

SF East Bay Area 2021-22

Preschool Landscape

Estimated number of Jewish households with children ages 0-5



8,600

Estimated number of children ages 0-5

10,000



Total enrollment 2021-2022

617 children



16 Operating Jewish Preschools*

122 Preschool Teachers

Range of Enrollment: 7-82

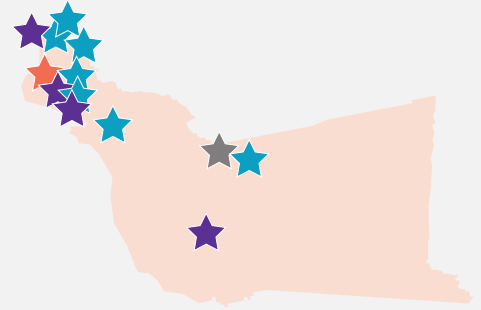
4 Preschools
Contra Costa County

3,800
Jewish Households



12 Preschools
Alameda County

4,800
Jewish Households



★ SMALL ★ MEDIUM ★ LARGE ★ NO INFO PROVIDED ★ NOT OPERATING



6%
Market Reach



Market reach is significantly lower than the national average (20%)

Annualized tuition (based on 35 weeks per year for 4-year-old core programs)



SMALL

Average **\$10,028**

Range **\$8,531-\$11,489**

MEDIUM

Average **\$12,343**

Range **\$7,534-\$17,631**

LARGE

Average **\$14,665**

Range **\$10,360-\$18,970**

*Data presented from 15 out of 16 operating East Bay preschools



Key Takeaways

CAPACITY

64% of programs are operating **below** their licensed **capacity**. Based on a combination of licensed capacity (for most schools) and schools' desired capacity (for a few schools), there is **room for 115 more students** in the East Bay Jewish ECE ecosystem.

The reasons for this are complex, driven in part by the choice to **provide an excellent experience through child-teacher ratios** that are lower than allowed by the state, and in part by market challenges such as **lack of staff, demand, and space**.

Collectively we see opportunity to **more than double enrollment capacity**, adding **500+** preschool spots across the East Bay over the next **5-8** years. Expansion will require **new investments, spaces, and models, alongside an increase in available scholarship funding**.

FAMILIES

Half or more of families **go on to other forms of Jewish engagement for their children** such as Jewish camps, religious schools, and regular family programming at JCCs, synagogues, and other Jewish organizations. **About a quarter** of families send their children to Jewish day schools.

There is **opportunity for greater representation of the diversity** of the East Bay population in our Jewish ECEs. This is especially the case for interfaith families and families of color, both of which are underrepresented in the programs compared to their share of the Jewish population overall. This will require **examining internal practices, policies and marketing approaches** to better serve more diverse families, as well as **prioritizing relationship-building** with and across families for sustaining impact

EDUCATORS

Teacher compensation is insufficient. Salaries are low; annualized salaries range from just **\$26,000-\$51,000** for salaried/exempt teachers. The average salary in the San Francisco Bay Area overall are approximately **\$70,000- \$75,000.**¹

Benefits are limited. Only **half** of all programs offer health insurance to full-time teachers and only **a third** offer it to part-time teachers. In addition, only **four-in-ten** programs offer retirement plans to full-time teachers, and just **a quarter** offer them to part-time teachers.

Teacher retention is challenging. **One-in-five** teachers is expected to leave or retire from their positions in the next year. Roughly **half** the programs report it is taking a several months to fill teaching positions. About **a third** of programs report they are understaffed. We have a **critical need to improve the teacher pipeline and retention**.

FINANCES

Data show a **correlation between tuition and enrollment**—schools charging higher tuition have higher enrollment and higher per student spending. However, **higher tuition is not necessarily correlated with higher teacher wages**, or more scholarship support per student.

Nearly all programs (**94%**) report they **provide tuition assistance**, but only **135 children (22%)** received this support, and little is understood about the impact. Average tuition assistance for those who receive it ranges from **\$1,500 to \$5,700**.

On average, **80%** revenue is being reinvested back into the ECE program. **20%** is going back to the host organization.

¹ San Francisco; Oakland; Berkeley; San Jose

Our East Bay Preschools

Thank you to all the schools that participated.

School	Host Organization	Location	Size
Beth El Nursery School (BENS)	Congregation Beth El	Alameda	Medium
Beth Emek Preschool	Congregation Beth Emek	Alameda	Medium
Beth Sholom Preschool	Temple Beth Sholom	Alameda	Medium
Gan Avraham Preschool	Temple Beth Abraham	Alameda	Medium
Gan B'nai Shalom Preschool	B'nai Shalom	Contra Costa	Medium
Gan Ilan Preschool	Temple Isaiah	Contra Costa	Large
Gan Mah Tov Preschool	Beth Jacob Congregation	Alameda	Medium
Gan Sameach Preschool	Temple Beth Torah	Alameda	Small
Gan Shalom Preschool	Congregation Beth Israel	Alameda	Medium
Gan Yiladim Preschool	Chabad of Contra Costra	Contra Costa	Medium
Gani Jewish Preschool	Chabad of Oakland	Alameda	Small
JCC East Bay Preschool	JCC East Bay	Alameda	Medium
Netivot Shalom Preschool	Netivot Shalom	Alameda	Small
Temple Sinai David Pregonson Preschool	Temple Sinai	Alameda	Large
The Gan - Alameda Jewish Preschool	Chabad of Alameda	Alameda	Small
Tree of Life Learning Center	Beth Chaim Congregation	Contra Costa	No info provided
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Gan Chabad Preschool	Chabad of the Tri-Valley	Alameda	Not operating
Ganeinu	Chabad of El Cerrito	Contra Costa	Not operating