

BAY AREA JOBS FIRST COLLABORATIVE

Early Care & Education Sector Proposed Activation Plan

September 30, 2026

Version 3.0



Image credits: Top -SquareCare Oakland. Bottom - Low Income Investment Fund.

Prepared for:

BAY AREA JOBS FIRST COLLABORATIVE
In Partnership with CALIFORNIA JOBS FIRST

Prepared by:

BAM Consulting

CSCCE Center for the Study of Child Care Employment 25 years

SARAH KINAHAN CONSULTING

PARENT VOICES

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BAY AREA JOBS FIRST OVERVIEW

In 2021, Governor Newsom launched the $600 million Regional Investment Initiative (formerly known as the Community Economic Resilience Fund, or CERF) to support California's 13 regions to create quality jobs and bolster their resilience to climate and global challenges impacting the state's diverse regional economies. As part of this program, each of the 13 regions has built a California Jobs First Collaborative tasked with developing a clear vision for their region's economic future.

California Jobs First will support high-road economic development plans to create equitable access to quality jobs. High-road economic development supports environmentally sustainable businesses that pay living wages and create opportunities for career growth. As California recovers from the economic distress of COVID-19, California Jobs First aims to ensure that the state's economy works for all California residents, particularly those who have historically been marginalized.

In the Bay Area and 12 other regions in California, organizations have come together to create the Bay Area Jobs First Collaborative (BAJFC) - formerly High Road Transition Collaborative - that include balanced representation from workforce, community, labor, business, government, economic development, education, philanthropy, and indigenous communities. All Home serves as the Regional Convener for the Bay Area Jobs First Collaborative. The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards and regional workforce planning units across the nine-county Bay Area region, serves as the Fiscal Agent, with the San Francisco Office of Economic and Workforce Development (SFOEWD) as the Fiscal Lead.



The Bay Area includes the nine counties of Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma.

The Bay Area Jobs First vision is to re-envision regional economic development planning, centered around the values of equity, high-road employment, sustainability and climate resilience, and shaped by workers and impacted community members themselves. To achieve this mission, the Collaborative relies on the following guiding principles:

1. Climate Resilience Led by Frontline Communities and Workers
2. Lift Up Job Quality, Grow High-Road Jobs, Elevate Racial Equity and Worker Voice
3. Honor Local Without Losing the Power of the Region
4. Inclusive, Democratic, Grassroots Governance
5. Take Action Towards Transformational Change

In February 2025, the California Governor's Office of Business and Economic Development (GO-Biz) and the California Labor and Workforce Development Agency (LWDA) released a 10-year economic development strategy that builds on regional priorities, with a specific emphasis on manufacturing. In March 2025, the state brought together nine state agencies to form the California Jobs First Council. The State Economic Blueprint will strive to achieve the following four goals:

- Support sustainable & equitable growth across regions & populations
- Invest in the workforce for the sectors of the future
- Create an attractive environment for and with job creators
- Strengthen California's innovation economy & entrepreneurial culture



Across the State's 13 Jobs First Regional Collaboratives, the Blueprint lifts up 13 "strategic sectors" for focused effort and resources. Additionally, the Blueprint highlights eight "anchors" that are critical for supporting and sustaining regional economies and local communities: education, healthcare, housing, child care, and critical infrastructure, including transmission and distribution, water, transportation, and broadband.

INTRODUCTION AND BACKGROUND

What: This is a plan to transform Early Care and Education (ECE) into the public good that it is. We seek to create ECE jobs into high-road opportunities for marginalized workers, including workers without a college degree and to uphold the Bay Area's commitment to supporting working families with accessible and quality child care options that align with their budget and work schedules.

Why: When families have access to affordable and high-quality care, children experience leaps and bounds of growth, parents maintain steady jobs and stable income, and businesses can recruit and retain talented candidates. The high cost of housing in the Bay Area makes it so parents struggle to afford child care prices, so ECE businesses can't raise rates to improve wages, so ECE pay remains structurally low and talented workers leave the profession because of low wages.

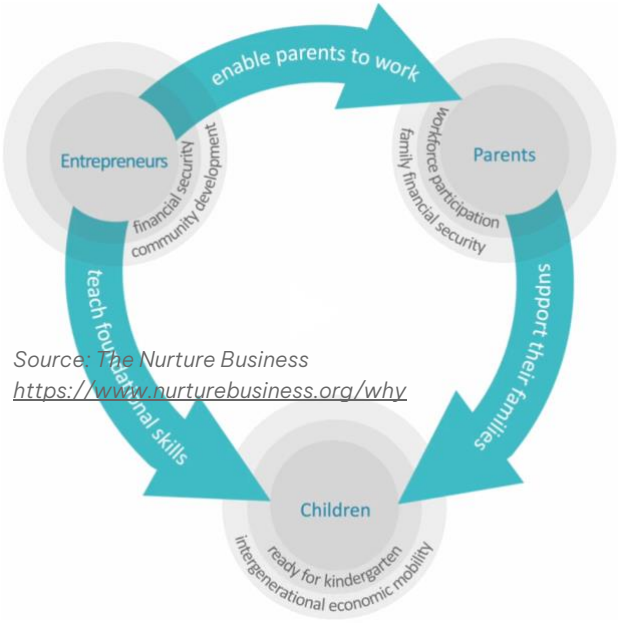
Who: The shift to finance the true cost of care (where the price consumers pay = all the expenses of ECE providers) will require regional collaboration including industry, ECE workforce, ECE training providers, labor representatives, county offices of education, county First 5s, Head Start Programs, families, state and federal agencies, and philanthropy. This multi-sector collaborative, focused on implementation, can effectively catalyze on taking a regional (instead of local-approach) to uphold the underlying principles of the California Jobs First process to deliver equitable outcomes for both providers and families.

How: Approaching the ECE market failure problem as a region vs. county-by-county will allow for efficiencies in researching, creating, and applying new models and tools that can be adopted regionwide. Making strategic investments in workforce retention and growth through, family accesses, and improved physical ECE infrastructure —all through a meaningful community and industry engagement, from inception to implementation.

Where: This plan will be applied across the 9-county Bay Area, but will consider different approaches for the geographic and demographic diversity of both providers and families.

TARGET SECTOR STRATEGY OVERVIEW

Why Prioritize the Early Care and Education Sector?



Source: The Nurture Business
https://www.nurturebusiness.org/why

"Early care and education" (ECE) refers to formal and informal education programs for children from birth to the age of five.

The Bay Area Jobs First Collaborative (BAJFC) prioritized this sector for three key reasons:

1. A strong ECE sector enables **parents** in all other sectors to work and ensures **employers** have a dependable workforce
2. **ECE providers / entrepreneurs** are highly skilled professionals, yet their compensation does not provide them with a basic livable wage for the Bay Area.
3. When enrolled in quality early care and education, **children** are more likely to be ready for kindergarten and contribute to the economy as adults.

The early care and education challenges outlined in the Bay Area Regional Plan are:

- ECE as an underappreciated public good.
- A significant gap between supply and demand.
- Disproportionate impacts on women workers - both care providers and women seeking to enter the workforce generally.
- Lack of ECE facilities.
- Lack of care during nontraditional hours.
- The high cost of care for working families.
- The expansion of universal transitional kindergarten in California public schools.
- Disproportionate impact on Black, Indigenous, and People of Color (BIPOC) communities both in terms of child care availability due to non-standard work hours and making up the majority of the child care workers.

The Early Care and Education (ECE) sector faces a persistent challenge: it is a vital public good that cannot be sustained solely by the private market. This chronic underfunding results in a dual crisis where families struggle with unaffordable child care costs, while ECE providers contend with structurally low wages and minimal benefits, driving talented workers away. Despite child care businesses operating on razor-thin margins, they cannot increase rates to improve compensation, as parent fees alone cannot cover the true cost of quality care that includes family-sustaining wages. This systemic issue underscores the urgent need for a transformative shift in funding, advocating for a regional, public education-like financial structure to recognize child care as a critical public good.

Sector Structure

The Early Care and Education (ECE) sector across California counties is a complex and interconnected ecosystem, driven by a shared commitment to ensuring that all children have access to high-quality learning environments that promote their healthy development and

prepare them for future success. This vast network involves a diverse array of public agencies, non-profit organizations, and dedicated individuals, each playing a critical role in shaping the landscape of child care and early learning. Understanding these interwoven responsibilities is fundamental to effective planning and collaboration, particularly as we seek to activate and strengthen the ECE sector for providers and families across the nine-county San Francisco Bay Area.

At the state level, the **California Department of Social Services (CDSS)** serves as the primary state agency overseeing child care and development programs, setting policies, distributing funding, and through its Community Care Licensing Division (CCLD), ensuring health and safety standards for licensed facilities.

Locally, **County Offices of Education (COEs)** are pivotal administrators, managing state and federal ECE funds, providing vital professional development and technical assistance to providers, and often directly operating programs such as California State Preschool. **Local Planning Coordinators (LPCs)**, often situated within COEs or other county departments, play a crucial role in orchestrating local ECE planning, identifying community needs, fostering inter-agency partnerships, and aligning resources to address local priorities. Complementing these efforts are **First 5 Commissions**, county-level organizations funded by tobacco tax revenues, which strategically invest in early childhood initiatives, focusing on quality improvement, family support, and health services for children aged zero to five.

The critical **link** between families and providers is often facilitated by **Resource and Referral (R&R) Agencies**. These community-based hubs, present in every county, offer indispensable support by providing families with personalized child care referrals, information on various care options, and guidance on navigating financial assistance. R&Rs are generally non-profit organizations but can be housed in a county department. For providers, R&Rs are a lifeline, offering essential training, technical assistance, and recruitment support, thereby contributing directly to both the supply and quality of child care. Beyond these key entities, the ECE landscape is shaped by the dedicated **child care providers and educators** themselves—including licensed child care centers, family child care providers, and license-exempt Family, Friend, and Neighbor (FFN) caregivers.

Higher education institutions and **workforce development programs** are essential for cultivating a skilled and sustainable ECE workforce - through community colleges and public and private colleges and universities.

Furthermore, a multitude of **advocacy organizations, philanthropic foundations, and community-based non-profits** contribute significantly by championing ECE policy, conducting research, offering direct services, and mobilizing community engagement. Ultimately, the system is designed to serve **families**, whose diverse needs and choices are central to all planning and service delivery efforts.

Child Care Supply

Early care and education is provided in in three primary settings:

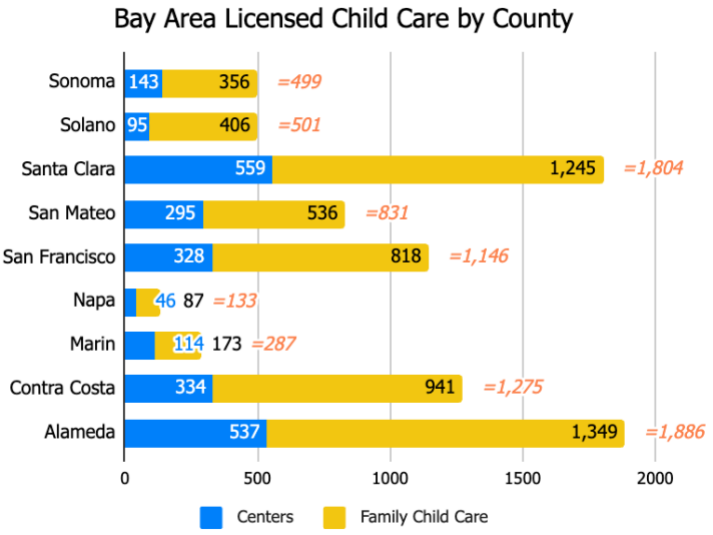
- **Licensed child care centers:** facilities in schools and around the community
- **Family child care (FCC) providers:** licensed small businesses inside homes (usually sole proprietors)

- **Family Friends and Neighbor (FFN) providers:** your "village" - grandparents, nannies, and other trusted caregivers, and who are often the primary provider for infants and toddlers

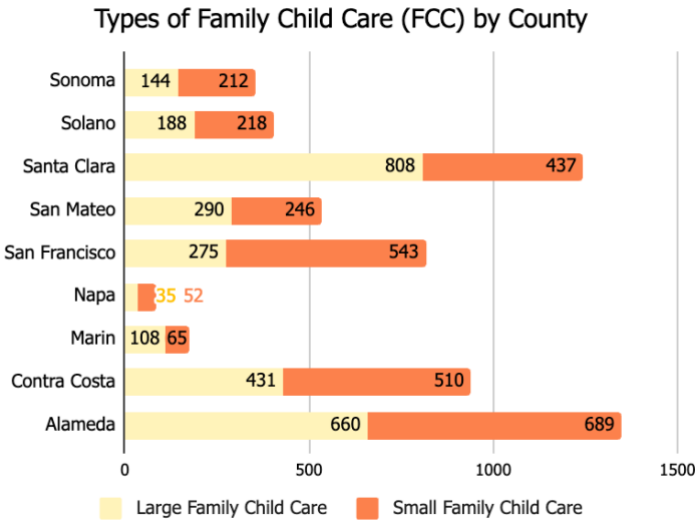
The ECE sector contains many small businesses with almost no operating margin. They rely on an ecosystem of support that includes resource & referral agencies, First 5s, county offices of education, and more. Each of these entities provides critical buttressing, and any new initiatives should be additive rather than duplicative. Moreover, ECE providers are facing a shifting market as four-year-olds drain from ECE sites to enroll in newly expanded public transitional kindergarten (TK) programs.

Across all Bay Area counties, licensed family child care facilities significantly outnumber licensed centers. There are a total of 5,911 family child care facilities compared to 2,451 centers in the region. On average, family child care facilities constitute approximately 69.78% of all ECE facilities, while centers make up about 30.22%.

Solano County has the highest percentage of family child care facilities (81.00%), while Marin County has the highest percentage of centers (40.00%). The number of ECE facilities varies considerably across counties, because of the different population sizes.



Source: Center for the Study of Child Care Employment analysis of data from Community Care Licensing in combination with Head Start, State Preschool, and California Dept of Social Services. 2025.



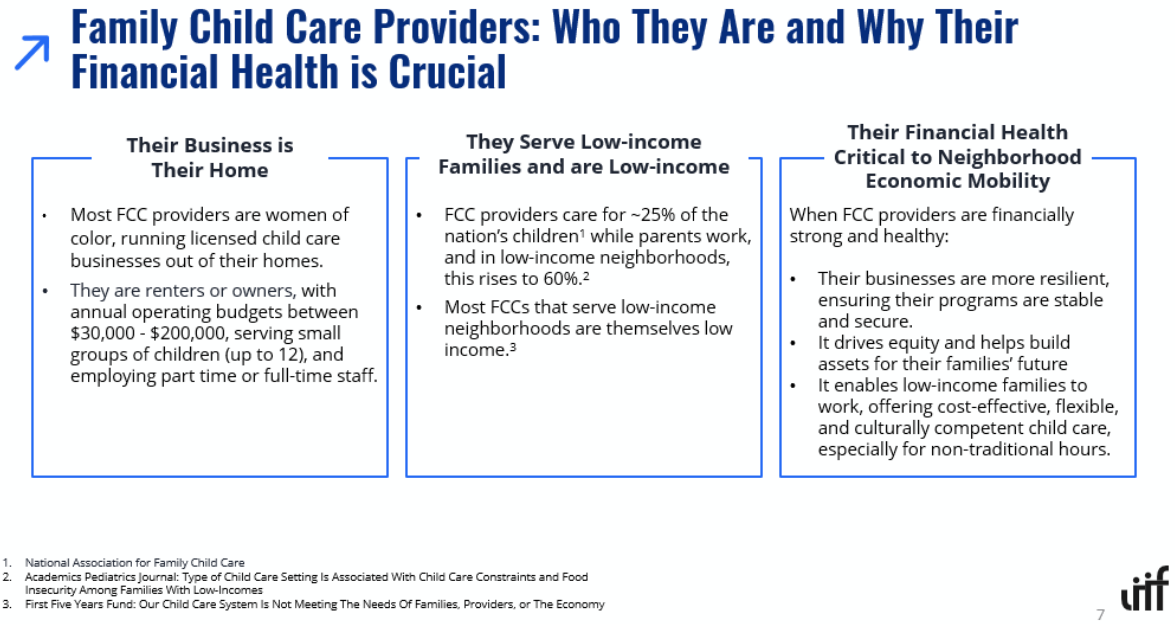
Family Child Care

Family child care (FCC) is categorized into two types: Large FCC and Small FCC. A Small FCC licence allows the single provider to provide care for up to eight children (fewer if younger ages). Generally the provider will operate alone or with a part time assistant. A Large FCC can care for up to 14 children (could be fewer depending on age mix) and must have at least one other qualified adult or assistant provider working with the licensee whenever the number of children in care exceeds the capacity of a Small FCCH (i.e., typically more than 8 children). A Large FCCH is required to obtain a fire clearance from the local fire authority as part of the licensing process. Under recent state law (SB 234, effective

Jan 1, 2020), cities and counties cannot require FCCs to obtain a separate business license or zoning permit, treating them as a residential use of property.

Across all Bay Area counties, the total number of large FCC facilities (2,939) is very close to the total number of small FCC facilities (2,972), resulting in a total of 5,911 family child care facilities. However, at the county level, there's a noticeable variation in the proportion of large vs. small FCCs. For instance, in San Francisco, small FCCs significantly outnumber large FCCs (66.38% vs. 33.62%), while in Santa Clara, large FCCs are more prevalent (64.90% vs. 35.10%). These differences highlight potential differences in population density, demand for child care, or local regulations and support that influence the establishment and operation of family child care facilities in different counties.

Source: Center for the Study of Child Care Employment analysis of data from Community Care Licensing in combination with Head Start, State Preschool, and California Dept of Social Services. 2025.

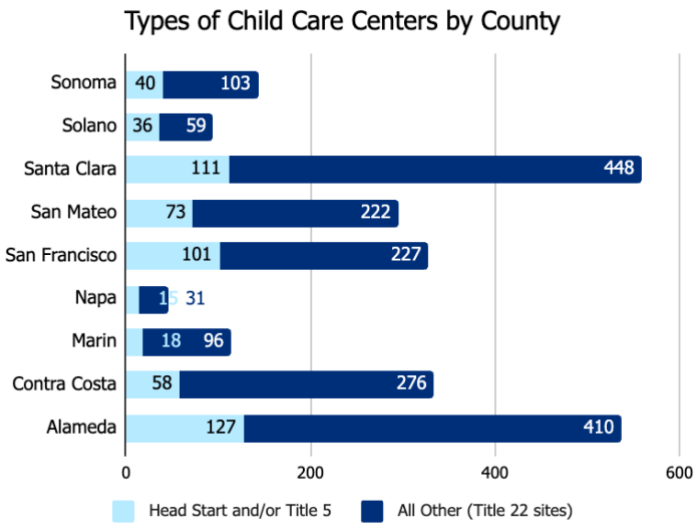


Child Care Centers

Child care centers are comprised of three primary types:

- **Title 22 centers** refer to any child care center that is licensed by the California Department of Social Services (CDSS). This graph shows Title 22 centers (which excludes Title 22 family child care, Title 5 centers, and Head Start centers).
- **Title 5 child care centers** are state-funded programs that offer high-quality, subsidized early learning experiences to eligible families, operating under more rigorous standards than basic Title 22 licensed facilities. They play a crucial role in expanding access to early education for vulnerable populations in California.
- **Head Start centers** are federally-funded early childhood programs designed to promote school readiness for children from low-income families, from birth through age five. Head Start encompasses two main program types:
    - *Early Head Start*, which serves pregnant women and families with infants and toddlers (children from birth to age 3) and

- *Head Start Preschool*, which primarily serves children aged 3 to 5 years old. Head Start centers can be both private businesses (including non-profit and for-profit organizations) that are contracted by the government, and public ECE centers (such as those operated by school districts or other public agencies).



Source: Center for the Study of Child Care Employment analysis of data from Community Care Licensing in combination with Head Start, State Preschool, and California Dept of Social Services. 2025.

The chart provides information on the number of early care and education (ECE) centers by program type across different Bay Area counties. In the region there are 188 Head Start centers, 506 Title 5 centers (State Contractor, including California State Preschool Programs (CSPP)), and 1,872 other Title 22 centers for a total of 2,451 child care centers in the Bay Area.

Family Friend and Neighbor Caregivers

Family, Friend, and Neighbor (FFN) caregivers represent a significant and often informal segment of the child care landscape. These are individuals, typically relatives (such as grandparents, aunts, and uncles), close friends, or trusted neighbors, who provide care for children outside of a formally licensed setting. FFN care is frequently chosen by families due to established trust, cultural and linguistic alignment, and often greater flexibility, including accommodating non-traditional work hours like evenings and weekends. While some FFN caregivers may receive private payment or even public subsidies (becoming "legally non-licensed" providers), many provide care without formal compensation, viewing it as a familial or community responsibility. Despite their widespread prevalence—caring for millions of children across the U.S. and often being the primary care arrangement for infants and toddlers—FFN caregivers are frequently overlooked in broader discussions about child care policy, resources, and support, though efforts are increasing to recognize and provide resources for their vital role.

The report "Caregiver Motivation, Identity, and Resilience: A Study of Family, Friend, Neighbor (FFN), and Nanny Care in California - Part Two" sheds light on the unique experiences of informal child care providers. It highlights that FFN caregivers often enter the role out of a desire to support loved ones, with nannies more frequently motivated by income. Most FFN caregivers care for one or two children, often between the ages of three to five, providing over 30 hours of care per week, with Black caregivers reporting a median of 35 hours weekly. Many operate from their own homes and frequently engage children in community activities like visits to parks and libraries.

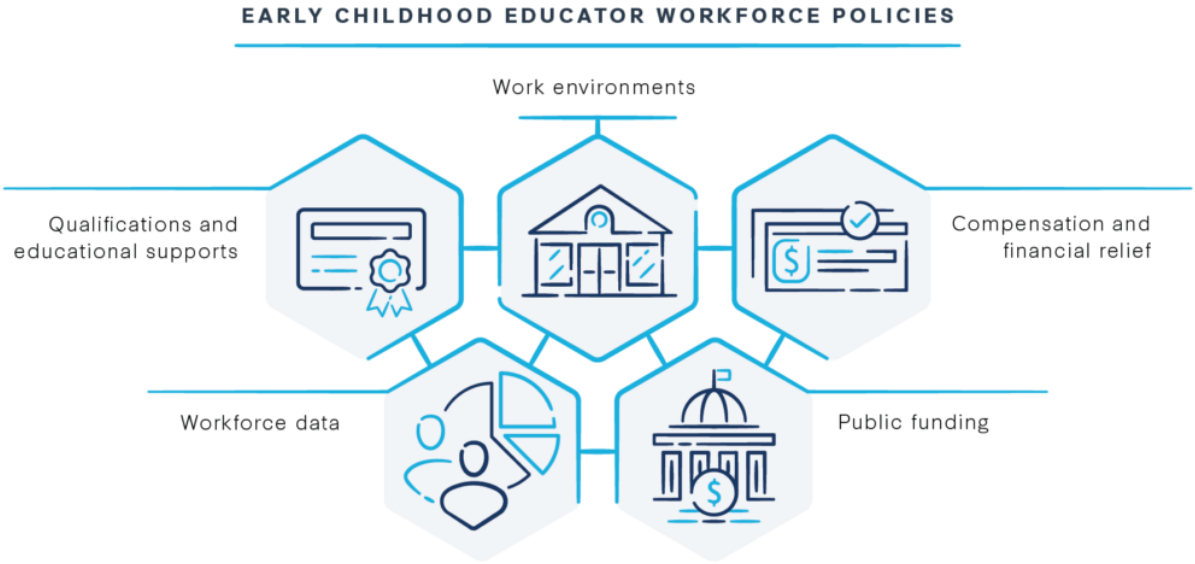
Financially, the study reveals significant challenges. While many FFN caregivers are paid, their earnings typically hover around $8 per hour, starkly contrasting with nannies who earn closer to $17 per hour, similar to licensed center educators. A major concern is the lack of benefits; most FFN caregivers do not have health insurance, and nearly two-thirds lack retirement savings. FFN caregivers in the sample were four to five times more likely to rely on public assistance programs like SNAP (CalFresh) compared to the average California worker. They also frequently incur out-of-pocket expenses for essentials like food, transportation, and supplies for the children in their care.

Workforce

The need to invest in the early care and education workforce continues, as too many early educators still struggle in poverty, and programs continue to face high turnover and difficulty recruiting and retaining staff. COVID-19 relief funding was never sufficient, nor was it intended to sustain the ECE system or the workforce over the long term.

Early educators' poor working conditions are not inevitable, but a product of policy choices that have consistently let down the women who are doing this essential work. It's time for the system to change. State and local leaders have the power and authority to advance policies to support the ECE workforce, with and without federal funding.

Making early care and education an attractive field now and in the future means fundamentally reshaping early childhood jobs to provide fair compensation and supportive working conditions. Not only will this change make a meaningful difference to the financial lives of current and future early educators, but it will be a major step toward recognizing the value of historically feminized work and establishing a racially and gender-just society.



Source: Center for the Study of Child Care Employment. Early Childhood Workforce Index 2024. https://cscce.berkeley.edu/workforce-index-2024/

As cited in the Bay Area Regional Plan, the early care and education (ECE) sector employed 35,991 workers in the Bay Area in 2022, a decline from 2012, with a workforce that is predominantly female and reliant on BIPOC and immigrant workers who make up more than 50% of the Bay Area ECE workforce. Despite the decline in ECE sector employment in recent years, the sector is predicted to add nearly 6,000 jobs for preschool teachers, child care workers, and ECE administrators between 2020 and 2030.

The Center for the Study of Child Care Employment, UC Berkeley hosts a demographics of the California ECE Workforce website where users can access data by region. https://cscce.berkeley.edu/publications/data-snapshot/demographics-of-the-california-ece-workforce/

The data below is from the Bay Area regional summary, however this data includes Santa Cruz County in addition to the other 9-counties of the Bay Area that are part of the Bay Area Jobs First region.

Demographics of Early Educators in the Bay Area & California (2020)

	BAY AREA			CALIFORNIA		
	Family Care Providers	Center Directors	Center Teaching Staff	Family Care Providers	Center Directors	Center Teaching Staff
Age						
29 yrs or younger	3%	3%	17%	3%	3%	18%
30 to 39 yrs	13%	13%	26%	16%	16%	25%
40 to 49 yrs	28%	26%	22%	29%	25%	24%
50 to 59 yrs	32%	31%	24%	31%	31%	22%
60 yrs or older	25%	20%	10%	22%	22%	11%
Country of Birth						
United States	48%	78%	64%	58%	82%	72%
Another country	52%	22%	36%	42%	18%	28%
Gender						
Women	99%	97%	96%	98%	97%	98%
Men	1%	3%	2%	1%	3%	2%
All other genders*	0%	0%	1%	0%	0%	0%
Marital Status						
Married/Partnered	74%	75%	65%	74%	76%	64%
Unmarried/Single	26%	25%	35%	26%	24%	36%
Race/Ethnicity						
Asian	29%	19%	19%	12%	9%	10%
Black	10%	7%	7%	12%	6%	5%
Latinx	27%	11%	27%	37%	20%	39%
Multiethnic	6%	7%	9%	6%	7%	8%
White	25%	52%	36%	29%	55%	34%
Other	4%	3%	3%	4%	3%	3%

Data Source: Center for the Study of Child Care Employment, UC Berkeley
https://cscce.berkeley.edu/publications/data-snapshot/demographics-of-the-california-ece-workforce/
NOTE: This data includes Santa Cruz County in addition to the other 9-counties of the Bay Area.

Notable highlights from the "Demographics of Early Educators in the Bay Area & California (2020)" data table include:

Gender

The ECE workforce is almost entirely composed of women. 99% of family care providers, 96% of center teaching staff, and 97% of center directors identify as women.

Aging Workforce in Family Care and Center Directors

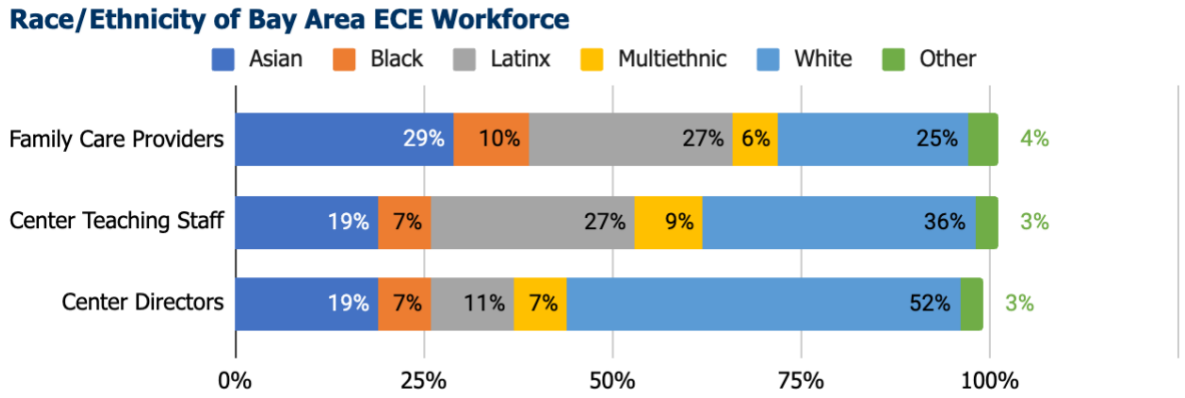
In the Bay Area, 57.0% of Family Care Providers and 51.0% of Center Directors are 50 years or older. Statewide, these figures are 53.0% for Family Care Providers and 53.0% for Center Directors. This indicates a prominent trend of an aging workforce in these roles, potentially leading to future workforce shortages as these professionals retire.

Younger Workforce in Center Teaching Staff

In the Bay Area, 43.0% of Center Teaching Staff are 39 years or younger, which is significantly higher than the percentages for Family Care Providers (16.0%) and Center Directors (16.0%). The statewide figures show a similar trend. Teaching staff roles tend to be a stepping stone to a higher-paid and less physically-demanding Center Director position.

Race/Ethnicity

While BIPOC comprise the majority of the ECE workforce, it varies across roles: 75% of family care providers, 64% of center teaching staff, and only 48% of center directors identify of BIPOC.



Latinx Representation: Latinx professionals are consistently a significant presence, especially in Family Care Providers and Center Teaching Staff roles, both in the Bay Area and statewide. Their representation is notably higher statewide for these roles.

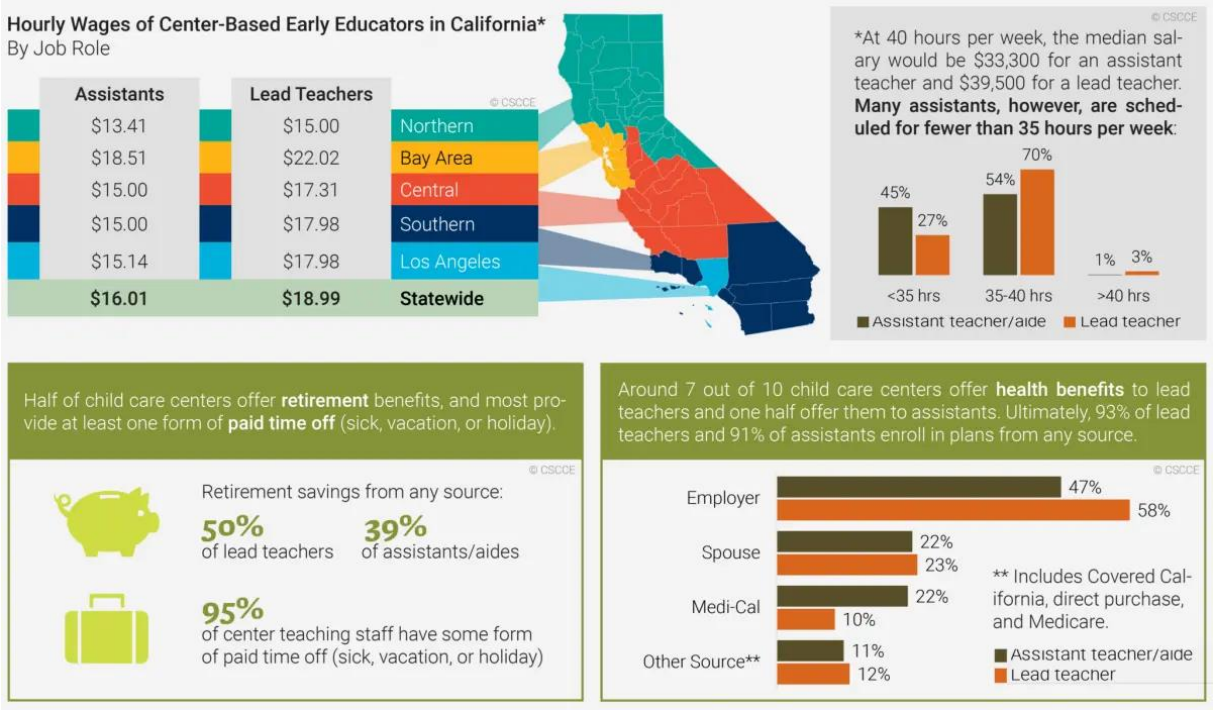
Asian Representation: Asian professionals have a stronger presence in the Bay Area across all roles compared to the statewide figures, particularly for Family Care Providers and Center Directors.

White Representation: White professionals are consistently the largest racial/ethnic group among Center Directors in both regions, and also a large group in Center Teaching Staff.

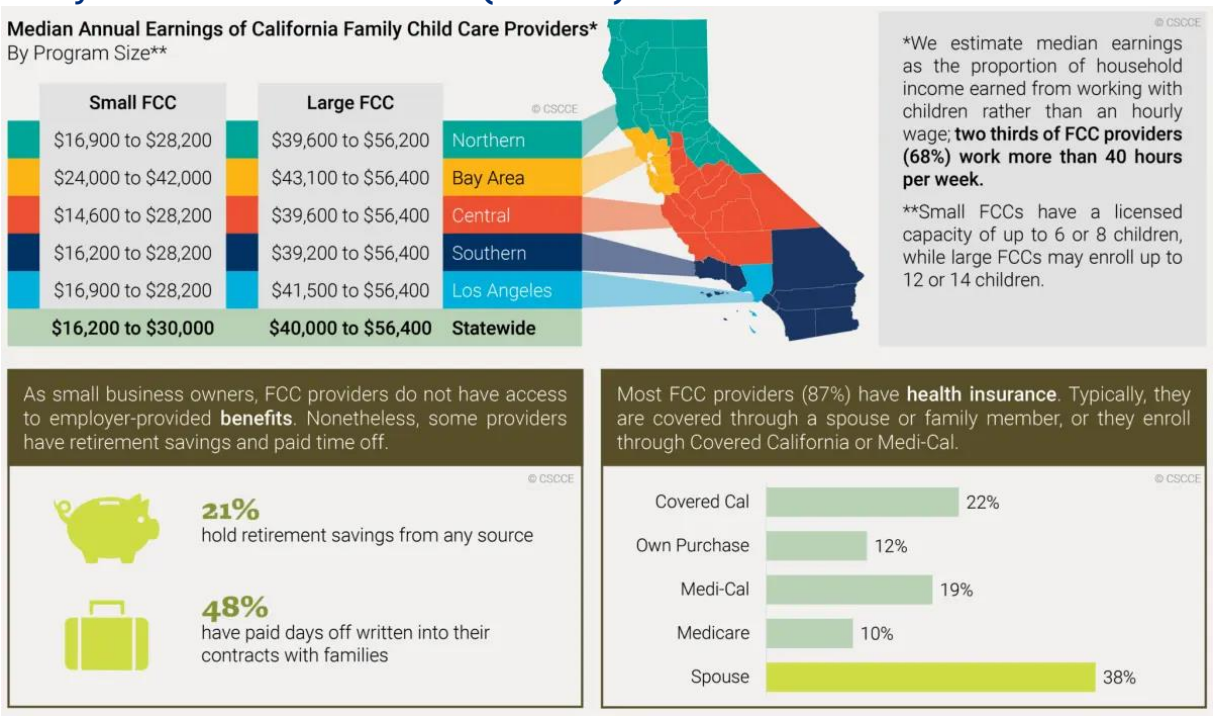
Black Representation: Black professionals generally have lower percentages across all roles and regions compared to Asian, Latinx, and White groups, with slightly higher representation in Family Care Providers than in Center Directors or Teaching Staff.

Center-Based Early Educators Profile (CA 2020)

Wages in ECE are structurally low due to the broken child care market and minimal amount of public funding. Most providers in the Bay Area earn below a living wage.



Family Child Care Educators Profile (CA 2020)



Source: https://cscce.berkeley.edu/publications/fact-sheet/profiles-of-the-california-early-care-and-education-workforce-2020/

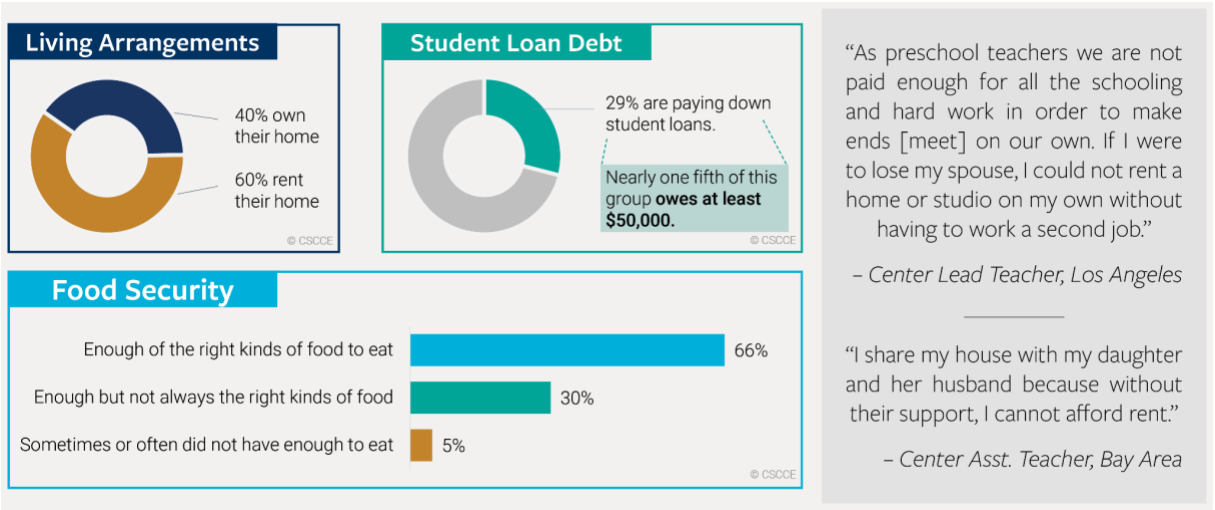
Racial Inequities Among Early Educators

Women of color make up nearly two-thirds of the early childhood workforce in California, yet they routinely earn lower wages and hold lower positions than their white peers — even when they have more education, according to the Center for the Study of Child Care Employment in their study "The Multilayered Effects of Racism on Early Educators in California".

The researchers surveyed 7,500 individuals working in the child-care sector in late 2020 and found that in California:

- Black and Latina educators are more likely to be employed in lower-paying roles.
- Black educators are not rewarded with pay increases for obtaining a higher educational degree, so they exit the profession, leaving a gap in representation.
- Black, Latina, and Asian teachers receive smaller pay increases when they are promoted to director of a child-care center than do their white peers.
- White educators make up 35% of the overall workforce but hold 54% of leadership positions.
- Latinas represent 40% of the early childhood workforce but make up 24% of child-care center directors.
- Black directors earn $3,600 less and Latina directors earn $7,700 less than Asian or white center directors
- While Black educators make up 8% of the total early child-care workforce, they are 13% of in-home child-care providers, who are the most likely to report economic worries.

Poor benefits are also common, with many early educators relying on Medi-Cal for themselves or their children. These economic concerns are core drivers of high turnover of educators and the number one barrier to a high road jobs model. Many ECE providers struggle with their own economic well-being. The majority of them are renters, 29% are trying to pay down student loans, and one-third struggle with food insecurity.



Because of these low wages California Child Care Centers have a chronic problem with staff turnover with about 75% of centers having any turnover at their site last year. Work with young children is emotionally and physically challenging, and programs rarely have funding to address the quality of working environments for their staff. After wages, challenging work environments are a top driver of turnover among the ECE workforce. However, there are

robust guidelines already available which could be used to spur conversation and action around addressing this issue.

Staff Turnover Between 2023 and 2024, By Center Type

California Child Care Centers, 2023-2024

	All Centers	Head Start/Title 5	Title 22
Turnover average by site	**N=455**	**N=141**	**N=304**
Any turnover at site	75%	71%	77%
Teachers who left	2.9	3.0	2.9
Assistants who left	2.6	3.0	2.3
Overall turnover rate	**N=297**	**N=83**	**N=214**
Lead teachers	24%	20%	26%
Assistant teachers	32%	23%	36%

Source: Center for the Study of Child Care Employment, University of California, Berkeley
Note: We estimate the overall turnover rate by dividing the number of individuals who left by current staffing. The

ECE wages will not reach a living wage through market forces, but ECE is a vital industry, and its workers make sure every other workforce can stay employed.

ECE Education and Training

Due to high teacher turnover, vacancies are abundant in ECE and many programs operate below capacity due to inability to fill positions. Moreover, it is impossible to expand access to care to more families when programs cannot even maximize current operations (let alone expand). Barriers to entry-level jobs in ECE are quite low, but nonetheless, there are not enough individuals entering the field and even fewer who continue on and earn vital degrees and certifications. Bolstering pathways into and through ECE careers are vital to countering these forces. Moreover, since ECE wages are so low, pathways must be low cost or free and fit the needs of working professionals in order to be successful.

Families and Access

The BAJFC ECE Sector Investment Coordinator team reviewed 29 ECE plans from organizations in the nine Bay Area counties reveals specific access gaps including:

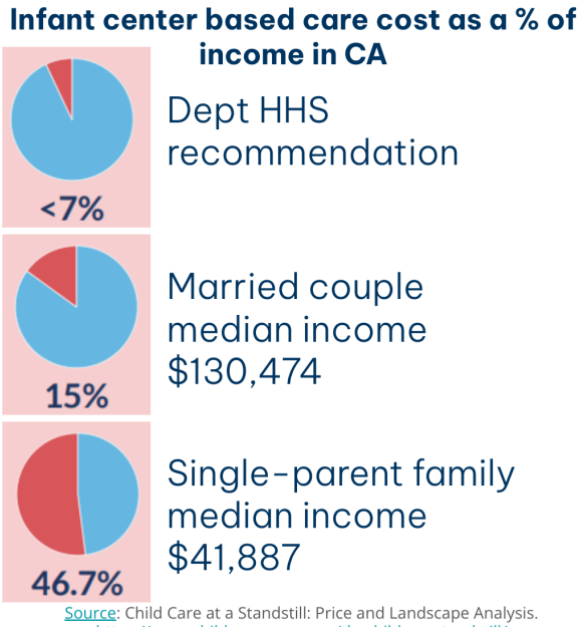
1. **Language Barriers and Cultural Competence of ECE Programs.** Monolingual families, especially Spanish- and Cantonese-speaking communities, face difficulties due to language barriers and a lack of culturally responsive communication and services.

2. **Racial and Systemic Racism.** Experiences of racism and perceived discrimination inhibit access, as families of color, particularly Black/African American families, feel excluded or face systemic biases within service environments.

3. **System Complexity and Navigation Challenges.** Many families report not knowing about existing resources, programs, or how to navigate the complex early childhood system, leading to low awareness and utilization of services. Families find the early care system complex, with confusing eligibility criteria, eligibility pathways, and referral processes, which discourages or delays access.

4. **Financial Barriers and Affordability.** The costs of programs, perceived or actual, can be prohibitive, especially before accessing subsidies or scholarships. Families with limited income or uncertain financial situations face difficulties affording quality care.
5. **Geographical and Transportation Barriers.** Families living in underserved or outlying areas face challenges traveling to or accessing programs in more resource-rich locations. Transportation issues further limit their ability to participate.
6. **Limited Program Availability and Long Waitlists.** There are shortages of high-quality, culturally-responsive providers and programs, leading to long waitlists and difficulty securing spots promptly.
7. **Scheduling and Work-Related Constraints.** Rigid program hours that do not align with parents' work schedules, especially for those working late or non-traditional hours, limit access. Lack of flexible or extended hours creates barriers for working families.
8. **Perceived or Actual Quality Concerns.** Families may avoid certain programs due to concerns about quality, safety, or responsiveness, especially if providers lack cultural competence or do not reflect family values and languages.
9. **Insufficient Support for Non-Working or Marginalized Families.** Families who are not unemployed or do not fit specific eligibility criteria often feel excluded from targeted supports, experiencing barriers even if they need assistance.

We synthesized data from the 2023 California Child Care Portfolio, offering a comprehensive look at population trends, poverty indicators, child care supply and costs, availability, and language demographics across California and its nine Bay Area counties.



Source: Child Care at a Standstill: Price and Landscape Analysis. https://www.childcareaware.org/thechildcarestandstill/

Population Trends

The Bay Area, with over 7.6 million residents, is home to nearly half a million children aged 0-5. Both California and the Bay Area experienced a decline in their child populations from 2021 to 2023. The number of children aged 0-5 in California decreased by 6.03%, while the Bay Area saw a slightly lower decrease of 5.79% in the same age group.

Poverty and Subsidized Care

Poverty remains a significant concern. In 2023, approximately 654,000 people in the Bay Area lived below the federal poverty line, including nearly 37,000 children aged 0-5. The percentage of families below the federal poverty line in the Bay Area (7.9%) is notably lower than the California average (13%), however the cost of living is higher here than in California. For a family at the median income in the Bay Area, there is an average monthly deficit of $1,743 to cover essential expenses, highlighting the financial strain even on those above

poverty thresholds. Subsidized child care plays a crucial role, with over 54,000 children enrolled in such programs across the Bay Area.

Bay Area Livable Wages

Livable Annual Income for a Single Adult			Single Adult, 1 Infant		Two Adults, 2 School Age	
County	Annual	Hourly	Annual	Hourly	Annual	Hourly
Alameda	$54,503	$25.81	$121,465	$57.51	$136,942	$32.42
Contra Costa	$55,214	$26.14	$116,990	$55.39	$133,916	$31.70
Marin	$69,152	$32.74	$143,471	$67.93	$157,092	$37.19
Napa Valley	$53,419	$25.29	$105,109	$49.77	$127,151	$30.10
San Francisco	$59,823	$28.33	$136,591	$64.67	$139,995	$33.14
San Mateo	$72,409	$34.28	$147,051	$69.63	$160,636	$38.03
Santa Clara	$64,980	$30.77	$132,686	$62.82	$146,326	$34.64
Solano	$48,665	$23.04	$96,522	$45.70	$115,508	$27.35
Sonoma	$49,017	$23.21	$102,660	$48.61	$124,372	$29.44
CALIFORNIA	$50,035					

Data Vista Living Wages Table Modified February 2025

Source: Center for Women's Welfare, University of Washington. http://www.selfsufficiencystandard.org/California

Licensed Child Care Supply

The Bay Area's licensed child care infrastructure includes 145,826 center spaces for children 0-5 and 59,000 family child care home spaces. Approximately 23% of Bay Area child care centers have government contracts, suggesting a segment of the supply is supported by public funding.

Median Monthly Full-Time Child Care Costs (2019-2022)

Child care costs in the Bay Area are consistently higher than the state average. The median monthly cost for center-based infant care in the Bay Area is $2,205, significantly above California's $1,643. San Francisco stands out with the highest costs across all age groups for both center and family child care. Sonoma, in contrast, tends to have lower costs compared to other Bay Area counties, though still higher than California's overall average for some categories.

While most families do not receive public child care subsidies, paying for market-rate care is a challenge for most households. Employers ranked early care and education benefits as a top priority (compared to other benefits). Employees and employers would like to see that benefit in the form of dependent care FSAs, cash subsidies, new parent support, and/or on-site child care (Source: The Future of Benefits 2024).

Licensed Child Care Availability

Despite the supply, availability remains a challenge. On average, only 34.6% of children aged 0-12 with parents in the labor force in the Bay Area have a licensed child care space available, compared to 26% statewide. San Francisco (54%) and Marin (45%) show higher availability rates, while Napa (24%), Solano (23%), and Sonoma (25%) report lower percentages, indicating potential child care deserts in these areas.

Requests for Non-Traditional Hours

A small but significant percentage of child care requests in the Bay Area (around 3.5%) are for non-traditional hours (evenings, weekends, or overnight care). This highlights a specific need that may not be fully met by standard child care operating hours, posing challenges for

parents with non-9-to-5 jobs. It is also more likely that these non-9-to-5-jobs have lower wages.

Physical Infrastructure and ECE Facilities

Many child care centers and family child care homes are in dire need of physical upgrades, however the small profit margins do not typically allow for major facility improvements. The Child Care & Development Infrastructure Grant Program (IGP) is a grant program administered by the California Department of Social Services in partnership with the Low Income Investment Fund (LIIF). Grants are awarded to eligible child care providers, both centers and family-based, to improve the quality and expand the capacity of their facilities. All current funding, a total of $300.5 million, has been allocated.

Round 1 of the funding included repairing and replacing play equipment, fixing flooring, plumbing, HVAC and electrical systems, as well as shoring up fire safety features and meeting ADA requirements, among other uses. Round 2 funded projects focused on new construction and major renovations to expand the number of child care spaces across the state.

While this program has positively impacted many child care providers, families and young children, there is still a great need to secure more early care and education facilities funding to expand the benefits to more providers.

Bay Area California Child Care & Development Infrastructure Grant Program (IGP)

County	Round 1 Projects	Round 1 Grants	Round 2 Projects	Round 2 Grants	Total Projects	Total Grants
Alameda	216	$12,008,526	8	$5,461,138	224	$17,469,664
Contra Costa	111	$5,727,784	12	$8,125,616	123	$13,853,400
Marin	46	$3,338,170	4	$2,875,439	50	$6,213,609
Napa	12	$570,635	2	$2,504,126	14	$3,074,761
San Francisco	180	$7,951,938	43	$25,301,631	223	$33,253,569
San Mateo	56	$3,857,723	2	$1,600,000	58	$5,457,723
Santa Clara	163	$10,141,653	7	$5,309,561	170	$15,451,214
Solano	49	$2,686,425	5	$3,188,704	54	$5,875,129
Sonoma	57	$4,064,365	1	$100,000	58	$4,164,365
Bay Area Totals	**890**	**$50,347,218**	**84**	**$54,466,215**	**974**	**$104,813,433**

Source: Low Income Investment Fund program data.

Opportunities

The state priorities and political will, especially California's Master Plan for Early Learning and Care, underscore the growing awareness of the sector's importance. Several Bay Area counties and cities have passed or have pending child care funding measures that include investments in workforce development. Universal TK and the FFN sub-sector present opportunities for workforce development and supporting underserved communities,

respectively. The need for affordable child care will continue to increase as the Bay Area's economy expands, requiring major improvements in the ECE sector. Workers in this sector need to be supported and valued with living wages, accessible benefits, and opportunities for growth.

The ECE sector benefits from the engagement of numerous partner organizations at the local level. These include local government and nonprofit partners, philanthropic organizations, the community college system, universities and research institutions, and advocacy groups. Organizations like Resource and Referral Agencies (R&Rs), LPCs, First 5s, unions (Child Care Providers United-CCPU, Service Employees International Union -SEIU 521, SEIU 1021), and advocacy groups such as Parent Voices are crucial for sector support.

Overview of Investment Strategies and Tactics

This Activation Plan is anchored by four investment strategies. The first three are based off of the priority investment strategies put forth in the Bay Area Regional Plan:

STRATEGY A: WORKFORCE	STRATEGY B: ACCESS	STRATEGY C: INFRASTRUCTURE	STRATEGY D: PROCESS AND STRUCTURE
Transform ECE careers into viable, family-supporting, high-road, high-quality economic opportunities by raising the wage floor.	Identify and remove barriers for families and caregivers to increase equitable access.	Provide and enhance the physical infrastructure needed for the sector to sustain and grow.	Create and provide backbone support to an inclusive and effective Bay Area ECE Sector Investment Implementation Process.

The plan is supported by fourteen tactics: four to support the Workforce strategy, five to support Access, four to support Infrastructure, and one to support Process and Structure. *(List is hyperlinked to the tactical workplan matrices below)*

Strategy A: WORKFORCE. Transform ECE careers into viable, family-supporting, high-road, high-quality economic opportunities by raising the wage floor.

Tactic A.1: Develop high-road standards for ECE wage scales and benefits for the Bay Area.

Tactic A.2: Expand the ecosystem of support for ECE programs and providers.

Tactic A.3: Promote high-road standards for ECE work environments.

Tactic A.4: Bolster pathways programs for entry into and advancement in the ECE field.

Strategy B. ACCESS. Identify and remove barriers for families and caregivers to increase equitable access.

Tactic B.1: Reimagine the Local Planning Council's Child Care Needs Assessments as a regional tool to identify gaps and serve as a marker of progress.

Tactic B.2: Explore ways to generate ECE funding at a regional level.

Tactic B.3: Address access gaps by building ECE supply for targeted populations.

Tactic B.4: Create and adopt common data systems and tech platforms for family- and provider-facing functions across the Bay Area to simplify application and enrollment in ECE and other family-supportive programs.

Tactic B.5: Develop regional resources to support Child Care Resource and Referral (R&R) capacity and enhance MyChildCarePlan to make it easier for families to find ECE programs.

Strategy C: INFRASTRUCTURE. Provide and enhance the physical infrastructure needed for the sector to sustain and grow.

Tactic C.1: Establish a dedicated Child Care Facilities Fund for the nine-county Bay Area and ensure ECE providers have access to robust technical assistance to successfully complete facilities development projects and sustain their businesses.

Tactic C.2: Center children in community planning processes by promoting supportive land-use policies, improving design standards and aligning regulations and approval processes.

Tactic C.3: Align supply building initiatives with housing, community development, and tax credit programs.

Tactic C.4: Encourage the use of existing publicly owned assets to build ECE supply.

Strategy D: PROCESS AND STRUCTURE. Create and provide backbone support to an inclusive and effective Bay Area ECE Sector Investment Implementation Process.

Tactic D.1: Engage the ECE Sector and Stakeholders in refining and implementing the ECE Activation Plan.

Cross-Cutting Themes

There is overlap among workforce, access, and physical infrastructure, so we are highlighting some of the cross-cutting themes that have emerged during this Activation Plan writing process.

Equity & Inclusion: Focus on families with the least access—those with infants/toddlers, working nonstandard hours, non-English speakers, and communities historically excluded from investment, including Black families. Special focus on family child care, FFN caregivers, immigrant providers, and Black early educators who are among the most underpaid in the sector. Ensure regional equity by addressing gaps across counties and ensure alignment between local and regional planning to meet the unique needs of each racial, cultural, linguistic, and economic group.

Technology & Data: Centralized systems will streamline enrollment and help track progress.

Regional Coordination: Shared infrastructure and planning tools across all Bay Area counties.

Sustainable Public Funding: Long-term success relies on increased investment and innovative funding solutions at local, state and federal levels.

Technical Assistance: Central to every tactic—providers need help navigating regulations, finances, and facility design.

Shared Policy Advocacy: Zoning and regulation reform, ballot measures, and tax incentives are critical levers to unlock funding and space. Shared advocacy leads to changes in local and state policy.

Partnership and Collaboration: Efforts involve the Center for the Study of Child Care Employment (CSCCE), the Low Income Investment Fund (LIIF), Parent Voices, Catalyst Projects; First 5s, Local Planning Coordinators (LPCs), and Resource & Referral Agencies from each county; labor partners, and community colleges. Coordination between government, philanthropy, employers, private investors, developers, and ECE operators.

OPERATING STRUCTURE

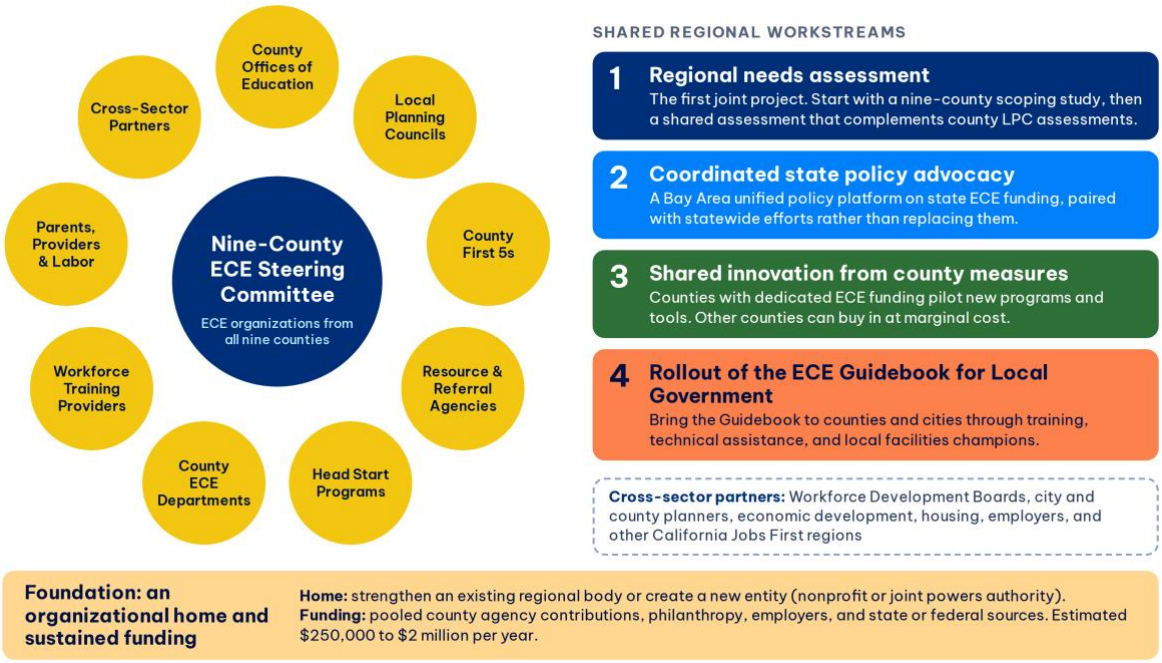
Building a regionally coordinated early care and education (ECE) sector requires sustained engagement across public, private, nonprofit, academic, and philanthropic organizations. From 2024 through September 2026, the Sector Investment Coordinator team (BAM Consulting, the Low Income Investment Fund, and the UC Berkeley Center for the Study of Child Care Employment) carried this work under the Bay Area Jobs First Collaborative, with All Home as regional convener. That funding ended on September 30, 2026, and no entity is currently responsible for carrying the Plan forward. The priority for the next phase is to establish a nine-county ECE steering committee and find it a durable home (detailed in Strategy D).

The original Plan proposed expanding the Advisory Council of the High Road to Early Childhood Education Consortium, a four-county Catalyst project, into a shared nine-county body. The ECE Sector Investment Coordinator team pursued this collaboration, but a shared table did not fit within the Catalyst project's scope. With Catalyst projects now concluded, the Plan instead calls for working directly with ECE stakeholders across all nine counties to establish a steering committee that starts with collaboration on one or two regional priority projects and then expand into a more comprehensive body after initial pilot collaboration.

Stakeholders were clear that a regional body should not duplicate county work or substitute for state action. Going forward, each tactic should be assessed by the level where it can be done most effectively: by county, by subregion, by region, or only statewide. Any regional structure must be paired with statewide advocacy for sustainable public funding, not offered as an alternative to it.

Stakeholders weighed several options for hosting regional ECE coordination: strengthening an existing body, such as the CCCCA Bay Area chapter of Local Planning Council coordinators, or establishing a regional group of First 5s or resource and referral agencies, the Bay Area Council, or MTC/ABAG; or creating a new entity, such as a nonprofit or joint powers authority. All Home's Regional Impact Council is also a potential home. This Plan does not recommend a single host. Stakeholders suggested that a comprehensive regional body may grow best from a single, issue-specific regional effort that lets the counties test working together, and a regional needs assessment is the leading candidate. Estimated operating costs range from $250,000 to $2 million per year depending on scope. Potential sources include some combination of pooled contributions from county agencies, philanthropy, employers, and state or federal funds.

The governance structure will operate in alignment with the collaborative's established goals, principles, and values.



The next phase of regional coordination centers on a nine-county ECE steering committee. Its members are the ECE organizations that already carry this work in each county: county offices of education, Local Planning Councils, First 5s, resource and referral agencies, Head Start programs, county ECE departments, workforce training providers, and parents, providers, and labor. Cross-sector partners, including Workforce Development Boards, city and county planners, economic development, housing, employers, and other California Jobs First regions, join where the work touches their systems.

Rather than launching a comprehensive regional body all at once, the steering committee would organize around four shared workstreams:

1. **Regional needs assessment.** The first joint project. It starts with a nine-county scoping study, then a shared assessment that complements county Local Planning Council needs assessments (Tactic B.1).
2. **Coordinated state policy advocacy.** A Bay Area unified policy platform on state ECE funding, paired with statewide efforts rather than replacing them (Tactics A.1 and D.1).
3. **Shared innovation from county measures.** Counties with dedicated ECE funding pilot new programs and tools, and other counties can buy in at marginal cost (Tactics B.2 and B.4).
4. **Rollout of the ECE Guidebook for Local Government.** The Guidebook reaches counties and cities through training, technical assistance, and a network of local facilities champions (Tactics C.1 and C.2).

All four workstreams rest on a foundation that does not yet exist: an organizational home and sustained funding. The region could strengthen an existing body or create a new entity, such as a nonprofit or joint powers authority. Funding could come from pooled county agency contributions, philanthropy, employers, and state or federal sources, at an estimated $250,000 to $2 million per year depending on scope (Strategy D).

Sixteen Bay Area ECE stakeholders volunteered to support the continuation of this regional coordination, including two BAJFC Steering Committee members.

The stakeholder groups below play distinct roles in regional ECE work and are potential partners to consider for the steering committee:

- **State Agencies:** The state administers various child care and development programs. Most of the state's subsidized child care is administered by the Department of Social Services (DSS) through three programs: (1) California Work Opportunity and Responsibility to Kids (CalWORKs) child care, (2) the California Alternative Payment Program (CAPP), and (3) the General Child Care program. CalWORKs child care programs focus on families enrolled in or transitioning out of CalWORKs welfare-to-work activities. The remaining programs are primarily designed for low-income, working families that have not participated in CalWORKs.
    - California Department of Education administers the State Preschool program
    - First 5 California funds all the county First 5s
    - Finally, GOBiz serves as a cornerstone partner as the lead for the $600 million California Jobs First Program.
    - Child Care and State Preschool Programs Supported With Multiple Funding Sources, the majority of which is funded from non-Proposition 98 General Fund.
- **Counties:** Within counties, especially more populous ones, the different ECE functions are often split:
    - County offices of education bear responsibility for California Department of Education-funded programs like State Preschool; they also typically house the local planning council (LPC), which allows for the local players to coordinate (including adopting a county-specific needs assessment and policy platform)
    - County First 5s fund professional development activities and provide varying levels of wraparound structure by county
    - Resource and referral agencies (R&R) - sometimes multiple per county - connect families to openings, at least within the voucher space; they have inconsistent approaches by county to private and contractor programs. R&Rs also administer workforce training/support to their networks.
    - There are quarterly meetings among Local Planning Coordinators and other representatives of Local Planning Councils, among county First 5s, and among Resource and Referral Agencies across the Bay Area region. This allows agencies that administer the same functions to share updates and conduct some light coordination across county lines. However, the meetings are designed around mutual support and knowledge sharing; there is no requirement for a regional strategy or shared decision-making.
    - County data and IT professionals will be integral in exploring and implementing shared data tools.

- **Local Land Use:** We can work with cities to remove land use and building barriers and to write plans and policies that are child-centered. The Local Government ECE Guidebook is the primary tool for this engagement.
    - Counties. Counties control land use, zoning, permitting, and development standards, and infrastructure in unincorporated areas, and own public buildings and land that could host child care.
    - Cities. Cities control land use, zoning, permitting, development standards, and infrastructure. More so than counties, they offer a more robust set of essential services for employers, workers, and residents.
- **Education and Professional Development Institutions:** Bay Area Community College Consortium/Regional Joint Venture, Bay Area K-16 Collaborative, local California State Universities, University of California campuses, and private colleges and universities in the region. Some of these groups are already working with public high schools to create a pathway into ECE careers for youth.
- **Industry Partnerships:** Businesses are only successful if their employees have dependable and accessible child care. We will work with industry partners (especially sectors prioritized by the BAJFC Steering Committee) to identify ways businesses can support this sector, and in turn their workforce.
- **Research Institutions:** Some of the work in the Activation Plan includes region-specific research about the ECE sector. This type of work can be led by the UC Berkeley's Center for the Study of Child Care Employment (CSCCE), UC Labor Center, and the Center for Cities and Schools. Additionally, groups like Low Income Investment Fund (LIIF), San Francisco Planning and Research (SPUR), and PolicyLink may also be useful resources.
- **Labor Organizations:** Organizations including regional unions, Child Care Providers United (CCPU), Working Partnerships, SEIU, and Greenlining Institute champion worker rights, workplace safety, and in-job career advancement opportunities. Their leadership in the Bay Area initiative continues to shape policy, advocacy, and implementation.
- **Economic Development Organizations:** Regional business organizations, city and county Economic Development Corporations / Departments, Bay Area Council (BAC), Workforce Development Boards, and others, provide crucial connections to industry sectors while supporting business attraction and retention through their public and nonprofit programs. Workforce Development Boards are partners on pathways and supportive services, though current state and federal requirements limit how they can help further the sector.
- **Community Organizations and Leaders:** Ensuring meaningful participation from historically marginalized communities and workers requires dedicated resources and engagement opportunities throughout the planning and decision-making process. This commitment helps prevent past patterns where transformative promises failed to materialize, or decisions occurred without community input while ensuring robust environmental and public health protections.

    - Parent Voices partnered in developing the June 2025 version of this Plan, representing families
    - Additional CBOs will be engaged who represent providers
- **Philanthropy.** We will engage foundations to obtain seed funding for some of the tactics in the Activation Plan.

RESOURCING ACROSS THE SECTOR STRATEGIES

NOTE: These numbers are very rough estimates created based in the June 2025 version of the Activation Plan. Because details of these tactics are nit decided, we are not editing them in this September 2026 update. Costs should be estimated on a project-by-project basis. If and when a robust regional ECE body is established, it can estimate broader implementation costs.

Summary of Total Costs

Implementing the Activation Plan will require sustained investment across public, private, nonprofit, and philanthropic sectors over the next decade, or more. The following tables summarize the costs associated with each strategy, as well as the costs by category.

These are general estimates, which are more useful in understanding the order of magnitude of resources needed for key projects and programs than in setting a target for fundraising. A lot will depend on which projects/programs are selected for implementation, what funding is available and can be leveraged, and who may have the capacity to implement the projects/programs. None of this information is currently at hand. Over the next 15 months, the Sector Investment Coordinator will work closely with All Home, SFOEWD, and the BAJFC Steering Committee to identify priority activities, a staffing plan to support these activities, and a cost estimate for undertaking them.

Costs by Strategy

Strategy	Annual Amount
Strategy A: Workforce	$600,750,000
Strategy B: Access	$3,895,000
Strategy C: Infrastructure	$99,450,000
Strategy D: Process and Structure	$2,300,000
Grand Total	**$706,395,000**

Costs by Category

Category	Annual Amount
Advocacy	$300,000
Ballot Campaign	$4,000,000
Child Care Facilities Fund	$80,000,000
Communications	$650,000
Gap Funding Pilot - Co-Located Child Care and Housing	$10,000,000
Infrastructure Pilot Projects	$3,000,000
Planning and Research	$2,595,000
Regional ECE Advisory Committee	$2,000,000
Shared Services Network Implementation	$100,000,000
Technical Assistance	$1,450,000
Technology	$2,400,000
Wage Reform Implementation	$500,000,000
Grand Total	**$706,395,000**

Strategy A: Workforce has the highest estimated costs due to the inclusion of bold proposals to raise wages for ECE workers through a regional wage scale, and to fund Shared Services Networks. This would take a huge regional paradigm shift and significant public funding. Strategy C: Infrastructure has the next highest associated costs with tactics related to creating a regional Child Care Facilities Fund and funding to develop new child care programs co-located with housing and to pilot other innovative infrastructure development programs. The estimated costs provided above represent high-end estimates. These efforts could begin with smaller investments, as funds are raised, and scale up over time.

Some costs are shared across the strategies. These include communications (developing communications and technical assistance tools for ECE providers and families, and communications campaigns), planning and research, technical assistance for ECE providers, and technology costs to build shared data infrastructure across the region. These core functions of the regional ECE effort total approximately $7 million per year.

Lastly, under Strategy D, there are costs associated with creating and sustaining a regional ECE Advisory Body to ensure the success of all the other strategies and tactics with an estimated annual cost of $2 million per year.

Existing Financing Awarded/Approved and Associated Sources

Through the Bay Area Jobs First Collaborative, Catalyst funding has already been awarded that will support the ECE sector:

- $1.5 million for the High Road to Early Childhood Education Consortium *(Counties of Santa Clara* (lead), *Contra Costa, San Mateo, and Alameda)*

- $717,022 for the East Contra Costa Healthy Homes Collaborative *(will only partly support ECE providers)*
- $300,000 for the Early Care and Education Sector Investment Coordinator work

The **Low Income Investment Fund** administers existing facilities funds in San Francisco and Alameda Counties that could be leveraged to support Strategy C.

Several public funding streams support core ECE services in each county. These include **Federal funds** such as the Child Care and Development Block Grant and Head Start, which funds both ECE slots and quality improvement efforts. **State funds** for ECE slots include State Preschool, funded through Proposition 98 and the State General Fund, General Child Care, and Alternative Payment Program and CalWORKs child care vouchers. State General Fund and First 5 Proposition 10 revenue support quality improvement, family engagement, and other services that enhance ECE. While the activities and services funded through these Federal and State funds can be leveraged and coordinated with this Activation Plan, however, they are already committed to specific purposes and cannot directly fund the tactics in the Plan.

Remaining Funding Required

The proposed costs above include funding for Advocacy and a Ballot Campaign. The intent of these investments is to build public will to invest new public funds in the ECE sector, supporting tactics like the Wage Reform and Child Care Facilities Fund. Through an initial investment of approximately $4-5 million, a successful ballot campaign could yield new revenue at ten times that amount or more.

In the meantime, the Sector Investment Coordinator will explore additional funding sources and partners such as housing developers, Workforce Development Boards, State, Federal, and philanthropic grants, and large employers.

GOALS AND METRICS

Goals

The State Economic Blueprint lays out four key goals to help create, attract, and increase access to good-paying jobs for all Californians. These include:

- Support sustainable and equitable growth across regions and populations
- Invest in the workforce for the sectors of the future
- Create an attractive environment for and with job creators
- Strengthen California's innovation economy and entrepreneurial culture

In addition, the Bay Area Regional Plan is guided by the following key principles and priorities:

- *Job Quality and Access:* Prioritizing stable jobs with safe working conditions that provide good-paying wages, health benefits, worker advancement, and opportunities to increase access. This includes transforming low-road jobs into high-wage, family-sustaining positions.
- *Equity:* Incorporating the needs of diverse communities and marginalized and disinvested populations historically excluded from planning and economic development processes, and engaging them in decision-making.

- *Climate Resilience:* Building carbon-neutral, climate-resilient economies by promoting environmentally sustainable businesses and practices. This involves transitioning to next-generation technologies and manufacturing capacity to take advantage of the clean energy transition.
- *Stakeholder Voice:* Ensuring that economic development strategies are shaped by workers and impacted community members themselves, promoting an inclusive, democratic, grassroots governance approach, and honoring local priorities without losing the power of the region.
- *Economic Competitiveness and Resilience:* Focusing on strategies that help regions leverage emerging opportunities, diversify to navigate economic shocks, compete in the global economy, and bring prosperity to their communities.
- *Transformational Change:* Taking action towards fundamental changes that lead to improved job quality, equity, economic diversification, and climate resilience.

This Early Care and Education Activation Plan identifies four key goals, presented as strategies, to address market failures for both providers and families. These interconnected goals aim to transform ECE . The key goals of the Activation Plan are to:

- Strategy A: WORKFORCE. Transform ECE careers into viable, family-supporting, high-road, high-quality economic opportunities by raising the wage floor.
- Strategy B: ACCESS. Identify and remove barriers for families and caregivers to increase equitable access.
- Strategy C: INFRASTRUCTURE. Provide and enhance the physical infrastructure needed for the sector to sustain and grow.
- Strategy D: PROCESS AND STRUCTURE. Create and provide backbone support to an inclusive and effective Bay Area ECE Sector Investment Implementation Process.

The regional convener and sector coordinator will provide updates to the BAJFC Steering Committee on progress made towards these goals over the next 15 months.

Five to Ten Year Sector-Level Measures

The desired outcomes of the ECE activation plan over the next 5–10 years include systemic improvements across employment, job quality, access, infrastructure, and equity. These long-term outcomes build on the short-term foundational measures and reflect the ultimate goals of the sector transformation. The following are 5–10 year sector-level outcome measures aligned with the plan's strategies:

1. Workforce Growth and Stability

- Increase in total ECE employment across the Bay Area (measured in number of full-time equivalents staff)
- Reduction in annual ECE workforce turnover rates
- Increase in participation in career pathways, including apprenticeships, degrees, and credential programs
- BIPOC, immigrant, and multilingual educators are equitably represented in leadership roles and business ownership.

2. Job Quality and Compensation

- Increase in proportion of ECE workers earning a living wage / Median and wage floor increase for all ECE roles across counties
- Improved benefits access, such as health insurance, retirement plans, and paid leave
- Percent of ECE employers meeting high-road standards for work environments (e.g., staff-child ratios, breaks, planning time)

3. Access and Affordability

- Reduction in unmet child care need across all income brackets and geographies (measured by waitlists, child care deserts, or parent surveys)
- Increase in ECE enrollment rates, particularly for infants, toddlers, and children in BIPOC and low-income families
- Higher percentage of families using subsidized child care who also receive other supportive services (e.g., CalWORKs, Supplemental Nutrition Assistance Program-SNAP)

4. Infrastructure Expansion

- Increase in licensed ECE capacity, especially for infants/toddlers and nontraditional hour care
- Number and square footage of new or renovated ECE facilities
- Increase in ECE programs co-located with housing or community hubs
- Reduction in regulatory barriers to ECE facility development (e.g., average time for permitting and licensing)

5. Systems Integration and Equity

- Regional data systems adoption rate (e.g., Centralized Eligibility List (CEL), Workforce Registry, MyChildCarePlan)
- Improved access to child care for historically underserved communities (e.g., immigrant families, Black families, families with low incomes)
- Equitable distribution of new public investments across counties and populations
- Sustained regional governance structure (e.g., operational ECE Advisory Committee with diverse representation)

These outcome measures provide evidence of structural change and sector health, and they can be tracked through workforce registries, state and county administrative data, provider surveys, and family access data. They also align with the California Jobs First framework's emphasis on quality jobs, regional equity, and resilient economic systems.

Shorter-Term Sector-Level Measures

The short-term measures in the activation plan share several key characteristics that reflect a strategic, phased approach to large-scale system change. The following measures are shared among the strategies:

1. Focus on Capacity Building and System Foundations

Most strategies track early-stage progress such as:

- Creating tools (e.g., cost models, data platforms, inventories)
- Launching new structures (e.g., advisory bodies, shared services networks)

- Piloting programs or partnerships (e.g., gap financing, co-location initiatives)

These measures prioritize laying the groundwork needed to implement and scale long-term solutions.

2. Emphasis on Regional Coordination

Many strategies involve:

- Cross-county participation
- Shared tools or frameworks
- Alignment of planning efforts

This reflects a regional systems approach, aiming to reduce fragmentation and build cohesive infrastructure across the nine counties.

3. Centering Equity and Inclusion

Several strategies incorporate:

- Support for underrepresented groups (e.g., FFN providers, Black early educators)
- Language access and cultural responsiveness
- Navigation supports for families working nontraditional hours or seeking infant/toddler care

This demonstrates a strong equity lens—ensuring that system improvements address the needs of those historically excluded.

4. Policy and Advocacy Infrastructure

The short-term focus for shared policy and advocacy work include:

- Development of and sharing existing model policies or legislation
- Steps toward local and regional ballot initiatives and/or advocacy campaigns
- Establishment of governance or advisory structures

This reflects a strategy to build influence and momentum for future investment and regulatory change.

In summary, the short-term metrics all emphasize foundational progress—tools, structures, and relationships—that enable deeper, long-term transformation in access, workforce development, and infrastructure for ECE.

Reporting on Progress and Measures

Early Indicators of Engagement and Adoption

- Number of participants (e.g., ECE providers, families, counties)
- Tool or system adoption rates
- Completion of planning milestones

These are leading indicators of future impact—suggesting whether stakeholders are engaging and systems are shifting.

Indicators of Long-Term Structural Change (5-10 Years)

This list of measures will be modified depending on what tactics and tasks are prioritized.

- Sustainable public funding is secured and growing
- The "true cost of care" is increasingly covered by public funding—not parent fees. Wage and benefits increases are linked to public funding mechanisms (not passed to families).
- Wages and benefits meet high-road standards
- More educators enter and stay in the field long-term, progressing through career pathways.
- Access and affordability improve across the region
- Families can easily enroll in ECE and access other supportive programs through a unified regional platform.
- Physical infrastructure is built and climate-resilient
- ECE is co-located with housing, transit, and community development projects as a matter of policy and practice.
- Regional governance and accountability are institutionalized - a Bay Area-wide ECE governance structure (e.g., advisory committee or JPA) is operating with consistent funding, inclusive representation, and formal authority.
- Advocacy, funding decisions, and strategic planning are conducted at a regional scale, not just county-by-county.
- ECE is viewed and treated as a public good. ECE is considered essential and is regularly prioritized in state and local policy, planning, and investment.

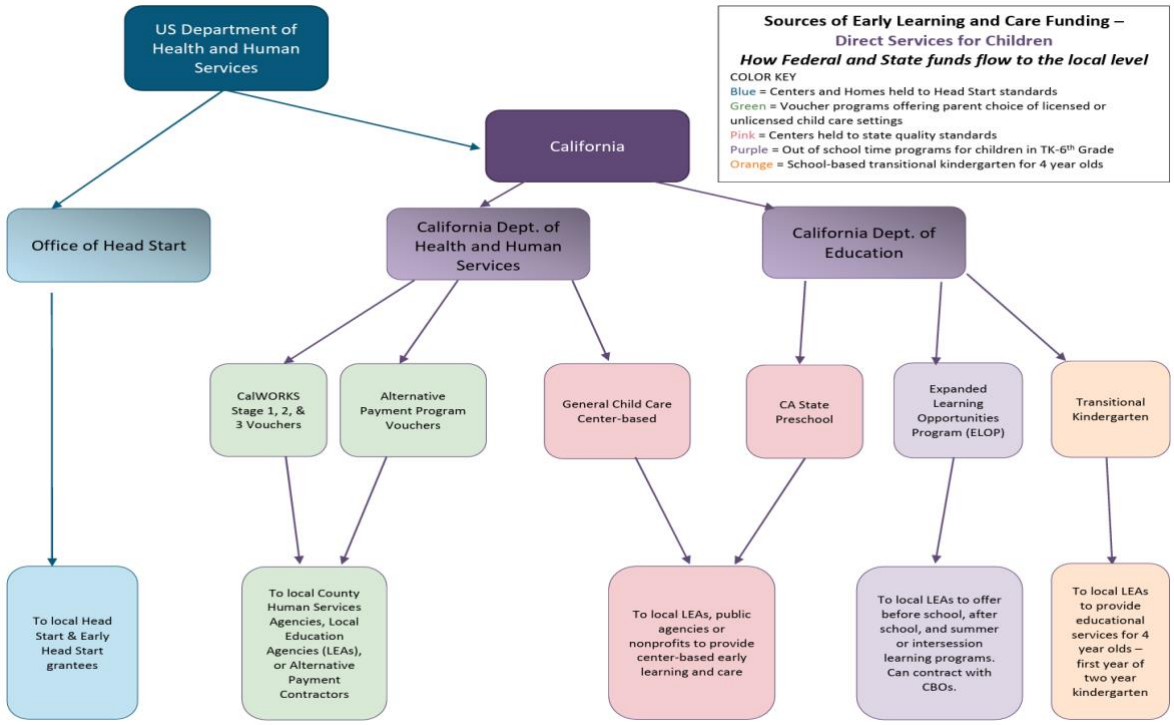
In short, structural change means that ECE in the Bay Area becomes professionally supported, publicly funded, equitably accessible, and systemically integrated—no longer fragile, underpaid, or operating in isolation. The indicators above would reflect a sector that has moved from a patchwork system to a resilient, equitable public service.

DEPENDENCIES AND CHALLENGES

A Complex Early Care and Education Eco-System

The ECE sector in the Bay Area is characterized by multiple layers of local, regional, and state-level governance, with siloed operations across nine Bay Area counties and their respective agencies. Most public funding for ECE is state and federal with the concurrent regulations and policies also dictated at those levels. Within each county, a variety of organizations support ECE providers - such as Child Care Resource and Referral agencies (R&Rs), Local Planning Councils (LPCs), First 5s - and each of these entities engage in their own siloed strategic planning and functions. Negotiations (Child Care Providers United union) over subsidy rates and benefits are state-level only. The following exhibits demonstrate the complexity of ECE programs, funding, and eligibility requirements.

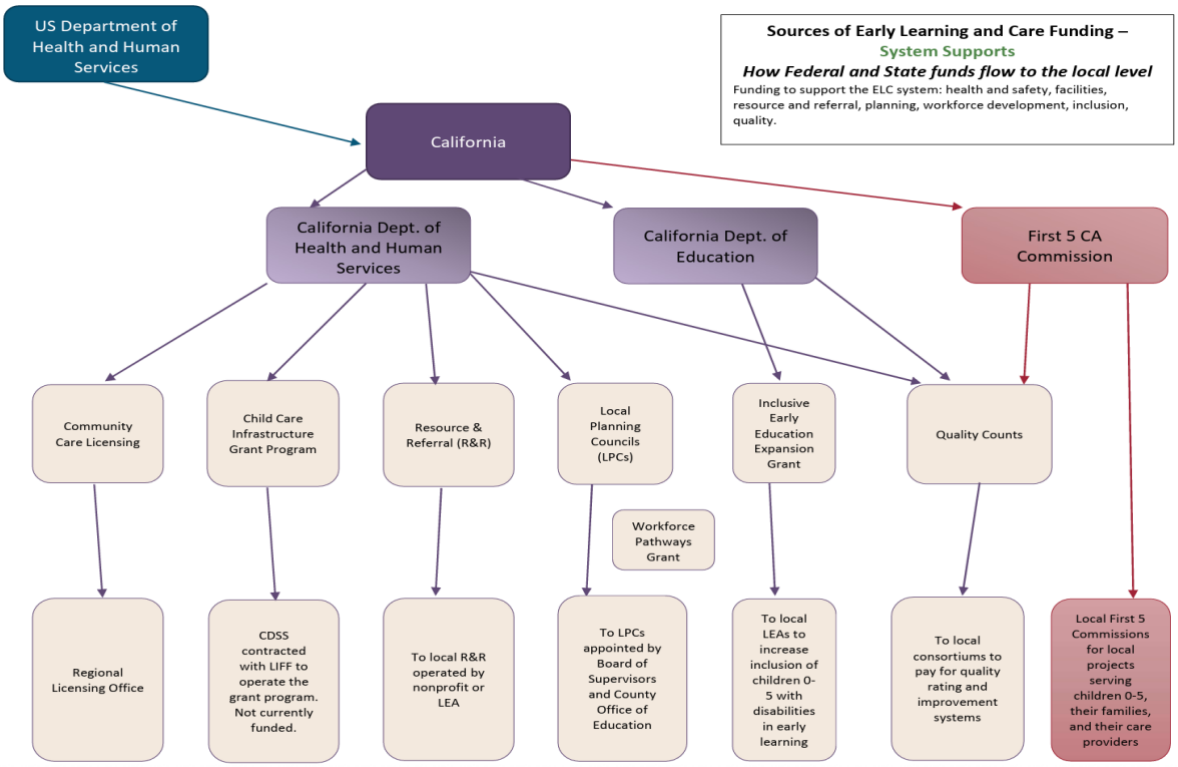
Direct Services for Children Funding Pathways



Source: Sarah Kinahan Consulting

ECE System Support Funding Pathways

Source: Sarah Kinahan Consulting



Public ECE Programs, Funding, & Eligibility Requirements

	Program	Key Eligibility Requirements
CA Dept of Social Services Programs	CalWorks Child Care	• Family earns at or below 85 percent of State Median Income.[a] • Family is currently or formally enrolled in CalWORKs program. • Parent(s) work or are in school. • Child is under age 13. • Slots are available for all eligible children.
	Alternative Payment & General Child Care	• Family earns at or below 85 percent of State Median Income.[a] • Parent(s) work or are in school. • Child is under age 13. • Slots are limited based on annual budget appropriation.
	Migrant Child Care	• Family earns at or below 85 percent of State Median Income.[a] • Parent(s) work in agriculturally related field.[b] • Child is under age 13. • Services are provided throughout the Central Valley. • Slots are limited based on annual budget appropriation.
	Care for Children w/ Severe Disabilities	• Family earns at or below 85 percent of State Median Income.[a] • Child is under age 21 and has exceptional needs.[c] • Program is located in San Francisco Bay Area. • Slots are limited based on annual budget appropriation.
	Emergency Foster Care Bridge	• Limited to children in foster care system and under age 13. • Time-limited child care vouchers until family finds longer-term child care solutions.[d]
CA Dept of Edu Programs	State Preschool	• Family earns at or below the State Median income.[e] • Child is age 3 or 4. • Slots are limited based on annual budget appropriation.
	Transitional Kindergarten	• Child is age 4 by September 2 of the school year. • Slots are available to all eligible children.

Head Start CALIFORNIA

Additional eligibility requirements for the Head Start California Program

Source: Legislative Analyst's Office

With such a complex eco-system, there is risk for misalignment, duplicated efforts, and inefficiencies due to a lack of unified governance or shared planning frameworks. Successful implementation of this action plan requires building consensus across organizations in the nine counties, each with several key agencies. Implementation tasks must consider that these organizations are already operating at maximum capacity and struggle with sufficient funding.

This plan seeks to mitigate these risks by emphasizing stakeholder engagement, shared governance, and joint advocacy efforts to unify disparate local efforts. The creation of a Regional ECE Advisory Committee and backbone support entity to coordinate across counties, agencies, and funding streams will lead to better regional alignment.

Chronic Underfunding of Early Care and Education

Despite the fact that ECE is critical to early childhood development and the ability of parents to go to work, the United States fails to fund the sector as a vital public good. Lack of access to ECE disproportionately impacts women workers - both the ECE providers and women seeking to enter the workforce generally. The current market-based system leads to significant gaps between supply and demand, a lack of ECE facilities, low wages for ECE staff, and the high cost of ECE passed on to working families.

This Activation Plan requires sequenced planning and research, communications, technical assistance and coalition building to achieve the ultimate goals of building public support for ECE and successfully increasing public funds dedicated to this sector. To be successful, the planning and coordination tasks need to be funded first so these activities can support stronger county funding measures and shared regional tools. Ballot measures are becoming more common at the local level with successful efforts in San Francisco, Alameda, and Sonoma Counties providing an example for how a variety of tax measures can support ECE.

Transitional Kindergarten Expansion

Over the past several years, California has been phasing in Transitional Kindergarten (TK) - a new year of public school for four-year-olds - with full implementation in the 2025-26 school year. This new pre-kindergarten program has destabilized the ECE sector as families have enrolled their 4-year-olds in TK, which then decreases enrollment in private and nonprofit programs thereby weakening ECE provider viability.

To mitigate the impact of TK expansion, this plan recommends ways to support providers as they pivot to infant/toddler care through technical assistance, shared services, and facility adjustments. The plan also focuses on building ECE supply for populations with unmet needs (e.g., families working nontraditional hours).

Negative Perceptions of ECE Careers

ECE work is skilled labor; however, the field offers some of the lowest wages in the country. This leads to not enough people entering or staying in the profession. To address supply gaps, the workforce needs to increase as new ECE spaces and programs are created. High turnover and limited career pathways result in program closures or under-enrollment due to unstaffed classrooms.

Labor unions represent a powerful potential for organizing the field. Currently, home-based providers who receive child care voucher payments from the State are represented by the Child Care Providers United union in negotiations with the California Department of Social Services. For ECE workers in center-based settings, union representation is less common except for staff who work for a public school district. Increasing the bargaining power of this group of workers would strengthen the sector overall.

This plan addresses the need to strengthen the ECE workforce through the development of a Bay Area wage and benefit standard, expansion of shared services, and bolstering career pathways. Collective advocacy will drive state investments in compensation and educator well-being.

Shifting Context Since June 2025

The context for this Plan has changed significantly since it was published in June 2025. Progress during the implementation period should be read against these shifts.

Rate reform unfinished. California's transition to a new reimbursement rate structure for subsidized care is still incomplete, with no specific rates yet. How the Bay Area shows up in this process will shape funding for years.

Workforce registry ended. Funding for the state ECE workforce registry has ended. The registry tracked the workforce and anchored professional development services, and California is now one of the few states without one. Some counties are building their own systems. This is a real opportunity for regional collaboration and resource sharing.

New administration. A new governor takes office in 2027, bringing new priorities and staff and requiring relationships to be rebuilt.

Federal scrutiny and administrative burden. Federal concerns about fraud have led to frozen funding, proposed restrictions on access, and new program requirements that add administrative burden for providers.

County progress without regional progress. County funding measures are advancing. They bring needed resources but further entrench county-by-county funding, with no regional progress alongside them.

Transitional Kindergarten fully implemented. With free universal TK fully phased in, many providers have lost four-year-old enrollment and are operating in survival mode, which makes long-term planning harder.

Grant eligibility barriers. Child care is often missing from the eligible uses in state and regional grant programs, even when program goals align. In 2026, the Transformative Climate Communities Round 6 grant program, the guidelines list health clinics as community-serving use, but do not include child care facilities. Other state economic development grant programs did not see child care as a priority piece of building a comprehensive proposal.

These shifts reinforce the direction of this revision: focus regional effort where counties cannot succeed alone and pair it with statewide advocacy.

Addressing Dependencies and Risks

Despite these dependencies, this plan presents an interwoven approach that reflects a recognition that effective ECE system change depends not only on tactical project execution but also on tackling the systemic structural issues—governance, funding, workforce development, infrastructure barriers, and access equity. Each strategy is designed to scaffold on others, with sequenced planning and coalition building seen as prerequisites to long-term success.

EARLY CARE AND EDUCATION TACTICAL WORKPLAN

Fall 2026 updates. Each task now includes its status as of September 2026. Because no implementation funding is committed, timeframes are shown as Short (within one year once funded), Medium (one to three years), Long (three or more years), or Ongoing. "Sector Coordinator" in the Responsible Party column now refers to a role rather than the Spring 2024 to Fall 2026 consultant team: dedicated regional staff, housed with the future host organization, who coordinate implementation on behalf of the nine-county ECE steering committee (see Tactic D.1).

Priority action rows are outlined in orange.

Strategy A: WORKFORCE.
Transform ECE careers into viable, family-supporting, high-road, high-quality economic opportunities by raising the wage floor.

Tactic A.1: Develop high-road standards for ECE wage scales and benefits for the Bay Area.

Purpose: Wages in ECE are structurally low due to the broken child care market and minimal amount of public funding. Poor benefits are also common, with many early educators relying on Medi-Cal for themselves or their children. These economic concerns are core drivers of high turnover of educators and the number one barrier to a high road jobs model. This tactic calls for a pathway to livable ECE wages and benefits.

Program design: Develop a cost model and wage scale in order to identify investments necessary for each part of the Bay Area to improve wages and benefits; extend work by the SCC Catalyst project in strengthening provision of benefits for family child care providers through shared services; and center compensation in advocacy and future funding

Team: CSCCE, Santa Clara Catalyst Project. *Advisors: San Francisco Department of Early Childhood UCB Labor Center.*

Costs: Developing a basic cost model and wage scale would cost approximately $100,000. Implementing wage and benefit programs could cost approximately $50-500 million per county, depending on the scope of the wage scale and size of the county, since current median ECE wages are about 50-60% of a living wage.

Potential metrics: Completion of cost model/wage scale; median ECE wages before/after wage enhancements; access to benefits for family child care providers.

Task	Responsible Party	Timeline
A.1.1. **Cost model and wage scale.** Draw on statewide cost model by Prenatal to Five Fiscal Strategies to create a framework for a Bay Area wage scale that encompasses all critical roles (classroom and otherwise) in ECE birth-to-five settings. • Include learnings from ECE wage supplement projects across California and beyond, including models that honor years of experience as well as educational attainment. • Estimate sustainable models for enrollment and staffing that account for a decline in four- and five-year-olds in centers and FCC programs. • Estimate the funding gap to achieve high-road wage and benefit levels, including interim targets (e.g., $25 per hour wage floor). *Status: Not yet funded. A Bay Area model should build on the state's rate reform cost model once it is final.*	CSCCE, Catalyst Steering Committee California Budget & Policy Center, Children's Funding Project, P5 Fiscal Strategies, County Depts like SF Dept of Early Childhood and Alameda Co First Five who have developed wage enhancement plans	Medium
A.1.2. **Benefits via shared services network.** Prioritize workplace benefits (such as health insurance and retirement) in the development of a shared services network (see **Tactic A.2.1**). *Status: Longer horizon. Scoped to a partner project whose scope changed. Remains a priority (see A.2.1).*	Child Care Providers United, First 5 Santa Clara	Long
A.1.3. **Compensation advocacy and public funding.** Come together as a region to advocate for development of sources of public funding to increase compensation. • Advocate for greater State investments in compensation for publicly-funded programs, incorporating clear mechanisms to increase wages. • Build compensation into any new local ECE funding sources (e.g., regional fund or county ballot measures) by drawing on lessons and successes from counties already implementing wage increases. • Develop a Bay Area unified policy platform on state ECE funding. *Status: Stakeholders named a Bay Area unified policy platform on state funding as the top workforce priority (August 2026). The Bay Area SIC contributed to statewide Early Care and Education Policy Recommendations through the California Jobs First ECE Cohort group.*	California Child Care Coordinators Association (CCCCA) - Bay Area, SCC Catalyst Steering and Advisory Committees, First 5s, BAJFC Steering Committee	Ongoing

Tactic A.2: Expand the ecosystem of support for ECE programs and providers.

Purpose: The ECE sector contains many small businesses with almost no operating margin. They rely on an ecosystem of support that includes resource & referral agencies, First 5s, county offices of education, and more. Each of these entities provides critical buttressing, and any new initiatives should be additive rather than duplicative. Moreover, ECE providers are facing a shifting market as four-year-olds depart ECE sites to enroll in newly expanded public transitional kindergarten (TK) programs.

Program design: To fill in gaps that one agency (or one county) may not be able to address, this strategy focuses on standing up a regionwide shared services network, growing programs for FFN caregivers, and providing technical assistance for a birth-to-three pivot. Cumulatively, this means building on the initiatives under development with the Santa Clara County Office of Education (SSCOE)Catalyst project and adding coordination around pivoting away from an ECE business model centered on four-year-olds.

Team: SCC Office of Education Catalyst team - Advisory Committee, ECE Sector Coordinator (BAM and Center for the Study of Child Care Employment) CSCCE

Costs: A regionwide shared services network would likely require funding from all nine counties, and possibly small fees from providers. The cost of a fully implemented network is unknown but may cost between $20-100m per county at minimum. Expanding FFN-centric programming will depend on the scope determined by the SCC Catalyst project. Finally, a learning community on "going younger" would be the least expensive and would not need to continue beyond a few years, for perhaps $200,000 per year.

Potential metrics: Launch of new initiatives, then enrollment/participation in those initiatives.

Task	Responsible Party	Timeline
A.2.1. **Shared services network.** Building from county and Catalyst project lessons, establish scope for a staffed shared services network. • Establish adequate staffing and operational support for procurement and implementation at the agency that operates the network. • Explore opportunity of including center-based programs (particularly small, standalone ones). • Determine a county cost-sharing model that enables all 9 counties to participate and provide free or highly subsidized participation for ECE sites. • Start with pooled back-office functions, such as payroll, benefits administration, and shared procurement, as a low-risk entry point.	Child Care Providers United, First 5 Santa Clara	Long

Status: Longer horizon. Scoped to a partner project whose scope changed. Stakeholders kept a shared services network as a top workforce recommendation (August 2026).		
A.2.2. **Home-based provider investments.** Build from the foundation of the Catalyst Project to strengthen the region's support system for family child care and family, friend, and neighbor (FFN) caregivers. • Expand or scale up coverage of new initiatives to reach the full Bay Area, such as the FFN work group, navigational support, and data collection. • Prioritize supportive programs for immigrant caregivers. • Prioritize supportive programs for caregivers who have been historically excluded from early care investments, especially Black FFN providers and caregivers. • Provide technical assistance (TA) and small grants to FFN caregivers to ensure that their homes are safe and enriching for children. *Status: Catalyst activities in Alameda County.*	SCC Catalyst Project Team, with consultation from: Home Grown, FFN Learning Community	Medium / Ongoing
A.2.3. **Birth to three pivot.** In light of Transitional Kindergarten expansion, facilitate the sector's pivot to serving more children from birth through age three. • Establish a "Going Younger" learning community to gather practitioners and create networks of support. • Create and deploy technical assistance materials for a pivot, such as a) facilitating infant/toddler license applications, b) classroom conversions, c) staff retraining. • Develop a communications strategy to aggregate and share out successful practices and lessons learned (e.g. newsletter, bi-annual webinar, etc.). ***Status: Moved. CSCCE conducted "Going Younger" focus groups and research and published a policy brief on the birth-to-three pivot, followed by a webinar series in fall 2026.*** • Can't Compete With Free: How Transitional Kindergarten Has Destabilized California's Child Care Sector	CSCCE, R&R regional group, with consultation from: Zero to Three, Community Care Licensing, Bay Area K-16 Collaborative	Short
A.2.4. **Advocacy and public funding for sector support.** • Advocate for deeper support and funding from the state for regional coordination, such as another round of Universal Pre-Kindergarten (UPK) Mixed Delivery grants. • Push for state funding and technical assistance to support authentic mixed delivery of UPK (i.e. funding that goes beyond districts and county offices) and a sector pivot to birth to three.	LPC Association, Catalyst Steering Committee, F5s, Bay Area Jobs Steering Committee	Ongoing
A.2.5. Provider business viability. Strengthen the business side of ECE, separate from wages, especially for home-based providers.	CSCCE, R&Rs, Children's Council of San Francisco,	Medium

Expand business training and coaching through FCC incubators and models such as BizNest (Children's Council of San Francisco). Build on CSCCE research on how family child care providers sustain their businesses. *Status: New in this revision. CSCCE research underway (fall 2026).*	Workforce Development Boards	

Tactic A.3: Promote high-road standards for ECE work environments.

Purpose: Work with young children is emotionally and physically challenging, and programs rarely have funding to address the quality of working environments for their staff. After wages, challenging work environments are a top driver of turnover among the ECE workforce. However, there are robust guidelines already available which could be used to spur conversation and action around addressing this issue.

Program design: Convert existing educator-developed standards for quality working environments into action via convenings, communications, and technical assistance.

Team: Sector Coordinator / CSCCE

Costs: Creating communications and technical assistance tools would be an upfront cost of $50,000-150,000, depending on scope. Quarterly convenings and related technical assistance would cost approximately $150,000 per year.

Potential metrics: Membership and meetings for work environments partners; materials created

Task	Responsible Party	Timeline
A.3.1. **Convenings focused on work environments**. Assemble a regional ECE Work Environments group to meet quarterly. The group should include both center- and home-based educators, with a subcommittee focused on each setting. *Status: Moved. Model work standards focus groups with educators and a regional work environments convening with the Alameda County Office of Education (Hayward, August 2026).*	CSCCE	Medium
A.3.2. **Communications.** Develop a messaging campaign to promote strong ECE work environments using CSCCE's revised ECE Model Work Standards to raise awareness among workers and ECE employers. *Status: Not yet funded. Will partly occur with the CSCCE fall 2026 release of their updated work standards.*	CSCCE, Bay Area First 5s	Short

A.3.3. **Technical assistance.** Create and disseminate tools for assessing and improving work environments, which could be incorporated into site quality improvement activities. *Status: Moved. CSCCE updated the ECE Model Work Standards to incorporate high-road job principles and developed three work environment toolkits, for center directors, educators, and ECE backbone organizations.*	CSCCE, R&R regional group	Ongoing
A.3.4. **Advocacy and public funding**. Advocate for supportive working conditions as a priority in state-level funding. • Push to incorporate educator well-being in state-driven investments in quality improvement. • Explore new avenues to establish high road norms for ECE working environments at the regional or state level, such as a labor standards board.	LPC Association, Catalyst Steering Committee, F5s, Bay Area Jobs Steering Committee	Ongoing

Tactic A.4: Bolster pathways programs for entry into and advancement in the ECE field.

Purpose: Due to high teacher turnover, vacancies are abundant in ECE and many programs operate below capacity due to inability to fill positions. Moreover, it is impossible to expand access to care to more families when programs cannot even maximize current operations (let alone expand). Barriers to entry-level jobs in ECE are quite low, but nonetheless, there are not enough individuals entering the field and even fewer who continue on and earn vital degrees and certifications. Bolstering pathways into and through ECE careers are vital to countering these forces. Moreover, since ECE wages are so low, pathways must be low cost or free and fit the needs of working professionals in order to be successful.

Program design: Assess the current state of pathways and identify models to scale up or replicate; advocate for funding to make expansion possible and available to more early educators.

Team: CSCCE, Bay Area Community College Consortium, SCC Catalyst, Bay Area Workforce Development Boards, Bay Area K-16 Collaborative

Costs: A landscape scan may cost between $50,000-150,000, depending on how many levers are tracked and the level of detail required.

Potential metrics: Completed landscape, number of individuals served in different pathways, number of counties participating in each type of pathway program

Task	Responsible Party	Timeline
A.4.1. **ECE Pathways landscape/inventory.** Build from efforts begun by the Bay Area Community College Consortium and Catalyst project to assemble a complete landscape analysis of pathways into ECE, including degree programs, apprenticeships, and Career Technical Education (CTE)/ Regional Occupational Program (ROP) initiatives. • Identify gaps in offerings and their geographical distribution, as well as opportunities for Spanish language cohorts, B-3 coursework, and other regional priorities, while also ensuring culturally responsive pathways for Black, Indigenous, and other historically excluded educators. • Consider expanding the inventory to include other key workforce supports that counties are funding such as stipends. • Coordinate pathways regionally, since counties share ECE students and institutions of higher education across county lines. *Status: Catalyst project, and LIIF completed an internal landscape inventory. Efforts to build on: ECEPTS sponsors apprenticeships in six of the nine Bay Area counties; the San Francisco Department of Early Childhood funds 15 pathways from high school and GED through degrees; the Santa Clara County Office of Education is building pathways from pre-apprenticeship to teacher credentialing; and the Bay Area Community College Consortium offered to continue this work.*	CSCCE, Bay Area Community College Consortium, Bay Area K-16 Collaborative (potentially ACCCTEP) With input from EdVance College, Learning Policy Institute	Medium
A.4.2. **Scale and grow successful models.** Identify programs that can expand or be replicated to serve more individuals or regions within the Bay Area: • Apprenticeships, CTE, and ROP • FCC incubators (Child Care Initiative Project, BizNest) • Permitting and credentialing programs *Status: Not yet funded.*	CSCCE, Bay Area Community College Consortium, Bay Area K-16 Collaborative With input from First 5s, Children's Council, R&Rs	Long
A.4.3. **Leverage Workforce Development Boards (WDB).** Workforce Development Boards are not positioned to fund ECE wages at scale. Focus on the supports WDBs can already provide to early educators and home-based providers. • Connection to and scholarships for training pathways • ECE-specific registered apprenticeship program • Support services (transportation, child care stipends, tutors, etc.) • Small business and self-employment support for home-based providers, who operate most licensed sites in the region.	Sector Coordinator, Bay Area Good Jobs Partnership for Equity (BAGJPE)	Ongoing

• WDB participation in county Local Planning Councils and referral relationships with resource and referral agencies. *Status: Moved. Surveyed Bay Area Workforce Development Boards, held several gatherings including with the State Workforce Development Board, and published* Workforce Development Boards and Early Care and Education: A Primer for the Bay		
A.4.4. **Pathways advocacy and public funding.** Develop funding to sustain and grow ECE pathways in the Bay Area. • Estimate funding necessary to replicate or grow current programs and identify existing funds that may be available. • Develop a regional scholarship fund concept and potential funding sources. • Identify sources of funding to facilitate ongoing coordination among higher education institutions and other pathways partners.	LPC Association, Catalyst Steering Committee, First 5s, Bay Area Jobs Steering Committee	Ongoing

Strategy B. ACCESS.
Identify and remove barriers for families and caregivers to increase equitable access.

Tactic B.1: Reimagine the Local Planning Council's Child Care Needs Assessments as a regional tool to identify gaps and serve as a marker of progress.

Purpose: Each county has a Local Planning Council (LPC) that is mandated to complete a child care needs assessment every five years. LPCs utilize a common template provided by the California Department of Social Services (CDSS). Reimagining the needs assessment as a regional tool would allow for pooling resources to collect and update data more frequently, identify regional ECE gaps, and track shared metrics related to access, the ECE workforce, and ECE infrastructure.

Program design: Identify how existing processes for needs assessments can be made more efficient, leverage shared resources, and be better supported through additional funding. The tool will address equity gaps within and across counties and help guide resources to underserved communities. Co-create a regional tool with guidance from LPCs to build buy-in and shared leadership of the project. Make sure the regional tool is a "value add" for LPCs.

2026 update: *A regional needs assessment received the strongest support of any recommendation tested with stakeholders in August 2026 and is the leading candidate for a first regional deliverable (see Tactic D.1). Stakeholders set conditions: agreed governance principles and methodology; a regional assessment that complements, rather than replaces, county LPC needs assessments; and a scope that covers access, workforce, and facilities. LPC assessment cycles are set in statute and staggered across counties, so timing must be coordinated.*

Team: Sector Coordinator working with LPC Association and CDSS

Costs: Conduct planning and coordination activities ($50,000 annually); Technology Platform ($300,000 one-time cost to design/build; $300,000 annual cost to maintain); Stipends for LPC coordinators for training and collaboration time ($45,000 annually), other costs TBD.

Potential metrics: A shared tool is created. Sustainable funding is in place for data systems. Metrics on the utilization of the tool.

Task	Responsible Party	Timeline
B.1.1. **Streamlined Regional Needs Assessment framework**. Start with a scoping study: talk with all nine counties about what they would want from a regional needs assessment, including governance, methodology, and how it would complement county LPC assessments. Then define common metrics, data sources, and success benchmarks for ECE access, workforce, and facilities, including the identification of child care deserts. *Status: Proposed to the CCCCA Bay Area chapter (November 2025). Solano and Napa sought joint funding for a cross-county assessment without success. Strongest stakeholder support of any recommendation tested (August 2026). The scoping study is estimated at $30,000 to $60,000 depending on scope. Not yet funded.*	Sector Coordinator, LPC Association, First 5s, R&Rs, CDSS	Short (Scoping Study) then Medium
B.1.2. **Tracking tool.** Develop a tool that tracks and communicates progress on metrics and benchmarks.	Sector Coordinator, LPC Association, CDSS	Medium
B.1.3. **Pooled investment.** Identify funding sources and funding gaps for joint investment in data systems and contracts needed to support regional and county-specific needs assessment work (e.g., ELNAT, Workforce Registry).	Sector Coordinator, LPC Association, CDSS	Short

Tactic B.2: Explore ways to generate ECE funding at a regional level.

Purpose: The ECE sector is chronically underfunded due to the failure of the market to provide enough affordable care for families while at the same time paying living wages for staff. Some cities and counties have been successful in raising dedicated ECE funds through mechanisms like ballot measures and employer contributions. Many barriers to access can be traced back to insufficient funding for the sector. Sustainable

funding for ECE requires a region-wide advocacy effort to transform the funding structure for child care to mirror that of the public education system and to recognize child care as a critical public good.

Program design: Ensure funding will cover much-needed infrastructure to improve access, increased wages for ECE staff, and make subsidized care available to more families.

Team: Sector Coordinator with support from LPCs, First 5s, R&Rs, Catalyst, Build the Future (Santa Clara), Funding the Next Generation.

Costs: Personnel time to conduct planning activities ($100,000 annually for salary and benefits); Communications Firm and Comms expenses ($250,000 annually); other costs TBD.

Potential metrics: Inventory of potential funding mechanisms. Reach of communications campaigns. Number of employers engaged.

Task	Responsible Party	Timeline
B.2.1. **Cross-county learning and shared tools.** Build on county funding successes through cross-county learning and shared tools, rather than a single regional ballot measure. • Convene a learning cohort of counties with and without dedicated ECE funding. • Create a formalized approach to share templates, tools, and messaging across counties, adapted to local needs. • Let counties without dedicated funding buy into tools and programs built by counties with measures, at marginal cost. • Plan for renewal as existing county measures approach expiration over the next decade. *Status: Ballot measures are moving at the county level. San Francisco, Alameda, and Sonoma are implementing dedicated ECE funding measures, and two other counties have allocated general revenue to child care. Marin's Measure P is on the November 2026 ballot. A Napa County measure is not moving forward. Opportunity for shared learning and resources among these and the other counties.*	Sector Coordinator Support: Funding the Next Generation	Ongoing
B.2.2. **Public awareness campaigns.** Scale up campaigns that promote the importance of ECE to the region (to families, to economic growth, etc.) with the intent of building momentum towards ballot measures into more counties and geographies. *Status: San Mateo County's Catalyst project developed shared R&R messaging.*	Sector Coordinator Support: from LPCs, First 5s, R&Rs, Catalyst, Build the Future (Santa Clara).	Short

B.2.3. **True cost of care.** Build on the success of models like San Francisco's where city-subsidized care covers the true cost of care to support high-road jobs in ECE.	Sector Coordinator Support: SF Dept of Early Childhood and Alameda Co First 5	Long
B.2.4. **Employer support.** Collaborate with other Bay Area Jobs First sectors around employer support/funding for child care for employees. *Status: Moved. Partnered with Santa Clara County's Build the Future and Working Partnerships USA on an employer solutions convening; co-hosted a webinar on ECE and economic development with the statewide California Jobs First ECE cohort; Local Government ECE Guidebook includes employer recommendations.*	Sector Coordinators	Ongoing

Tactic B.3: Address access gaps by building ECE supply for targeted populations.

Purpose: A review of ECE plans from organizations in the nine Bay Area counties reveals specific access gaps for families working non-traditional hours, for infants/toddlers, and for families seeking home-based child care. These represent some of the access gaps for families. A new, regional needs assessment (see B.1) would likely reveal other gaps by family race/ ethnicity, linguistic isolation, tribal membership, location and place type (rural, suburban, and urban), immigration status, and socio-economic status.

Program design: Supply building efforts should be data-driven based on where (geography and program type) and when (evening, weekend hours) families need care. Solutions should be coordinated with the Santa Clara Catalyst ECE Project and Jobs First projects related to caregiving in other regions. Program design should draw on insights from families themselves through stakeholder engagement and work with organizations like Parent Voices.

2026 update: *Stakeholders recommended treating supply building for targeted populations as county-led work with regional support. They also elevated non-traditional and flexible hours as a priority. Work schedules have diversified well beyond Monday to Friday, 8:00 to 5:30, so some families need less than full-time care while others need care well outside standard hours. Supply conditions differ by county, and better data is needed to guide investment.*

Team: Sector Coordinator with support from R&Rs and Catalyst.

Costs: Conduct planning activities ($50,000 annually); Development of technical assistance materials ($50,000). Other costs TBD.

Potential metrics: Increase in child care during nontraditional hours. Increased support for FFN providers. Number of preschool spaces converted for infant/toddler care.

Task	Responsible Party	Timeline
B.1.1. **Non-traditional and flexible schedules.** Scale up models for ECE at nontraditional hours or flexible schedules by identifying strong examples and opportunities to expand licensed care options (e.g., Palcare). *Status: Elevated as a priority by stakeholders (August 2026). A 24/7 child care center is in conceptual development in San Francisco.*	Sector Coordinator, Child care providers	Medium
B.1.2. **Family, Friend, and Neighbor care.** Work with the Catalyst project to expand their pilot family, friend, and neighbor (FFN) resources and models to the full Bay Area region to fill access gaps.	Sector Coordinator and Catalyst Steering Committee, Child Care Providers United	Medium
B.1.3. **Pivot TA for Providers.** Facilitate the ECE sector's pivot from preschool to serving more children from birth through age three through funding and technical assistance. *Status: See A.2.3. CSCCE research, policy brief, and webinar series.*	Sector Coordinator Support: R&R regional group, Zero to Three, Community Care Licensing	Short

Tactic B.4: Create and adopt common data systems and tech platforms for family- and provider-facing functions across the Bay Area to simplify application and enrollment in ECE and other family-supportive programs.

Purpose: Currently, families seeking financial assistance with child care costs must contact multiple agencies in each county to learn about and apply for available subsidies. Families may qualify for other means-tested services (i.e. SNAP, Women, Infants, and Children nutrition program-WIC, Medicaid, etc.) but do not automatically qualify for subsidized child care. Families would benefit from a centralized application system across the Bay Area region because it would save them time researching subsidized options and the burden of applying to different programs. Create a single point of access, rather than one or more points of access per county.

Program design: System re-design will center the needs and considerations of families to reduce administrative burden and streamline navigation of subsidized ECE programs.

2026 update: *Stakeholders asked to separate two distinct goals in this tactic: (1) data sharing and shared procurement among counties, and (2) simpler family navigation, including centralized eligibility. The end of the state ECE workforce registry has made shared data infrastructure more urgent. Counties are building separate systems: San Francisco has operated centralized eligibility for about ten years and offers a parent portal that shows real-time openings, and Alameda is building its own system. Counties with dedicated funding that build robust systems could let other counties buy in at marginal cost.*

Team: Sector Coordinator in close alignment with Alternative Payment Program providers and state-contracted preschool and child care programs. R&R Association and CDSS and CDE. County staff in HHS, Welfare, etc.

Costs: Personnel time to conduct planning and training activities ($500,000 for salary and benefits annually); Technology/Data Integration Platforms ($1-2 million); other costs TBD.

Potential metrics: Technological platform developed. Trainings delivered to staff using the CEL. Number of families applying and enrolling. Number of referrals to other supportive family services. Data-sharing agreements in place.

Task	Responsible Party	Timeline
B.4.1. **Background research and process** ● Map the use of data systems pertaining to providers, centralized eligibility, and child data across county offices of education and resource & referral (e.g. Workforce Registry, Hubbe, Noho, Vertical Change). Identify systems gaps by county and for the region as a whole. ● Determine the set of common data systems and tech platforms needed for the next five or ten years. ○ Consider scaling up robust data systems for regional centralized eligibility and enrollment (e.g. Early Learning SF) ○ Identify a timeline needed to grow or replace funding for existing infrastructure (e.g. declining funding for the Registry and other systems supposed via Quality Counts) ● Estimating the cost of shifting to a regional set of data system(s)--both for the transitional phase and for the ongoing budget to maintain a shared system at scale. Determine optional procurement and funding strategy to provide service to the full Bay Area region.	CSCCE, LPC Assn, R&R regional group, First 5s	Short
B.4.2. **Centralized eligibility list.** Develop a single, centralized eligibility list (CEL) for the Bay Area, either by combining or scaling up ones developed in one or more Bay Area counties so families can access and enroll in care through one system regionwide.	Sector Coordinator, Alternative Payment Program providers, state-contracted	Long

	preschool and child care programs.	
B.4.3. **CEL adoption.** Train and support Alternative Payment Program (APP) staff who use the CEL in all nine counties.	Sector Coordinator, Alternative Payment Program providers, state-contracted preschool and child care programs.	Long
B.4.4. **Link myChildCarePlan integration.** Link MyChildCarePlan or a similar database directly to the regional CEL so families can move seamlessly from reviewing a list of all ECE programs to reviewing and applying for subsidized openings.	Lead: Sector Coordinator Partners: R&R Association, CDSS	Medium
B.4.5. **Data-sharing agreements.** Create data-sharing agreements between county departments and child care subsidy programs to ensure seamless transfer across programs and to reduce administrative/documentation burden on families.	Lead: Sector Coordinator Partners: APPs, State-contractors, County departments	Medium
B.4.6. **Other family-supportive benefits.** • Advocate for automatic ECE subsidy eligibility for families who receive other social service programs • Provide resources to APPs to support staff in providing education and eligibility screening support for other family-supportive benefits and programs such as CalWORKs, SNAP, Medi-Cal, Paid Family Leave, WIC, etc.	Lead: Sector Coordinator Partners: R&Rs, LPCs, First 5s, Parent Voices, CAPPA, unions (CCPU, SEIU 521, SEIU 1021). Child care providers.	Ongoing
B.4.7. **Shared data infrastructure and procurement.** Explore joint procurement and data governance across counties, including a shared regional approach to tracking the ECE workforce now that the state workforce registry has ended. Counties could jointly contract one vendor rather than each building separate systems. *Status: New in this revision. Raised by stakeholders (August 2026). No lead identified.*	TBD but Local Planning Councils are a possibility	Medium

Tactic B.5: Develop regional resources to support Child Care Resource and Referral (R&R) capacity and enhance MyChildCarePlan to make it easier for families to find ECE programs.

Purpose: Every county has one or more R&R agencies, funded by the California Department of Social Services (CDSS), whose purpose is to act as a single go-to source for families to find providers that meet their distinct needs, while helping ECE providers advertise openings and services. R&Rs use MyChildCarePlan, an online child-care matching platform funded by CDSS which has a profile for every licensed child care provider in the state. This existing infrastructure can be leveraged and enhanced to address family navigation challenges.

Program design: Scale up existing efforts such as the work of the Child Care Resource Center and the SCCOE Catalyst to expand resources and tools for R&R agencies.

Team: Sector Coordinator in partnership with Resource and Referral Agencies, CDSS, Catalyst.

Costs: Conduct planning activities ($250,000 annually); technology costs ($100,000); language translation costs ($100,000); comms costs ($100,000); other costs TBD.

Potential metrics: Number of new resource materials. Increased information for families in their home-language. Number of families receiving referrals. User satisfaction both parents and providers

Task	Responsible Party	Timeline
B.5.1. **Pooled resources.** Identify opportunities for pooled resources to support R&R agencies, perhaps by stronger funding and expanded capacity for the work led by Connecting California Families (Child Care Resource Center - CCRC/BANANAS). *Status: A Catalyst-funded a San Mateo County report: Family Navigation: Promising Practices for Child Care Resource and Referral Services. The State R&R Network has offered to help spread effective practices statewide.*	Sector Coordinator CCRC	Short
B.5.2. **Information campaigns.** Support and amplify R&R information campaigns about subsidy access.	Sector Coordinator, R&R Association, Alternative Payment Programs	Ongoing
B.5.3. **Language inclusion.** Develop a regional plan for greater language inclusion and staffing to support R&R agencies that do not have the individual capacity to cover additional languages. *Status: Not yet funded.*	Sector Coordinator R&R Association	Medium

B.5.4. **One parent portal.** Provide one portal for parents that combines the information on licensed care in MyChildCarePlan with information on TK at local school districts. *Status: San Mateo County's Catalyst project is building a high-quality R&R website that other counties could join at incremental cost.*	Sector Coordinator, R&R Association, School Districts CDSS	Medium
B.5.5. **Cultural Responsiveness & Equity.** Ensure that R&R agencies are resourced and trained to meet the needs of families historically excluded from mainstream systems—including Black families—by providing culturally responsive outreach, materials, and navigation support. This includes addressing trust barriers, building partnerships with Black-led organizations, and offering trainings that go beyond language inclusion to acknowledge systemic disparities in access and engagement. *Status: Nothing explicitly started, but all work thus far aims to have an embedded racial equity approach throughout.*	Bay Area K-16 Collaborative (identify faculty for PDs/trainings)	Medium

Strategy C: INFRASTRUCTURE. Provide and enhance the physical infrastructure needed for the sector to sustain and grow.

Tactic C.1: Establish a dedicated Child Care Facilities Fund for the nine-county Bay Area and ensure ECE providers have access to robust technical assistance to successfully complete facilities development projects and sustain their businesses.

Purpose: The Bay Area, like most regions in California, has a chronic and severe lack of licensed ECE supply, especially for infants and toddlers. The physical infrastructure, including ample indoor and outdoor space, is a critical component of supply building to meet these community needs. To further support expansion of physical infrastructure ECE operators must have access to necessary technical assistance (TA) and expert guidance to successfully complete projects.

Program design: A fund, potentially administered by an intermediary, would offer a variety of financial products such as grants and loans to ECE operators. Some local funds already exist and could be leveraged, including the Child Care Facilities Fund in San Francisco and the new Alameda County Facilities Fund. Santa Clara, San Mateo and Alameda Counties have also funded efforts to improve and expand the supply of

licensed ECE in their communities while Sonoma County has recently passed a measure supporting early childhood. Tailored to the needs of ECE providers, TA should take a collaborative approach and include financial viability and capital planning, regulatory navigation, loan financing support, and real estate and facilities development best practices.

2026 update: *With three counties now implementing dedicated ECE funding measures and others considering them, the near-term focus shifts to ensuring each county measure includes facilities funding and technical assistance. A regional facilities fund remains a longer-horizon goal.*

Team: Public agencies or a regional entity working with a financial intermediary with deep expertise managing similar funds. Support from child care support organizations, elected officials and private and public funders will also be essential. Community Development Financial Institutions (CDFI's) and other local child care support and advocacy entities like Build Up for San Mateo County's Children are composed of expert teams, bridging child care, finance, and real estate sectors – offering cross-sector knowledge to successfully support providers.

Costs: To expand and sustain ECE supply in the Bay Area, a fund where $60-80 million would be administered annually would begin to address regional needs. This fund could be a mix of public, private, and philanthropic sources. Dedicated TA funding would be included as a component of the fund and would cover such costs as: TA consultant contracts; training materials, workshops, and one-on-one support; and administrative support for provider outreach and program management. Costs to fund prior steps to get to a regional revenue measure would range from $100k to develop and disseminate TA on converting pre-k spaces to infant-toddler spaces, to $4 million to run a large-scale ballot initiative campaign which includes developing polling, gathering signatures, etc.
(We are assuming a cost calculation of $0.88 per registered voter. There are 4,569,484 registered voters in the 9-county Bay Area)

Potential metrics: (1) Number of children served through a commensurate number of ECE spaces created, or enhanced, (2) Amount of funding invested in ECE facilities, (3) reduction in financial barriers for providers making improvements, (4) leverage ratio of public to private/philanthropic funds, (5) speed and efficiency of fund distribution (compared to conventional financing) (6) number of providers receiving TA, (7) number of TA hours provided and (8) reduction in regulatory delays, and perceived value of TA (monitored and evaluated via surveys and interviews).

Task	Responsible Party	Timeline
SC.1.1 Facilities funding scan. Survey each of the nine counties to understand where they are in securing facilities funding commitments from public agencies, private investors, and philanthropies, and assess relevant regional and county-specific funding measures. Compare the characteristics of each local effort, including existing technical assistance efforts in each county.	**Lead: Sector Coordinator** **Partner: Input from local First 5s, Planning Councils, etc.**	Short/ Ongoing

Status: Partially complete. Sonoma, Alameda, and San Francisco are implementing ballot measures that include facilities funding, and LIIF administers that funding in each county, including technical assistance. LIIF has also taken part in ballot measure discussions in three other counties and urged the inclusion of facilities. Marin has a measure on the November 2026 ballot. San Mateo has allocated county sales tax funding to child care facilities, Santa Clara has allocated ARPA dollars to facilities, and Contra Costa is providing on-call technical assistance for the facilities needs of younger children. In Sonoma, LIIF also surveyed providers on their facilities needs to guide implementation of the county's measure. • ***Recommendation:*** *As counties explore ballot measures, they need to understand providers' facility needs. Allocate funding for facilities needs surveys in counties that have not conducted one.*		
C.1.2. **Revenue generation research.** Research revenue generating capabilities in each county. *Status: Complete. LIIF conducted a scan of existing, proposed, and under-discussion ballot measures.*	Lead: Sector Coordinator Partner: Existing local, regional and state revenue efforts (First 5, Association of Bay Area Governments (ABAG), Metropolitan Transportation Commission) would supply information and feedback on local revenue generating efforts. Funding the Next Generation assists local communities seeking to raise funds for children and could be instrumental here.	Short
C.1.3. **Facilities fund plan.** Develop a 5-7 year plan using recommendations to identify local and regional efforts most ready for activation. *Status: Not complete. This task was written for a longer timeline; the scan of existing ballot measures is complete.* • ***Recommendation:*** *Using data from facilities surveys, each county could develop a plan for funding facilities.*	Lead: Sector Coordinator with SCC Catalyst Project Partner(s): Input and feedback from local First 5s, Planning Councils and R&Rs, Parent Voices, CCPU, etc. Funding the Next Generation assists local communities seeking to raise funds for children and could be instrumental here.	Medium
C.1.4 **Campaign development.** Develop partners and campaign for a regional ballot measure that includes physical infrastructure.	Lead: Campaign coordinator	Long

Status: Beyond the timeline of this implementation period. *Recommendation: This requires further study and may not be a high priority for further work.*	Partners: Elected officials, unions, private funders, campaign consultants, child care support organizations, parent organizing groups, etc.	
C.1.5 **Community of practice.** Build a community of practice, including peer cohort forums, sessions with regulatory experts, and dissemination of case studies and best practices. To address the pivot to caring for more infants and toddlers, disseminate resources and provide TA on conversion of pre-k to infant-toddler spaces. Build a network of local facilities champions, modeled on the Central Coast Child Care Facilities Action Network, who can carry the Local Government ECE Guidebook to their cities and counties. *Status: Partially complete. LIIF is working with four counties on converting spaces for younger children and participated in CSCCE trainings on facilities needs for the birth-to-three pivot. The Local Government ECE Guidebook covers best practices for supporting child care through regulation and planning.* • ***Recommendation:** Develop a multi-county community of practice that trains local facilities experts, similar to the Uplift Child Care Coalition.*	Lead: Sector Coordinator with SCC Catalyst Project Partner(s): Input and feedback from local First 5s, Planning Councils, R&Rs, Parent Voices, CCPU, etc. Funding the Next Generation assists local communities seeking to raise funds for children and could be instrumental here.	Short

Tactic C.2: Center children in community planning processes by promoting supportive land-use policies, improving design standards and aligning regulations and approval processes.

Purpose: The Bay Area has 109 local jurisdictions (cities and counties) each with its own land use and zoning regulations, building standards, approval processes and fees. The mission of local, regional, state and federal agencies is not always aligned, although sometimes that is intentional, to strengthen checks and balances. Support for new ECE spaces in existing communities also varies widely. Given all this, the Bay Area must engage all relevant jurisdictions, regulatory agencies and communities in service of increasing and sustaining the supply of community-based ECE. Engagement and transparency can build trust and strong partnerships among stakeholders as they collaborate on aligning and streamlining regulations, firecode, and approval and permitting processes. Addressing this challenge is important to creating a predictable and stable environment that facilitates greater licensed supply of ECE. Also, children's needs should be incorporated into infrastructure and climate resilience planning by creating safe transport among community anchors, prioritizing funding to ensure these spaces are protected from climate threats and improving design standards to improve children's health and safety.

Program design: (1) Develop model zoning, permitting and fire code language, (2) engage stakeholders and build coalitions for advocacy, and (3) adapt and create model zoning and land use policy language for cities to customize and adopt, (4) Leverage state and local infrastructure funds and prioritize the co-location of services and safe transit corridors. (5) Ensure climate resilience by supporting allocation of existing climate funding for child-safe spaces such as Greening Schoolyards funding, and (6) adopt sustainable design standards for ECE facilities.

Team: Public agencies with regulatory authority including local jurisdictions and state enforcement departments. Support from community groups, elected officials, planners and transportation experts, labor organizations, child care support entities like resource & referral agencies and provider groups is also essential. Other relevant partner institutions for research and analysis would be beneficial (e.g., Northern Division of the California Fire Chiefs Association, San Francisco Planning and Urban Research (SPUR), American Planning Association - Northern California Chapter, UC Berkeley Center for Cities and Schools, UC Berkeley's Goldman School of Public Policy and College of Environmental Design to analyze existing zoning and permitting, as well as fire regulations, and recommend zoning and permitting reforms to enhance safety while easing ECE expansion). State Community Care Licensing can also be helpful here. This tactic requires all these entities and groups work together collaboratively, ensuring that permitting and fire code streamlining have the intended effect of increasing and preserving the supply of child care in the community.

Costs: This tactic will focus on developing policies and guidelines for adoption by respective agencies. Given the scope of this work, this tactic would benefit from hiring a technical consultant and a process facilitator. The cost of planning and analysis activities might range from $500,000 to $2 million over three years - depending on the final scope of the effort. Costs would be to draft model zoning language, coalition-building and public forums/webinars/communications to educate stakeholders on proposed reforms, administrative costs associated with zoning changes, and implementation and monitoring expenses. Costs to launch and expand innovative pilots could range from $1 to $10 million.

Potential metrics: (1) Number of jurisdictions that adopt model permit, fire and business license language such as by-right zoning or reduced permit timelines (2) Bay Area entities supporting relevant state legislation such as AB752 (3) Number of new and expanded ECE facilities that occur after zoning changes (4) ECE spaces preserved or expanded as a result of pilots (5) reduction in commute times (assessed by surveys, focus groups).

Task	Responsible Party	Timeline
C.2.1 **Evaluate land use, zoning, and fire code regulations affecting ECE facility development.** Include insights from permitting authorities and the ECE sector, such as family child care homes and ECE centers, to formulate recommendations. Status: *LIIF has conducted the scan in three counties, and other entities in two more. The results inform the Local Government ECE Guidebook.*	*Lead:* Sector Coordinator *Partner:* Regional Coordination Council, local, regional, and state permitting and regulatory agencies, the ECE sector, higher education research partners, and local community organizations.	Medium

• ***Recommendation:*** *Allocate funding for assessments in counties that have not yet conducted one.*		
C.2.2 **Develop model language and recommendations** for relevant local and regional agencies to align and streamline regulations, standards and processes across multiple jurisdictions. Develop a process for reviewing and updating them periodically. Consult with the state legislature to adopt supportive policies and procedures and advocate for relevant local and state reforms. Develop pre-approved or standard site plans for common settings, such as faith community sites, to reduce development time. Assess zoning and fee structures regionally, building on LIIF's county assessments. *Status: The Local Government ECE Guidebook, nearing completion, provides best practices for supporting child care through regulation and planning. It will continue as a living document.*	*Lead:* Sector Coordinator *Partner:* Regional Coordination Council, local, regional, state permitting and regulatory agencies, the ECE sector, higher education research partners, and local community organizations.	Short, then ongoing
C.2.3. **Support and expand legislation** and local efforts such as AB752 to specifically support co-location of ECE facilities with affordable housing and mixed-use developments. *Status: AB 752 was signed into law and took effect January 1, 2026.* ***Next step:*** *help cities align local codes (covered in the Local Government ECE Guidebook). AB 1914, which would have required general plans to address child care, did not pass in 2026. The state's General Plan Guidelines are being updated, and regional ECE partners will raise key issues for including child care.*	*Lead:* Sector Coordinator *Partner:* Various local community organizations and local jurisdictions	Ongoing
C.2.4 **Resilience design guidelines.** Develop design guidelines for child-safe and climate-resilient spaces, and disseminate guidance including toolkits for planners/developers and host networking events and convenings with ECE operators, developers, planners, architects and consultants on climate-friendly design and co-location. *Status: LIIF developed a guide for child care providers on best practices for outdoor surfaces. The Local Government ECE Guidebook includes a resilience design information.* • ***Recommendation:*** *Fund further projects that provide best practices in design.*	*Lead:* LIIF *Partners:* Local child care support organizations, Build Up for San Mateo County's Children, etc., local planning organizations and developers	Medium

C.2.5. **Pilot projects.** Launch and expand local pilots such as the East Contra Costa Healthy Homes Collaborative (ECCHHC), a "Safe Routes to ECE" Program, San Francisco's Family Child Care Facility Acquisition Project. *Status: LIIF continues to administer the San Francisco Family Child Care Home Purchase Fund.*	*Lead:* Sector Coordinator *Partners:* Pilot sponsors such at ECCHHC, San Francisco's Child care Facilities Fund, etc.	Medium
C.2.6. **Regulatory conflicts affecting existing supply.** Identify and help resolve regulatory conflicts that close or shrink existing child care, such as fire code requirements that make infant rooms unaffordable and ADA or building code requirements that conflict with licensing rules. Provide providers and local officials with clear guidance and workarounds. *Status: New in this revision. A 2025 study for LIIF, drawing on 597 provider survey responses, found that 2022 fire code changes requiring sprinkler and alarm upgrades for centers serving infants and toddlers cost some providers hundreds of thousands of dollars and delayed openings. The state paused implementation in 2024 pending revised standards.*	*LIIF, local building and fire officials, Community Care Licensing, R&Rs*	Short

Tactic C.3: Align supply building initiatives with housing, community development, and tax credit programs.

Purpose: The Bay Area, like most regions in California, has a chronic and severe lack of licensed ECE supply, especially for infants and toddlers. The physical infrastructure, including ample indoor and outdoor space, is a critical component of supply building to meet community needs. Aligning ECE supply building efforts with existing housing and community development will increase livability, decrease car trips and maximize resources for families.

Program design: This tactic can be based on existing pilots such as Oregon's CARE Fund and incentives (e.g. tax waivers or credits) to support co-located child care and housing projects, aligning timelines and resources across sectors to streamline partnerships between developers, landlords, and ECE providers.

Team: State and local government agencies administering housing/tax credit programs, CDFI(s) who typically manage funds and financing for housing and ECE, housing developers and ECE providers to partner on specific co-location projects, and policy advocates to drive legislative change.

Costs: The cost to develop gap financing could be $10 to $20 million to incentivize co-located developments through grants, loans and TA. Oregon's fund started at $10 million. Funding should include administrative costs to manage cross-sector programs, possible tax revenue

adjustments, and technical assistance for co-locating developers and providers. Tasks 3.1 through 3.3 would be closer to $500k - $750k combined.

Potential metrics: Number of co-located projects, amount of funding leveraged per ECE facility, policy adoption/change (number of incentives/tax policies to support ECE providers), and quantification of private-sector participation (number of landlords/developers using tax incentives for ECE spaces).

Task	Responsible Party	Timeline
C.3.1 **Facilities development resource directory.** Survey existing facilities to gather information about their architects, developers, project consultants, and ECE operators, and create a knowledge-sharing resource. *Status: LIIF maintains a list of experienced ECE architects, available on the Build Up California website.* • ***Recommendation:** Expand the list to include developers, project consultants, and ECE operators, and share it through the Local Government ECE Guidebook implementation work.*	*Lead:* Sector Coordinator *Partners:* Local child care support organizations, Build Up for San Mateo County's Children, etc., local planning organizations and developers	Short
C.3.2. **Gap financing program.** Research the feasibility of creating a pilot gap financing program, with secured funding and an intermediary to administer funds, possibly starting with one pilot location *Status: Not completed in this implementation period.* • ***Recommendation:** Allocate funding to support gap financing, with the product housed at a CDFI.*	*Lead:* Sector Coordinator *Partners:* Developer, local jurisdiction for pilot, CDFI or other financing intermediary	Medium
C.3.3. **ECE partnerships with developers.** Facilitate developer-provider partnerships, through forums and other communications that connect housing developers and ECE providers with each other, and with TA on best practices for co-location models. *Status: Not completed in this implementation period.* *Recommendation: Pair with outreach to cities and a gap financing product.*	*Lead:* Sector Coordinator *Partners:* Local child care support organizations, Build Up for San Mateo County's Children, etc., local planning organizations and developers	Medium
C.3.4 **Pilot gap financing fund.** Launch a pilot gap financing fund that offers funding as part of the capital needed to build out the child care space within a housing development. Depending on availability, financing could cover up to 20% of project costs and could be used to build out the child care space or other financing needs to ensure a project is viable.	*Lead:* Funding Intermediary *Partner:* Developer, local jurisdiction	Long

Status: Beyond the scope of this implementation period.		
C.3.5. **Child care as an eligible use.** Advocate for state and regional grant programs that fund community-serving facilities and programs, to explicitly list child care as an eligible use, so applicants do not have to make the case program by program. *Status: New in this revision*	*Regional ECE partners, LIIF, CDSS*	Ongoing

Tactic C.4: Encourage the use of existing publicly owned assets to build ECE supply.

Purpose: The Bay Area, like most regions in California, has a chronic and severe lack of licensed ECE supply, especially for infants and toddlers. The physical infrastructure, including ample indoor and outdoor space, is a critical component of supply building to meet community needs. Increasing ECE supply by repurposing underutilized public assets (buildings, land, parks) to create affordable spaces for child care programs, reducing barriers to expansion for high-quality providers is a promising strategy. The County of Los Angeles has created an inventory of County-owned property suitable for ECE. Many other jurisdictions like BART have assessed their publicly-owned property to identify space to develop housing.

Program design: (1) Advocate for local jurisdictions to inventory publicly owned land to identify suitable public assets, (2) Develop a framework for transferring assets (donation, affordable lease) to qualified providers and (3) Advocate for development of a publicly-owned ECE program and (4) Work with jurisdictions to develop and adopt best practices for identifying and adapting underutilized and/or vacant public land to build ECE supply.

Team: County, city and regional asset managers, city planning departments, state housing/community development agencies, ECE providers, support organizations and advocates, non-profit real estate partners.

Costs: Costs for Tasks 4.1 and 4.2 are roughly estimated at $750k - $1 million combined. Costs to improve, modify or purchase available land and account for potential revenue loss from below-market transfers would be provided through the facilities fund in Tactic C.1. A technical consultant may be helpful here.

Potential metrics: Number of properties identified and successfully transferred/utilized, quantification of space designated to ECEs, number of new ECE slots created, cost savings to providers from affordable access to space, assessment of timelines of the process.

Task	Responsible Party	Timeline
C.4.1 **Asset inventory.** Conduct regional public asset inventory in key jurisdictions and assess existing initiatives, including their criteria *Status: The Local Government ECE Guidebook encourages cities to inventory publicly owned properties and assess their suitability for child care.* • ***Recommendation:*** *Beyond the Guidebook, this effort should be led by cities and could be supported by a funded technical assistance provider.*	*Lead:* Consultant (or Sector Coordinator) *Partners:* Local jurisdictions, local planning organizations and developers	Medium
C.4.2 **Asset transfers.** Develop a framework for transferring assets (donation, affordable lease) to qualified providers. *Status: Not completed in this implementation period.*	*Lead:* Consultant (or Sector Coordinator) *Partners:* Local jurisdictions, local planning organizations and developers	Medium
C.4.4 **Public lands.** Work with jurisdictions to develop and adopt regional best practices for identifying and adapting underutilized and/or vacant public land to build ECE supply. Work to remove any barriers to utilizing the California Surplus Land Act (SLA) for child care. *Status: The Local Government ECE Guidebook encourages cities to inventory publicly owned properties and assess their suitability for child care.* • ***Recommendation:*** *Beyond the Guidebook, this effort provide funded technical assistance to help public agencies with surplus land navigate barrier removal in their jurisdiction.*	*Lead:* Consultant (or Sector Coordinator) *Partners:* Local jurisdictions, local planning organizations and developers	Medium
C.4.4 **Launch pilot projects**. Launch pilot projects with several high-potential sites, assess and document lessons learned to inform wide-scale rollout across all regions. *Status: See Catalyst Grant results.*	*Catalyst Grantee*	Long

Strategy D: PROCESS AND STRUCTURE.
Create and provide backbone support to an inclusive and effective Bay Area ECE Sector Investment Implementation Process.

Tactic D.1: Engage the ECE Sector and Stakeholders in refining and implementing the ECE Activation Plan.

Purpose: Establishing a regional partnership represents a critical imperative for the Bay Area's ECE sector which has historically operated in a county-by-county bubble. While there are regional groups where the ECE sector exchanges information, there is no place where all the various agencies, departments, and programs move from sharing county-scale models to collaborating on a shared regional approach with shared regional resources. These tasks will create a structure to coordinate this effort at the regional scale. Given the region's geographic scope and diversity, a specialized entity focused on improving and expanding the ECE sector both, as an employment sector and as an anchor institution for other families would develop shared research and resources, build the political influence to secure regional, state, and federal investment, help counties adopt each other's successful models, and sustain partnerships within and beyond the ECE sector. Stakeholders cautioned that regional work must add value to county efforts, not compete with them, and must be paired with statewide advocacy for sustainable public funding.

Program design: Planning, coordination, backbone support

Team: A nine-county ECE steering committee, supported by a host organization and staff to be identified. Sixteen Bay Area ECE stakeholders volunteered in August and September 2026 to continue this work, including resource and referral agencies, Local Planning Councils, county offices of education, First 5s, community colleges, apprenticeship sponsors, and two BAJFC Steering Committee members.

Costs: The annual operating cost for the Advisory Committee to turn into a more formal entity now that the Catalyst and Sector Coordinator contracts have concluded could range from $250,000 to $2 million depending on what the entities scope. Potential fund sources may include philanthropy, federal or state grants, and state budget appropriations. No specific funding source has been identified at this point. Ideally regional advocacy coordination could happen through the Advisory Committee; however, lobbyist or policy consultation support might require additional funds $100-300K depending on the scope of their efforts. It is possible that counties could pool their existing lobbing resources to seed some of these costs.

Potential metrics: Geographic and sector diversity of stakeholders engaged, Funding secured, Organizational structure established and operating, first issue-specific regional effort launched with participation from at least five counties

Task	Responsible Party	Timeline
D.1.1. **Prioritize tasks.** Work with a nine-county ECE steering committee to prioritize tasks in this Plan, starting from the three priorities stakeholders identified in August 2026: a regional needs assessment, a Bay Area policy platform on state funding, and rollout of the Local Government ECE Guidebook. *Status: Priorities identified at the August 28, 2026 working meeting and presented to the BAJFC Steering Committee on September 25, 2026.*	Sector Coordinator, BAJFC Steering Committee	Short, then ongoing
D.1.3. **Nine-county ECE steering committee.** Work with ECE stakeholders to establish a nine-county ECE steering committee and identify a host. Weigh strengthening an existing body against creating a new entity, such as a nonprofit or joint powers authority. Test regional collaboration through a single issue-specific effort, with the regional needs assessment as the leading candidate, before forming a comprehensive body. • Develop a roster and charter, identify roles and responsibilities, and define the scope of its work. • Seek buy-in from key stakeholders and partners. Finalize the partnership proposal. Define the decision-making process and operating guidelines. • Seek funding to operationalize the partnership for a minimum of five years. Develop a staffing plan. • Recruit members and get commitment letters from member organizations. Set meeting cadence • Identify a host organization and facilitator • Hold the kick-off meeting. Adopt operating guidelines and a year-one work plan. • Consider creating sub-sector based tables or topic-specific working groups. *Status: The Sector Investment Coordinator team pursued a shared nine-county advisory committee with the High Road to ECE Consortium Catalyst project, but it did not fit the project's scope, and Catalyst projects concluded in September 2026. We have a group of stakeholders committed to continuing the work.*	ECE stakeholders across the nine counties, BAJFC Steering Committee members	Medium
D.1.2. **Raise money.** Work as a region to raise funds for plan implementation through grant application and partnership creation in the philanthropic, regional, state, federal government, and business sectors.	Sector Coordinator, BAJFC Steering Committee	Ongoing

Status: Early interest from philanthropy and from county ECE agencies, including pooled contributions. No funding secured. The team supported Round 2 Regional Investment Initiative proposal development with partner teams seeking to include child care.		
D.1.3. **Regional advocacy coordination.** Create a regional approach to state-level advocacy on ECE legislation, rules, programs, and budget allocations to have a stronger united voice. Develop a Bay Area unified policy platform on state funding. Identify which actions are best done by county, by region, or only statewide, and pair regional coordination with statewide advocacy rather than substituting for it. *Status: Presented to the Bay Area Caucus of state legislators (January 2026). With separate funding, LIIF sponsored AB 752 (enacted) and AB 1914 (did not pass), and the team provided technical input.*	Sector Coordinator, ECE Advisory Committee	Ongoing
D.1.4. **Build on Catalyst project outcomes.** Carry forward products of the ECE-related Catalyst projects into regional work, such as the San Mateo resource and referral website, the family navigation best practices report, and the career pathways inventory. *Status: The team provided technical support to the ECE-related Catalyst project through their conclusion in September 2026.*	Sector Coordinator, Catalyst projects.	Short
D.1.5. **Partnerships.** Explore new public, private, institutional, and non-profit partnerships to sustain and improve the ECE sector. This includes cross-sector partners (Workforce Development Boards, city planners, economic development, housing, and employers) and ECE efforts in other California Jobs First regions. *Status: Surveyed and convened Bay Area Workforce Development Boards, including the State WDB, and published a WDB and ECE brief. Held an employer solutions convening with Build the Future (Santa Clara County). Joined the statewide California Jobs First ECE cohort and exchanged lessons with the Uplift Child Care Coalition (Central Coast).*	Sector Coordinator, BAJFC Steering Committee, ECE Advisory Committee	Ongoing
D.1.6. **Stakeholder engagement plan.** Identify the key objectives of stakeholder engagement and create a stakeholder engagement plan for the next phase of regional work. *Status: Completed for the 2025 to 2026 implementation period.*	Sector Coordinator, BAJFC Steering Committee	Short

D.1.7. **Stakeholder engagement events.** Plan and execute up to four stakeholder engagement events that target the following specific groups of ECE stakeholders: ● Center and family child care providers ● Workforce education and professional development ● ECE agencies (counties, First5s, Head Starts, Resource and Referral agencies). ● ECE families ● Family, and Neighbor (FFN) providers ● Child Care Providers United and California Federation of Teachers We will ensure that engagement events are planned to be accessible and inclusive of participants from across the Bay Area's different counties, place types (urban, suburban, and rural), racial/ethnic groups, educational approaches and types, among other dimensions of diverse representation. *Status: Completed: Plan launch webinar (September 2025); individual county briefings ECE cohorts in all nine counties. Bay Area WDB Roundtable (May 2026) work environments convening (Hayward, August 2026); "Going Younger" webinar series (fall 2026); employer solutions convening and webinar; and the "What's Next?" working meeting with participants from all nine counties (August 28, 2026). This is in addition to numerous BAJFC ECE presentations at other ECE tables, conferences, webinars, etc. and countless individual conversations strategizing on how to move regional action forward.*	Sector Coordinator, BAJFC Steering Committee, All Home, SF OWED	Ongoing

A PATH FORWARD

Building a Resilient and Equitable Early Care and Education System for the Bay Area

The path forward outlined in the Bay Area Jobs First Collaborative Early Care and Education (ECE) Activation Plan involves a coordinated, multi-year effort to transform the ECE sector into an equitable, accessible, and sustainable public good across the nine-county Bay Area. The Plan is structured around four core strategies: Workforce, Access, Infrastructure, and Process and Structure. Each is supported by specific tactics aimed at raising wages and benefits for ECE workers, expanding access for underserved families, improving physical infrastructure, and strengthening governance and coordination. These strategies are interdependent and require substantial public and private investment, regional coordination, and policy reform. The ultimate goal is to create a resilient, high-quality ECE system that supports ECE workers, families, and regional economic growth.

Key Next Step: Building the Regional Table

During the 2025 to 2026 implementation period, the Sector Investment Coordinator team carried out research, convenings, and tools that moved several tactics forward. The team also tested whether the region wants to invest in regional ECE coordination going forward. Stakeholders gave a clear but qualified yes, and identified where to start:

- Establish a nine-county ECE steering committee and identify an organizational home and sustained funding.
- Launch the regional needs assessment as the first joint project, beginning with a nine-county scoping study.
- Coordinate state policy advocacy through a Bay Area unified policy platform on state ECE funding.
- Share innovation across counties, so counties without dedicated ECE funding can buy into tools and programs built by counties with measures.
- Roll out the ECE Guidebook for Local Government to counties and cities.

Sixteen Bay Area ECE stakeholders, including two BAJFC Steering Committee members, have volunteered to support this next phase.

A Living Document

The activation plans are meant to be living documents that are updated and refined over time. This Version 2 represents the policy and implementation framework for the Early Care and Education (ECE) sector in the Bay Area as of September 30, 2026. Going forward, the regional ECE steering committee can refine and update the Plan as priorities, funding, and partnerships evolve.

ACRONYMS

Acronym	Full Name
APP	Alternative Payment Program
BAGJPE	Bay Area Good Jobs Partnership for Equity
BAJFC	Bay Area Jobs First Collaborative
CCPU	Child Care Providers United
CCRC	Child Care Resource Center
CDFI	Community Development Financial Institution
CDSS	California Department of Social Services
CEL	Centralized Eligibility List
CERF	Community Economic Resilience Fund
CSCCE	Center for the Study of Child Care Employment
CTE	Career and Technical Education

Acronym	Full Name
ECCHHC	East Contra Costa Healthy Homes Collaborative
ECE	Early Care and Education
FCC	Family Child Care
FFN	Family, Friend, and Neighbor (caregivers)
GO-Biz	Governor's Office of Business and Economic Development
LIIF	Low Income Investment Fund
LPC	Local Planning Council
LWDA	Labor and Workforce Development Agency
R&R	Resource and Referral (Agencies)
ROP	Regional Occupational Program
SEIU	Service Employees International Union