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Working Conditions for Early Educators in San Francisco: Findings From the 2025 SEQUAL Survey

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This project was funded by the San Francisco Department of Early Childhood.



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About CSCCE

The Center for the Study of Child Care Employment (CSCCE), founded in 1999, is the national leader in early care and education workforce research and policy. CSCCE provides research and analysis on the preparation, working conditions, and compensation of the early care and education workforce. We develop policy solutions and create spaces for teaching, learning, and educator activism. Our vision is an effective public early care and education system that secures racial, gender, and economic justice for the women whose labor is the linchpin of stable, quality services.

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Working Conditions for Early Educators in San Francisco: Findings From the 2025 SEQUAL Survey

Executive Summary

A better understanding of variations among early educators' working conditions can help policymakers, advocates, funders, and educators prioritize and target resources for the early care and education (ECE) field. To gather early educators' perspectives, the San Francisco Department of Early Childhood (DEC) asked the Center for the Study of Child Care Employment (CSCCE) to assess early educators' working conditions in the city and county of San Francisco using a specialized instrument, the Supportive Environmental Quality Underlying Adult Learning (SEQUAL) survey.

Between January and March of 2025, CSCCE canvassed 1,080 early educators employed in center- and home-based programs throughout San Francisco. The majority of early educators in San Francisco who responded to the survey were women, and more than two thirds identified as people of color. Forty-nine percent of center-based teachers, 66 percent of center-based assistant teachers, and 77 percent of family child care (FCC) providers were born in another country. More than one half of early educators in San Francisco were 40 years of age or older. Furthermore, educators who responded to the survey had similar if not higher educational attainment, better wages, and greater economic stability than their regional and state counterparts.

The survey findings presented in this report provide a window into the working conditions of San Francisco early educators. While staffing capacity and professional development content and accessibility are identified as areas for growth, in general these educators feel well supported in their programs and by DEC initiatives.

Key Strengths of Working Conditions in San Francisco

The early care and education workforce in San Francisco is highly educated and experienced. In comparison to their regional counterparts, a greater proportion of San Francisco early educators have earned an associate degree or higher (83 percent of center-based teachers in San Francisco, compared to 78 percent in the Bay Area and 74 percent throughout California). In addition, most San Francisco family child care providers reported stability and dedication to the field, with 82 percent being in the ECE field for more than six years and 26 percent being an FCC provider for more than 15 years.

Center-based early educators in San Francisco earn higher wages than their peers in the Bay Area and across California. Earnings are higher among center-based teaching staff than their regional or state counterparts, falling within the range of the estimated living wage in San Francisco, which is \$29.31 an hour for an adult with no children and \$32.75 an hour for two adults and one child, both adults working (Living Wage Institute, 2025). For a variety of reasons, FCC provider wages were more difficult to estimate. While they also appear to be making a living wage, further research is necessary to provide a more accurate estimate.

Economic indicators also point to increasing economic stability among center-based teaching staff and family child care providers in San Francisco. As indicators of economic stability, a greater proportion of both center-based teaching staff and FCC providers are enrolled in health insurance and have retirement savings in comparison to educators regionally and across the state. For example, 43 percent of FCC providers in San Francisco have retirement savings, compared to 35 percent and 27 percent of their peers in the Bay Area and California, respectively.

Opportunities for Future Improvement of Working Conditions

Many early educators' responses point to a need for increased staffing capacity in center-based programs. Nonetheless, respondents did not unanimously agree that adequate staffing existed in their programs to cover breaks or act as floaters and substitutes. One half (51 percent) of center-based teaching staff indicated that hiring new staff does not happen quickly when turnover occurs in the program. Furthermore, more than one third (40 percent) of center-based teaching staff indicated that without sufficient staffing they are unable to provide children with the one-on-one attention needed to support their learning and development.

Developing home- and center-based program access to a substitute pool might provide a source for staffing when providers or teaching staff are absent. The need is particularly acute for FCC providers who do not have consistent access to a source of substitute providers. Three quarters (74 percent) of small FCC providers and more than one half (57 percent) of large FCC providers indicated that substitutes are not available when an emergency arises. With additional support, a substitute pool could also act as an entry point or a direct pathway into the field of early care and education.

Early educators' responses illustrated their desire for a **strengthened pathway for entry into and professional growth in the ECE field**. Between 54 and 49 percent of center-based teaching staff did not agree that sufficient training is available in a variety of early education topics, such as trauma-informed practices, supporting dual language learners, supporting family needs, and teaching children with challenging behaviors. Thus, roughly one half of the center-based teaching staff in San Francisco appear to have interest in seeking additional or deeper training. FCC providers likewise require additional expertise and training as small business owners. The majority (77 percent) of FCC providers indicated they have received some business training, but fewer had written budgets for their programs and/or had comprehensive training on business operations in the past year (50 percent and 33 percent, respectively). While there are a wealth of professional development and training opportunities for center- and home-based programs in San Francisco, identifying topics for further and deeper exploration, developing more content tailored to home-based programs, and creating more and diverse ways to access and engage with these trainings will help strengthen pathways for the ECE workforce in San Francisco.

Conclusion

The San Francisco Department of Early Childhood has invested significantly to improve the wages and working conditions of the ECE workforce. Feedback from early educators indicates that these investments are having the intended effect: improving their pay and working conditions and supporting a path to professional and personal growth. Nonetheless, strengthening early educators' working conditions requires continued investment and consistent evaluation. With this foundation, policymakers and stakeholders can work alongside early educators to ensure their rights, raises, and respect, along with family sustaining wages, creating good jobs and sustainable careers.

I. Introduction

Early care and education (ECE) working conditions are the programmatic and environmental factors that educators experience in their programs and classrooms. Considered holistically, these conditions include early educators' pay and access to benefits, formal employment policies and informal or unwritten practices, whether and how educators are involved in decision-making processes, access to opportunities and support for professional learning, staffing patterns and priorities, teaching supports, professional and personal relationships with colleagues, school climate, and the physical elements of the workplace—both internal (e.g., within the building or space) and external (e.g., the neighborhood context). Research affirms that early educators' work environments influence their teaching practice and children's learning outcomes (Institute of Medicine & National Research Council, 2015). Attracting and retaining educators who are skilled at nurturing children's development and learning requires that ECE environments support educators' practice and well-being. Holistically supportive environments meet children's learning needs by supporting the needs of early educators, yet attempts to improve the quality of ECE environments often take a narrow view, addressing one or two areas, and rarely offer educators holistically supportive working conditions (Whitebook et al., 2016).

San Francisco supports the ECE workforce.

The City and County of San Francisco, the only combined city–county government in California, has long recognized the importance of early care and education and the fact that early educators' work environments are essential ingredients to high-quality early learning and care. The San Francisco Department of Early Childhood (DEC) operates several initiatives in the service of children, families, and the ECE workforce:

- **Early Learning for All (ELFA)** supports families' access to affordable child care through a tuition credit or fully funded tuition. The ELFA network of 500+ ECE programs serves children birth through six years, including home- and center-based Universal Prekindergarten programs in San Francisco, Head Start, and San Francisco Unified School District (SFUSD) preschool.
- The **Workforce Compensation Initiative** is a local compensation program for center- and home-based educators, publicly funded through the Early Care and Education Commercial Rents Tax.

- **Early Learning Program Quality**¹ provides quality improvement opportunities to educators and programs.
- **Early Learning Facilities** invests in improvements and updates for current programs and the development of new programs.
- DEC supports 26 **family resource centers** throughout San Francisco to offer free parent training and support, along with family and child activities.
- **Early Connections** is a child development program that offers free developmental screenings and connects families to Early Intervention services.

Compensation Initiatives

The Workforce Compensation Initiative currently comprises two programs: the Compensation and Retention for Early Educators Stipend (CARES) and the Early Educator Salary Support Grant (EESSG). CARES began in 1999, prior to the implementation of the tobacco tax and the creation of First 5, when advocates compelled city leaders to utilize \$1.5 million from the city's general fund to establish a retention incentive initiative for early educators (Caspary et al., 2001). Over time, CARES has changed significantly. Originally, it was a modest stipend linked to continuing education and coursework for career advancement (similar to the current DEC Stipend for Early Educator Professional Development program described in the following section). Now in its third iteration, CARES 3.0 is a much larger compensation program, with early educators employed in an ELFA program receiving an average of \$13,000 per year, regardless of continuing education.

CARES is now sustained through Proposition C, the Early Care and Education for All Initiative, passed by San Francisco voters in June 2018. Prop C established a Gross Receipts Tax on commercial property leases for businesses with annual revenues over \$1 million, generating approximately \$146 million annually for early childhood programs (San Francisco Department of Election, 2018). EESSG began in October 2022 and is

¹ The San Francisco Department of Early Childhood's program quality standards include family partnership, safe and engaging environments, engaged teachers and effective interactions, learning opportunities, and continuous professional development (San Francisco Department of Early Childhood, n.d.).

also funded through Prop C. This program provides grants to ECE agencies to ensure wage increases are made directly to eligible educators via payroll. The creation of EESSG signifies growth in San Francisco's compensation reform. While CARES is available to both center- and home-based programs,² EESSG is currently available only to center-based programs where at least one half of the children enrolled receive tuition assistance.³

New Initiatives Supporting Early Educator Preparation

In addition to compensation initiatives, San Francisco invests in preparation and training support for early educators, including professional development, qualification attainment (e.g., Child Development Permits, degrees), and other educational supports (e.g., stipends, technology, mentorship), which are aspects of ECE work environments. In March 2025, the Department of Early Childhood announced a new initiative: the Early Educator Pathways Program (Pathways), designed to be the primary program for early educator professional growth. Pathways awards grants to local agencies that then administer a variety of programs to expand access for early educators to higher education over the next two years (San Francisco Department of Early Childhood, 2025b). To serve the incumbent workforce and recruit new educators, Pathways uses a cohort model and specifically includes academic scholarships, stipends, coaching, apprenticeships, and on-the-job training. Such elements have been demonstrated to support educator success and remove barriers to higher education completion and training (Chu et al., 2010; Sakai et al., 2014; Whitebook et al., 2013).

The Stipend for Early Educator Professional Development (SEEPD) program began as a pilot program in 2024 to temporarily offer stipends to educators working at ELFA programs who complete one or more preparation milestones, including:

² Through public feedback, family child care providers indicated they would prefer to remain in a stipend program as they did not feel they had the administrative support needed to complete the required quarterly reporting for EESSG (e.g., payroll, enrollment), in addition to general challenges of distributing funds through payroll.

³ Only those educators working at centers where at least 50 percent of the children received tuition assistance were eligible for compensation increases.

- Foreign transcript evaluation support;
- Completion of college coursework towards a Child Development Permit, towards a specialization program, or towards an associate, bachelor's, or master's degree;
- Completion of an associate, bachelor's, or master's degree; or
- Attainment, upgrade, or renewal of a Child Development Permit.

SEEPD is a pilot program, thus its continuation depends on future funding and the consideration of its current efficacy and impact (San Francisco Department of Early Childhood, 2025a). While this type of stipend program provides financial incentive to participants, the initial financial burden rests with educators, who must pay tuition upfront to enroll in courses.

Current Study Purpose

The San Francisco Department of Early Childhood provides significant resources to support early educators, children, and their families and continues to build knowledge to understand early educators' experiences and where further investments might be needed. San Francisco sought a data-driven approach to understand early educators' current contexts, needs, and conditions and to inform future investments. To gather these data, DEC approached the Center for the Study of Child Care Employment (CSCCE) to conduct a Supportive Environmental Quality Underlying Adult Learning (SEQUAL) survey. This comprehensive assessment examines educators' working conditions from their perspectives, addressing such elements as available supports, professional development, program policies and practices, educator well-being, and program leadership and management, among others.

What is SEQUAL?

SEQUAL is rooted in decades of educator advocacy for improved pay and working conditions. As part of this advocacy work, educators contributed to the development of the [Model Work Standards](#): a comprehensive list of standards for home- and center-based educators (Center for the Study of Child Care Employment [CSCCE] & American Federation of Teachers Educational Foundation [AFTEF], 2019). Educators' perspectives on their work environments are essential to shaping policy and practice recommendations to improve program quality, child outcomes, and early educator well-being (International Labour Office [ILO], 2013). Thus, to capture early educators' assessment of their work environments and to support the inclusion of educators' input

into quality improvement strategies, CSCCE drew upon the Model Work Standards and other ECE environmental measures and standards to develop the Supportive Environmental Quality Underlying Adult Learning survey, or SEQUAL (Whitebook et al., 2022).

As with the Model Work Standards, there are two versions of the tool: SEQUAL for center-based teaching staff and SEQUAL for family child care (FCC) providers, who work in home-based programs. While both surveys cover many shared elements of the work environment, the home-based program survey responses are not universally comparable to those in the center-based measure. There is also an additional companion survey for center-based program administrators that is used to capture program information to contextualize educators' responses. Many of these program-level questions are also included on the home-based program survey because FCC providers are the owners and operators of their programs and therefore administrators as well as educators. Both SEQUAL surveys address the following key areas of early educator work environments:

- **Teaching Supports:** Teaching Supports are the tools and conditions that enable early educators to apply their knowledge and skills and provide high-quality early learning experiences for children. SEQUAL asks questions related to staffing, curriculum materials, resources and training for working with children and families, opportunities for reflection on one's teaching and assessment of children, time to develop curriculum, and program policies that allow access to professional development (e.g., paid time off to participate in professional development, training paid by program).
- **Learning Community:** The Learning Community encompasses issues of policy, practice, and relationships that strengthen and refine teaching practice. Questions in this section explore whether the topics of trainings are relevant and available, if educators have time and are encouraged to practice emerging skills developed during trainings, and the support or encouragement educators receive from colleagues or leaders for testing new strategies and ideas.
- **Job Crafting (center-based programs only):** This area includes the workplace practices and relationships that support individual teaching staff to design and determine their job. We ask about the amount of input and autonomy they are afforded to make decisions in their classroom and program, along with the level of teamwork (i.e., collaboration) they perceive among their classroom colleagues.
- **Business Practice Supports (home-based programs only):** These elements and practices of home-based programs support and facilitate the successful operation of a provider's business, including time for professional responsibilities, aspects of their

physical space, and resources for operating the business (such as technology and training).

- **Adult Well-Being:** SEQUAL approaches well-being holistically, encompassing economic security (including compensation), physical health and wellness, emotional well-being, and interpersonal relationships among colleagues throughout the program, including how those relationships are fostered by program administrators.
- **Program Leadership and Management:** Leadership quality is understood through educators' perceptions of if and how administrators fulfill leadership functions, along with how leaders provide support and guidance to educators' practice.

About This Report

Between January 2025 and March 2025, CSCCE surveyed 1,080 early educators employed in center- and home-based programs throughout San Francisco. **Table 1** shows the number of educators invited to participate and the response rate.⁴ To date, the response rate of San Francisco center-based teaching staff is the highest of any SEQUAL study. **Chapter II** includes findings from center-based programs and teaching staff, followed by results from home-based educators in **Chapter III**. Each chapter begins with a summary of the **Key Strengths** and **Opportunities for Future Growth** for early educator working conditions in each setting. More detailed data and a discussion of the findings follow these summaries. Finally, the **Appendices** include tables and figures with SEQUAL survey findings not presented in the main report.

The findings presented in this report capture the experiences of educators who responded to the SEQUAL survey. While we received a substantial number of responses from ECE professionals across the city and county, these findings should not be generalized as reflecting the experiences of *all* early educators in San Francisco—the results offer a lens with which to understand educator experiences. Throughout the report, the number of educators who responded to certain questions will vary. This variation occurs for a number of reasons, including (but not limited to) educator prerogative: educators could decline to respond to any question.

⁴ This response rate provides a snapshot of the educators who completed the survey at a specific point in time. The data presented are not representative of all early educators in San Francisco in all program types.

Table 1. Population and Sample, By Program Type
San Francisco SEQUAL, 2025

	Invited to Participate	Participated*	Response Rate
Center-Based Directors	140	66	54%
Center-Based Teaching Staff	2566	876	30%
Home-Based FCC Providers	744	138	19%

*Throughout the report the n is variable because participants can decline to answer questions.

Table by Center for the Study of Child Care Employment

Educators rate SEQUAL items on a six-point scale from strongly disagree to strongly agree. Because the difference between strong and regular agreement is difficult to quantify, in this report our category of "agree" combines "strongly agree" and "agree" responses, while "disagree" combines "strongly disagree" and "disagree" responses. The middle categories of "somewhat agree" and "somewhat disagree" have been combined into a single "mixed response" category to capture responses that indicate partial, inconsistent, or conditional agreement with survey items. This abbreviated scale eases interpretation of the findings as well as derivation of recommendations.

Key Terms

Center-Based Programs: Center-based programs provide care for periods of less than 24 hours to children and are usually located in a commercial building. Centers acquire licenses to provide care to different age groups of children. A center can hold one or more of the following license types: child care center, infant care center, toddler program, school-age program, child care for mildly ill children.

Directors: Center-based administrators, site supervisors, and other individuals responsible for daily operations of center-based programs.

Teaching Staff: Center-based lead and assistant teachers who work directly with children. Assistants (also called “teacher aides” or “associate teachers”) work under the supervision of a lead teacher, sometimes referred to as a “head teacher” or “master teacher.”

Child Development Permit: In California, to provide care, an educator must have a Child Development Permit. There are six permit levels, from Child Development Assistant Permit to Child Development Program Director Permit, each requiring further education and experience requirements. The permit required depends on the roles and responsibilities assigned to the educator.

Family Child Care (FCC) Program: FCC educators obtain a license to provide child care for a mixed-age group of children in their home. FCC providers may own or rent their homes, but all sites must meet the strict requirements of state licensing. May also be called home-based providers.

FCC License Type: An FCC provider can hold either a “small” or “large” license, a distinction that corresponds to the maximum group size (up to eight children for a small license and up to 14 for a large license). Most often, small FCC providers operate their child care program on their own, while large FCC providers typically work with at least one assistant.

II. Findings: Center-Based Care

This chapter examines findings from 876 center-based teaching staff⁵ who participated in the SEQUAL study. The chapter first describes educators working in San Francisco's center-based ECE programs, offering information about center and educator characteristics. The findings that follow point to the strengths of center working conditions and indicate how San Francisco could build on current investments to further support early educators.

Key Strengths

Exceptional Workforce Foundation

- **74 percent** of teaching staff have 6+ years of experience in ECE.
- **64 percent** of teaching staff have an associate degree or higher.

Strong Teamwork

- **82 percent** of teaching staff view themselves and their colleagues as a team.

Positive Perception of Supervisors

- **84 percent** of teaching staff report their supervisor is knowledgeable and knows their teaching staff.

Earnings Higher Than Regional or State Counterparts

- At \$30-33 per hour, wages fall within the range of the estimated living wage (\$29 per hour for a single adult).

Opportunities for Growth and Future Investment

- Increase staffing capacity.
- Further strengthen pathways for entry and growth in the ECE field.
- Identify which training modalities educators prefer.
- Tailor topics for professional development.
- Continue investing in educators' compensation and evaluating the effect of these investments.

⁵ "Teaching staff" includes both assistants and teachers. When possible and/or when there are notable differences, variations by job role (i.e., teacher and assistant teacher) are presented.

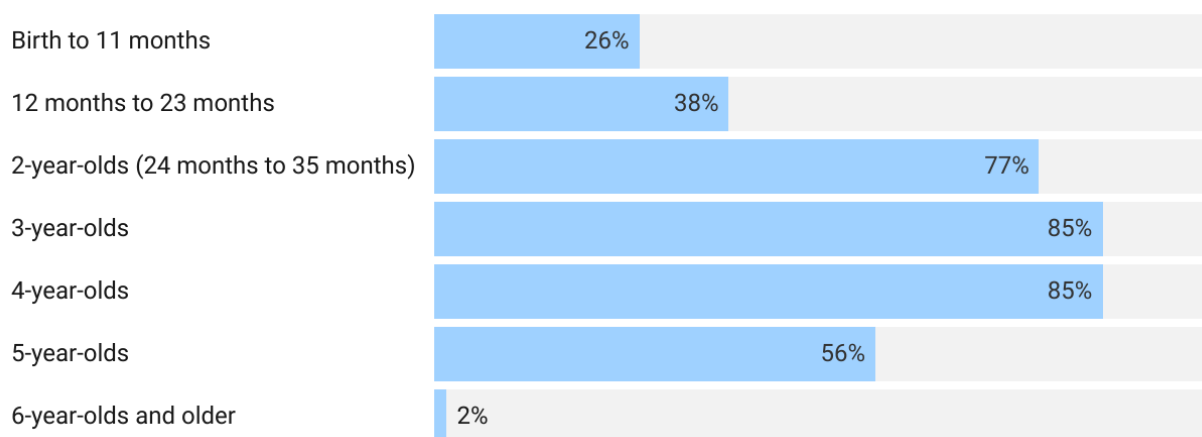
Center-Based Program Characteristics

Center-based programs often navigate numerous funding streams and quality standards to meet licensing requirements, remain in operation, and fulfill the needs of children, families, and educators. Of the 66 program administrators and directors who participated in the survey, more than one half (59 percent) reported their center was a private nonprofit, one quarter (27 percent) reported receiving public funding, and 14 percent reported operating a for-profit program.

Based on program director responses, center programs primarily enrolled two-, three-, and four-year-old children (shown in **Figure 1**). One quarter (26 percent) of programs enrolled children birth to 11 months, more than one third (38 percent) enrolled children age 12 to 23 months, and very few (2 percent) enrolled school-age children (age six and older).

Figure 1. Center Enrollment, By Age Group

San Francisco SEQUAL, 2025



Center directors n=62

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

The majority of program directors (71 percent) reported having a waitlist for their program. Nearly one half (42 percent) reported a waitlist specifically for three-year-olds.

Three quarters (74 percent) of program directors indicated operating during typical weekday work hours (7:00 a.m. to 6:00 p.m.), being open for care a mean of 43 hours per week. Very few directors indicated offering overnight or extended care hours.

Center-Based Educator Demographics

Center-based educators in San Francisco who responded to the survey are overwhelmingly women of color, primarily of Asian descent (see **Table 2**). Compared to their counterparts in the Bay Area⁶ and throughout California,⁷ center-based early educators in San Francisco are more likely to have been born outside of the United States: 49 percent of teachers and 66 percent of assistant teachers. Many center-based educators speak a language in addition to or other than English, most commonly Chinese.

Table 2. Center-Based Educator Characteristics, By Job Role and Location
San Francisco SEQUAL, 2025

	SF Center Directors	SF Center Teachers	SF Center Assistants	Bay Area Center Teaching Staff*	CA Center Teaching Staff*
Race/Ethnicity	(n=67)	(n=402)	(n=330)	(n=1,337)	(n=3,689)
Asian	44%	59%	69%	26%	11%
Black or African descent	13%	6%	5%	4%	4%
Latino	9%	20%	22%	32%	46%
Other	33%	5%	4%	39%	39%
Age	(n=67)	(n=390)	(n=304)	(n=1,611)	(n=4,156)
19 to 39 years	19%	43%	35%	53%	53%
40 to 59 years	61%	46%	41%	39%	40%
60 years or older	19%	12%	14%	8%	8%
Gender	(n=69)	(n=399)	(n=315)	(n=1,274)	(n=3,583)
Female**	97%	95%	97%	93%	97%
Country of Birth	(n=69)	(n=399)	(n=315)	(n=1,427)	(n=3,872)
United States	57%	40%	17%	57%	74%
Another country	36%	49%	66%	32%	22%
Decline to answer	7%	11%	17%	11%	4%

Continued...

⁶ The Bay Area region includes the following counties: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma.

⁷ When applicable, data on early educators in the Bay Area and California are presented, drawn from the 2025 California Workforce Study, which includes approximately 2,500 center-based teachers and assistants (Powell et al., 2025a, 2025b).

Table 2. Center-Based Educator Characteristics, By Job Role and Location, *Continued*
San Francisco SEQUAL, 2025

	SF Center Directors	SF Center Teachers	SF Center Assistants	Bay Area Center Teaching Staff*	CA Center Teaching Staff*
Languages Spoken	(n=69)	(n=399)	(n=315)	(n=1,391)	(n=3,814)
English	81%	92%	72%	94%	97%
Chinese	32%	44%	61%	12%	4%
Spanish	13%	22%	23%	36%	43%
Other	19%	18%	11%	17%	11%
Children in Household	(n=67)	(n=390)	(n=304)	(n=1,317-1,325)	(n=3,745-3,450)
Under 5 years old	12%	19%	15%	21%	21%
Between 6-17 years old	36%	39%	49%	39%	39%

* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

** Due to sample size, we are unable to report on other genders. We gratefully acknowledge the contributions of early educators who identify as men, nonbinary, or another gender identity and recognize that the gendered oppression of women in the ECE workforce is related to the gender-based oppression of nonbinary, trans, and genderqueer educators.

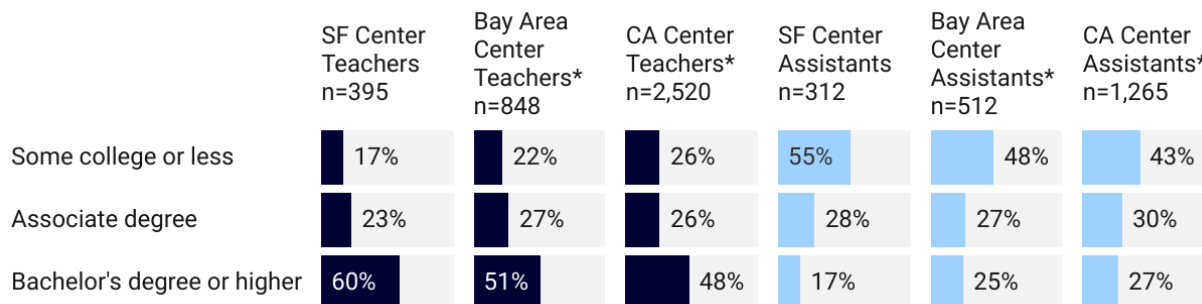
Source: Center for the Study of Child Care Employment, University of California, Berkeley

Key Strengths

The center-based workforce in San Francisco is highly educated and experienced.

The teaching staff who responded to the SEQUAL survey are highly qualified professionals who bring considerable experience to their work with children and families. Nearly one half (45 percent) of assistant teachers and the vast majority (83 percent) of teachers in San Francisco have earned an associate degree or higher, with 60 percent of teachers holding a bachelor's degree. Among degree holders, the most common majors were Early Childhood Education and Child Development. **Figure 2** compares the educational attainment of San Francisco's teaching staff with the educational attainment of teaching staff in the Bay Area and throughout California.

Figure 2. Educational Attainment of Center Teaching Staff, By Job Role and Location
San Francisco SEQUAL, 2025

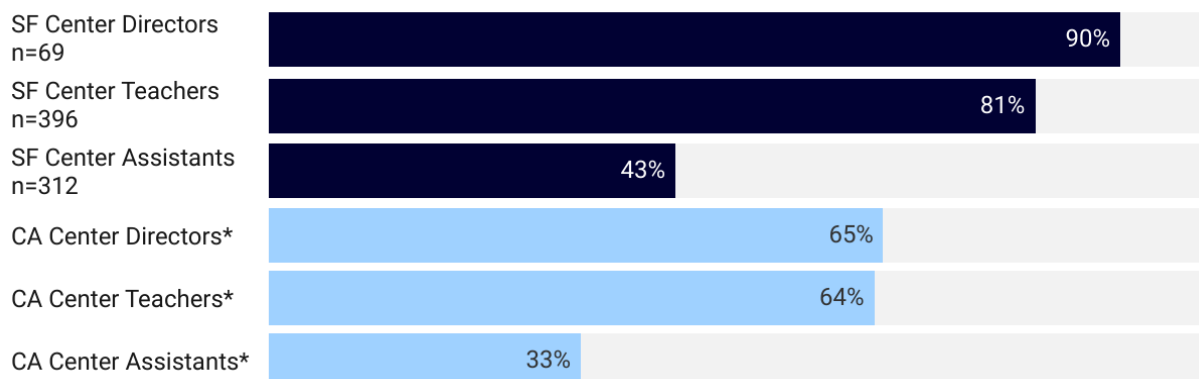


* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

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

Most San Francisco teachers reported holding a Teacher Permit or higher (81 percent), and very few reported having no permit (11 percent). San Francisco's center-based teaching staff reported higher permit levels compared to California early educators overall (see **Figure 3**).

Figure 3. Child Development Permit at the Teacher Level or Higher for Center-Based Educators, By Job Role and Location
San Francisco SEQUAL, 2025

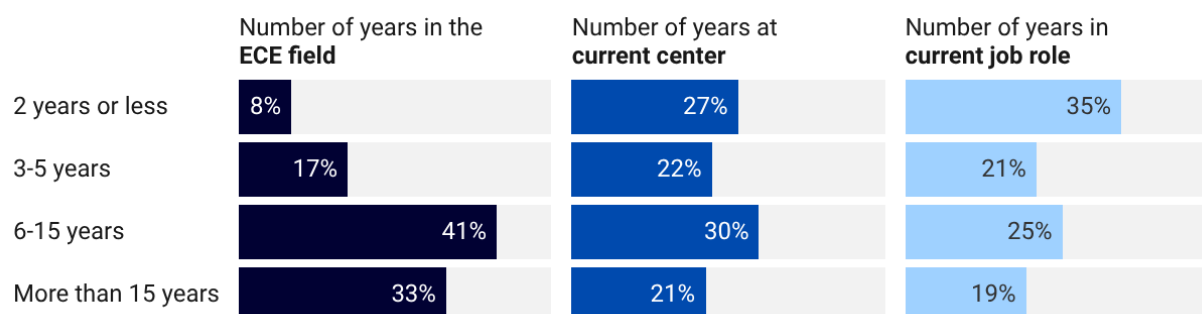


* Data from the 2020 California Workforce Study, which includes approximately 2,000 administrators and 2,500 center-based teachers and assistants (Kim et al., 2022).

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

In addition to degrees and credentials, center-based teaching staff in San Francisco have a wealth of experience in the field (see **Figure 4**). The majority (74 percent) of center-based educators reported working in early care and education for an extended length of time (six years or more), with one third (33 percent) reporting more than 15 years in the ECE field. One half (51 percent) of center-based educators reported being employed at their current center for six or more years.

Figure 4. ECE Experience of Center Teaching Staff
San Francisco SEQUAL, 2025



Teachers and assistant teachers n=743-744

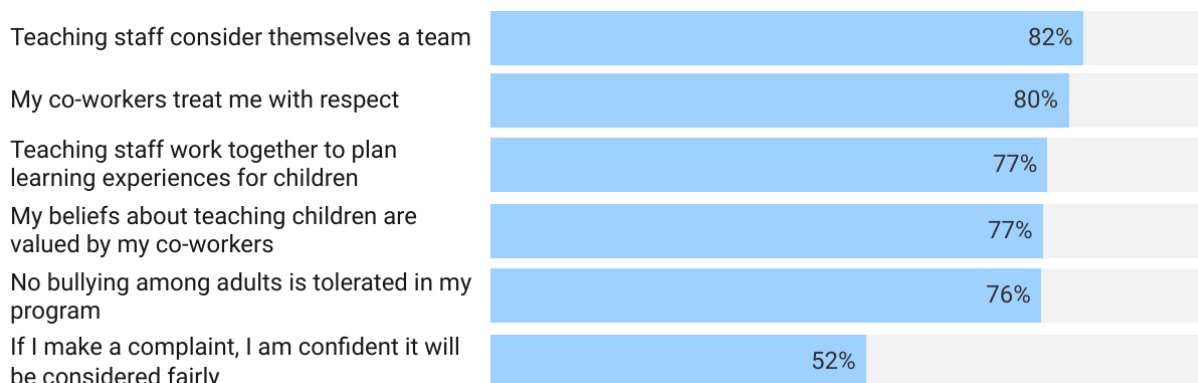
Source: Center for the Study of Child Care Employment, University of California, Berkeley

Center-based teachers in San Francisco report a strong foundation of teamwork and camaraderie.

A large proportion of center teaching staff agreed with SEQUAL statements assessing teamwork among co-workers (see **Figure 5**), indicating a culture of teamwork and collaboration within the classroom. When teaching staff consider themselves part of a well-functioning team, each contributing to the collective operation of their classroom, they are more able to engage in innovation and continuous quality improvement (Schlieber et al., 2023).

Figure 5. Center Teaching Staff Assessment of Teamwork

San Francisco SEQUAL, 2025



Teachers and assistant teachers n=755-784

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

Work climates that foster positive relationships—feelings of trust, respect, and safety—can contribute to positive educational and workforce outcomes. The vast majority (80 percent) of center-based teaching staff agreed that their co-workers treat them with respect. However, a smaller proportion (52 percent) of center teachers and assistant teachers agreed that if they made a complaint, it would be considered fairly. This finding suggests that although teachers and assistant teachers experience healthy relationships within their classrooms, there may still be dynamics that need to be further strengthened at a program level.

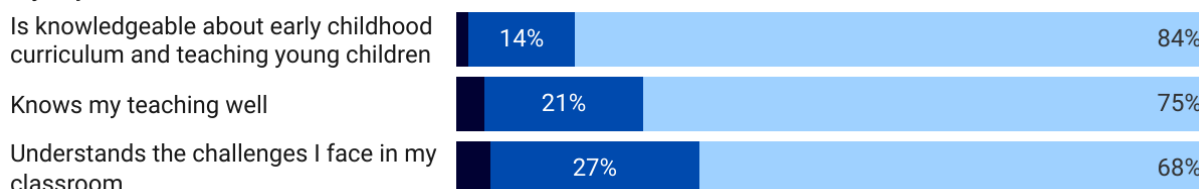
Educators view their supervisors as supportive and knowledgeable.

Effective mentoring and guidance of teaching staff require reflection, observation, and direct knowledge of an individual's teaching practice. Overall, educators' assessment of their supervisors was favorable. As shown in **Figure 6**, most teaching staff agree that their supervisor is knowledgeable about teaching ECE (84 percent), knows their teaching style (75 percent), and understands the challenges they face (68 percent). In addition, nearly one half (47 percent) of center-based teaching staff reported that their supervisor regularly works with them in their classroom, providing supervisors with first-hand knowledge of educators' practice and subsequent opportunities for mentoring.

Figure 6. Center Teaching Staff Assessment of Supervision
San Francisco SEQUAL, 2025

Disagree Mixed Agree

My supervisor...



Teachers and assistant teachers n=766-772

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

San Francisco early educators earn higher wages than their peers in the Bay Area and across California.

Investing in early childhood educators is not just about fair wages—it is about recognizing [educators'] significance in shaping individuals and, ultimately, society. They deserve to be compensated in a way that reflects their influence and responsibility. When we support early educators, we invest in a better future for all.

—Center-Based Teacher Respondent, San Francisco

The effects of Proposition C are reflected in higher wages for San Francisco early educators in comparison to their peers in the Bay Area and throughout the state. Initiatives supported by Prop C acknowledge the skilled nature of early educators' essential work, building on the CARES stipend program and raising wages for early educators working in San Francisco. As shown in **Table 3**, both the self-reported median hourly wages and the director-reported hourly wage range for teachers and assistant teachers align with the estimated living wages for select household compositions in San Francisco, which is \$29.31 an hour for an adult with no children and \$32.75 an hour for two adults and one child, both adults working (Living Wage Institute, 2025).

Table 3. Center Teaching Staff Hourly Wages, By Job Role and Location
San Francisco SEQUAL, 2025

	San Francisco	Bay Area*	California*
Self-Reported Median Hourly Wages			
Lead teacher	\$33.00 (n=333)	\$27.00 (n=677)	\$23.56 (n=2,079)
Assistant teacher	\$30.00 (n=278)	\$22.00 (n=440)	\$20.00 (n=1,032)
Director-Reported Hourly Wage Range	(n=70)	(n=293)	(n=1,114)
Lead teacher	\$31.00-\$39.00	\$25.00-\$31.25	\$21.00-\$26.57
Assistant teacher	\$28.00-\$31.00	\$20.25-\$24.15	\$18.00-\$21.00

* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

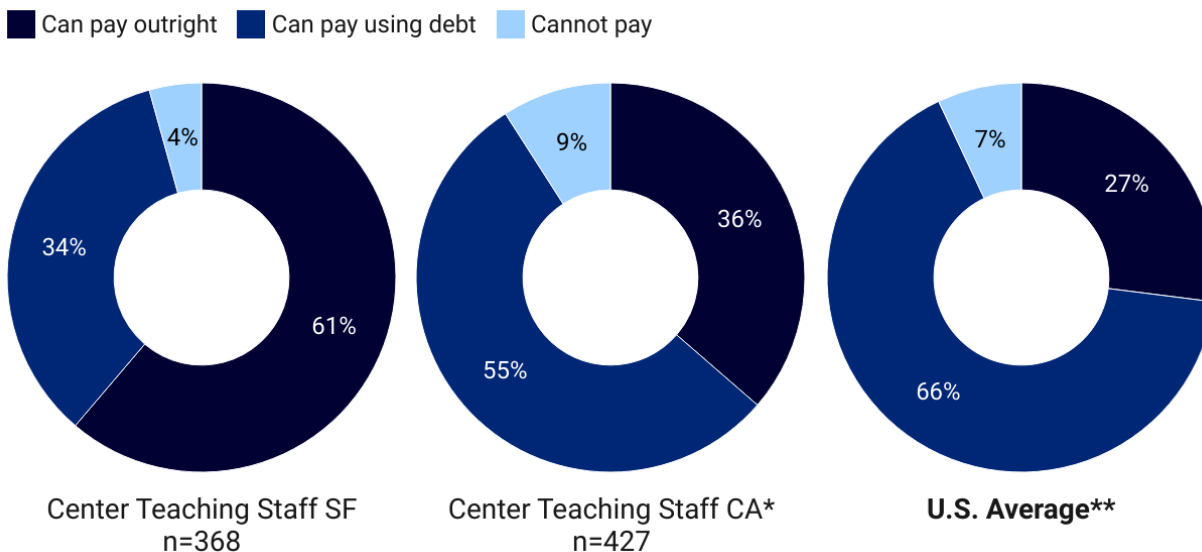
Note: The “director-reported range” reflects the median lowest and highest wages being paid across sites. In contrast, the “self-reported” wage comes from the teachers and assistants who took our survey and reported their earnings directly.

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

Economic indicators point to increasing financial stability for center teaching staff in San Francisco.

One indicator of financial stability is a person's ability to manage unexpected expenses, specifically, whether one could cover such an expense without accruing debt. Most teaching staff in San Francisco can pay for an unexpected \$400 expense without taking on debt: 61 percent, compared to 36 percent of teaching staff throughout California and 27 percent of the general U.S. population (see **Figure 7**).

Figure 7. Ability to Manage a \$400 Emergency Expense, By Location
San Francisco SEQUAL, 2025



* Data from analysis of the economic well-being of the ECE workforce in California in Muruvi et al., 2024.

**U.S. average across members of the labor force age 18 and older in the United States, based on CSCCE's analysis of the 2023 Survey of Household Economics and Decision making (Board of Governors of the Federal Reserve System, 2023).

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

Having health insurance coverage and retirement savings are additional indicators of economic stability. Compared to center-based teaching staff regionally and across California, a larger proportion of center teaching staff in San Francisco indicated having health insurance and retirement savings (see **Table 4**). Taken together, local compensation initiatives appear to be improving economic stability in a high-cost city.

Table 4. Economic Indicators for Center Teaching Staff, By Location
San Francisco SEQUAL, 2025

	SF Center Teaching Staff (n=568-710)	Bay Area Center Teaching Staff* (n=1,102-1,318)	CA Center Teaching Staff* (n=3,256-3,552)
Enrolled in health insurance	100%	96%	94%
Any retirement savings	76%	62%	54%
Food sufficient**	59%	61%	57%
Enrolled in public assistance***	40%	34%	34%
Homeowner	26%	28%	30%

*Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

** We use a question from the Current Population Survey Food Security Supplement about the food eaten in the household in the past 12 months and whether respondents were able to afford the food they needed. Educators who indicated they “had enough of the kinds of food [they] wanted to eat” are considered food sufficient. Other options included “enough but not always the kinds of food we wanted to eat,” “sometimes we did not have enough to eat,” and “often there was not enough to eat.”

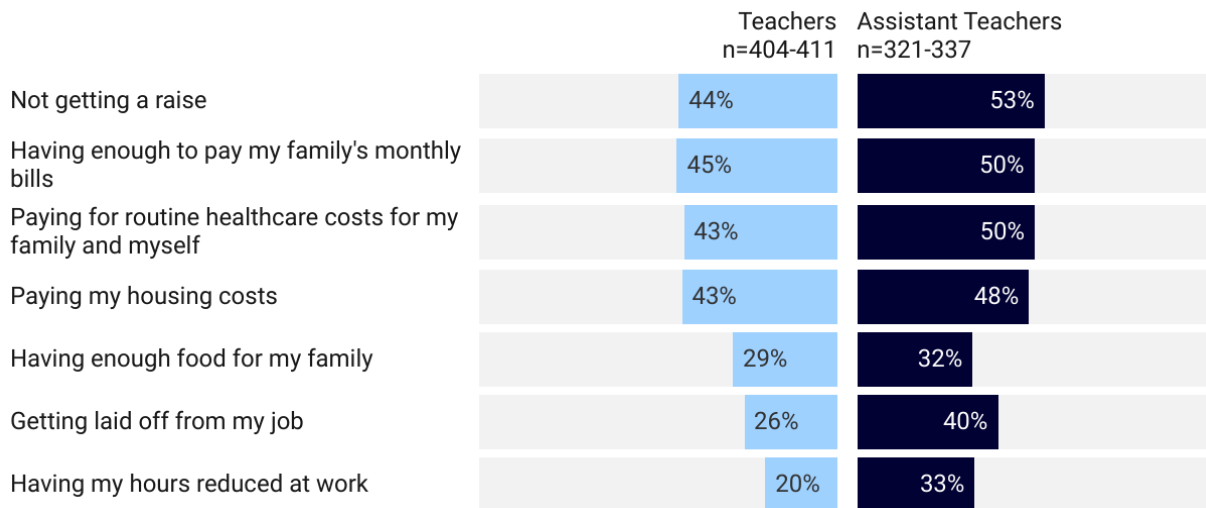
*** Public assistance programs include: Medi-Cal; CalFresh; Special Supplemental Nutrition Program for Women, Infants, and Children (WIC); subsidized housing; and food banks.

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

Although San Francisco’s compensation initiatives are supporting teaching staff to become more economically stable, many educators (up to 53 percent of assistant teachers and 45 percent of teachers) indicated they were worried about aspects of their financial security, with a greater proportion of assistant teachers reporting worry across items (see **Figure 8**). The concerns reported by the greatest number of teachers and assistant teachers were income stagnation (not getting a raise), having enough income to pay monthly bills, and paying for health care, which possibly indicate narrow fiscal margins for their household. Investments in San Francisco’s ECE workforce and their earnings will continue to move the needle in these areas, but it may take time for the full impact to be realized, especially given the high cost of living.

Figure 8. Economic Worry Among Center Teaching Staff, By Job Role
San Francisco SEQUAL, 2025

I worry about...



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

Opportunities for Growth and Future Investment

Increase staffing capacity.

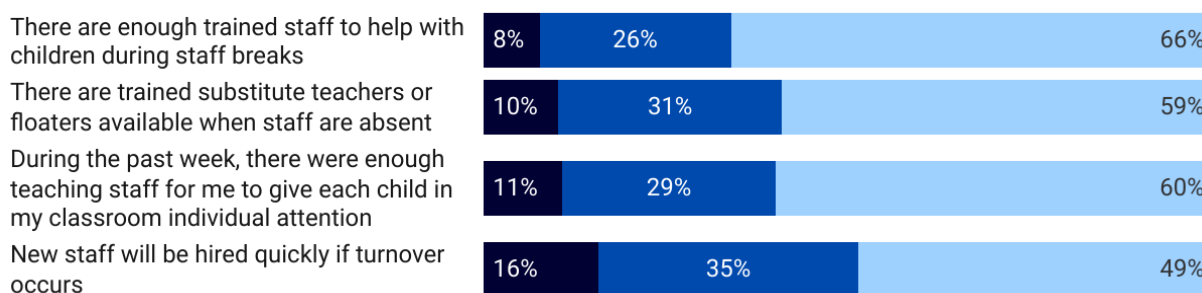
Workforce data reported by administrators indicates that the turnover rate in San Francisco was lower than the rate for early educators in California overall. The turnover rate for teachers and assistant teachers was 17 percent for both in San Francisco, and the turnover rate throughout California was 22 percent for teachers and 26 percent for assistant teachers (Powell et al., 2025a, 2025b). While lower turnover means fewer positions to fill, 45 percent of administrators indicated concern about retaining staff, and 58 percent reported concern about recruiting qualified teaching staff.

The responses of center-based teaching staff in San Francisco regarding staffing generally complemented those of administrators (see **Figure 9**). Two thirds (66 percent) of teaching staff agreed that trained staff are available to cover breaks, and 59 percent agreed there are trained substitutes to cover absences. Meanwhile, 49 percent of teaching staff seemed to recognize the challenges in quickly filling open positions.

Figure 9. Staff Availability According to Center Teaching Staff

San Francisco SEQUAL, 2025

Disagree Mixed Agree



Teachers and assistant teachers n=844-868

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

Traditionally, staffing and turnover are persistent issues within the ECE field. Although reports from administrators in San Francisco are generally encouraging, further exploration of how to create and ensure the availability of replacements can further assist in expanding and stabilizing the ECE workforce.

What Educators Say About Turnover

Teaching staff were asked to identify what they believed or knew to be reasons for recent staff turnover in their programs. The reasons most frequently noted were the high cost of housing (41 percent), low wages (31 percent), and limited benefits (21 percent).

Teaching staff were then asked what could help reduce turnover among teaching staff in their program. The improvements suggested were also economic in nature: increasing pay (71 percent); offering more benefits, like health insurance (65 percent); and offering more paid time off, such as paid vacation or sick days (64 percent). Investments that support economic stability and reduce out-of-pocket expenses—employer-offered health insurance, for example—can encourage retention and longevity within the ECE field.

Further strengthen pathways for entry and growth in the ECE field.

Early educators' responses positively reflect investments by the San Francisco Department of Early Childhood in professional development, qualification attainment (e.g., Child Development Permits, degrees), and educational support (e.g., stipends, technology, mentorship). Continued investment in programs such as Pathways and SEEPD promote access to opportunities to obtain degrees and increase permit levels by reducing the financial burden on early educators.

DEC can also further prioritize professional development related to supervision for early educators. Although teachers and assistant teachers viewed their program supervisors as knowledgeable and supportive, only one third (33 percent) of educators who supervise other teachers agreed they are well trained on how to be an effective supervisor. We recommend that DEC:

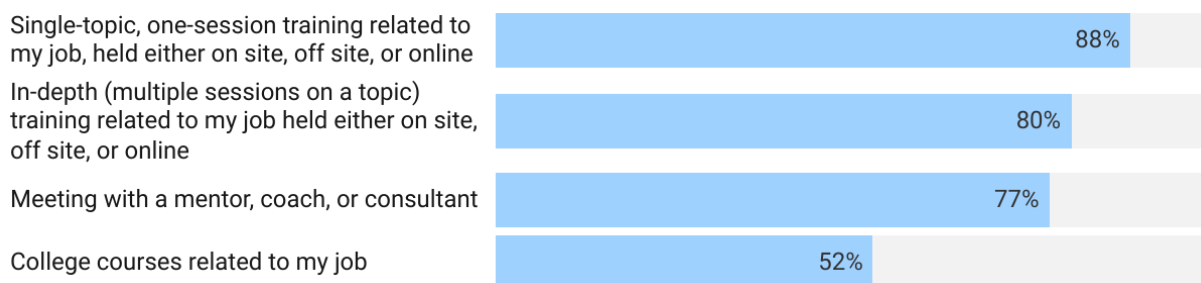
- Continue to support current supervisors and program leaders to learn management best practices and cultivate strong relationships with their teaching staff;
- Offer training to teaching staff in effective supervision practices; and
- Develop a supervision pipeline for individuals interested in becoming a supervisor and program leader.

Identify which training modalities educators prefer.

Three quarters (73 percent) of center teaching staff reported that they have a choice in which professional development to participate. Many teachers and assistant teachers likewise reported participating in a range of types of professional development (see **Figure 10**). One limitation of this study is that teaching staff were not asked about their preferred modality or timing for ongoing learning (e.g., online, in person, evenings, weekends). To increase opportunities and access, further exploration of professional development opportunities might include gathering input from teachers about their preferred modalities and any barriers that might exist to accessing trainings (e.g., language, schedule).

Figure 10. Types of Professional Development That Teaching Staff Participated in Within the Past Six Months

San Francisco SEQUAL, 2025



Teachers and assistant teachers n=771-804

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

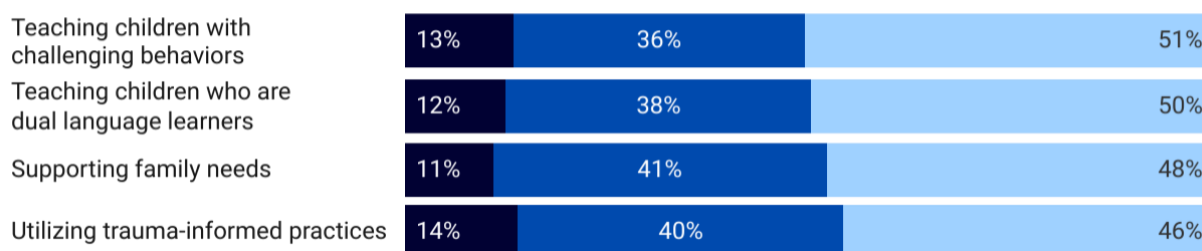
Tailor topics for professional development.

Gathering information about professional development opportunities can also include educators' perspectives about the need for future professional development content. As shown in **Figure 11**, nearly one half (46 percent to 51 percent) of center-based teaching staff reported there was sufficient training available for the topics the survey addressed. However, between 36 percent and 41 percent of teaching staff had a mixed response, and 11 percent to 14 percent disagreed, which suggests there is room to explore training topics and where topics may not be meeting teachers' needs.

Figure 11. Sufficient Training Available to Center Teaching Staff on Specific Topics

San Francisco SEQUAL, 2025

Disagree Mixed Agree



Teachers and assistant teachers n=795-808

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

Continue investing in educators' compensation and evaluating the effect of these investments.

Compensation initiatives funded by Proposition C are a recent addition to San Francisco's efforts to uplift and compensate the ECE workforce. Early educator wages in San Francisco are higher than those of their regional counterparts, and economic indicators show possible movement towards personal financial stability. With the ongoing provision of family-sustaining wages, early educator well-being will likely improve. Fortunately, in the interim, educators are able to access a plethora of social supports: 41 percent of center-based teaching staff reported some level of food insufficiency, and 40 percent said they use social safety net programs (see **Table 4**,

Center for the Study of Child Care Employment, University of California, Berkeley <https://cscce.berkeley.edu>

San Francisco Department of Early Childhood <https://sfdec.org/>

above). To understand how these investments are impacting the economic stability and well-being of early educators over time, DEC can continue to measure and monitor multiple facets of educator and programmatic well-being (e.g., personal economic well-being, retention in the field).

III. Findings: Family Child Care

Family child care (FCC) providers are a highly experienced and critical component of the ECE workforce in San Francisco. This chapter examines findings from 138 FCC providers and assistants who participated in the SEQUAL study, exploring how San Francisco can build on a strong foundation of experienced early educators while addressing operational challenges through innovation and expanded resources.

Key Strengths

Exceptional Workforce Foundation

- **74 percent** of FCC providers have 6+ years of experience in their profession.
- **83 percent** of FCC providers received specialized training for home-based care.

Able to Support Essential and Flexible Services

- Extended hours (**47-50 hours** per week)
- Nontraditional scheduling for working families
- Mixed-age programming
- Meeting the need for infant and toddler care

Opportunities for Growth and Future Investment

- Develop a substitute pool to build FCC staffing capacity.
- Expand professional development tailored to FCC providers.
- Improve access to local teaching resources for FCC providers.
- Identify and reduce barriers to utilizing community resources.

希望人們知道這工作很艱巨，需要很多耐力與愛心，但這工作很有意義。

I hope people know that this work is hard and requires a lot of endurance and love but is very meaningful.

— Small FCC Provider Respondent, San Francisco

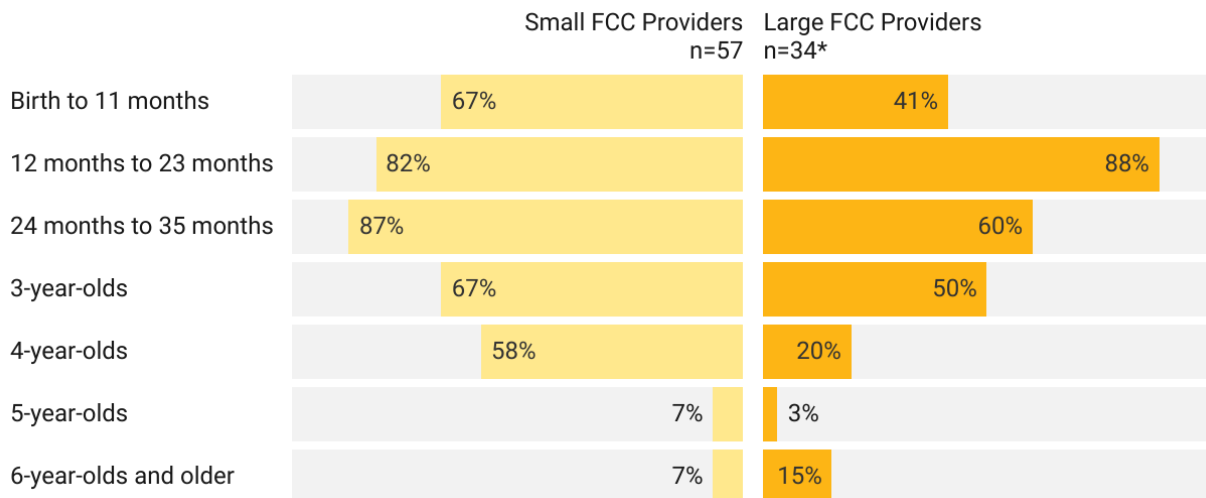
Family Child Care Program Characteristics

Family child care programs⁸ encompass home-based businesses with either a small or large license designation. Programs with a small FCC license are allowed to care for up to eight children at a time, while large licenses allow for up to 14 children. Large FCC programs often include an assistant provider. In our sample, small FCC providers reported enrolling a median of five children, and large FCC providers reported enrolling a median of 12 children.

Although FCC providers are licensed to serve children across a range of ages, the vast majority of respondents noted enrolling one- and two-year-olds, with smaller proportions caring for children birth to one year and children age three and older (see **Figure 12**). As reported earlier, most center-based programs serve children two, three, and four years of age, so FCC providers meet a critical need.

⁸ Variations by program license size are described in this report when there are notable differences. Data presented in this section primarily capture the perspectives of the FCC providers who own the business, but assistants working in FCC programs are reported separately when notable.

Figure 12. FCC Program Enrollment by Age Group, By License Size
San Francisco SEQUAL, 2025



* Interpret with caution given sample size (n<40).

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

Additionally, approximately one half (53 percent) of FCC providers reported that they had a waitlist of families needing care at the time of the survey. For providers with a waitlist, birth to 11 months and 12 months to 23 months were the predominant age groups on these lists (37 percent and 25 percent, respectively).

Family Child Care Educator Demographics

FCC providers represent a unique and essential component of the ECE system in San Francisco. These educator-entrepreneurs operate small businesses in their homes, providing high-quality education and care to children from infancy through school age. The 138 family child care providers and assistants who participated in this study have exceptional qualifications and many years of experience. They also reflect the cultural and linguistic diversity of the children and families they serve.

Our demographic findings shown in **Table 5** reflect the responses of 82 FCC providers who participated in the survey. Most FCC providers are women over 40 years of age, with the majority identifying as Asian. Due to small sample size ($n < 40$), we were unable to include FCC assistants in SEQUAL analyses.

Table 5. Characteristics of FCC Providers, By Location
San Francisco SEQUAL, 2025

	SF FCC Providers	Bay Area FCC Providers*	CA FCC Providers*
Race/Ethnicity	(n=82)	(n=586)	(n=2,404)
Asian	61%	30%	13%
Latino	26%	37%	44%
Black/White/Other	13%	33%	43%
Age	(n=82)	(n=671)	(n=2,804)
19 to 39 years	24%	42%	46%
40 years or older	76%	54%	50%
Gender	(n=82)	(n=582)	(n=2,396)
Female**	86%	97%	98%
Country of birth	(n=82)	(n=619)	(n=2,544)
United States	17%	33%	48%
Another country	77%	60%	44%
Decline to answer	6%	7%	7%
Languages Spoken	(n=82)	(n=609)	(n=2,501)
English	55%	78%	81%
Chinese	60%	12%	6%
Spanish	28%	36%	43%
Other	9%	24%	15%

Continued...

Table 5. Characteristics of FCC Providers, By Location, *Continued***San Francisco SEQUAL, 2025**

Children in Household	(n=81)	(n=582-612)	(n=2,396-2,522)
Under 5 years old	22%	19%	22%
Between 6-17 years old	37%	41%	46%

* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

** Due to sample size, we are unable to report on other genders. We gratefully acknowledge the contributions of early educators who identify as men, nonbinary, or another gender identity and recognize that the gendered oppression of women in the ECE workforce is related to the gender-based oppression of nonbinary, trans, and genderqueer educators.

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

Characteristics of Family Child Care Assistants

Three quarters (77 percent) of FCC providers across license sizes reported having staff or an assistant who helps in their program. Assistants were primarily family members (56 percent), but also included friends or neighbors (21 percent) and individuals with whom providers had no prior relationship (40 percent). Only 10 percent of FCC providers reported having a vacant assistant position, and approximately one third of providers reported that they have trouble recruiting qualified staff (34 percent of small FCC providers and 42 percent of large FCC providers) or retaining qualified staff (33 percent of small FCC providers and 33 percent of large FCC providers).

FCC assistants in San Francisco are well educated: 82 percent completed at least some college, with 42 percent earning an associate degree or higher. More than one half (57 percent) reported having no California Child Development Permit, while the remaining 43 percent held a permit at the Assistant Teacher level or higher (see **Table 6**).

Table 6. Characteristics of FCC Assistants
San Francisco SEQUAL, 2025

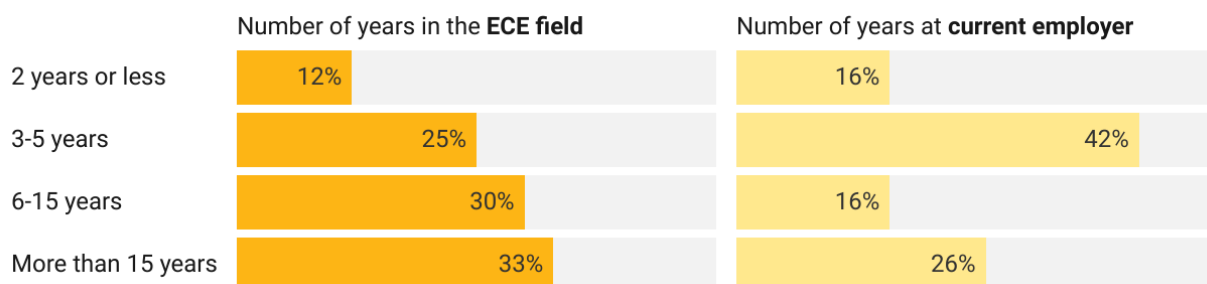
FCC Assistants	
Education	(n=35*)
High school diploma or less	17%
Some college	40%
Associate degree or higher	42%
Age	(n=43)
19 to 39 years	45%
40 years or older	55%
California Child Development Permit	(n=28*)
No Permit	57%
Assistant Teacher	22%
Associate Teacher or Higher	21%

* Interpret with caution given sample size (n<40).

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

FCC assistants are experienced early childhood professionals, with nearly two thirds (63 percent) reporting six or more years in the ECE field. Assistants also demonstrate commitment to their current employers, with 84 percent having worked with their current employer for three years or more (see **Figure 13**).

Figure 13. ECE Experience of FCC Assistants
San Francisco SEQUAL, 2025



FCC assistants n=36-37*

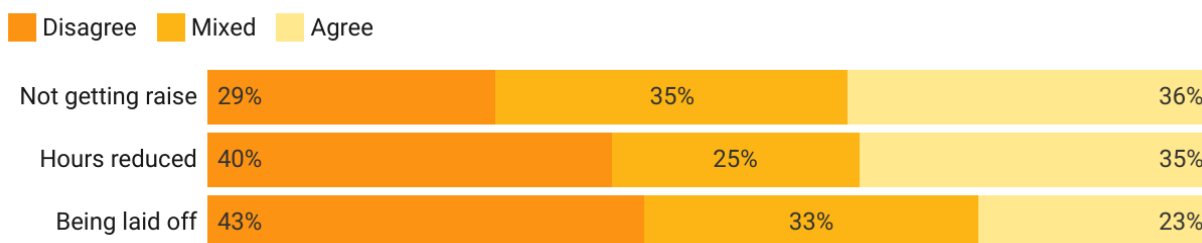
* Interpret with caution given sample size (n<40).

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

FCC assistants expressed some economic concerns related to job stability and compensation, with more than one third worried about not getting a raise (36 percent) or having their hours reduced (35 percent). Additionally, nearly one quarter (23 percent) expressed concern about being laid off (see **Figure 14**).

Figure 14. Professional Concerns Among FCC Assistants

San Francisco SEQUAL, 2025



FCC assistants n=38-43*

* Interpret with caution given sample size (n<40).

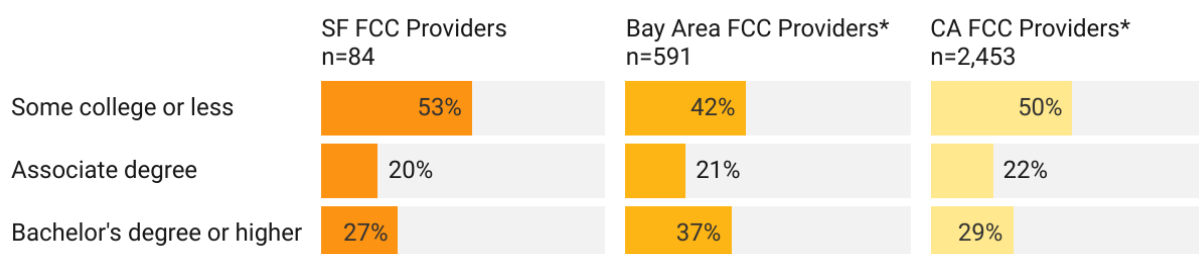
Source: Center for the Study of Child Care Employment, University of California, Berkeley

Key Strengths

FCC providers in San Francisco are highly trained and experienced.

California requires family child care providers to complete 16 hours of health and safety training and to maintain current CPR and first aid certifications. While no education beyond a high school diploma is required, 47 percent of FCC providers in our sample hold an associate degree or higher, similar to their peers across the state (see **Figure 15**).

Figure 15. Educational Attainment of FCC Providers, By Location
San Francisco SEQUAL, 2025



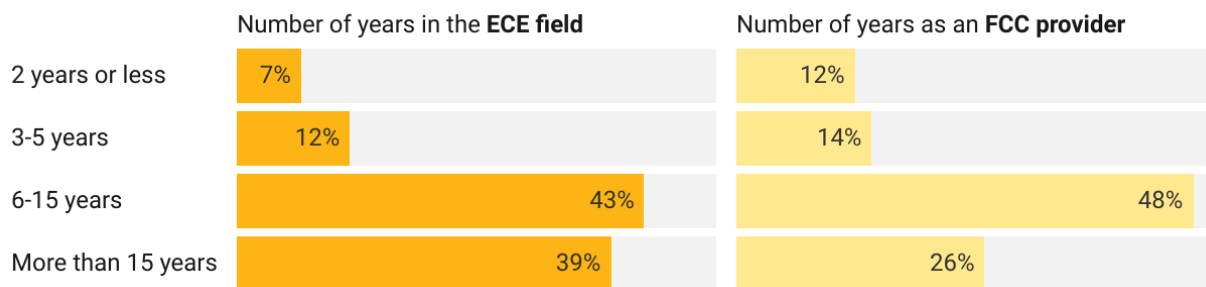
* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

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

San Francisco FCC providers also have longevity in the field, with more than 80 percent indicating six or more years of experience in early care and education and 74 percent having been an FCC provider for six or more years (see **Figure 16**).

Figure 16. ECE Experience of FCC Providers

San Francisco SEQUAL, 2025



FCC providers n=75

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

San Francisco FCC programs provide flexible care services.

Family child care providers provide flexible care arrangements that are essential to San Francisco's ECE system. FCC providers reported offering care between 47 and 50 hours per week, often caring for children during nontraditional hours, including weekends, for families with varying schedules (see **Figure 17**).

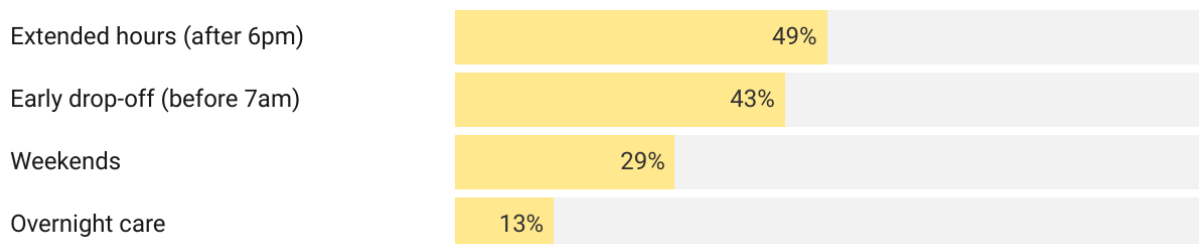
Figure 17. Flexible Care Offered by FCC Providers

San Francisco SEQUAL, 2025

Business hours (n=87)



Offers additional care (n=39*)



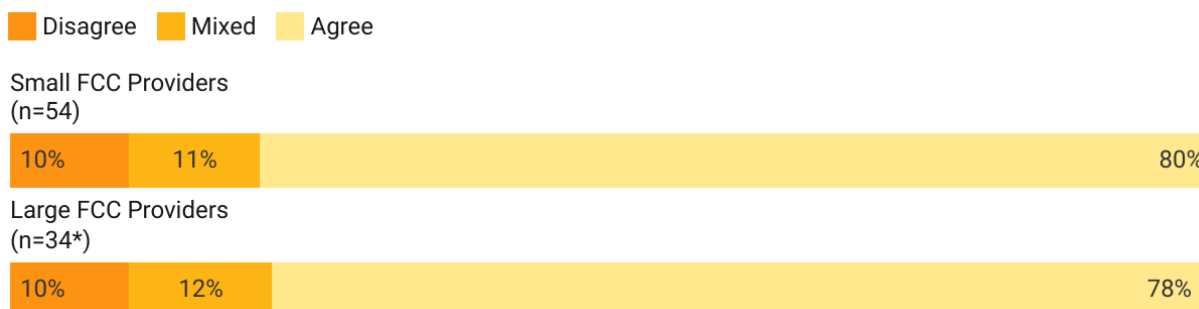
* Interpret with caution given sample size (n<40).

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

The economic well-being of FCC providers is tied to the financial health and stability of their programs.

Most FCC providers expressed concern about losing income if they become ill, with 80 percent of small FCC owners and 78 percent of large FCC owners agreeing with this statement (see **Figure 18**). This finding underscores the economic vulnerability of home-based providers, who may not have access to a substitute pool, may need to pay their day's wages to a substitute, or may even need to close their programs when they are unable to work.

Figure 18. Worry Among FCC Providers About Losing Income If Ill, By License Size
San Francisco SEQUAL, 2025



* Interpret with caution given sample size ($n < 40$).

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

Enrollment in health insurance and retirement savings are two positive indicators of economic well-being. Compared to FCC providers regionally and across the state, a larger proportion of FCC providers in San Francisco reported having retirement savings (see **Table 7**). San Francisco FCC providers reported similar levels of food sufficiency and enrollment in public assistance programs as their peers in the Bay Area and across the state. The programs most utilized are Medi-Cal for their children (24 percent) and Medicaid for themselves (13 percent).

Table 7. FCC Provider Economic Indicators

San Francisco SEQUAL, 2025

	San Francisco FCC Providers (n=62-84)	Bay Area FCC Providers* (n=476-570)	California FCC Providers* (n=2,049-2,289)
Enrolled in health insurance	94%	95%	90%
Food sufficient**	59%	62%	60%
Homeowner	54%	59%	64%
Any retirement savings	43%	35%	27%
Enrolled in public assistance***	39%	32%	41%

* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

** We use a question from the Current Population Survey [Food Security Supplement](#) about the food eaten in the household in the past 12 months and whether respondents were able to afford the food they needed. Educators who indicated they “had enough of the kinds of food [they] wanted to eat” are considered food sufficient. Other options included “enough but not always the kinds of food we wanted to eat,” “sometimes we did not have enough to eat,” and “often there was not enough to eat.”

*** Public assistance programs include: Medi-Cal; Medicaid; Medicare; CalFresh; Special Supplemental Nutrition Program for Women, Infants, and Children (WIC); subsidized housing; and food banks.

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

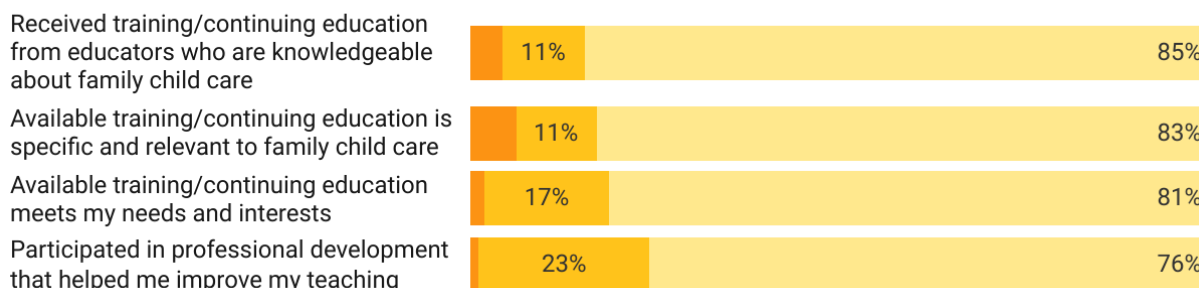
San Francisco offers a wealth of specialized training for home-based educators.

FCC providers reported actively engaging in ongoing professional learning opportunities, across multiple modalities, both online and in-person. Of note, FCC providers indicated accessing training designed specifically for their educational context, offered by individuals very familiar with home-based care. As shown in **Figure 19**, the majority (85 percent) of providers reported receiving training from instructors knowledgeable about family child care, and 83 percent participated in professional development specifically focused on the FCC context. Most FCC providers agreed that the training offered meets their needs. In addition, 76 percent of FCC providers agreed that the professional development they received helped them improve their teaching. These findings illustrate how professional development and training in San Francisco is meeting the unique needs of home-based providers.

Figure 19. FCC Provider Assessment of Available Training

San Francisco SEQUAL, 2025

Disagree Mixed Agree



FCC providers n=90-91

Note: Disagree was 4 percent, 6 percent, 2 percent, and 1 percent respectively

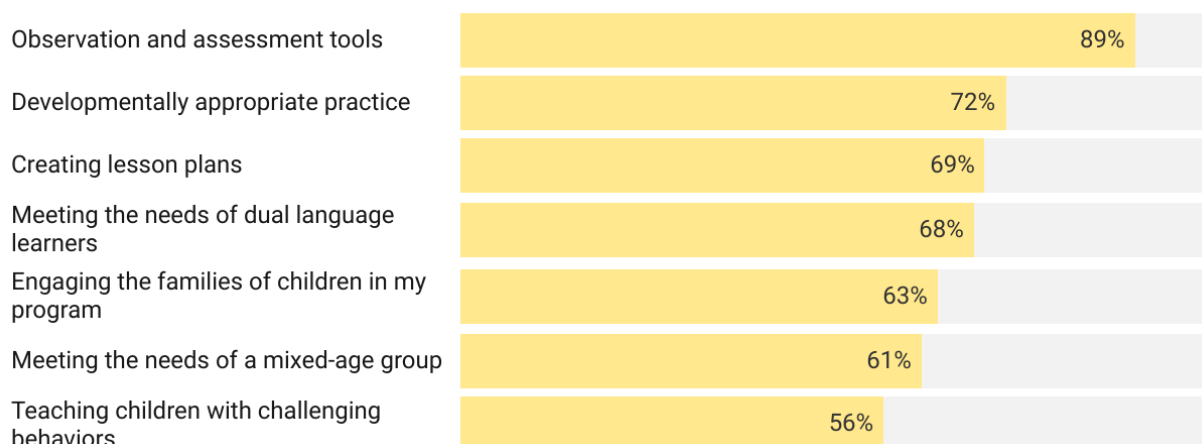
Source: Center for the Study of Child Care Employment, University of California, Berkeley

FCC providers often face the challenge of working with multiple ages, requiring them to skillfully meet each child's needs and support their development alongside children who may be much younger or much older. More than one half of FCC providers said they had received training on how to support mixed-age groups, children who are experiencing challenges or need more support, and children who are dual language learners (59 percent, 54 percent, and 68 percent, respectively, see **Figure 20**). Further

training on how to support children who display challenging behavior is increasingly requested by early educators across the United States; for examples, see news reports from California (Rafael, 2025), Colorado (Schimke, 2024), Virginia (McNeill, 2019), and Washington (Kneedler, 2023). Home-based educators in San Francisco desire this knowledge, as well.

Figure 20. Training Topics FCC Providers Have Received

San Francisco SEQUAL, 2025



FCC providers n=92

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

Investments in FCC providers' compensation positively impact their economic stability.

Compensation and Retention for Early Educators Stipend (CARES) is a stipend-based compensation program in San Francisco available to FCC programs within the Early Learning for All (ELFA) network. Stipends are awarded to eligible providers and assistants, with amounts varying based on an individual's education (degree or units), experience, California ECE permit level, and for assistants, the number of hours per week they work directly with children. Educators can apply twice a year. Stipend amounts range from \$8,000 to \$39,000 total per year for a full-time educator.

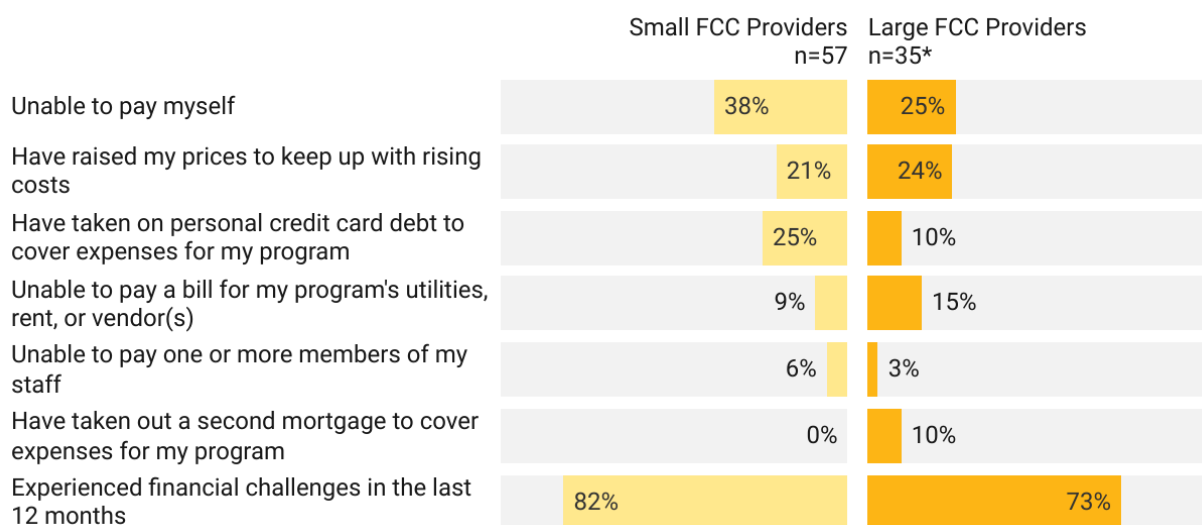
Considering the median reported CARES stipend of \$14,000 for FCC providers in our sample together with the median reported annual income of \$51,600, many FCC providers appear to receive a salary close to or exceeding a living wage in San Francisco, which is estimated to be \$60,964.80 for a single adult with no children (Living Wage Institute, 2025). The SEQUAL survey did not provide educators with explicit guidance on whether to include their CARES stipends in the calculation of their annual salary. Individuals often view stipends as supplemental income rather than a portion of their wages—similar to how lump-sum payments like the Earned Income Tax Credit are perceived as "windfall" money rather than earnings (Sykes et al., 2015)—potentially resulting in underreporting of actual compensation. Thus, we recommend interpreting these findings with caution and suggest that future research ask explicitly about program revenue, stipends, supplements, and other forms of income.

CARES recognizes the immense value of early educators, bridging a financial gap unmet by program fees, thus enabling both the retention of FCC providers in the field and their economic stability. The true impact of San Francisco's investment may be significantly greater than suggested by wage data alone. For example, only 6 percent of FCC providers in San Francisco reported currently having student loans, so it is possible that CARES stipends have allowed home-based educators to pursue educational opportunities or pay down debt.

While nearly all FCC providers reported experiencing economic challenges within the last year, the specific challenges identified may reflect temporary economic issues rather than systemic ones (see **Figure 21**). Providers may be managing variable enrollment,⁹ irregular parent payments, or seasonal fluctuations that contribute to temporary rather than persistent economic constraint.

Figure 21. Financial Challenges FCC Providers Experienced in the Past 12 Months, By License Size

San Francisco SEQUAL, 2025



* Interpret with caution given sample size (n<40).

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

⁹ For a discussion of how TK expansion is affecting child care enrollment, see Powell et al., 2025c.

Opportunities for Growth and Future Investment

Despite the substantial strengths of family child care providers and the work of the San Francisco Department of Early Childhood, family child care providers still face systemic challenges that limit their ability to thrive personally and professionally, offering DEC further opportunity to build on FCC providers' strengths and address systemic challenges.

Develop a substitute pool to build FCC staffing capacity.

In addition to the time needed for the provision of care, FCC providers require time to manage their program and attend to business operations. Calculated across all provider responses, FCC programs are open an average of 48 hours per week for care, and individual providers work an average of 54 hours each week for their business. Hours worked in addition to care often include completing paperwork, cleaning, obtaining supplies, and other activities (see **Figure 22**). Providers are juggling quite a bit professionally, with limited access to substitute care (see **Figure 23**). As a result, they may experience difficulty meeting their personal and professional needs.

Figure 22. Mean Weekly Hours Worked by FCC Providers, Paid and Unpaid
San Francisco SEQUAL, 2025

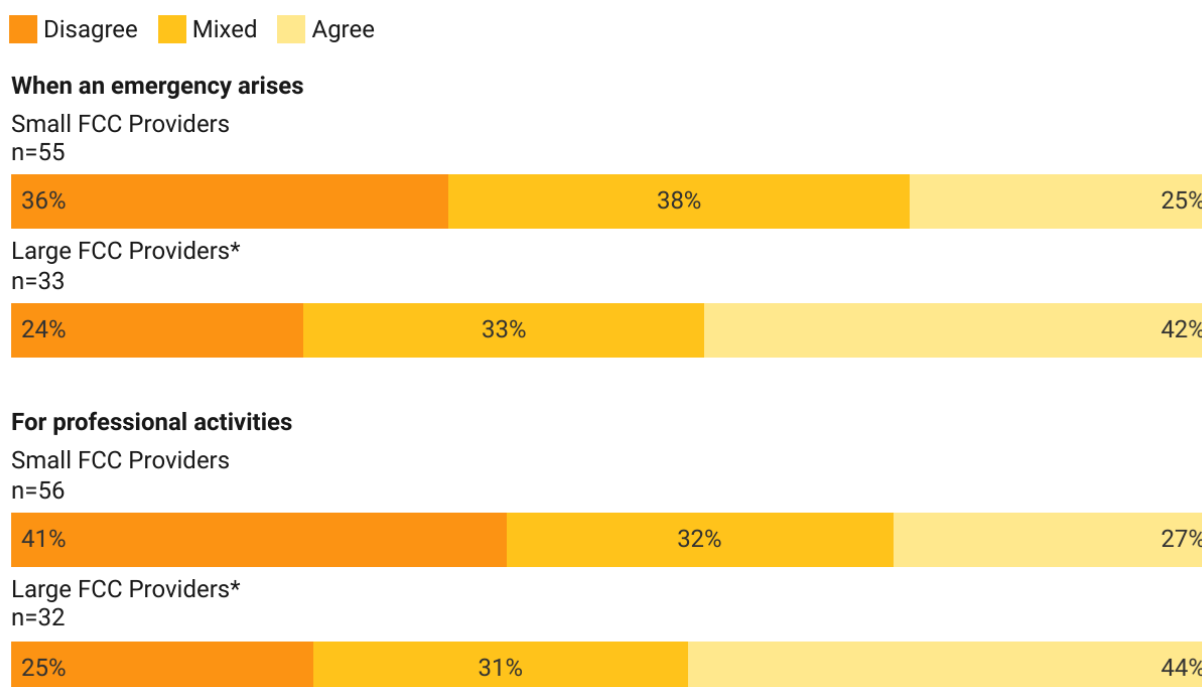


FCC providers n=80-82

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

Creating a substitute provider system specifically for FCC programs in San Francisco, subsidized by the Department of Early Childhood, would make it possible for providers to attend professional development, take necessary breaks, and maintain program operations during emergencies as well as planned absences. The pool could be designed to offer substitutes ongoing training tailored to the development, implementation, and maintenance of FCC programs and thus support the replenishment of the workforce.

Figure 23. FCC Provider Substitute Care Availability, By License Size
San Francisco SEQUAL, 2025



* Interpret with caution given sample size (n<40).

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

Expand professional development tailored to FCC providers.

Building on the foundation of specialized FCC program training that already exists in San Francisco, DEC can explore how to expand professional development for working with mixed-age groups and supporting children who are experiencing challenges or need more support.

For FCC providers, the dual role of educator and small business owner requires ongoing professional development and technical assistance specific to both distinct roles. While 77 percent of FCC providers indicated they received some business training, fewer have written budgets for their programs or had comprehensive training on business operations in the past year (50 percent and 33 percent, respectively). A smaller number of FCC providers indicated accessing services like business management tools and tax preparation assistance (14 percent) or maintenance and repair services (8 percent).

DEC can explore how to further expand professional development opportunities and develop additional business and financial training and support for FCC providers. For example, DEC can bolster financial management training or develop business planning templates that can be utilized by FCC providers. In addition to training and technical assistance, DEC could investigate other support strategies for small businesses, including the creation of group purchasing cooperatives to reduce costs or by providing technical assistance to reduce the onerous labor of maintaining compliance with regulations.

Improve access to local teaching resources for FCC providers.

In addition to training, FCC providers point to the need for other teaching supports: 47 percent of FCC providers indicated they have difficulty finding support for communication challenges with children or families and 46 percent reported difficulty finding help for trauma-related concerns (see **Figure 24**). Working with FCC providers to better understand the exact nature of these needs, San Francisco can explore strategies to expand current access to resources such as interpreters and existing connections with mental health providers and coaches.

Figure 24. Teaching Support Needs Noted by FCC Providers**San Francisco SEQUAL, 2025**

Disagree Mixed Agree

I find it difficult to plan activities for a mixed-age group of children



If I have a challenge communicating with CHILDREN or their FAMILIES, sufficient resources are available to find outside help



If a CHILD and/or FAMILY is experiencing trauma and/or adverse childhood experiences (ACEs), sufficient resources are available to find outside help



FCC providers n=87-91

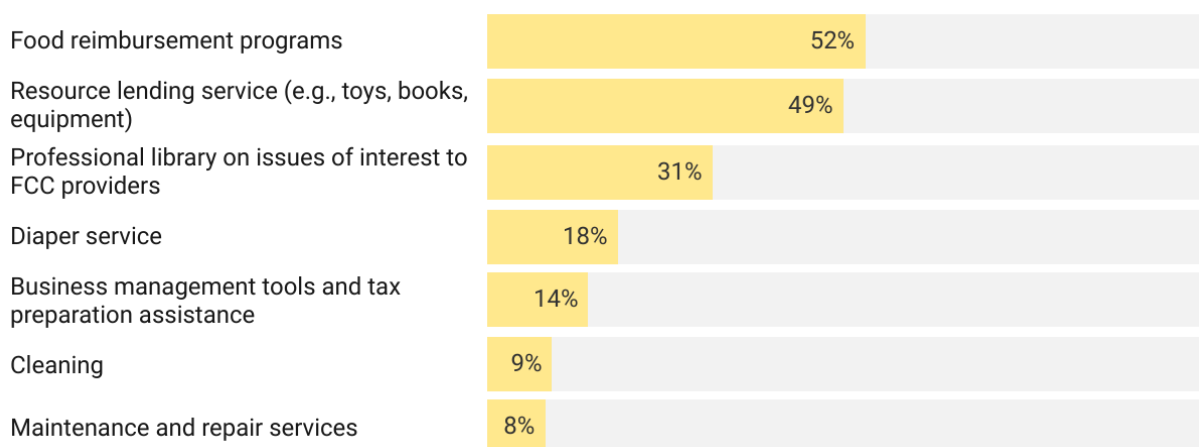
Source: Center for the Study of Child Care Employment, University of California, Berkeley

As one approach, San Francisco can conduct systematic outreach to ensure all FCC providers know about available resources, professional development opportunities, and programmatic support. While conducting outreach, DEC can work with FCC providers to understand barriers that might be inhibiting their access to and utilization of these services. With this knowledge, DEC can further develop how services, supports, and trainings are offered so that FCC providers have better access (e.g., online, in person, asynchronously, in different languages).

Identify and reduce barriers to utilizing community resources.

There are extensive programs and resources in San Francisco for supporting FCC business operations. As shown in **Figure 25**, approximately one half of FCC providers reported participating in food reimbursement programs or resource lending services.

Figure 25. Community Resources Accessed by FCC Providers
San Francisco SEQUAL, 2025

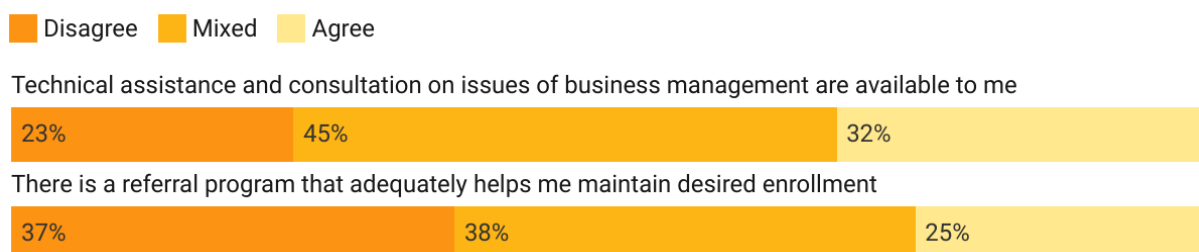


FCC providers n=92

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

Although San Francisco offers business support services to FCC providers, only one third (32 percent) of FCC providers said technical assistance for business management is available. As illustrated in **Figure 26**, the gap between actual and perceived availability may indicate further need in terms of the supports and resources offered, increasing communication to providers, and an exploration of what might inhibit providers from utilizing what is available. San Francisco can further explore potential barriers preventing FCC providers from learning about or accessing these supports.

Figure 26. FCC Providers' Knowledge of Community Resources
San Francisco SEQUAL, 2025



FCC providers n=85-87

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

IV. Conclusion

The San Francisco Department of Early Childhood has invested significantly to improve the wages and working conditions of the ECE workforce, and these investments are moving the needle on workforce well-being and retention. San Francisco's investments include two compensation programs, CARES and EESSG, as well as initiatives to support the ongoing learning and professional development of the workforce (e.g., Pathways and SEEPD) and continuous quality improvement efforts such as specialized trainings and coaching on a variety of topics for both programs and educators.

Feedback from early educators indicates that these investments are having the intended effect: improving their pay and working conditions and supporting a path to professional and personal growth. Compensation efforts appear to be strengthening economic security, allowing educators to meet their financial demands and remain in their roles, providing consistency not only for themselves, but for their programs. Educators also report a strong foundation of formal educational experiences in combination with a variety of trainings and professional development opportunities, resulting in a well-trained and responsive workforce. The recommendations in this report build on the successes already realized within San Francisco and encourage further improvements to ECE working conditions so that the impacts of current initiatives are maintained and early educators continue to receive the targeted supports and resources necessary to thrive while strengthening their skills and expertise.

By ensuring that training and professional development are responsive to the needs of the ECE workforce and the families they serve and that barriers to accessing both initial and continuing education have been removed, more educators will be enabled to grow their practice and, in the case of FCC owners, also enhance their businesses. Access to a substitute pool can provide more early educators with time to meet both personal and professional demands and commitments. Finally, further evaluation of working conditions initiatives in San Francisco can provide critical information to policymakers and other stakeholders so that they might determine how to invest so that **early care and education jobs are good jobs**.

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Appendices

Appendix A. SEQUAL

During the 1990s, Worthy Wage Campaign participants advocated for the rights of and raises for the early care and education (ECE) workforce. Part of this campaign involved envisioning a high-quality work environment where ECE jobs are good jobs. Prior to founding the Center for the Study of Child Care Employment (CSCCE), Marcy Whitebook and other Worthy Wagers founded the Center for the Child Care Workforce to gather early educators' perspectives on their ideal work environment through postcard campaigns, advocacy house parties, and other means (CSCCE & AFTEF, 2019). Members of the Center for the Child Care Workforce compiled and condensed educators' responses into a comprehensive list of standards that depict the ideal working conditions for early educators. The [Model Work Standards](#) is a comprehensive list of standards that home- and center-based educators need to be able to effectively provide high-quality care without sacrificing their well-being or the well-being of their families.

Shortly thereafter, implementation of Quality Rating and Improvement Systems (QRIS) started up throughout the United States in the early 2000s. These systems did not often prioritize the working conditions of early educators (Schlieber & McLean, 2020). While there was some agreement among policymakers and advocates that early educators' working conditions needed improvement, lack of data made it difficult to understand actual conditions.

Furthermore, while most measures of early learning environments rely on data reported from program directors and administrators, CSCCE believed that understanding working conditions could only come from centering educators' voices and experiences. Educators' views on their work environments are essential to shaping policy and practice recommendations to improve program quality, child outcomes, and early educators' own well-being (ILO, 2013). To capture early educators' assessment of their work environments and to support the inclusion of educators' perspectives into quality improvement strategies, CSCCE drew upon the Model Work Standards and other environmental measures and standards in ECE to develop the Supportive Environmental Quality Underlying Adult Learning survey, or SEQUAL (Whitebook et al., 2022).

There are two versions of the tool: SEQUAL for center-based teaching staff¹⁰ and SEQUAL for family child care (FCC) providers. While both surveys cover many of the same areas, the context for care impacts how those topics are defined and experienced by educators. Thus, topics and questions on the FCC provider survey are not directly comparable to those on the center-based measure. There is also an additional companion survey for center-based program leaders that captures program information to contextualize teaching staff responses.¹¹ These contextualizing questions are also included on the FCC provider survey because these home-based providers are both administrators and educators.

¹⁰ SEQUAL for center-based teaching staff is a validated measure that has been used in ECE workforce studies throughout the United States (e.g., New York, Florida, Oregon).

¹¹ The companion survey for center-based administrators does not contain SEQUAL items given that these questions were developed for and with educators who provide direct services.

Appendix B. Study Design

Researchers utilized a near census design, inviting all early educators for whom contact information was available to complete the survey. Contact information was gathered from project partners, the San Francisco Department of Early Childhood, and the California ECE Workforce Registry. Early Learning for All (ELFA) programs that receive Compensation and Retention for Early Educators Stipend (CARES) and/or Early Educator Salary Support Grant (EESSG) funds are required to maintain registry profiles. Educators outside of ELFA sites are not required to have registry profiles, thus the contact information obtained likely overrepresents educators working at ELFA sites. To reach educators who do not participate in ELFA, CARES, or EESSG programs, researchers circulated a flyer with a QR Code potential participants could use to opt in to the study. Local organizations, including resource and referral agencies along with two local educator organizations—Early Care Educators of San Francisco and Family Child Care Association of San Francisco—also conducted outreach within the community.

Data Collection Procedures

Between January and March 2025, researchers from CSCCE invited center-based teaching staff (lead teachers and assistant teachers) and home-based educators (FCC providers and assistants) in San Francisco to complete an online SEQUAL survey. Questions related to SEQUAL topic areas, organized as “domains” and “dimensions,” were offered as a series of statements for respondents to agree with on a six-point scale, with one (1) being “strongly disagree” and six (6) “strongly agree.” The statements were designed so that greater agreement indicated a stronger presence of the item in the educator’s environment and, therefore, greater satisfaction with their working conditions.

Because the difference between strong and regular agreement is difficult to quantify, in this report our category of “agree” combines “strongly agree” and “agree” responses, while “disagree” combines “strongly disagree” and “disagree” responses. The middle categories “somewhat agree” and “somewhat disagree” have been combined into a single “mixed response” category to capture responses that indicate partial, inconsistent, or conditional agreement with survey items. This abbreviated scale eases interpretation of the findings as well as derivation of recommendations.

Survey participants were also given the option “decline to answer.” Participants might decline to answer for a variety of reasons, for example, they may not wish to divulge that information, the item might not be applicable to them, or they may not understand the question. It is therefore difficult to interpret the meaning of a declined response.

The survey also included questions to capture educators’ demographic backgrounds, educational preparation, and tenure in the field. Program leaders (e.g., center directors, assistant directors, supervisors, teacher-directors) completed the companion survey, providing program information that included descriptions of the teaching staff working in their program, children served, and program characteristics, along with information about their own demographics, professional background, and current job role.

Appendix C. Center-Based Program Findings

Educator Demographics

Table C1. Household Composition of Center Teaching Staff, By Location
San Francisco SEQUAL, 2025

	SF Center Teaching Staff	Bay Area Center Teaching Staff*	CA Center Teaching Staff*
	(n=679-743)	(n=1,274-1,389)	(n=3,583-3,819)
Married or living with a partner	68%	61%	58%
Children under age 5 in household	11%	21%	21%
Children age 6 to 17 in household	4%	39%	39%

* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

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

Education and Experience

Table C2. Educational Attainment of Center Teaching Staff, By Job Role
San Francisco SEQUAL, 2025

	SF Center Directors	SF Center Teachers	SF Center Assistants
Educational Attainment	(n=68)	(n=395)	(n=312)
High school diploma or less	0%	3%	23%
Some college	0%	14%	32%
Associate degree	9%	23%	28%
Bachelor's degree	41%	44%	16%
Graduate degree	50%	16%	1%
Common Majors*	(n=68)	(n=310)	(n=128)
Early Childhood Education	40%	40%	37%
Child Development	13%	30%	40%

*Among holders of an associate degree or higher.

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

Table C3. Child Development Permit Levels of Center Teaching Staff, By Job Role
San Francisco SEQUAL, 2025

	SF Center Directors	SF Center Teachers	SF Center Assistants
Child Development Permit Level	(n=69)	(n=396)	(n=312)
No permit	10%	11%	12%
Assistant Teacher	0%	2%	28%
Associate Teacher	0%	6%	17%
Teacher	1%	21%	25%
Master Teacher	0%	4%	3%
Site Supervisor	23%	47%	13%
Director	64%	9%	2%

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

Table C4. ECE Experience of Center Teaching Staff, By Job Role
San Francisco SEQUAL, 2025

	SF Center Teachers	SF Center Assistants
Number of Years in the ECE Field	(n=408)	(n=335)
2 years or less	5%	13%
3-5 years	15%	20%
6-15 years	47%	34%
More than 15 years	33%	33%
Number of Years at Current Place of Employment	(n=408)	(n=335)
2 years or less	27%	25%
3-5 years	21%	24%
6-15 years	34%	25%
More than 15 years	17%	26%
Number of Years in Current Position	(n=408)	(n=335)
2 years or less	35%	30%
3-5 years	21%	21%
6-15 years	25%	22%
More than 15 years	19%	27%

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

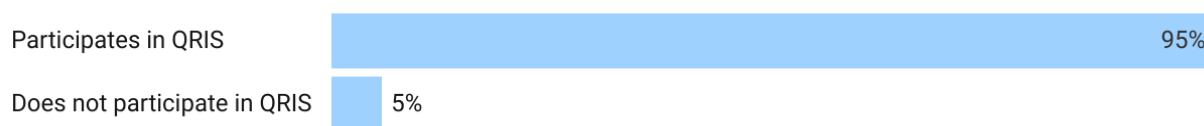
Center Program Characteristics

Table C5. Types of Funding Center-Based Programs Receive
San Francisco SEQUAL, 2025

Center-Based Programs	
	(n=69)
Parent tuition or fees	51%
Head Start, Early Head Start, or Migrant and seasonal Head Start	25%
California State Preschool (CSPP) or another Title 5 contract	52%
Vouchers or child care subsidy (e.g., CalWORKs)	54%
SF Early Learning for All (ELFA)	65%
SF Early Educator Salary Support Grant (EESSG)	52%

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

Figure C1. Centers Participating in Quality Rating Improvement System (QRIS)
San Francisco SEQUAL, 2025



Directors n=56

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

Domain 1: Teaching Supports

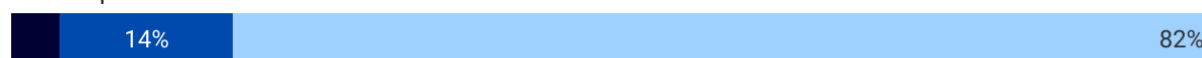
Figure C2. Support Services for Center Teaching Staff

San Francisco SEQUAL, 2025

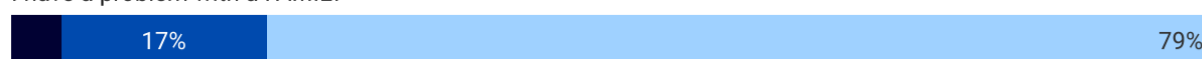
Disagree Mixed Agree

I can rely on my supervisors or other co-workers for help if...

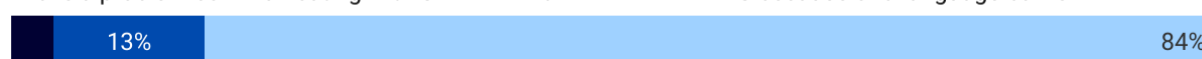
I have a problem with a CHILD



I have a problem with a FAMILY

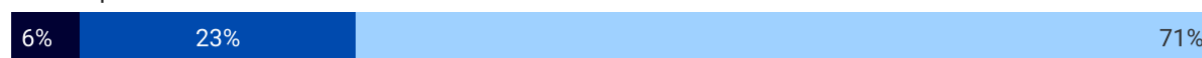


I have a problem communicating with CHILDREN OR THEIR FAMILIES because of a language barrier



Sufficient resources are available to find outside help (e.g., consultant or referral agency) if...

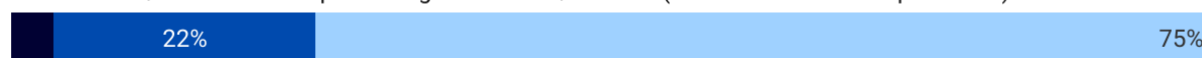
I have a problem with a CHILD



I have a problem with a FAMILY



A CHILD and/or FAMILY is experiencing trauma and/or ACEs (adverse childhood experiences)



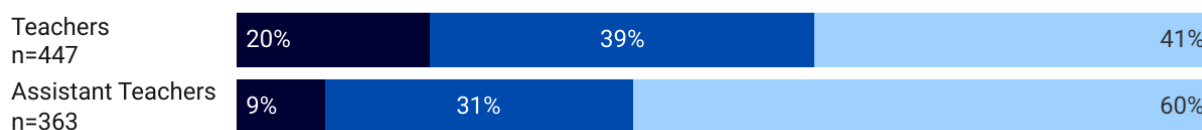
Teachers and assistant teachers n=728-741

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

Figure C3. New Staff Will Be Hired Quickly If Turnover Occurs, By Job Role

San Francisco SEQUAL, 2025

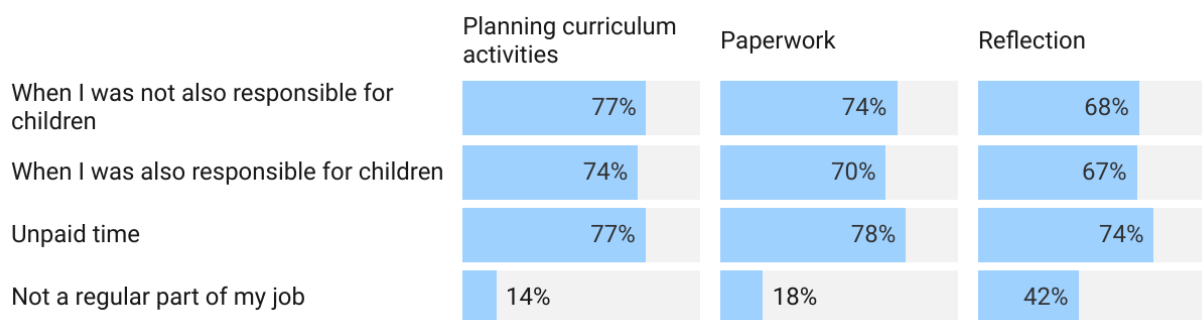
Disagree Mixed Agree



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

Figure C4. Timing for Center Teaching Staff Completion of Select Professional Responsibilities

San Francisco SEQUAL, 2025

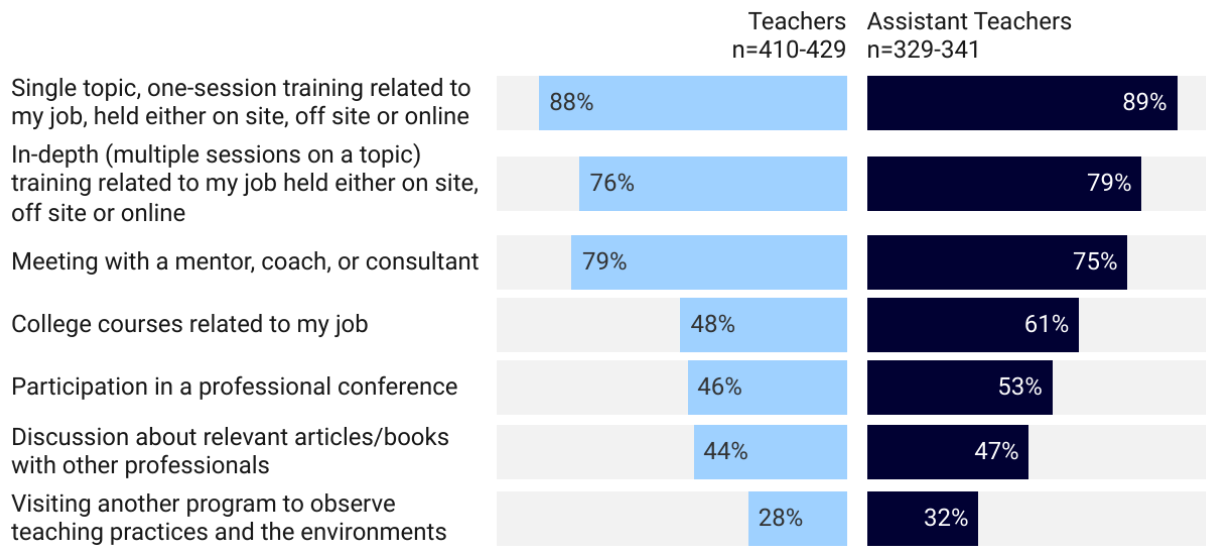


Teachers and assistant teachers n=755

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

Domain 2: Learning Community

Figure C5. Types of Professional Development That Center Teaching Staff Participated in Within the Past Six Months, By Job Role
San Francisco SEQUAL, 2025



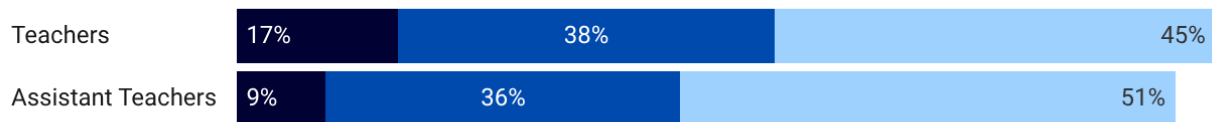
Source: Center for the Study of Child Care Employment, University of California, Berkeley

Figure C6. Sufficient Training Available to Center Teaching Staff on Specific Topics, By Job Role

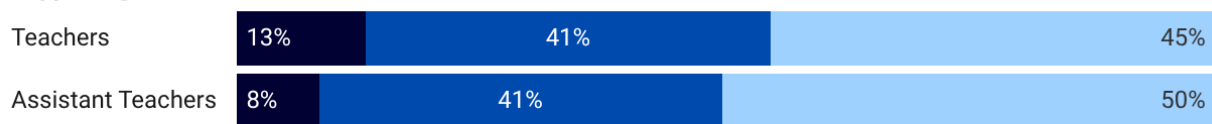
San Francisco SEQUAL, 2025

Disagree Mixed Agree

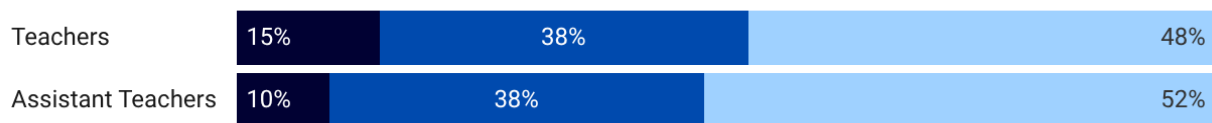
Teaching CHILDREN with challenging behaviors



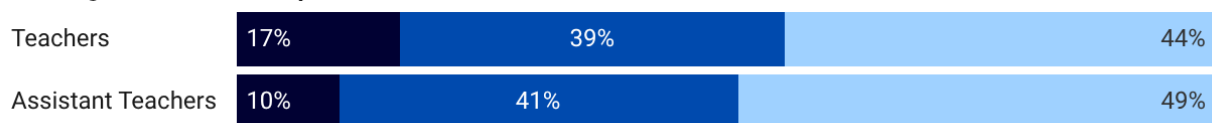
Supporting FAMILY needs



Teaching CHILDREN who are dual language learners



Utilizing trauma-informed practices



Teachers n=424-428

Assistant teachers n=343-350

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

Figure C7. Impact of Staffing on Trying New Ways to Teach

San Francisco SEQUAL, 2025

Disagree
 Mixed
 Agree



Teachers and assistant teachers n=776-770

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

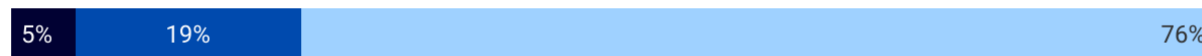
Domain 3: Job Crafting**Figure C8. Center Teaching Staff Assessment of Classroom Decision Making, By Job Role**

San Francisco SEQUAL, 2025

Disagree
 Mixed
 Agree

I can make changes to planned activities when I think it is needed

Teachers



Assistant teachers

**I can decide when outside visitors (other than families) may observe in my classroom**

Teachers



Assistant teachers



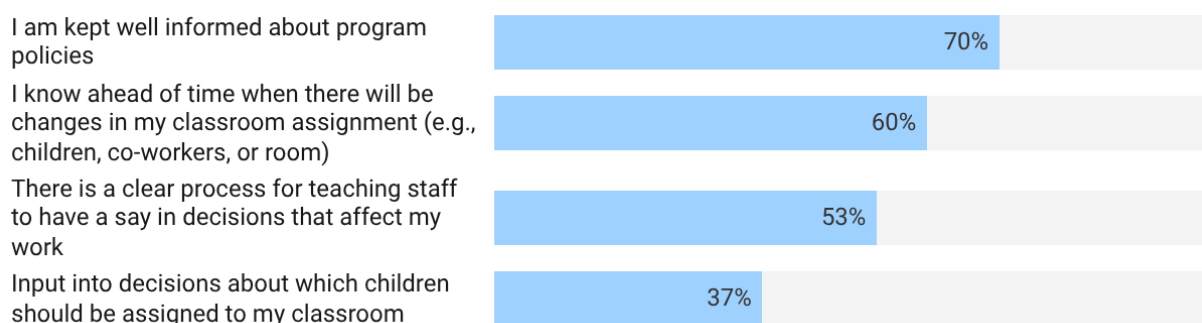
Teachers n=379-412

Assistant teachers n=233-255

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

Figure C9. Center Teaching Staff Assessment of Input

San Francisco SEQUAL, 2025



Teachers and assistant teachers n=711-794

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

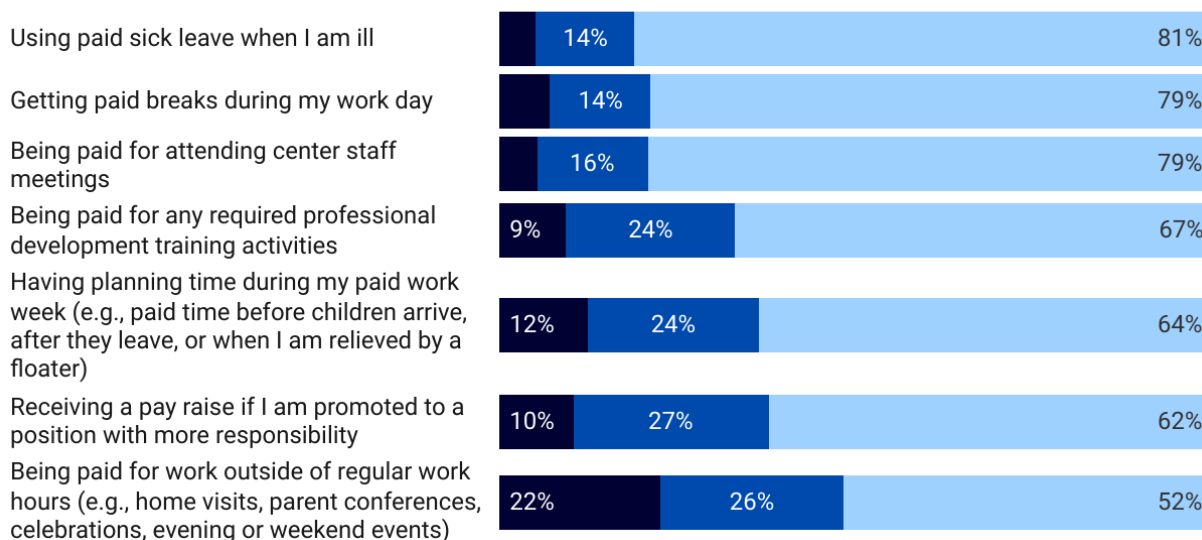
Domain 4: Adult Well-Being

Figure C10. Reliability of Compensation Policies for Center Teaching Staff

San Francisco SEQUAL, 2025

I can depend on...

Disagree Mixed Agree



Teachers and assistant teachers n=718-802

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

Figure C11. Median Hourly Wages for Center Teaching Staff, By Job Role and Location
San Francisco SEQUAL, 2025

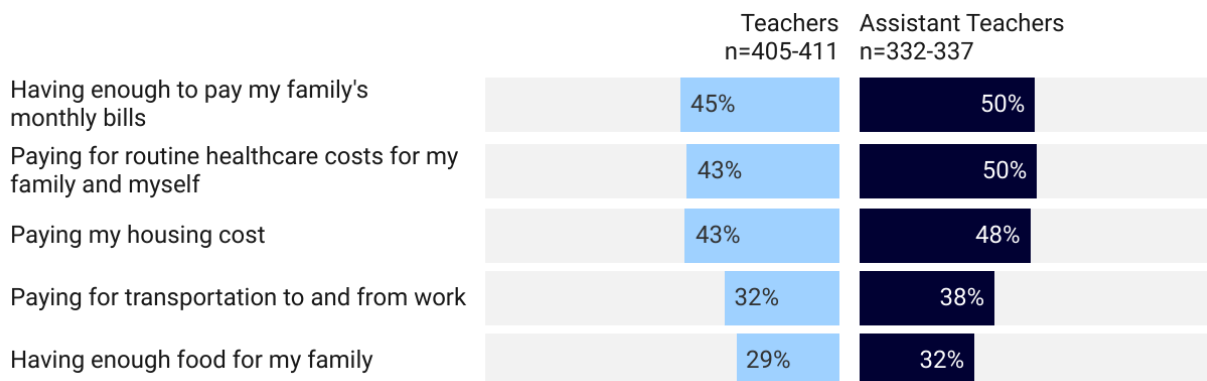


* Data from the 2020 California Workforce Study which includes approximately 2,500 center-based teachers and assistants (Kim et al., 2022).

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

Figure C12. Personal Economic Worry Among Center Teaching Staff, By Job Role
San Francisco SEQUAL, 2025

I worry about...



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

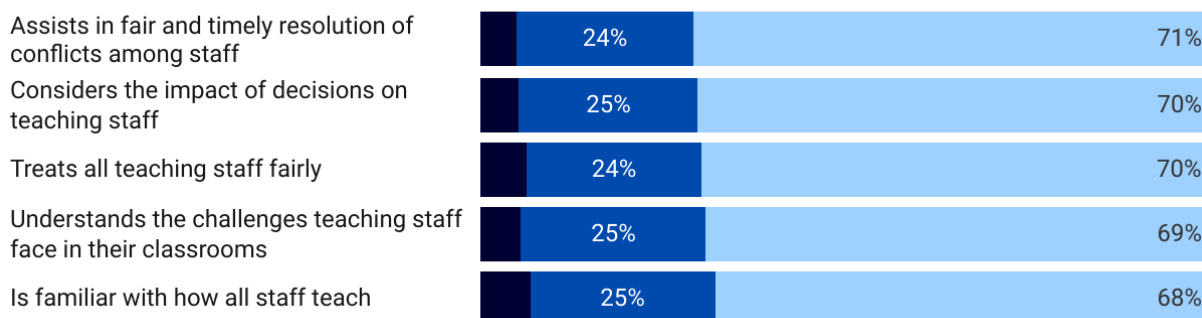
Domain 5: Program Leadership

Figure C13. Center Teaching Staff Assessment of Leadership

San Francisco SEQUAL, 2025

The leader at my center...

Disagree Mixed Agree



Teachers and assistant teachers n=710-720

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

Appendix D. Family Child Care Program Findings

Educator Demographics

Table D1. Household Composition of FCC Providers, By Location

San Francisco SEQUAL, 2025

	SF FCC Providers	Bay Area, CA FCC Providers*	CA FCC Providers*
	(n=80)	(n=582-612)	(n=2,396-2,522)
Married or living with a partner	71%	74%	70%
Children age 5 in household	21%	19%	22%
Children age 6 to 17 in household	37%	41%	46%

* Data from the 2025 California Workforce Study (Powell et al., 2025a, 2025b).

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

Education and Experience

Table D2. Educational Attainment of FCC Educators, By Job Role and License Size

San Francisco SEQUAL, 2025

	SF Small FCC Providers	SF Large FCC Providers	SF FCC Assistants
Educational Attainment	(n=45)	(n=28)**	(n=35)**
Some college or less	51%	37%	58%
Associate degree	33%	19%	8%
Bachelor's degree or higher	16%	44%	34%
Common Majors*	(n=40)	(n=25)**	(n=22)**
Early Childhood Education	33%	21%	14%
Child Development	27%	25%	14%

*Among holders of an associate degree or higher.

** Interpret with caution given sample size (n<40).

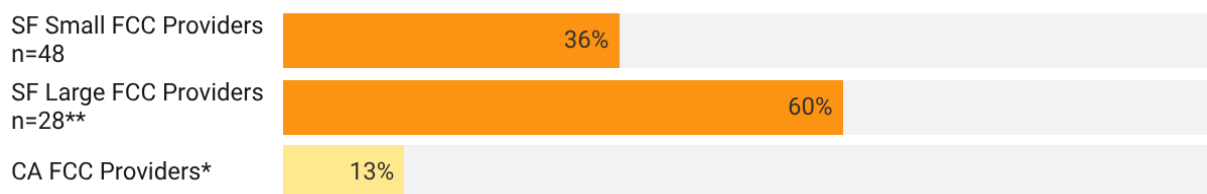
Source: Center for the Study of Child Care Employment, University of California, Berkeley

Table D3. Child Development Permit Levels of FCC Educators, By Job Role and License Size**San Francisco SEQUAL, 2025**

	Small FCC Providers	Large FCC Providers	FCC Assistants
Child Development Permit Level	(n=49)	(n=25)*	(n=28)*
No permit	18%	11%	57%
Assistant Teacher	28%	14%	22%
Associate Teacher	18%	14%	8%
Teacher	10%	7%	5%
Master Teacher	0%	3%	0%
Site Supervisor	19%	24%	8%
Director	7%	26%	0%

* Interpret with caution given sample size (n<40).

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

Figure D1. Child Development Permit at the Teacher Level or Higher for FCC Providers, By Job Role, Location, and License Size**San Francisco SEQUAL, 2025**

Small FCC providers n=48

Large FCC providers n=28**

* Data from the 2020 California Workforce Study (Powell et al., 2022).

** Interpret with caution given sample size (n<40).

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

Table D4. FCC Educator Tenure in the ECE Field, By Job Role
San Francisco SEQUAL, 2025

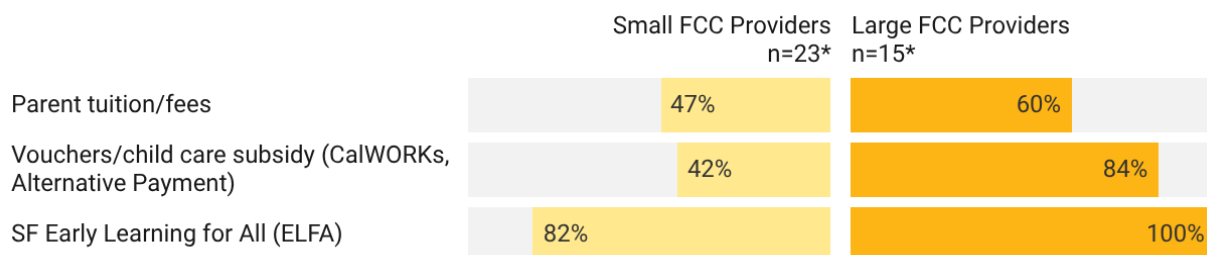
	FCC Providers	FCC Assistants
Number of years in the ECE field	(n=75)	(n=31)*
2 years or less	7%	18%
3-5 years	12%	22%
6-15 years	43%	45%
More than 15 years	39%	15%
Number of years in FCC	(n=75)	(n=31)*
2 years or less	12%	18%
3-5 years	14%	22%
6-15 years	48%	45%
More than 15 years	26%	15%

* Interpret with caution given sample size (n<40).

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

Family Child Care Program Characteristics

Figure D2. Types of Funding FCC Programs Receive, By License Size
San Francisco SEQUAL, 2025



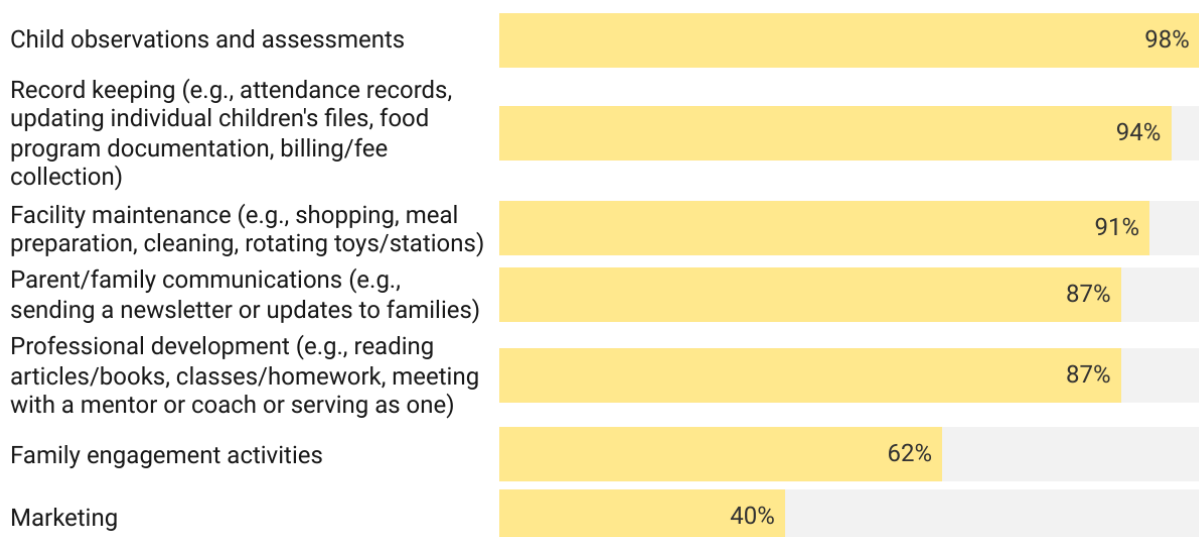
* Interpret with extreme caution given sample size (n<30).

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

Domain 2: Business Practice Supports

Figure D3. FCC Provider Weekly Program Responsibilities

San Francisco SEQUAL, 2025



FCC providers n=80

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

Domain 3: Learning Community

Figure D4. FCC Provider Choice in and Access to Professional Development, By License Size

San Francisco SEQUAL, 2025

Disagree Mixed Agree

Over the past year, I have had a choice in the professional development in which I participated (i.e., not all training was mandated by regulations)

Small FCC Providers

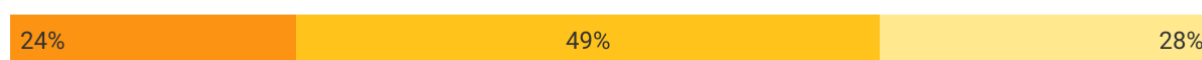


Large FCC Providers*



Over the past year, I have had sufficient opportunities to network with other early childhood educators as part of a professional association, support group, or other early childhood organization

Small FCC Providers

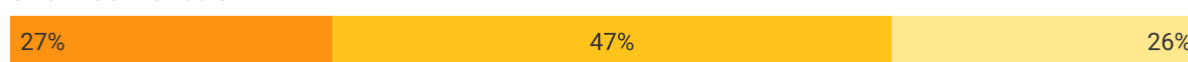


Large FCC Providers*



My program budget allocates an annual fund for professional development expenses, sufficient to cover the cost of training and related expenses (e.g., fees, tuition, substitute provider)

Small FCC Providers



Large FCC Providers*



Small FCC providers n=52-54

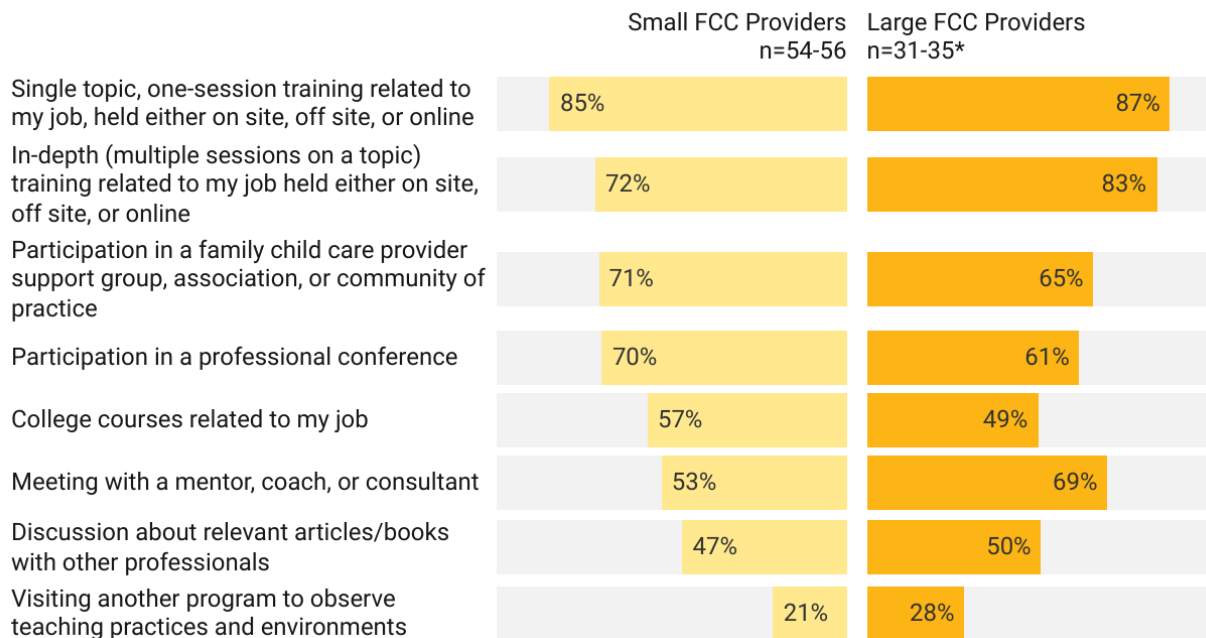
Large FCC providers n=31-33

* Interpret with caution given sample size (n<40).

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

Figure D5. Types of Professional Development That FCC Providers Participated in Within the Past Year, By License Size

San Francisco SEQUAL, 2025



* Interpret with caution given sample size (n<40).

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

Figure D6. FCC Provider Perception of Creating Environments to Support Children's Learning, By License Size

San Francisco SEQUAL, 2025

Disagree Mixed Agree

I am able to provide enough materials and equipment to create a stimulating learning environment for all children in my program

Small FCC Providers



Large FCC Providers*



I find it difficult to plan activities for a mixed-age group of children

Small FCC Providers



Large FCC Providers*



I can afford to repair or replace equipment and materials as quickly as needed

Small FCC Providers



Large FCC Providers*



Small FCC providers n=49

Large FCC providers n=26

* Interpret with extreme caution given sample size (n<30).

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

Domain 4: Adult Well-Being

Figure D7. FCC Provider Home Ownership, By License Size
San Francisco SEQUAL, 2025

■ I own my home ■ I rent my home



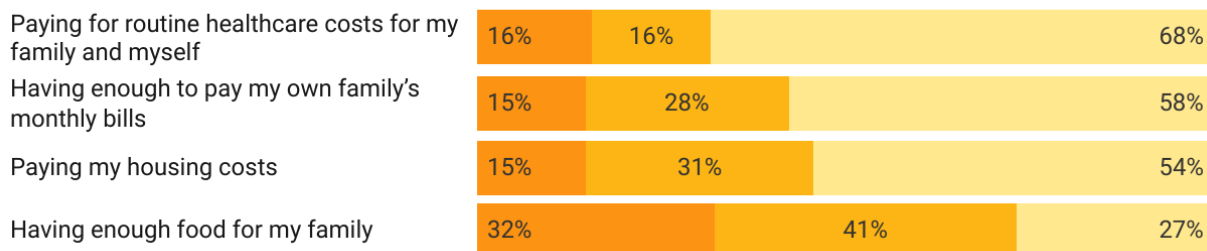
* Interpret with extreme caution given sample size (n<30).

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

Figure D8. Personal Economic Worry Among FCC Providers
San Francisco SEQUAL, 2025

I worry about...

■ Disagree ■ Mixed ■ Agree



FCC providers n=88-89

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

Figure D9. FCC Providers Agree That Program Fees Cover Their Needs, By License Size
San Francisco SEQUAL, 2025

Disagree Mixed Agree

Fees charged guarantee an income that supports me and my family

Small FCC Providers

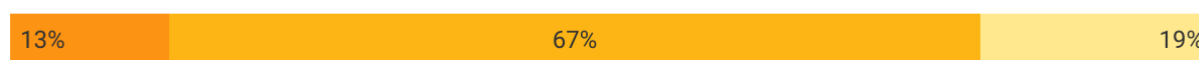


Large FCC Providers*



Fees charged allow for the purchase of healthcare benefits to support my continued work in family child care

Small FCC Providers



Large FCC Providers*



Small FCC providers n=50-51

Large FCC providers n=34

* Interpret with caution given sample size (n<40).

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

Domain 5: Program Leadership and Management

Figure D10. Community Resources Utilized by FCC Providers, By License Size
San Francisco SEQUAL, 2025

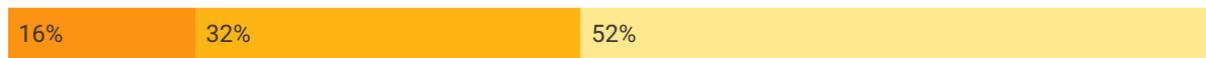
Disagree Mixed Agree

I have been trained on how to create a budget and use it to set program priorities

Small FCC Providers



Large FCC Providers*



There is a referral program that adequately helps me maintain desired enrollment

Small FCC Providers



Large FCC Providers*



Technical assistance and consultation on issues of business management are available to me

Small FCC Providers



Large FCC Providers*

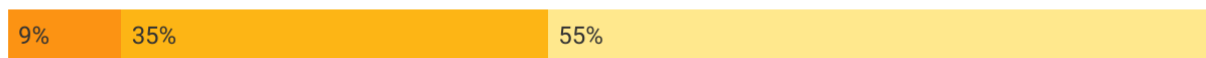


Tax preparation support is available to help maximize business deductions when I file my annual tax return

Small FCC Providers



Large FCC Providers*



Small FCC providers n=53-54

Large FCC providers n=31-33

* Interpret with caution given sample size (n<40).

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

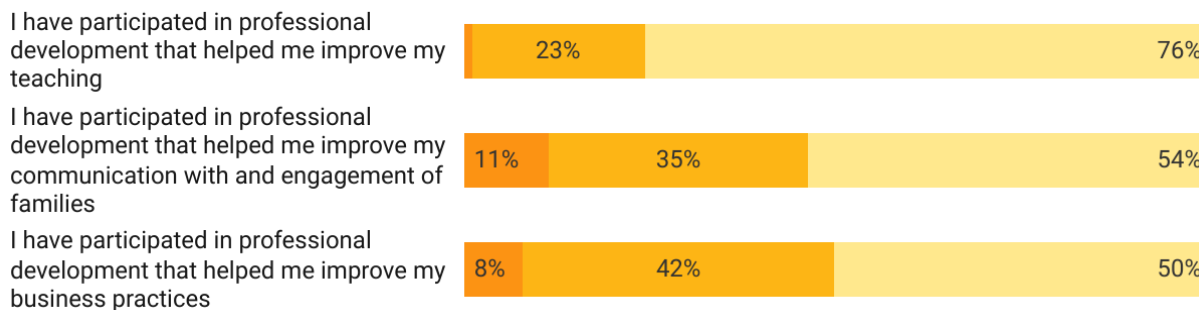
Center for the Study of Child Care Employment, University of California, Berkeley <https://cscce.berkeley.edu>

San Francisco Department of Early Childhood <https://sfdec.org/>

Figure D11. FCC Provider Professional Development Participation in the Past Year, Select Topics

San Francisco SEQUAL, 2025

Disagree Mixed Agree



FCC providers n=88-90

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