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Exploring the Jewish ECE Ecosystem in the San Francisco Bay Area

Regional Presentations

January 2024



EarlyJ

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Learning Goals



Geography: Where are Jewish ECE programs located?

- How does the geographic distribution of Jewish families align with the location of current centers?
- Are some areas over- or under-served by existing programs?



Profiles of ECE Programs: What are the centers' current operational and financial metrics?

- How has enrollment trended over time?
- What are the characteristics of families the ECE programs serve?
- What are the ranges in staff salaries and benefits?



Pathways and Barriers to Enrollment: What attracts families to Jewish ECE programs and what keeps other families from enrolling their children in them?



Methods



We constructed a series of **multi-layered maps** to visualize the location of ECE programs, the populations that are likely to use them, and other information.



We carried out organizational and programmatic **inventories** of 43/48 ECE programs Bay Area-wide.



We conducted 25 **interviews** with parents of young children.

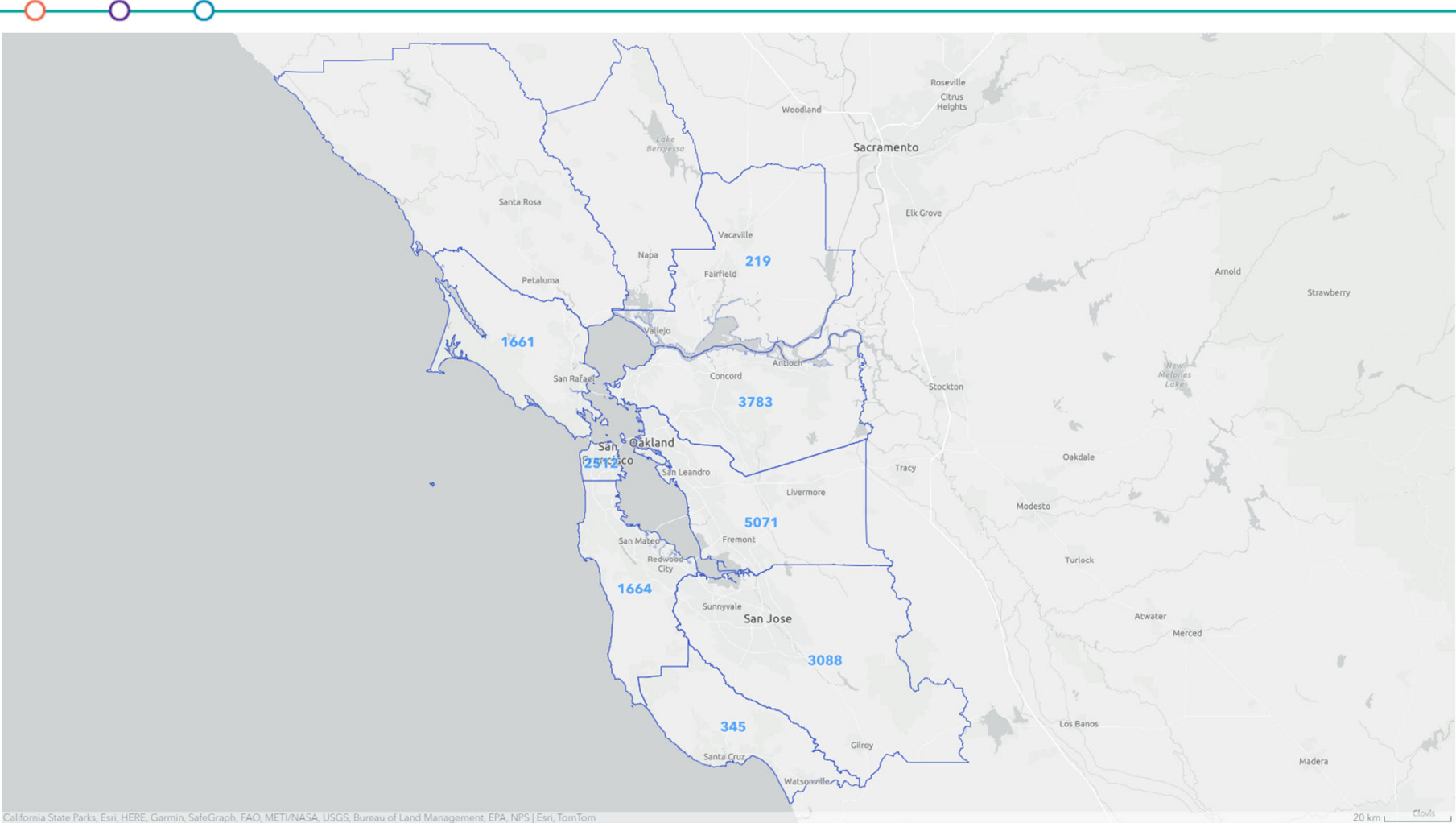
- ✓ 8 parents of children **currently enrolled** in a Jewish ECE program
- ✓ 7 parents of children **recently graduated** from a Jewish ECE program
- ✓ 4 parents who **enrolled but then left** a Jewish ECE program
- ✓ 6 parents who **considered but did not enroll** child in a Jewish ECE program



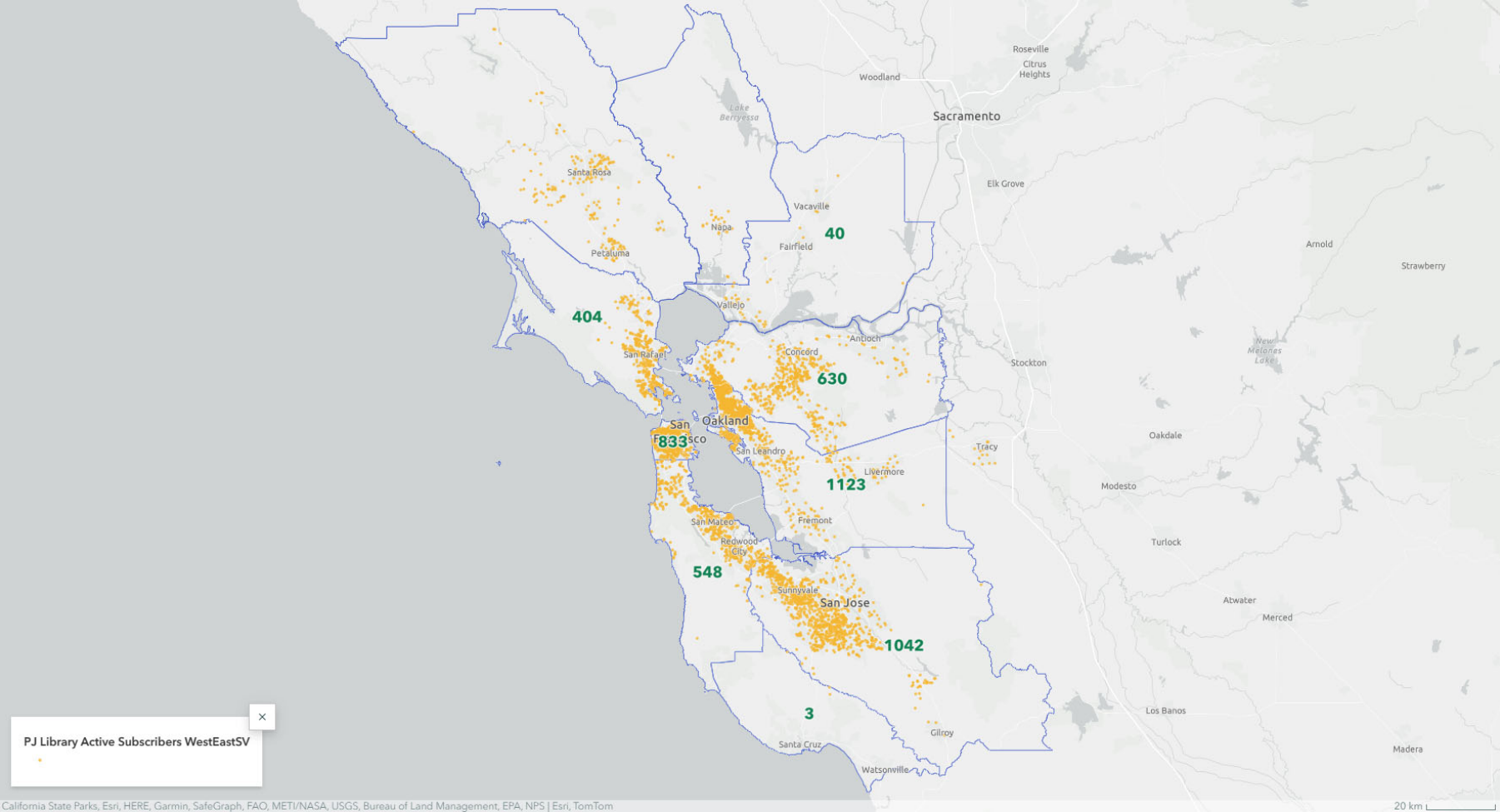


Geography

Families with Children Under 5 By County

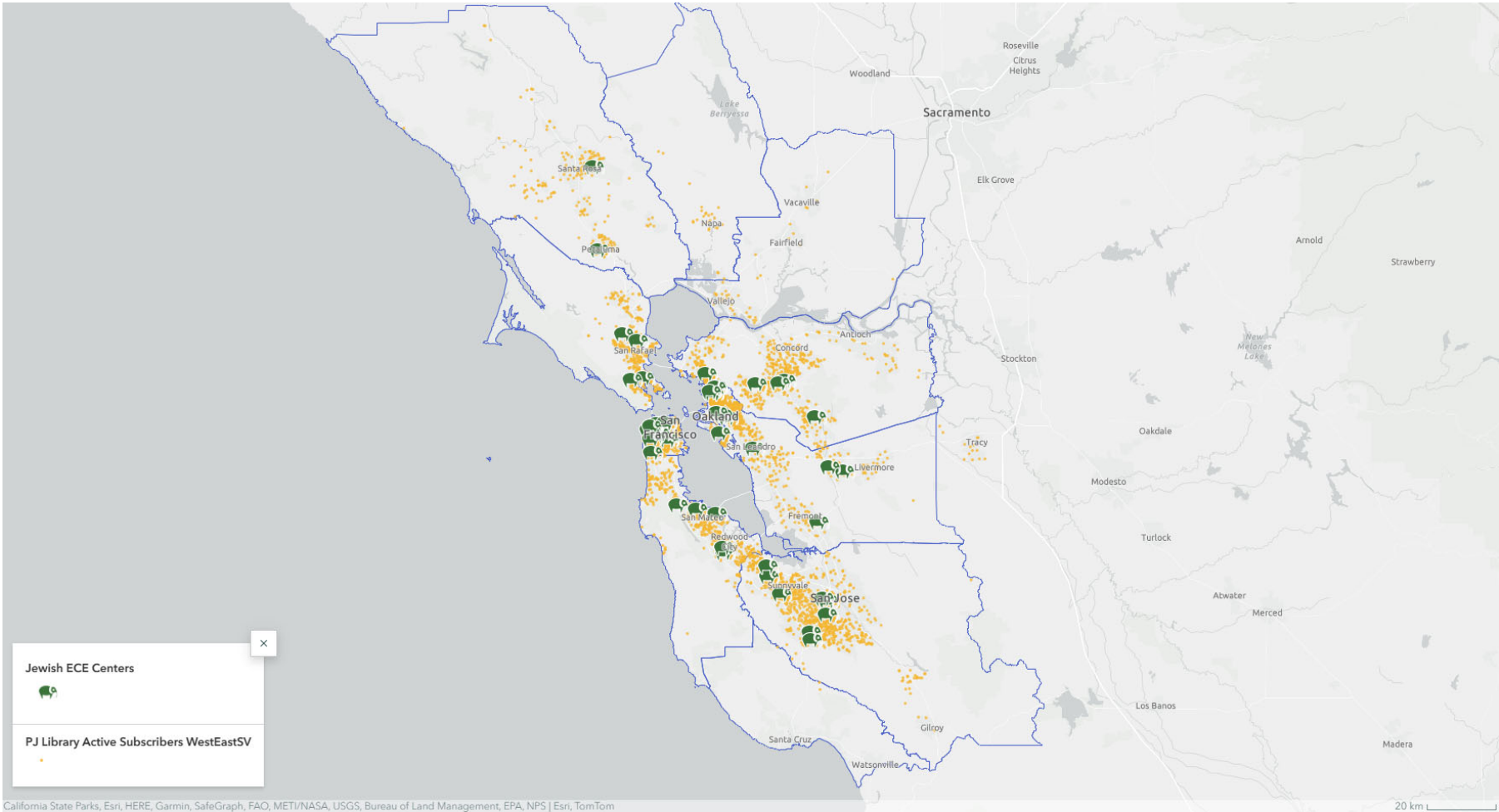


PJ Library Subscribers: Numbers and Density by County

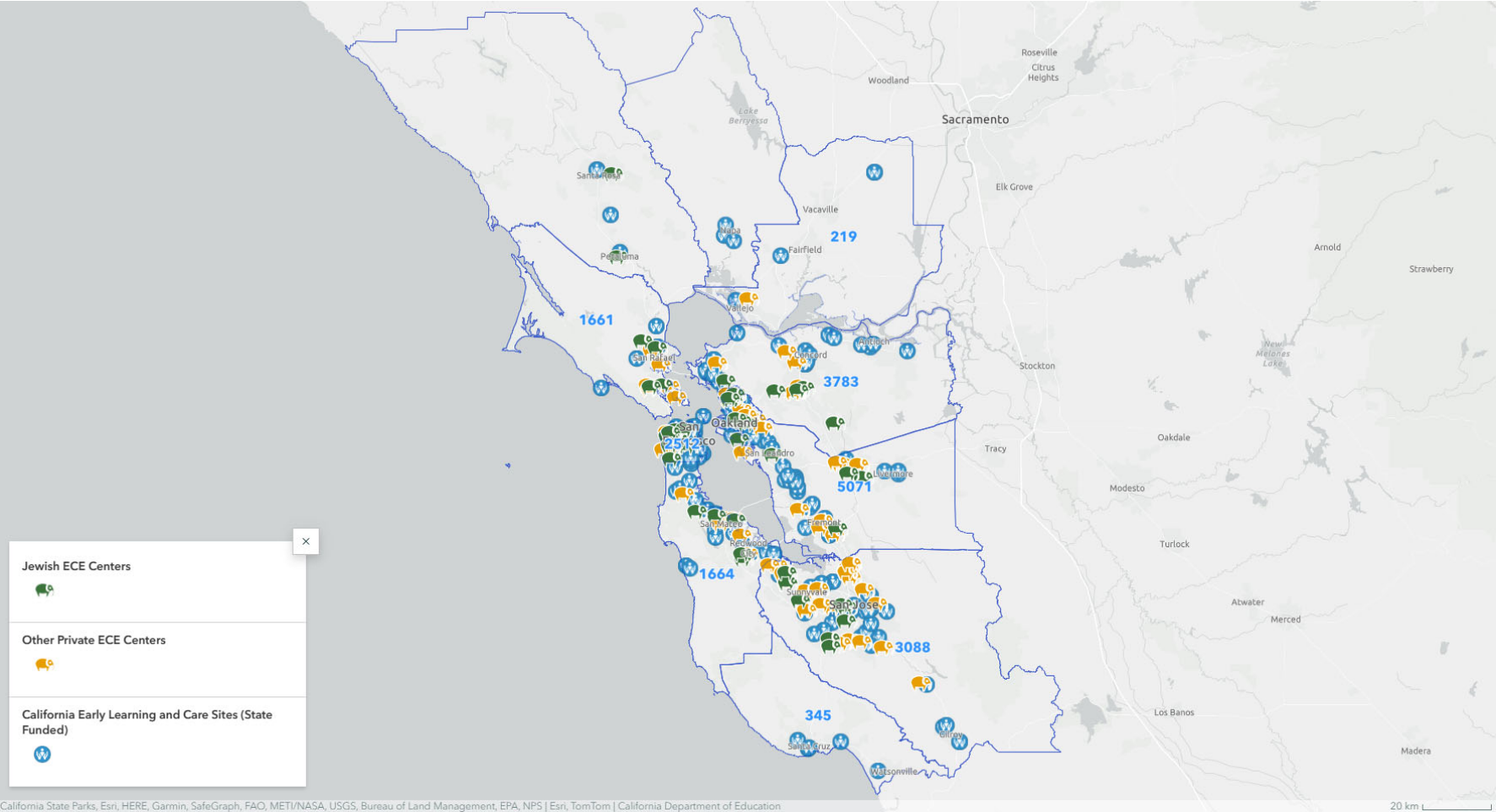


California State Parks, Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, Bureau of Land Management, EPA, NPS | Esri, TomTom

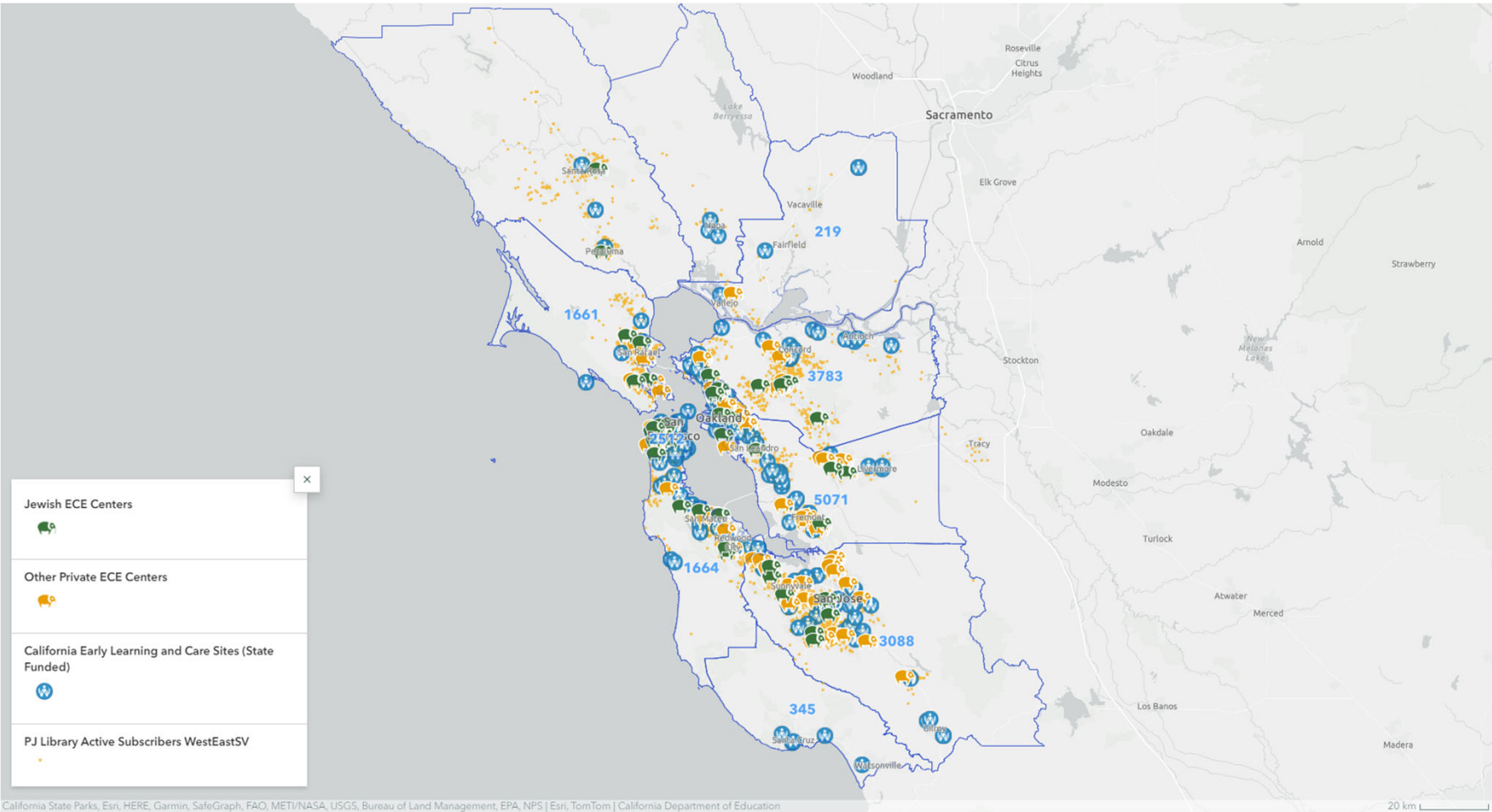
Location of Jewish ECE Programs and PJ Library Subscribers



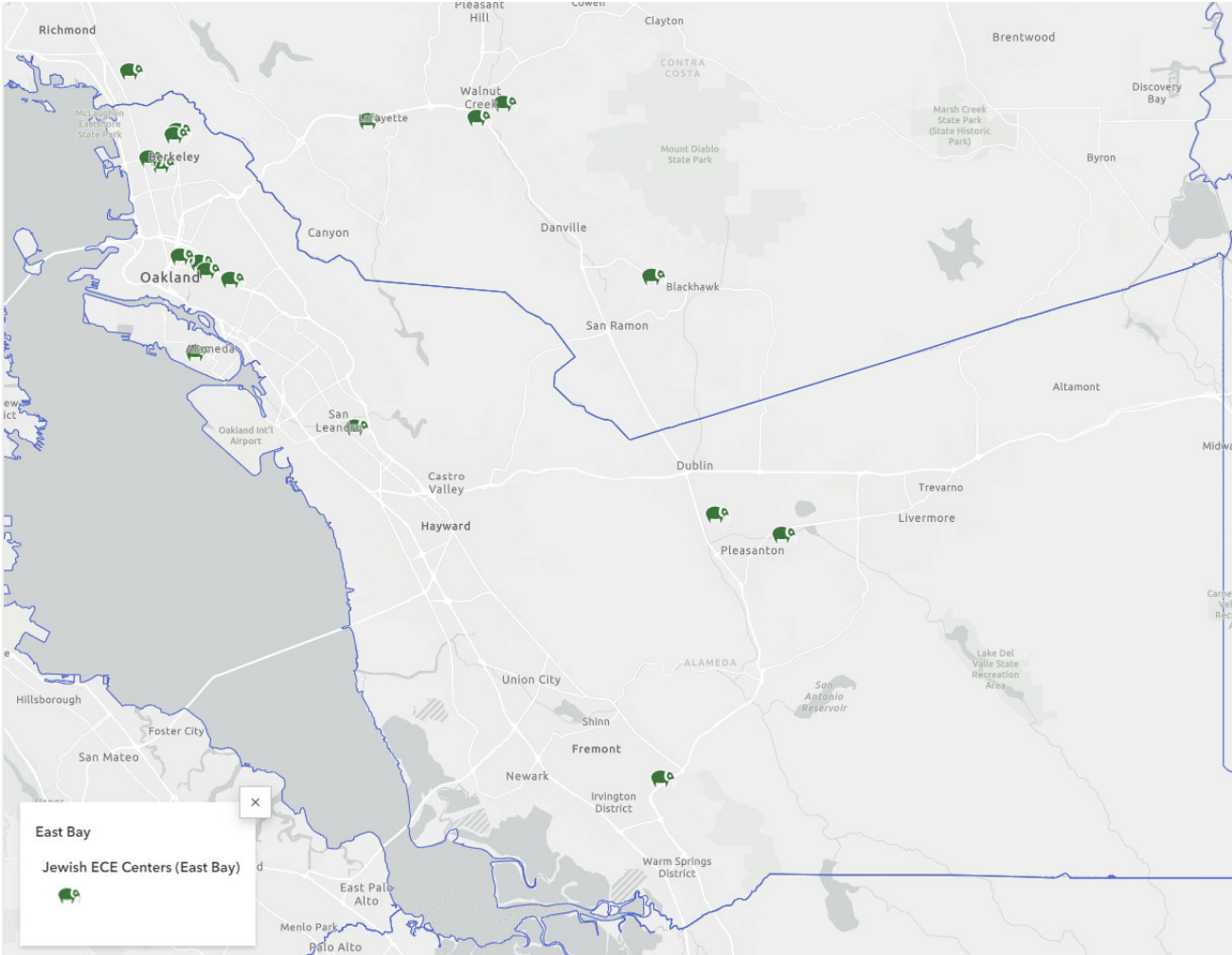
Potential Competition: Other Private and State Funded ECE Programs



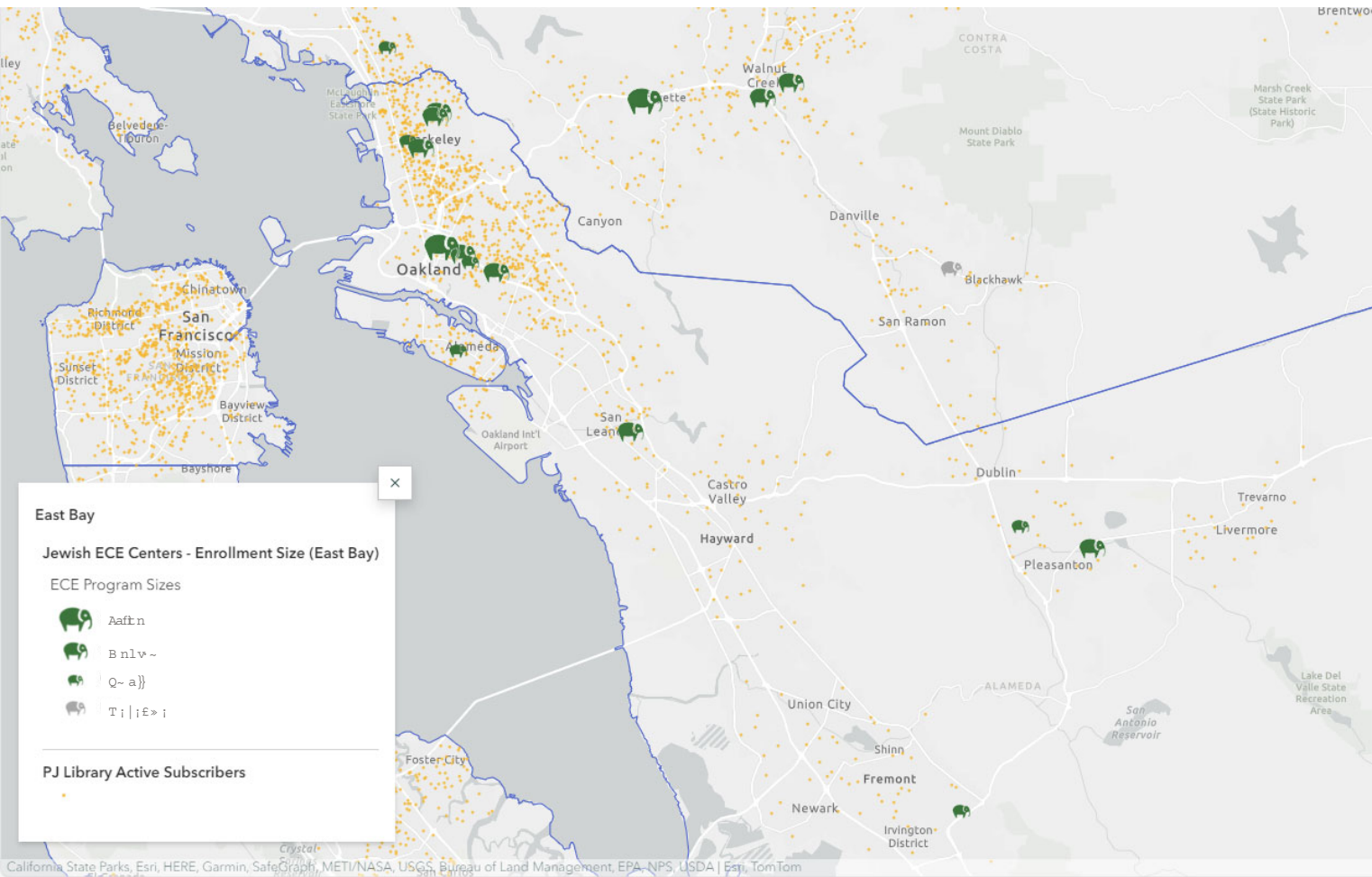
Potential Competition: Other Private and State Funded ECE Programs (w/PJ Library)



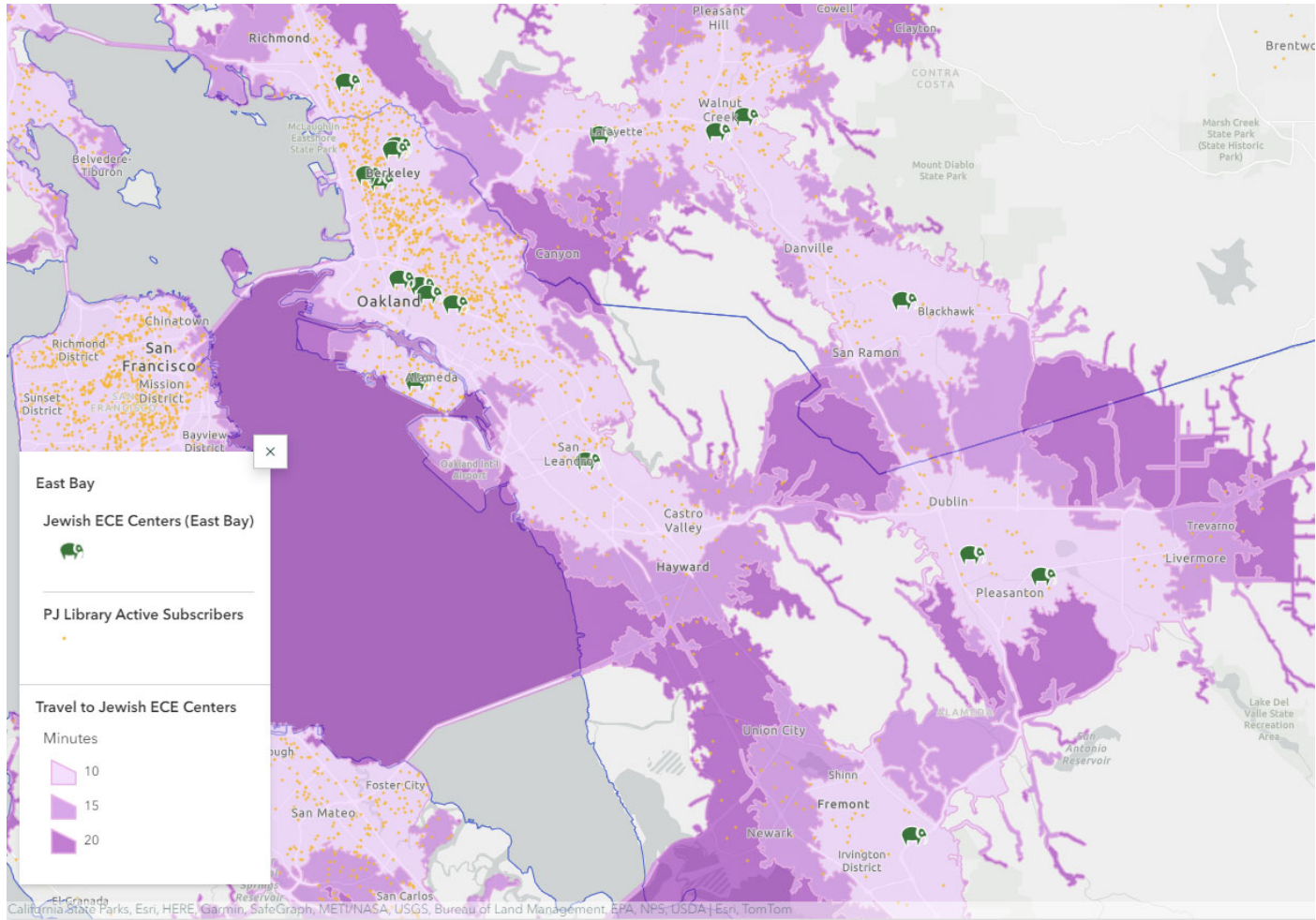
Location of Jewish ECE Programs – East Bay Only



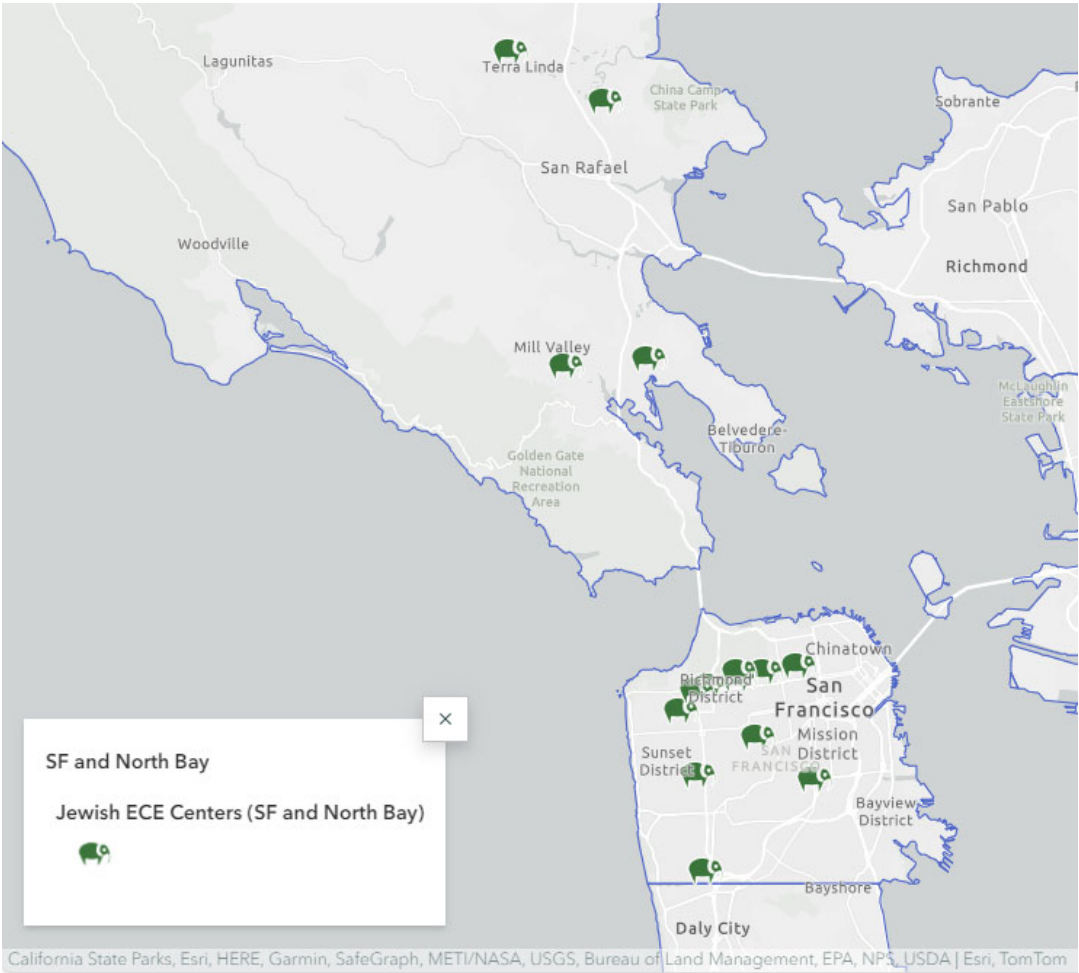
Location of Jewish ECE Programs and PJ Library Subscribers - East Bay Only



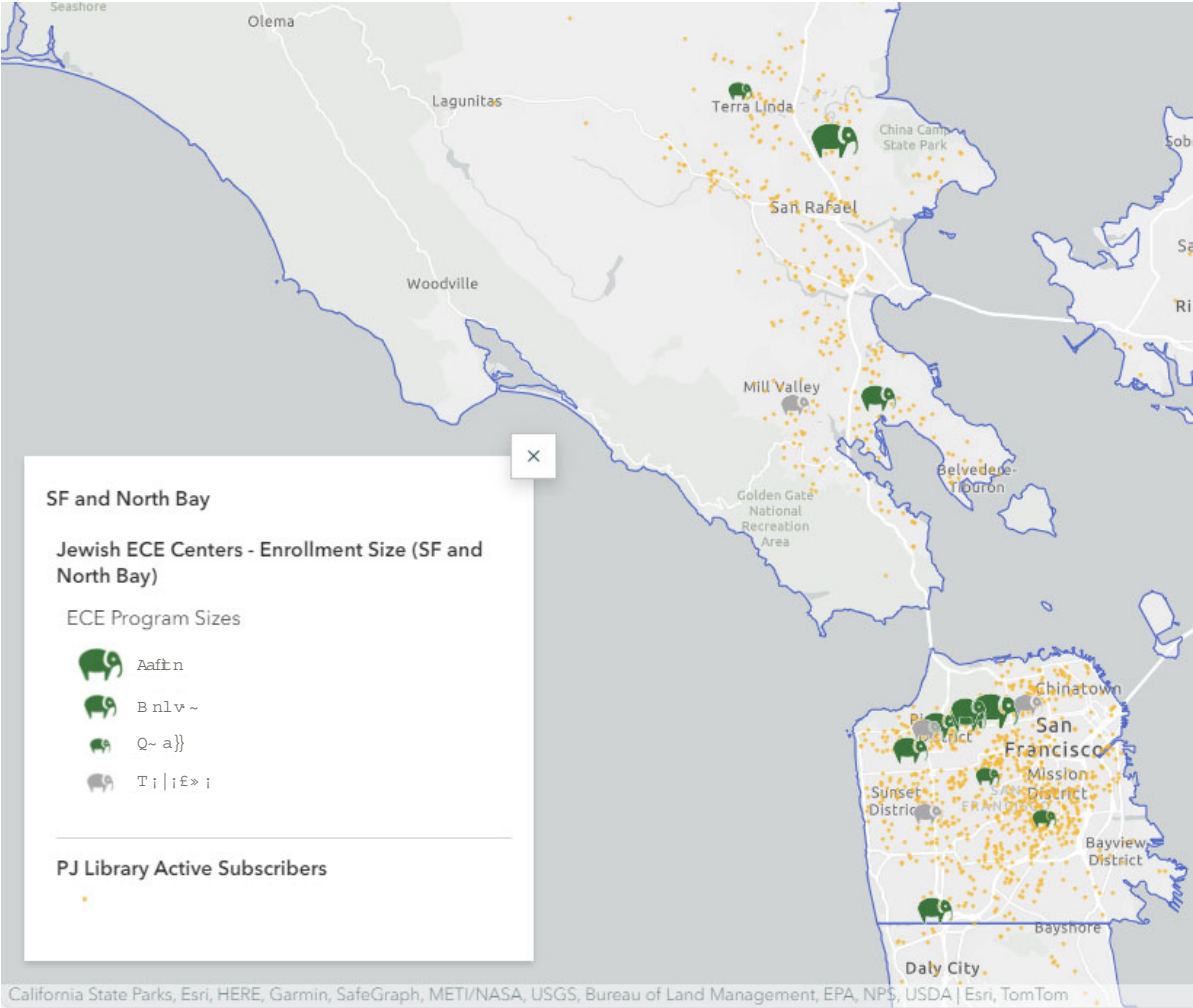
Location of Jewish ECE Programs, PJ Library Subscribers, and Drive Times - East Bay Only



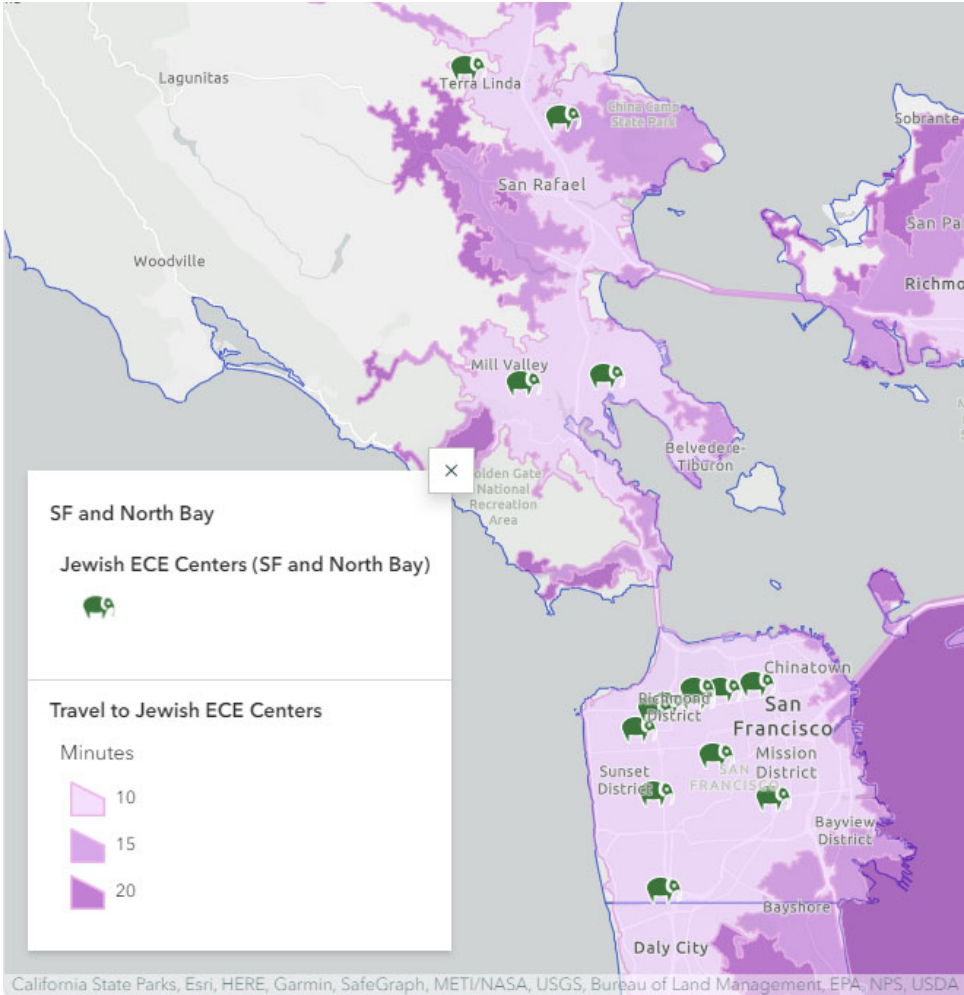
Location of Jewish ECE Programs – SF and Marin Only



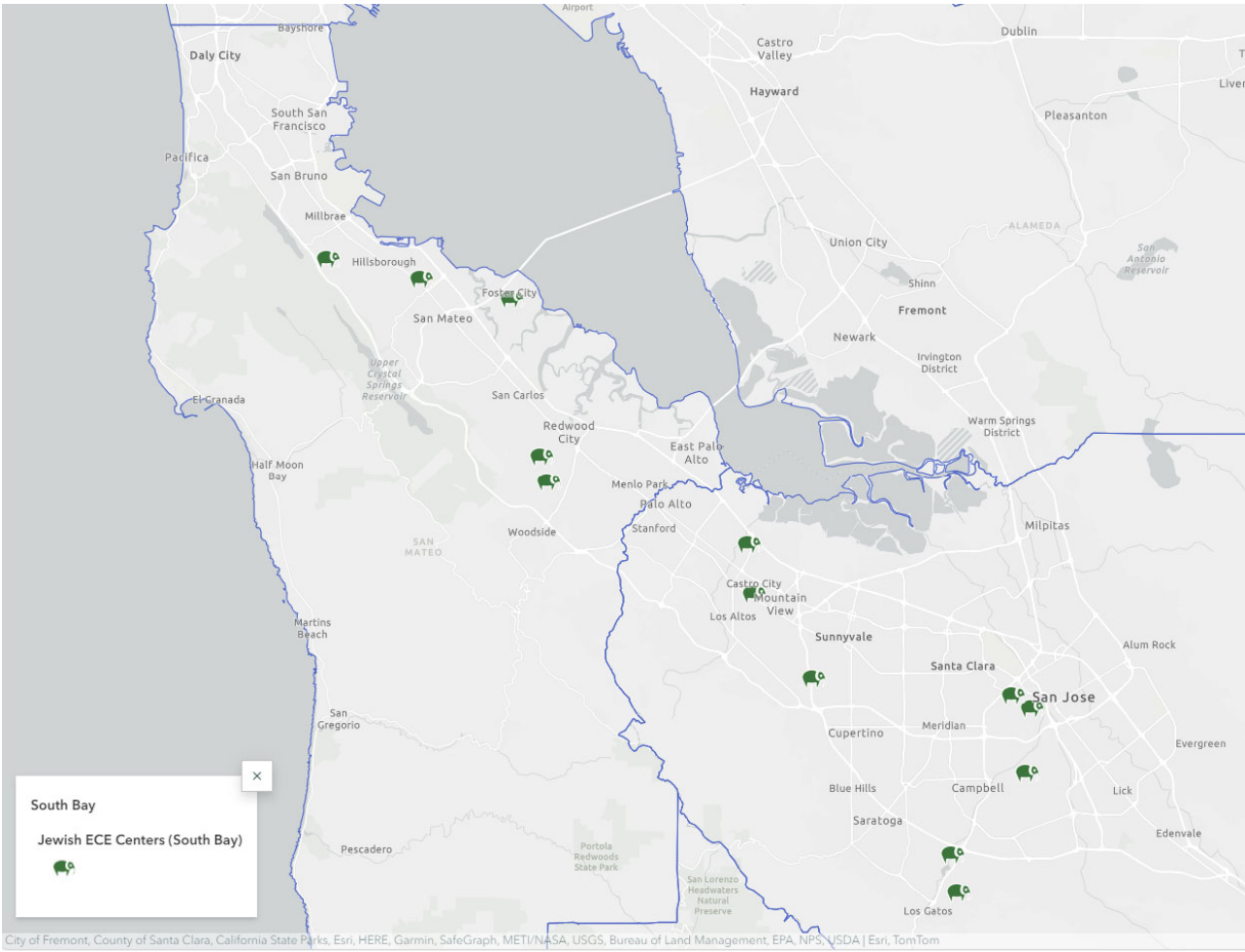
Location of Jewish ECE Programs and PJ Library Subscribers - SF and Marin Only



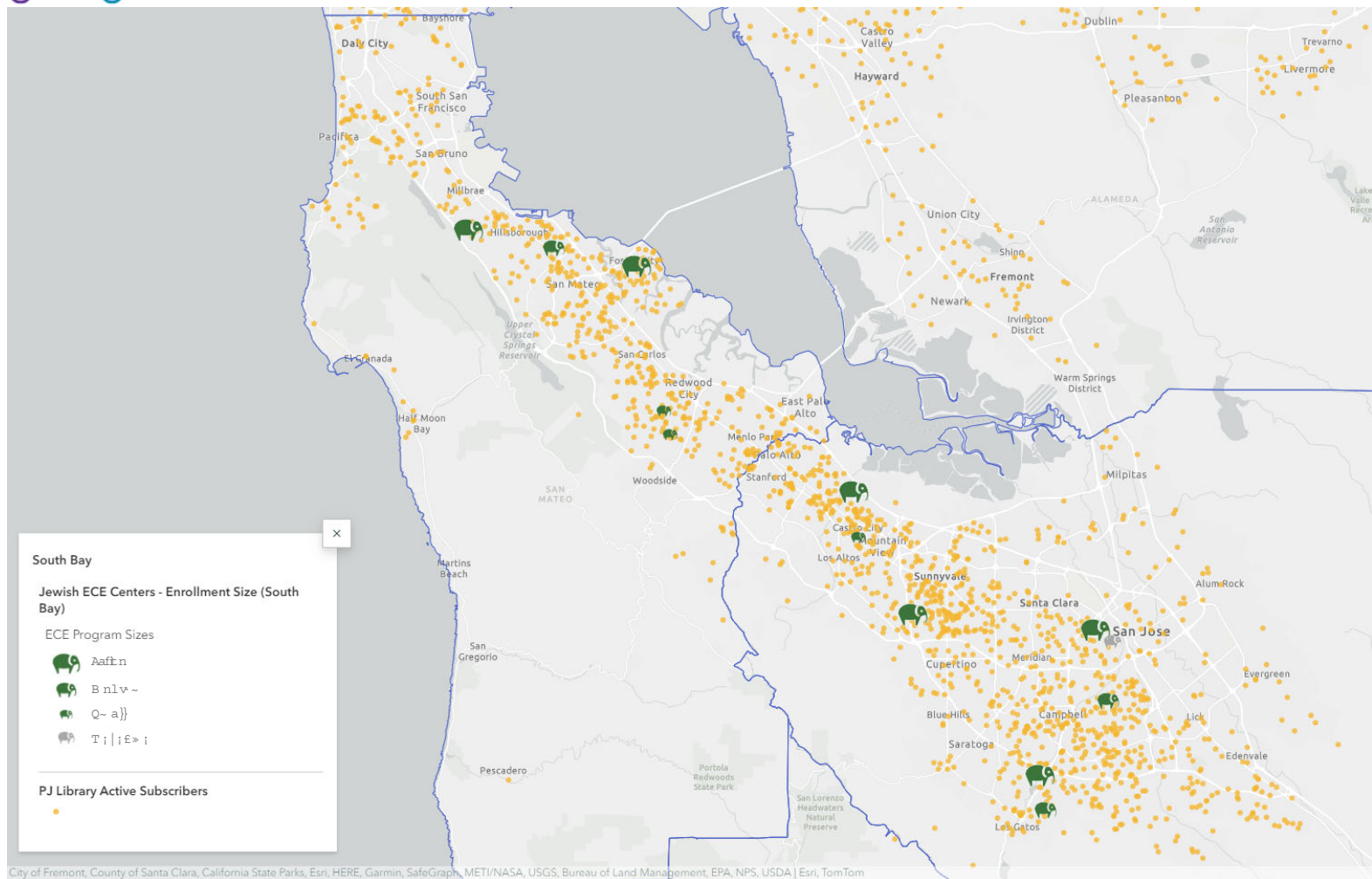
Location of Jewish ECE Programs, PJ Library Subscribers, and Drive Times - SF and Marin



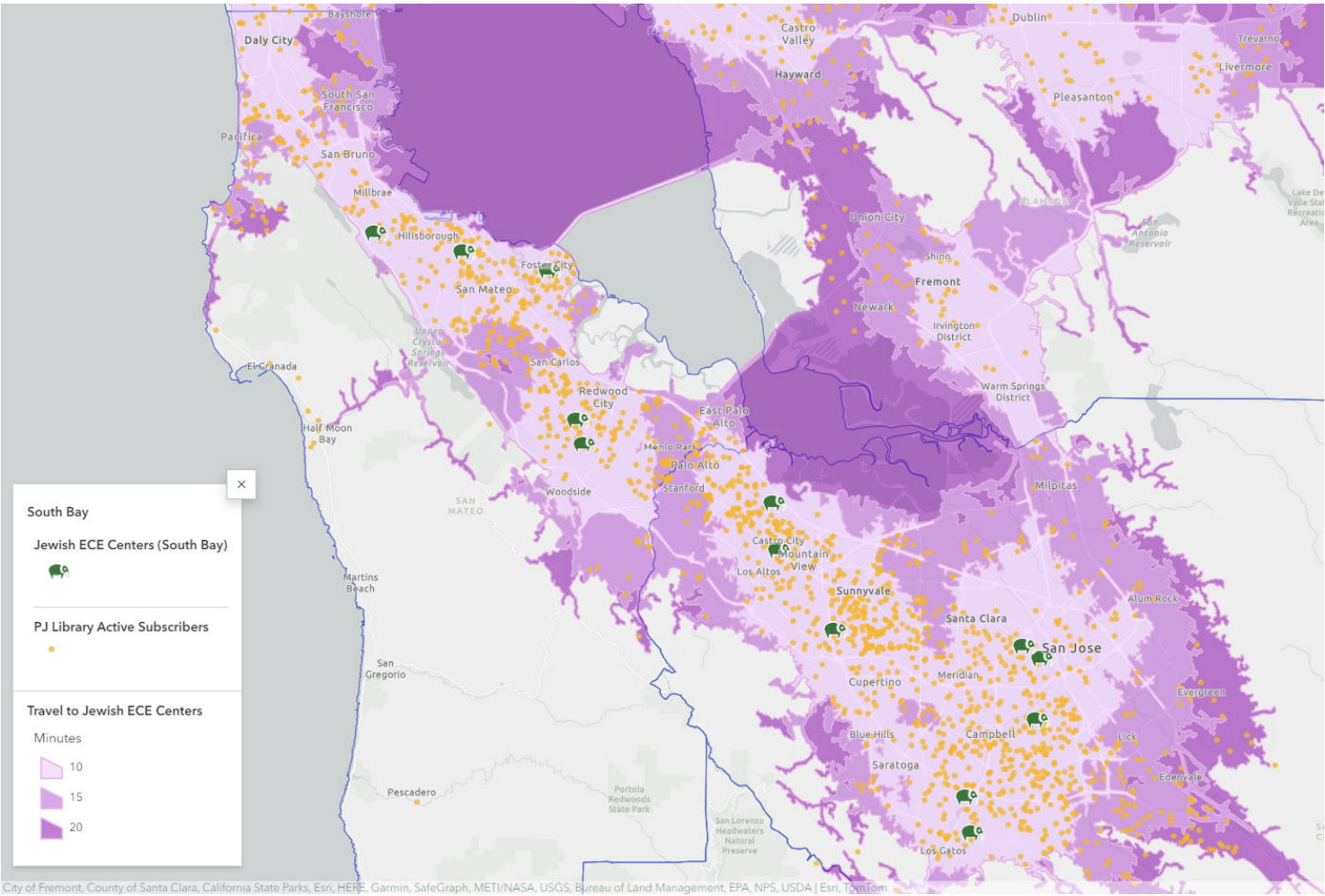
Location of Jewish ECE Programs – Peninsula and South Bay Only



Location of Jewish ECE Programs and PJ Library Subscribers - Peninsula and South Bay Only

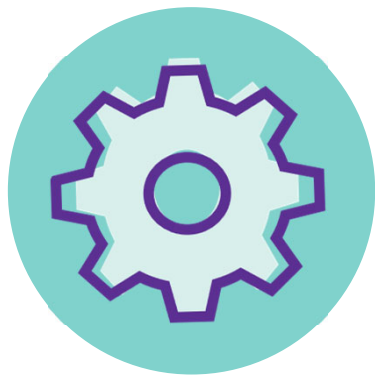


Location of Jewish ECE Programs, PJ Library Subscribers, and Drive Times - Peninsula and South Bay Only





Program Profiles



General Program Information

- Many of the programs are long-standing, with **over half in existence for more than 20 years.**
- Most are a **part of a host organization** and not stand-alone ECE programs.
- Enrollments range from **7 to 190.**
- 2/3 to 3/4** operating below legal capacity.

Small



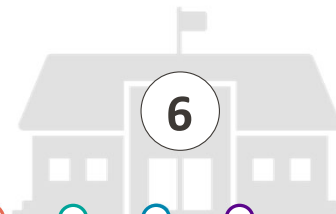
Medium



Large



Unknown





Program Schedule

- On average, ECE programs offer **6 hours of care as their core offering**, with options ranging up to 11 hours of care in a day.
- ECE programs are open for an average of **46 weeks per year**.
- Over **four in ten ECE programs (43%) decreased their hours of care** due to the pandemic.
- ECE programs are closed for an average of **12 days per year for Jewish holidays**.





Operating Costs

- Operating budgets in 2022–2023 range from \$120,000 to \$4.3 million, with a median of \$1.35 million per program.
- On average, 82% of budgets are funded by tuition.
- Average education investment per student in 2022–2023 is over \$22,000, ranging from \$5,400 to \$40,000.



Tuition

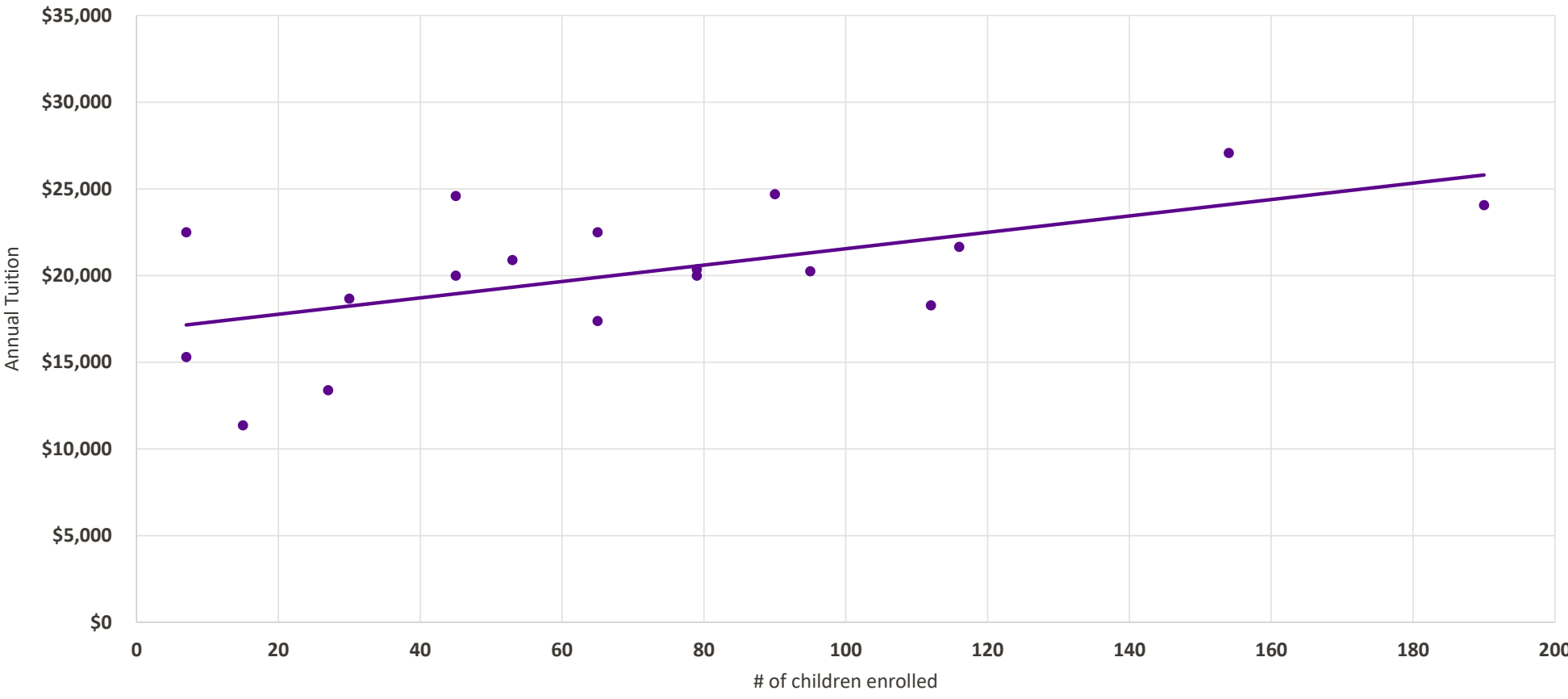


Annual tuition is calculated based on core fees for 4-year-olds and 46 weeks of care per year.

Annual Tuition for 4-Year-Old



2022–2023 - Total Enrollment and Annual Tuition

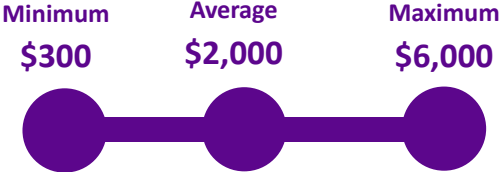


n=18

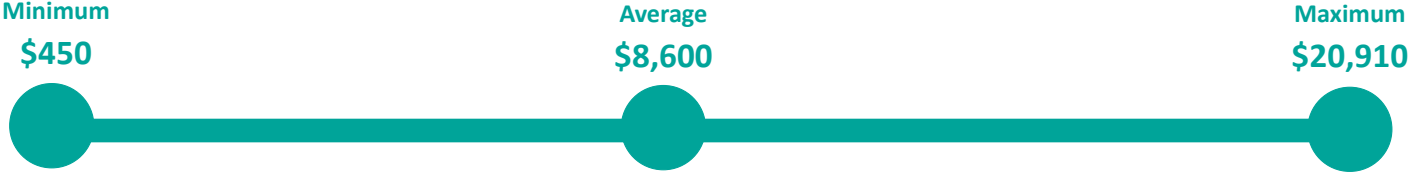
Tuition Assistance in 2021–2022



Lowest amount of tuition assistance offered for one child
(n=30)



Highest amount of tuition assistance offered for one child
(n=30)



Tuition Assistance Provided 2021–2022

- one out of every five of all families apply for tuition assistance.
- 93% of all families that applied for tuition assistance were awarded tuition assistance (99% of Jewish families and 87% of non-Jewish families).

Sources of tuition assistance	% of total \$	# of schools that receive funding from this source	Total \$
Program fundraising	36%	16	\$630,895
Federation	26%	19	\$446,829
Host organization allocation	17%	8	\$294,323
Tuition paid by other families	12%	5	\$211,979
Private grants	5%	6	\$78,757
Local government grants	4%	1	\$71,040
Total	100%	N/A	\$1,733,823



The Teachers





Staffing, Credentials, and Training

40 ECE programs report 455 teachers in total.

Nearly seven in ten (68%) of the ECE programs have a person on staff who is specifically responsible for Jewish education, enrichment, or curriculum development.

63% of teachers have 3 or more years of experience in Jewish education or have coursework in Jewish education.

18/25 programs organize professional development opportunities in Jewish education and other topics every year for teachers.



Teacher Salaries and Benefits

- Average hourly wages for teachers range from \$22–\$30
- FTE annual salaries (based on 35 hours per week) range from \$40,040 to \$54,600
- About 3/4 of the ECE program staff are full-time staff, 1/4 are part-time staff

		Percent
Paid vacation	Full-time	88%
	Part-time	60%
Paid sick leave	Full-time	95%
	Part-time	73%
Paid family leave	Full-time	48%
	Part-time	35%
Health insurance	Full-time	70%
	Part-time	35%
Dental insurance	Full-time	65%
	Part-time	38%
Vision insurance	Full-time	58%
	Part-time	33%
Life insurance	Full-time	40%
	Part-time	30%
Short- or long-term disability	Full-time	40%
	Part-time	30%
Retirement plan (401(k), 403(b), etc.)	Full-time	55%
	Part-time	35%



Staffing Challenges & Teacher Attrition

- **38%** of programs report being **understaffed**.
- On average, ECE programs expect to **lose 2 teachers** per year for reasons other than retirement.
- Most commonly, teachers **leave the workforce** after leaving the Jewish ECE programs.

n=40





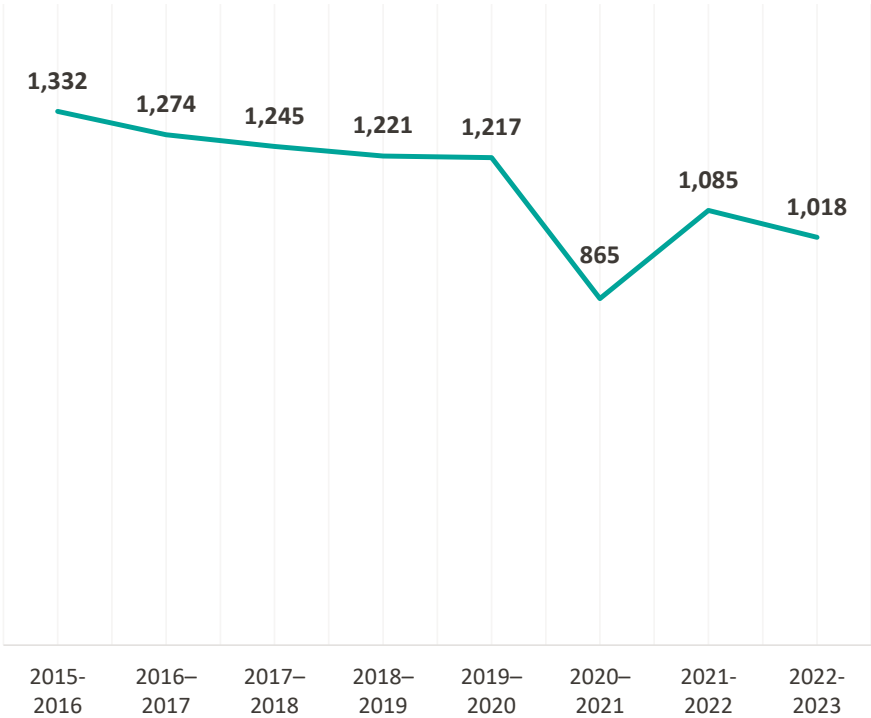
The Students



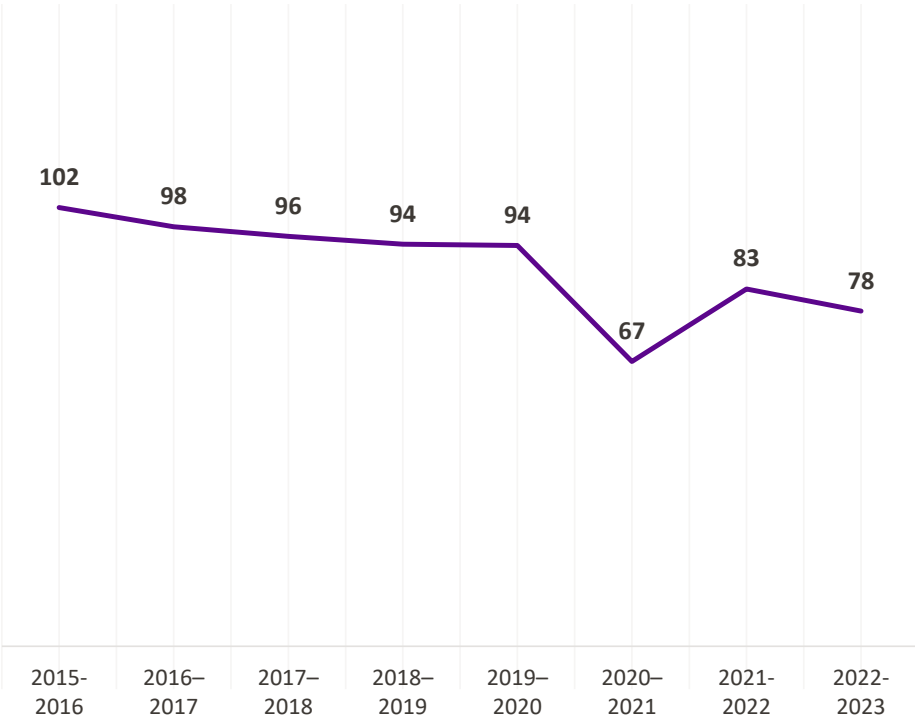
Enrollments Over Time (consistent reporting year over year)



Total Enrollment in ECE Program by Year



Average Enrollment in ECE Program by Year



Enrollments in 2022–2023



Total Enrollments by Age Group





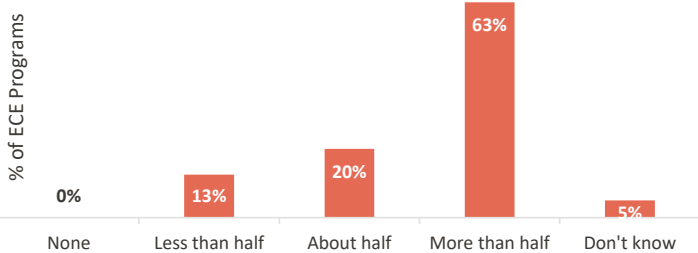
The Families



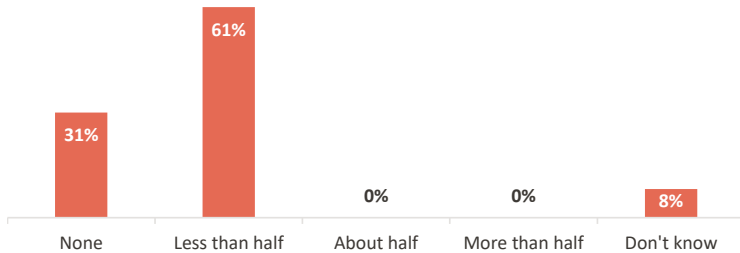
Families Served



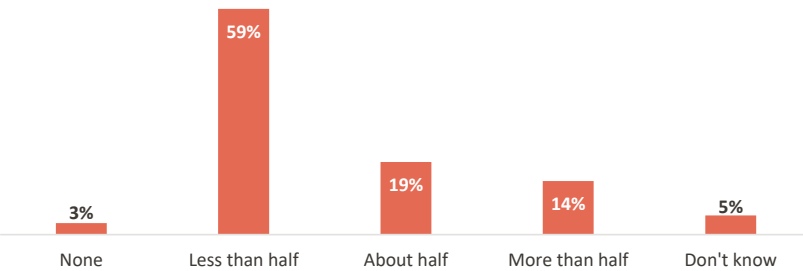
Families that are Jewish



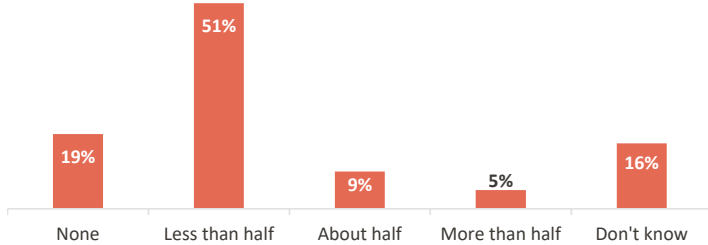
Families With at Least One Parent/Guardian Who Identifies as LGBTQ+



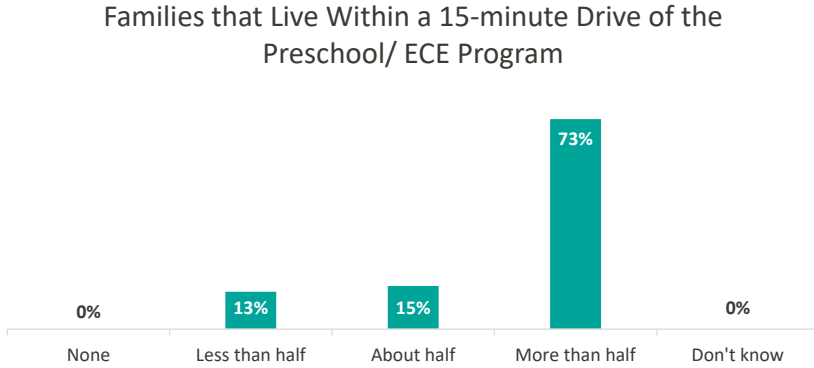
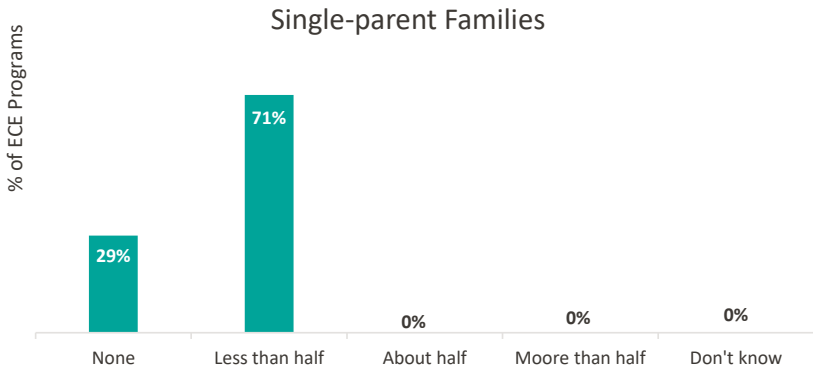
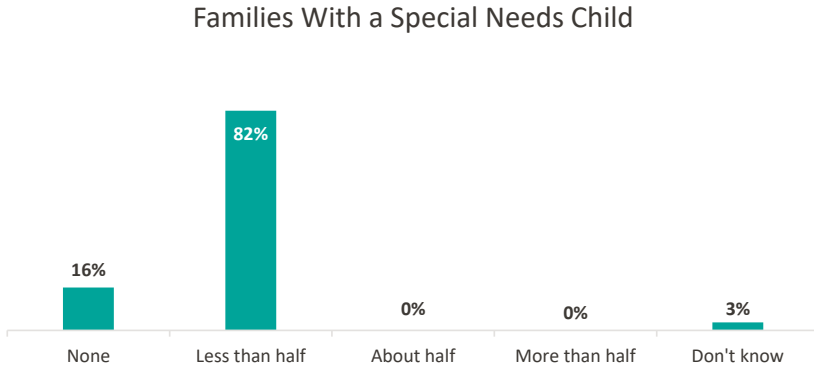
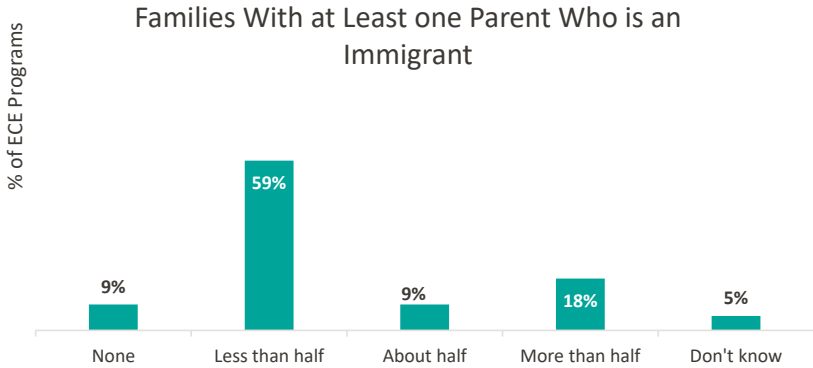
Interfaith families



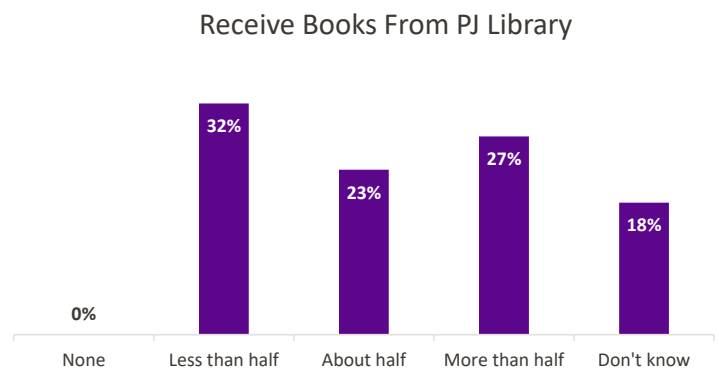
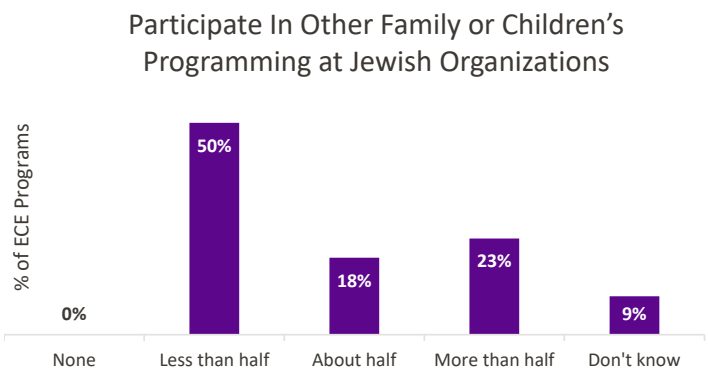
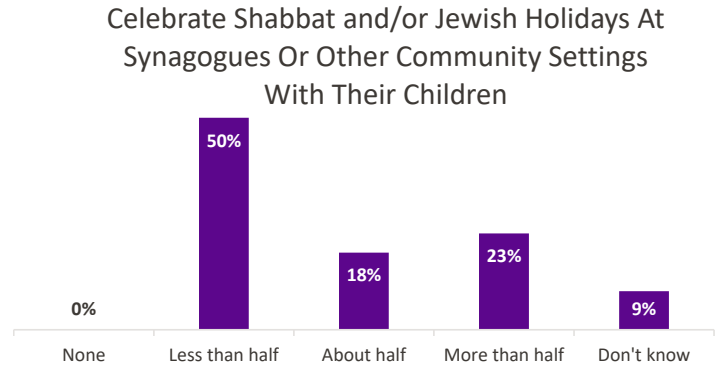
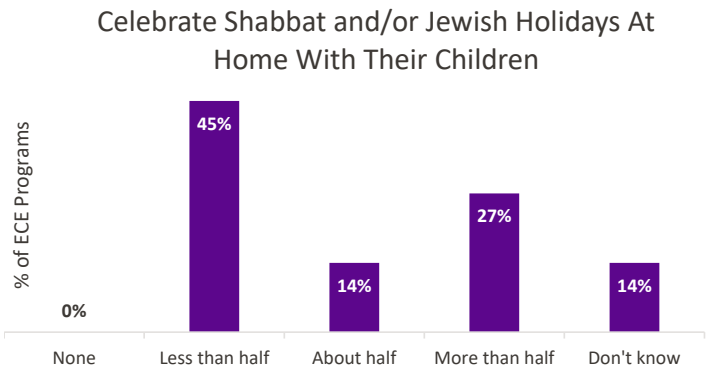
Families with at Least one Parent/Guardian Who Identifies as a Person of Color



Families Served



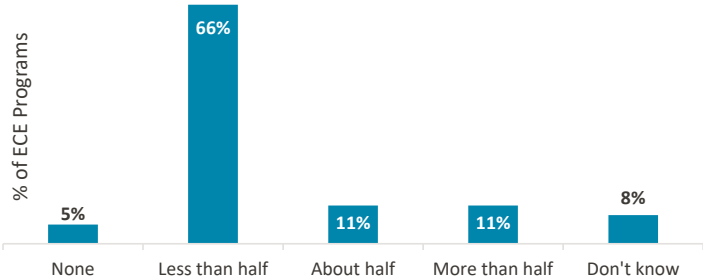
Currently Enrolled: Family Jewish Engagement



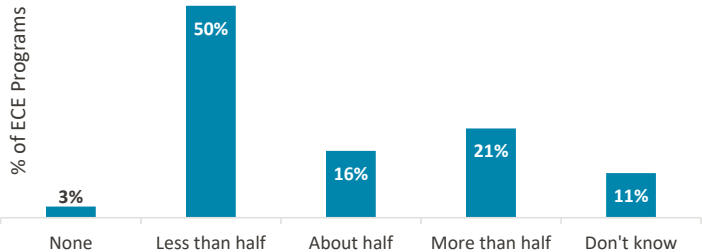
Post ECE: Family Jewish Engagement



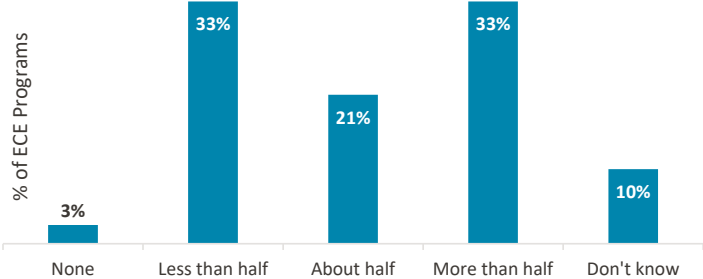
Enroll Their Child(ren) In Jewish Day School or Yeshiva



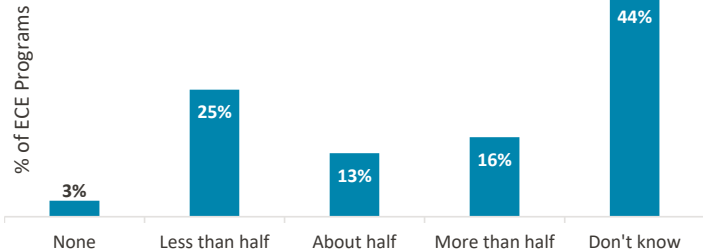
Enroll Their Child(ren) In A Part-Time Jewish Religious School



Participate Regularly in Family Programming at Jewish Organizations



Participate in Other Jewish Education/Engagement Programs





Pathways and Barriers to Enrollment: Parent Interviews

Key Themes



Particularism vs. Diversity



Location, Location, Location



The Calendar Can Be Critical



Pedagogy Matters



The Appeal of Languages



Transparency about Tuition Assistance



DIY Judaism





Particularism and Diversity

“In general, the decision for me is, **I want to have my kids exposed to what being Jewish means, to the Jewish holidays, and want them to be proud of who they are** and what they are and where we come from in our roots. And so a Jewish school was really a no-brainer for me.”

—Parent of child recently graduated from Jewish ECE program

“It just seemed like a nice way to have Jewish life be interwoven throughout our family through the context of the kids being in Jewish preschool.”

—Parent of child currently in Jewish ECE program

“I think it does become a slightly less diverse environment, both racially, religiously, socioeconomically. There’s definitely some diversity in the Jewish preschools, but at our [general] preschool, it’s really diverse... **if we’re going to be a family that decides to live and raise our kids in San Francisco, we want to embrace those aspects of urban life.**”

—Parent who considered but did not enroll child in Jewish ECE program

“We did talk about at the time, and we have continued to talk about, **the concept of sending our kids to a racially and culturally monolithic place, which is in stark contrast to where we live ...** and the elementary school that we send our [older] kids to.”

—Parent of child currently in Jewish ECE program





Particularism and Diversity

Opportunity

- There is a growing understanding and recognition of the Jewish community's multiple forms of diversity— racial, ethnic, economic, religious, gender, and family among them. This creates an opportunity for the Jewish ECE programs ecosystem to expand and highlight the diversity of families in their schools and, in the process, change the perceptions of some that the Jewish community lacks the kinds of diversity they value.

Challenge

- At the same time, even as various forms of diversity grow in the Jewish community, quantitatively there is less *racial and economic diversity* in the Jewish community than in the general population, demographic factors that are beyond the power of programs to change.





Location, Location, Location

“Part of it was just location. My son started off at the JCC preschool. And **a big part of the decision there was just that it was a very close preschool to our home.**”

—Parent of child currently in Jewish ECE program

“We originally only applied to this one because it’s where we are members and **it’s walking distance to our house, it’s our community.**”

—Parent of child currently in Jewish ECE program

“Convenience was going to be really important. My husband works full time, and **we didn’t want to spend half our morning taking them to school** ... so location was a big factor.”

—Parent who considered but did not enroll child in Jewish ECE program

“Location has a bit of an impact. So there are, to my knowledge, two Jewish [preschools] in our area. And **they’re both sort of out of the way, but we could have made it work if everything else was leaning toward it.**”

—Parent who considered but did not enroll child in Jewish ECE program

“I mean walking distance, that’s a game changer, so yeah I might have compromised some of my other factors for walking distance.”

—Parent who considered but did not enroll child in Jewish ECE program





Location, Location, Location

Opportunity

- There are families who would choose Jewish ECE programs if they were more conveniently located to them.

Challenge

- Absent the community situating more Jewish programs in geographically underserved areas, location will continue to be a challenge for some parents who might otherwise choose a Jewish program.





Pedagogy Matters

“A lot of schools say they are play based but at the JCC when I did the tour, it just felt more intentional, really trying to follow that philosophy more...So that on its own, **that was almost one of the most important aspects for me.**”

—Parent of child currently in Jewish ECE program

“**The way the [Jewish preschool] approaches play-based education was not a good fit for my son...**I’d definitely consider that type of education for my daughter. But for my son, he didn’t know what to do with himself in the absence of structure.”

—Parent who considered but did not enroll child in Jewish ECE program





Pedagogy Matters

Opportunity

- Programs have an opportunity to serve children with varied learning styles.

Challenge

- For ECE programs, meeting the needs of those who thrive in play-based environments and those who do not is a difficult task without more teachers and more space.
- With relatively low salaries and limited benefits, recruiting and retaining teachers remains difficult, and many program already report they are understaffed.





The Appeal of Languages

“The third aspect of why we picked the JCC is the Hebrew immersion program.”

—Parent of child currently in Jewish ECE program

We wanted him to speak Hebrew more at home, given that we speak Hebrew at home, his two siblings speak English among themselves, but they are still very fluent in Hebrew... And since he’s the youngest we felt that he needed more Hebrew around him. So, **we really like Ulpanon which is a class where the teachers are Hebrew speaking and they encourage the same from the kids. So that was also a big element.**”

—Parent of child currently in Jewish ECE program

“They ended up going to a Mandarin immersion preschool, which is something we can’t provide at home ...My [child] had become very interested in language.”

—Parent who considered but did not enroll child in Jewish ECE program

“We also have a Spanish-speaking nanny in our family. So **we had a pretty good sense that we wanted to consider a language immersion program, Spanish language particularly.**”

—Parent of child currently in Jewish ECE program





The Appeal of Languages

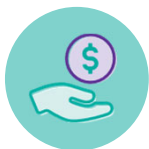
Opportunity

- Jewish ECE programs are a natural fit for those who would like their children exposed to Hebrew, especially Israeli parents who want the Hebrew they speak at home reinforced at school.
- Expanded language instruction could be an incentive for enrollment among some parents.

Challenge

- Expanded language instruction would require new resources and different allocations of time that programs may be unwilling or unable to implement.
- It may also detract from the particularistic Jewish context that is appealing to some parents.





Transparency about Tuition Assistance

“Preschool was surprisingly expensive and **[the Jewish preschool we chose] was one of the few preschools that awarded us a scholarship.** So that was a really big factor in choosing to send our child there.”

—Parent of child currently in Jewish ECE program

“I wasn’t really made aware of [any tuition assistance] that was available. And even if I had been aware, I’m not sure we would have really qualified because on paper we are high earners. But I think the biggest thing is **I was not informed of any option for [tuition assistance].**”

—Parent who considered but did not enroll child in Jewish ECE program

“So cost was a deterrent and one of the factors in taking him out of the school. It was really expensive and I don’t think financial aid was promoted as much. Now I have friends who had just enrolled their kid and they are probably around the same income level as us, and they applied for financial aid and got a pretty substantial amount. So we may send him back ... but we would only send him back if we were able to get financial aid.”

—Parent who enrolled but then took child out of Jewish ECE program

“The JCC was expensive, but you could have a scholarship. The packet to get a scholarship was insane. I am sorry, I do not have an interest in giving you all of this information just to get a couple of hundred dollars off. So the barrier to entry just felt like a lot.”

—Parent who considered but did not enroll child in Jewish ECE program





Transparency about Tuition Assistance

Opportunity

- For parents who would otherwise choose Jewish ECE programs except for cost barriers, the community has an opportunity to increase enrollment through additional tuition assistance, greater transparency about its availability and eligibility criteria, and a less burdensome process for obtaining assistance.

Challenge

- Raising additional funds for tuition assistance would require additional resources devoted to financial development.
- Programs face a competitive fundraising environment in the Jewish community.





The Calendar Can Be Critical

“The schedule was very challenging. We knew about it ahead of time, but I think you look at it and think oh that’s a lot of days off and you don’t really realize how much they’re going to impact you until you’re like scrambling to figure out what to do with your kids when they have like 2 days off for Jewish holidays that the rest of America doesn’t.”

—Parent of child currently in Jewish ECE program

“It’s hard to have that many days off work.”

—Parent who considered but did not enroll child in Jewish ECE program





The Calendar Can Be Critical

Opportunity

- Programs offering more holiday coverage could remove a barrier to enrollment for some parents.

Challenge

- Staffing on Jewish holidays could be difficult, especially if Jewish staff of the programs want the days off to observe the holidays.
- Substitute staffing has the potential to create another set of challenges to programs.





Do-It-Yourself Judaism

“I didn’t really feel like I wanted to pay for a Jewish private school education, if primarily what made that school Jewish was kind of a Jewish-values infused education because **I felt like they could get that part through our family.**”

—Parent who considered but did not enroll child in Jewish ECE program

“We spoke to the folks [at the Jewish preschool] but it was really expensive and not quite as convenient. And at the end of the day, **we realized that we could provide the Judaism at home**, like preschool to preschool the programming was the same except the Judaism and we could provide that at home.”

—Parent who considered but did not enroll child in Jewish ECE program





Do-It-Yourself Judaism

Opportunity

- By appealing to already engaged Jewish families, programs can strengthen the Jewish environment and context of their communities. Having DIY families in the schools rather than outside would be beneficial to the community.

Challenge

- Decoupling the DIY approach from other factors that create barriers to enrollment and can be addressed separately.





Jewish ECE: Promise and Potential

Expanding Social and Friendship Circles

“We have more Jewish friends, my son became friends with several of the kids and still is close with them and we became friends with their parents and **we just kind of have a larger Jewish friend group and network from sending them there.**” —

Parent of child currently in Jewish ECE program

Creating a Stronger Connection to Judaism at Home

“[My child is] just loving it ... and that’s contagious. She comes home and she’s excited and we talk about it at home. And we do our version of doing Jewish things at home. So while we’re not as religiously observant as some of her classmates, we still like to have challah on Fridays and it’s becoming a sort of weekly tradition to do some of these things, which is just really nice.” —Parent of child recently graduated from Jewish ECE program

More Definitive Plans for Continuing Their Children’s Jewish Education

“We're already looking at Jewish day schools for my son for kindergarten, just because we feel like, gosh, it would be weird to not be at a Jewish school now that we’re sort of used to that.”

—Parent of child currently in Jewish ECE program





Q&A

