitations

Study Limitations

Data Collection Limitations

- **Focus Group Limitations**
 - Did not speak with Chinese-speaking child care workers due to resource constraints
 - Focus group for Spanish-speaking child care workers turned into individual interviews because of low responses and timing constraints when scheduling focus group
- **Survey Limitations**
 - Response rate
 - Unclear if survey reached mass population of child care workers in SMC (i.e. unclear if survey data is representative of child care population in SMC)
 - Response rate is estimated between 15-50%; response rate range was determined through the survey outreach list, which included the name of agency and organizational lead and the approximate number of child care workers within the respective agency's network
 - 104 of 323 responses derived from Preschool/Pre-K teachers
 - Outreach
 - Relatively low number of workforce contact information for direct distribution; the survey was mostly distributed via email to agency and organization leads/intermediaries, who were then asked to distribute the survey within their network. San Mateo County was required to protect the privacy of child care workers and could not share emails directly with Seed, in some cases.

Study Limitations

Data Collection Limitations

Duplicate/fraud responses

- Survey received duplicate/fraud responses (approximately 175 responses); may have been incentive driven. Survey was programmed to identify potentially fraudulent/duplicate responses; any identified as such were deleted.

Potential misinterpretation/mis-framing of questions

- For example, in the instance of questions regarding compensation (both hourly and salaried), the response option of "I am not paid an hourly rate" (74 out of 323) and "I am not paid a salary" (13 out of 323) could have been misread or misinterpreted by survey respondents. For example, respondents could have interpreted "I am not paid an hourly rate" to indicate either a lack of financial compensation or that they are salaried workers.
- For question regarding changes to see in sector using ranking options, unclear if respondents navigated the ranking tool easily.

Acknowledgments

Acknowledgments

Thanks & Gratitude

Seed would like to express our gratitude to the following parties for their support, collaboration and guidance in making this project happen:

- The San Mateo County Child Care Partnership Council (CCPC) and Sarah Kinahan as Coordinator of the CCPC
- Brion Economics, Inc. (BEI)
- Child Care Coordinating Council of San Mateo County (known as the 4Cs)
- Child Care Needs Assessment Ad Hoc Committee. Members of the Ad-Hoc Committee include:

Member Name	Affiliation	CCPC Member Category
Elizabeth Foster	ECE Consultant	Child Care Consumer
Heather Cleary	CEO, Peninsula Family Service	Child Care Provider
Christine Thorsteinson	Director, Early Childhood Development, Silicon Valley Community Foundation	Discretionary Appointee
Tal Tamir	Director of Operations, Newton Children's Learning Centers	Child Care Provider
Karen Haas-Foletta	Executive Director, Footsteps Child Care, Inc.	Child Care Provider
Diana Harlick	Coordinator, Early Learning Initiatives & Evaluation, The Big Lift, SMCOE	N/A

Acknowledgments

Thanks & Gratitude

(cont.)

Member Name	Affiliation	CCPC Member Category
Michelle N. Blakely	Deputy Director, First 5 San Mateo County	Public Agency Representative
Heather Hopkins	Owner, Toddler Flexible Playcare	Discretionary Appointee
Elizabeth Scully	Owner, Little Laughs Early Learning Program (FCC)	Child Care Provider
Valerie Higgins	Parent Leader, Parent Voices SMC	Child Care Consumer
David Fleishman	Executive Director, Child Care Coordinating Council	Child Care Provider
Edirle Menezes	Coordinator, Early Learning Quality Improvement, SMCOE	N/A
Karen Pace	Strategic Projects Contractor	Community Representative

Seed would also like to express our thanks and appreciation to the funders of this study:

- San Mateo County Office of Education
- First 5 San Mateo County
- Silicon Valley Community Foundation
- California Department of Social Services

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