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Early Care and Education Needs Assessment - 2025

PREPARED FOR

CONSORTIUM FOR EARLY LEARNING SERVICES

"Positively Impacting the Lives of Children"

Riverside Local Child Care and Development Planning Council

PREPARED BY:

Brion Economics INC.

Table of Contents ....Page

List of Tables and Exhibits

Tables

Exhibits

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Riverside County Local Planning Council Members

The following members currently serve as voting members on the Local Planning Council in Riverside County. This section acknowledges their support of ECE planning efforts in the County by serving on the LPC. Those with an asterisk (*) by their names served on the Needs Assessment Planning Committee for this effort and provided direction in its preparation. Their time and expertise are greatly appreciated.

LPC VOTING MEMBERS ROSTER

Name	LPC Member Category	Organization
Davina Bailey, Ed.D., Executive Director LPC Chair*	Child Care Provider	UCR Center for ECE
Andrea Del Valle*	Consumer	Consultant
Charity Douglas, MSSW, Director*	Public Agency Representative	DPSS
Celeste Etheridge, FCC Provider	Child Care Provider	We Kare Daycare LLC
Shannon Gonzalez, MPA, Chief Operating Officer	Discretionary Appointee	Family Service Association
Tammi Graham, Executive Director	Public Agency Representative	First 5 Riverside County
Mary Hampton, Quality Assurance Coordinator*	Discretionary Appointee	Family Service Association
Jill Johnson, Administrator, ECE/EES*	Public Agency Representative	Riverside County Office of Education
Heidi Maldoon, Executive Director	Community Representative	Variety Children's Charity of the Desert
Noemi Maloy, FCC Provider*	Community Representative	LaRed Network of Child Care FCCH Providers
Talia McCarthy	Consumer	Parent
Dominic Morales, Regional Sales Representative	Community Representative	Lakeshore Learning
Candice Morgan	Consumer	Parent
Trudy Oliver, Administration Director*	Child Care Provider	Temple Beth El Child Development Center
Consuelo Painia-Victor, FCC Provider	Child Care Provider	Victor Family Child Care
Ami Paradise, Director of Early Childhood Education*	Public Agency Representative	Temecula Valley Unified School District
Emily Phommalysack, Program Assistant, Program Compliance RCOE*	Consumer	Parent
Pam Robinson, Executive Director	Discretionary Appointee	Concilio Child Development Center
Kristin Symonds, Development Supervisor	Community Representative	Early Explorers

Study Preparation and Funding

The Consortium of Early Learning Services (CELS) retained Brion Economics, Inc. to prepare this study. See www.brionecon.com for more information.

This study was funded by the Universal PreKindergarten Mixed Delivery Planning Grant from the California Department of Education for utilization by the Local Planning Council (LPC) of Riverside County (through CELS), and the Riverside County Local Planning Council for use in its strategic planning efforts.

I. Introduction, Background, Approach, and Organization

I.1 Introduction

This study provides an update of the *Early Care and Education (ECE) Needs Assessment*, which is mandated by the State Department of Social Services (DSS) to be updated every five years. A separate study prepared simultaneously includes an update of the *ECE Strategic Plan – 2025 to 2030*, which is also currently required to be updated every five years, and is provided under separate cover. The Local Child Care Planning Council (LPC) focuses on improving the outcomes for children through meaningful early experiences. Brion Economics, Inc. (BEI) has been retained by CELS to prepare the *ECE Needs Assessment* for use by the LPC and other ECE agencies and organizations in the County. This study is being funded by the State UPK Mixed Delivery Grant and the LPC and provides data and analysis that will support the UPK planning process in Riverside County.

Embracing the collective efforts of local stakeholders—including families, educators, businesses, and policymakers—this study provides data, analysis, and projections designed to inspire action and drive systemic change. Together, the broader Riverside County community can ensure that every child has access to quality early care and education, building the foundation for lifelong success through enriching early experiences.

About the Riverside County Local Planning Council

The Riverside County Local Child Care Planning Council (LPC) plays a central role in the efforts to support and advance the well-being of children and families in the County. Established in compliance with California legislative mandates, it serves as the official forum for identifying ECE priorities and shaping policies to address them. This role, authorized by the California Department of Social Services (EC Section 8499.3), fulfills the Legislature's vision of unified and integrated services for children and families by linking new initiatives with existing strategies and collaborations (EC Section 54744).

The LPC collaborates with the Riverside County Office of Education, First 5 Riverside County, and other entities to carry out Early Care and Education staff retention initiatives. The LPC membership is comprised of 20% from each of the following categories:

1. **Consumers:** Defined as a parent or person who receives, or have received, within the past 36 months, child care services.

2. **Child Care Providers:** Defined as a person who provides child care services or represents persons who provide child care services.

3. **Public Agencies:** Defined as a person who represents a city, county, city and county, or local education agencies.

4. **Community:** Defined as a person who represents an agency or business that provides private funding for child care services or who advocates for child care services through participation in civic or community-based organizations but is not a child care provider and does not represent an agency that contracts with the California Department of Social Services (DSS) to provide child care and development services.

5. **Discretionary:** Shall be appointed at the discretion of the appointing agencies. The County Board of Supervisors (CBS) and the County Superintendent of Schools (CSS) are each to appoint one half of the LPC members. In the case of uneven members, both appointing entities will agree on the odd-numbered appointee.

I.2 Background and Approach

In California, there are several methodologies for estimating demand for ECE or child care, but there is limited published data on this issue. BEI has followed the *California Local Child Care Planning Council Needs Assessment Template*[1] using suggested data sources, except where more current and local data or additional data were available. BEI suggests that local jurisdictions consider local population data and conditions and develop demand factors that reflect conditions in their county. This study's Needs Assessment provides a more comprehensive assessment of the need for ECE and the issues impacting children and families than the template requires. In particular, the study focused on children ages 0 to 12 years old, whereas the LPC template only requires data on children 0 to 5 years old. Accordingly, the analysis of the supply and demand for ECE is divided into three age groups: Infants/Toddlers, Preschool, and School Age. Additional consideration is given to 4-year-olds who may be attending Transitional Kindergarten, which is discussed below.

In addition to the *ECE Needs Assessment* template topics, this study includes a detailed supply and demand analysis of ECE services countywide, by four regions, and by zip code. For this purpose, the need for ECE is estimated by starting with estimates of children with working parents, based on available census and local projection data, and then using additional demand factors to adjust that demand based on reviews of other Needs Assessments and parent surveys.[2]

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[1] See https://www.cdss.ca.gov/Portals/9/CCDD/LPC-Needs-Assessment.pdf, as viewed May 19, 2025.
[2] Most data required for the Needs Assessment template, however, is at the County level as discussed in **Chapter IV**.

Table I-1 summarizes the cities and communities that comprise each of the four regions used in this study. More detailed data is provided by zip codes in **Appendix A**.

Table I-1
Regional Area Definitions
Riverside County Needs Assessment - 2025

Cities and Communities by Region
Western Region (BOS Districts 1 and 2):
Serves Riverside, Perris, Corona, Norco, Eastvale, Jurupa Valley and surrounding unincorporated communities (Good Hope, Highgrove, March Air Reserve Base, Mead Valley, Woodcrest, Coronita, El Cerrito, El Soberante, Home Gardens, and Lake Mathews.)
Southwestern Region (BOS District 2 and 3):
Serves Canyon Lake, Lake Elsinore, Menifee, Temecula, Murrieta, Wildomar and surrounding unincorporated communities (Aguanga, Anza Valley, East Hemet, French Valley, Green Acres, Homeland, Romoland, Lake Riverside, Sage, Winchester, DeLuz, LaCresta, Tenaja, as well as parts of Valle Vista, Meadowbrook, Lakeland Village, Temescal Valley, and Warm Springs.)
Eastern Region (BOS District 4):
Entire desert region, extending from Palm Springs to Blythe, including cities, Blythe, Cathedral City, Coachella, Desert Hot Springs, Indian Wells, Indio, La Quinta, Palm Desert, Palm Springs, Rancho Mirage and surrounding unincorporated communities (Bermuda Dunes, Chiriaco Summit, Colorado River Communities, Desert Center, Desert Edge, Eagle Mountain, Idyllwild, Indio Hills, Lake Tamarisk, Mecca, Mesa Verde, Mountain Center, North Shore, Oasis, Pine Cove, Ripley, Sky Valley, Sun City, Thermal, Thousand Palms and Vista Santa Rosa.)
Mid Region: (BOS District 5)
Serves Moreno Valley, Banning, Beaumont, Calimesa, Hemet, San Jacinto and surrounding unincorporated communities (Cabazon, Cherry Valley, Lakeview, Nuevo, Reche Canyon, San Timoteo Canyon, as well as parts of Valle Vista and White Water.)

Sources:
https://consortiumels.org/regions/
Brion Economics, Inc.

Understanding the ECE Field

In California statute and professional practice, the term Early Care and Education (ECE) is the standard nomenclature used in place of “child care” or “early learning and care.” The use of ECE emphasizes that education and development begin at birth, occurring within the context of nurturing care. High-quality ECE supports children's growth across all developmental domains and occurs in both formal settings (licensed centers and Family Child Care Homes) and informal settings (such as license-exempt family, friend, and neighbor care).

For this study, the term "Early Care and Education" is used as the standard nomenclature, consistent with California statute and professional practice. ECE is defined here to encompass what is commonly called child care,[3] early learning and care (ELC), and programs offered through local school districts, including Transitional Kindergarten (TK),[4] Universal Pre-Kindergarten (UPK), and before- and after-school programs offered by private providers and local school districts.[5] The ECE industry encompasses a wide range of workers, including caregivers, family, friends, and neighbors (FFNs), teachers, assistants, educators, administrators, and owners and directors of ECE programs, including Family Child Care providers (FCCs). ECE programs can be run by community non-profits, school districts, charter schools, faith-based organizations, and privately or publicly funded programs. Some ECE programs are subsidized by the State and federal governments, such as State Preschool, migrant programs, Head Start, etc.[6] In sum, the ECE industry represents a complex and diverse system of individuals and organizations in both private and public settings, all with a focus on caring for and educating children ages 0 to 12 years old.

In Early Care and Education, age groups are often distinguished to reflect different developmental stages and program requirements. For this Needs Assessment, three different age groups are used, defined as follows:

- **Infants/Toddlers (ages 0 up to 30 months):** During this stage, children undergo the fastest and most significant development. Infants and toddlers are highly vulnerable and require full attention, which means lower adult-to-child ratios make Infant/Toddler care costlier compared to other age groups.

- **Preschool (ages 31 months to 4 years old):** Mental, physical, and social skills learned by age 4 shape a child's entire life. Children in this group are already more independent than infants and toddlers, resulting in higher teacher-to-child ratios. Preschool often includes 4- and 5-year-olds who do not attend public school for TK or Kindergarten.

- **School Age (ages 5 to 12 years old):** ECE for school-aged children includes supervised, structured activities at school and community locations, before and after school hours, summer breaks, and long holidays. Since the introduction of public Transitional Kindergarten (TK) for 4-year-olds, before- and after-school care, also called wrap-around care, is also needed for this age group (see more details on TK below).

[3] For studies and articles that use the term child care, we have kept that reference for consistency with the cited source, which may not use early care and education.
[4] TK is relatively new in the ECE landscape and offers free ECE to 4-year-olds throughout the State. The program should be fully implemented by FY 2025-2026. However, not all 4-year-olds are participating in TK, and TK does not offer full-time (i.e., 9 hours per day) care.
[5] For this study, School Age care is focused on before- and after-school care and does not include a discussion of public school attendance for children between the ages of 5 to 12.
[6] For a specific list of all subsidies received by ECE programs in Riverside County, see Table IV-5.

ECE is provided by a diverse field of actors, consisting of two major groups: licensed and license-exempt center providers.

- **Licensed providers** operate within a complex framework of standards and regulations, managed and enforced by the Community Care Licensing Division of the California Department of Social Services, which oversees the State's licensing system. Licensed providers may receive subsidies to serve lower-income children and may offer a mixture of unsubsidized and subsidized spaces.
    - Licensed care includes **Family Child Care (FCC) providers**, who are permitted by law to operate in any residence throughout California. There are two FCC sizes: small, accommodating up to eight children, and large, serving up to fourteen children. Both small and large FCC providers create an environment with a limited number of children grouped by age, fostering a "home-like" atmosphere that many parents find appealing. Typically, these providers cater to children from birth to five years, though many also care for school-aged children.
    - **ECE Centers** typically operate out of dedicated buildings or spaces and offer a range of services, such as infant care, toddler care, preschool, and before- and after-school programs. Typical classroom sizes range from 6-12 children for infants and toddlers and up to 20 or more for preschool-age children. A typical preschool classroom serves 24 children.
- **License-exempt care** includes certain public recreation programs and school-based ECE programs, provided by local school districts or private providers contracting with local school districts.
- **Unlicensed care** for this analysis includes arrangements with private nannies, relatives, and "family, friends, and neighbors" (FFN) caregivers. FFN care refers to unregulated child care arrangements where a family member, friend, or neighbor provides care for children from one family other than their own in their home or the child's home. Some parents prefer FFNs for their flexibility, affordability, and cultural alignment, particularly for accommodating non-traditional work hours and maintaining low adult-to-child ratios.

Transitional Kindergarten (TK) and Universal Pre-Kindergarten (UPK)

California's *2010 Kindergarten Readiness Act* changed the kindergarten entry date from December 2nd to September 1st so that most children are age five when they start kindergarten. The law also established Transitional Kindergarten (TK), an additional year of kindergarten available to four-year-olds with birthdays between September and December. TK is part of the State's public education system and is a free program for all eligible children, regardless of income. It is operated by public school districts and charter schools, with classes taking place at neighborhood elementary schools. In 2021, Governor Gavin Newsom signed Assembly Bill (AB) 130, which gradually expands TK over a four-year period, between the 2022-23 and 2025-26 school years, until all four-year-olds in California are eligible to enroll. Like kindergarten, TK is voluntary, and parents have the choice to enroll their children in TK, another ECE program, or to care for their children themselves. However, many families are expected to enroll in this free, public school-based program.

Universal Pre-Kindergarten (UPK) is a transformative initiative, introduced in the California *Master Plan for Early Learning and Care,*[7] to ensure equitable access to high-quality ECE for every four-year-old, all three-year-olds in income-eligible families, and children with disabilities.[8] Building upon the foundation established by the *Kindergarten Readiness Act* of 2010, UPK extends TK delivered by public schools to make it universally accessible to all four-year-olds by the 2025-26 school year. Additionally, California has increased funding for the California State Preschool Program (CSPP) and allowed new eligibility for children with disabilities, children above the family income eligibility limit, and younger children. This ambitious statewide effort seeks to bridge the gap between preschool and kindergarten.

The availability and expansion of TK to all four-year-old children by FY 2025-2026 is affecting fee-based and publicly subsidized preschool providers. As eligibility expands and TK is offered at more school sites, more families enroll their four-year-olds in TK rather than other types of preschool. However, families weigh TK's no-cost option against CSPP, Head Start, or private preschool options based on hours, calendar, and availability of wrap-around care. While TK is free, it operates on a school calendar and during school hours – both of which are shorter than the typical preschool program. As eligibility for CSPP has been increased, eligible families, and families with the resources to pay for preschool, may choose not to enroll in TK. Additionally, preschool programs may enroll additional three-year-old children due to the expanded eligibility criteria. In general, UPK is intended as a mixed-delivery system, with CSPP, Head Start, FCCs, and private providers continuing to play essential roles next to TK.

I.3 Study Methodology

For this effort, the BEI team has gathered the following information and data and reviewed existing ECE studies:

- **Existing Studies**:
  - The completed Needs Assessment template (July 2022);
  - Riverside County Child Care Needs Assessment and Strategic Plan 2015 to 2020;
  - Matrix of updated Strategic Plan Goals for 2021 to 2025; and

[7] See https://californiaforallkids.chhs.ca.gov/assets/pdfs/Master%20Plan%20for%20Early%20Learning%20and%20Care%20-%20Making%20California%20For%20All%20Kids%20(English).pdf
[8] California Department of Health and Human Services, Master Plan for Early Learning and Care (2020). https://californiaforallkids.chhs.ca.gov/assets/pdfs/Master Plan for Early Learning and Care - Making California For All Kids (English).pdf

  - The Zip Code Priorities for Fiscal Years 2023-2024 and 2024-2025.

- **ECE Supply Data**:
  - Number of ECE spaces or capacity by age group and provider and provider type, i.e., center-based providers, Family Child Care providers (FCCs), license-exempt center-based providers, and Family, Friends, and Neighbors (FFNs) serving children ages 0 to 12 in the County; and
  - Available estimates of subsidized spaces by type of subsidized program and provider.

- **ECE Demand Estimates:**
  - ECE demand estimates for 2025 and 2030 were prepared by combining a variety of data sources.
    - The Early Learning Needs Assessment Tool (ELNAT), prepared by the American Institutes for Research (AIR)[9] provides pre-COVID data for 2020 regarding the number of children by age group and zip code, crucial for estimating children in each zip code and aggregating this data into four regions.
    - The Southern California Association of Governments (SCAG) offers overall population, household, and employment projections by jurisdiction in 5-year intervals, thus providing a local source for regional growth projections.
    - The P2B Report of the California Department of Finance (DOF) delivers county-level population projections by age, helping to forecast changes in age group percentages from 2025 to 2030.[10]
    - By combining these sources, population estimates by zip code and by age groups as defined for this study were prepared for 2025 and 2030. These estimates both reflect different growth projections for the various cities in the County, as well as overall demographic changes that affect the age distribution of the population. Zip code level data was then aggregated by four regions, facilitating a regional comparison of ECE supply and demand.[11]
    - Based on these population estimates, Labor Force Participation Rates (LFPRs) were then used to determine the number of children with working parents. The US Census American Community Survey provides LFPRs by zip code and age of children. Demand for ECE was further adjusted by

[9] https://elneedsassessment.org/
[10] This data is used to characterize the overall population trends in the County, including the number of children by age.
[11] The DOF and SCAG forecasts of total population are slightly different but similar; the resulting sum of children by age group estimated for this effort by zip code and region is slightly different that the total DOF estimates from the P2B forecast.

applying a demand factor varying by age group. These demand factors were determined based on a review of recent Needs Assessments and parent surveys conducted in California by BEI.

Transitional Kindergarten (TK) Data:

- All currently available data on children in TK by school district and providers of before- and after-school care for TK students, according to data from the California Department of Education's DataQuest service.

Additional data was collected for the Needs Assessment Template (see Appendix E), including:

- Waitlists and requests for non-traditional hours;
- Local language data;
- Children with IEPs or IFSPs;
- Migrant children;
- Providers participating in Quality Counts program;
- Household and family income;
- Labor Force Participation Rates of parents with children;
- Race and ethnicity;
- Poverty rates for families with children.

The Needs Assessment also addresses access, affordability, and facilities needs within Riverside County, as required by the Template.

In addition, Brion Economics, Inc. (BEI) conducted a supplemental online survey of ECE providers, staff, public agency representatives, and other stakeholders to provide local context and updated insights. The survey was administered from May 27 to June 22, 2025, in English and Spanish, with multiple reminders sent to encourage participation. Survey findings are included in Chapter III, with full results and the instrument in **Appendices C and D**. These survey results should be considered supplemental local input and not a substitute for state-required data sources.

I.4 ECE Benefits and Challenges

This section summarizes highlights of the current literature and research concerning both the benefits and challenges facing Early Care and Education. This information sets the stage for understanding the specific benefits of supporting ECE in Riverside County and the conditions challenging the workforce and providers. Additional recommendations and possible solutions specific to Riverside County are further discussed in **Chapter V**.

Benefits of Early Care and Education

Investing in children at an early age generates lifelong benefits for both children and society. Experts agree that high-quality early learning and child care yield significant annual rates of return along with long-term societal rewards and benefits for children. Frequent and enriching experiences for children help them with their personal success and future roles within the community as engaged residents, employees, and parents.[12] Children who have experienced high-quality ECE are more likely to have increased behavioral and academic readiness, which can lead to greater success in grades K-12, including higher test scores and graduation rates. Research indicates that participation in quality early childhood programs can bridge nearly half of the achievement gap between different demographic groups. Public investment in high-quality early childhood programs yields an income return of about $9,200 to $30,900 over a child's career, surpassing the initial costs of the program. Additionally, investments in ECE have been linked to reductions in involvement with the criminal justice system and decreased need for remedial education, resulting in substantial cost savings for society.[13] According to the work of James Heckman, Nobel Laureate, and many other economists, investing in high-quality ECE programs for disadvantaged children can deliver a 13% annual return on investment,[14] improving personal and social gains.[15] The longer we wait to intervene in the life cycle of the child, the more costly it is to remediate.[16] Although there is extensive information substantiating the value of investing in ECE, public policy has yet to align with the science and economics of investing in ECE.

In addition to the direct benefits for children's development and well-being, ECE supports families and children, keeps parents working, and drives local economies. For working parents, access to affordable and high-quality ECE is essential for maintaining employment and economic stability. Workers' productivity is decreased when they have to worry about their children's safety and well-being. A nationwide survey in 2022 found that 53% of working parents with children under three were distracted at work, reducing productivity. In the worst case, this can lead to being reprimanded (30% of respondents) or being let go (23%). Parents frequently turn down job opportunities

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[12] Temple, J. A., & Reynolds, A. J. (2007): Benefits and Costs of Investments in Preschool Education: Evidence From the Child–Parent Centers and Related Programs. Economics of Education Review, 26(1), 126-144.
[13] Executive Office of the President of the United States (2014*): The Economics of Early Childhood Investments*. https://obamawhitehouse.archives.gov/sites/default/files/docs/the_economics_of_early_childhood_investments.pdf, accessed March 8, 2024.
[14] Return on investment is a metric that investors often use to evaluate the profitability of an investment or to compare returns across a number of investments. In this reference, investment refers to payments made by the public and private sector investing in ECE.
[15] Heckman, J. (2014): *Invest in Early Childhood Development: Reduce Deficits, Strengthen the Economy*. https://heckmanequation.org/
[16] Upstream Team (2010): *Upstream Investments to Reduce Long-Range Demand for County Criminal Justice Strategic Plan Project #27.* Report to the Board of Supervisors, Sonoma County. January 11, 2010, p. 38.

(41%), promotions (28%), or further education (36%) due to the lack of ECE. Another 44% stated that they reduced their work hours because of child care responsibilities.[17] Further, studies have found an additional wage gap between mothers and childless women beyond the gender pay gap. Providing public funding for ECE can help close this gap. Every 10% increase in the number of children under age three in publicly funded ECE leads to a 1% decrease in the wage gap for mothers with children. This translates to significant pay increases for families and a reduction in child poverty.[18]

By providing a safe and nurturing environment for children, ECE programs enable parents to focus on their professional responsibilities, resulting in improved productivity and job retention. Accessible and affordable ECE can also reduce absenteeism and turnover rates among employees. Studies estimate that lack of access to adequate child care results in billions of dollars in business costs and losses annually.[19] Investments in ECE, in turn, contribute to business efficiency and profitability. Research shows that providing ECE decreased employee absences by 20% to 30% and reduced employee turnover by 37% to 60%.[20] A recent study of five companies with employee child care benefits, including well-known brands such as UPS and Etsy, showed a return on investment for these companies ranging from 90% up to 425%. These numbers are the combined result of better recruitment, increased retention rates, increases in productivity and presence, increased rates of job satisfaction, and positive impacts on career progression.[21]

The child care sector plays a vital role in the U.S. economy, contributing significantly to the gross domestic product (GDP) and employment. In California, the sector generated $9 billion in direct revenue in 2022, with spillover effects into other industries amounting to $11.85 billion.[22] The main function of child care continues to be enhancing labor force participation and boosting the overall efficiency and productivity of the workforce. Research by the Committee for Economic Development (CED) of The Conference Board highlights the strong link between

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[17] Ready Nation (2023): *$122 Billion: The Growing, Annual Cost of the Infant-Toddler Child Care Crisis*. https://strongnation.s3.amazonaws.com/documents/1598/05d917e2-9618-4648-a0ee-1b35d17e2a4d.pdf?1674854626&inline; filename="$122 Billion: The Growing, Annual Cost of the Infant-Toddler Child Care Crisis.pdf", accessed May 17, 2024.

[18] Powell, A., Thomason, S. and Jacobs, K. (2019): *Investing in Early Care and Education: The Economic Benefits for California.* UC Berkeley Labor Center. https://laborcenter.berkeley.edu/pdf/2019/Investing-in-Early-Care-and-Education.pdf, accessed July 10, 2024.

[19] Shellenback, K. (2004): *Child Care and Parent Productivity: Making the Business Case.* Cornell University. http://mildredwarner.org/s3.amazonaws.com/mildredwarner.org/attachments/000/000/074/original/154-21008542.pdf, accessed December 17, 2024.

[20] Powell, A., Thomason, S. and Jacobs, K. (2019): *Investing in Early Care and Education: The Economic Benefits for California.* UC Berkeley Labor Center. https://laborcenter.berkeley.edu/pdf/2019/Investing-in-Early-Care-and-Education.pdf, accessed July 10, 2024.

[21] Moms F1rst and BCG (2023): *The Employee Benefit That Pays For Itself.* https://momsfirst.us/wp-content/uploads/2024/03/The-Employe-Benefit-That-Pays-for-Itself_March-2024-2.pdf, accessed April 11, 2024.

[22] Committee for Economic Development of The Conference Board - CED (2024): Child Care in State Economies Report Series, Part 3: Recent Trends in Paid Child Care Usage. California Fact Sheet. https://education.ced.org/documents/childcarestateeconomies/state-sheets-part3/Child%20Care%20in%20State%20Economies%20Fact%20Sheet_Part%203_CA.pdf, accessed January 9, 2025.

child care accessibility and increased labor force participation. The findings suggest that changes in paid care usage are much more likely to lead to enhanced labor force attachment or participation, rather than increased labor force participation causing greater use of paid care.

Overall, ECE assists in creating a stable workforce for local businesses and supports a larger workforce than would exist if ECE were not available. Unfortunately, most California communities have a shortage of ECE providers and spaces. The lack of ECE facilities and spaces negatively and disproportionately impacts families of lower incomes and people of color, generally. Many families need some type of care for their children while they are working. Even where ECE is available or there is a surplus of ECE, many families cannot afford it. For single female heads of household, the cost of ECE often makes working impossible without the skills and education to secure higher-paying jobs. Many households in Riverside County experience similar cost challenges associated with ECE, particularly if they do not receive subsidized care (see **Chapter IV**, Section 2).

Challenges Facing the ECE Field

The value of ECE services is often overlooked because society tends to see the mostly female and lower-income workers as unskilled.[23] This bias, influenced by systemic inequalities beyond the ECE field, leads to lower wages, fewer opportunities for career growth, and a lack of respect for the profession.[24] While the emotional intelligence skills of ECE workers are essential to their job, these skills are often undervalued and underpaid. Recognizing these and other strengths of ECE providers could help move forward discussions on better compensation and professional recognition.

> *"Inquiries are either not qualified or demanding a higher wage than can be offered to start."*
> *Survey Respondent Comment*

The second major challenge in the ECE field is its specific economic factors. The profit margins are thin, and a majority of the costs are the wages of ECE workers. Raising wages for workers would lead to an increase in the price of ECE, the cost of which is already difficult for many families. Public funding and subsidies, on the other hand, do not cover the true cost of care, nor do they cover everyone who needs ECE services.

Trends in ECE Staffing and Enrollment in California

The Center for the Study of Child Care Employment (CSCCE) at the University of California, Berkeley, has tracked statewide staffing and enrollment trends in ECE since 2020.[25] Their findings show that enrollment in ECE centers

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[23] Andrew, Y. (2015) *Beyond professionalism: Classed and gendered capital in childcare wo*rk. Contemporary Issues in Early Childhood, 16(4), 305-321. https://doi.org/10.1177/1463949115616322
[24] Osinaike, P. T. (2023) *Developing and sustaining a gender-balanced early childhood teaching profession*. International Journal of Social Science and Human Research, 06(02). https://doi.org/10.47191/ijsshr/v6-i2-39
[25] Center for the Study of Child Care Employment (CSCCE) - UC Berkeley Webinar on January 23, 2025.

declined across all age groups during the COVID-19 pandemic and has only partially rebounded. Title 5 State Preschool programs experienced the largest decline, particularly among 4- and 5-year-olds, due in part to the phased roll-out of Transitional Kindergarten (TK). To adapt to reduced enrollment of 4-year-olds, many centers reported increasing enrollment of 3-year-olds (67% of directors), while fewer centers sought to expand Infant/Toddler enrollment (25%).

Staffing challenges are also intensifying. As TK expands, school districts are able to attract ECE teachers with higher wages and benefits, creating competition for qualified staff. ECE centers report difficulty retaining more experienced teachers and are more likely to employ less experienced staff. CSCCE reports turnover rates of 24% in 2023 and 32% in 2024 among ECE teaching staff statewide. Low wages relative to high living costs remain the leading factor in workforce turnover.

While these are statewide trends, they are reflected in Riverside County provider survey responses (see **Chapter III**) and Quality Counts Riverside participation data, where staffing shortages, turnover, and compensation challenges were also identified.

"Hard to find teachers that hold child development teacher permit; can't afford to pay desired salary to ECE worker; it's hard to find qualified teachers with the pay we offer."
Survey Respondent Comments

Lack of Substitute Teachers

In addition to the general challenge of finding a qualified workforce, ECE programs frequently face challenges related to the availability of substitute teachers. Unlike the public K-12 educational system, ECE programs lack a structured substitute teacher program. This deficiency has become particularly pronounced since the COVID-19 pandemic, which has exacerbated the lack of personnel available for sick leave or vacation coverage. Early educators, who work closely with young children and are thus more susceptible to illness, find themselves without a necessary buffer of substitute teachers. [26]

Professional Well-Being

For those who stay in the ECE field, the CSCCE highlights the significant stress experienced by educators, exacerbated by inadequate compensation and a lack of workplace support, including access to health benefits and

[26] Tate Sullivan, E. (2025): Why Don't Early Childhood Programs Have Access to Substitute Teachers? EdSurge, February 3, 2025. https://www.edsurge.com/news/2025-02-03-why-don-t-early-childhood-programs-have-access-to-substitute-teachers, accessed February 5, 2025.

retirement plans.[27] Center teaching staff had the highest proportion (65%) of perceived stress scores of six or more, which are considered high-stress. Furthermore, a substantial portion of educators exhibit symptoms of depression, and sleep deprivation is prevalent among educators (around 50% for directors and teaching staff in centers and FCCs), with Black educators reporting the highest rates. Additionally, more than half of early educators report having at least one chronic health condition.[28]

Racial Disparities in the ECE Workforce

A statewide workforce survey conducted in 2020 by the CSCCE identified disparities in pay and advancement opportunities across racial and ethnic groups within California's ECE workforce.[29] Findings show that White educators are consistently paid more than Black and Latine educators at comparable levels of educational attainment. Among lead teachers, median hourly wages were reported as: Asian educators $20.90, White $19.50, Latine $19.00, and Black $18.00. Black teachers, despite higher educational attainment rates compared to their White and Latine counterparts, had the lowest median wages.

The survey also found differences in educational attainment and job roles. Latine educators were least likely to hold a Bachelor's degree, reflecting barriers to higher education access and completion. White educators were disproportionately represented in leadership positions (54% of directors and lead teachers), while Black and Latine educators were more concentrated in lower-paying roles. For example, 81% of White teaching staff were lead teachers, compared to 64% of Latine staff.

These statewide findings highlight disparities in wages, educational access, and leadership representation across California's ECE workforce. While local-level data for Riverside County are limited, provider surveys in this study identified compensation and advancement as ongoing challenges, suggesting that similar dynamics may be present locally (see **Chapter III**).

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[27] These findings are based on a survey conducted among 540 FCC providers, 510 center directors, 445 center teaching staff, and 345 TK teachers, but does not include elementary school teachers.
[28] Muruvi, W., Powell, A., Kim, Y., Copeman Petig, A., & Austin, L.J.E. (2023): *The Emotional and Physical Well Being of Early Educators in California: Early Educator Well-Being Series*. Center for the Study of ECE Employment, University of California, Berkeley. https://cscce.berkeley.edu/wp-content/uploads/2023/12/california-ece-workforce-emotional-physical-well-being.pdf, accessed April 5, 2024.
[29] Kim, Y., Austin, L.J.E., & Hess, H. (2024): The Multilayered Effects of Racism on Early Educators in California: An Examination of Disparities in Wages, Leadership Roles, and Education. Center for the Study of Child Care Employment, University of California, Berkeley. https://cscce.berkeley.edu/wp-content/uploads/2024/02/The-Multilayered-Effects-of-Racism-on-Early-Educators-in-California.pdf, accessed April 2, 2024.

I.5 Study Organization

The Needs Assessment is divided into four key chapters, each focusing on important aspects of the ECE planning, including State mandates and requirements:

I. **Introduction, Background, and Organization** - This chapter outlines the purpose of the plan and provides an overview of the plan's structure. It also includes a discussion of approach, methodology, key terms, and an overview of ECE benefits and challenges.

II. **Current Demographics and ECE Needs** - Highlights include an analysis of Riverside County's demographics and a summary of ECE supply and demand in total and by region as of 2025 and 2030.

III. **Online Survey Results -** Insights from the online survey conducted with a varied group of stakeholders—including ECE providers, Local Education Agencies (LEAs), businesses, faith-based organizations, non-profits, and public officials—are summarized to highlight local priorities and challenges.

IV. **ECE Needs Assessment** – This chapter summarizes the required assessment of countywide ECE needs based on the State's standard template and provides more detailed information, data, and analysis than required by the template.[30]

This study is accompanied by several appendices, including:

A. Detailed Demographic Data
B. ECE Supply and Demand by Region – 2025 and 2030
C. Online Survey Instrument
D. Detailed Online Survey Results
E. State Needs Assessment Template: Riverside County - 2025

[30] Appendix E includes the information required for the State's template for Riverside County.

II. ECE Need and Current Demographics

This chapter presents a summary of current demographics in Riverside County and an ECE supply and demand analysis of the need for ECE for children 0 to 12 years old countywide and by the four regions, as discussed in **Chapter I**. The analysis is for the years 2025, or current conditions, and future conditions five years from now, or 2030. The study presents data and analysis for children in three age groups:

- Infants/Toddlers – 0 up to 2.5 years old, or 30 months
- Preschool – over 2.5 years old, or 31 months, to 4 years old (including 4-year-olds in TK)
- School Age – 5- to 12-year-olds

For this analysis, 2-year-olds are divided between Infants/Toddlers and Preschool, as some preschool providers are beginning to accept 2-year-olds due to the loss of 4-year-olds associated with TK. TK and Universal Pre-Kindergarten are creating major shifts in the ECE field and industry, and the full benefit and impact of these new programs throughout the State have yet to be fully understood and experienced, as discussed in **Chapter I**.

This chapter estimates the unmet need for ECE spaces in the County by age group and location. These data are used to create the State-required Needs Assessment presented in **Chapter IV**.

II.1 Current County Demographics – 2025 and 2030

Demographic data for this study is available from the US Census Bureau-American Community Survey (ACS), the California Department of Finance (DOF), Southern California Association of Governments (SCAG), and the American Institute for Research's (AIR) Early Learning Needs Assessment Tool (ELNAT). It should be noted that the estimates of population and children 0 to 12 years old vary slightly by data source. Each data source is summarized below.

- **Early Learning Needs Assessment Tool (ELNAT)** provides data on the number of children by age group and zip code, which is used to estimate children by zip code. This data is for 2020 based on ACS data for 2019 and thus is pre-COVID; ELNAT has not updated its projections, although they are in discussions with the State to do so.

- **Southern California Association of Governments (SCAG)** provides overall population, household, and employment projections by jurisdiction (i.e., incorporated cities) and 5-year intervals, but not by age; SCAG also does not provide data by zip code. These data are developed for transportation and other planning efforts throughout the region. It only includes one category or area for the Unincorporated Areas of the County, which are spread out throughout the County. Given that this is a more local forecast of growth in the County, the analysis uses this forecast as a controlling total for population growth countywide.

- **CA Department of Finance - P2B Forecast (DOF)** provides projections of population by age and year, including each year for 0 through 12-year-olds, at the County level, but does not provide data by jurisdiction or zip code. This data is used to establish how the percentages of the different age groups are projected to change from 2025 to 2030.

- **American Community Survey (ACS)—US Census** provides estimates of population by age by zip code for 2023, but the age groups are 0 to under 5 years old, 5 to 9 years old, and 10 to 14 years old, which are slightly different from the age groups used by ELNAT and this study. ACS also provides Labor Force Participation Rates by zip code as of 2023, which are used in the estimate of demand for ECE.

The analysis combines these data sources to estimate the population and the number of children by the three age groups for 2025 and 2030 by zip code, which are then aggregated to four regions. These include the Southwestern Region, Eastern Region, Mid Region, and Western Region.[31] It should be noted that zip code boundaries do not nest perfectly into the four regions. However, the use of zip codes allows for the easy gathering of the supply of ECE by region and comparing it to the estimated demand, discussed further below. The combined data and forecasts for the zip code analysis result in slightly different estimates of total children countywide by age group and 0 to 12 years old than the DOF P2B forecast.

Countywide estimates of total population by incorporated city are shown in **Table II-1** based on data from the SCAG provided for this study (see **Appendix A Table A-1** for more detail).[32] For this analysis, we use data for **2025**, the base year, and projections for **2030**. According to SCAG projections, Riverside County has a total population of 2.55 million residents as of 2025. By 2030, the County is expected to have 2.68 million residents, which represents a growth rate of 5% overall. There are 28 incorporated cities or jurisdictions and a large number of unincorporated communities spread across the County. The City of Riverside has the largest population of all cities, at almost 340,000 residents, followed by Morena Valley with about 217,000 residents and Corona with 155,000 residents. The unincorporated areas combined have the most residents at almost 419,000, or 16% of the total population.

Some cities are projected to grow more than others, with Riverside adding about 18,000 new residents by 2030. Coachella will add about 16,000 new residents. Only Corona is expected to lose a few residents, or 462. Overall, the County will add 127,200 residents over the next five years, according to the SCAG forecast.[33]

[31] Appendix Table A-4a summarizes the zip codes by the four regions.
[32] All data by zip code is included in Appendix A; only data by region is provided in this chapter.
[33] SCAG does not provide estimates of the number of children by location.

Table II-1
Estimated Total Population by City/Area - SCAG 2025 and 2030
Riverside County Needs Assessment - 2025

City/Area	Total Population - 2020	Total Population - 2025	% of Total Population - 2025	% Change 2020-2025	Total Population - 2030	% of Total Population - 2030	Net Change 2025-2030	% Change 2025-2030
Incorporated Cities								
Banning	29,280	29,577	1.2%	1.0%	30,032	1.1%	455	1.5%
Beaumont	45,891	49,417	1.9%	7.7%	52,018	1.9%	2,601	5.3%
Blythe	17,741	18,247	0.7%	2.9%	18,704	0.7%	457	2.5%
Calimesa	9,975	10,390	0.4%	4.2%	10,958	0.4%	568	5.5%
Canyon Lake	10,963	11,021	0.4%	0.5%	11,091	0.4%	70	0.6%
Cathedral City	51,333	52,618	2.1%	2.5%	54,345	2.0%	1,727	3.3%
Coachella	44,051	55,074	2.2%	25.0%	70,973	2.6%	15,899	28.9%
Corona	155,297	154,893	6.1%	-0.3%	154,431	5.8%	(462)	-0.3%
Desert Hot Springs	33,268	37,621	1.5%	13.1%	43,542	1.6%	5,921	15.7%
Eastvale	69,367	70,659	2.8%	1.9%	71,687	2.7%	1,028	1.5%
Hemet	90,317	95,109	3.7%	5.3%	101,135	3.8%	6,026	6.3%
Indian Wells	4,721	4,766	0.2%	1.0%	4,820	0.2%	54	1.1%
Indio	90,256	97,343	3.8%	7.9%	104,873	3.9%	7,530	7.7%
Jurupa Valley	105,304	110,652	4.3%	5.1%	115,139	4.3%	4,487	4.1%
Lake Elsinore	70,745	75,369	3.0%	6.5%	80,266	3.0%	4,897	6.5%
La Quinta	37,256	37,514	1.5%	0.7%	37,818	1.4%	304	0.8%
Menifee	102,619	107,788	4.2%	5.0%	113,027	4.2%	5,239	4.9%
Moreno Valley	208,489	217,018	8.5%	4.1%	225,250	8.4%	8,232	3.8%
Murrieta	110,878	113,777	4.5%	2.6%	115,154	4.3%	1,377	1.2%
Norco	26,085	27,864	1.1%	6.8%	29,479	1.1%	1,615	5.8%
Palm Desert	50,439	50,601	2.0%	0.3%	50,894	1.9%	293	0.6%
Palm Springs	44,135	44,343	1.7%	0.5%	44,900	1.7%	557	1.3%
Perris	80,456	90,871	3.6%	12.9%	100,263	3.7%	9,392	10.3%
Rancho Mirage	17,546	20,545	0.8%	17.1%	23,211	0.9%	2,666	13.0%
Riverside	316,603	339,445	13.3%	7.2%	357,499	13.3%	18,054	5.3%
San Jacinto	54,167	57,384	2.2%	5.9%	61,439	2.3%	4,055	7.1%
Temecula	109,997	114,467	4.5%	4.1%	118,797	4.4%	4,330	3.8%
Wildomar	37,424	41,257	1.6%	10.2%	44,987	1.7%	3,730	9.0%
Subtotal Incorporated	**2,024,603**	**2,135,630**	**83.6%**	**5.5%**	**2,246,732**	**83.8%**	**111,102**	**5.2%**
Unincorporated	**395,138**	**418,834**	**16.4%**	**6.0%**	**434,922**	**16.2%**	**16,088**	**3.8%**
Total County Population	**2,419,741**	**2,554,464**	**100.0%**	**5.6%**	**2,681,654**	**100.0%**	**127,190**	**5.0%**

Sources: Southern California Association of Governments (SCAG) Projections-2020-2035; Brion Economics, Inc.

Table II-2 summarizes population as of 2020, 2025, and 2030 from the DOF projections of population by age (i.e., the P2B report) and estimates the number of children by the three age groups described above. The 2025 estimate of total population is 2.45 million, and the 2030 estimate of population by DOF is 2.52 million, both slightly less than SCAG. Overall, by 2030, population will increase by 2.6% or by about 63,700 residents, according to the DOF report. As of 2025, there are an estimated 66,889 Infants/Toddlers, 67,432 Preschool children, and 256,295 School Age children for a total of about 390,616 children 0 to 12 years old (see **Appendix A Table A-2** for more detail on the P2B forecast).

Table II-2
Estimated Population and Children in California and Riverside County - P2B 2020, 2025, and 2030
Riverside County Needs Assessment - 2025

Age Group	2020 Population	2025 Estimated Population	% of Total Population - 2025	2030 Estimated Population	% of Total Population - 2030	Net Change 2025-2030	% Change 2025-2030
Riverside County							
Infants/Toddlers (1)	72,496	66,889	17%	64,876	18%	(2,014)	-3.0%
Preschool (2)	81,538	67,432	17%	65,540	19%	(1,893)	-2.8%
4-Year-Olds	33,434	26,656	7%	26,319	7%	(337)	-1.3%
School Age (3)	283,868	256,295	66%	223,661	63%	(32,634)	-12.7%
Total 0 to 12 Years Old	**437,901**	**390,616**	100%	**354,076**	100%	**(36,540)**	-9.4%
Total Population	**2,423,288**	**2,452,358**		**2,516,026**		**63,668**	2.6%
Children, 0-12 Years Old, as % of Population	**18.1%**		**15.9%**		**14.1%**		**-1.9%**
California							
Total Population	39,520,071	39,024,054		39,430,871		406,817	1.0%
Total 0 to 12 Years Old	6,394,459	5,798,009		5,384,216		(413,793)	-7.7%
Children, 0-12 Years Old, as % of Population	16.2%		14.9%		13.7%		-1.2%

(1) Infants and Toddlers are defined as children from birth up to 30 months old.
(2) Preschool children are defined as children aged from 31 months to 4 years.
(3) School Age is defined as children 5 to 12 years old.
Sources: CA Department of Finance - P2B Report; Brion Economics, Inc.

By 2030, a loss of about 36,500 children ages 0 to 12 is forecast, or a reduction of 9.4%. School Age children will see the largest reduction by 12.7%. Infants/Toddlers and Preschool children will be reduced by about 3% each. Children as a percentage of total population in the County is currently 15.9% but will be lower in 2030 at 14.1%, representing a decline of 1.9%. In 2020, children as a percentage of total population in the County was 18.1%. The estimate of 14.1% for 2030 represents a 4% loss over the 10-year period.

This type of decline is similar to projected trends in many urban counties in California due to the high cost of living in California. Across the State as a whole, a reduction of about 414,000 children ages 0 to 12 years old is expected, or a loss of 7.7%. Currently, children as a percentage of total population statewide is 14.9% but will be lower in 2030 at 13.7%, or a decline of 1.2%.

Table II-3 summarizes the growth rate assumptions by data source. These growth rates are used to estimate future children by age group in the analysis. As noted above, there is a projected decline in children as a percentage of total population.

Table II-3
Growth Assumptions from 2020 to 2025 and 2030 for County by Source
Riverside County Needs Assessment - 2025

Item	Percentage of Total Population				
	Infants/ Toddlers - 0 to 30 mos old	Preschool - 31 mos to 4 yrs old	4-Year-Olds	School Age - 5 to 12 yrs old	All Children - 0 to 12 years old
2020 AIR ELNAT	3.1%	3.4%	1.4%	11.3%	17.8%
2025 DOF - P2B	2.7%	2.7%	1.1%	10.5%	15.9%
Percentage Change 2020-2025	**-11.4%**	**-18.8%**	**-22.0%**	**-7.9%**	**-10.6%**
2030 DOF - P2B	2.6%	2.6%	1.0%	8.9%	14.1%
Percentage Change 2025-2030	**-5.5%**	**-5.3%**	**-3.8%**	**-14.9%**	**-11.6%**

Sources: AIR-ELNAT 2020; DOF - P2B Report; Brion Economics, Inc.

Population and Children by Region

Based on data availability and overall goals of the study, BEI will estimate the supply and demand for ECE spaces by region, as defined in **Table I-1**. **Table II-4** summarizes the 2025 estimated population by region, including estimated children 0 to 12 years old, using the 2020 data from the American Community Survey by zip code (ACS) for total population and ELNAT for children by age group as a baseline (**Table A-6**) and a combination of the growth rates for different cities based on SCAG data (**Table II-1**) as well as the projected changes in age groups as presented in **Table II-3** (detailed growth assumptions by Zip Code can be found in **Table A-5**).[34] The estimated total population by Riverside County as of 2025 is about 2.58 million residents, of which about 411,000 are children, ages 0 to 12 years old.[35]

[34] 2020 data is the latest data available by ELNAT. ELNAT age groups vary slightly from those proposed for this study.
[35] Population projections by zip code can be found in Appendix A, Table A-8.

Labor Force Participation Rates of Children with Working Parents

Table II-4 further includes the Labor Force Participation Rates (LFPRs) of children with working parents. These rates are used to estimate the demand for licensed spaces in Needs Assessments. The US Census – ACS provides LFPRs for children under 6 and for children 6 to 17 years old. For this study, we are focused on children 0 to 12, and thus, both rates are used. Currently, the LFPR for children under age 6 in Riverside County is about 65% or just under two-thirds of children with working parents under 6 years old. The rate for children with working parents 6 to 17 years old is 65.7%. These rates vary by region, with the Eastern Region having the highest rates, averaging 72.1%, and the Southwestern Region having the lowest rate at 60.7% overall. Countywide, the average LFPR for children with working parents for all age groups is 65.4% (LFPRs for 2023 by zip code can be found in **Appendix A Table A-7**).

Table II-4
Estimated Population and Children per Age Group and LFPRs by Region - 2025
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Total Population	**506,443**	**478,038**	**674,041**	**922,926**	**2,581,448**
Children					
Infants/Toddlers	10,903	14,153	19,246	26,183	70,484
Preschool	10,058	14,176	20,473	26,330	71,037
School Age	40,757	54,351	76,466	98,345	269,918
Total Children - 0 to 12 Years Old	**61,717**	**82,680**	**116,184**	**150,858**	**411,440**
Children as % of Total Population	12.2%	17.3%	17.2%	16.3%	15.9%
Children with Working Parents					
Infants/Toddlers	7,813	8,500	10,781	18,739	45,833
Labor Force Participation Rates	71.7%	60.1%	56.0%	71.6%	65.0%
Preschool	7,208	8,498	11,475	18,881	46,062
Labor Force Participation Rates	71.7%	59.9%	56.1%	71.7%	64.8%
School Age	29,450	34,279	48,255	65,401	177,385
Labor Force Participation Rates	72.3%	63.1%	63.1%	66.5%	65.7%
Total Children - 0 to 12 Years Old	**44,471**	**51,277**	**70,512**	**103,020**	**269,279**
Labor Force Participation Rates	72.1%	62.0%	60.7%	68.3%	65.4%

Note: See Appendix A for detailed data by zip code and region.

Sources: U.S. Census; AIR-ELNAT 2020; Southern California Association of Governments (SCAG) Projections 2020-2035; Brion Economics, Inc.

Table II-5 provides the same data discussed above by region as of 2030. As shown, total population and number of children vary by region. The Western Region has the highest population and number of children, 0 to 12, of the four regions, at about 1 million residents, and 140,000 children, 0 to 12.[36]

Table II-5
Estimated Population and Children per Age Group by Region - 2030
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Total Population	**546,919**	**500,412**	**706,311**	**965,825**	**2,719,467**
Children					
Infants/Toddlers	11,161	14,001	19,097	25,953	70,212
Preschool	10,323	14,063	20,345	26,147	70,879
School Age	37,544	48,401	68,178	87,676	241,800
Total Children - 0 to 12 Years Old	**59,028**	**76,465**	**107,620**	**139,777**	**382,890**
Children as % of Total Population	10.8%	15.3%	15.2%	14.5%	14.1%
Children with Working Parents					
Infants/Toddlers	8,006	8,409	10,707	18,584	45,705
Labor Force Participation Rates	71.7%	60.1%	56.1%	71.6%	65.1%
Preschool	7,409	8,429	11,413	18,761	46,011
Labor Force Participation Rates	71.8%	59.9%	56.1%	71.8%	64.9%
School Age	27,080	30,537	43,012	58,247	158,876
Labor Force Participation Rates	72.1%	63.1%	63.1%	66.4%	65.7%
Total Children - 0 to 12 Years Old	**42,495**	**47,375**	**65,132**	**95,591**	**250,593**
Labor Force Participation Rates	72.0%	62.0%	60.5%	68.4%	65.4%

Note: See Appendix A for detailed data by zip code and region.
Sources: U.S. Census; AIR-ELNAT 2020; Southern California Association of Governments (SCAG) Projections 2020-2035; Brion Economics, Inc.

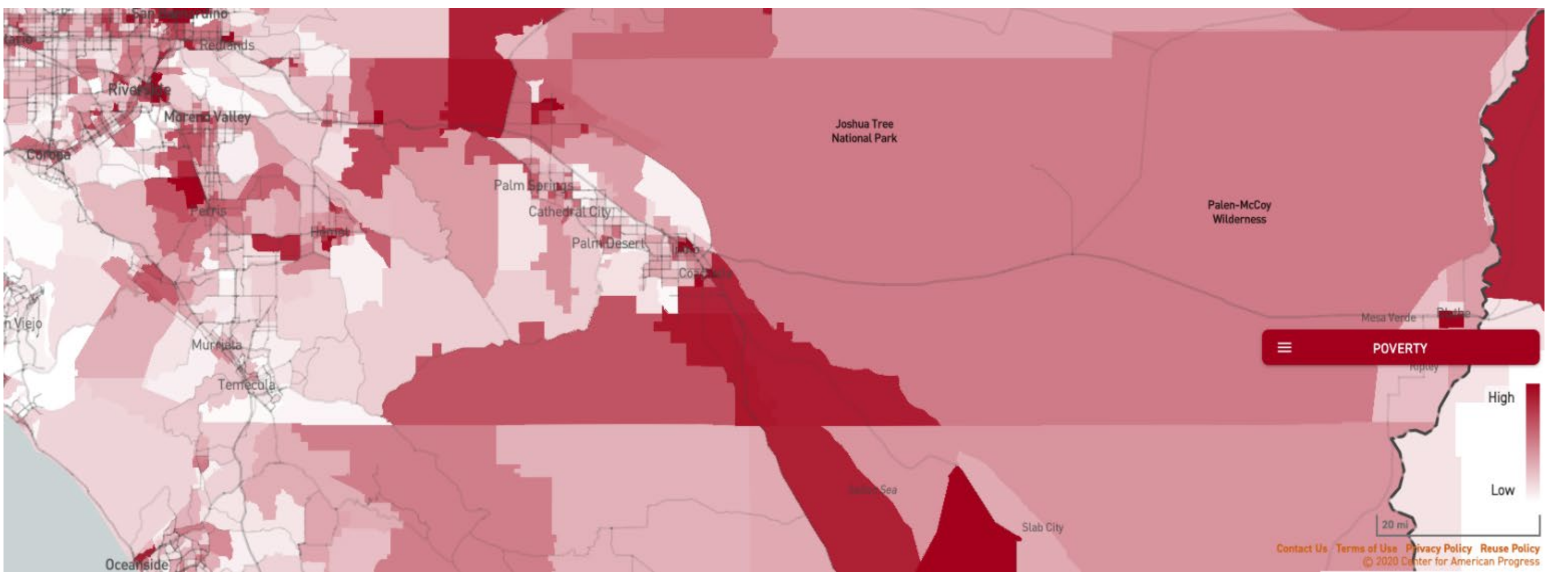
Table II-6 summarizes race/ethnicity by region. About 50% of the County's residents identify as Hispanic and the remainder as Non-Hispanic. About 42% of the population identify as White, about 24% or one quarter of the population as Other Races, and 18% identify as Two or More Races. The Western Region has the highest percentage of population of some other race at 31.6% and the highest percentage of Hispanic population at 56.7%. On the other end, the Southwestern Region has the highest percentage of White population at 52.2% and the lowest percentage of Hispanic residents at 37.2%. More variations by region can be seen in the table.[37]

[36] Population projections by zip code can be found in Appendix A, Table A-9.
[37] Race and ethnicity data by zip code can be found in Appendix A, Table A-10.

Table II-7 summarizes poverty rates for families with children by age of children by region for 2023. Countywide, there are about 571,000 families in Riverside County. Of these, 8.5% live under the federal poverty level (FPL), which was set at $30,900 for a family of four with two children in 2023.[38] Families with children ages under 5 and 5 to 17 generally have the highest poverty rates, with 16.8% under the FPL countywide. Poverty rates for all families are particularly high in the Mid Region and Eastern Region. Especially, families with children under 17 have higher poverty rates in the Eastern Region, reaching up to 23.5% for families with children under 5 and between 5 and 17 years old. The Southwestern Region has the lowest poverty rates, with only 6.5% of families below the FPL.[39]

The map in **Exhibit II-1** further illustrates regional differences in poverty rates. In general, there is an East-West divide, i.e., poverty rates are higher in the eastern part of the County, with pockets of high poverty rates in urban areas in the Mid and Western Region, such as Indio, Hemet, Perris, Riverside, Moreno Valley, and Corona.

Exhibit II-1[40]



[38] See https://www.census.gov/library/publications/2024/demo/p60-283.html, viewed May 24, 2025. See Poverty Thresholds table for 2023.
[39] Detailed data by zip code can be found in Appendix A, Table A-11.
[40] This map was published by the Center for American Progress (2020). It can be found here: https://childcaredeserts.org/?lat=36.268458949361516&lng=-118.77699100000001&zm=8.492117052946528&lyr=ccpoverty#!

Table II-6
Estimated Population in Riverside County per Race/Ethnicity by Region - 2023
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Total Population in County	**471,390**	**530,163**	**658,318**	**848,750**	**2,508,621**
Race					
One race					
White	217,020	203,646	343,818	306,036	**1,070,521**
White - %	46.0%	38.4%	52.2%	36.1%	**42.7%**
Black or African American	15,330	57,214	37,545	49,573	**159,662**
Black - %	3.3%	10.8%	5.7%	5.8%	**6.4%**
American Indian and Alaska Native	6,231	7,659	6,679	9,256	**29,825**
Native - %	1.3%	1.4%	1.0%	1.1%	**1.2%**
Asian	14,807	24,972	54,540	80,194	**174,513**
Asian - %	3.1%	4.7%	8.3%	9.4%	**7.0%**
Native Hawaiian and Other Pacific Islander	881	2,119	2,591	2,713	**8,304**
Native Hawaiian - %	0.2%	0.4%	0.4%	0.3%	**0.3%**
Some Other Race	91,646	146,931	95,957	268,181	**602,715**
Other Race - %	19.4%	27.7%	14.6%	31.6%	**24.0%**
Two or More Races	125,474	87,622	117,188	132,797	**463,081**
Two or More Races - %	26.6%	16.5%	17.8%	15.6%	**18.5%**
Ethnicity					
Hispanic or Latino (of any race)	254,992	280,860	245,177	481,209	**1,262,239**
Hispanic - %	54.1%	53.0%	37.2%	56.7%	**50.3%**
Not Hispanic or Latino	216,398	249,303	413,141	367,541	**1,246,383**
Not Hispanic - %	45.9%	47.0%	62.8%	43.3%	**49.7%**
White alone	175,619	146,478	282,232	211,217	**815,546**
White alone - %	37.3%	27.6%	42.9%	24.9%	**32.5%**
Black or African American alone	13,431	54,963	35,261	47,059	**150,714**
Black alone - %	2.8%	10.4%	5.4%	5.5%	**6.0%**
Asian alone	14,377	24,155	52,747	78,057	**169,336**
Asian alone - %	3.0%	4.6%	8.0%	9.2%	**6.8%**
Two or More Races	9,708	17,212	32,911	24,097	**83,928**
Two or more races - %	2.1%	3.2%	5.0%	2.8%	**3.3%**

Note: See Appendix A for detailed data by zip code and region.

Sources:
U.S. Census Bureau, U.S. Department of Commerce. "ACS Demographic and Housing Estimates." American Community Survey, ACS 5-Year Estimates Data Profiles, Table DP05, 2023,
https://data.census.gov/table/ACSDP5Y2023.DP05?q=DP05&g=050XX00US06065,06065$8600000&moe=false&tp=true. Accessed on April 10, 2025.
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Table II-7
Families Below Poverty Level by Region - 2023
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
All Families					
Total # of Families	113,679	108,203	160,838	187,941	**570,661**
% Below Poverty Level	10.0%	10.7%	6.5%	8.0%	**8.5%**
# of Families Below Poverty Level	11,405	11,527	10,472	14,948	**48,352**
Families with Related Children of Householder under 18 Years Below Poverty Level					
With related children of householder under 5 years					
Total # of Families	5,917	7,892	12,259	13,811	**39,879**
% Below Poverty Level	13.4%	11.4%	7.2%	9.5%	**9.8%**
# of Families Below Poverty Level	790	904	883	1,317	**3,893**
With related children of householder under 5 years and 5 to 17 years					
Total # of Families	8,814	13,792	17,482	21,558	**61,646**
% Below Poverty Level	23.5%	18.7%	12.9%	16.1%	**16.8%**
# of Families Below Poverty Level	2,069	2,573	2,263	3,460	**10,365**
With related children of householder 5 to 17 years					
Total # of Families	29,225	36,176	53,122	64,403	**182,927**
% Below Poverty Level	15.2%	13.4%	6.9%	9.8%	**10.5%**
# of Families Below Poverty Level	4,428	4,846	3,664	6,282	**19,219**

Note: See Appendix A for detailed data by zip code and region.
Sources:
U.S. Census Bureau, U.S. Department of Commerce. "Poverty Status in the Past 12 Months of Families." American Community Survey, ACS 5-Year Estimates Subject Tables, Table S1702, 2023,
https://data.census.gov/table/ACSST5Y2023.S1702?q=poverty&g=050XX00US06065,06065$8600000&moe=false&tp=true. Accessed on April 10, 2025.
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Table II-7a shows the median income of different household types for 203 in Riverside County, including household size, presence of children, etc. The overall countywide median household income as of 2024 is $93,172. The median income of Hispanic households, which are 42.3% of all households, is approximately $90,500 or slightly lower than the overall median income.

The median household income varies significantly by type of household, presence of children, and other demographic factors. The median household income of married-couple families with children is $127,180. For single female householders with children under 18, this figure is $64,557 or significantly less than married couples with children or about 50%. For male householders with children under 18, the median income is $63,377, similar to that of female householders.

Table II-7a
Number of Households by Household Income, Type, and Size of Household - 2024
Riverside County Needs Assessment - 2025

Household Type or Size	Riverside County		
	Number	% Distribution	Median income
HOUSEHOLD INCOME BY RACE AND HISPANIC OR LATINO ORIGIN OF HOUSEHOLDER (1)			
Households	797,569	797,569	$93,172
One race			
White	361,634	45.3%	$95,431
Black or African American	53,906	6.8%	$87,459
American Indian and Alaska Native	13,403	1.7%	$86,787
Asian	55,852	7.0%	$110,050
Some other race	150,202	18.8%	$88,605
Two or more races	160,365	20.1%	$91,710
Hispanic or Latino origin (of any race)	337,394	42.3%	$90,467
White alone, not Hispanic or Latino	319,005	40.0%	$94,848
HOUSEHOLD INCOME BY AGE OF HOUSEHOLDER			
15 to 24 years	14,486	1.8%	$62,224
25 to 44 years	252,378	31.6%	$104,103
45 to 64 years	300,131	37.6%	$110,081
65 years and over	230,574	28.9%	$64,220
FAMILIES			
Families	592,840	592,840	$104,129
With own children of householder under 18 years	239,542	40.4%	$103,228
With no own children of householder under 18 years	353,298	59.6%	$105,023
Married-couple families	423,440	71.4%	$121,967
With own children under 18 years	168,566	28.4%	$127,180
Female householder, no spouse present	112,330	18.9%	$64,577
With own children under 18 years	48,993	8.3%	$50,083
Male householder, no spouse present	57,070	9.6%	$81,124
With own children under 18 years	21,983	3.7%	$63,377
FAMILY INCOME BY FAMILY SIZE			
2-person families	222,321	37.5%	$87,102
3-person families	125,012	21.1%	$97,772
4-person families	113,989	19.2%	$119,999
5-person families	71,705	12.1%	$120,663
6-person families	36,003	6.1%	$132,591
7-or-more person families	23,810	4.0%	$144,749
FAMILY INCOME BY NUMBER OF EARNERS			
No earners	82,295	13.9%	$53,018
1 earner	184,042	31.0%	$76,563
2 earners	222,518	37.5%	$123,408
3 or more earners	103,985	17.5%	$162,511
NONFAMILY HOUSEHOLDS			
Nonfamily households	204,729	204,729	$51,082
Female householder	106,386	52.0%	$45,019
Living alone	89,242	43.6%	$38,777
Not living alone	17,144	8.4%	$100,481
Male householder	98,343	48.0%	$60,925
Living alone	71,453	34.9%	$47,619
Not living alone	26,890	13.1%	$92,640

Median Income in the Past 12 Months (in 2024 Inflation-Adjusted Dollars)

(1) Please note that not all races are displayed because there were an insufficient number of sample cases in the County.

Sources:

U.S. Census Bureau. "Median Income in the Past 12 Months (in 2024 Inflation-Adjusted Dollars)." American Community Survey, ACS 1-Year Estimates Subject Tables, Table S1903, https://data.census.gov/table/ACSST1Y2024.S1903?q=S1903+riverside+county&moe=false. Accessed on 18 Sep 2025.

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II.2 ECE Supply and Demand – 2025 and 2030

This section presents the estimates of ECE supply and demand countywide and in four regions. Supply refers to the number of ECE providers and spaces available for children by age group. Demand refers to the need for ECE by age group. Supply and demand are compared to each other, and estimated shortfalls are considered "unmet" need by age group. The methodology used to estimate demand is described below. The ECE supply data was collected during the Spring of 2025 and represents the most current data available. **Appendix B** provides detailed comparisons of supply and demand for the County as a whole and each region for both 2025 and 2030. This section presents high-level summaries and graphics of the results of the analysis.

Supply and Demand at 2025

Supply of ECE Providers

Table II-8 provides a detailed breakdown of ECE providers[41] in Riverside County. Currently, there are 2,596 license-exempt center-based and licensed ECE providers. The 293 school sites, which offer Transitional Kindergarten (TK), are included in this count. There are also 25 school districts and 19 charter schools that provide after-school services through the Extended Learning Opportunities Program (ELOP) and After School Education and Safety Program (ASES) funding from the State.[42] ELOP and ASES provide a large portion of the available School Age care in the County, along with other licensed providers. There are 556 licensed center-based providers in the County, 1,676 Family Child Care (FFCs) providers, and 52 license-exempt centers.

ECE centers that are exempt from licensure are not to follow the same capacity guidelines as licensed programs; therefore, data on attendance for the Resource and Referral (R&R) at Riverside County Office of Education (RCOE) is only available for the children receiving Alternative Payment vouchers (see **Chapter IV** for more information on subsidized programs). Hence, there may be additional before- and after-school programs in the County which are not accounted for in this analysis.

There are an additional 2,216 known, unlicensed Family, Friends, and Neighbors (FFNs) providers in the County, serving 4,216 children. Data provided for FFN care for this analysis is for families receiving ECE subsidies through the Riverside County Office of Education. Families who received subsidized ECE through any of the CalWORKs and California Alternative Payment Program have the option to select an FFN. Data on FFNs receiving vouchers through CalWORKs Stage 1, administered by Riverside County Department of Public Social Services, was not available for this analysis. Private pay parents who are not associated with any ECE subsidy may also utilize FFNs;

[41] ECE providers represent the individual businesses or public/non-profit programs that provide ECE services; the ECE workforce includes the owners of ECE businesses, directors of ECE businesses and programs, and the teachers and other staff that support programs.
[42] These spaces were estimated based on the allocated funding, which is provided to each school district, not by school site.

however, there is no way to adequately capture the data for this category. The exact number of children served by FFNs and other unlicensed providers by age group is, therefore, not available. As this analysis is focused on license-exempt center-based and licensed care, data from FFN providers is not included in the estimates of ECE spaces in the subsequent tables; however, these providers serve additional children in the County.

Table II-8
ECE Providers by Region and Countywide - 2025
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Family Child Care (FCC) Providers					
Small FCCs - 6 Spaces	6	2	3	5	**16**
Small FCCs - 8 Spaces	192	214	251	187	**844**
Large FCCs - 12 Spaces	2	8	1		**11**
Large FCCs - 14 Spaces	256	169	195	185	**805**
Subtotal FCC Providers	**456**	**393**	**450**	**377**	**1,676**
Licensed Providers					
Licensed ECE Centers	121	83	130	222	**556**
License-Exempt Providers (1)					
L-E Center-Based Providers (2)	3	2	44	3	**52**
Transitional Kindergarten (3)	61	54	80	98	**293**
After-School Programs at Charter Schools	4	5	7	3	**19**
Subtotal License-Exempt Providers	**68**	**61**	**131**	**104**	**364**
Total # of Providers	**645**	**537**	**711**	**703**	**2,596**
Family, Friends, and Neighbors (FFNs)	517	629	452	618	**2,216**
Total # of Providers incl. FFNs	**1,162**	**1,166**	**1,163**	**1,321**	**4,812**

(1) This excludes the number of after-school programs at public school sites. The number of spaces provided by these programs are estimated in Table II-10.

(2) These are only providers serving children via the voucher programs. No exact data on all license-exempt center-based providers is available from the local Resource and Referral Agency. The location of the spaces is based on the zip codes of the served children, not the location of the providers.

(3) This is the number of school sites, public and charter schools, with TK programs in the County by region.

Sources:
California Department of Social Services - Community Licensing; California Department of Education - DataQuest; Riverside Resource & Referral Agency; Brion Economics, Inc.

After-School Programs at Public School Sites

In order to estimate the number of children served by ELOP, ASES, and 21st Century programs in the County, funding data from the State Department of Education is analyzed for this study. Exact data on the number of children served by each school district by these programs is not available or collected by local school districts. This analysis assumes that ELOP, ASES, and 21st century program funding are combined to provide after-school programs, instead of funding separate programs.[43] **Table II-9** summarizes the funding from these programs by local school district. Total funding equals $368.5 million, of which $41 million is from ASES, $326 million from ELOP, and $1.4 million from 21st Century. ELOP and ASES funding at charter schools equal about $12.8 million. ELOP provides the bulk of the program funding for after-school programs, making it the most reliable proxy for estimating the number of children served. ASES and 21st Century funding is reported in **Table II-9** but only ELOP data was used to estimate the number of children in before- and after-school programs, to be conservative.

ELOP funding for FY 23-24 has two average expenditure rates per student: 1) $2,750 and 2) $1,803.[44] **Appendix B Table B-19** provides detailed calculations of the number of children served by ELOP funding by the 23 local school districts in the County, and **Appendix B Table B-20** provides the number of children served by ELOP funding by 19 charter schools receiving ELOP funding. These estimates distinguish between estimated spaces funded for TK and grades K through 6 based on the distribution of TK students by district. The estimates for after-school programs for TK students are only used in the detailed analysis of TK wrap-around care (**Table II-13**), while the estimates of after-school program spaces for students from K to Grade 6 are used in the supply and demand analyses (Tables II-11, II-12, II-16, II-17).

[43] This assumption was confirmed by Allison Haynes, Program Coordinator for after-school programs at the Riverside County Office of Education.

[44] See Legislative Analyst's Office (2005): *The 2025-26 Budget. Expanded Learning Opportunities Program.* https://lao.ca.gov/Publications/Report/4977, accessed October 17, 2025. In addition, the applicable per student rate for each LEA is provided by the California Department of Education when retrieving the allocated funds via this website: https://ias.cde.ca.gov/apportionment/PrincipalApportionmentWebExhibit?SchoolYear=2024&ReportType=P1&CertificationType=Non.

Table II-9
Funding for ELOP, ASES, and 21st Century by School District
Riverside County Needs Assessment - 2025

Local Educational Agency	Region	ASES Funding FY 24/25	ELOP Funding FY 23/24	21st Century FY 24/25	Total Funding
Alvord Unified	Western	$3,647,200	$18,657,197	$0	$22,304,397
Banning Unified	Mid Region	$764,867	$5,603,101	$0	$6,367,968
Beaumont Unified	Mid Region	$399,216	$6,383,673	$0	$6,782,889
City of Moreno Valley (1)	Mid Region	$7,020,158	$0	$45,784	$7,065,942
Moreno Valley Unified	Mid Region	$0	$32,963,029	$0	$32,963,029
Val Verde Unified	Western	$0	$20,807,957	$0	$20,807,957
Coachella Valley Unified	Eastern	$3,708,134	$20,087,902	$1,048,680	$24,844,716
Corona-Norco Unified	Western	$2,524,521	$26,237,280	$0	$28,761,801
Desert Center Unified	Eastern	$0	$50,000	$0	$50,000
Desert Sands Unified	Eastern	$2,544,701	$22,945,690	$0	$25,490,391
Hemet Unified	Mid Region	$3,907,032	$24,698,464	$0	$28,605,496
Jurupa Unified	Western	$2,550,514	$20,004,349	$381,596	$22,936,459
Lake Elsinore Unified	Southwestern	$1,729,604	$12,045,992	$0	$13,775,596
Menifee Union Elementary	Southwestern	$0	$9,029,031	$0	$9,029,031
Murrieta Valley Unified	Southwestern	$0	$7,295,829	$0	$7,295,829
Nuview Union	Mid Region	$349,993	$2,450,737	$0	$2,800,730
Palm Springs Unified	Eastern	$3,162,250	$24,427,545	$0	$27,589,795
Palo Verde Unified	Eastern	$0	$2,808,722	$0	$2,808,722
Perris Elementary	Western	$1,271,768	$10,420,303	$0	$11,692,071
Perris Union High	Southwestern	$203,483	$0	$0	$203,483
Riverside Unified	Western	$5,207,707	$24,108,749	$0	$29,316,456
Romoland Elementary	Southwestern	$304,343	$4,099,589	$0	$4,403,932
San Jacinto Unified	Mid Region	$1,372,414	$11,900,322	$0	$13,272,736
Temecula Valley Unified	Southwestern	$152,612	$6,409,032	$0	$6,561,644
Subtotals		**$40,820,517**	**$313,434,493**	**$1,476,059**	**$355,731,070**
Charter Schools (2)	Countywide	$203,483	$12,595,013	$0	$12,798,496
Countywide Totals		**$41,024,000**	**$326,029,506**	**$1,476,059**	**$368,529,565**

(1) It is assumed that the money allocated to the City of Moreno Valley are pooled with the ELOP funds of the two school districts which serve the area - Moreno Valley Unified and Val Verde Unified. These two districts were not listed as recipients of ASES or 21st Century funds themselves.

(2) For detailed information on charter schools in the County, see Table B-20.

Sources:
California Department of Education: https://www.cde.ca.gov/fg/fo/r27/asesresults2024.asp accessed 5.5.25.
California Department of Education: Web Apportionment Web Exhibit.
https://www.cde.ca.gov/fg/fo/r27/cclcemassetsresults24.asp, accessed 5.5.25.
Brion Economics, Inc.

Table II-10 summarizes the number of children in TK and available spaces in TK wrap-around care programs and after-school programs for children in Kindergarten through 6th grade. In total, there are 11,934 four- and five-year-old children enrolled in TK programs in the County in the school year 2024/25. Based on the ratio of TK students to total students through 6th grade, 5% of the spaces are assumed to serve TK children with wrap-around care. In total, there are an estimated 103,776 after-school program spaces countywide, including 99,116 spaces serving children K through 6th grade.

Table II-10
License-Exempt Spaces, Including TK, at Local Schools by Region - 2025 (1)
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total	Percent Distribution
Transitional Kindergarten						
4-Year-Olds	1,623	2,207	3,147	3,084	10,061	84%
5-Year-Olds	322	421	545	585	1,873	16%
Subtotals	**1,945**	**2,628**	**3,692**	**3,669**	**11,934**	**100%**
Estimates of Before- and After-School Program Spaces (1)						
Local Public Schools (LEAs)						
TK	768	1,120	840	1,788	**4,515**	5%
School Age	18,411	23,054	15,333	38,216	**95,014**	95%
Subtotals	**19,179**	**24,174**	**16,173**	**40,004**	**99,529**	**100%**
Charter Schools						
TK	47	22	62	14	**145**	3%
School Age	1,475	739	1,182	706	**4,102**	97%
Subtotals	**1,522**	**761**	**1,244**	**720**	**4,247**	**100%**
Total Spaces						
TK	815	1,142	902	1,802	**4,660**	4%
School Age	19,886	23,793	16,515	38,922	**99,116**	96%
Total After-School Spaces	**20,701**	**24,935**	**17,417**	**40,724**	**103,776**	**100%**
Percent Distribution	20%	24%	17%	39%	100%	

(1) Estimates of students served are based on the funding for the ELOP (data from FY 23/24). It is assumed that this funding is supplemented by ASES and 21st century funds; excludes Family, Friends and Neighbor (FFN) spaces.

Sources:
California Department of Education; Riverside County Consortium for Early Learning Services;
Brion Economics, Inc.

Total Supply of ECE Spaces

Overall, the total license-exempt center-based and licensed ECE spaces available in Riverside County equal 162,015, as shown in **Table II-11**. Within this, small and large FCCs offer a total of 18,250 spaces (11% of supply) serving children ages 0 to 12 years. Licensed ECE centers offer a total of 32,315 spaces (20% of supply). Another 400 spaces are provided by license-exempt center-based providers (less than 1% of supply). A total of 61 school sites currently offer TK to 11,934 4- and 5-year-olds (7% of supply). License-exempt before- and after-school programs like ASES and ELOP at school sites serve an estimated 99,116 School Age children (61% of supply), excluding wrap-around care for TK children. The supply of ECE spaces by region and the percent distribution of spaces by program is also shown in **Table II-11,** and by provider type in **Exhibit II-2.**

Exhibit II-2

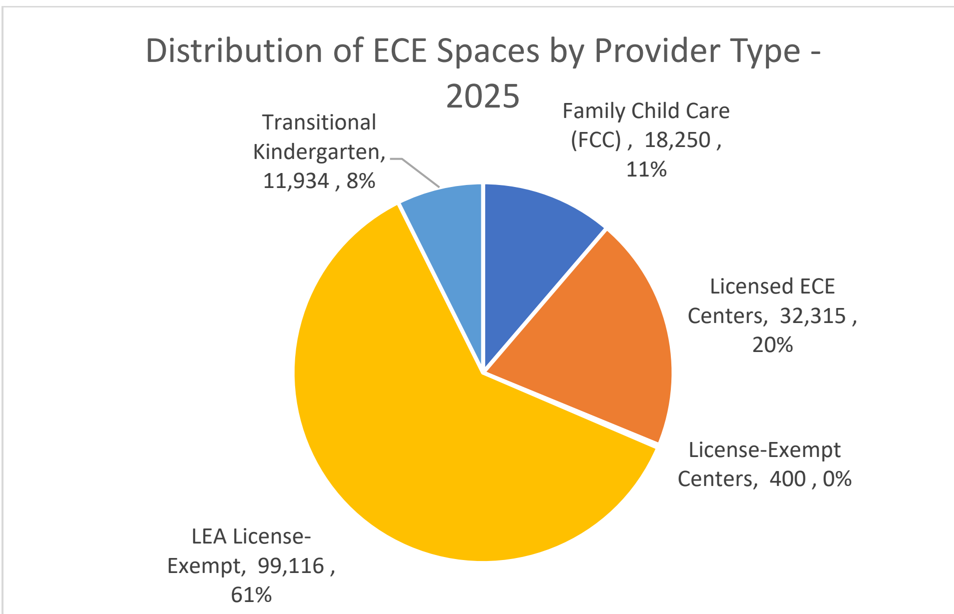


Table II-11
ECE Spaces by Region and Countywide - 2025
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Family Child Care (FCC) - Spaces					
Infants/Toddlers	1,172	971	1,097	939	**4,179**
Preschool	1,876	1,523	1,738	1,496	**6,633**
School Age	2,132	1,692	1,933	1,681	**7,438**
Subtotals	**5,180**	**4,186**	**4,768**	**4,116**	**18,250**
Percent Distribution	28%	23%	26%	23%	100%
Licensed ECE Centers - Spaces					
Infants/Toddlers	393	407	707	1,002	**2,509**
Preschool	4,709	4,081	7,063	9,850	**25,703**
School Age	978	334	826	1,965	**4,103**
Subtotals	**6,080**	**4,822**	**8,596**	**12,817**	**32,315**
Percent Distribution	19%	15%	27%	40%	100%
License-Exempt Spaces					
Center-Based License-Exempt Spaces (1)					
Infants/Toddlers	-	-	1	-	**1**
Preschool	-	-	4	-	**4**
School Age	16	20	286	73	**395**
Subtotals	**16**	**20**	**291**	**73**	**400**
Percent Distribution	4%	5%	73%	18%	100%
Before- and After-School Programs Provided by Schools (2)					
School Age	19,886	23,793	16,515	38,922	**99,116**
Percent Distribution	20%	24%	17%	39%	100%
Transitional Kindergarten					
4-Year-Olds	1,623	2,207	3,147	3,084	**10,061**
5-Year-Olds	322	421	545	585	**1,873**
Subtotals	**1,945**	**2,628**	**3,692**	**3,669**	**11,934**
Percent Distribution	16%	22%	31%	31%	100%
Total # of ECE Spaces					
Infants/Toddlers	1,565	1,378	1,805	1,941	**6,689**
Preschool	8,208	7,811	11,952	14,430	**42,401**
School Age	23,334	26,260	20,105	43,226	**112,925**
Total # of ECE Spaces	**33,107**	**35,449**	**33,862**	**59,597**	**162,015**
Percent Distribution	20%	22%	21%	37%	100%
Unlicensed Supply					
Family, Friends, and Neighbors (FFNs) (3)	1,024	1,228	841	1,123	**4,216**
Total # of ECE Spaces incl. FFN	**34,131**	**36,677**	**34,703**	**60,721**	**166,232**
Percent Distribution	21%	22%	21%	37%	100%

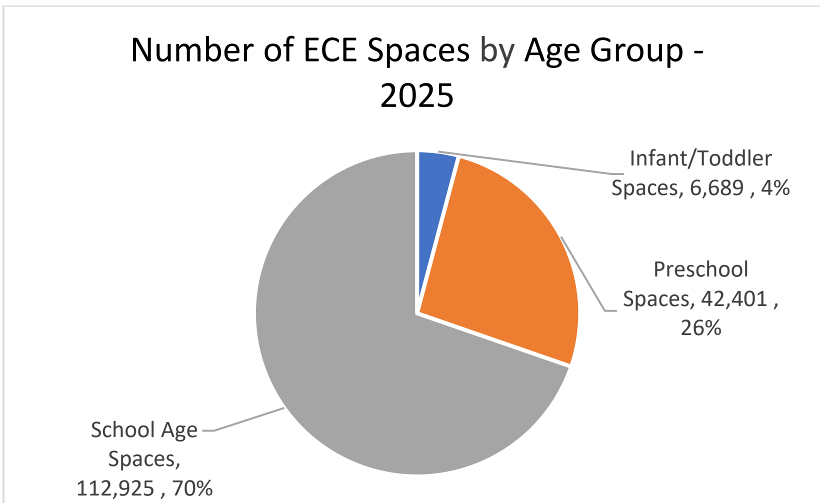
(1) These numbers only include children subsidized by Alternative Payment vouchers.
(2) See Table II-10. These numbers only include spaces estimated for students from Kindergarten to Grade 6. These programs are also assumed to provide wrap-around care for children in TK. A separate analysis of TK and wrap-around care is in Table II-13.
(3) Since FFN are unlicensed, the exact age of children served is unknown.
Sources:
California Department of Social Services - Community Licensing; California Department of Education - DataQuest; Riverside County Resource & Referral Agency; Brion Economics, Inc.

Supply by Age Group

Table II-12 summarizes the spaces by age group by region. The breakdown of all ECE spaces by age group is as follows:[45]

- 6,689 serve Infants/Toddlers or 4% of the total supply;
- 42,401 serve Preschool children or 26% of the total supply; and
- 112,925 serve School Age children or 70% of the total supply.

Exhibit II-3



Overall ECE Demand

Many ECE studies, such as the State Resource and Referral Agency in their county profiles, use the estimate of children with working parents based on LFPRs discussed above (see **Table II-4**) as the "demand" estimate for the need for ECE. This may overstate the need for licensed care, as some families use relatives, friends, nannies, etc., rather than licensed or license-exempt center-based care. This is particularly true for Infants/Toddlers. As children get older, i.e., 10 and older, they begin to participate in more formal after-school activities, including sports, music, art, and other extracurricular activities, and do not use formal after-school care. For this reason, an additional demand factor for licensed care is applied to the estimate of children with working parents, at the following rates:

[45] FFNs serve an additional 4,216 children of unknown age, not included in the figures above. The exact age of these children is not known, and they are, therefore, not included in the total numbers above.

- 37% of Infants/Toddlers with working parents
- 100% of Preschool children with working parents
- 75% of School Age children with working parents

These factors are based on various surveys of parental use of ECE conducted as part of other counties' Needs Assessments by BEI and a literature review of other counties' Needs Assessments over the last 20 years, and whether counties have a "preschool for all" approach to preschool-age care; these factors represent averages.[46]

Table II-12 summarizes the countywide demand for ECE spaces by age group in Riverside County as of 2025. Currently, there are an estimated 411,440 children 0 to 12 years old in Riverside County. About 15% of these children are located in the Eastern Region, 20% in the Mid Region, 28% in the Southwestern Region, and 37% in the Western Region. Of these, 269,279 children countywide, or 65.4%, live in families where both parents or a single parent are in the labor force. The LFPR rates vary slightly by region and age group (see **Table II-4** and **Appendix A Table A-7)**.

Accounting for parents' use of licensed care, there are an estimated 16,958 Infants/Toddlers, 46,062 Preschool children, and 133,038 School Age children who need a licensed/license-exempt ECE space, comprising a total of 196,058 children, 0 to 12 years old, countywide. In terms of the supply of ECE spaces, a total of 162,015 licensed and center- or school-based license-exempt ECE spaces are currently available as of 2025, of which 4% serve Infants/Toddlers, 26% serve Preschool children, and 70% serve School Age children, countywide. These figures vary by region, as shown in **Table II-12**.

Currently, there is a shortage of spaces of 17% of demand, for all age groups, countywide. There are significant differences between the age groups, with 61% of the demand for Infant/Toddler spaces <u>not</u> being met. Preschool supply and demand are in general balance, with a slight shortage of 8% for Preschool spaces. For School Age children, 15% of demand is currently unmet.

These factors vary by region, as shown in **Table II-12**. There is a slight surplus of 1,000 Preschool and 1,247 School Age spaces in the Eastern Region. In the Southwestern Region, there is a surplus of 477 Preschool spaces and in the Mid Region a surplus of 551 School Age spaces. The shortage of Infant/Toddler care is greatest in the Western Region at 72% of demand. The shortage of School Age care is greatest in the Southwestern Region.

Overall, there is a shortage of 34,043 ECE spaces in the County. The shortage by age group includes: 10,269 Infant/Toddler spaces; 3,661 Preschool spaces, and 20,113 School Age spaces.

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[46] These factors were reviewed and approved by the Needs Assessment Committee during the preparation of the study.

Exhibit II-4

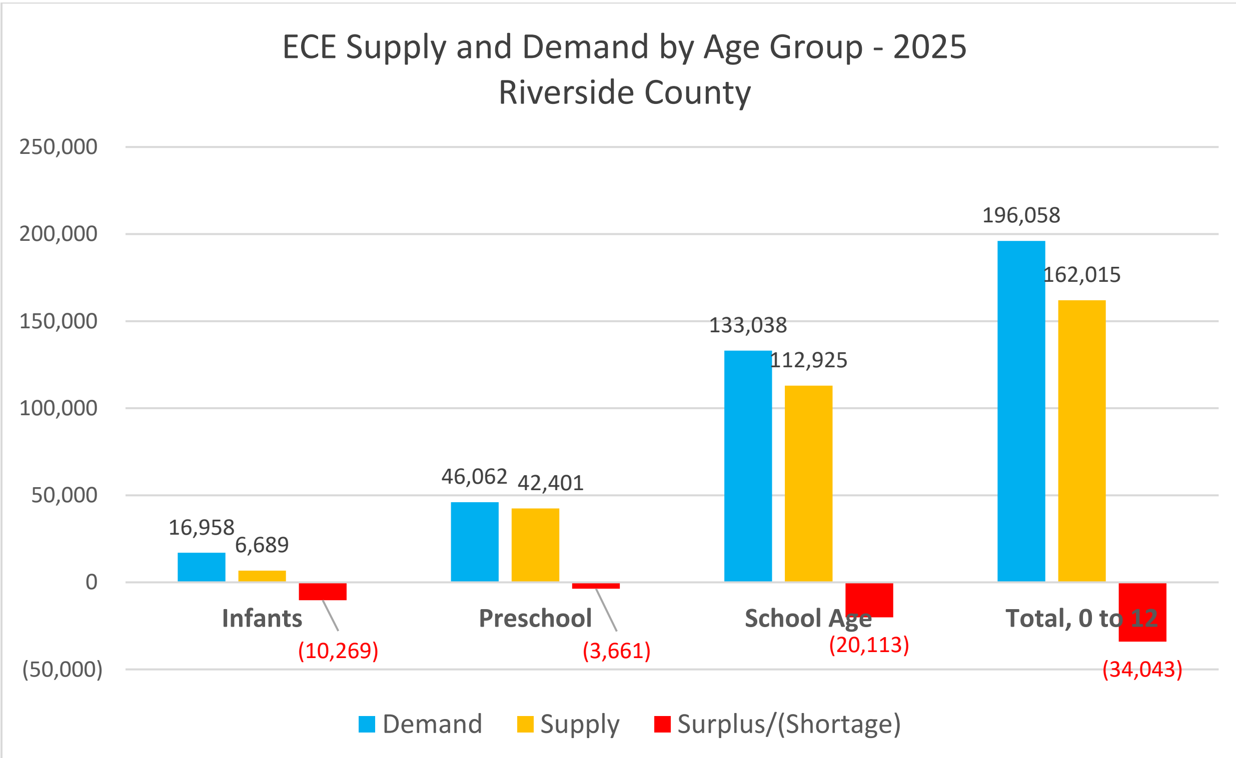

ECE Supply and Demand by Age Group - 2025
Riverside County
250,000
200,000
150,000
100,000
50,000
0
(50,000)
16,958
6,689
(10,269)
46,062
42,401
(3,661)
133,038
112,925
(20,113)
196,058
162,015
(34,043)
Infants
Preschool
School Age
Total, 0 to 12
Demand
Supply
Surplus/(Shortage)

Table II-12
Supply and Demand for ECE Spaces by Age Group by Region and Countywide - 2025
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
ECE Demand					
Total Population of Children (1)					
Infants/Toddlers	10,903	14,153	19,246	26,183	**70,484**
Preschool	10,058	14,176	20,473	26,330	**71,037**
School Age	40,757	54,351	76,466	98,345	**269,918**
Total Children 0 to 12 Years	**61,717**	**82,680**	**116,184**	**150,858**	**411,440**
Percent Distribution	15%	20%	28%	37%	100%
Total Children of Working Parents (2)					
Infants/Toddlers	7,813	8,500	10,781	18,739	**45,833**
Preschool	7,208	8,498	11,475	18,881	**46,062**
School Age	29,450	34,279	48,255	65,401	**177,385**
Total Children of Working Parents	**44,471**	**51,277**	**70,512**	**103,020**	**269,279**
Percent Distribution	17%	19%	26%	38%	100%
Total Demand for Licensed Spaces (3)					
Infants/Toddlers	2,891	3,145	3,989	6,933	**16,958**
Preschool	7,208	8,498	11,475	18,881	**46,062**
School Age	22,087	25,709	36,191	49,051	**133,038**
Total Demand for Licensed Spaces	**32,186**	**37,352**	**51,656**	**74,865**	**196,058**
Percent Distribution	16%	19%	26%	38%	100%
ECE Supply (4)					
Infants/Toddlers	1,565	1,378	1,805	1,941	**6,689**
Preschool	8,208	7,811	11,952	14,430	**42,401**
School Age	23,334	26,260	20,105	43,226	**112,925**
Total ECE Spaces	**33,107**	**35,449**	**33,862**	**59,597**	**162,015**
Percent Distribution	20%	22%	21%	37%	100%
ECE Surplus or (Shortage)					
Infants/Toddlers	(1,326)	(1,767)	(2,184)	(4,992)	**(10,269)**
Preschool	1,000	(687)	477	(4,451)	**(3,661)**
School Age	1,247	551	(16,087)	(5,825)	**(20,113)**
Total for Children 0 to 12 Years	**921**	**(1,903)**	**(17,794)**	**(15,268)**	**(34,043)**
Percent Distribution	-3%	6%	52%	45%	100%
% of Demand NOT Met as of 2025					
Infants/Toddlers	46%	56%	55%	72%	**61%**
Preschool	-14%	8%	-4%	24%	**8%**
School Age	-6%	-2%	44%	12%	**15%**
Total for Children 0 to 12 Years	**-3%**	**5%**	**34%**	**20%**	**17%**

(1) See Table II-4.

(2) See Table II-4 for the detailed calculation and Labor Force Participation Rates per age group per region.

(3) This is calculated by applying a demand factor for licensed care to each age group. The following demand factors are used: 37% for Infants/Toddlers, 100% for Preschool, and 75% for School Age.

(4) See Tables II-8 to II-11 for more details. This includes spaces from licensed and license-exempt settings. License-exempt supply includes Transitional Kindergarten and after-school programs offered by school districts and other center-based license-exempt supply. The license-exempt center-based spaces only include children subsidized by Alternative Payment vouchers. It excludes care provided by Family, Friends, and Neighbors as no exact information on the ages of the children served could be obtained.

Sources: US Census; SCAG Projections 2020-2035; AIR-ELNAT; CDSS; CDE; Riverside COE; Brion Economics, Inc.

Supply and Demand for TK Wrap-Around Care

With the advent of TK serving many 4-year-olds in the County with free part-day care, the need for traditional Preschool spaces is changing. **Table II-13** summarizes the estimate of children in TK, compared to the availability of after-school spaces serving TK children by region. As shown, there are 13,658 4-year-olds countywide who are eligible for TK and have working parents. Currently, there are 10,061 4-year-olds in TK countywide. Of these, 6,461 are assumed to have working parents.

The supply of after-school spaces serving these children is estimated at 4,661 spaces countywide (see **Table II-13**). Overall, there is a shortage of 1,801 after-school spaces for TK-age children with working parents. These figures and the shortages vary by region, as shown below. Overall, the County is currently meeting about 72% of the need for after-school care for TK children, although this figure varies by region.

Table II-13
Supply and Demand for TK Wrap-Around Spaces by Region and Countywide - 2025
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
TK Demand					
Total 4-Year-Olds	4,025	6,069	8,209	9,781	**28,084**
% of 4-Year-Olds Eligible for TK - 24/25 (1)	75%	75%	75%	75%	**75%**
# of 4-Year-Olds Eligible for TK	3,019	4,552	6,157	7,336	**21,063**
Labor Force Participation Rate	72%	60%	56%	72%	**65%**
4-Year-Olds Eligible for TK w Working Parents	2,163	2,728	3,451	5,260	**13,658**
TK Supply					
4-Year-Olds Enrolled in TK (2)	1,623	2,207	3,147	3,084	**10,061**
% of all 4-Year-Olds	40%	36%	38%	32%	**36%**
% of all Eligible 4-Year-Olds	54%	48%	51%	42%	**48%**
% of Eligible 4-Year-Olds w Working Parents	75%	81%	91%	59%	**74%**
Supply & Demand for TK Wrap-Around Care					
Demand - 4-Year-Olds in TK w Working Parents (3)	1,163	1,323	1,764	2,211	**6,461**
Supply - License-Exempt Wrap-Around Care for TK (4)	815	1,142	902	1,802	**4,661**
Surplus / Shortage of TK Wrap-Around Care	**(348)**	**(181)**	**(862)**	**(410)**	**(1,801)**
% of Demand for Wrap-Around Care Met by Schools	70%	86%	51%	81%	72%

(1) In the school year 2024/25, all children born between Sep 2, 2019 to June 2, 2020 were eligible for Transitional Kindergarten.

(2) As shown in Table II-10, there were also 1,873 5-year-olds enrolled in TK in 24/25. These have been excluded from this analysis as 5-year-olds fall under the School Age category for this study.

(3) This is calculated by applying a Labor Force Participation Rates to the number of 4-year-olds currently enrolled in TK.

(4) See Table II-10 for more details. This is an estimate of wrap-around care spaces provided by schools funded by the ELO-P, ASES and 21st century programs. This excludes care provided by Family, Friends, and Neighbors and other center-based license-exempt providers as no exact information on the ages of the children served could be obtained.

Sources: US Census; SCAG Projections 2020-2035; AIR-ELNAT; CDSS; CDE; Riverside COE; Brion Economics, Inc.

While TK has many benefits in the County for both children and parents, it is causing much concern amongst private providers in the County.

"Frustrated by not knowing what is going to happen to our business when we have schools taking our young kids and not knowing what's going to happen with our small businesses."
Survey Respondent Comment

Appendix B includes detailed tables summarizing ECE supply and demand by region, and the County as a whole, for 2025 and 2030, including footnotes and assumptions. It also includes more detailed estimates of supply by type of provider and age group.

The following exhibits summarize the supply and demand by region for 2025.

Exhibit II-5

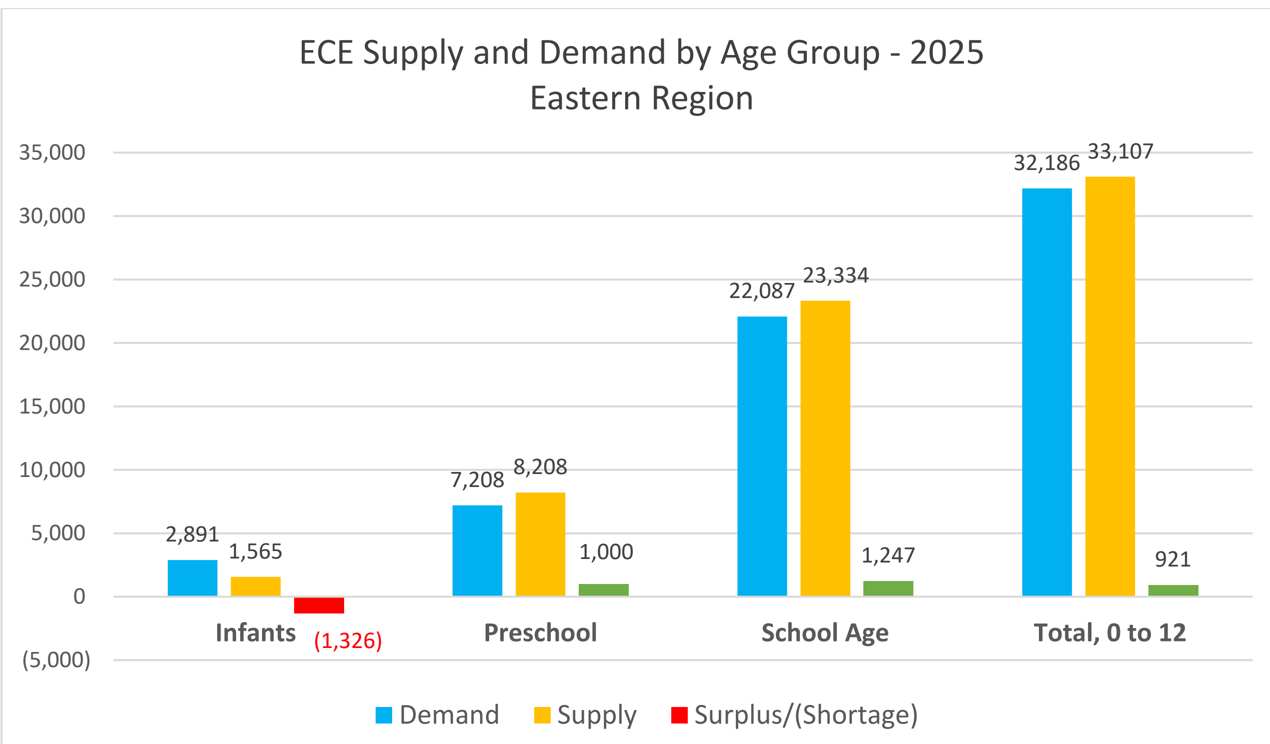


Exhibit II-6

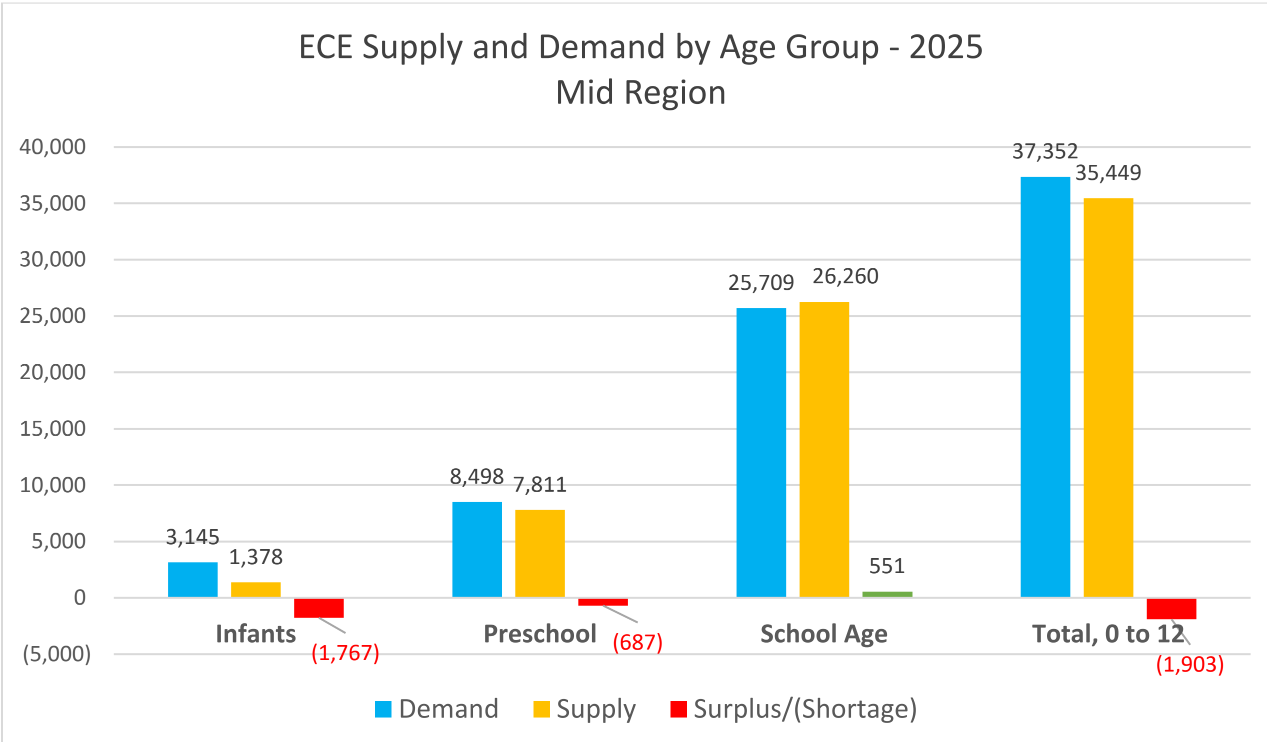


Exhibit II-7

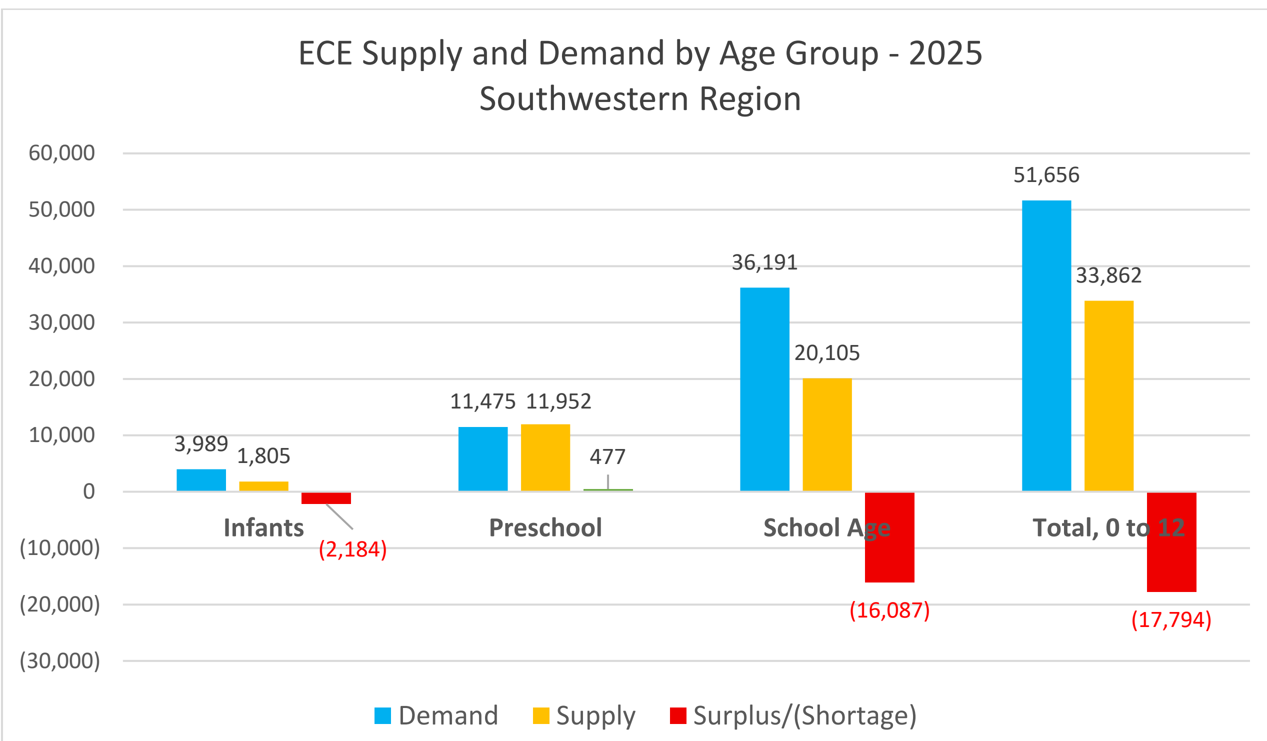
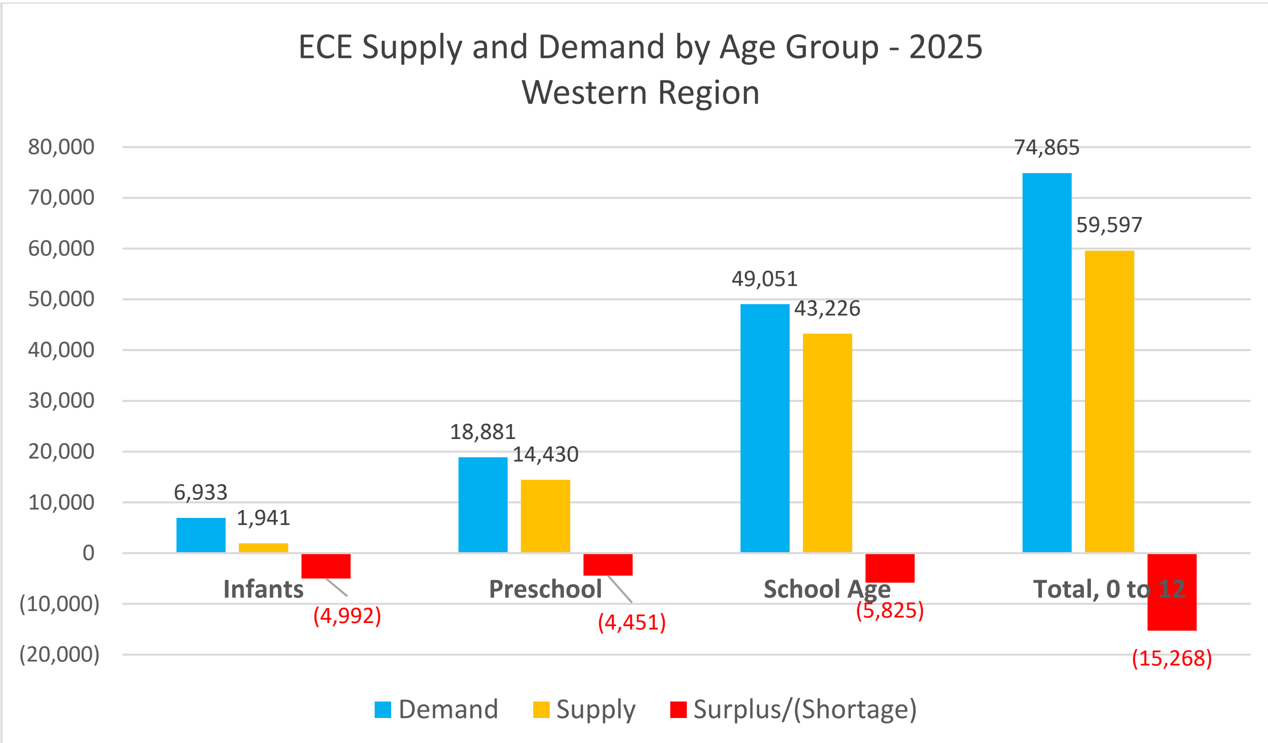


Exhibit II-8



Supply and Demand at 2030

This section estimates new supply of ECE spaces by region, compared to estimates of ECE demand at 2030.

Table II-14 summarizes new expected supply of ECE spaces by age group and region, based on "pending licenses" adjusted for any reductions providers want to make, and other planned supply of new ECE facilities collected for this effort. Currently, there are 28 pending licenses being reviewed by Community Care Licensing. Of these, 16 are FCC providers and 12 are center-based providers. In total, there are an estimated 730 total net new spaces associated with pending licenses, of which 91 are associated with FCCs and 730 with center-based providers. There are four new projects planned with a total of 145 Infant/Toddler spaces as well, bringing the total new spaces to 966. The age group of 717 of these spaces is unknown at this time. This represents a 0.6% increase in overall supply as of 2025.

Table II-14a estimates the number of 4-year-olds expected to be in TK by region by 2030. This analysis assumes a 30% increase in the number of eligible 4-year-olds participating in TK by 2030 over 2025 conditions. By 2030, 62% of 4-year-olds are expected to attend TK at local public and charter schools, whereas currently that figure is 48%. The 2030 analysis also assumes that some 4-year-olds will turn 5 while in TK, consistent with 2025 ratios, as shown.

Table II-14
Estimated New ECE Supply by Region and Countywide - 2025 to 2030
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Number of Pending Licenses (1)					
Family Child Care (FCC) Providers					
Large FCCs - 9 Spaces	-	-	-	1	**1**
Large FCCs - 14 Spaces	4	6	4	1	**15**
Subtotal FCC Providers	**4**	**6**	**4**	**2**	**16**
Licensed ECE Centers	5	1	3	3	**12**
Total # of Pending Licenses	**9**	**7**	**7**	**5**	**28**
Pending Licenses - ECE Spaces by Age Group (1)					
FCC - Additional Spaces (2)					
Infants/Toddlers	4	6	4	1	**15**
Preschool	8	12	8	3	**31**
School Age	12	18	12	3	**45**
Subtotals	**24**	**36**	**24**	**7**	**91**
Licensed ECE Center Spaces					
Infants/Toddlers	12	-	-	-	**12**
Preschool (3)	45	-	-	(44)	**1**
School Age	-	-	-	-	**-**
Unknown Age Group (4)	205	24	318	170	**717**
Subtotals	**262**	**24**	**318**	**126**	**730**
Planned New ECE Center - Spaces (5)					
Infants/Toddlers	48	24	73	-	**145**
Total # of Future ECE Spaces					
Infants/Toddlers	64	30	77	1	**172**
Preschool (3)	53	12	8	(41)	**32**
School Age	12	18	12	3	**45**
Unknown Age Group (4)	205	24	318	170	**717**
Total # of Future ECE Spaces	**334**	**84**	**415**	**133**	**966**

(1) This information is based on pending licenses reported by Community Care Licensing.
(2) This is based on the following assumptions:
- Pending licenses are from small FCCs with 8 children expanding to a license of 9 or 14 children, thus adding 1 or 6 additional ECE spaces.
- For the Large FCC with 9 children, 1 additional ECE Preschool space will be added.
- For the Large FCCs with 14 spaces, additional spaces are 1 Infants/Toddlers, 2 Preschool-age children, 3 School Age children.

(3) One provider plans to update their license and reduce their capacity by 44 children.
(4) With the new Single License system, capacities by age group are often not available in the licensing database until the facility has been
(5) According to information from First 5 Riverside County, ARPA grants with Prop 10/DIF/CDI matches were allocated in 2022 for the construction of four new ECE centers:
Lakeland Village Child Care in Lake Elsinore (25 spaces for children ages 0-3);
French Valley Child Care in Winchester (48 spaces for children ages 0-3);
Jan Peterson in Moreno Valley (24 spaces for children ages 0-3);
Desert Rose in Ripley (48 spaces for children ages 0-3).

Sources:
California Department of Social Services - Community Licensing; First 5 Riverside County; Brion Economics, Inc.

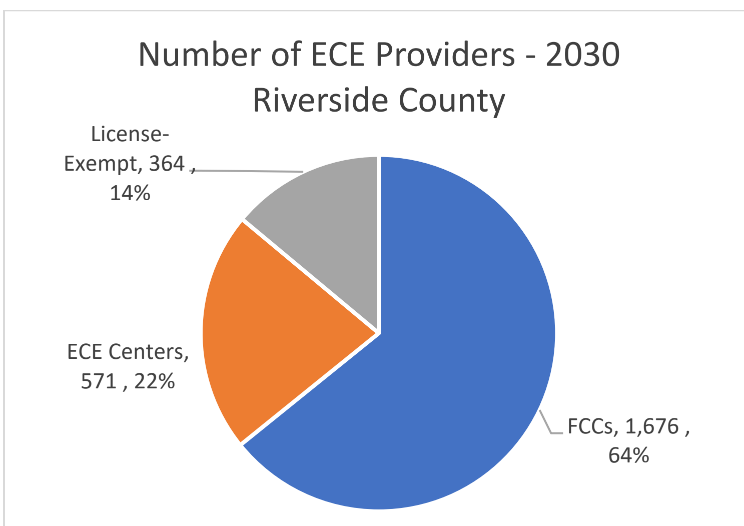
Table II-14a
Estimates of TK-Age Children by Region and Countywide - 2030
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Future TK Demand					
Total 4-Year-Olds (1)	4,201	6,117	8,287	9,868	**28,472**
% of 4-Year-Olds Eligible for TK - 2030 (2)	100%	100%	100%	100%	**100%**
Labor Force Participation Rate	72%	60%	56%	72%	**65%**
4-Year-Olds Elibigle for TK w Working Parents	3,015	3,666	4,649	7,080	**18,483**
Future TK Supply					
% of all Eligible 4-Year-Olds Enrolled in TK in 2030 (3)	70%	63%	66%	55%	**62%**
Estimated # of 4-Year-Olds in TK	2,936	3,855	5,507	5,393	**17,691**
Estimated # of 5-Year-Olds in TK (4)	582	735	954	1,023	**3,295**
Estimated Future Enrollment in TK	**3,518**	**4,591**	**6,461**	**6,416**	**20,986**

(1) Based on projections of growth in children in Appendix Table A-9.
(2) By 2030, all 4-year-olds will be eligible for Transitional Kindergarten.
(3) See Table II-13. For estimating the enrollment in TK in 2030, it is assumed that the percentage of eligible children will increase by 30% over 2025 conditions.
(4) Estimate of 4-year-olds that turn 5 in TK assuming the same ratio of 4- to 5-year-olds as in 2025.
Sources: US Census; SCAG Projections 2020-2035; AIR-ELNAT; CDSS; CDE; Riverside COE; Brion Economics, Inc.

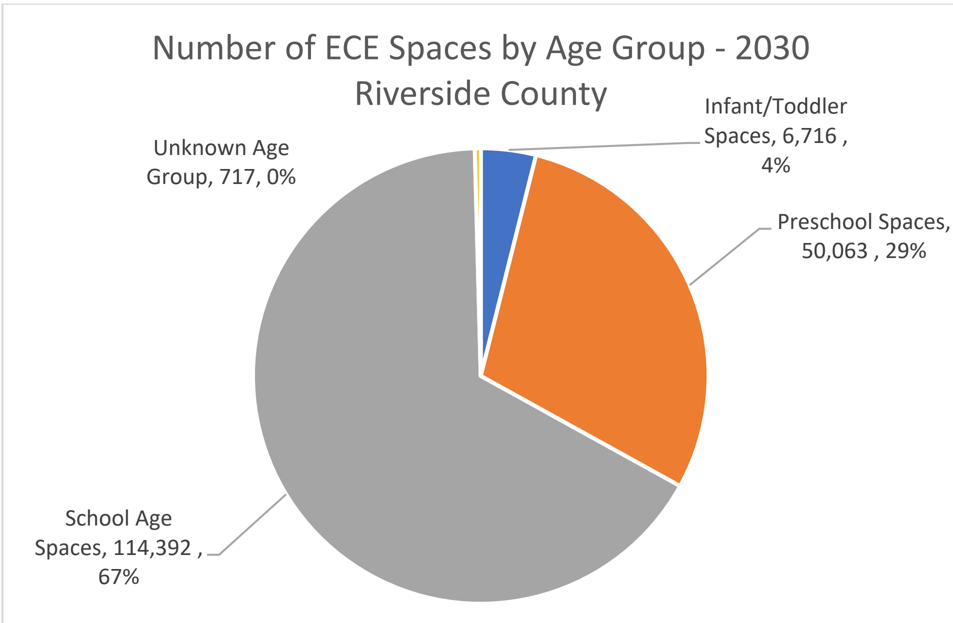
Table II-15 summarizes the total number of ECE providers expected by 2030 by region and type of provider. As shown below **in Exhibit II-9**, there is an estimated total of 2,611 providers in 2030. This represents a 0.6% increase in the number of providers in the County.

Exhibit II-9



The estimated supply of ECE spaces by region and age group by 2030 is shown in **Table II-16** and **Exhibit II-10**. The analysis assumes the same level of existing supply as in 2025, combined with pending licenses and planned facilities discussed above. By 2030, there will be 171,888 ECE spaces in the County, of which 717 spaces are not defined by age group. For this reason, these spaces are excluded from the supply and demand analysis. The distribution of supply of ECE spaces by region and type of provider is also shown in **Table II-16**.

Exhibit II-10



By 2030, there will be 7% fewer children ages 0 to 12 in the County. This will reduce the demand for ECE spaces by 2030, and with the expected increase in supply, the overall unmet need will be slightly less in 2030 over current conditions. **Table II-17** and **Exhibit II-11** summarize the supply and demand for ECE spaces by 2030. By 2030, there will be an estimated shortfall of 10,195 Infant/Toddler spaces or an unmet need of 60%. There is an expected surplus of Preschool spaces of 4,052 by 2030 due to the decrease in children combined with the increase in children attending TK, as discussed above. For School Age care, there is an expected shortfall of 4,766 spaces by 2030 or an unmet demand of 4%. Overall, there is a shortage of about 10,909 spaces countywide.[47] However, the shortages and surpluses vary by region and by age group. The Eastern and Mid Regions are both expected to have surplus spaces overall, but all four regions will continue to have a shortage of Infant/Toddler care. It should be noted that a surplus in one age group cannot meet the needs of the other age groups.

[47] Including the 717 spaces for an unknown age group, the shortage of ECE spaces for all age groups will be 10,192.

Table II-15
Estimated ECE Providers by Region - 2030
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Family Child Care (FCC) Providers					
Small FCCs - 6 Spaces	6	2	3	5	**16**
Small FCCs - 8 Spaces	188	208	247	185	**828**
Large FCCs - 9 Spaces	-	-	-	1	**1**
Large FCCs - 12 Spaces	2	8	1	-	**11**
Large FCCs - 14 Spaces	260	175	199	186	**820**
Subtotal FCC Providers	**456**	**393**	**450**	**377**	**1,676**
Licensed Providers					
Licensed ECE Centers	126	85	135	225	**571**
License-Exempt Providers (1)					
License-Exempt Center-Based Providers (2)	3	2	44	3	**52**
Transitional Kindergarten (3)	61	54	80	98	**293**
After-School Programs at Charter Schools (4)	4	5	7	3	**19**
Subtotal License-Exempt Providers	**68**	**61**	**131**	**104**	**364**
Total # of Providers	**650**	**539**	**716**	**706**	**2,611**

(1) This excludes after-school programs at public school sites. For this purpose, it is assumed that the same number of providers will be operating in 2030 as in 2025.

(2) These are only providers serving children via the voucher programs. No exact data on all license-exempt center-based providers is available from the local Resource and Referral Agency.

(3) This is the number of school sites, public and charter schools, with TK programs in the County. For this purpose it is assumed that this number will stay the same.

(4) Number of after-school programs at charter schools is assumed to remain the same in 2030 as in 2025.

Sources:
California Department of Social Services - Community Licensing; California Department of Education - DataQuest; Riverside County Resource & Referral Agency; First 5 Riverside County; Brion Economics, Inc.

Table II-16
Estimated ECE Spaces by Region, Provider Type, and Age Group - 2030
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	County Total
Family Child Care (FCC) - Spaces					
Infants/Toddlers	1,176	977	1,101	940	**4,194**
Preschool	1,884	1,535	1,746	1,499	**6,664**
School Age	2,144	1,710	1,945	1,684	**7,483**
Subtotals	**5,204**	**4,222**	**4,792**	**4,123**	**18,341**
Percent Distribution	28%	23%	26%	22%	100%
Licensed ECE Centers - Spaces					
Infants/Toddlers	405	407	707	1,002	**2,521**
Preschool	4,754	4,081	7,063	9,806	**25,704**
School Age	978	334	826	1,965	**4,103**
Unknown Age Group (1)	205	24	318	170	**717**
Subtotals	**6,342**	**4,846**	**8,914**	**12,943**	**33,045**
Percent Distribution	19%	15%	27%	39%	100%
License-Exempt Spaces					
Center-Based License-Exempt Spaces (2)					
Infants/Toddlers	-	-	1	-	**1**
Preschool	-	-	4	-	**4**
School Age	16	20	286	73	**395**
Subtotals	**16**	**20**	**291**	**73**	**400**
Percent Distribution	4%	5%	73%	18%	100%
Before- and After-School Programs Provided by Schools (3)					
School Age	19,886	23,793	16,515	38,922	**99,116**
Percent Distribution	20%	24%	17%	39%	100%
Transitional Kindergarten (4)					
4-Year-Olds	2,936	3,855	5,507	5,393	**17,691**
5-Year-Olds	582	735	954	1,023	**3,295**
Subtotals	**3,518**	**4,591**	**6,461**	**6,416**	**20,986**
Percent Distribution	17%	22%	31%	31%	100%
Total # of ECE Spaces					
Infants/Toddlers	1,581	1,384	1,809	1,942	**6,716**
Preschool	9,574	9,471	14,320	16,698	**50,063**
School Age	23,607	26,593	20,525	43,667	**114,392**
Unknown Age Group (1)	205	24	318	170	**717**
Total # of ECE Spaces	**34,967**	**37,472**	**36,972**	**62,477**	**171,888**
Percent Distribution	20%	22%	22%	36%	100%

(1) With the new Single License system, capacities by age group are often not available in the licensing database until the facility has been successfully licensed.

(2) See Table II-11. For this purpose, it is assumes that the number of ECE spaces provided by license-exempt center-based providers remain the same in 2030 as in 2025. Please note that this number only includes children subsidized by Alternative Payment vouchers.

(3) See Table II-10. These numbers only include spaces estimated for students from Kindergarten to Grade 6. For this purpose, it is assumed that the number of students served by after-school programs will remain the same in 2030 as in 2025.

(4) See Table II-14a.

Sources:

California Department of Social Services - Community Licensing; California Department of Education - DataQuest; Riverside County Resource & Referral Agency; First 5 Riverside County; Brion Economics, Inc.

Table II-17
Future Supply and Demand for ECE Spaces by Age Group by Region and Countywide - 2030
Riverside County Needs Assessment - 2025

Item	Eastern	Mid Region	Southwestern	Western	Total
Future ECE Demand					
Total Population of Children (1)					
Infants/Toddlers	11,161	14,001	19,097	25,953	70,212
Preschool	10,323	14,063	20,345	26,147	70,879
School Age	37,544	48,401	68,178	87,676	241,800
Total Children 0 to 12 Years	**59,028**	**76,465**	**107,620**	**139,777**	**382,890**
Percent Distribution					
Total Children of Working Parents (2)					
Infants/Toddlers	8,006	8,409	10,707	18,584	45,705
Preschool	7,409	8,429	11,413	18,761	46,011
School Age	27,080	30,537	43,012	58,247	158,876
Total Children of Working Parents	**42,495**	**47,375**	**65,132**	**95,591**	**250,593**
Total Demand for Licensed Spaces (3)					
Infants/Toddlers	2,962	3,111	3,962	6,876	16,911
Preschool	7,409	8,429	11,413	18,761	46,011
School Age	20,310	22,903	32,259	43,685	119,157
Total Demand for Licensed Spaces	**30,681**	**34,443**	**47,634**	**69,322**	**182,080**
Future ECE Supply (4)					
Infants/Toddlers	1,581	1,384	1,809	1,942	6,716
Preschool	9,574	9,471	14,320	16,698	50,063
School Age	23,607	26,593	20,525	43,667	114,392
Total ECE Spaces	**34,762**	**37,448**	**36,654**	**62,307**	**171,171**
ECE Surplus or (Shortage)					
Infants/Toddlers	(1,381)	(1,727)	(2,153)	(4,934)	(10,195)
Preschool	2,165	1,042	2,907	(2,063)	4,052
School Age	3,296	3,690	(11,734)	(18)	(4,766)
Total for Children 0 to 12 Years	**4,080**	**3,005**	**(10,979)**	**(7,015)**	**(10,909)**
% of Demand NOT Met as of 2030 (5)					
Infants/Toddlers	47%	56%	54%	72%	60%
Preschool	-29%	-12%	-25%	11%	-9%
School Age	-16%	-16%	36%	0%	4%
Total for Children 0 to 12 Years	**-13%**	**-9%**	**23%**	**10%**	**6%**

(1) See Table II-5.
(2) See Table II-5 for the detailed calculation and Labor Force Participation Rates per age group per region.
(3) This is calculated by applying a demand factor for licensed care to estimates of children with working parents by each age group. The following demand factors are used: 37% for Infants/Toddlers, 100% for Preschool, and 75% for School Age.
(4) See Tables II-14 to Table II-16 for more details. This includes spaces from licensed and license-exempt settings. License-exempt supply includes Transitional Kindergarten and after-school programs offered by school districts. It excludes care provided by Family, Friends, and Neighbors as no exact information on the ages of the children served could be obtained.
As shown in Table II-14, there are an additional 1,116 planned spaces in the County the age group of which is not known at the time this data was compiled. For this reason, these spaces are excluded from these supply and demand tables.
(5) Note that negative percentages in this section represent a percent of surplus over demand.
Sources: US Census; SCAG Projections 2020-2035; AIR-ELNAT; CDSS; CDE; Riverside COE; First 5 Riverside County; Brion Economics, Inc.

The following exhibits summarize the supply and demand for ECE spaces by region and age group for 2030.

Exhibit II-11

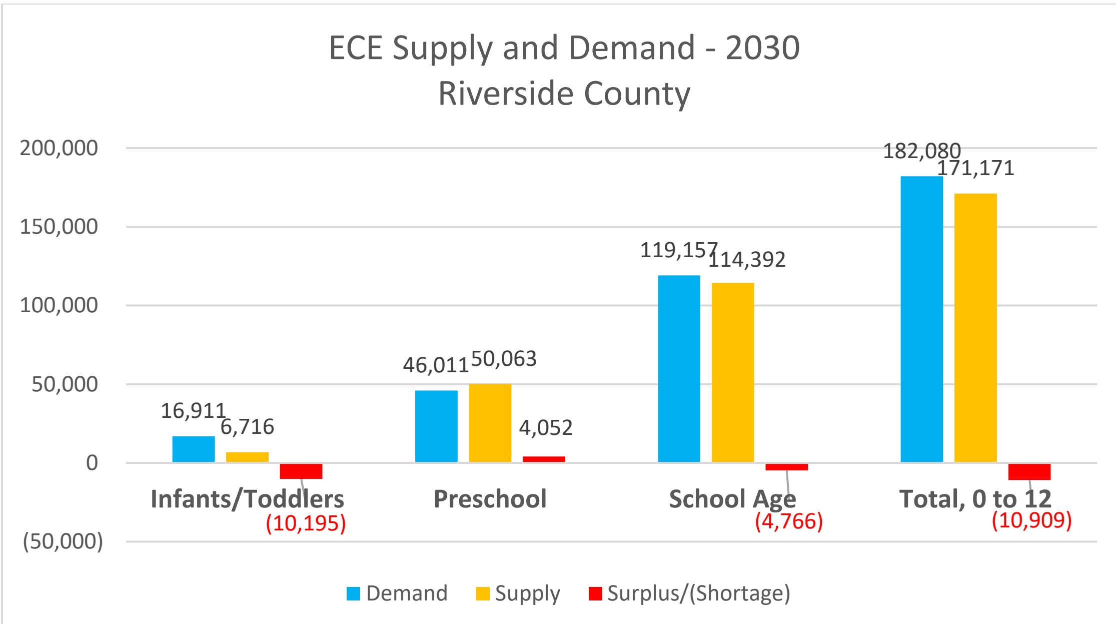


Exhibit II-12

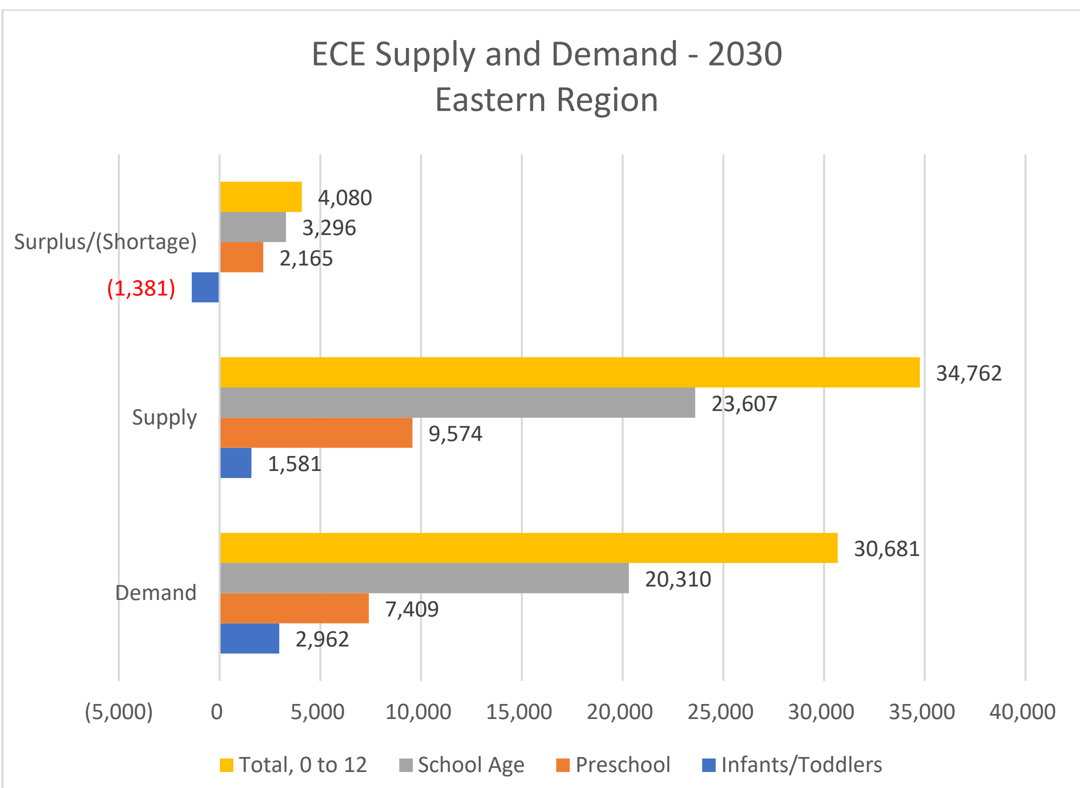


Exhibit II-13

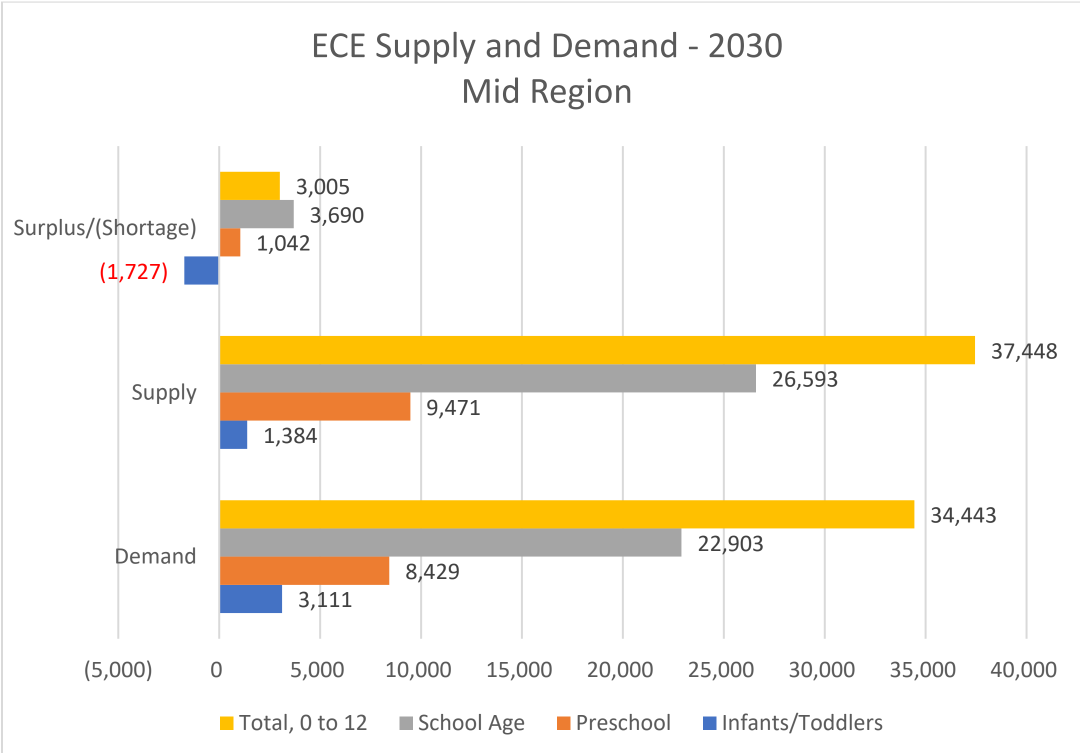


Exhibit II-14

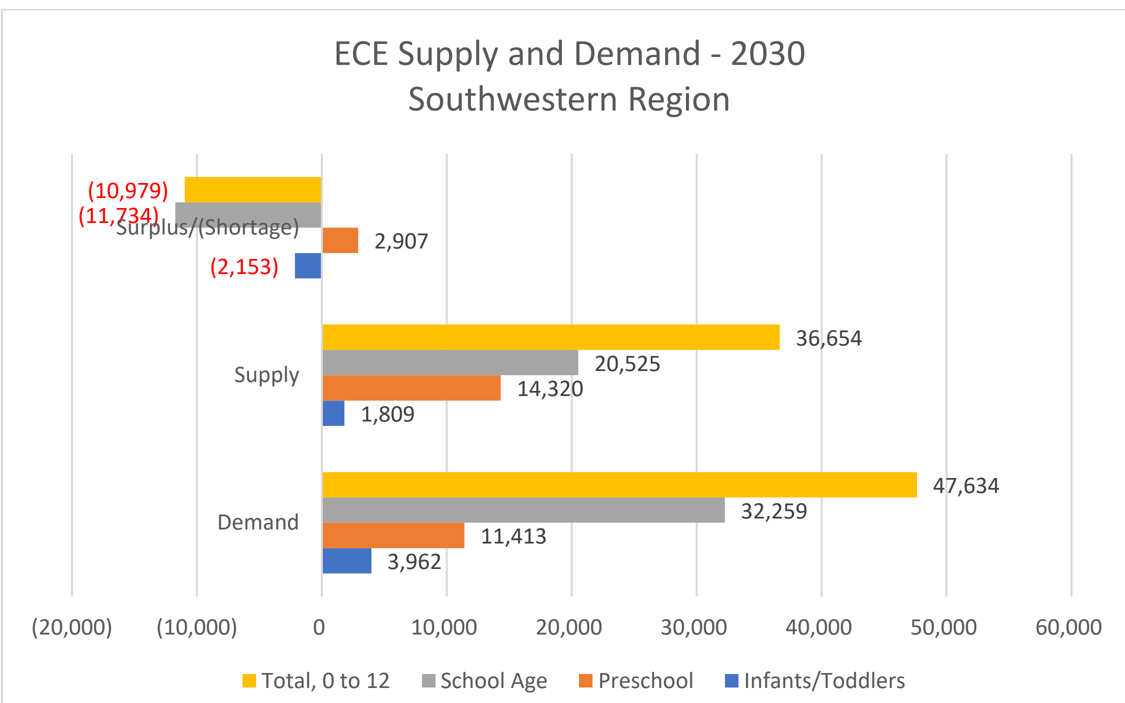
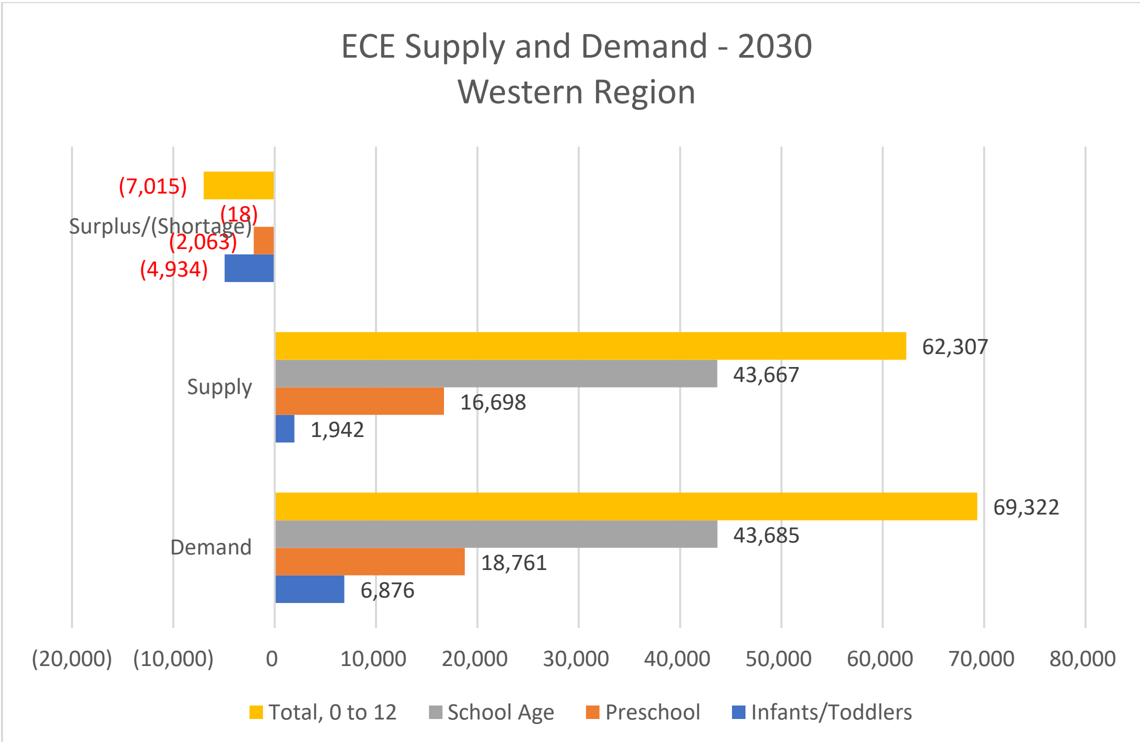


Exhibit II-15



III. ECE Online Survey Results

This chapter presents an analysis of the results from the Riverside ECE Online Survey, which was conducted as part of this effort. The survey instrument in **Appendix C** and the full survey results can be found in **Appendix D**.[48] Several questions from the survey related to the needs assessment topics are summarized as part of **Chapter IV**.

An online survey of ECE providers and other stakeholders in the sector in Riverside County was conducted to gather data to inform the Needs Assessment and the updated Strategic Plan for Riverside County's LPC. The survey was held online via SurveyMonkey. The survey questions were translated into Spanish, and skip logic was used to direct questions to specific respondent groups. The survey was open to responses from May 27 to June 22, 2025. During this time, three email reminders were sent to all contacts after the initial invitation to participate in the survey. **Table III-1** summarizes the number of contacts collected and the number of contacts reached by type of contact. A total of 2,975 contacts were reached, or about 98%.

Table III-1
Number of ECE Survey Contacts by Type
Riverside County Needs Assessment - 2025

Type of Contact	# of Contacts	Bounced Contacts	Reached Contacts
Local Elected Officials and City & County Staff	114	2	112
Higher Education Institutions focused on ECE	21	-	21
Large Employers and Local Businesses in County	61	2	59
ECE Providers			
CELS List	2,138	-	2,138
CalWorks Stage 1 Providers	590	43	547
Agencies and Nonprofit Staff	16	1	15
Local Planning Council Listserv	20	-	20
CELS Board	37	-	37
Faith-Based Organizations	29	3	26
Total Contacts	**3,026**	**51**	**2,975**

Survey was conducted from May 27 to June 22, 2025.
Source: Brion Economics, Inc.

[48] Quotes from survey respondents' answers to open-ended questions were corrected for typos, misspellings, and slight grammatical errors.

The survey had an overall response rate of 15.9%. Around 13.8% of the surveys were completed in Spanish. The completion rate was at 60%, and respondents took about 14 minutes on average to complete the survey (see **Table III-2**).

Table III-2
2025 Riverside ECE Survey Response Rate
Riverside County Needs Assessment - 2025

Response Rate		**% of Total Responses**
Total Responses	**472**	
Disqualified Responses	-5	1.1%
Empty Responses (1)	-17	3.6%
Nearly Empty Responses (2)	-24	5.1%
Subtotal of Relevant Responses	**426**	**90.3%**
Contacts Reached	2,975	
Response Rate	**15.9%**	
Other Survey Statistics		
Completion Rate	60%	
Responses Submitted in Spanish	65	13.8%
Average Minutes Spent on Survey	14	

(1) Did not answer questions beyond the qualifying question Q1.
(2) Stopped at Q3.
Source: Brion Economics, Inc.

The survey reached about 11% of the ECE center directors, 10.6% of large FCC owners, and 4.2% of small FCC owners. Of the 2,216 known FFN providers in the County, 38, or 1.7%, completed the survey (see **Table III-3**).[49] Due to the lower representation of FFNs and small FCC owners, the results for these populations presented in the following need to be interpreted with caution. At this point, it also seems appropriate to make a general note about the survey results presented. Each exhibit, table, or footnote includes a reference to the number of respondents who answered this particular question (n=value). Respondents skipped certain questions, either due to the employed skip logic, personal preferences, or because they did not complete the entire survey. Details on the number of responses and skipped responses can be found in **Appendix D.** The reported percentages relate to the n value, i.e., the number of respondents who answered this particular question, rather than the entire population surveyed.

[49] Please note that no weighting was applied to survey responses according to this representation. Reported survey results strictly refer to the surveyed population.

Table III-3
Response Rate for Selected Groups
Riverside County Needs Assessment - 2025

Type of Contact	# in County	# of Responses	Response Rate	% of Total Responses
ECE Providers (License and License-Exempt) (1)	2,596	398	15.33%	88.44%
ECE Center Directors (3)	353	39	11.05%	9.15%
Licensed Family Child Care (FCC) Owners (2)	1,676	123	7.34%	28.87%
Small FCCs	860	36	4.19%	8.45%
Large FCCs	816	87	10.66%	20.42%
Family, Friends, and Neighbors (4)	2,216	38	1.71%	8.44%

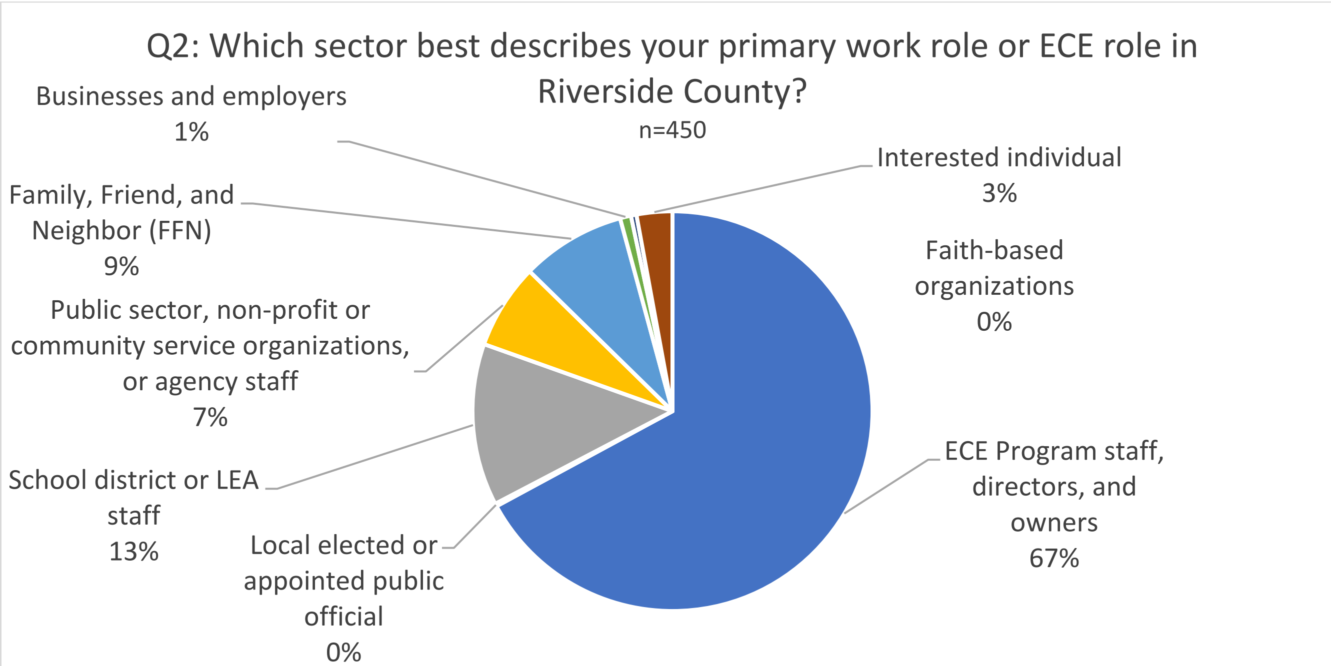
(1) Based on answers to Q3.
(2) Based on answers to Q6 and Q9. Please note that not all respondents filled out the survey to that point, and the response rate might thus be lower.
(3) Based on Q6 and 9. Includes answers to "Private, for-profit", "Head Start", "COE-operated ECE program", "County or city-operated ECE program" and "Faith-based ECE center".
(4) Based on answers to Q2.
Sources: Brion Economics, Inc.

Exhibit III-1 shows the sector of respondents based on the results of the second question. ECE program staff, including FCC staff and owners, as well as ECE center directors, constituted the largest group, at 67%, followed by LEA staff at 13% and FFN at 8%.[50]

Of the respondents, 88% worked in the ECE sector, including licensed, license-exempt care, and FFNs.[51] In general, respondents came from small businesses, employing no staff (15% no staff, 7.5% not applicable), fewer than 10 employees (31% chose 1 to 9 employees), and another 19.5% chose 10 to 49 employees.[52]

[50] The intended goal of reaching the business community was not achieved, as local chambers of commerce or the workforce development boards did not share the survey invitation with their lists as hoped. Further, none of the 112 local officials responded to our survey invitation.
[51] Question 3 (n=450).
[52] Question 5 (n=426).

Exhibit III-1



III.1 ECE Workforce

Type of Program and Position

Exhibit III-2 shows the types of facilities or programs in which respondents work. FCC providers are well represented, with 12% of respondents working at small FCCs and 29% at large FCCs. Respondents working at private for-profit or non-profit ECE centers represented 31%, and 14% worked at Early Head Start or Head Start programs. Respondents working at school district programs represented 13% of respondents.

As **Exhibit III-3** shows, nearly half of the respondents held a lead role in some capacity. About 37% were owners, 7% directors, principals, or main administrators, and another 3% assistant directors, managers, or supervisors.

Of the 126 responses choosing "Owner," 120, or 35% of the responses to this question, were FCC owners. According to answers to Question 7,[53] only 17% of FCC owners are part of a Family Child Care association or network. Answers to the open-ended question asking for the name of the association reveal a certain degree of confusion or lack of awareness of FCC associations or networks. The most commonly mentioned actual FCC network was Red de Provedoras del Valle de Coachella.

[53] Question 7 (n=136).

Exhibit III-2

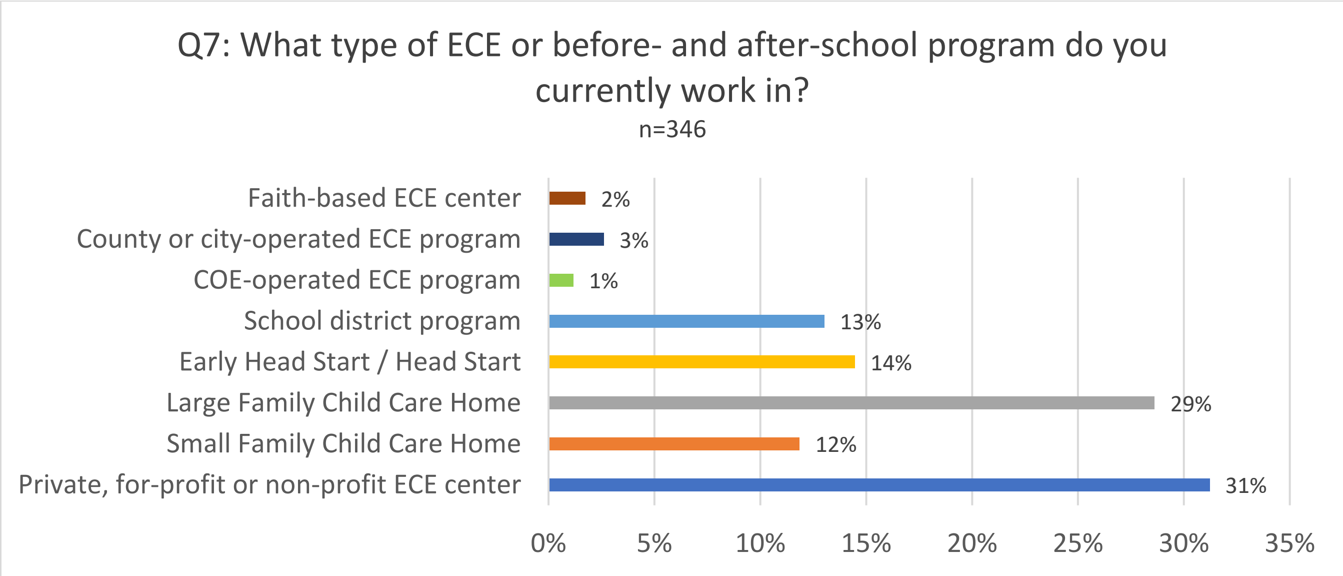
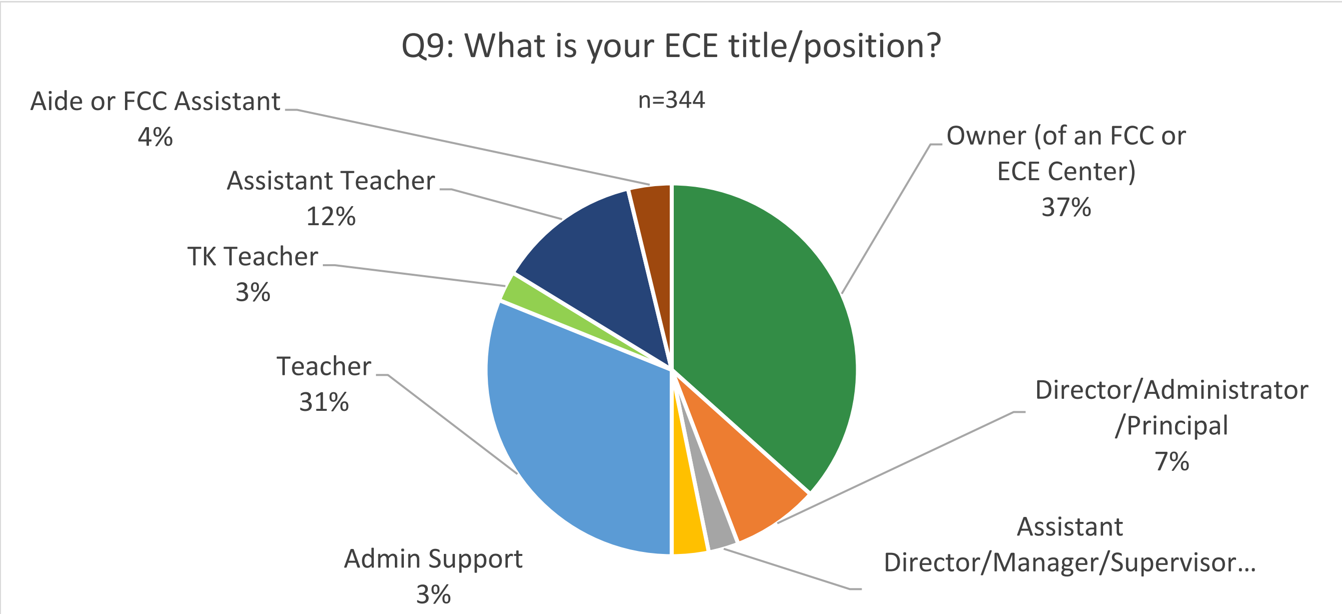


Exhibit III-3



ECE Workforce Demographics

Of all respondents in the ECE workforce, 33% were between 50 and 64 years old, 28% were 40 to 49 years old, and 25% were 30 to 39 years old (see **Exhibit III-4**). Respondents' work experience in ECE shows a relatively even distribution, with 24% having over 20 years of experience, 17% each with 16 to 20 years and 6 to 10 years, and 2 to 5 years. Another 15% had 11 to 15 years of experience working in the ECE field (see **Exhibit III-5**).

Considering the race and ethnicity of the ECE workforce respondents, 65% identified as Latine, Hispanic, or Spanish, followed by 21% as White and 13% as Black or African American.[54]

Exhibit III-4

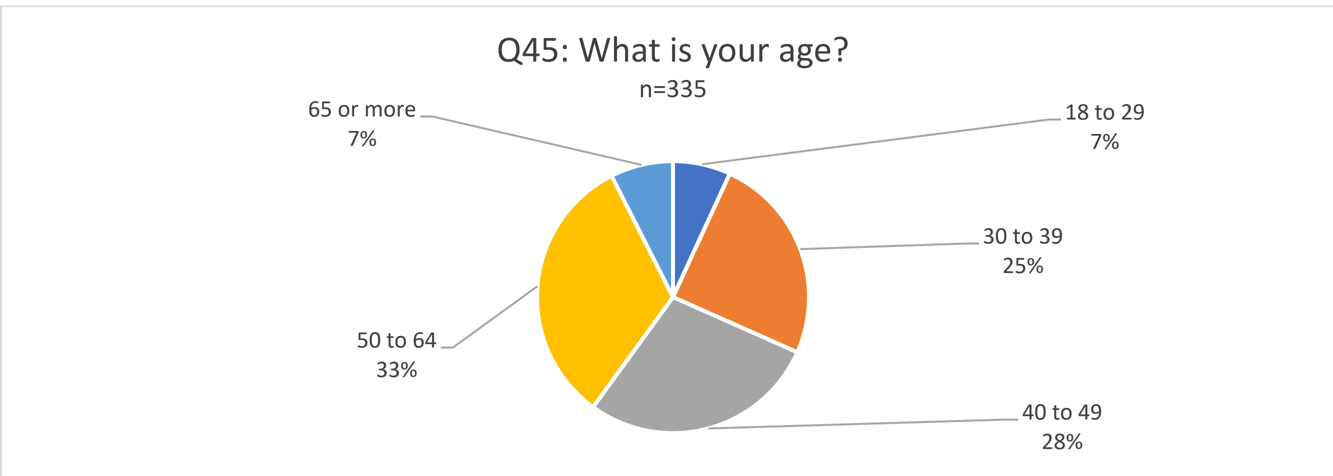
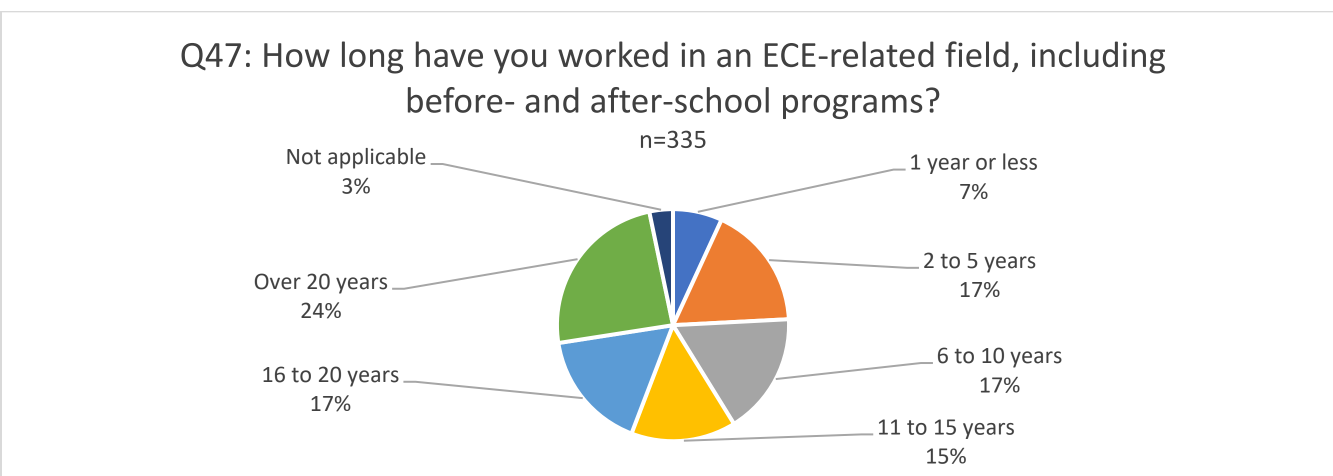


Exhibit III-5

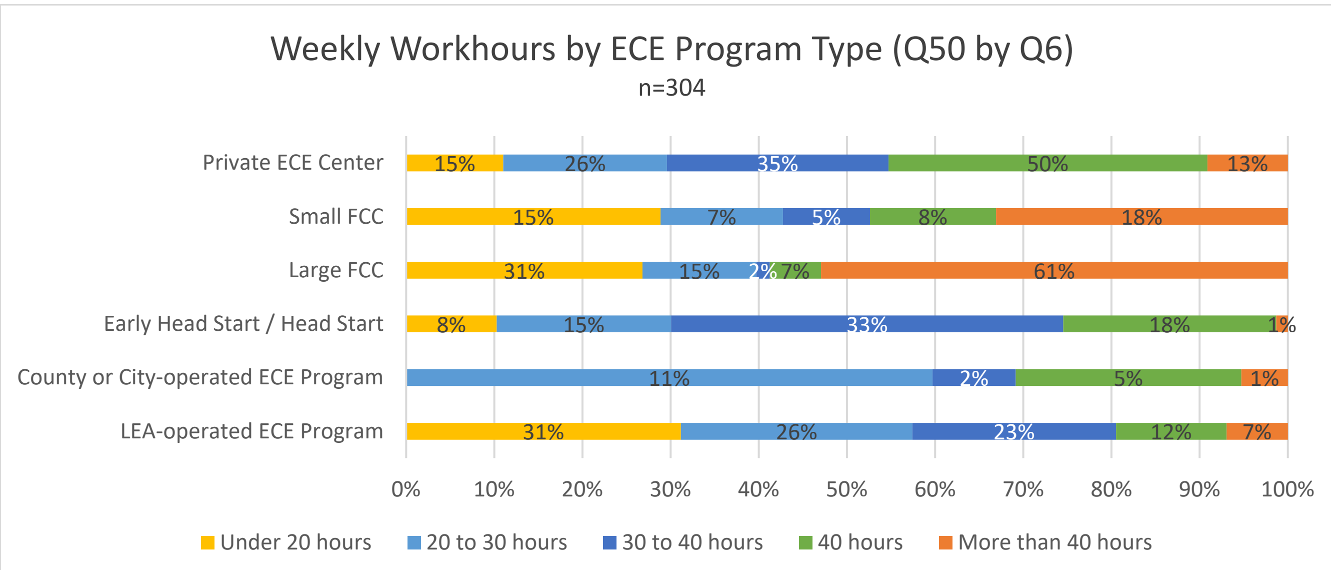


[54] Question 45 (n=335).

Work Hours and Wages

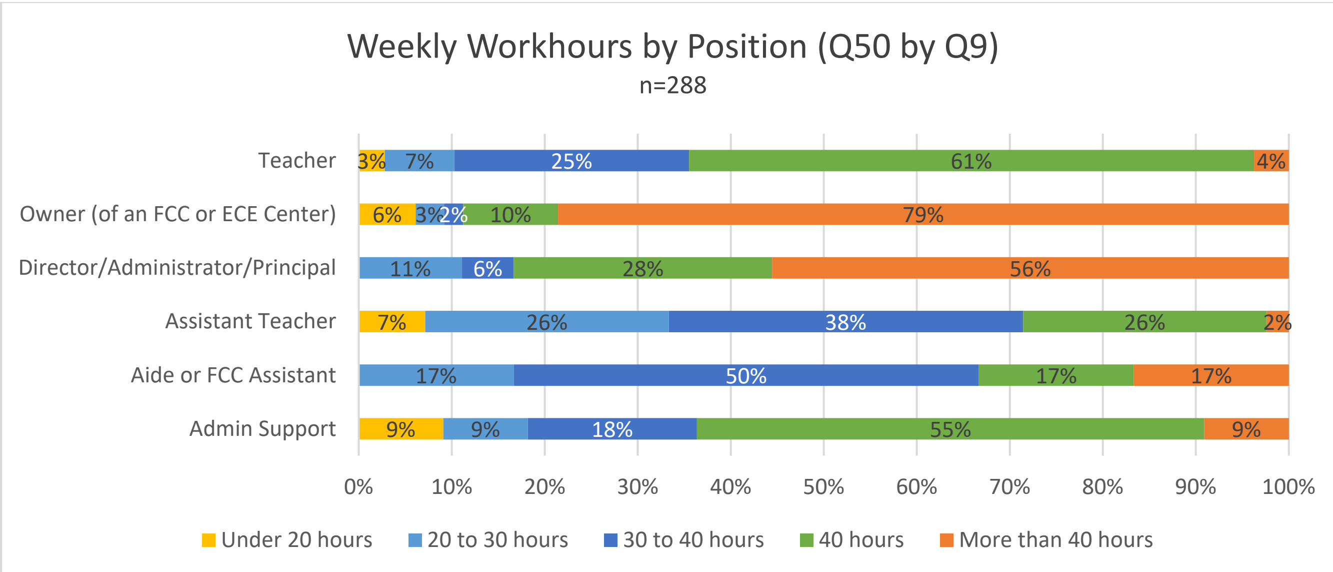
Most of the respondents in the ECE workforce work full-time. About 34% worked more than 40 hours per week, 33% worked 40 hours, and another 18% worked between 30 and 40 hours per week in their ECE position. More differences become apparent when examining this data by ECE program type. Early educators in small and large FCCs especially work long hours, i.e., more than 40 hours per week, or 79% in large FCCs and 55% in small FCCs. In ECE centers, whether private or operated by LEAs, the County, or the city, only 16% or less work more than 40 hours. **Exhibit III-6** shows hours worked by type of provider.

Exhibit III-6



Furthermore, there is a notable difference in the number of hours worked per week by position. Owners, again representing mostly FCC owners, work the longest hours (79% over 40 hours), followed by directors, administrators, or principals at 56%. In teaching positions, such as those of teachers, assistant teachers, or aides, it is more unusual to work more than 40 hours per week. Sixty-one percent of teachers work 40 hours per week, 64% of assistant teachers work between 30 and 40 hours, and 50% of FCC assistants or aides work between 30 and 40 hours (see **Exhibit III-7)**.

Exhibit III-7



This is important context for interpreting the responses to the question about hourly and monthly wages. Approximately one-third of the respondents did not specify their hourly wage, as they were either not sure (18%) or salaried (12%). About 9% of respondents earned between \$11 and \$15 per hour, 22% between \$16 and \$20 per hour, 20% \$21 to \$25 per hour, 12% earned \$26 to \$30 per hour, 5% earned more than \$31 per hour.[55]

Exhibit III-8 shows a comparison of the hourly wage by hours worked. Early educators working over 40 hours have the highest percentage of salaried positions at 22%, as well as the highest percentage earning only \$11 to \$16 per hour at 34%. Those working less than 30 hours tend to have lower hourly wages, with most earning less than \$25 per hour. This aligns with the earlier finding that most FCC owners and center directors work more than 40 hours per week.

Exhibit III-9 summarizes the distribution of hourly wages by position. Owners have the highest percentage of earnings in the \$11 to \$15 per hour range at 36%, and another 34% make \$16 to \$20 per hour. Teaching positions have a similar distribution, with 26% of teachers earning \$16 to \$20 per hour and 38% earning \$21 to \$25 per hour (see **Exhibit III-9**).

Exhibit III-10 shows an analysis of hourly wages by years of experience in the ECE field. As can be expected, wages increase with the number of years worked in the field, with one notable exception. Respondents with more than 20 years of experience had relatively high percentages of early educators earning below \$20 per hour, at 48%. This

[55] Question 49 (n=333).

is likely due to the high representation of FCC owners in this group. Almost half of the respondents with over 20 years of experience in the ECE field work in FCCs.

Exhibit III-8

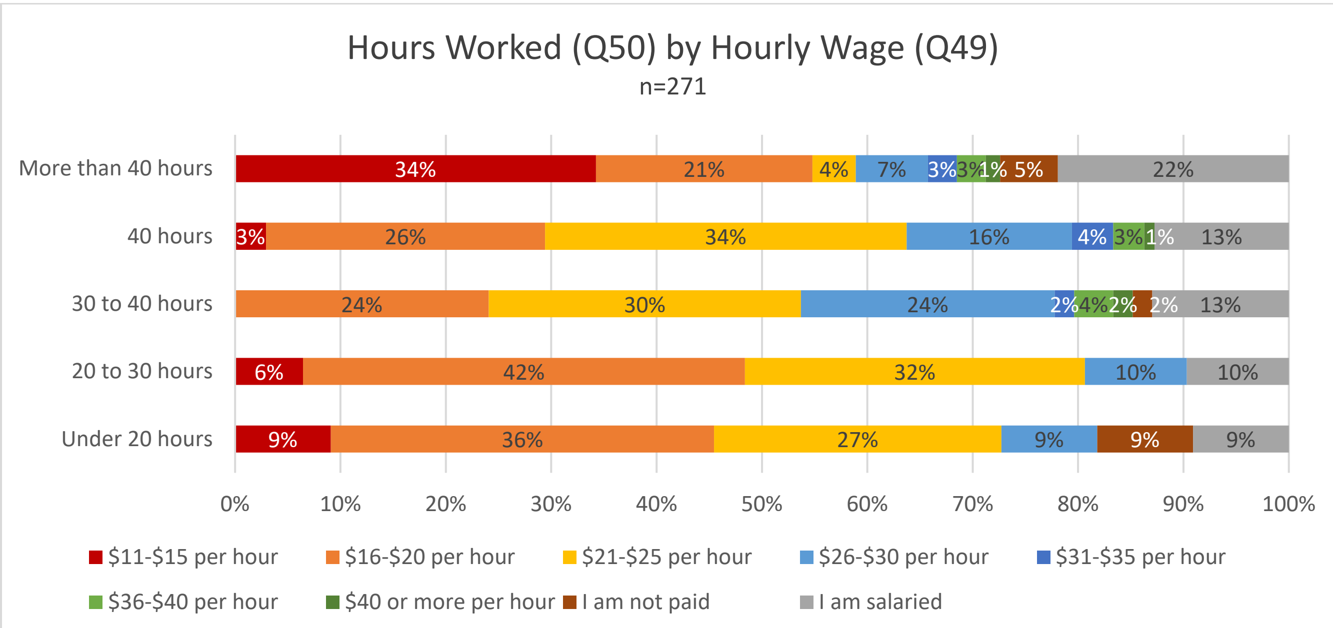


Exhibit III-9

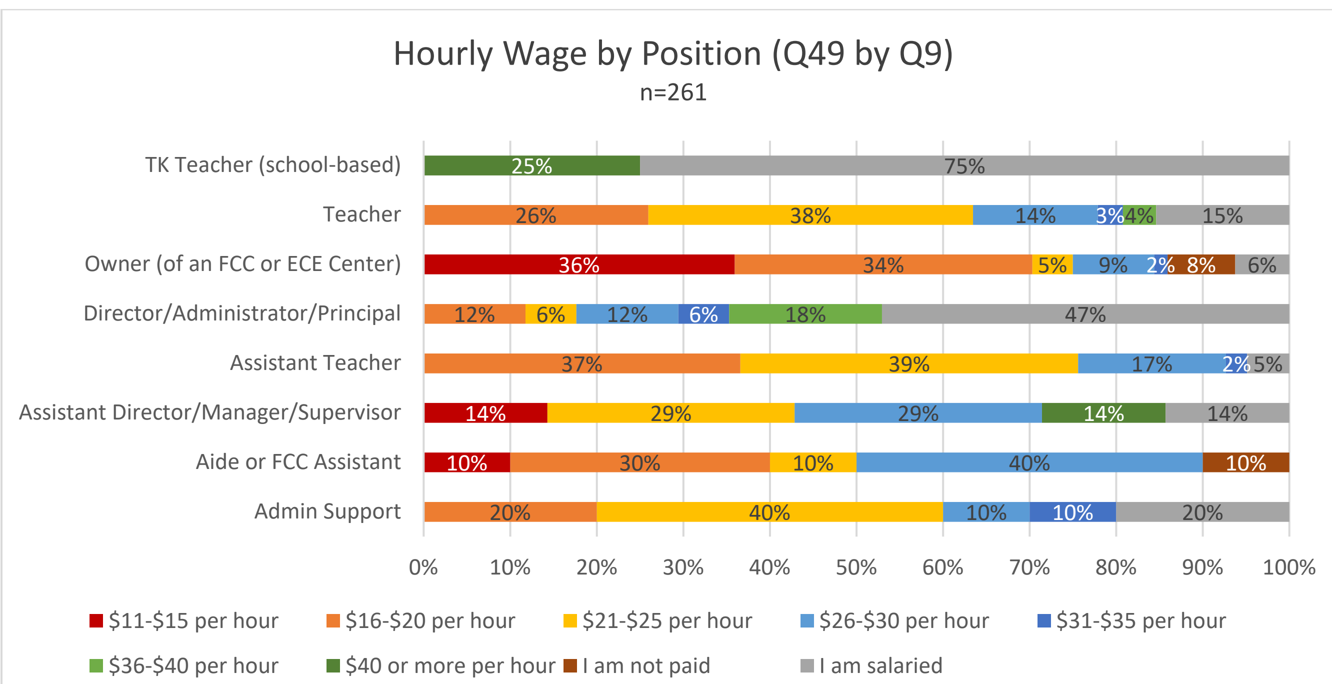


Exhibit III-10

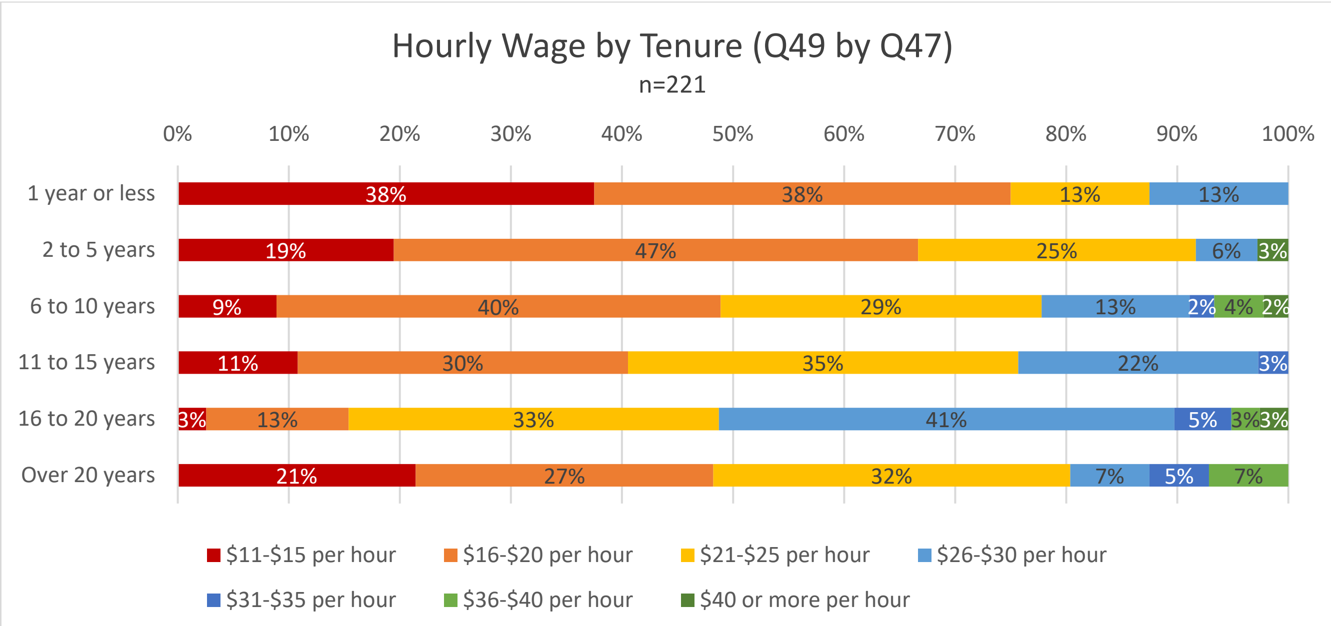


Exhibit III-11

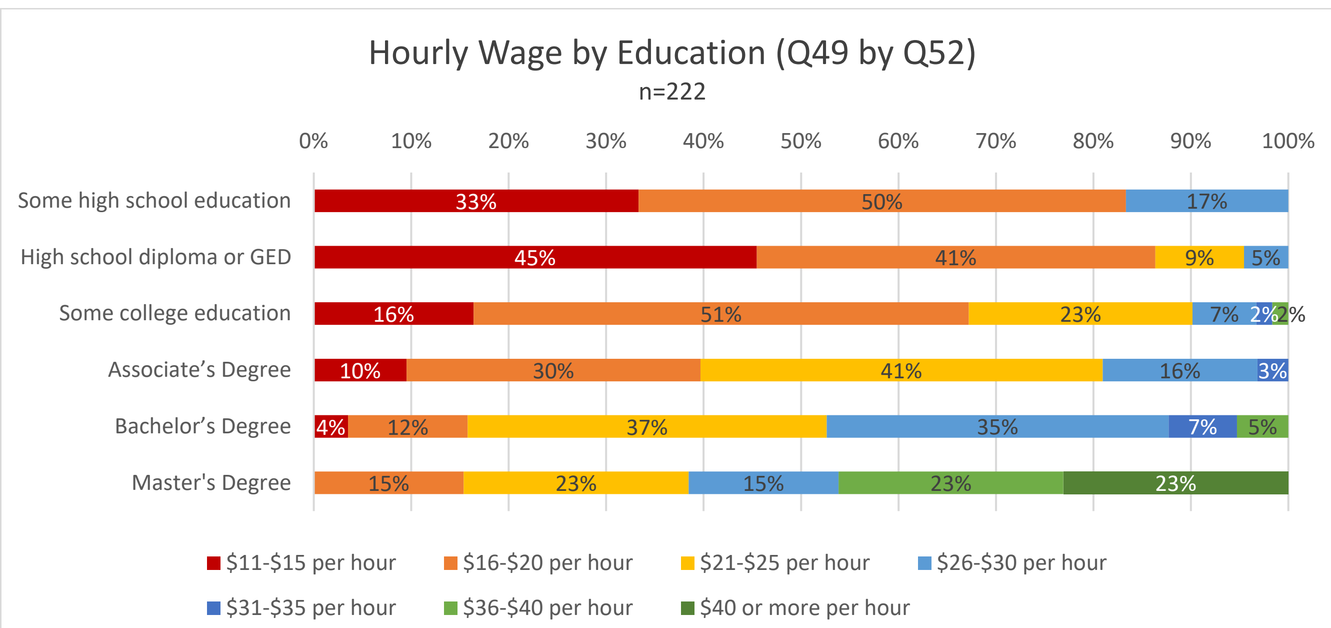
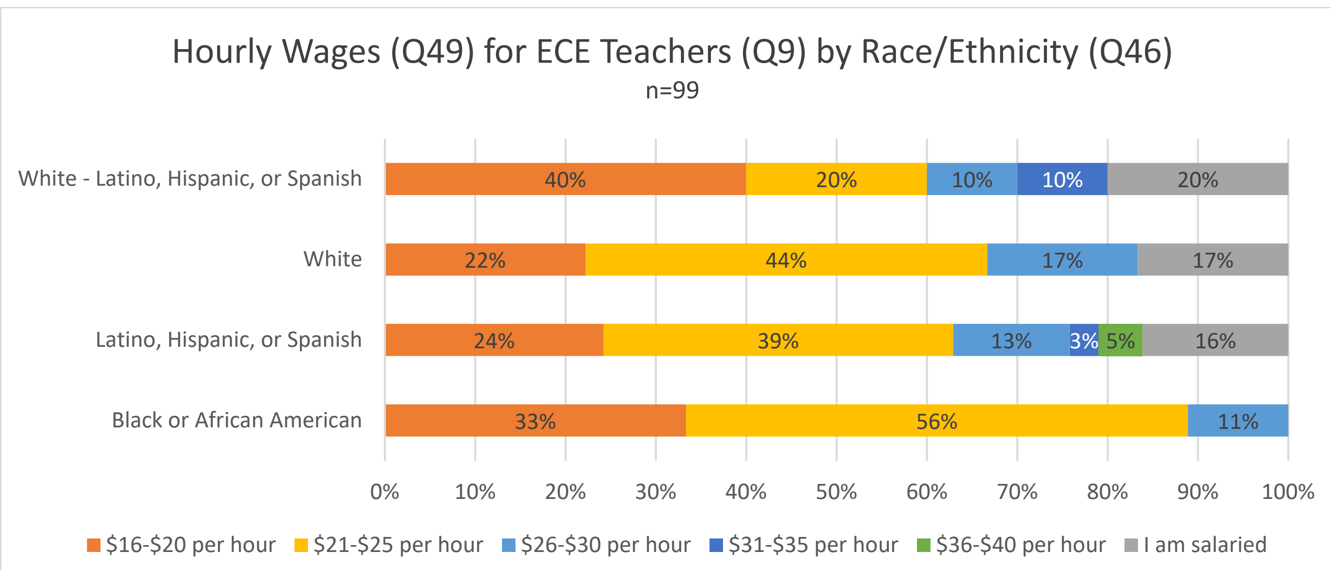


Exhibit III-11 visually presents the hourly wages by level of education. A correlation between higher education and higher hourly wages can be observed. Interestingly, the group with only "some high school education" earns more than respondents with a high school diploma. Respondents without a high school diploma have a lower percentage of early educators earning $11 to $15 per hour (33% compared to 45%). More of them also earn $26 to $30 per hour (17% compared to 5%) than respondents with a high school diploma. None of the respondents with a Master's degree earned less than $15 per hour, and this was the only group with 23% of respondents earning more than $40 per hour.

Given that recent research has shown notable pay disparities based on race and ethnicity, we examined the survey results for this metric. Because of the lower representation among several of the racial groups in combination with different positions, this analysis only compared hourly wages for teachers among Black, Latine, and White early educators. None of the Black teachers earned more than $30 per hour, or were on salary, and this group had the highest percentage (56%) of an hourly rate between $21 and $25 an hour. Hispanic or Latine teachers were the most represented. Their answers covered most wage ranges, with 5% earning $36 to $40 per hour, 3% earning $31 to $35 per hour, and 13% earning $26 to $30 per hour. The percentage of teachers earning $16 to $25 per hour was 89% for Black teachers, 63% for Latine teachers, 66% for White teachers, and 60% for White and Hispanic teachers (see **Exhibit III-12**).

Exhibit III-12



Results for ECE workers' monthly income show 20% earned less than $2,000, 45% between $2,001 and $4,000, 18% between $4,001 and $6,000, 6% between $6,001 and $8,000, and a total of 10.5% over $8,000 per month.[56] Again, significant differences become visible when comparing this data by different categories.

Exhibit III-13 compares monthly gross earnings of ECE workers by program type. Using this metric, large FCCs have the lowest percentage of gross monthly earnings below $4,000, or 43%. Meanwhile, 17% earn between $8,001 and $10,000, and 9% make more than $10,000 per month. The income distribution of ECE workers is similar in

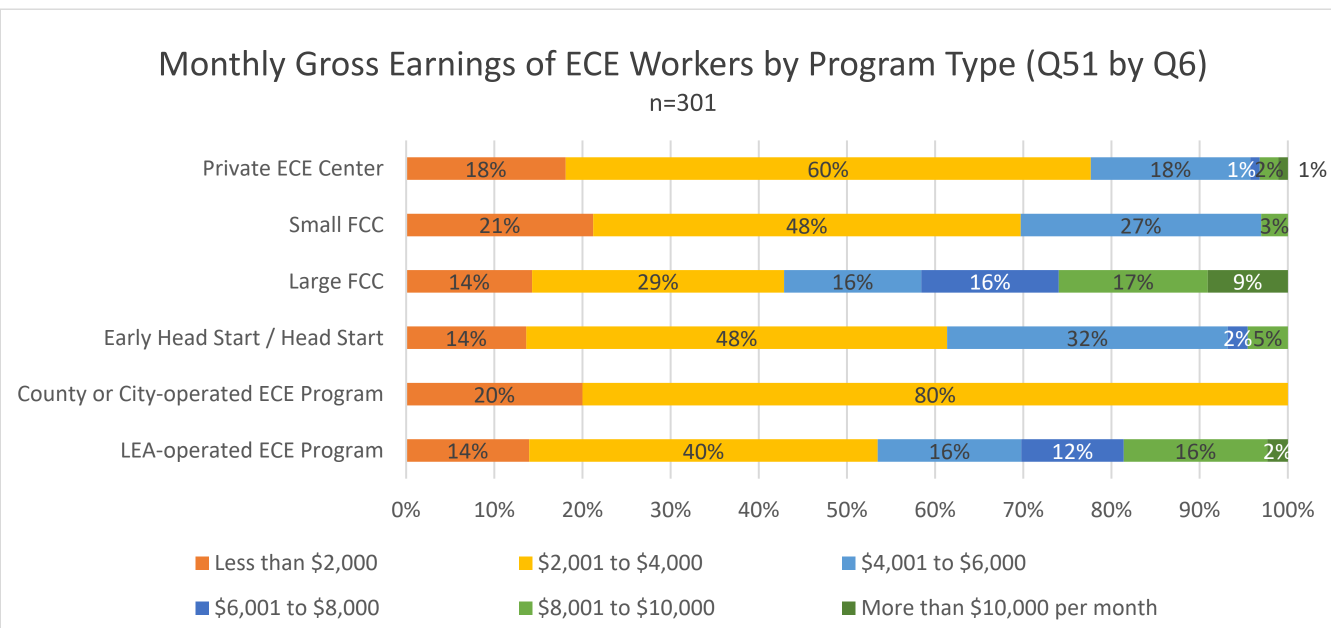
[56] Question 51 (n=325).

LEA-operated ECE programs, with 54% earning less than $4,000 monthly, 16% earning between $8,001 and $10,000, and 2% earning more than $10,000. In contrast, 78% of early educators in private ECE centers earn less than $4,000 monthly, with only 4% earning over $6,000. It is important to note that this analysis does not distinguish between different positions of ECE workers but includes respondents in all roles.

Exhibit III-14 compares monthly gross earnings of teachers in selected ECE programs. In private ECE centers, most teachers, or about 75%, earn between $2,001 and $4,000 a month. In early Head Start and Head Start programs, 41% earn between $2,001 and $4,000 a month, while the majority, or 55%, earn between $4,001 and $6,000 a month. ECE programs operated by school districts show a greater range in monthly incomes: 38% earn between $2,001 and $4,000, 25% earn between $4,001 and $6,000, and 19% earn between $6,001 and $8,000 per month.

Exhibit III-15 compares the monthly gross earnings of directors or owners of private ECE centers and large and small FCC owners. Fifty percent of small FCC owners earn between $2,001 and $4,000 per month, and 32% earn between $4,001 and $6,000.[57] When comparing large FCC owners to directors of private ECE centers, owners of large FCCs have higher monthly gross earnings. 10% make more than $10,000 per month, 18% earn between $8,001 and $10,000, and 16% earn between $6,001 and $8,000, totaling 45% of owners making more than $6,001 per month. In contrast, only 22% of directors or owners of private ECE centers fall into this earnings range.

Exhibit III-13



[57] Please note that the survey had a relatively low response rate among small FCC owners. These results, therefore, have to be interpreted with caution.

Exhibit III-14

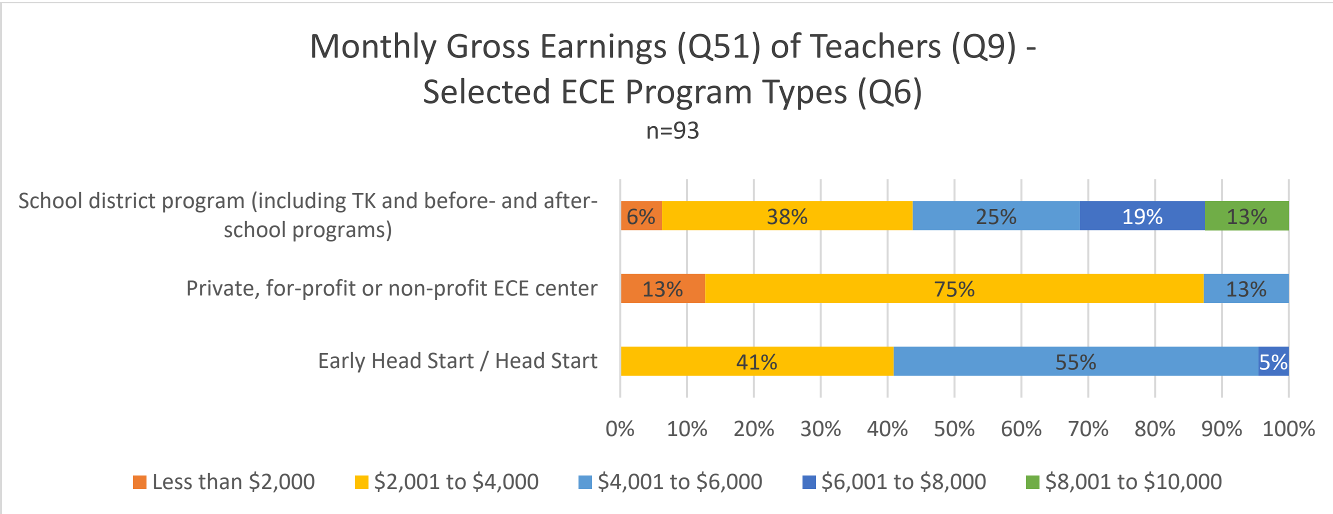
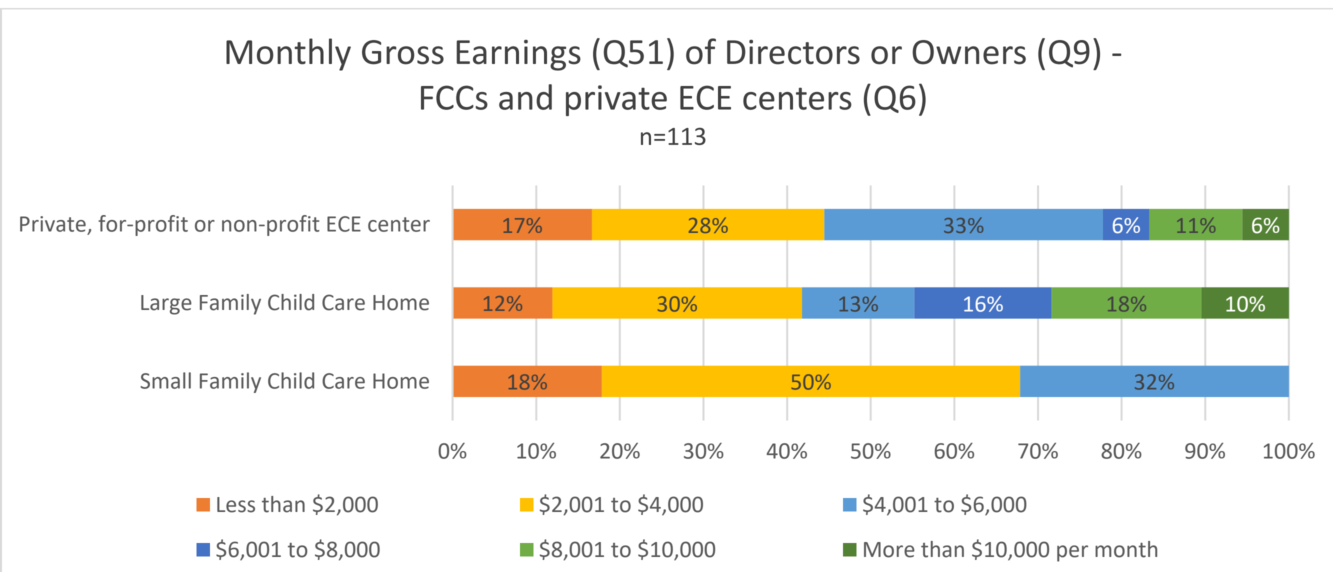


Exhibit III-15

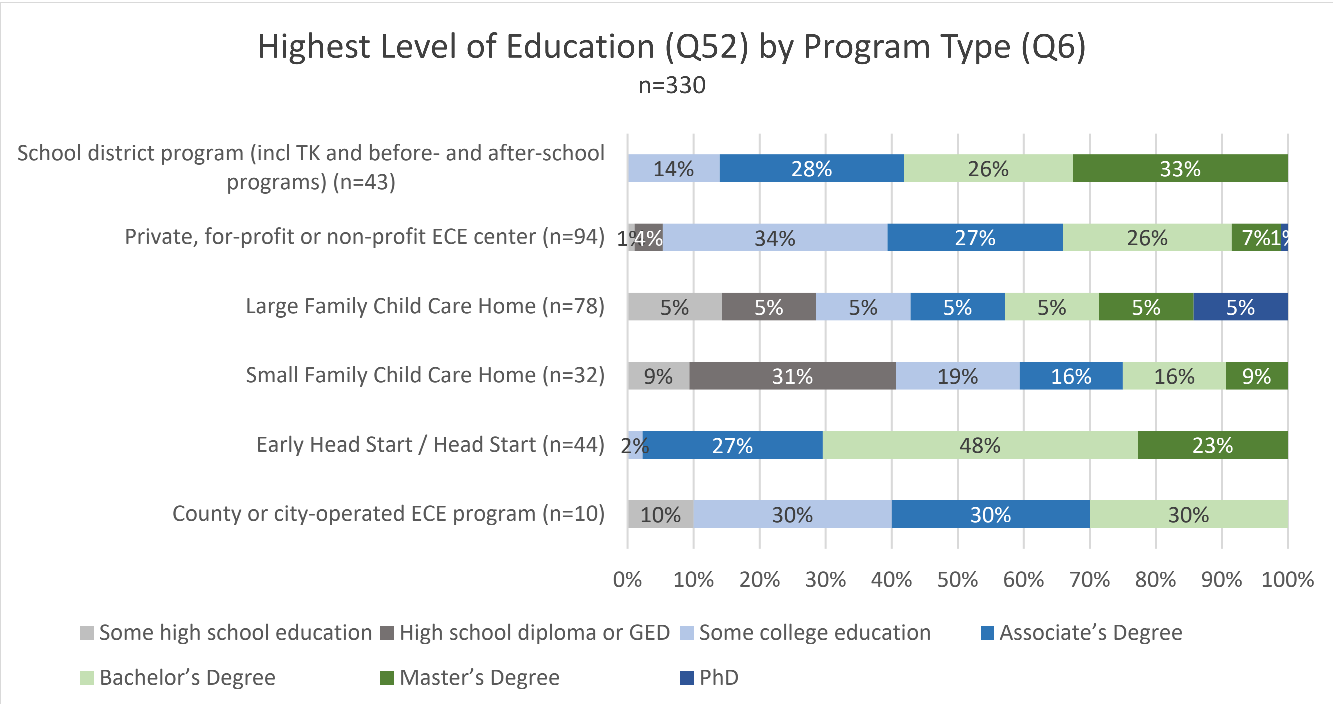


Training and Education

The survey included several questions regarding ECE workers' education levels, qualifications, and their desire to pursue further training to advance their ECE careers.

LEA-operated ECE programs have the highest percentage of early educators with a Master's degree at 33%, and all early educators have at least some college education. Early Head Start and Head Start programs have the highest combined percentage of early educators with a Bachelor's or Master's degree at 71%. Among FCCs, there is a higher percentage of early educators who only have some high school education (9% for small and 5% for large FCCs) or a high school diploma (31% for small and 5% for large FCCs), while there is also a small number of PhDs operating large FCCs (5%) (see **Exhibit III-16**).[58]

Exhibit III-16



Of the respondents, 61% had taken early childhood education or child development units as part of their training to work in the ECE field. The second most common credential was a Child Development Permit at 40%.[59] Among those with a Child Development Permit, 35% held a teacher permit, 32% a site supervisor permit, 16% a program director permit, and 13% held an associate teacher-level permit.[60] Since the survey was mainly distributed to program directors or supervisors, it is likely that these groups are slightly overrepresented on this topic.

Nearly two-thirds of the respondents are interested in obtaining additional credentials or training to advance their ECE careers, while the rest are either unsure (21%) or declined (18%).[61] **Table III-4** compares the percentage and number of respondents by their current credentials with their desired credentials. An equal number of

[58] Please note that the survey had a relatively low response rate among small FCC owners. These results, therefore, have to be interpreted with caution.
[59] Question 53 (n=327)
[60] Question 54 (n=128)
[61] Question 55 (n=332)

respondents (32%) expressed interest in obtaining a PK-3 ECE Specialist Instruction credential or an ECE-related Bachelor's degree, closely followed by another 31% who wished to obtain a Child Development Permit.

Table III-4
Current and Desired Training and Credentials
Riverside County Needs Assessment - 2025

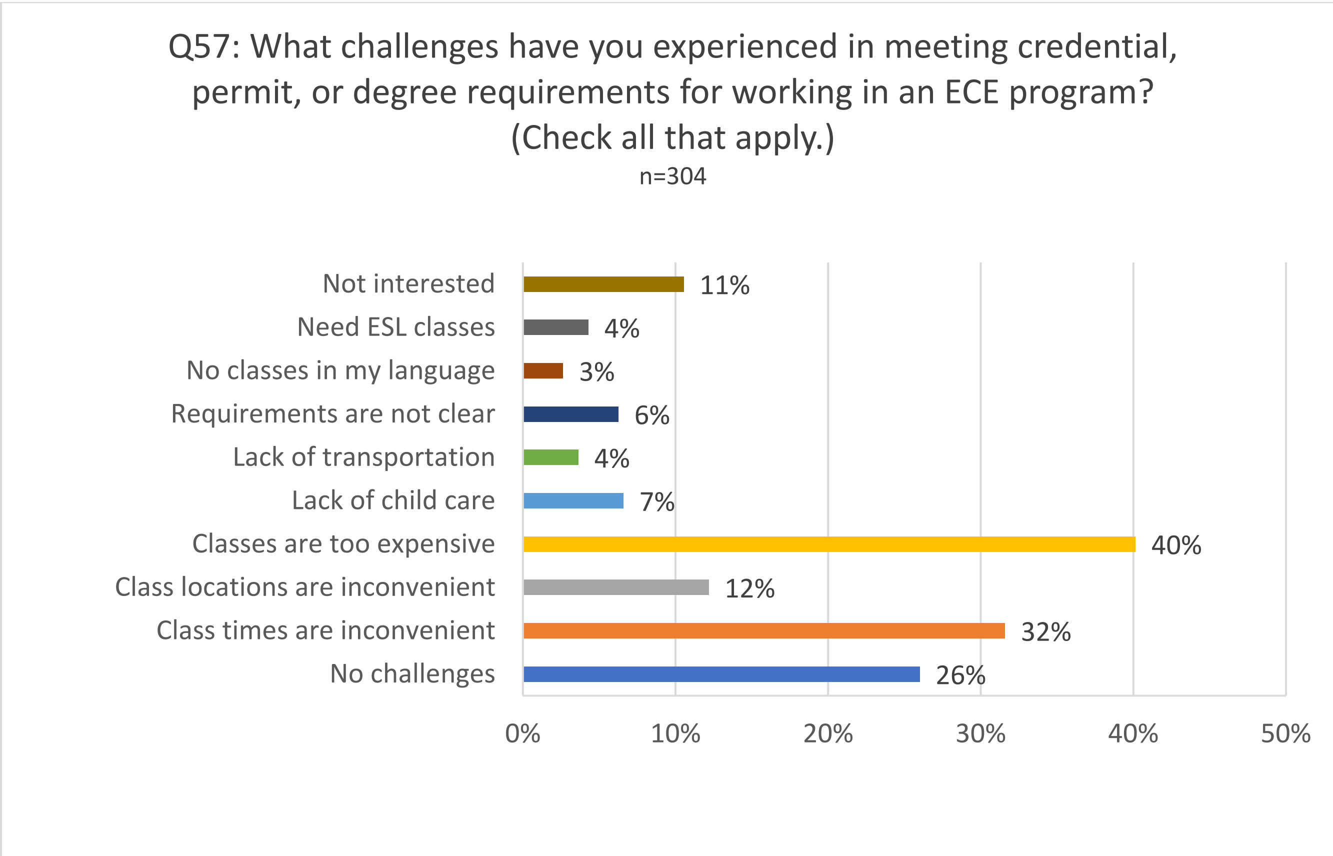
Credentialing/Permit/Education	Current Credentials (Q53)		Desired Credentials (Q56)	
	% of Respondents	# of Respondents	% of Respondents	# of Respondents
Early childhood education (ECE) or Child Development (CD) units	60.6%	198	NA	NA
Child Development Associate (CDA) Program	13.8%	45	NA	NA
PK-3 ECE Specialist Instruction credential	2.5%	8	31.7%	63
Special Education Specialist Instruction credential	3.7%	12	13.6%	27
Multiple Subject credential	5.5%	18	14.6%	29
Child Development Permit	39.8%	130	31.2%	62
ECE-related Associate's Degree (either AA or AS)	15.0%	49	18.1%	36
ECE-related Bachelor's Degree	13.5%	44	31.7%	63
ECE-related Master's Degree	2.8%	9	24.1%	48
Bachelor's Degree (non-ECE)	7.7%	25	NA	NA
Master's Degree (non-ECE)	4.0%	13	NA	NA
I do not have any credentialing or education in ECE	16.2%	53	NA	NA
Other (please specify)	5.8%	19	4%	7

Q53: n=327; Q56: n=199
Please note: Q56 did not include all the same answer option as Q53.
Source: Brion Economics, Inc.

"The pay that I receive is not worth putting myself in debt."
Survey Respondent Comment

When asked about challenges in meeting credential or degree requirements, 40% selected "Classes are too expensive," 32% mentioned inconvenient class times, and 26% indicated that they encountered no challenges (see **Exhibit III-17**). Among the other reasons mentioned by respondents, financial considerations were frequently cited, along with general time constraints resulting from family and job responsibilities or learning disabilities.

Exhibit III-17



Morale and ECE Workers Leaving the Field

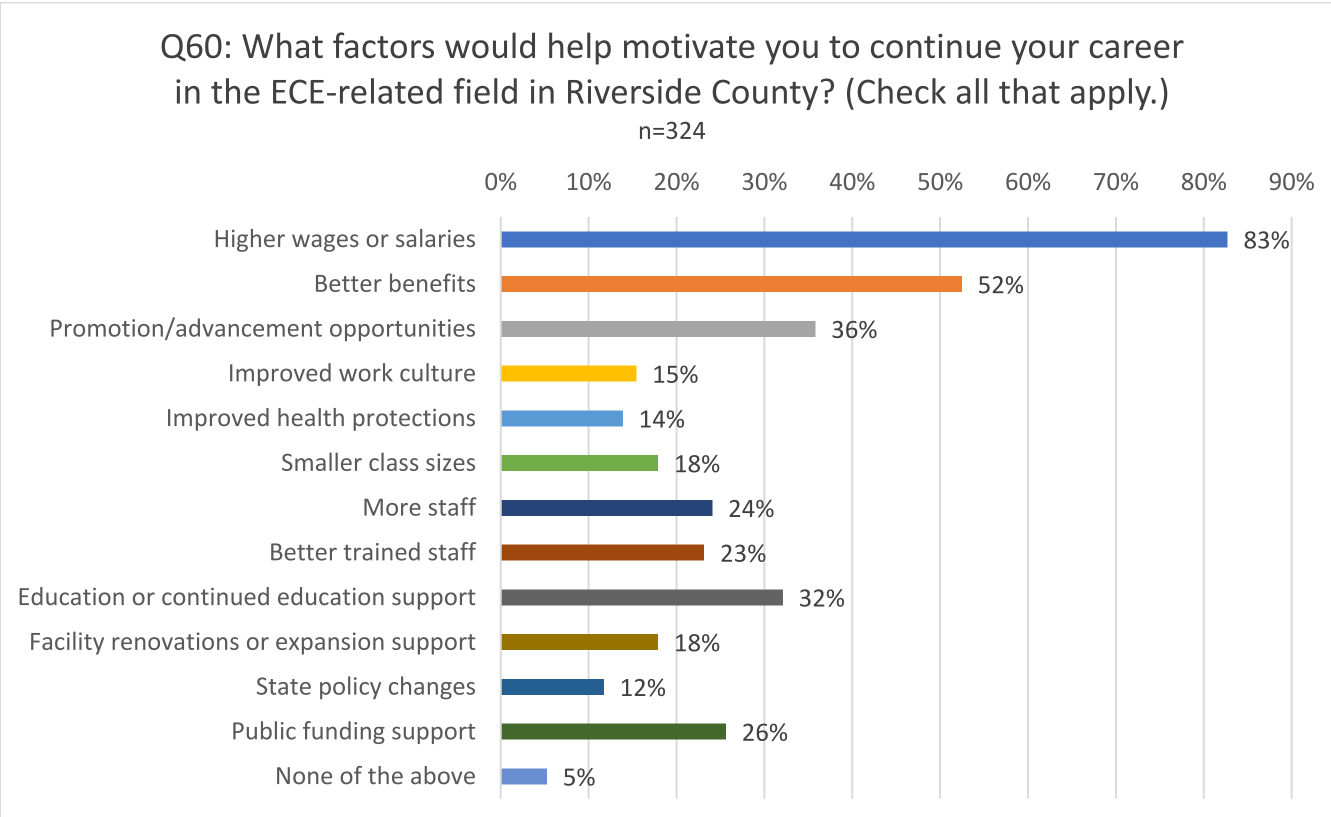
The survey included several questions aimed at assessing the current morale among ECE workers, such as whether they intend to leave the field and, if so, why, as well as what could help them stay engaged. When asked how ECE workers feel when they are at work, positive adjectives like excited/joyous (50%), engaged (49%), grateful (52%), motivated (42%), and inspired/hopeful (36%) received much higher responses than negative adjectives. Exhausted received the most responses among the negative feelings at 14% followed by stressed/anxious (13%).[62]

When asked what can help motivate them to stay in the ECE field, ECE workers clearly identified higher wages or salaries (83%) and better benefits (52%) as the most important factors. Other reasons received fewer responses but are still important, such as opportunities for promotions (36%), support for continuing education (32%), and public funding support (26%) (see **Exhibit III-18**).

[62] Question 48 (n=330).

On a positive note, only 4% of ECE worker respondents indicated that they plan to leave the ECE field in the next 12 months. Another 15% were undecided.[63] Among the 12 respondents who indicated that they would leave the field, 25% were retiring, but 75% of them mentioned insufficient pay as the reason.[64]

Exhibit III-18



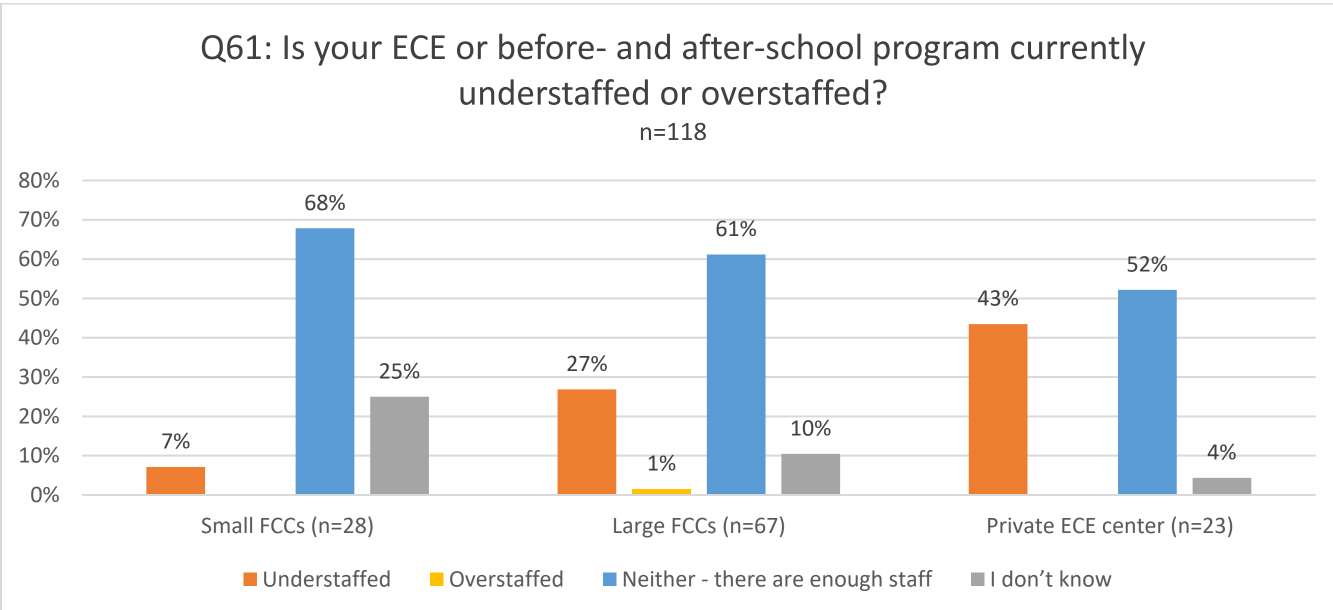
Staffing Issues

Among all respondents, only 26% indicated that their ECE program is currently understaffed. However, there are significant differences by program type here. Among the owners or directors of private ECE centers, 43% reported being understaffed, while 52% indicated that they had sufficient staff (see **Exhibit III-19**).[65] Eight respondents, or 7%, indicated that they had to close classrooms due to the lack of workforce in the last two years.[66] Of

[63] Question 58 (n=327).
[64] Question 59 (n=12).
[65] Please note that the survey had a relatively low response rate among small FCC owners. These results, therefore, have to be interpreted with caution.
[66] Question 63 (n=63)

respondents, 39% indicated that they have challenges finding qualified ECE workers. Many respondents mentioned the inability to provide higher wages as the main obstacle to finding qualified ECE workers.[67]

Exhibit III-19



"Everyone that I try to hire [wants a] minimum of $20 an hour and I don't even make that."
Survey Respondent Comment

Table III-5 summarizes the number of open positions as mentioned by survey respondents. 52% of respondents needed to fill a position for an Infant/Toddler teacher, 48% needed a Preschool teacher, and 44% an assistant teacher. In total, 83 positions needed to be filled, with 19 before- and after-school teacher positions being the highest, followed by 17 Infant/Toddler teachers, and 17 admin support positions. Because of the small number of respondents to this particular question, it is not representative but merely an indication of staffing needs in the County.

[67] Question 64 (n=120).

Table III-5
Open ECE Staff Positions - Q62
Riverside County Needs Assessment - 2025

Position	% of Respondents Looking to Fill This	Total # of Positions Needing to Be Filled
Director	7%	2
Assistant Director/Manager	7%	3
Admin Support	11%	17
Infant/Toddler Teacher	52%	17
Preschool Teacher	48%	5
Transitional Kindergarten Teacher	22%	5
Before-/after-school Teacher	22%	19
Assistant Teacher	44%	11
Aide or FCC Assistant	37%	2
Other	7%	2
Totals		**83**

Total n for this question is 27.
Source: Brion Economics, Inc.

III.2 ECE Programs

This section summarizes various questions regarding ECE programs, including children served, the kinds of subsidies used, children with special needs, challenges facing providers, and other related questions.

Number of Children Served and Subsidized Programs Used

Table III-6 presents the average number of children per age group for small and large FCC providers, as well as private ECE centers, based on the survey responses.[68] FCCs typically serve about 3 Infants/Toddlers, with 2 (small FCCs) or 4 (large FCCs) preschool-aged children, and about 3 to 4 children in after-school care. Among private ECE centers, the average capacity is 85 for Preschool, 35 for Infants/Toddlers, and 32 for before- and after-school care.[69]

[68] Responses of other program types, such as LEA-operated programs or Early Head Start programs, are not shown because of a lack of relevant responses.
[69] Please note that the survey had a relatively low response rate among small FCC owners. These results, therefore, have to be interpreted with caution.

Table III-6
Enrollment Capacity by Program Type - Q11
Riverside County Needs Assessment - 2025

Age Group	% of Respondents Serving Age Group	Average Capacity by Program Type		
		Small FCC (n=30)	Large FCC (n=65)	Private ECE center (n=28)
Infants/Toddlers (ages 0 up to 3)	88%	3	3	35
Preschool (ages 3 to 5, not TK)	88%	2	4	85
Transitional Kindergarten (age 4)	56%	2	2	17
Before/after-school (ages 4 to 12)	67%	3	4	32
Total Capacity		**7**	**12**	**130**

Total n for this question is 147.
Source: Brion Economics, Inc.

Among respondents, CalWORKs Stage 1 payment vouchers were the most commonly received subsidy at 43%, followed by Stage 2 & 3 vouchers at 34%. Additionally, 15% received Alternative Payment vouchers or funding through the California State Preschool Program (CSPP) program.[70] (See **Chapter IV, Section 4** for more information regarding subsidized programs.)

Challenges Facing ECE Programs

When asked to rate certain components of their ECE program, respondents rated wages and salaries most often as "deficient" or "very deficient" at 44%, followed by benefits at 41%, and office/storage space at 34% (see **Exhibit III-20**). Training and education support was most often rated as "excellent" (33%), followed by equipment and toys (25%) and supplies and materials (23%).

> *"With the hard work that my workers put in, in reality, I believe that they should be getting paid more per hour. I pay them $17 [per hour] and they have no units. They should be getting $19 to $20 [per hour]. I have things that need to be replaced and not enough money, so I am just waiting. They are still in good [condition], but old and need to look better. I don't offer much benefits, besides a retirement plan, but I don't even match it."*
> *Survey Respondent Comment*

[70] Question 12 (n=137).

Another question asked for the biggest challenges facing their ECE Program. Here again, the inability to offer higher wages and benefits ranked first at 51%, followed by the general lack of finances and resources at 42%, and the lack of workforce at 35% (see **Exhibit III-21**). Points that are less of a significant challenge include Infrastructure and systems, and the lack of equipment and supplies.

Exhibit III-20

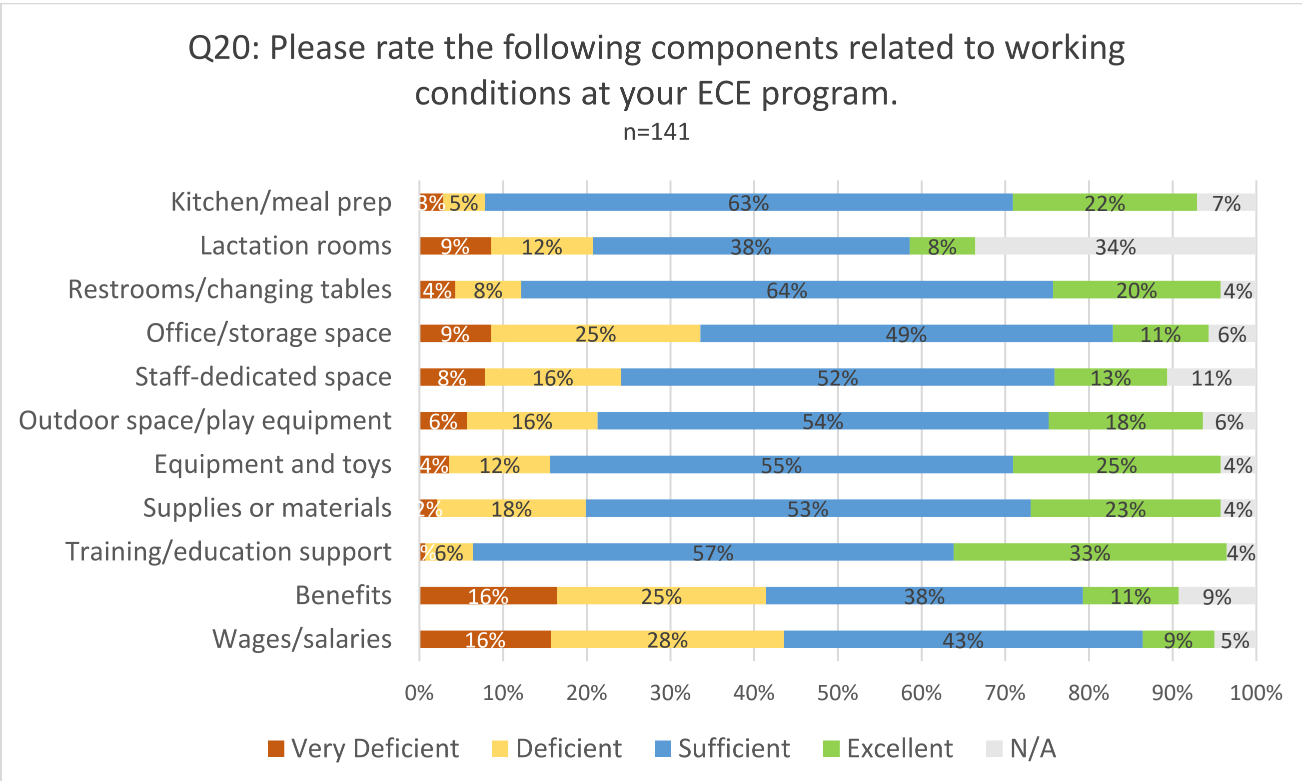
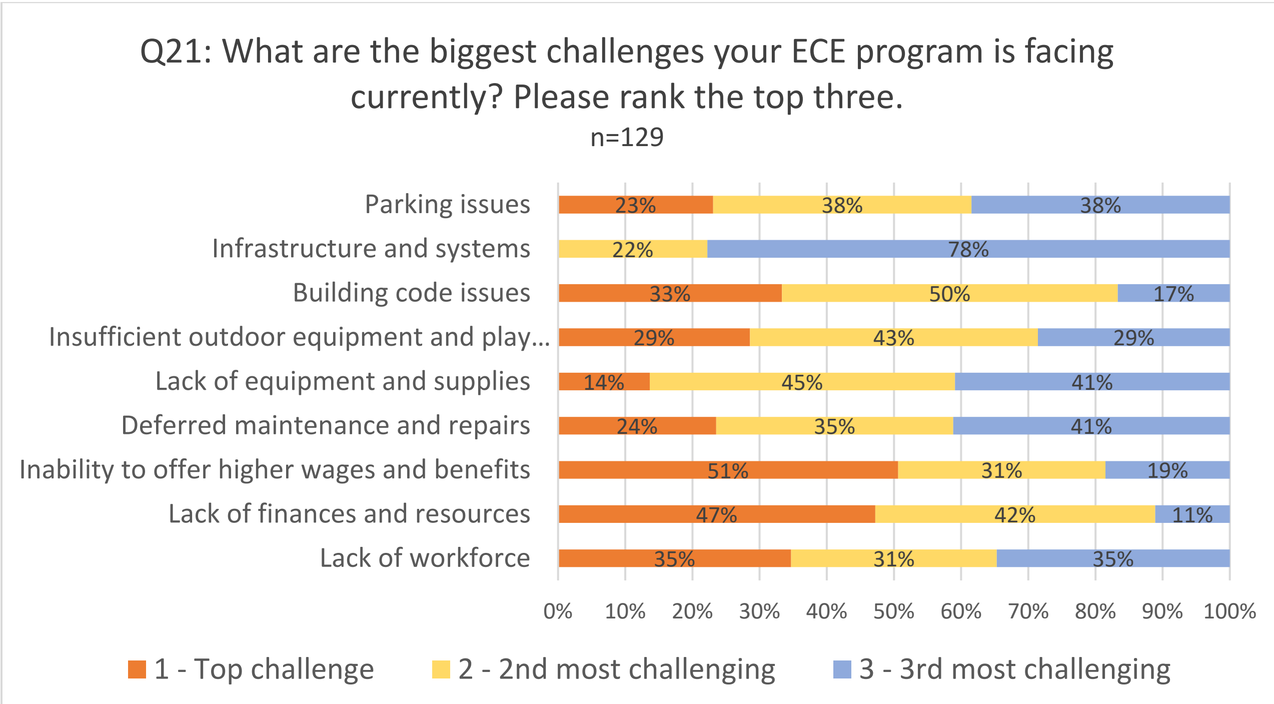


Exhibit III-21



Children with Special Needs

Of the survey respondents, 42% served children with special needs.[71] Autism was the most commonly mentioned impairment, 86% of respondents served at least one child with autism, amounting to a total of 150 children, or 27% of reported children. About 60% of respondents served children with speech or language impairments, and a total of 180 children (32% of reported children) with this impairment were reported. Children with emotional disturbance ranked third according to the number of children reported, at 98 or 17% of total children reported. About 38% of all respondents served children with an emotional disturbance (see **Table III-7**).

In general, providers reported a high degree of accessibility for their current physical space. The indoor play space was most often in need of improvement to accommodate children with exceptional needs (19%), followed by the building access at 12% (see **Exhibit III-22**). Staffing issues seem to be the more significant need to improve providers' ability to serve children with special needs. About 46% mentioned needing more staff training or coaching to better serve these children. Materials and equipment at 45% and additional staff at 40% also ranked higher than changes in the physical environment at 28% (see **Exhibit III-23**).

[71] Question 25 (n=172).

Table III-7
Number of Children with Exceptional Needs - Q26
Riverside County Needs Assessment - 2025

Age Group	% of Respondents Serving Children w This Need	# of Respondents Serving Children w This Need	# of Children Reported	% of Reported Children
Autism	86%	55	150	26.7%
Deaf / hearing impairment	23%	15	6	1.1%
Emotional disturbance	38%	24	98	17.4%
Hard of hearing	22%	14	4	0.7%
Intellectual disability	27%	17	14	2.5%
Orthopedic impairment	20%	13	2	0.4%
Learning disability	39%	25	47	8.4%
Speech or language impairment	59%	38	180	32.0%
Special surveillance or care	25%	16	13	2.3%
Multiple disabilities	31%	20	44	7.8%
Other (please specify)	16%	10	4	0.7%

Total n for this question is 64.
Source: Brion Economics, Inc.

Exhibit III-22

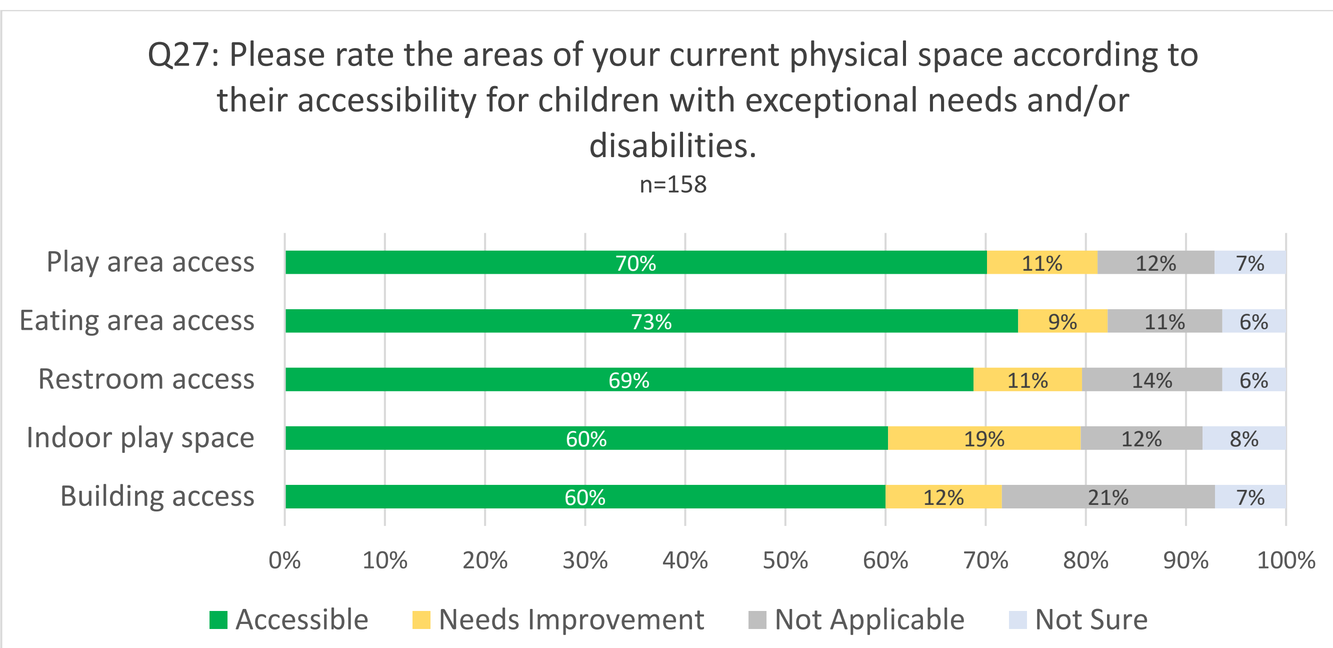
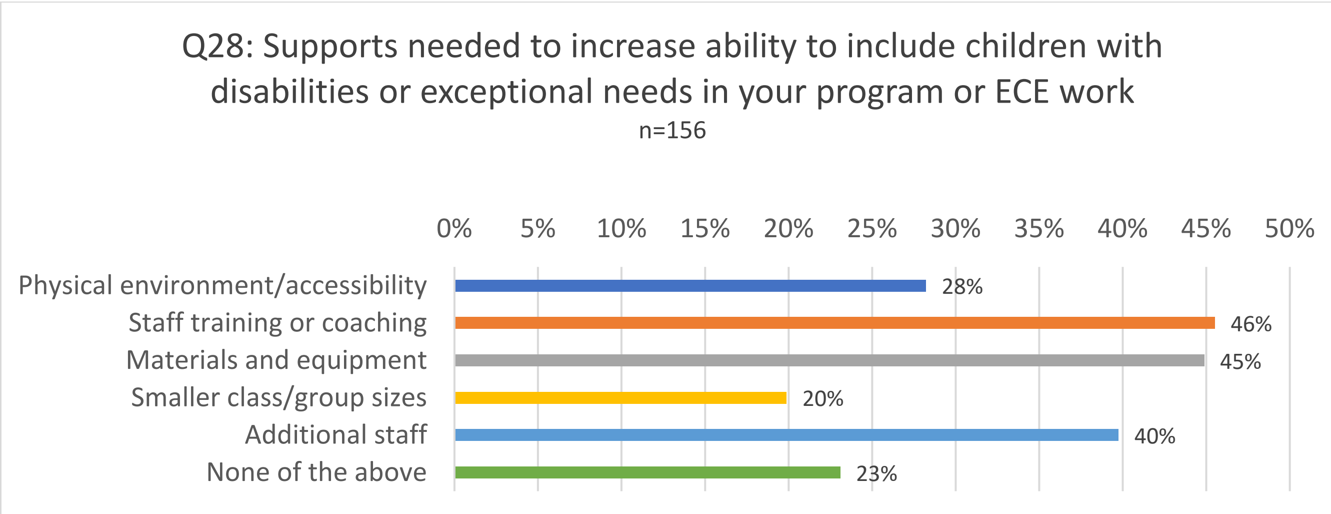
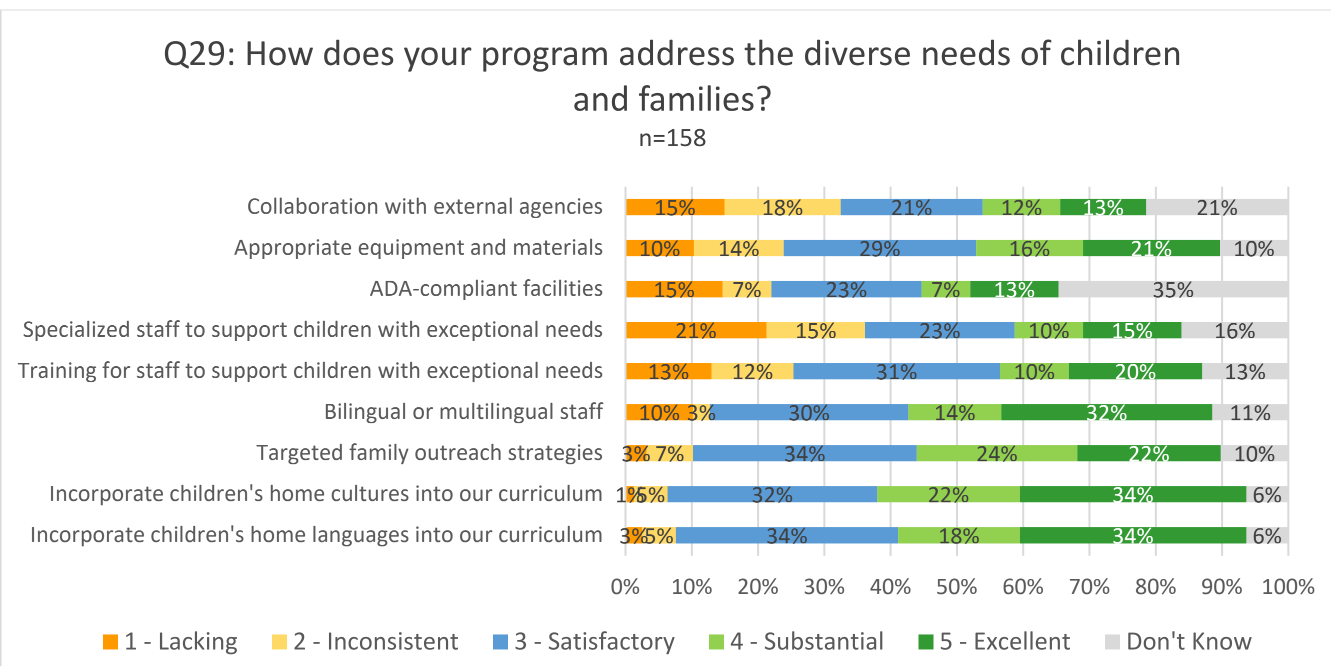


Exhibit III-23



When asked to rate their programs' efforts to address the diverse needs of children in different areas, the availability of specialized staff to support children with special needs was most often rated as either lacking or inconsistent at 36%. This was followed by collaboration with external agencies at 33%, and training for staff to support children with special needs at 25%. Programs most often rated their efforts in incorporating children's home language or culture as excellent at 34% each, followed by the availability of bilingual or multilingual staff at 32% (see **Exhibit III-24**).

Exhibit III-24

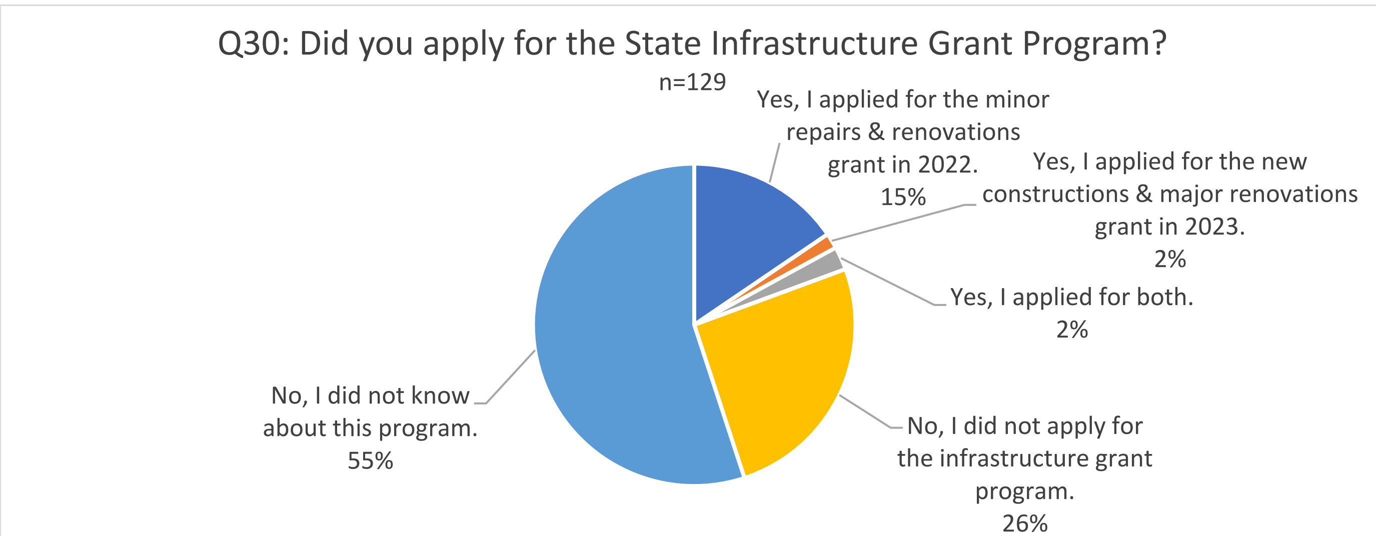


State Infrastructure Grant Program

The survey included several questions about the recent State Infrastructure Grant Program (IGP) for ECE providers to assess potential funding needs, potential increases in capacity, and their overall need for repairs and renovations.

Of the respondents, only 19% had either applied for the minor repairs and renovations grant in 2022 or the new construction and major renovations grant in 2023. The majority of respondents (55%) did not know about this program (see **Exhibit III-25**). The proposed projects ranged in cost from $12,000 to $200,000.[72] Fifteen respondents, or 36%, of those who applied for the program received an award.[73]

Exhibit III-25



Family, Friends, and Neighbor Providers

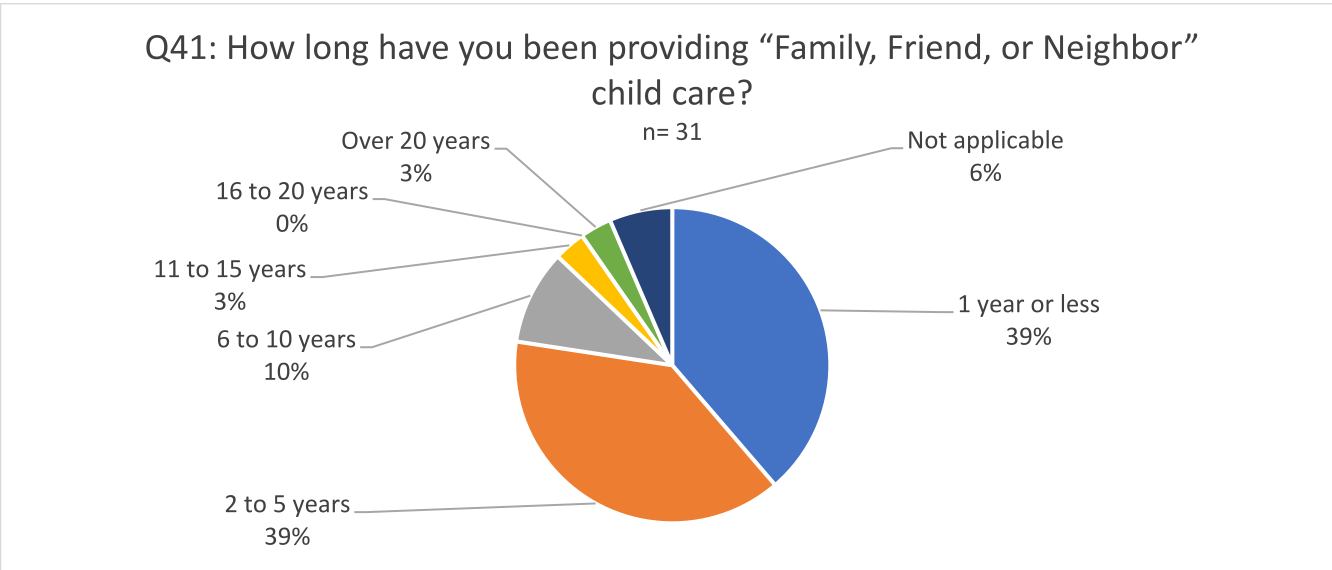
About 8% of survey respondents were Family, Friends, and Neighbors (FFNs), which are considered unlicensed care and generally serve a small number of children relative to other types of providers. However, these respondents represent only 1.7% of the known FFNs in the County. Results in this section, therefore, have to be interpreted with caution.

As **Exhibit III-30** shows, 39% of FFN respondents have been working as an FFN for 1 year or less and another 39% for 2 to 5 years.

[72] Question 32 (n=30).
[73] Question 33 (n=42).

FFNs primarily served infants/Toddlers (52%) and provided before- and after-school care (52%).[74] Nearly half (45%) were interested in becoming licensed as a Family Child Care provider,[75] and 42% of FFN would like to receive referrals from the County.[76]

Exhibit III-26



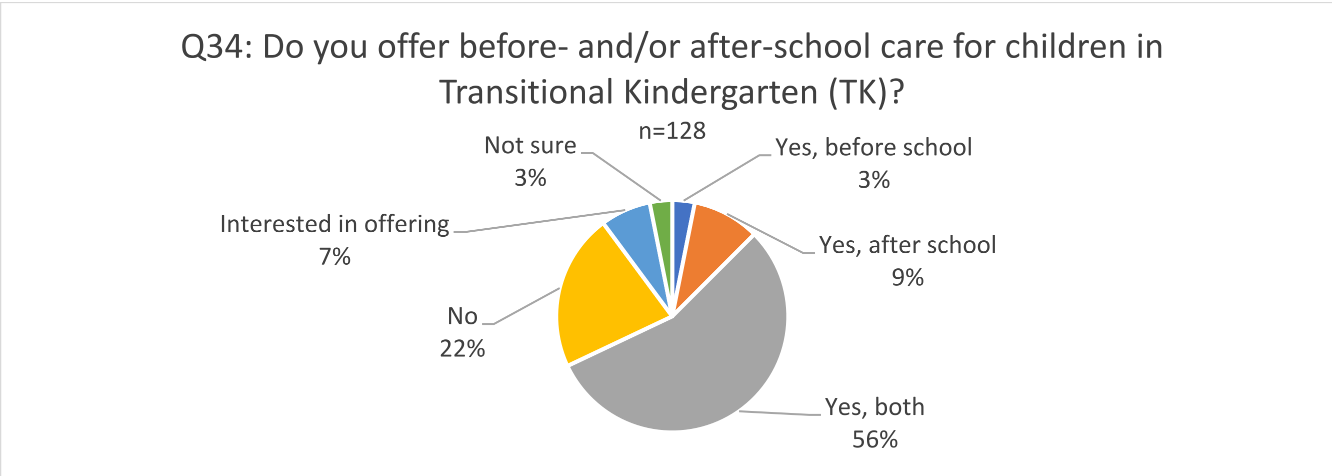
III.3 TK and Wrap-Around Care

While most schools offer a TK program with 6.5 hours of care, wrap-around care before or after TK needs to be provided for many children with working parents. Of all ECE respondents, 56% offered both before- and after-school care. An additional 9% offer after-school care only, and 3% offer before-school care only. Meanwhile, 7% of respondents indicated being interested in offering before- and after-school care (see **Exhibit III-26**). About 48% of respondents also offer transportation to and from the local elementary school to their ECE program.[77]

The survey included several questions to assess the impact of the roll-out of Transitional Kindergarten (TK) on ECE Programs in the County. The most common consequences that providers cited were enrolling fewer 4-year-olds (44%), reduced program income (39%), and no impact (24%). About 15% are no longer enrolling 4-year-olds at all, and another 15% had to lay off staff as a consequence (see **Exhibit III-27**). Of those that have lost children to TK, 32% lost less than 3 children and 28% 3 to 6 children (see **Exhibit III-28**).

[74] Question 42 (n=21).
[75] Question 43 (n=31).
[76] Question 44 (n=31).
[77] Question 35 (n=128).

Exhibit III-27



"I had to go back to school to get my Teachers ECD Certificate for backup in case I have to close because I am no longer getting calls. Every August, I lose 3-4 children, and it's really hurting my business."
Survey Respondent Comment

A question was asked of private providers to gauge their interest in offering wrap-around care for TK students in the County. Six percent of providers indicated that they are currently collaborating with local public schools in offering TK wrap-around care. About one-third indicated being interested in such collaboration.[78] Partnerships to offer TK wrap-around care, however, were outranked by other strategies aimed at helping ECE providers manage the changes brought by TK programs. More equipment to serve different age groups received the highest response at 46%, followed by funding to provide wrap-around care at 45%, and facility improvements at 42% (see Exhibit **III-29**).

[78] Question 39 (n=125).

Exhibit III-28

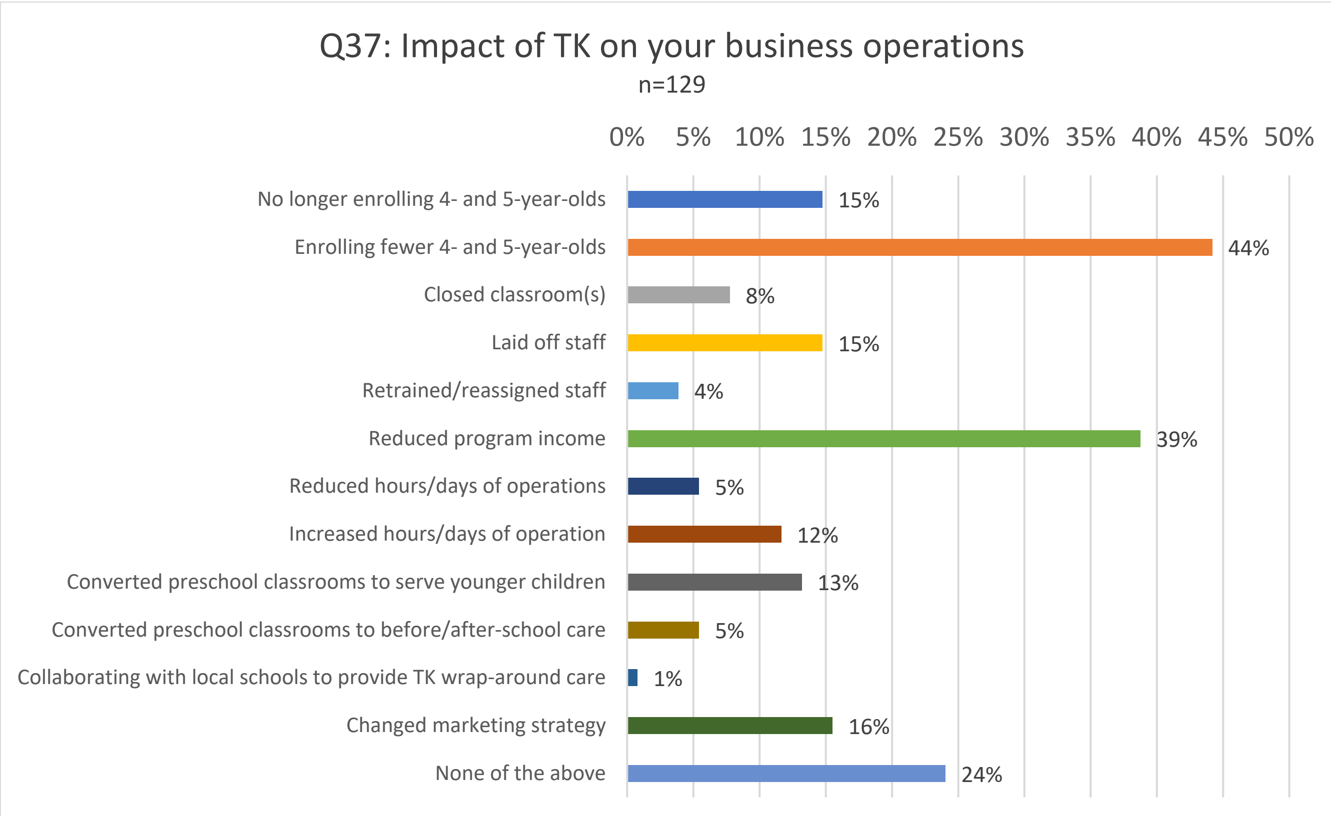


Exhibit III-29

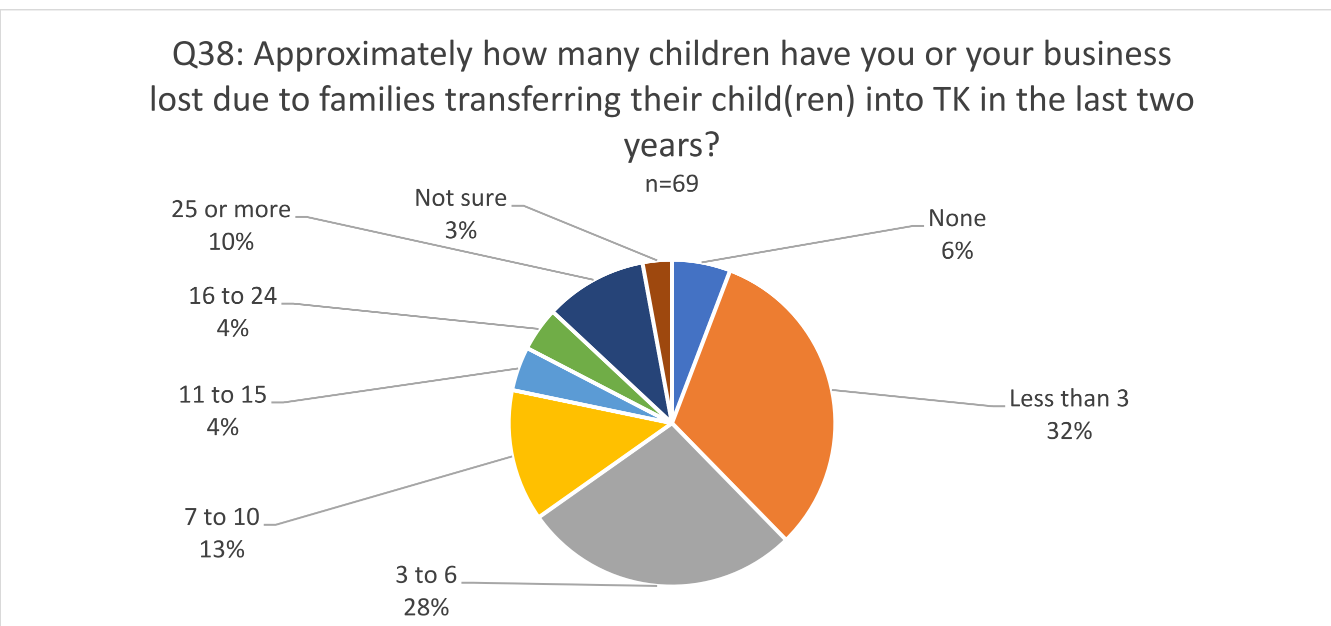
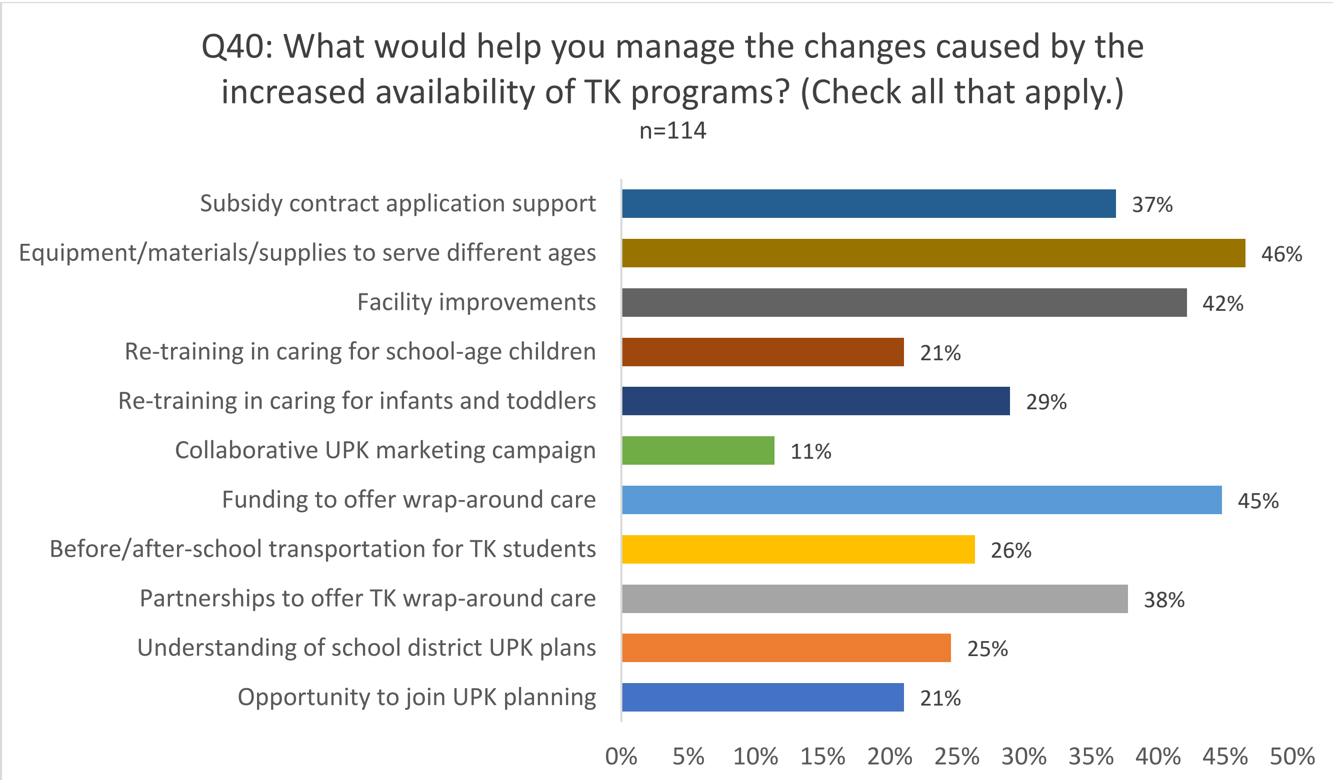


Exhibit III-30



III.4 Importance of ECE

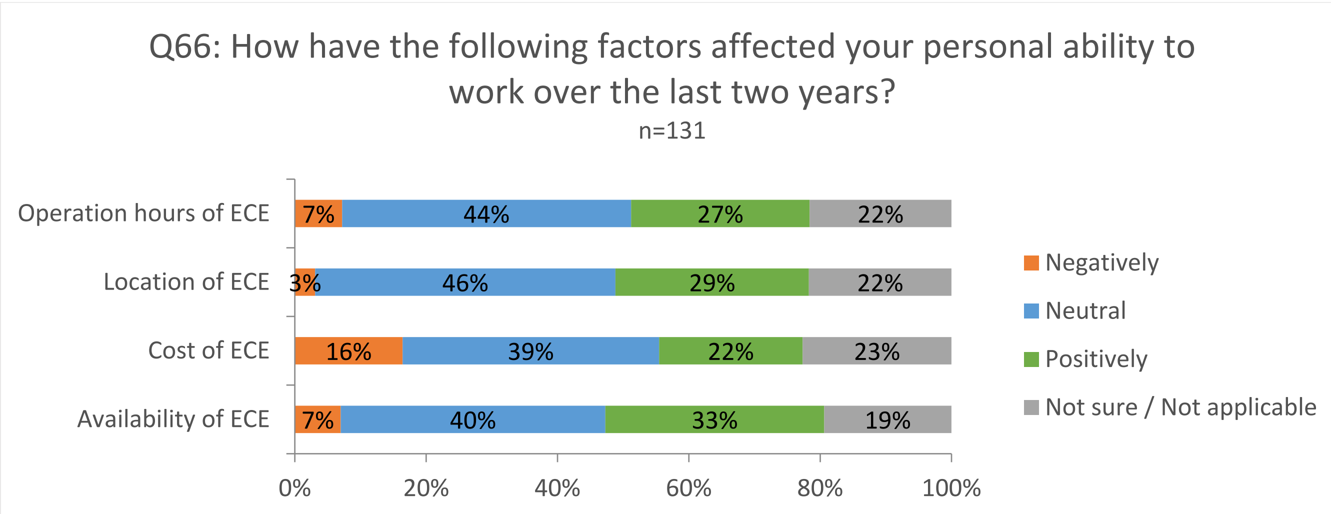
This section summarizes questions related to the importance of ECE for employees and businesses.

Impact of ECE on Respondents with Children

Of survey respondents, 38% had children aged 0 to 12 years old.[79] Overall, respondents rated the impact of ECE on their ability to work positively. Only 16% mentioned that the cost of ECE had a negative effect on them. Operations, including operation hours and the availability of ECE, received lower negative scores of 7% (see **Exhibit III-31**). Below are some quotes from survey respondents to the open-ended question about how they have been impacted by ECE.

[79] Question 65 (n=364).

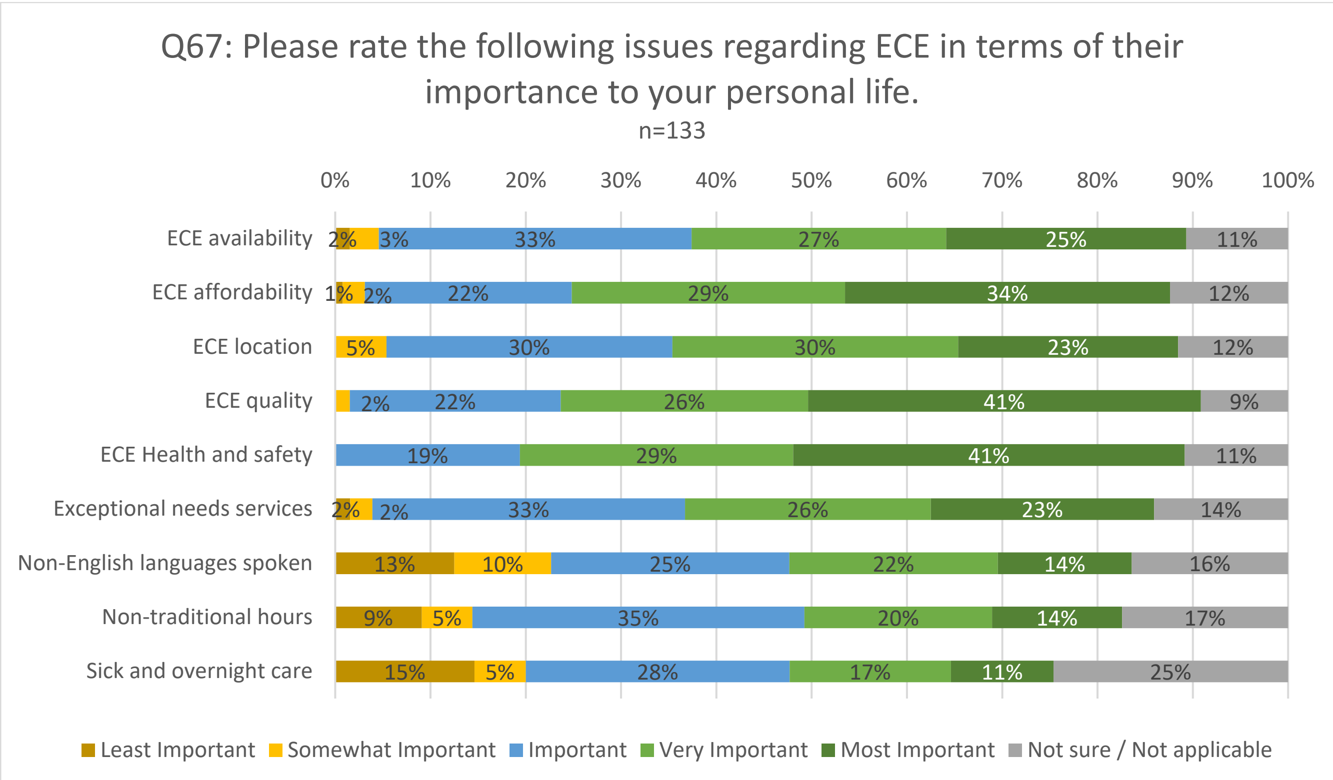
Exhibit III-31



"Two children attend private school that offers extended care. One child attends in-home day care. Total cost for three is expensive."
"I am a foster parent, but I also work. It is very difficult to find ECE for young children, which often prevents me from taking in children who I could otherwise serve."
"I paid for private ECE preschool for both of my children, my husband and I didn't qualify for other programs, but my children thrived, and it was worth every penny."
Survey Respondent Comments

When parents were asked to rate the importance of certain aspects of ECE, health and safety received the highest score, with 70% considering it either "very important" or "most important". This was followed by ECE quality at 67% and affordability at 63%. The least important aspects were sick and overnight care at 15%, and non-English languages spoken by ECE providers at 13% (see **Exhibit III-32**).

Exhibit III-32



Impact of ECE on Businesses

Respondents who were employers outside of the ECE sector were asked to rate the importance of the impact of different aspects of ECE on their employees. They rated the cost and availability of ECE equally as having negatively impacted their employees at 22%. The location and operating hours of ECE received equal amounts of positive ratings at 13% (see **Exhibit III-33**).

Employers rated the affordability of ECE as the most important factor at 43%, followed by availability and quality, both at 39%. The availability of non-traditional hours for ECE care and ECE providers speaking non-English languages were equally regarded as least important, each at 9% (see **Exhibit III-34**).

Exhibit III-33

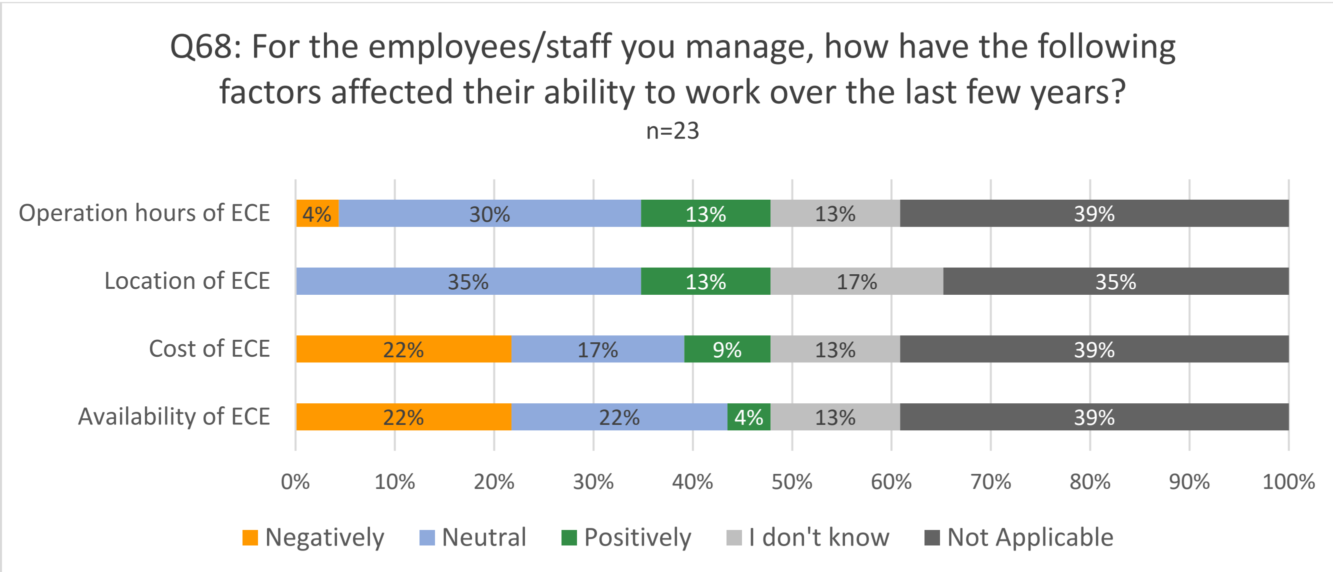
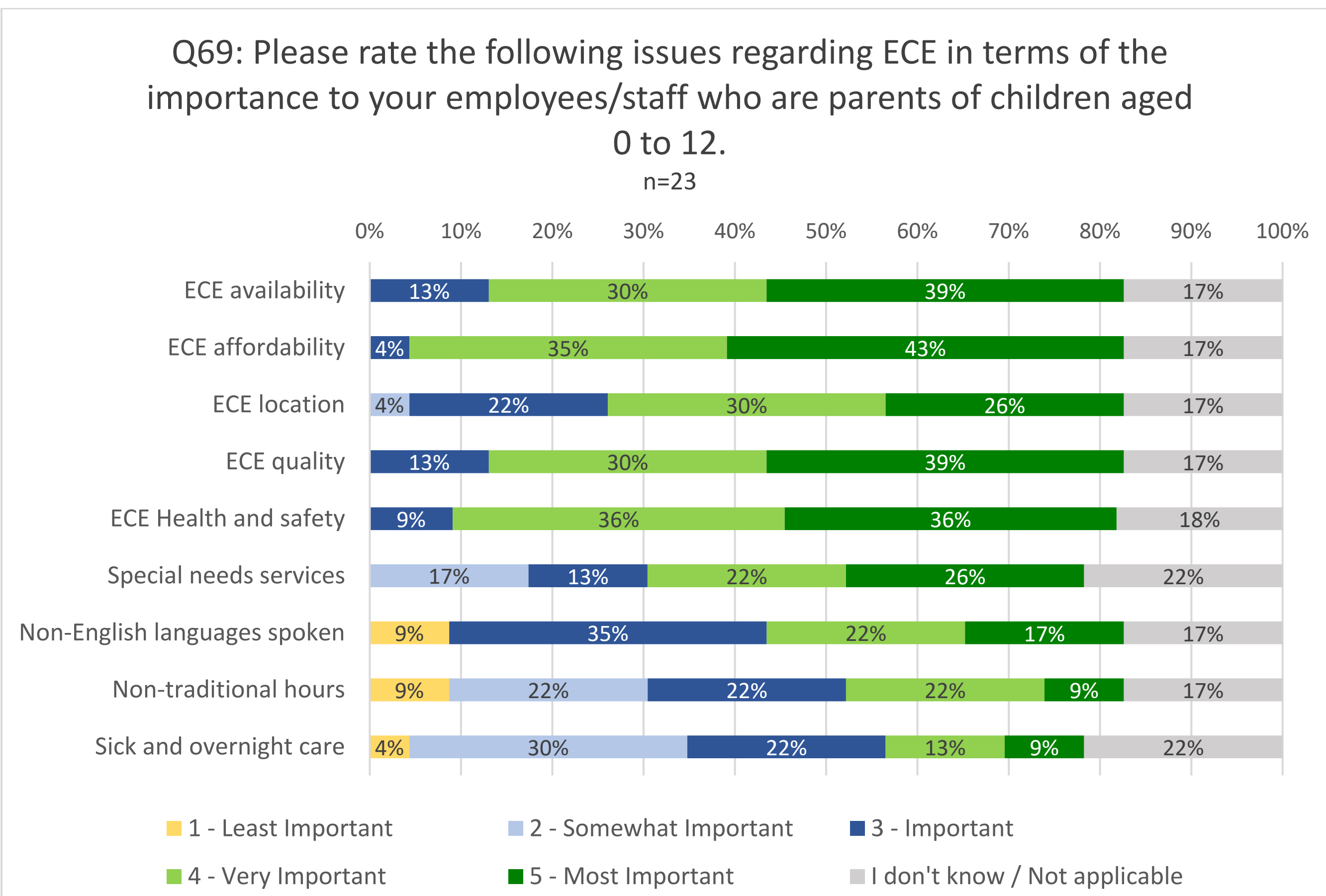


Exhibit III-34



III.5 Opportunities in ECE

The survey included questions that assessed respondents' interest in expanding, input on the goals of the Strategic Plan, and inquired about possible ideas for action items. The following section summarizes relevant questions related to potential future opportunities to strengthen and expand the ECE field in Riverside County.

Expanding ECE Facilities

The survey included several questions designed to identify sites for new or expanded ECE facilities. In total, 16% of respondents indicated being aware of vacant land, buildings, business parks, or other potential sites for new ECE facilities.[80] Some provided more details and agreed to be contacted. The detailed answers to these questions will be shared with the local LPC to further evaluate these sites.

There was also a significant number of ECE providers who would like to expand their facility or capacity to serve more children; 97 respondents, or 65%, were interested in expanding their program.[81] **Table III-8** provides a detailed overview by program type of respondents interested in expanding. The majority were either small or large FCC owners, or 84%. However, there were also 13 private ECE centers, one faith-based ECE center, one Early Head Start program, and one school district program interested in expanding.

Table III-8
Providers' Interest in Expansion - Q15
Riverside County Needs Assessment - 2025

ECE Program Type	Yes	No	Not sure	Total n
Early Head Start / Head Start	1	-	1	2
Faith-based ECE center	1	-	-	1
Small Family Child Care Home	25	8	3	36
Large Family Child Care Home	56	13	12	81
Private, for-profit or non-profit ECE center	13	5	10	28
School district program (including TK and before- and after-school programs)	1	-	-	1
Total	**97**	**26**	**26**	**149**

Total n for this question is 149.
Source: Brion Economics, Inc.

[80] Question 81 (n=327).
[81] Question 15 (n=149).

Of these, 81% were interested in adding Preschool spaces, 74% in adding spaces for Infants/Toddlers, and 45% in providing before- and after-school care. The number of spaces providers want to add totals 1,197, showing future potential for ECE growth in the County. **Table III-9** provides more details and the exact numbers of spaces by age group that providers wish to add. Providers' timelines for expansion are in the near future, with 43% wishing to expand within a year and another 28% in one to two years.[82]

Table III-9
Potential New Capacity of Spaces - Q16
Riverside County Needs Assessment - 2025

Age Group	% of Respondents Wanting to Add Spaces	Total # of Spaces Providers Want to Add
Infants/Toddlers (ages 0 up to 3)	74%	316
Preschool (ages 3 to 5, not TK)	81%	515
Wrap-around care for TK children	43%	169
Before/after-school (ages 5 to 12)	45%	197
Total Capacity		**1,197**

Total n for this question is 89.
Source: Brion Economics, Inc.

Providers mostly wanted to expand at their current location (52%) or at a new, still unknown location (28%). Five respondents had already identified their new location.[83] **Table III-10** provides additional details on how providers want to expand their programs by program type. About 42% of respondents are interested in opening a new ECE center, 33% would like to partner with the school district to offer wrap-around care, and 30% want to expand from a small to a large FCC. Overall, 31 current FCC owners are interested in opening an ECE center. Private centers mostly aim to expand the capacity of their current ECE programs at their locations.

Businesses Providing ECE-Related Benefits

Respondents who were not from the ECE sector itself were asked whether their business, agency, or organization currently provides ECE-related benefits. Only 17% affirmed this, indicating a potential for more businesses to offer these kinds of benefits.[84] The benefits most likely to be implemented include paid family leave at 44%, priority placement on waitlists for employees at 28%, and offering dependent care flexible spending accounts to employees at 28% (see **Exhibit III-35**).

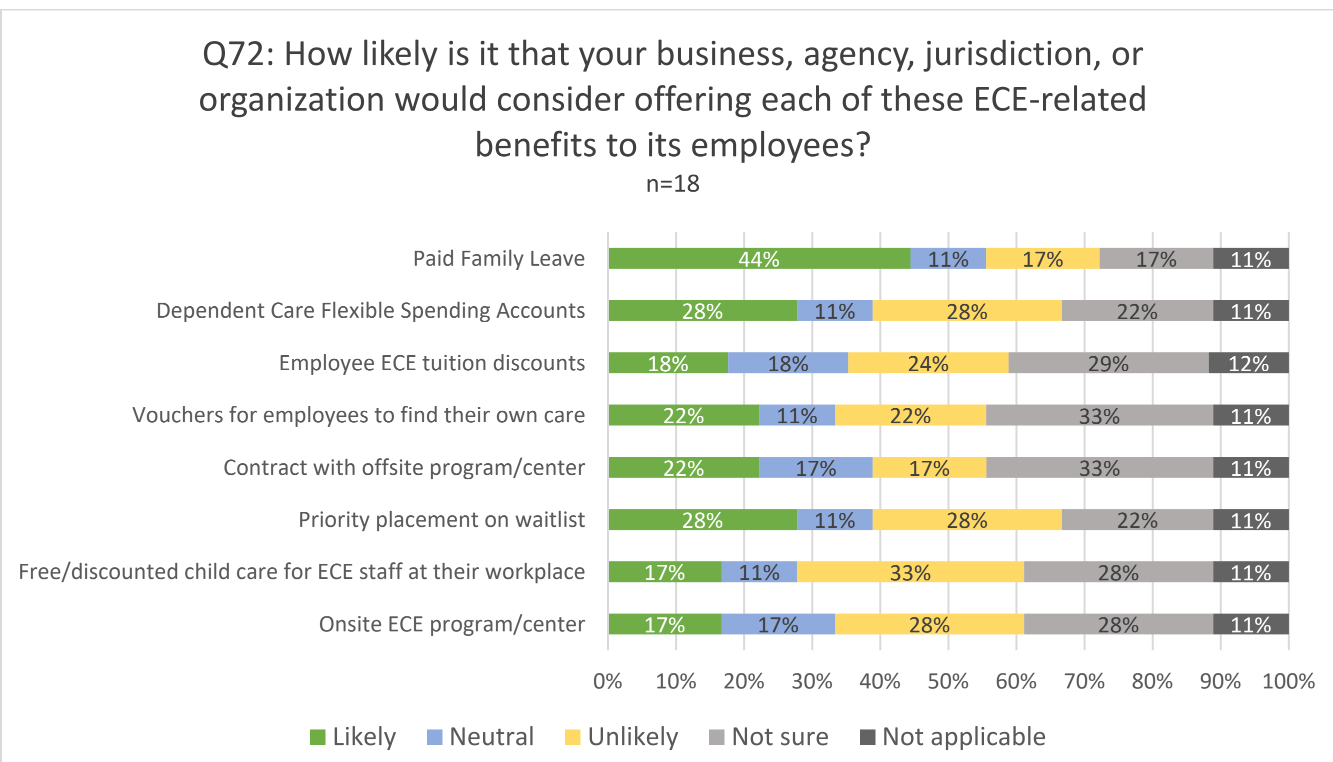
[82] Question 17 (n=93).
[83] Question 19 (n=93).
[84] Question 70 (n=23).

Table III-10
Desired Expansion by Program Type - Q18
Riverside County Needs Assessment - 2025

	(Early) Head Start	Small FCC	Large FCC	Private ECE center	School district program	Total
Expand from a small FCC to a large FCC	-	19	6	-	-	**25**
Develop a new FCC in addition to the current one	-	1	13	-	-	**14**
Open a new child care center	-	1	30	4	-	**35**
Expand the capacity at the current ECE program location	1	-	-	10	1	**12**
Partner with school district to provide wrap-around care for TK children	-	5	19	3	-	**27**
Provide wrap-around care for TK children on school campus	-	-	-	-	-	**-**
Totals	**1**	**26**	**68**	**17**	**1**	

Total n for this question is 83.
Source: Brion Economics, Inc.

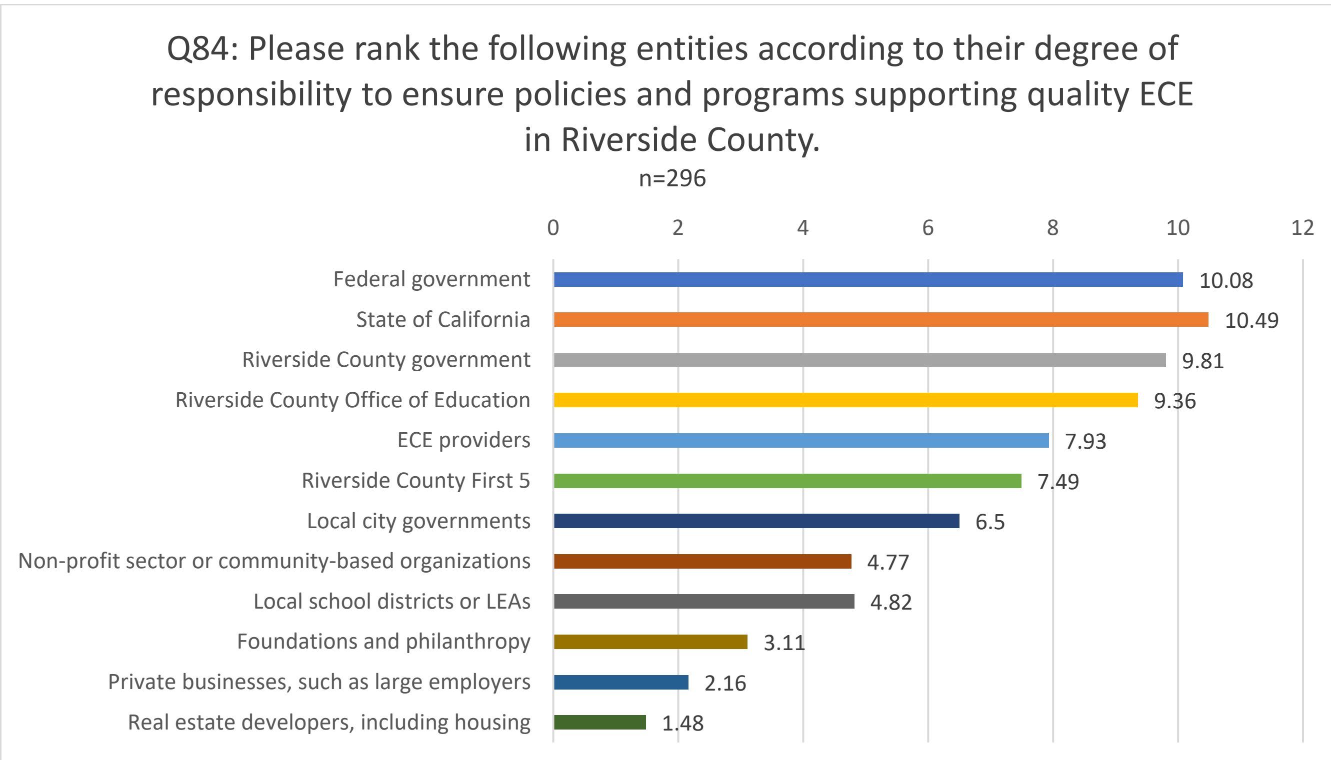
Exhibit III-35



Policy Goals, Responsible Stakeholders, and Policy Ideas

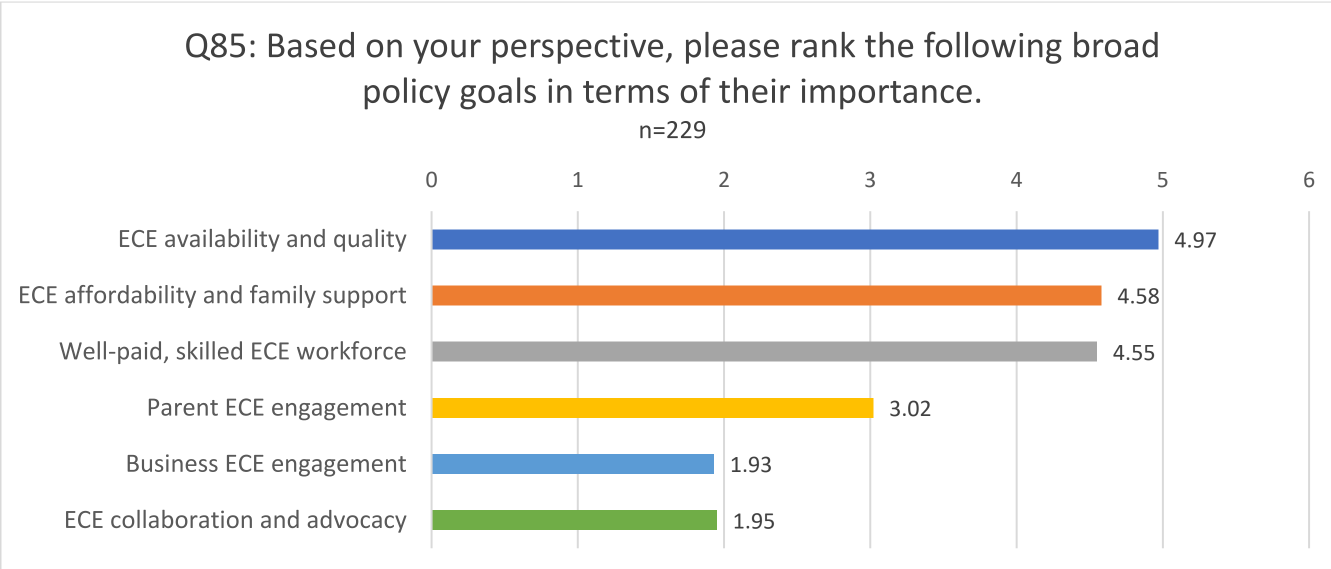
Survey respondents generally viewed the responsibility for ensuring policies and programs that support quality ECE in Riverside County as shared among government actors, with the State of California ranked first, followed by the federal government as second, and the Riverside County government as third (see **Exhibit III-36**).

Exhibit III-36



When asked to rank the different policy goals in the order of their importance, ECE availability and quality received the highest count in rank 1 (most important) and 2 (a total of 72%), ECE affordability and family support ranked second with 58% of respondents assigning it either the first or second rank, and a well-paid and skilled ECE workforce ranked third (46%). Some viewed ECE collaboration and advocacy as the most important (3%), more than business engagement in ECE, but it was ranked the most often last (54% for rank 6 out of 6; see **Exhibit III-37**).

Exhibit III-37[85]



The Strategic Plan, simultaneously prepared by BEI for the Riverside LPC, includes some of the comments and reactions of respondents when asked for their policy ideas, organized by the five Focus Areas of the Strategic Plan, regarding the broad policy areas mentioned above.[86]

[85] For this graph, rankings were transformed into points and a combined score for each goal calculated. The highest possible score would be 6, the lowest 1.
[86] Question 86 (n=77).

IV. ECE Needs Assessment

In California, Local Planning Councils are required to complete a Child Care Needs Assessment every five years. The California Department of Social Services (CDSS) provides a template for the Needs Assessment that is included as **Appendix E** in this report. The template provides a consistent Needs Assessment framework for LPCs across the State to address issues such as the affordability of care and access to subsidies, child demographics and special needs, ECE facilities, ECE workforce, and ECE quality. This chapter seeks to contextualize the data provided in the template in **Appendix E**. This chapter also draws upon the ECE Supply and Demand analysis in **Chapter II** and the ECE Online Survey Results in **Chapter III**. **Appendices C** and **D** include the online survey instrument and full results that are referenced in this chapter. Data reported in the template and in this chapter are presented at the County level and pertain to the ECE needs of infants, toddlers, preschoolers, and school-age children.

IV.1 Child Population, Language, and Ethnicity

The following section summarizes data on the number of children in Riverside County, and their race/ethnicity and language. This section can be cross-referenced with **Appendix E-2, E-5,** and **E-6.**

Child Population

In **Chapter II**, the population of children ages 0 to 12 years old is estimated at 411,440, or 15.9%, of the County population in 2025 (see **Table II-4**). The number of children 0 to 4 years old is 141,522. The demographic data used in **Chapter II** is based on data from SCAG, ELNAT and DOF and estimates of children as a percent of population from DOF (see **Chapter II** for more discussion of demographic data and methodology).

Child Language, Race, and Ethnicity

Public school enrollment data for students in Riverside County can be used as a proxy for the languages of children ages 0 to 5 years old. In 2024-25, 15.6% of students enrolled in TK and K were classified as English Learners.[87] Among these students, 88.8% speak Spanish, followed by Mandarin (2.9%), Arabic (1.4%), and Vietnamese (1.0%).[88] In the ECE Online Survey (described in **Chapter III**), ECE providers were asked about the languages spoken by children in their programs. Most children speak English (72.4%). The next most prevalent language is Spanish

[87] California Department of Education, Dataquest, 2024-25 Enrollment by English Language Acquisition Status (ELAS) and Grade – Riverside County.
[88] California Department of Education, Dataquest, 2024-25 English Learner Students by Language by Grade – Riverside County.

(25.2%), which is similar to the data from TK/K students. **Table IV-1** shows all of the responses to the language question in the survey.

Table IV-1
Languages Spoken by Children - ECE Survey Results - Q22
Riverside County Needs Assessment - 2025

Language	Total # of Children	% Distribution
English	3,435	72.4%
Spanish	1,193	25.2%
Mandarin	28	0.6%
Arabic	25	0.5%
Vietnamese	15	0.3%
Philippine languages (Filipino, Tagalog, etc.)	12	0.3%
Telugu	7	0.1%
Other languages	26	0.5%
Total	**4,742**	**100.0%**

Based on results from Q22; n = 135.

Table IV-2 shows the percentage of children ages birth to 4 years old in each race/ethnicity category. The majority of children are either Hispanic (61.7%) or White (24.0%).

Table IV-2
Child Race/Ethnicity, Riverside County
Riverside County Needs Assessment - 2025

Race/Ethnicity	Percentage of Children Ages 0 to 4 Years Old
Hispanic	61.7%
White	24.0%
Black or African American	5.4%
Two or more races	4.2%
Asian	3.0%
Filipino	1.2%
American Indian	0.3%
Alaska Native	0.0%
Other	0.3%

Source: California Early Learning Needs Assessment Reports, American Institutes for Research, https://reports.elneedsassessment.org/LPCReports.aspx.
Sarah Kinahan Consulting; Brion Economics, Inc.

IV.2 Family Employment Status, Income, and Public Assistance

Factors such as family income and employment status impact a family's need for and ability to access ECE services. The following section summarizes data on families' labor force participation, the need for care during nontraditional hours, family income, and use of public assistance. This section can be cross-referenced with **Appendix E-9, E-10, E-11,** and **E-14**.

For children under 6, close to two-thirds (63.6%) have all parents working in the labor force.[89] See **Table II-4** for the estimated number of children in working families by age group.

Families who work during the evening, overnight, or on weekends need care outside of traditional child care hours. During the six-month period from November 1, 2024, to April 30, 2025, the R&R for Riverside County received 13,229 referral requests. As shown in **Table IV-3**, twelve percent of these requests were for nontraditional hours – evening, overnight, or weekend care.

Table IV-3
Requests for Care During Nontraditional Hours, Riverside County
Riverside County Needs Assessment - 2025

Schedule	Number of Requests
Evening	318
Overnight	143
Weekends	1,179
Total Nontraditional Hours	**1,640**
Total Referral Requests	13,229
Nontraditional Requests as Percent of Total	**12%**

Source: Riverside County Office of Education, Resource and Referral Department, CD 2504-Service Data Report for 11/01/2024 to 04/30/2025.

Sarah Kinahan Consulting; Brion Economics, Inc.

Families are more likely to find care during nontraditional hours with a Family Child Care provider (FCC), rather than a center-based provider. According to the *2023 California Child Care Portfolio*, 6% of centers and 36% of FCCs in Riverside County offer evening, weekend, or overnight care.[90]

[89] U.S. Census Bureau, U.S. Department of Commerce. "Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents." American Community Survey, ACS 5-Year Estimates Detailed Tables, Table B23008, 2023.
[90] California Child Care Resource and Referral Network, 2023 California Child Care Portfolio, https://rrnetwork.org/research/child_care_portfolio.

In addition to requests for nontraditional hours, the R&R also receives requests from families seeking drop-in or flexible care. Eight percent of referral requests were for these types of schedules.[91]

In Riverside County, the median family income is $100,461. This is 9% less than the statewide median income for families of $110,108.[92] Among families[93] with children under age 5, 9.8% live below the Federal Poverty Level.[94] Among children under age 5, 14% are in households with incomes below the Federal Poverty Line.[95]

Table IV-4 summarizes the number of children under 5 years old receiving Medi-Cal, CalFRESH, and CalWORKs as of August 2025.[96] As shown, a total of 106,081 children under 5 years olds receive services from these three programs.

Table IV-4
Children Under 5 Years Old Receiving Self-Sufficiency Services, August 2025
Riverside County Needs Assessment - 2025

Service	Number of Children
Medi-Cal	63,382
CalFRESH	33,081
CalWORKs	9,618
All Programs Combined	**106,081**

Source: Riverside County Department of Public Social Services, shared via email from First 5 Riverside County, September 25, 2025.
Sarah Kinahan Consulting; Brion Economics, Inc.

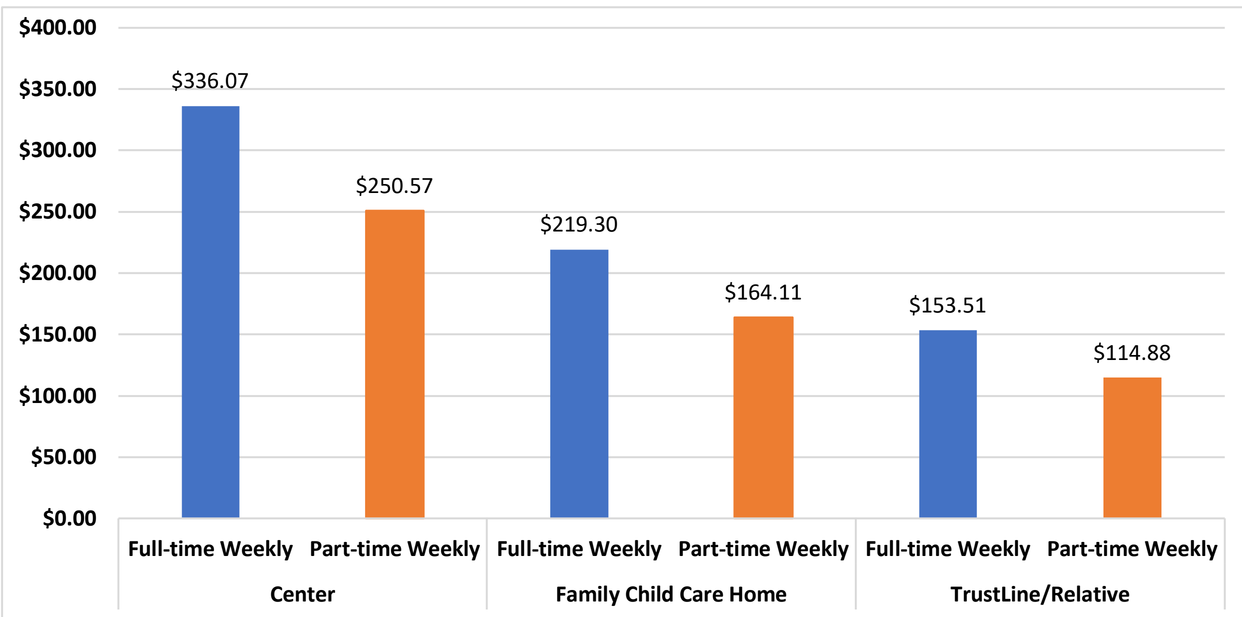
IV.3 Affordability and Cost

The following section summarizes data on the rates for subsidized child care, the cost of care for families in the private market, and the affordability of care and can be cross-referenced with **Appendix E-2**.

[91] Riverside County Office of Education, Resource and Referral Department, CD 2504- Service Data Report for 11/01/2024 to 04/30/2025.
[92] American Community Survey, S1901: Income in the Past 12 Months (in 2023 Inflation-Adjusted Dollars), 2023 5-Year Estimates.
[93] The U.S. Census Bureau defines a family as two or more people related by birth, marriage, or adoption who reside together. A family household specifically refers to a household maintained by a householder who is in a family, including any related subfamily members. In essence, the Census Bureau focuses on relatedness when defining a family, distinguishing it from a household, which can include unrelated individuals.
[94] American Community Survey, S1702: Poverty Status in the Past 12 Months of Families, 2023 5-Year Estimates.
[95] American Community Survey, S1701: Poverty Status in the Past 12 Months, 2023 5-Year Estimates.
[96] Riverside County Department of Public Social Services, shared via email from First 5 Riverside County, September 25, 2025.

One measure of the cost of ECE is the *Regional Market Rate Survey* that was conducted by the California Department of Education in 2018. This survey was used in 2022 to set maximum reimbursement rates (MRRs) **for subsidized ECE** at the 75th percentile of the 2018 Regional Market Rate survey or the Regional Market Rate ceilings as they existed on December 31, 2021, whichever is greater.[97] MRRs have not been updated since they were set in 2022, however, the State will implement a new rate setting methodology in FY 2025-26. The MRRs for full-time weekly care in Riverside County range from $121 to $336, depending on the ECE setting (center, Family Child Care, or TrustLine/relative) and the age of the child (birth to 24 months, 2 through 5 years, and School Age). The MRRs for part-time weekly care range from $94 to $251. **Exhibits IV-1, IV-2, and IV-3** show the weekly rates for birth to 24 months, 2 through 5 years, and School Age by schedule and ECE setting.

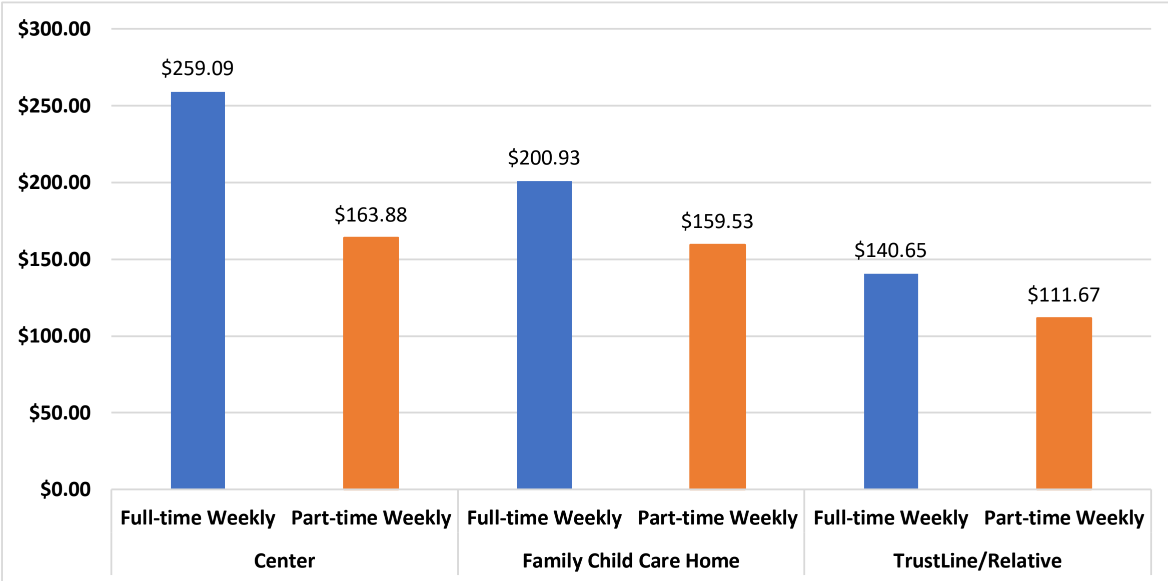
Exhibit IV-1
Maximum Reimbursement Rates for Birth to 24 Months, Riverside County
Riverside County Needs Assessment - 2025



Source: California Department of Social Services, retrieved from https://rcscc.adm.dss.ca.gov/index.aspx on 05-14-25.
Sarah Kinahan Consulting, Brion Economics, Inc.

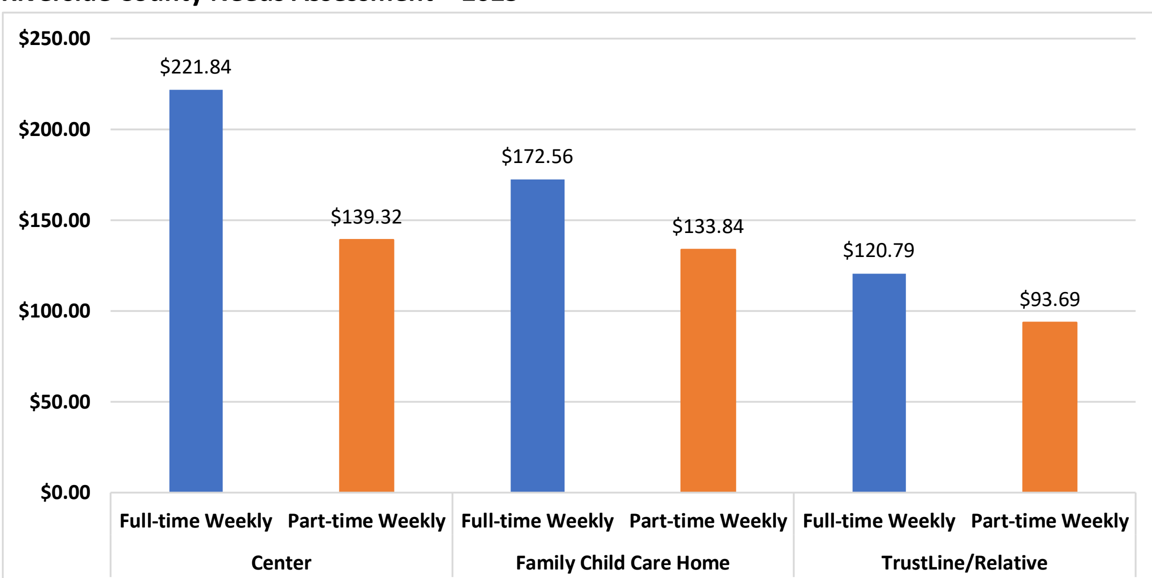
[97] California Department of Social Services, Reimbursement Ceilings for Subsidized Care, Effective January 1, 2022. Retrieved from https://rcscc.adm.dss.ca.gov/index.aspx on June 12, 2025.

Exhibit IV-2
Maximum Reimbursement Rates for 2 through 5 Years, Riverside County
Riverside County Needs Assessment - 2025



Source: California Department of Social Services, retrieved from https://rcscc.adm.dss.ca.gov/index.aspx on 05-14-25.
Sarah Kinahan Consulting, Brion Economics, Inc.

Exhibit IV-3
Maximum Reimbursement Rates for School Age, Riverside County
Riverside County Needs Assessment - 2025



Source: California Department of Social Services, retrieved from https://rcscc.adm.dss.ca.gov/index.aspx on 05-14-25.
Sarah Kinahan Consulting, Brion Economics, Inc.

The National Database of Childcare Prices (NDCP), sponsored by the US Department of Labor's Women's Bureau, provides a more recent assessment of ECE prices in the private pay market at the county level.[98] Their County Factsheets provide 2022 prices and 2024 inflation-adjusted prices, which are the latest available data.[99] **Table IV-5** shows the 2024 inflation-adjusted prices for ECE services by age of child and ECE setting in Riverside County.

Table IV-5
ECE Prices in Riverside County - 2024
Riverside County Needs Assessment - 2025

	Center-based		Home-based	
Age	**Weekly**	**Annual**	**Weekly**	**Annual**
Infant	$449	$23,337	$256	$13,331
Toddler	$264	$13,734	$239	$12,424
Preschool	$209	$10,884	$226	$11,760
School Age	$120	$6,221	$199	$10,338

Source: National Database of Childcare Prices, US Department of Labor's Women's Bureau, 2024 inflation-adjusted prices, retrived from https://public.tableau.com/app/profile/women.s.bureau.department.of.labor/viz/CountyFactsheets/Childcareinthecounties.
Sarah Kinahan Consulting, Brion Economics, Inc.

According to the National Database for Childcare Prices, ECE makes up a significant share of median family income, as shown in **Table IV-6**.

98 U.S. Department of Labor, Women's Bureau, County Factsheets, The Price of Child Care by County. Retrieved from https://public.tableau.com/app/profile/women.s.bureau.department.of.labor/viz/CountyFactsheets/Childcareinthecounties on June 12, 2025.

99 The NDCP uses the Consumer Price Index (CPI) Methodology Description Inflation Calculator, found at https://data.bls.gov/cgi-bin/cpicalc.pl, to calculate 2024 inflation-adjusted prices.

Table IV-6
Price of Care as Share of Median Family Income
Riverside County Needs Assessment - 2025

Age	Center-based	Home-based
Infant	22.1%	12.6%
Toddler	13.0%	11.8%
Preschool	10.3%	11.1%
School Age	5.9%	9.8%

Source: National Database of Childcare Prices, US Department of Labor's Women's Bureau, https://public.tableau.com/app/profile/women.s.bureau.department.of.labor/viz/CountyFactsheets/Childcareinthecounties.

Sarah Kinahan Consulting; Brion Economics, Inc.

The US Department of Health and Human Services (DHHS) recommends that ECE should not exceed 7% of family income. Given current ECE costs, many families in Riverside County are spending far more than what DHHS considers "affordable," especially if they have more than one child.[100]

IV.4 Subsidized Care

In Riverside County, free or low-cost ECE is offered through several State and federal contracts. In addition, age-eligible children can now access free Transitional Kindergarten (TK) through the public schools. This section can be cross-referenced with **Appendix E-3** and **E-4**.

The Riverside County Local Planning Council updated their Zip Code Priorities in May 2024 using primarily ELNAT data from 2020. This Needs Assessment updates the supply of subsidized care at the County level using the most recent available information on funding levels and enrollment counts from the California Department of Education, California Department of Social Services, and the Office of Head Start, and includes newer programs like TK and ELOP.[101] **Table IV-7** summarizes the available supply of spaces by age group and program type. The total subsidized supply is 141,639 spaces.

Table IV-8 compares the number of eligible children, by age group, to the availability of subsidized care. The total estimated need for subsidized ECE for children ages 0 to 12 in families who are income-eligible is 276,475 spaces[102] and the available supply is 141,639 spaces. This results in **an unmet need of 134,837 subsidized spaces**

[100] L. K. Smith, M. Suenaga, M. Campbell, Bipartisan Policy Center, Demystifying Child Care Affordability, August 31, 2020. Retrieved from https://bipartisanpolicy.org/blog/demystifying-child-care-affordability/ on June 12, 2025.
[101] Note the estimate of ELOP spaces assumes that funding from ASES/21st Century programs, where available, is used to support these same spaces instead of funding separate programs.
[102] 2024-25 Zip Code Priorities Report for Riverside County.

with 49% of eligible children ages 0 to 12 lacking access to a subsidized space. The supply gaps vary greatly based on the age groups of children. For Infants/Toddlers (under age 3), there is an unmet need of 45,279 spaces, with 91% of children not being served. For Preschoolers (ages 3 to 4), there is a need for 22,561 additional subsidized spaces, and 47% do not have access to a subsidized space. Lastly, for School Age (ages 5 to 12), the unmet need is 66,997 spaces, with 38% not being served. The analysis of the need for subsidized care and the estimated shortages is different than the overall supply and demand analysis presented in **Chapter II**. While there may be available spaces estimated in **Chapter II**, they may not be affordable to all families. The analysis here focused on whether there is enough subsidized care relative to those children that are eligible for subsidized care. The overall supply and demand analysis compares the availability of spaces irrespective of cost to the estimate of demand or need for such care.

Table IV-7
Subsidized ECE Spaces by Program and Age Group
Riverside County Needs Assessment - 2025

Subsidy Program	Total Available Supply of Spaces				Percent of Total
	Infants / Toddlers	Preschool	School Age	Total 0-12 Years	
CA State Preschool (CSPP) Full-Time and Part-Time (1)	-	7,476	-	**7,476**	5.3%
General Child Care and Development Programs (CCTR) (2)	1,869	400	1,524	**3,793**	2.7%
CalWORKs Stage 1 (3)	610	573	1,339	**2,522**	1.8%
CalWORKs Stage 2 and 3 (4)	446	770	2,373	**3,589**	2.5%
California Alternative Payment Program (CAPP) (4)	1,306	1,459	2,386	**5,151**	3.6%
Migrant Programs (CMIG and Migrant Head Start) (5)	373	394	-	**767**	0.5%
Head Start (6)	-	2,518	-	**2,518**	1.8%
Early Head Start (7)	112	-	-	**112**	0.1%
Transitional Kindergarten (TK) (8)	-	11,934	-	**11,934**	8.4%
ELO-P/ASES/21st Century (8)	-	-	103,777	**103,777**	73.3%
Totals	**4,717**	**25,523**	**111,399**	**141,639**	**100.0%**
Percent of Totals	3.3%	18.0%	78.7%	100.0%	

Note not all subsidized programs serve all age groups.

(1) California Department of Education, CATS Combined Report, County Sort, March 2025. Spaces estimated based on contract amount, minimum days of operation, and daily rate.

(2) California Department of Social Services, CATS Contract Report FY2024. Spaces estimated based on contract amounts, minimum days of operation and daily rate, as well as licensed capacity by age group.

(3) California Department of Social Services, Child Care CalWORKs Families Monthly Report (CW 115), October 2024.

(4) Consortium for Early Learning Services, Zip Code Priorities Report 2024-25. Report uses AIR Data (2020).

(5) Office of Head Start, Migrant and Seasonal Services Head Start Services Snapshot, Riverside County Office of Education (2023-24).

(6) Office of Head Start, Head Start Services Snapshot, Riverside County Office of Education (2023-24).

(7) Office of Head Start, Early Head Start Services Snapshot, Riverside County Office of Education (2023-24).

(8) Brion Economics, ECE Needs Assessment - Riverside County, 2025, Table II-10.

Sources: 2024-25 Zip Code Priorities Report for Riverside County; California Department of Education; California Department of Social Services; Riverside Resource & Referral Agency; Office of Head Start; Sarah Kinahan Consulting; Brion Economics, Inc.

Table IV-8
Subsidized Care and Unserved Children - 2025 Estimates, Riverside County
Riverside County Needs Assessment - 2025

Age Group	Number of Eligible Children (Family Income 85% SMI) - 2025 (1)	Number of Children Served - 2025	Number of Unserved Children	Percent of Children Unserved
Infant/Toddler (Under 3)	49,995	4,717	(45,279)	91%
Preschool (3 to 4 Years)	48,084	25,523	(22,561)	47%
School Age (5 to 12 Years)	178,396	111,399	(66,997)	38%
Total	**276,475**	**141,639**	**(134,837)**	49%

(1) The estimate of the number of children that are eligible for subsidized care is based on the ratio of children that are eligible from 2020, based on ELNAT data, and applied to the estimate of children for 2025 by age group; see Appendix A-Table A-6.

Source: 2024-25 Zip Code Priorities Report for Riverside County; Sarah Kinahan Consulting; Brion Economics, Inc.

State funding for a Centralized Eligibility List ended many years ago. The RCOE maintains an Eligibility List (EL) for the Alternative Payment Program (APP), which it administers. In addition, any CDSS or CDE-funded program that wishes to utilize the EL as their waitlist may do so. RCOE has been actively enrolling all income-eligible families in the APP from the EL since 2020. Since this time, families at all eligible ranks are pulled, exhausting the EL every four-to-six weeks. Due to the constant enrollment process, the number of children on the eligibility list is constantly changing, and an estimate is not available at this time.

Another source of information on waiting lists was collected in the ECE Online Survey (see **Chapter III**). In the ECE Online Survey, 38% of ECE providers reported having a waitlist for their ECE program.[103] **Table IV-9** provides the total number of children on waitlists by age group. Among survey respondents, there were 1,105 children on waitlists – note children can be duplicated on more than one waitlist. Among programs with waitlists, the average number of children on the waitlist was 21. Most of the children on waitlists were infants or toddlers (a combined 52% of children on waitlists). It should be noted that the ECE Online Survey data is self-reported and only includes a subset of ECE programs in Riverside County.

[103] Question 13 (n= 150).

Table IV-9
Number of Children on Waitlist - ECE Survey Results - Q14
Riverside County Needs Assessment - 2025

Age Group	Total # of Children on Waitlist	% Distribution	Average # of Children on Waitlist
Infants (ages 0 up to 18 months)	264	23.9%	6
Toddlers (ages 18 months up to 3)	309	28.0%	9
Preschool (ages 3 to 5)	368	33.3%	12
Wrap-around care for TK children	36	3.3%	3
Before/after-school (ages 5 to 12)	128	11.6%	7
Total (all age groups)	**1,105**		**21.3**

Based on results from Q14; n = 52.

Source: Brion Economics, Inc.

IV.5 Access and Quality

The following section summarizes data on access to ECE and quality improvement efforts in Riverside County and can be cross-referenced with **Appendix E-3, E-15, E-16,** and **E-17**.

Access

The Local Planning Council annually updates the zip code priorities for state-funded preschool and ECE. The zip codes priorities represent the areas with the greatest gaps between the number of subsidy-eligible children and subsidized supply. Several organizations are working to improve access in the County, and the zip code priorities are available to them as one tool for determining and addressing the highest-need geographic areas. To further aid in planning and programming efforts, a regional supply and demand analysis was prepared as part of this Riverside County Needs Assessment - 2025. Efforts to increase access are described below.

One program working on improving access and quality is the Child Care Initiative Project (CCIP) at the RCOE. CCIP provides training, coaching, and incentives to help individuals who are interested in opening their own Family Child Care Home. CCIP provided 25 hours of training in English and Spanish to those interested in becoming licensed and licensed FCC providers wanting to expand to a large FCC license. Since July 1, 2024, there have been 157 graduates from CCIP. Through conversations with CCIP participants, RCOE found that the biggest obstacle to becoming licensed was having funds available to support their work until they had enough children in care to see a profit. RCOE was able to leverage funding through the Congressionally Funded Community Project for district CA-36, Raul

Ruiz, to provide stipends to increase ECE capacity in that congressional district. To support increasing ECE capacity in the rest of the County, RCOE utilized Quality Counts California, Quality Improvement (QCC QI) funding to provide similar stipends. Through this layered support in conjunction with CCIP, RCOE distributed 199 stipends to increase ECE capacity in the County by 1,522 slots.[104]

In a continued effort to increase the amount of quality ECE spaces in Riverside County, RCOE has created intentional outreach efforts to current FFN providers serving the subsidized ECE program. Personalized outreach through email, phone calls, and virtual meetings targets areas of high concentration of FFN providers. The FFN providers are informed of services and supports they can receive, invited to CCIP, informed about technical assistance office hours, and offered registration information to upcoming professional development opportunities. FFNs as part of this targeted outreach not only have personalized support; they also have their progress tracked on their path to becoming licensed and beyond.

As described in **Chapter III**, Brion Economics conducted an ECE Online Survey to inform the Needs Assessment and Strategic Plan. The survey included questions to gauge the potential for expansion to meet ECE shortages in the County. Of those who answered the question, 65% expressed interest in expanding their ECE program or facility.[105]

Quality

In Riverside County, three entities oversee and implement various aspects of Quality Counts, known locally as Quality Start, and related quality improvement efforts. Quality Start Riverside County, the Quality Rating and Improvement System for the County, is operated by First 5 Riverside County and the RCOE. CELS oversees the Quality Counts California Workforce Pathways Stipend Program (QCC WPSP), which gives financial stipends to early childhood educators for completing trainings and college courses and obtaining permits and degrees.

Quality Start

Quality Start Riverside County, operated by First 5 Riverside County and RCOE, is the Quality Rating and Improvement System for the County. Quality Start serves a variety of ECE programs and offers ratings (for CSPP programs only), continuous quality improvement support, coaching, and professional development. The emphasis of the program is on continuous quality improvement, rather than ratings. A total of 448 licensed ECE providers are participating in Quality Start Riverside County (QSRC). In addition, 147 CSPP programs are participating, with

[104] Riverside County Office of Education, email from Jill Johnson, May 9, 2025.
[105] Question 15 (n = 149).

137 CSPP sites rated at 4 or 5. Ten CSPP sites are projected to be rated in program year 2025-2026. In addition, two license-exempt and 17 alternative sites participate in QSRC.[106]

Professional Development Offered by the Resource and Referral (R&R) Agency

The R&R Agency at RCOE provides professional development to all potential providers, FCC providers, ECE center staff, and UPK professionals. Participants can access training through the Passport Professional Development Program as well as attend Quality Early Learning Services Symposiums. Professional Development topics are designed to support quality learning environments and are often paired with additional Communities of Practice or technical support. Quality Early Learning Services Symposiums were created based on feedback from the early education community who did not want to miss out on any learning opportunities (breakout sessions) that often happen at traditional conferences. At each Symposium, participants are placed in a cohort, and all learning sessions are repeated so every cohort rotates through every session. Passport Professional Development topics include Trauma-Informed Care, Social Emotional Learning Foundations, Play-Based Learning, Outdoor Classroom, Early Literacy, and Early Math/STEAM. Quality Early Learning Services Symposium themes have been on Business Practices, Working with Foster Children and Resource Families, Leadership, and Early Literacy for All Children. For the 2024-2025 school year, RCOE provided 79 professional development opportunities for 1,286 participants, with a total of 4,922 training hours for early educators.

Quality Counts CA Workforce Pathways Stipend Program and Related Efforts

CELS oversees the Quality Counts California Workforce Pathways Stipend Program (QCC WPSP), which gives financial stipends to early childhood educators for completing trainings and college courses and obtaining permits and degrees. As of 2025, FCC providers can receive stipends for completing a program leading to the opening of a new or expansion of an existing FCC. Stipends associated with the program range from $250 to $5,600. From 2021 to 2024, a total of about $1.05 million in stipends has been paid out to 645 ECE professionals who completed the QCC WP Stipend Program.

CELS also oversees and administers the Early Care and Education Workforce Advancement Project (ECEWA), which provides early childhood educators living in Federal District 39 stipends for completing college course work, professional development, and permit acquisition or upgrade. FCC providers can be reimbursed for fees for licensing orientations, licensing applications, and fingerprinting/Live Scan, CPR & First Aid training, lead training, TB and other vaccines, Health and Safety clearance, and fire extinguishers or other safety required items. During 2024/2025, 21 ECEWA FCCs worked on obtaining or upgrading their license. Thirty-one participants completed the

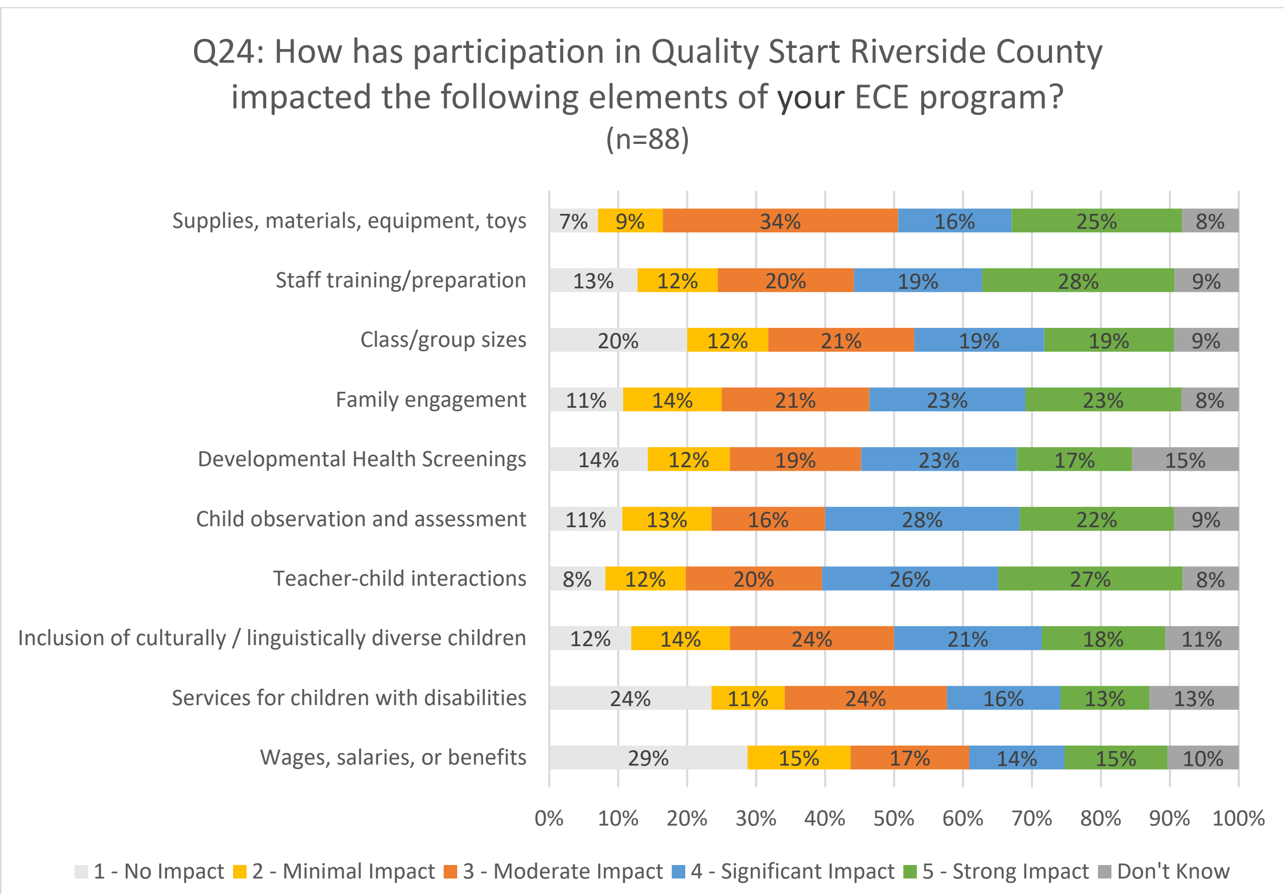
[106] Data pulled from Hubbe database Aug 22, 2025, and provided by Carol Abella, First 5 Riverside County.

trainings series and were celebrated at a dinner/graduation event. Eighty participants enrolled in the education and professional development program.

CELS, through the Inland Empire Community Foundation Child Care Training Grant (IECC), provided assessment trainings, in English and Spanish, to ECE providers throughout Riverside County. The trainings included Desired Results Developmental Profile, Meaningful Observations, Classroom Assessment Scoring System, Ages and Stages Questionnaire 3 & SE-2, and Environmental Rating Scales. Providing these trainings at no cost enables programs in high need, lower socio-economic areas to provide their ECE teaching staff with the training needed to complete valuable assessments. In 2024, this program included 21 professional growth activities and 90 hours of training, and 239 participants attended 443 trainings.

In the ECE Online Survey, those ECE providers participating in Quality Start were asked about how participating in Quality Start has impacted their ECE program. **Exhibit IV-5** shows the level of impact on various aspects of ECE programs. Survey respondents reported the greatest impact on teacher-child interactions; 52% said there was a significant or strong impact.

Exhibit IV-4



Source: Brion Economics, Inc.

IV.6 Special Populations

The Needs Assessment Template includes data on the following special populations of children: children receiving special education services, children under protective services, and the number of migrant children. Data on these populations is summarized in this section and can be cross-referenced with **Appendix E-7, E-8,** and **E-12**.

Children Receiving Special Education Services

In Riverside County, services for children under age three are managed by the Inland Regional Center, the Part C early intervention provider for Riverside and San Bernadino Counties, and children age three through high school completion are served by the school districts. In FY 2023-24, the Inland Regional Center served 10,714 children ages birth through 2 years old.[107] Data reflects all children ages 0–2 served by the Inland Regional Center, which covers both Riverside and San Bernardino Counties. A Riverside-only count is not available; therefore, this figure should be interpreted as a two-county estimate. This represents 7% of the total population of children ages 0 to 2 years old across these two counties.[108] According to the California Department of Education, there were 6,615 children ages 3 to 5 years old enrolled in Special Education in Riverside County in the 2024-25 school year,[109] representing 8% of the child population age 3 to 5 in Riverside County.[110] Of the children in special education, 52 percent, or 3,455 children, were enrolled in a preschool setting. In the ECE Online Survey, 42% of ECE providers reported serving a child with exceptional or special needs.[111]

Children Under Protective Services

The California Child Welfare Indicators Project (CCWIP), a collaboration between the University of California at Berkeley and the California Department of Social Services, provides a wealth of data on children being served through the Child Welfare System, including the number of children in foster care under protective services supervision.

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[107] California Department of Developmental Services, Inland Regional Center Annual Purchase of Service Report, FY2023-24. Downloaded from https://www.dds.ca.gov/rc/disparities/data/purchase-of-service-annual-reports/ on June 9, 2025.
[108] Calculated based on Demographic Research Unit, California Department of Finance, Report P-2B: Total Estimated and Projected Population for California Counties by Single Year of Age, July 1 2020-2070, April 2025. In 2024, the total combined number of children ages 0 to 2-years-old in Riverside and San Bernadino Counties was 158,406.
[109] California Department of Education, Dataquest, 2024-25 Special Education Enrollment by Program Setting – Riverside County.
[110] Calculated based on Demographic Research Unit, California Department of Finance, Report P-2B: Total Estimated and Projected Population for California Counties by Single Year of Age, July 1 2020-2070, April 2025. In 2024, the number of children ages 3 to 5-years-old in Riverside County was 83,979.
[111] Question 25 (n = 172).

In January 2025, a total of 1,114 children under age 6 in Riverside County were in foster care.[112] This represents 0.7% of the total child population under 6.[113] Of the children in foster care, 675 were under 3 years old, and 439 were 3 to 5 years old. Looking back over the past ten years, the number of children under 6 in foster care was highest in 2015 when 1,706 were in foster care, and lowest in 2019 when only 940 children under age 6 were in foster care. Since 2019, the number of children in foster care has increased by 19%.

The CCWIP provides a report that examines the degree to which groups of children have contact with the welfare system at higher or lower rates than their presence in the general population. For children ages 0 to 17 years old, Black children are 2.74 times more likely to be in foster care than White children, and Native American children are 2.28 times more likely to be in foster care than White children.[114] Latine and White children have welfare system contact rates that are similar, while Asian children are less likely to be in foster care.

Children in Migrant Families

Two early childhood education programs specifically serve migrant children in Riverside County: the State-funded Migrant Center-Based Child Care (CMIG) program and the federally funded Migrant Head Start program. The Renu Hope Foundation has a CMIG contract from the California Department of Social Services and serves approximately 50 children with these funds.[115] The CMIG program serves children ages 6 weeks up to kindergarten entry for a minimum of 150 days within the agricultural season (i.e., November to May). The Riverside County Office of Education is the Migrant Head Start grantee and serves approximately 700 children ages 0 to 5. In 2023-24, 340 children were served in center-based locations and 377 through partnerships with FCC providers.[116]

IV.7 ECE Facilities

While a recent facilities needs assessment is not available for Riverside County, the estimates of ECE Supply and Demand provided in **Chapter II** indicate ECE shortages that will necessitate new facilities (See **Section 2 of Chapter II** for further details on shortages). Highlights of progress made in building new facilities and expanding capacity, such as facilities projects supported by First 5 Riverside County and other County agencies, CELS efforts to increase the supply of FCCs, SB 234 Implementation, and the California Infrastructure Grant Program, are included below.

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[112] California Child Welfare Indicators Project (CCWIP), University of California at Berkeley, CWS/CMS 2024 Quarter 4 Extract, retrieved from https://ccwip.berkeley.edu on May 27, 2025.
[113] Calculated based on Demographic Research Unit, California Department of Finance, Report P-2B: Total Estimated and Projected Population for California Counties by Single Year of Age, July 1 2020-2070, April 2025. In 2025, the number of children ages 0 to 5-years-old in Riverside County was 162,101.
[114] CCWIP, 2024.
[115] California Department of Social Services, CATS Contract Report FY2024. Spaces estimated based on contract amounts, minimum days of operation and daily rate, as well as licensed capacity by age group.
[116] Office of Head Start, Migrant and Seasonal Services Head Start Services Snapshot, Riverside County Office of Education (2023-24).

County Facility Projects

The following table summarizes recent ECE facility projects supported by First 5 Riverside County and other County agencies, which include both the development of new ECE spaces and the renovation of existing spaces. The Board of Supervisor District for each project is also shown. Every project braided funding from Proposition 10 and, in some cases, American Rescue Plan Act (ARPA) funds, Development Impact Fees (DIF), or County Development Impact (CDI) fees. In 2021, the Riverside County Board of Supervisors allocated $15 million of ARPA funds for the ECE sector, to be administered by First 5 Riverside County.[117] Five million was allocated to ECE facilities expansion, with the intent that funding would flow to projects in each of the five Supervisorial Districts (the other $10 million was allocated for workforce stabilization as discussed below in **Section 15**: ELC Workforce and Quality). The first facilities project to use ECE Recovery ARPA funds was approved in 2022.[118]

As shown below, in total, the County has developed 180 new spaces, mostly Infants/Toddler spaces, and 169 renovated spaces, for a total of 349 spaces in recent years. A total of $34.4 million has been allocated to ECE facilities over the last four years by First 5 Riverside County and other County agencies.

Together, these projects represent a countywide, multi-year, multi-stream strategy in which all five Supervisorial Districts are represented. Projects include a mixture of new builds, major renovations, classroom additions, and outdoor/play yard improvements. Nearly all investments have targeted Infant/Toddler capacity, the most underserved group.

CELS Supports to Increase FCC Facilities

CELS provides focused efforts on expanding the ECE supply in the County. Due to limited ECE spaces, licensed providers, and funding streams, Department of Social Services (DSS) families often have challenges remaining employed and/or completing required activities. CELS is increasing the number of new FCCs and expanding small FCCs to large, ensuring greater access to ECE for DSS clients. In 2024, 170 small FCCs were in process and 21 new small FCCs were licensed with 168 new spaces created. An additional 40 FCCs were in the expansion process, with 10 expansions completed, and 60 new spaces created.

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[117] Retrieved from https://rivco.org/sites/g/files/aldnop116/files/About%20the%20County/Budget%20and%20Financial%20Information/ARPA/Form11_F5_Early%20Care%20and%20Education%20(ECE)_09.14.2021.pdf on June 12, 2025.
[118] County of Riverside, Child Care Funding Breakdown, January 2023. Retrieved from https://rivco.org/sites/g/files/aldnop116/files/2023-01/1.17.23%20ARPA%20Infographic_F5RC_RCOE%20Children%20Impacted_2nd%20Payment%20Business_Educators.pdf

Table IV-10
Recent Facilities and Access Projects by First 5 and Other Agencies (1)
Riverside County Needs Assessment - 2025

BOS District	Project Name and Location	Funding Mix	Capacity Impact
1	Lakeland Village	$5.1M ARPA D1/D2/ECE + $3.5M Prop 10 + $607K DIF	+48 infant/toddler spaces
1	Temple Beth El	$172,038 Prop 10	Renovation, +24 IT spaces
2	Escuela de la Raza Unida (Blythe)	$2.18M Prop 10	Modular facility + splash pad, +36 IT spaces
2	Family Service Association (Riverside)	$780K Prop 10 (reduced from $1.5M)	Renovation, +47 IT spaces
3	French Valley Child Care Center	$12M ARPA Facilities(D3) + $2M Prop 10 + $2M County Library + $1M Countywide ARPA contingency + $1M ARPA ECE Recovery	New 13,000 SF site, +48 IT spaces
3	ViP Tots (Hemet)	$382,678 Prop 10	Outdoor playground, +24 IT spaces
4	Bermuda Dunes	$585,160 Prop 10	Kitchen/restroom/playground renovation, +50 IT spaces
4	Desert Rose	$1M ARPA	Renovation/new classrooms, ~+48 spaces
5	Jan Peterson CDC (Moreno Valley)	$1M ARPA + $1.1M Prop 10	New building + playground, +24 IT spaces
All	**Total Spaces Added or Renovated**	**$34.4M**	**349**

(1) Information provided by Charna Widby, First 5 Riverside County via email, August 29, 2025.
Sources: First 5 Riverside County; Brion Economics, Inc.

SB 234 Implementation

In 2019, California adopted legislation (SB 234, Skinner) that would support the expansion of FCC facilities. SB 234 requires that all FCCs, regardless of size, be considered a by-right residential use. Jurisdictions such as cities and counties are prohibited from requiring a business license, fee, or tax for the use of all FCCs, and they cannot impose ordinances or regulations on FCCs that are different from the ordinances or regulations for residential properties in that jurisdiction. Entities that wish to support cities with full implementation can provide resources such as the Factsheet from the Governor's Office of Planning and Research or resources from the Child Care Law Center, to make sure cities are continuing efforts to implement SB 234. First 5 Riverside County and Build Up Riverside County are in the process of conducting a Land Use Study to better understand the cities' zoning and permitting processes, which will also inform SB 234 implementation when completed.

California Child Care and Development Infrastructure Grant Program (IGP):

In Round 1 (minor repairs and renovations grant), 252 applications were submitted from Riverside County, totaling $20 million in requested funds. Of those, 196 applications were approved, resulting in $9 million in awarded funding. Most of the successful applicants in the County were home-based ECE providers, with 162 home-based programs and 34 center-based programs receiving grants. In the County, the grants preserved 1,000 jobs, and approximately 6,000 children benefited from improved early learning environments. In Round 2 (new construction and major renovations), Riverside County providers submitted 83 applications, requesting a total of $26 million. However, only two applications by FCC providers from the County were ultimately approved, with a combined funding total of just $103,200 – less than 1% of the total funds requested. The Round 2 grants will increase ECE spaces by just 12 spaces: 9 Infant/Toddler, 2 Preschool, and 1 School Age spaces. If all of the grant applications had been funded, 2,016 new spaces would have been created, demonstrating the potential for expansion were additional funds available. Altogether, Riverside County received approximately 4.5% of the total available funding across both rounds of the IGP. Awareness of this funding opportunity may not have reached all providers in the County, and the total need for facilities funding may be underrepresented in the IGP applications. In the ECE Online Survey, 55% of respondents did not know about the program.[119]

Exhibit IV-6 below provides an overview of the IGP in Riverside.

Exhibit IV-5
California Child Care & Development Infrastructure Grant Program (IGP) - Riverside County[120]

Round of Funding	Purpose of Grant	ECE Provider Applications Received	Requested Funding (Total)	Accepted Applications	Available Funding (Approved)
Round 1	Minor repairs and renovations (applications closed 3/25/22)	**Statewide**			
		> 5,000	$309.6 million	> 3,800	$200.5 million
		Riverside County			
		252	$20 million	196	$9 million
Round 2	New construction and major renovations (applications closed 1/31/23)	**Statewide**			
		1,848	$666 million	TBD	$150 million
		Riverside County			
		83	$26 million	2	$103,200

Source: Build Up California, County Fact Sheet – Riverside County, March 2024. Retrieved from: https://buildupca.org/wp-content/uploads/2024/03/Riverside_IGPFactSheet_v.2.pdf on June 11, 2025.

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[119] Question 30 (n= 129).
[120] Build Up California, County Fact Sheet – Riverside County, March 2024. Retrieved from: https://buildupca.org/wp-content/uploads/2024/03/Riverside_IGPFactSheet_v.2.pdf on June 11, 2025.

Build Up Riverside County

First 5 Riverside County partnered with the Low-Income Investment Fund (LIIF) and Lift to Rise to launch Build Up Riverside County in 2022. This collaborative initiative was established to expand and enhance ECE facilities throughout the county. Build Up Riverside offers a range of resources and technical assistance for child care providers, developers, and others interested in expanding child care spaces. These resources include technical assistance for child care providers and developers, publications, and development tracking tools.

IV.8 ECE Workforce

According to the US Bureau of Labor Statistics, as of 2024, approximately 7,910 people work in ECE and preschool careers in the Riverside-San Bernadino-Ontario Metro Area.[121] The ECE and preschool workforce consistently earns lower wages than the early elementary workforce, across all occupations, as shown in **Table IV-11**. For example, a child care worker earns 43% of what a Kindergarten teacher does, and a preschool teacher earns 50%. Preschool and child care administrators earn 38% of what an early elementary administrator earns. The table below represents estimates of people employed in ECE careers in the Riverside-San Bernadino-Ontario Metro Area and serves as a proxy for a Riverside-only count, based on available data.

Table IV-11
Wages for Child Care and Early Education Careers, Riverside-San Bernardino-Ontario, CA Metro Area - 2024
Riverside County Needs Assessment - 2025

Occupation	Number Employed	Annual median wage
Administrators (K through Secondary)	3,430	$160,750
Elementary School Teachers	18,270	$97,560
Kindergarten Teachers	410	$86,820
Administrators (Preschool and Daycare)	430	$61,180
Preschool Teachers	3,450	$43,720
Childcare Workers	4,030	$37,020

Sources: US Bureau of Labor Statistics, Occupational Employment and Wage Statistics for Riverside-San Bernardino-Ontario, CA (May 2024), retrieved from https://data.bls.gov/oes/#/geoOcc/Multiple%20occupations%20for%20one%20geographical%20area on May 29, 2025;
Sarah Kinahan Consulting, Brion Economics, Inc.

[121] US Bureau of Labor Statistics, Occupational Employment and Wage Statistics for Riverside-San Bernardino-Ontario, CA (May 2024), retrieved from https://data.bls.gov/oes/#/geoOcc/Multiple%20occupations%20for%20one%20geographical%20area on May 29, 2025.

Chapter III provides greater detail on the demographics of the ECE Workforce, as well as their education levels and desire for further education and credentialing based on the ECE Online Survey. Several data points standout - 40% of respondents are age 50 or older[122], and 24% have worked in the field for over 20 years.[123] Although 82% of respondents do not plan to leave the field in the next 12 months,[124] this dedicated, yet aging, workforce may be nearing retirement, necessitating a pipeline of new workers to be developed to fill vacancies. Most survey respondents (83%) indicated that higher wages or salaries would motivate them to continue their career in ECE.[125]

ARPA Early Care and Education Wage Enhancement

The County allocated $10 million in American Rescue Plan Act of 2021 (ARPA) funds for workforce stabilization that was administered by First 5 Riverside County. A wage enhancement stipend was issued through four payments over a three-year-period to supplement income and recognize the importance of the role of those employed in the ECE field, specifically those working with children ages 0-5. More than 9,600 stipends were issued to 3,100+ early educators across the County (with retention rates averaging 71–76% across four rounds).[126] First 5 Riverside County received a 2024 California State Association of Counties (CSAC) Challenge Award for this work.

IV.9 Parent Needs and Concerns

Data from parent surveys or focus groups is not available. Data from the Riverside R&R Agency is presented as one means of understanding the reasons that parents have for seeking ECE services, the ages of children needing care, and the schedules that parents are seeking.

Most referral requests (76%) to the Riverside Child Care Resource and Referral (R&R) Agency are made because the parents are employed, as shown in **Table IV-12**. Other common reasons for seeking a child care referral are looking for work (11% of referral requests) or in school/training (11% of referral requests).

Most families are seeking full-time care (87% of requests). Most referrals were for Preschool children (53%), followed by Infants (34%), and lastly for School Age (14%), as shown in **Table IV-13**.

[122] Question 45 (n= 335).
[123] Question 47 (n= 335).
[124] Question 58 (n= 327).
[125] Question 60, n = 324.
[126] Information provided by Charna Widby, First 5 Riverside County via email, August 29, 2025.

Table IV-12
Purpose of Referral Request - 2024 - 2025
Riverside County Needs Assessment - 2025

Reason for Referral	Number of Requests	Percent of Requests (1)
Employed	10,072	76%
Looking for Work	1,442	11%
In School/Training	1,411	11%
Other Parental Needs	392	3%
CPS/Respite	994	8%
Alternative/Back-up Care	436	3%
Mildly Ill Child	24	0%
Enrichment and/or Development	394	3%
Total Referral Requests	**13,229**	**115%**

(1) Percent of requests totals to greater than 100% because families can provide more than one reason for seeking the referral.

Source: Riverside County Office of Education, Resource and Referral Department, CD 2504- Service Data Report for 11/01/2024 to 04/30/2025. Sarah Kinahan Consulting, Brion Economics, Inc.

Table IV-13
Type of Referral Request - 2024 - 2025
Riverside County Needs Assessment - 2025

Referral Request	Number of Requests	Percent of Requests
Child Age		
Infant (Under 2)	5,252	34%
Preschool (2 to 5)	8,280	53%
School Age (6+)	2,112	14%
Total Children	**15,644**	**100%**
Time Category		
Full-Time	14,209	87%
Part-Time	2,212	13%
Total by Time Category	**16,421**	**100%**

Source: Riverside County Office of Education, Resource and Referral Department, CD 2504- Service Data Report for 11/01/2024 to 04/30/2025.

Sarah Kinahan Consulting, Brion Economics, Inc.

IV.10 UPK Mixed Delivery Planning

A major change that impacts ECE access throughout the State is Universal Pre-Kindergarten (UPK) planning efforts. In alignment with California's implementation of UPK, RCOE oversees the UPK Planning and Implementation Grant and CELS oversees the Universal Pre-Kindergarten Mixed Delivery Planning Grant (UPKMDPG).[127] Because UPK planning is inextricably linked with ECE planning, a summary of UPK mixed-delivery planning efforts is included below.

A UPK Mixed Delivery Planning Workgroup, under the administration of CELS, will serve as a feedback forum to provide input and diverse perspectives on integrating a mixed delivery systems approach to expanding care and education for three- and four-year-old children, as required by California Education Code 8320. The Workgroup includes various sectors, including education (LEAs, RCOE, TK programs, special education preschools, institutes of higher education), care providers (Title 22 child care centers, Title 22 family child care homes, Head Start, Early Head Start, tribal child care, CSPP, CCTR), community organizations (First 5 Riverside County, R&R, tribal partners, business leaders, local governments), and advocacy and support services (SELPA, Regional Centers, AP, ASES, 21st CCLC, FCCH networks). The goal of the Riverside County UPK Mixed Delivery Planning Workgroup is to enhance early childhood education through comprehensive planning, stakeholder engagement, and advocacy. The Workgroup aims to create a cohesive and equitable mixed-delivery system that promotes parent choice and aligns the ECE and TK-12 systems. The Workgroup will accomplish much of its work through group discussions, meetings, surveys, and regional focus groups.

Appendices (Under Separate Cover)

A. Detailed Demographic Data

B. ECE Supply and Demand by Region – 2025 and 2030

C. Online Survey Instrument

D. Detailed Online Survey Results

E. State Needs Assessment Template – Riverside County - 2025