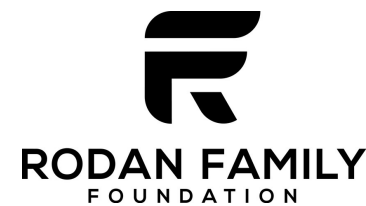


# East Bay Early Childhood Education (ECE)

RESEARCH HIGHLIGHTS

May 2022





# a big vision

For a thriving Jewish ECE  
ecosystem in the East Bay

# what this translates to...



500+ seats



20% market penetration



Reflective of the diversity of community



High quality experience



Increased teacher retention



Expanded hours



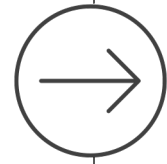
Financially sound



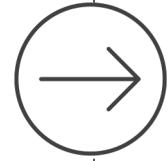
Affordable



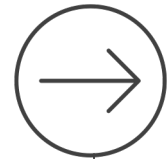
Over \$6.5M  
invested  
since 2017



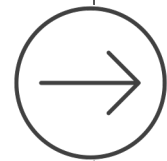
Capacity: \$1.12M in 2021 to 9 preschools to reach more families within existing spaces.



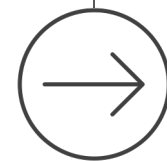
Teacher Training & Retention: 10 educators earning their master's in Jewish ECE at AJU. Year-end bonuses provided to all 160 East Bay educators in 2021 and 2022.



Affordability: Emergency preschool scholarships for over 140 East Bay families.



Relationship-Building: Expand PJ Library Parent Connector program & strengthen bonds across Jewish families.



Research: 2018 East Bay Landscape Scan & 2022 East Bay JECE Inventory.

A group of six children are seated around a light-colored wooden table in a classroom. They are looking towards a blue tray on the table which holds two lit candles in glass holders and a small glass. The children have various expressions of interest and surprise. In the background, there are blue storage cabinets and a sink area with some items on the counter.

**current  
landscape**

# the market

Estimated number of Jewish households with children ages 0-5



8,600

Estimated number of children ages 0-5

10,000



16 Operating Jewish Preschools\*

122 Preschool Teachers

Range of Enrollment: 7-82



548 families

617 children



Total enrollment 2021-2022



6%

Market Reach

# our schools

	Small (4)	Medium (9)	Large (2)
Total Enrollment	51	398	168
Enrollment Per School (Average)	13	44	84
Annual Tuition (Average)	\$10,028*	\$12,343	\$14,665
Annual Tuition (Range)	\$8,531–\$11,489*	\$7,534–\$17,631	\$10,360–\$18,970
County	4 AC / 0 CC	7 AC / 2 CC	1 AC / 1 CC
Total Open Slots	19	87	9
Hours of Operation Per Day (Average)	8.4 hours (5.1)	8.9 hours (5.2)	8.8 hours (5.5)
Number of Teachers Per School (Average)	3	9	18

\*3 of 4 schools represented



key insights



# capacity

## Today's reality

 **64%**  
of schools are **operating below**  
**their licensed capacity.**

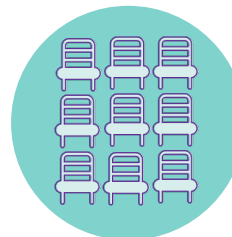


Room for **115** more students  
in East Bay Jewish ECE  
ecosystem.

## The Vision

Collectively we see opportunity for  
more than

 **2x** enrollment

 **500+** new seats

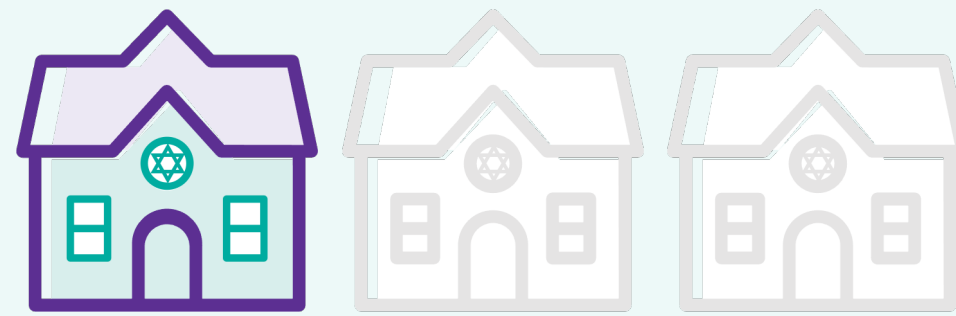
 by **2030**

# families (548)

**25%** of East Bay Jewish households are BIPOC



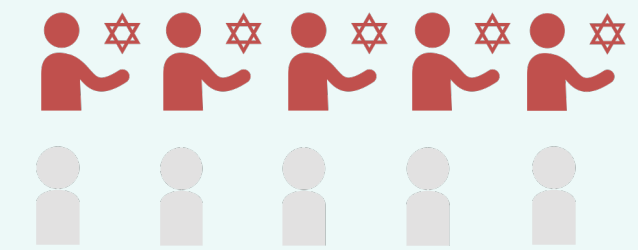
Only **1 in 3** Jewish ECE programs have **25%** that are BIPOC



**57%** of East Bay Jewish households are interfaith



Only **1 in 3** Jewish ECE programs have **half** of the families that are interfaith



**50%** or more of families go on from preschool to other forms of Jewish education or engagement

# educators (122)

## Compensation



**\$26,000-\$51,000**

Annualized FTE Salary Range

## Benefits



**50%**

DO NOT offer health insurance



**6 in 10**

DO NOT offer retirement plans

## Retention



**1 in 5** teachers  
are expected to **leave or retire** in 2023

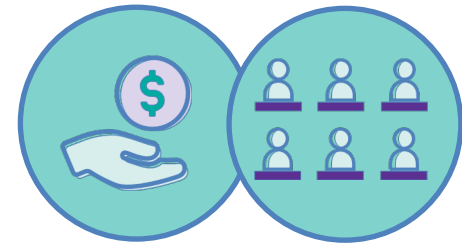


**1 in 3** schools  
report being **understaffed**

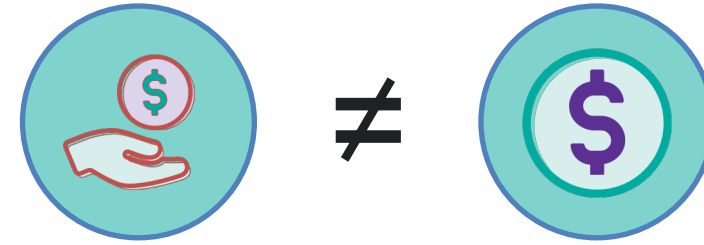


**50%** of schools say it  
takes at least a few **months**  
to **fill a position**

# finances



Schools charging higher tuition **have** higher enrollments and higher per student spending



Schools charging higher tuition **don't have** higher teacher wages, or more scholarship support per student

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**94%**  
of schools provide  
tuition assistance



**22%**  
of families receive  
tuition assistance

A photograph of a classroom where several young children are seated at small wooden tables, eating and drinking. The room has a wooden floor and a bookshelf in the background. The image is semi-transparent, serving as a background for the text.

# strategic levers

An array of potential, interconnected focus areas as we build towards our vision

# ECE is a complex ecosystem



## Reach

Physical capacity/space

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Proximity to families

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Content/approach innovation



## Quality

Educator training/  
professionalization

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Educator compensation



## Affordability

Scholarship models to ensure  
broad access

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Financial models that ensure  
successful schools