



TENNESSEE DEPARTMENT OF
**HUMAN
SERVICES**



Child Care Task Force

November 9th, 2021 | Child Care Task Force Meeting

Agenda

- Commissioner's Update
- Child Care Labor Market
- Child Care Professional Supply & Demand
- Child Care Talent Development & Retention
- Child Care Resource Map Update
- Concluding Remarks & Next Steps
- Executive Session



Commissioner's Update

Child Care Labor Market

Child Care Labor Market Information

Presented by

Department of Labor and Workforce Development

Workforce Insights, Research and Reporting Engine Division/WIR²ED

November 9, 2021

Childcare Workers:

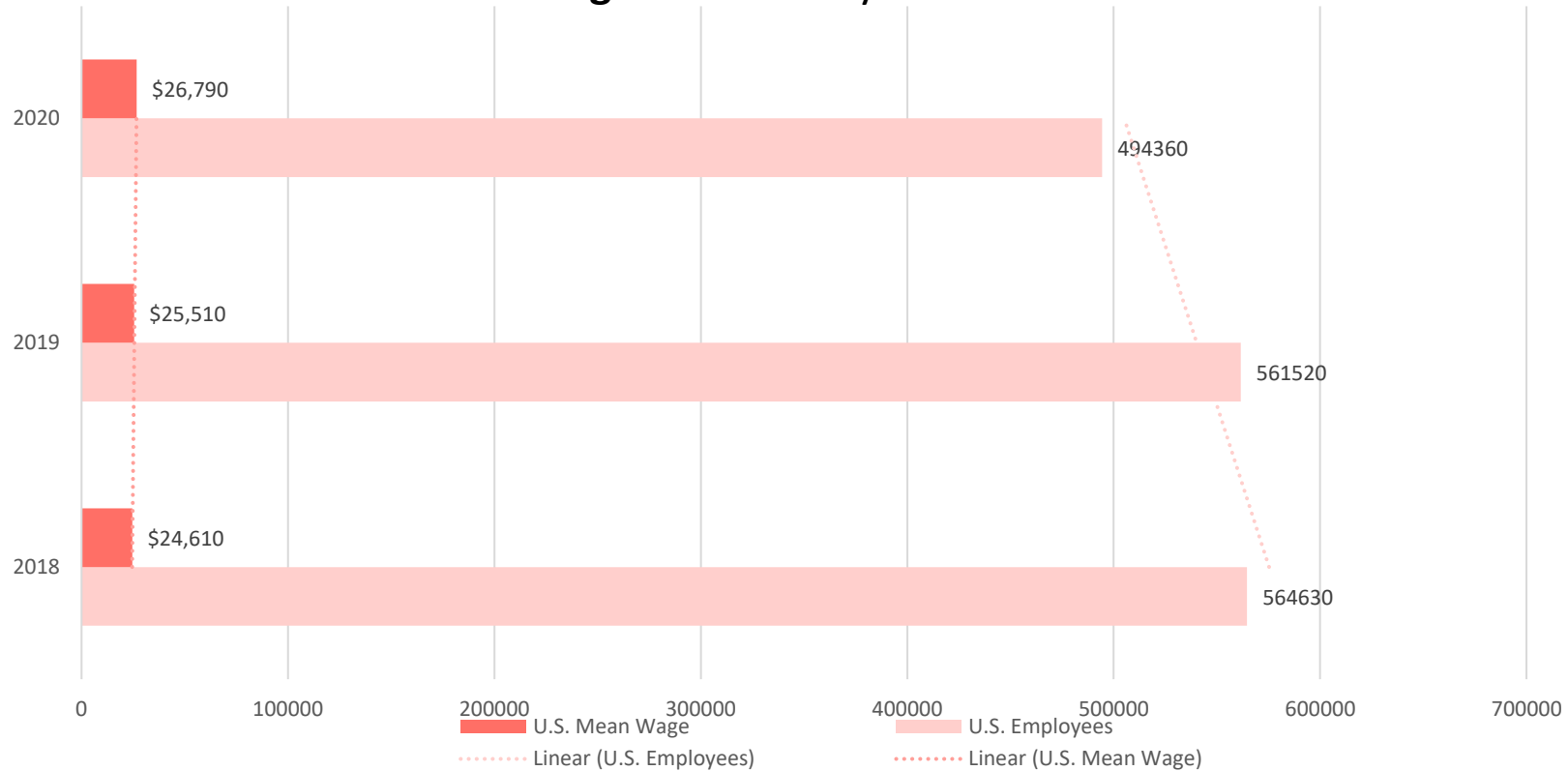
Definition:

- Attend to children at schools, businesses, private households, and childcare institutions.
- Perform a variety of tasks, such as dressing, feeding, bathing, and overseeing play.
- Excludes “Preschool Teachers, Except Special Education” (25-2011)
- Excludes “Teaching Assistants, Preschool, Elementary, Middle, and Secondary School, Except Special Education” (25-9042).

Source: Occupational Employment and Wages Survey (OEWS)

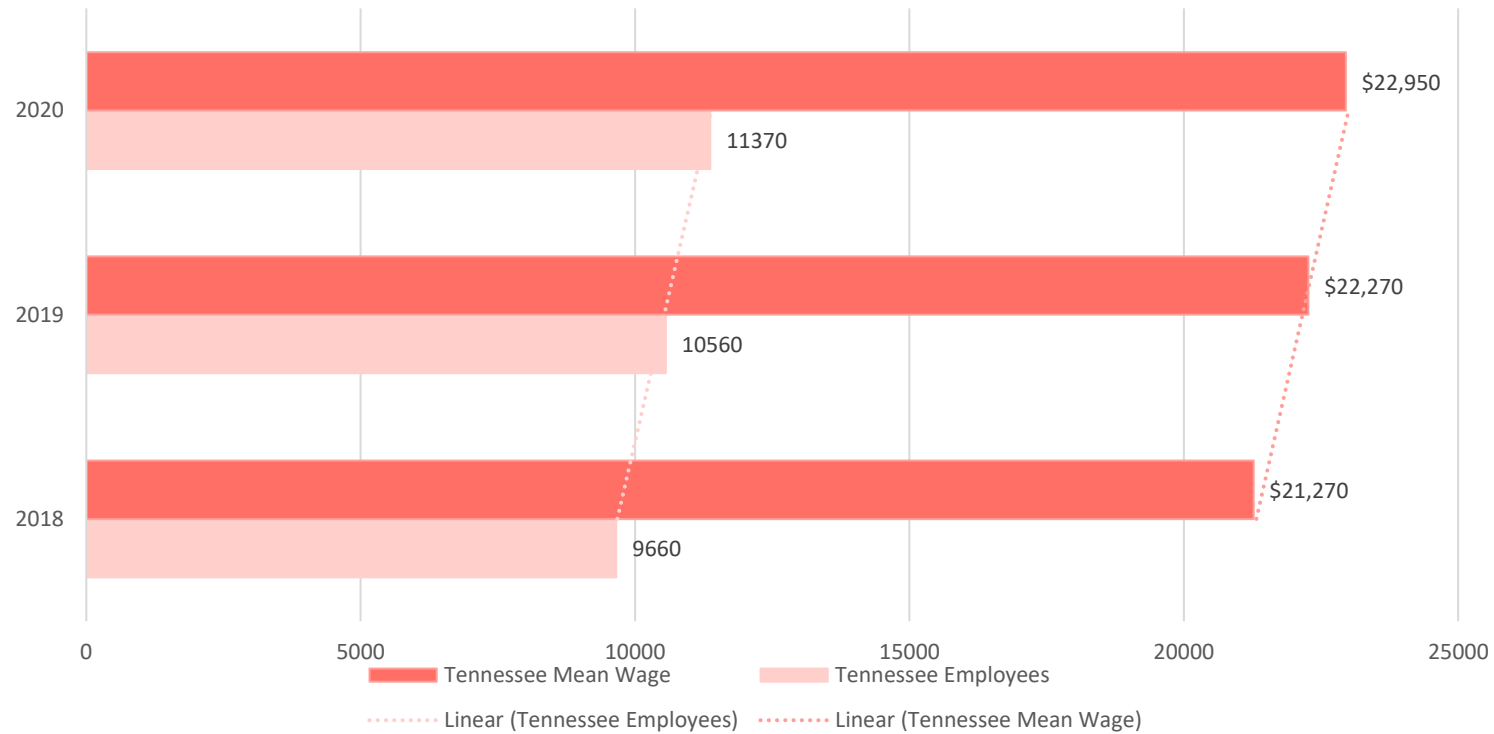
US : Childcare Workers (39-9011)

- Hourly Wage (mean) in 2020 : **\$12.88** (annual Wage (mean) : \$26,790)
- Wages are **increasing** in last three years
- # of workers are **decreasing** in last three years



Source: Occupational Employment and Wages Survey (OEWS)

TN : Childcare Workers (39-9011)



- Hourly Wage (mean) in 2020 : **\$11.04** (annual Wage (mean) : \$22,950)
- Wages are **increasing** in last three years
- # of workers are **increasing** in last three years

Source: Occupational Employment and Wages Survey (OEWS)

US vs TN : Childcare Workers

US vs TN

- ❑ Hourly Wage (mean) in 2020 : **US - \$12.88 ; TN - \$11.04**
- ❑ Annual Wage (mean) in 2020 : **US - \$26,790 ; TN - \$22,950**
- ❑ # of Childcare workers in US : **Decreasing** in last 3 years
- ❑ # of Childcare workers in TN : **Increasing** in last 3 years

Neighboring State : Childcare Workers

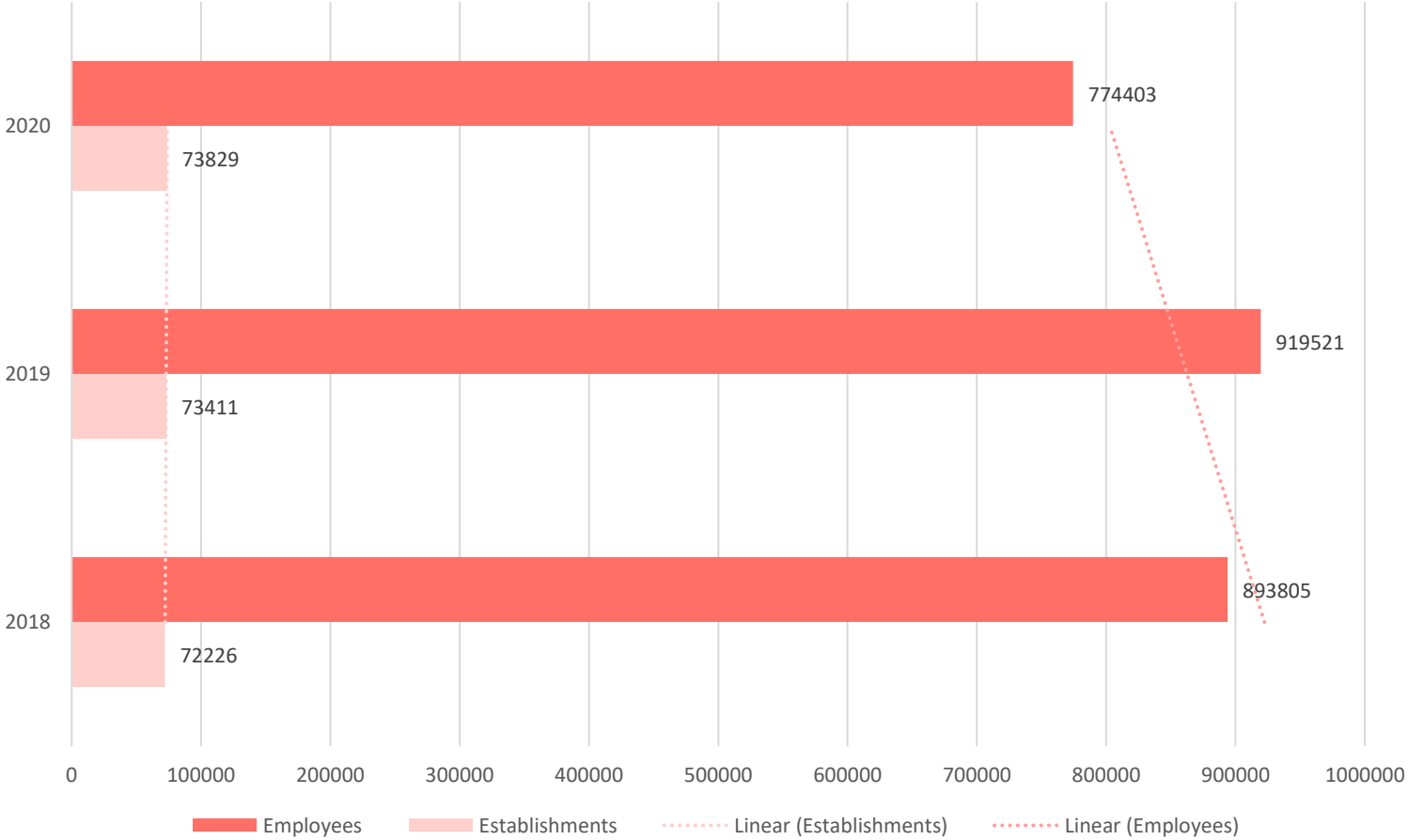
State	Employment	Annual Mean Wage	Location Quotient *
Alabama	5,760	\$ 20,910	0.85
Arkansas	5,150	\$ 23,050	1.23
Georgia	14,350	\$ 21,100	0.94
Kentucky	8,130	\$ 23,130	1.28
Mississippi	5,120	\$ 20,040	1.34
Missouri	12,930	\$ 25,150	1.35
North Carolina	16,600	\$ 24,600	1.09
South Carolina	5,630	\$ 22,510	0.79
Tennessee	11,370	\$ 22,950	1.10

Out of 9 state:

- TN is 5th state that pays high wages to Childcare workers
- TN is 4th state that has high # of Childcare workers
- Location quotient is greater than 1 for TN.

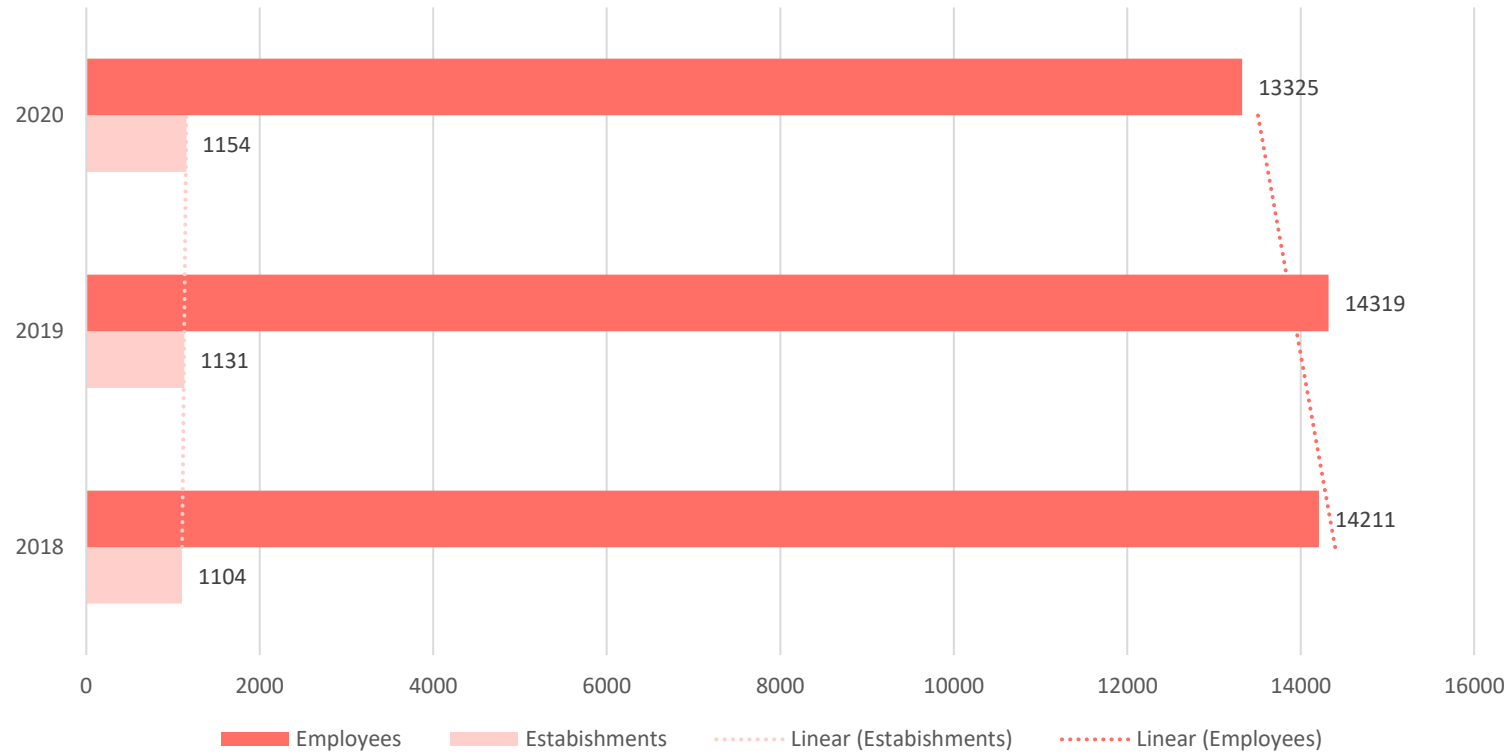
* The location quotient is the ratio of the area concentration of occupational employment to the national average concentration.

US : Childcare Services (Industry NAICS : 6244 : Private only)



Source: Quarterly Census of Employment and Wages Survey (QCEW)

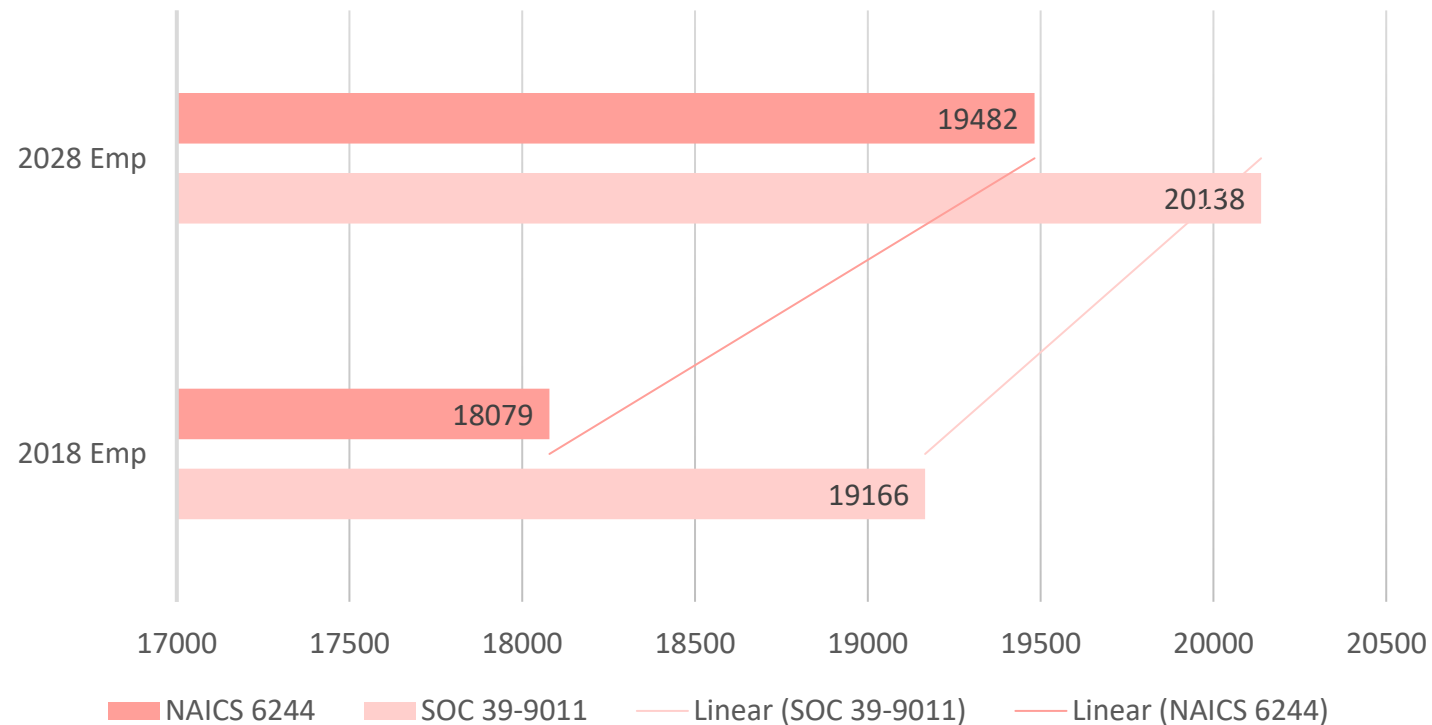
TN : Childcare Services (Industry NAICS : 6244 : Private only)



Source: Quarterly Census of Employment and Wages Survey (QCEW)

TN Projections (2018-2028) : Employment

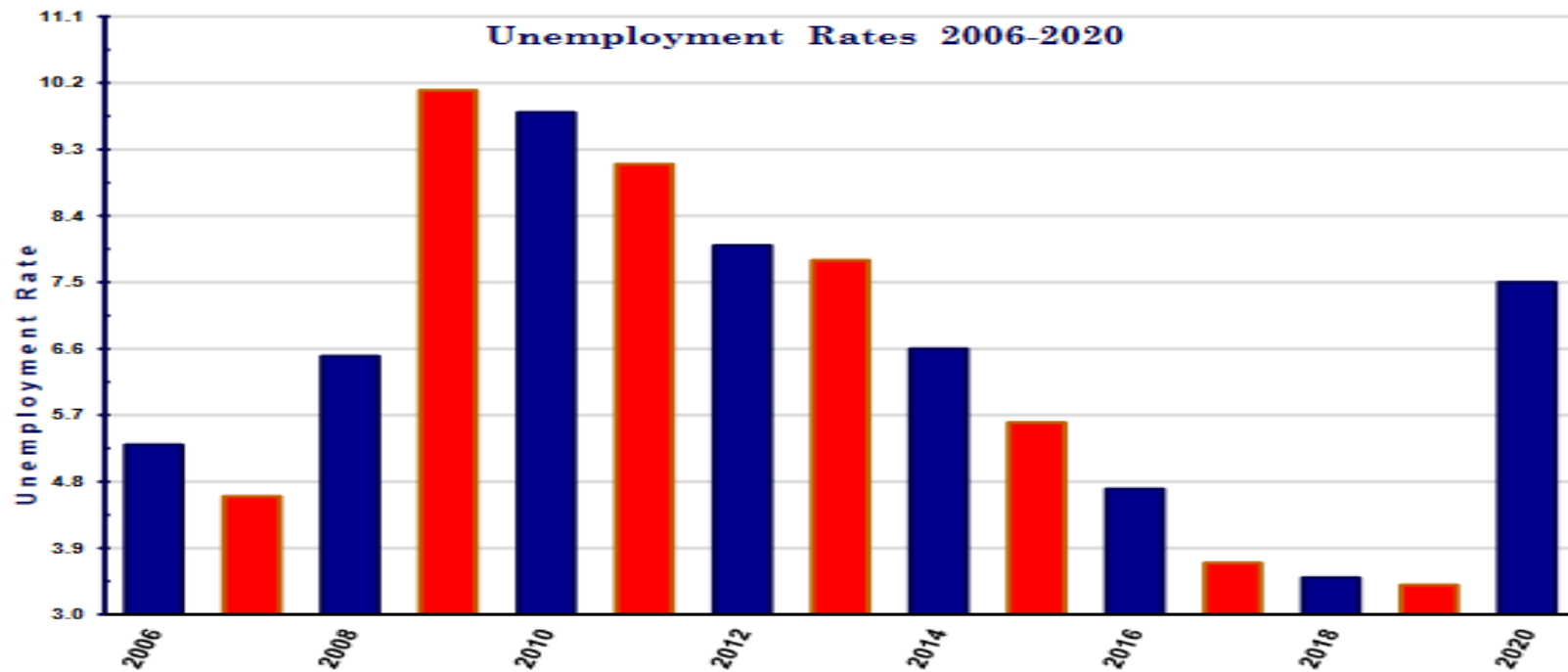
- Childcare workers (SOC 39-9011) shows .5 annual % change
- Childcare services (NAICS 6244) shows .75 annual % change



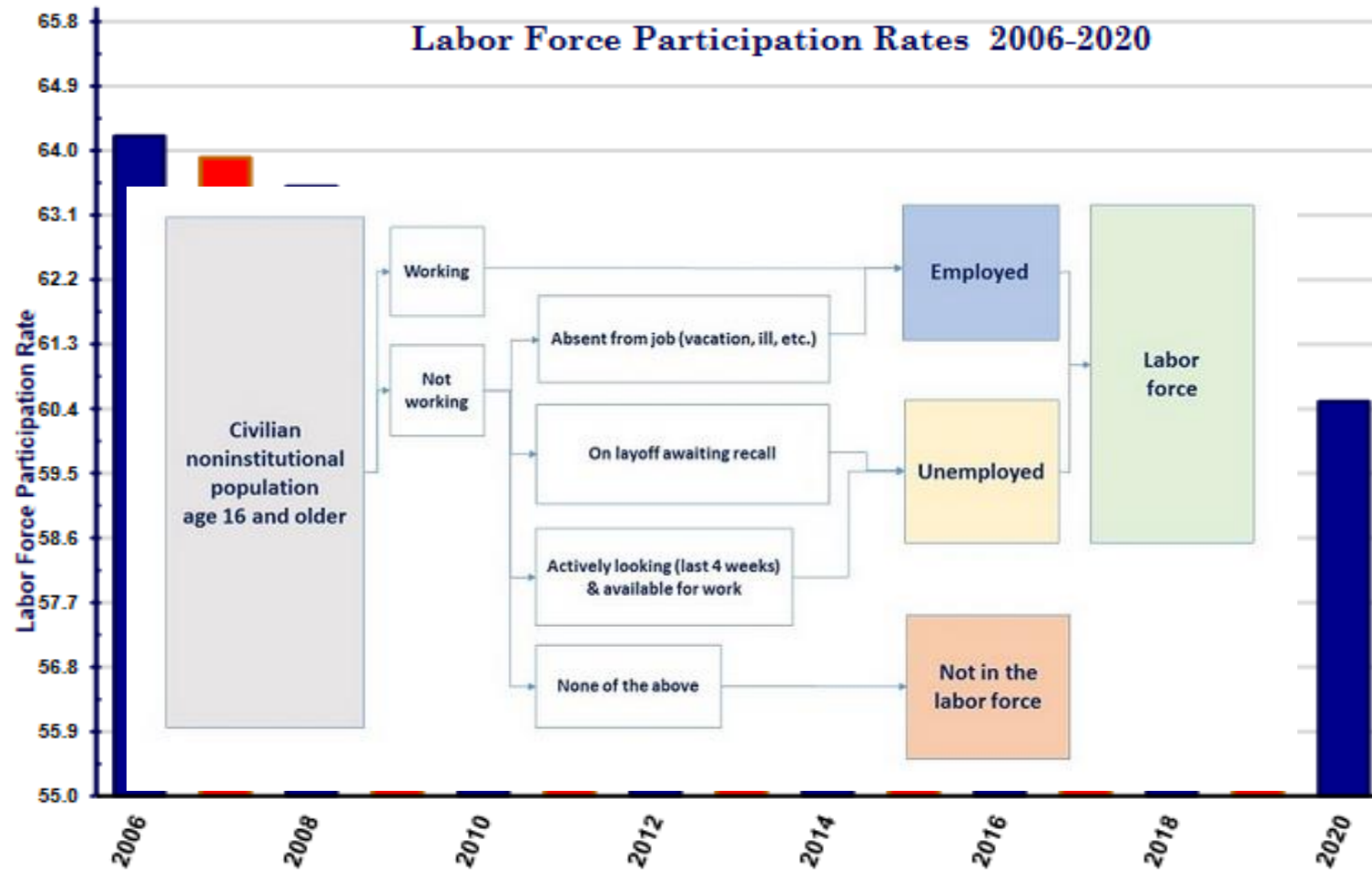
TN Labor Force Estimates

September 2021 (Pre.)
Seasonally Adjusted

	Labor Force	Employed	Unemployed	Rate
UNITED STATES	161,354,000	153,680,000	7,674,000	4.80%
TENNESSEE	3,322,354	3,175,467	146,887	4.40%

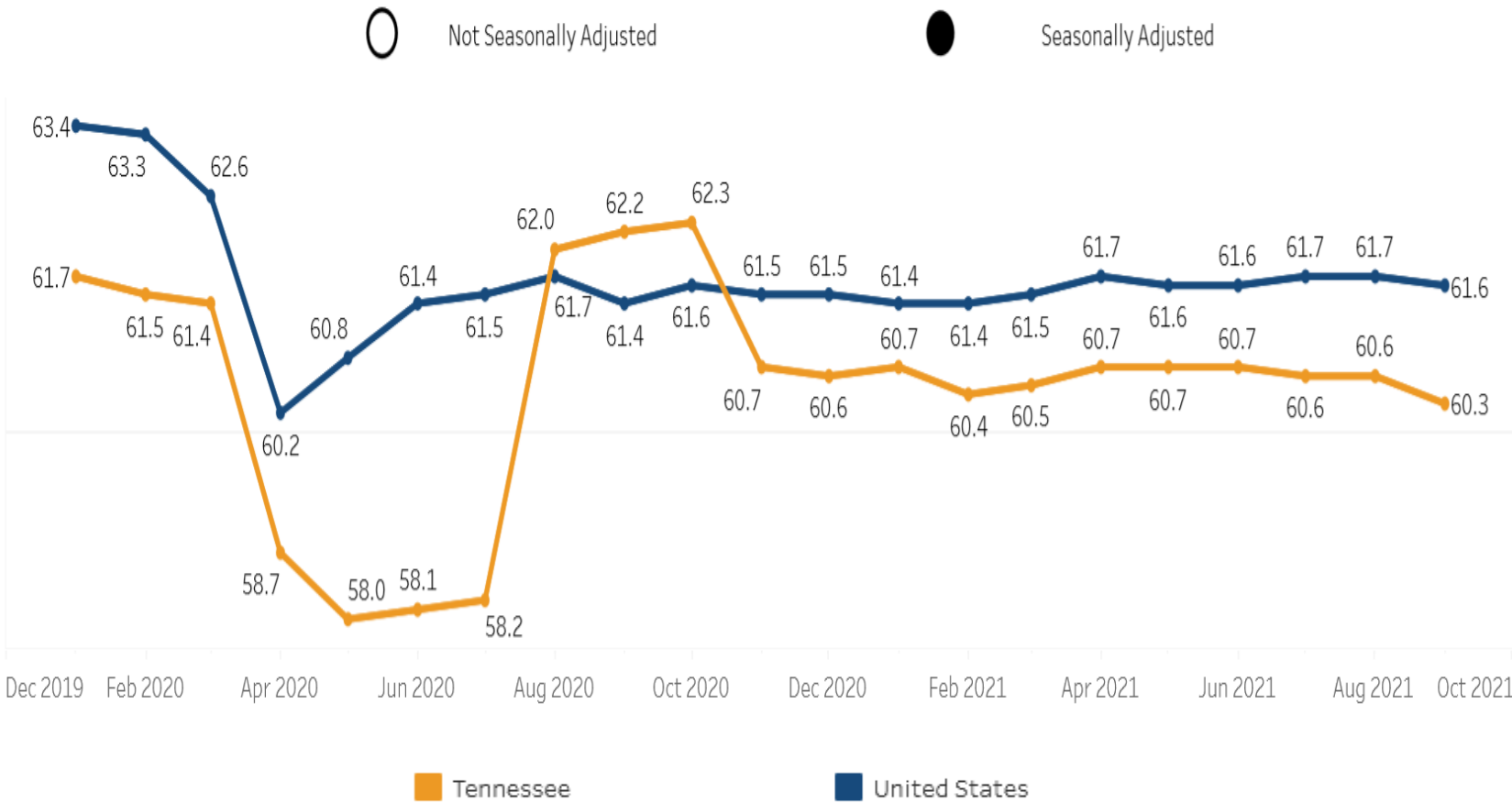


TN Labor Force Participation Rate



Labor Force Participation Rate : US vs. TN

US / Tennessee LFPR Seasonally Adjusted



Labor Force US vs. TN

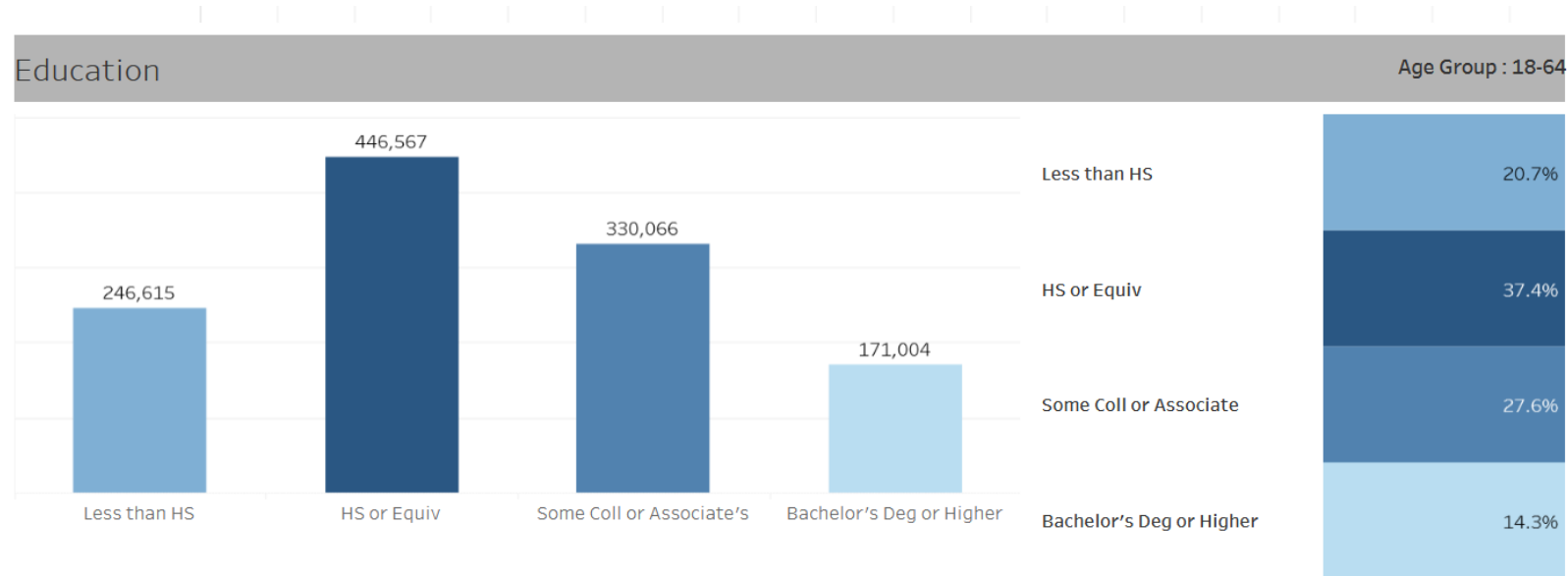
- September 2021 (Seasonally Adjusted)

	Civ NonInst. Pop 16+	Lab Force	LFPR	Employed	E/P Ratio
United States	261,766,000	161,354,000	61.6%	153,680,000	58.7%
Tennessee	5,509,190	3,322,354	60.3%	3,175,467	57.6%

- 2,186,836 population **not in** labor force.

TN : People NOT in Labor Force (Age 18-64)*

- 1,194,252 are NOT in labor force
- 28.21% of NOT in labor force (only 71.8% are in labor force)
- Male : 443k ; Female : 751k : Not in labor force
- Education Level



* Not seasonally adjusted data

Source: Local Area Unemployment Statistics (LAUS) -TDLWD,
2019 American Community Survey 5-Year Estimates

Available Jobs in Childcare Services Industry (6244)

- Job openings on November 7,2021 : 281
- 0.5% of all jobs in TN
- Monthly Job Count (October 2021) : 406
- Total Employers : 1,576
- Wages (average) : Hourly - \$10.43 ; Annual - \$21,684

Source : [Jobs4TN.gov](https://jobs4tn.gov)

Childcare Workers (39-9011)

- Job openings on November 7, 2021 : 86
- Available candidates : 535
- Monthly Job Count (October 2021) : 133
- Candidates available per job opening : 6.22
- Wages (median) : Hourly - \$12.00 ; Annual - \$24,960

Source: Online advertised jobs data in Jobs4TN.gov

Note: This information is based on actual job orders and is not based on a statistically valid labor market survey. Hourly wage rate calculations in this section assume a 40 hour work week.

Some useful resources :

- www.Jobs4TN.gov : Labor Market Information
- [Labor Force Participation Analysis Dashboard](#)
- [Labor Force Estimates](#) report (monthly)
- [Labor Market Report](#) (monthly)
- [Tennessee's Economy](#) Annual Report

Contact us:

wired.info@tn.gov

615-741-2284

Child Care Professional Supply & Demand



Early Childhood Education Programs at Tennessee's Community Colleges & TCATs

Child Care Task Force November 9, 2021

Dr. Jothany Blackwood, Vice Chancellor for Academic Affairs, TBR

A photograph of a classroom scene. A female teacher is sitting on the floor, reading a book to a group of young children. The children are sitting on the floor, facing the teacher. The classroom is filled with educational materials, including a calendar, a bulletin board, and shelves with books and toys. The image has a dark blue overlay.

Pathways to Careers in Early Childhood Education

Workforce-Ready Programs at Tennessee's
Community Colleges & TCATs

Thirteen TBR colleges offer workforce-ready programs in Early Childhood Education.



Associate of Applied Science

NINE community colleges offer associate of applied science degree programs in early childhood education.

These programs require approximately 60 credit hours to complete.



Long-Term Technical Certificate

TEN community colleges offer long-term technical certificates in early childhood education.

These programs require approximately 24 credit hours to complete.



Short-Term Technical Certificate

THREE community colleges offer short-term technical certificates in early childhood education.

These programs require approximately 12 credit hours to complete.

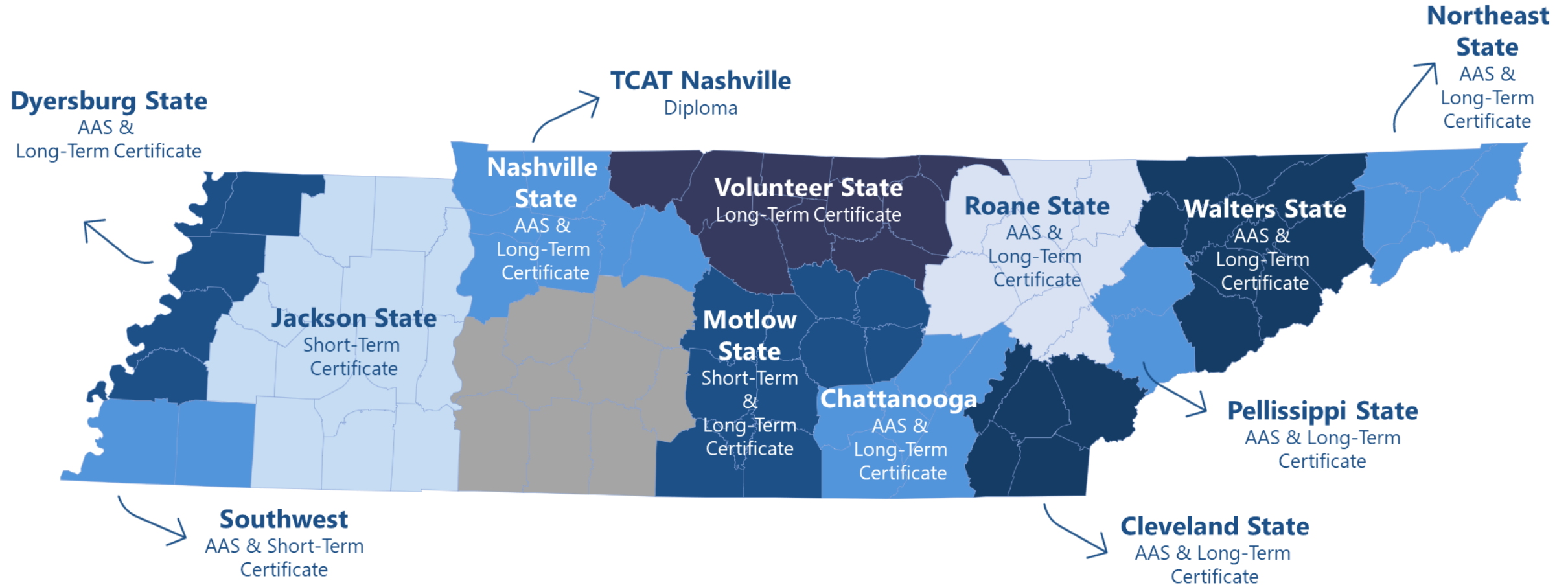


TCAT Diploma

ONE Tennessee College of Applied Technology (TCAT Nashville) offers a diploma in early childhood education.

This program requires approximately one year (1296 clock hours) to complete.

Thirteen TBR colleges offer workforce-ready programs in Early Childhood Education.



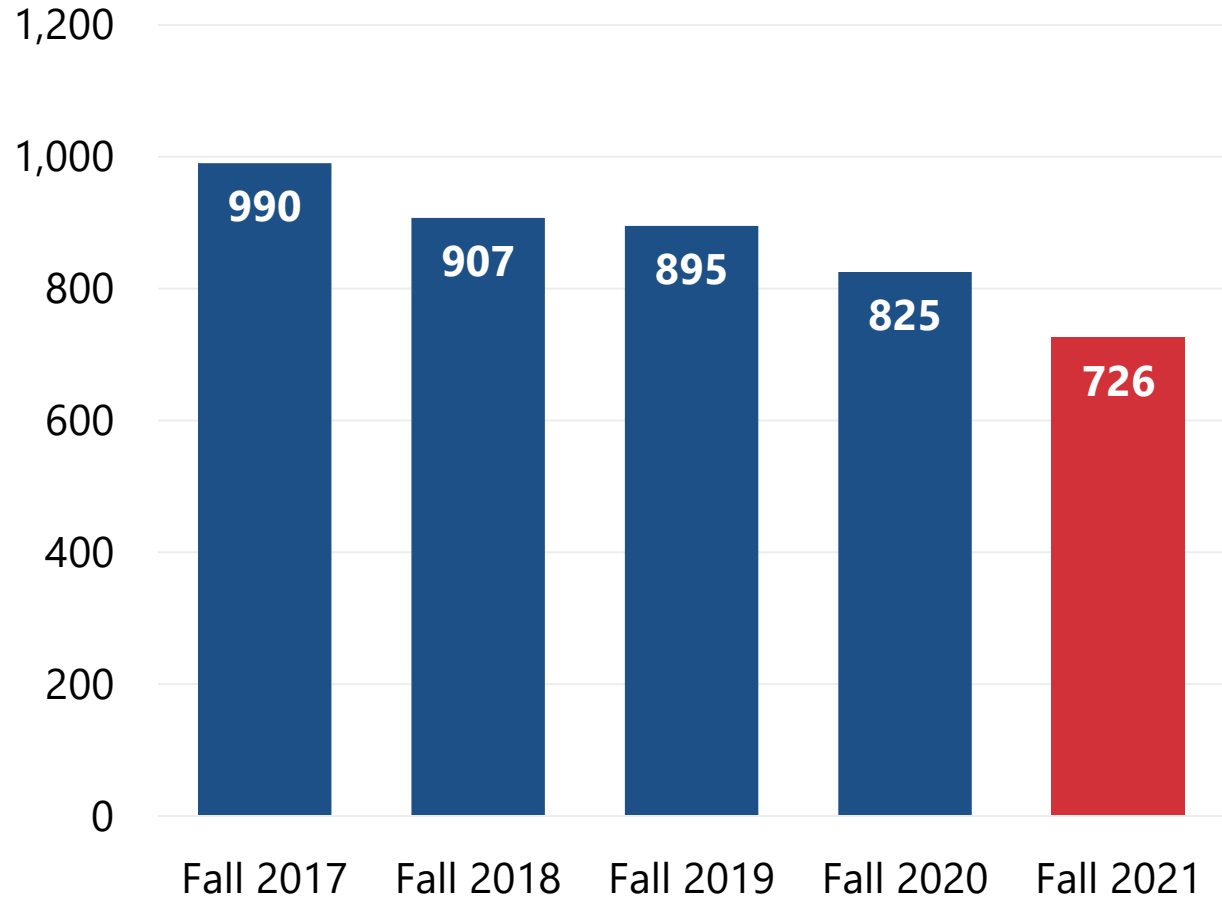
*Note: The associate degree program at Motlow State Community College is not included in the counts of programs above, as it will be phased out in 2023. Associate degree programs were also phased out at Columbia State (in 2018) and Volunteer State (in 2020).

A photograph of two students, a young woman and a young man, sitting at a desk in a classroom or computer lab. They are both looking at a computer monitor. The woman is in the foreground, and the man is behind her. They are both wearing white t-shirts. The woman's t-shirt has some text on it, including "Save for Life". The man is typing on a keyboard. The background shows a window with a grid pattern. The overall lighting is soft and slightly dim, with a blueish tint. The text "The College Pipeline of Early Childhood Educators" is overlaid on the left side of the image in a large, white, sans-serif font. Below the title is a thin white horizontal line. Below the line is the text "At Tennessee's Community Colleges & TCATs" in a smaller, white, sans-serif font. In the bottom right corner, there is a small, white, italicized text "Photo: Motlow State".

The College Pipeline of Early Childhood Educators

At Tennessee's Community Colleges & TCATs

More than 700 students are enrolled in Early Childhood Education programs.



As of fall 2021, 726 students are enrolled in early childhood education programs.

Enrollment in these programs has declined slightly over time.

*Source: TBR end-of-term data. Includes AAS, certificate, and diploma programs at community colleges and TCATs. Fall 2021 data is preliminary and may increase by the end of the term. Enrollment totals include students at programs that will be terminated. Jackson State added the certificate program in 2020.

In fall 2021, more than 700 students are enrolled in programs across the state.

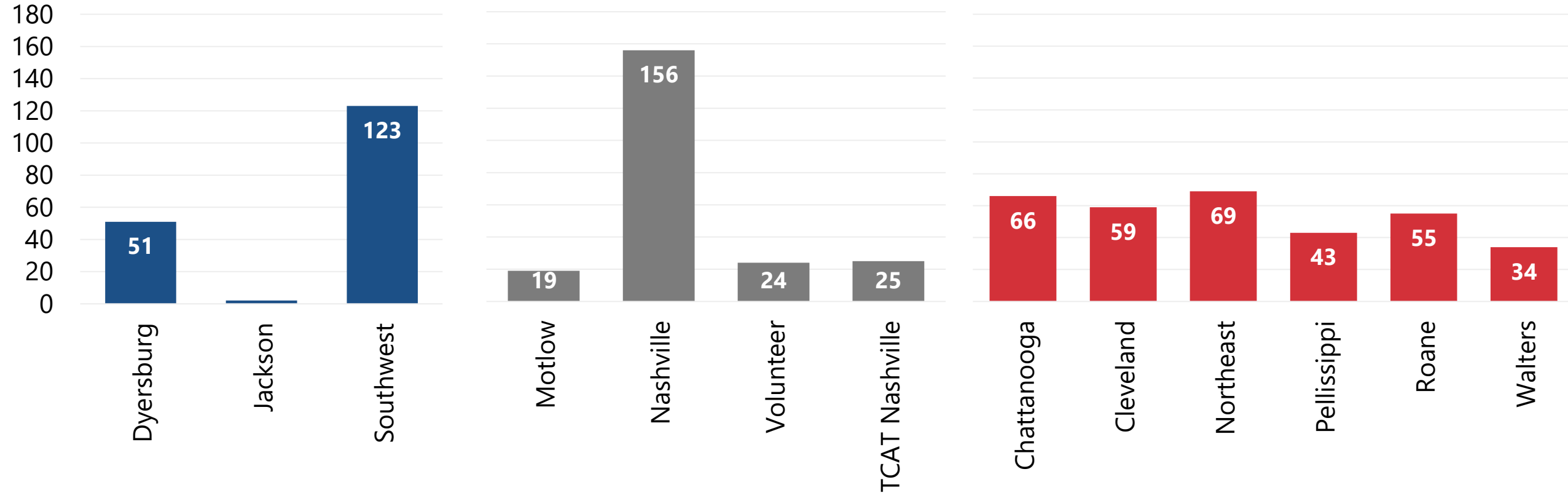


Number of Students Enrolled in Fall 2021

West Tennessee *176 students*

Middle Tennessee *224 students*

East Tennessee *326 students*



*Source: TBR end-of-term data. Includes AAS, certificate, and diploma programs at community colleges and TCATs. Fall 2021 data is preliminary and may increase by the end of the term. Enrollment totals include students at programs that will be terminated. Jackson State added the certificate program in 2020.

Most early childhood education students are female, and many are over age 25.



96% of students were female.

92% of credentials were earned by female students.



33% of students were Black or Hispanic.

22% of credentials were earned by Black and Hispanic students.



45% of students were age 25 or older.

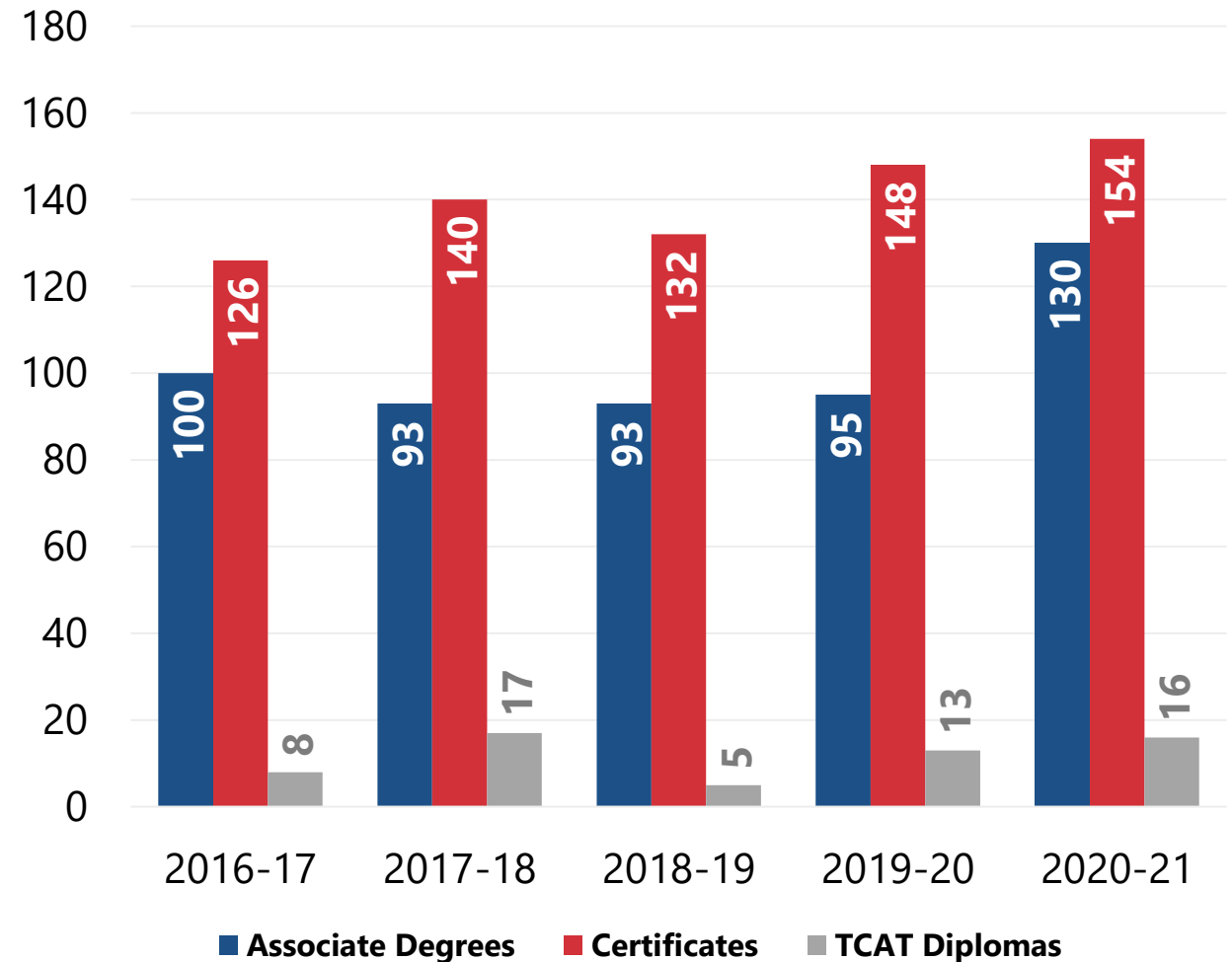
62% of credentials were earned by adult students age 25+.



The number of graduates in early childhood education programs has increased.



In the 2020-2021 academic year, students earned **300** diplomas, certificates, and associate degrees in early childhood education.

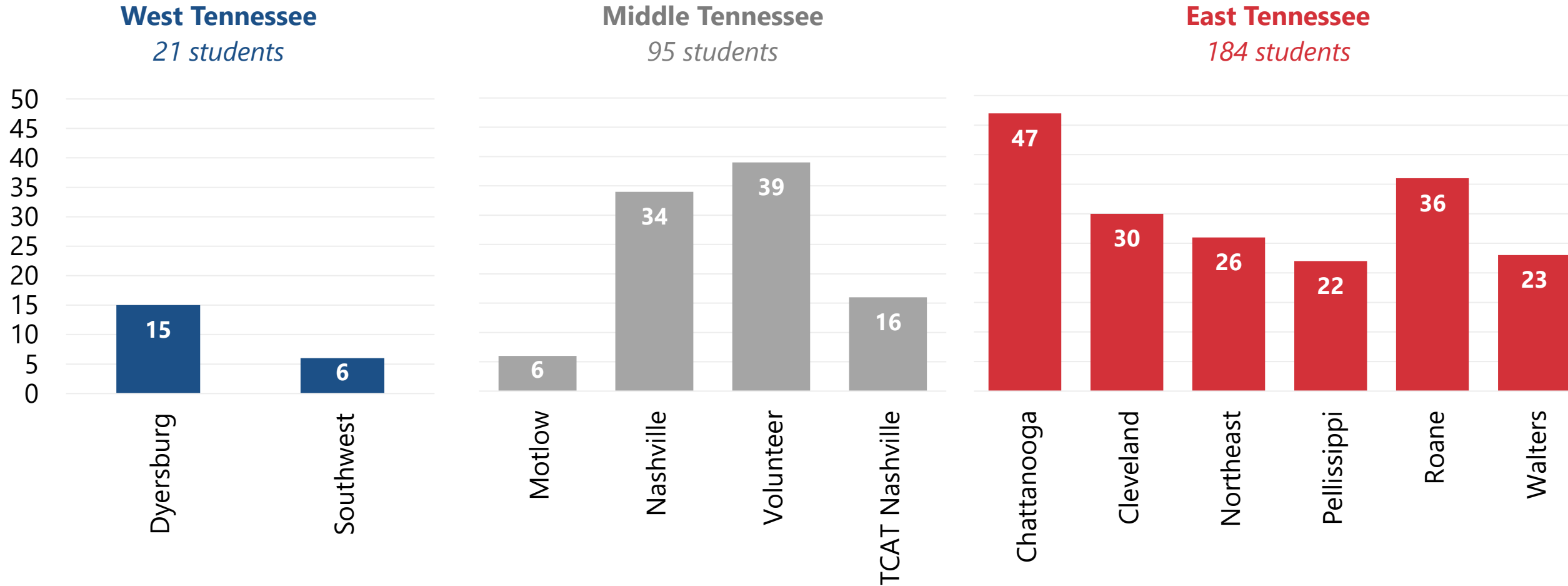


*Source: TBR end-of-term data. Includes AAS, certificate, and diploma programs at community colleges and TCATs. Award totals include students at programs that will have been or will be phased out.

Colleges in East Tennessee produced the highest number of early childhood education graduates.



Number of Awards Earned in 2020-2021



*Source: TBR end-of-term data. Includes AAS, certificate, and diploma programs at community colleges and TCATs. Award totals include students at programs that will have been or will be phased out.

Student Success in Early Childhood Education Programs



On average, graduates took **3.5 years** to complete associate degrees in early childhood education



In fall 2019, there were 486 early childhood education *concentrators* at TBR colleges. (These are students who had earned at least 12 credit hours toward their program—enough to show sufficient interest in the program.)
Of these students, 66% returned the following fall and 42% graduated within two years.



Pathways to Bachelor's Degrees

Tennessee Transfer Pathways

Ten TBR colleges offer programs designed to transfer to a university in Early Childhood Education.



Early Childhood
Education (Pre-K to 3)

TEN community colleges
offer Tennessee Transfer
Pathways (TTP) in early
childhood education.

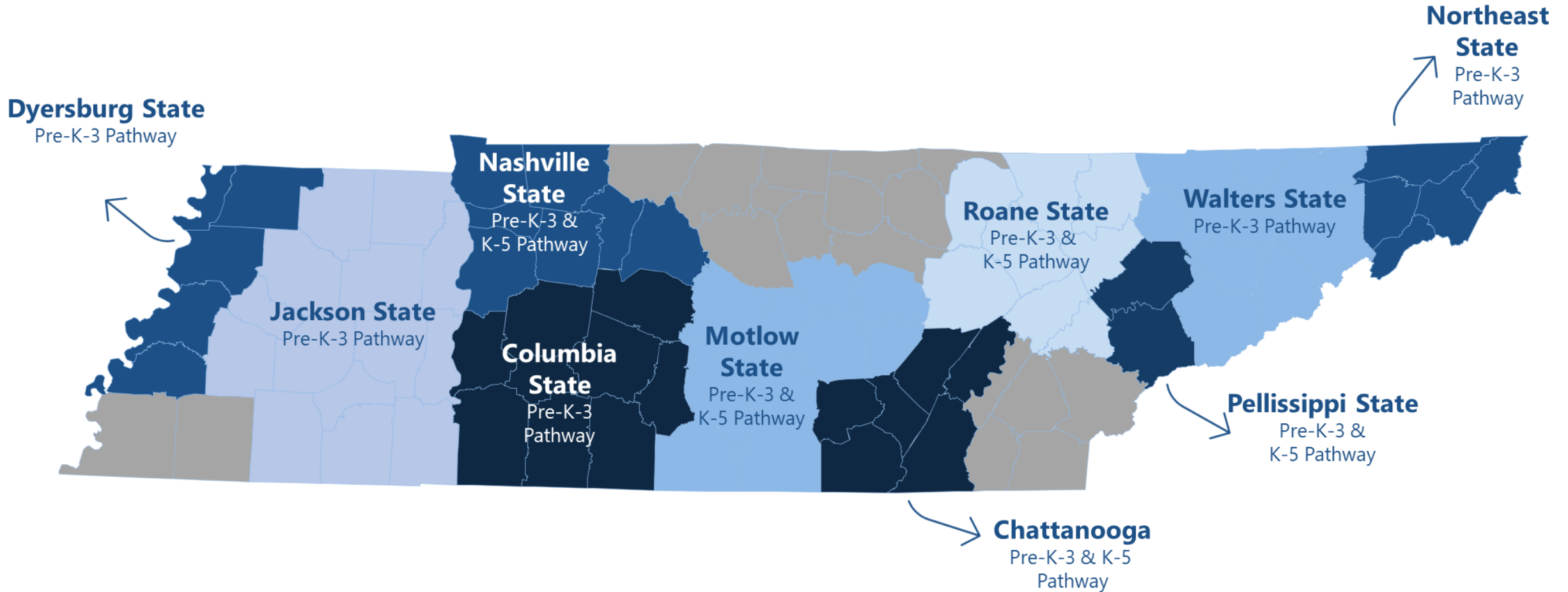


Elementary Education
(K to 5)

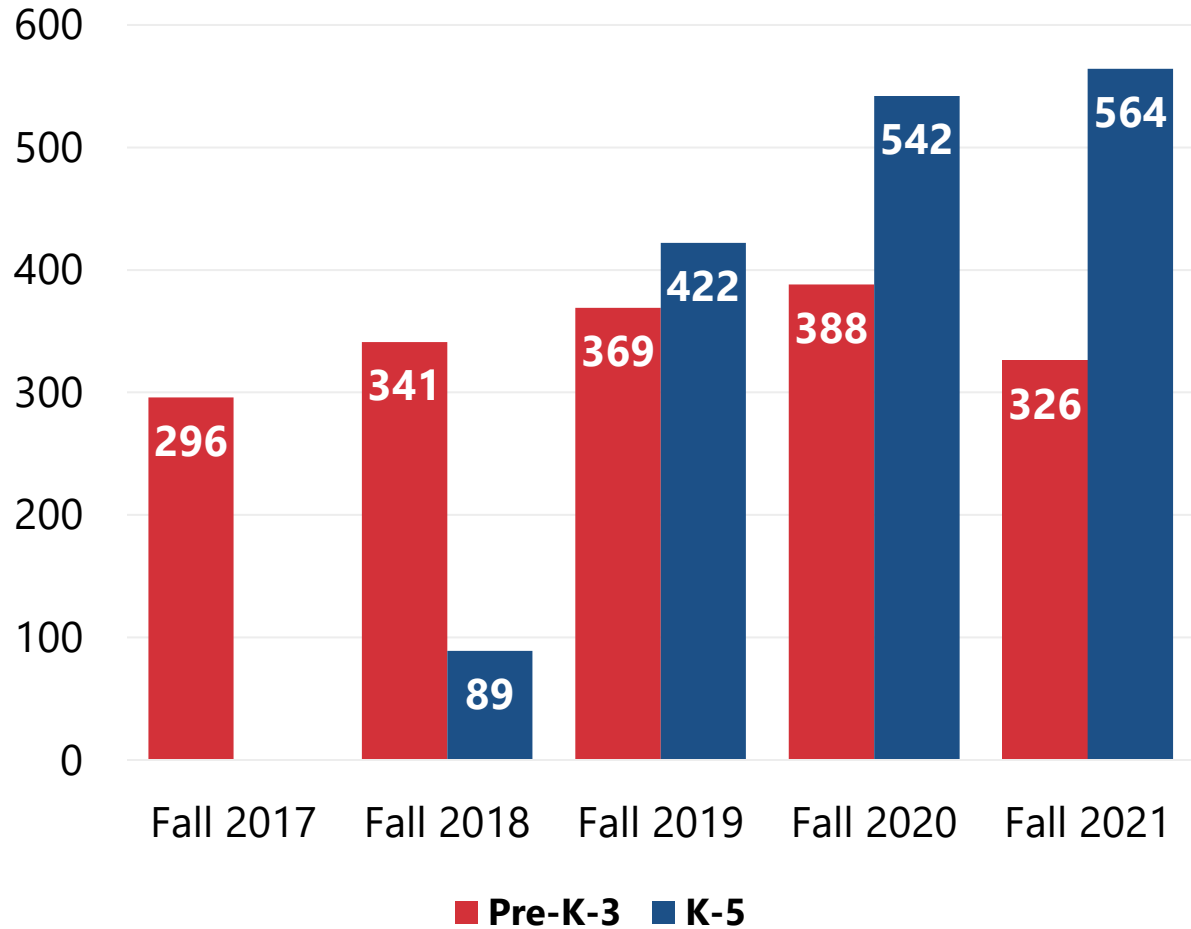
FIVE community colleges
offer Tennessee Transfer
Pathways (TTP) in
elementary education.

These programs are part of the **Associate of Science in Teaching** program and require approximately 60 credit hours to complete.
TTP programs are designed to transfer to a four-year university.

Ten TBR colleges offer programs designed to transfer to a university in Early Childhood Education.



890 students are enrolled in transfer programs in early childhood & elementary education.



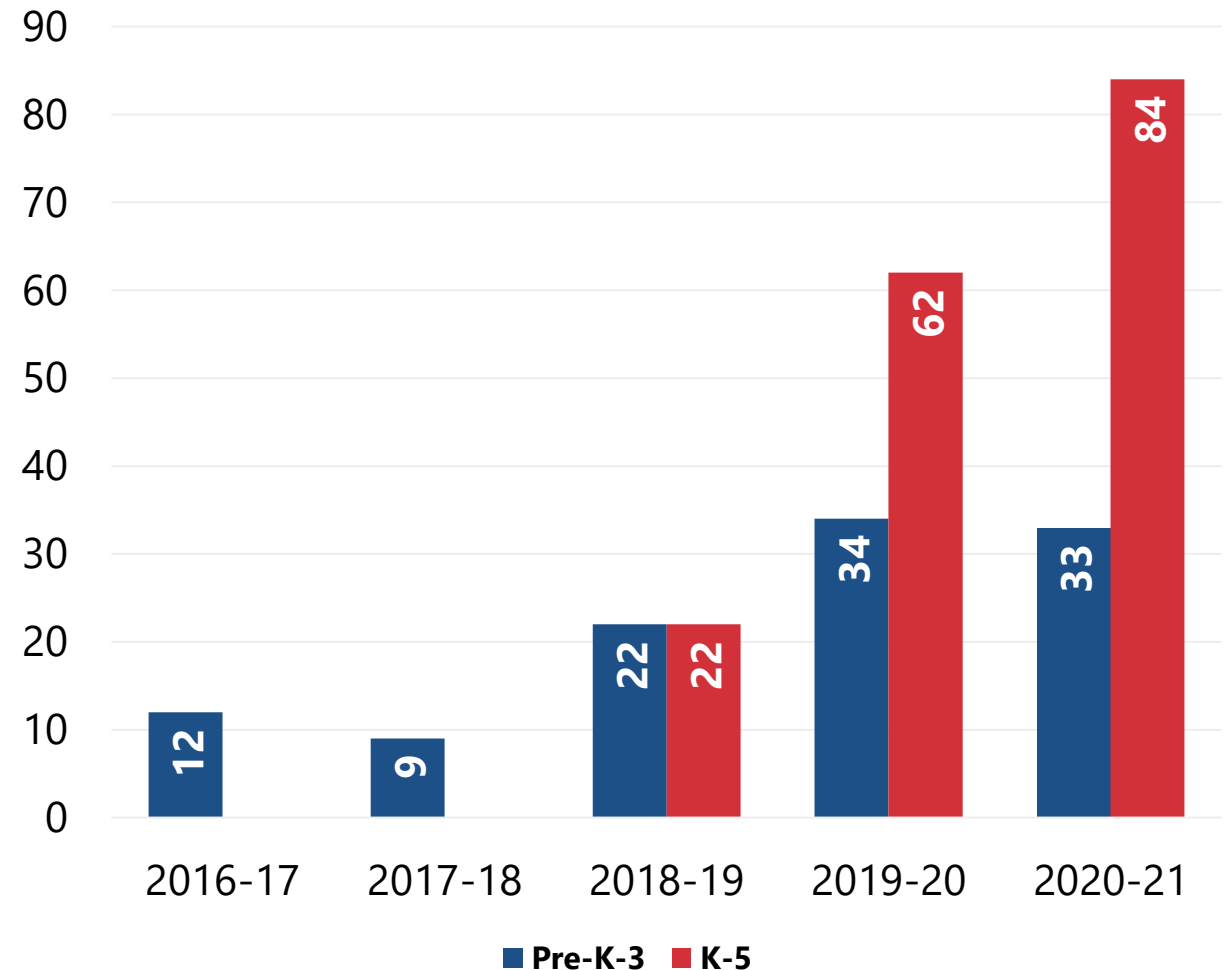
In fall 2021, 890 students are enrolled in early childhood and elementary education transfer pathways.

*Source: TBR end-of-term data. Fall 2021 data is preliminary and may increase by the end of the term. Enrollment totals include students in Pre-K-3 and K-5 concentrations within the Associate of Science in Teaching programs at community colleges.

The number of graduates from early childhood transfer pathways has increased.



In the 2020-2021 academic year, students earned **117** associate degrees in early childhood transfer pathways.



*Source: TBR end-of-term data. Includes AAS, certificate, and diploma programs at community colleges and TCATs. Enrollment totals include students at programs that will have been or will be phased out.

Child Care Talent Development & Retention

Child Care Resource Map Update

Concluding Remarks & Next Steps

Executive Session

Project Overview. The Contractor shall conduct activities to support the development of a strategic action plan for increasing the availability of high quality, affordable, and accessible child care in Tennessee, specifically in the context of the impacts of COVID-19 on families, child care providers, employers, and communities in Tennessee;

Project Schedule. No later than ten (10) calendar days after the Effective Date, the Contractor shall submit to the State a proposed Project Schedule for the State's review and approval. The Project Schedule shall include sufficient information to track project tasks, deliverables, dependencies, and resources to ensure accurate project status reporting.

Research.

In compliance with the purposes and requirements of the American Rescue Plan Act of 2021 (H.R. 1319), the Contractor shall examine the short, medium, and long-term impacts of COVID-19 on the demand for and availability of child care in Tennessee. The Contractor shall cite the sources of data consulted on this topic such as economic development and labor statistics.

The Contractor shall examine strategies to support the existing network of child care providers and to increase the supply of high quality, affordable, and accessible child care in communities where needed.

The Contractor shall examine and identify the most effective strategies adopted by other states to support the existing network of child care providers and to increase the supply of high quality, affordable and accessible child care. The scope of the Contractor's research shall include at least the following:

- A literature review of Federal, State, and private publications;
- A landscape assessment of other state models which identifies best practices and exemplar models, specific processes resulting in exemplar status, and highlights key findings and lessons learned in child care;
- Conversations with child care leadership staff in other states, as appropriate, to gain a more detailed understanding of their approach;
- The Contractor shall examine at least the following facets of other states' activities:
 - How long have their strategies been in place;
 - Measurable outcomes from those strategies (e.g., increase in number or providers, increase in volume of licensed capacity, decrease in attrition of existing child care agencies); and
 - Costs and funding streams associated with each strategy.

The Contractor shall write research notes and analyze data for input into the Final Report.

Child Care Task Force Meetings. The Contractor shall attend all regular and special meetings of the Child Care Task Force for the purposes of observation and to give presentations, at the request of the State.

Interim Progress Report.

No later than May 15, 2022, the Contractor shall deliver to the State an Interim Progress Report, in a form acceptable to the State, of its activities, findings and recommendations. The Contractor shall make a presentation regarding the Interim Progress Report to the Child Care Task Force at the request of the State.

The Contractor shall include in the Interim Progress Report such elements of information as the State may request, including but not limited to the following:

- Literature and statistics reviewed;
- Names and titles of Child Care Leadership Staff who were consulted in other States; and
- Other actions taken to support development of findings and recommendations.

Upon the Contractor's delivery of the Interim Progress Report, the State shall review the report and indicate changes that are necessary in the State's sole discretion. The Contractor shall comply with any such requests for changes within a reasonable time.

Focus Groups.

- a. After the Contractor has provided the Interim Progress Report and received feedback from the State about the initial recommendations, the Contractor shall hold three focus groups, with one focus group to include representatives from each Grand Division of Tennessee. During the focus groups, the Contractor shall solicit input from participants regarding the Contractor's proposed findings, conclusions, and recommendations. Contractor shall provide proposed focus group agenda, questions, and materials to the State for its review and approval. The State, in its sole discretion, will approve the agenda, questions, and materials. After receiving the State's approval in writing, the Contractor shall use the approved agenda, questions, and materials in the focus groups.

Focus Groups- cont..

To support each focus groups, the Contractor shall:

- Identify stakeholders for focus groups with the support of the State;
- Provide a list of stakeholders to the State for review;
- Manage invitee list and focus group registration;
- Develop detailed agenda for each focus group, including meeting purposes, introductions and information overview, discussion topics, and key research questions; and
- Write up focus group notes and analyze data for input into the Final Report.
- Within 5 business days of the conclusion of each focus group, provide a summary of each focus group meeting, including attendees, time and location of meeting, and summary of discussion and results

Focus Groups- cont..

Each focus group shall involve the following as participants:

Tennessee Department of Human Services staff;

Representatives of early childhood providers;

Representatives of parents/child care customers;

Representatives of CCDF Quality Partners;

Representatives from organizations representing the business community that do not provide direct child care services,

Representatives from local government and economic development agencies; and

Representatives of other State of Tennessee departments participating on the Child Care Task Force: Health, Education, Labor & Workforce Development; Economic and Community Development.

Final Report.

No later than November 1, 2022, the Contractor shall deliver to the State a Final Report, in a form acceptable to the State, of its findings and recommendations. All findings and recommendations shall be specifically tailored to the circumstances of families, child care providers, communities, resources, and government structures in Tennessee. The Contractor shall make a presentation regarding the Final Report to the Child Care Task Force at the request of the State.

The Contractor shall include in the Final Report such elements of information as the State may request, including but not limited to the following:

- An executive summary of the findings and recommendations;
- Information and data that support findings and recommendations;
- Findings and conclusions about child care needs in Tennessee including, but not limited to, the short, medium, and long-term impacts of COVID-19 on the demand for and availability of child care in Tennessee; and

Final Report- cont.

- A Full and complete strategic action plan with specific recommendations and proposed action steps including but not limited to the following topics:
 - Strategies to support the existing network of child care providers;
 - Strategies to increase the supply of high quality, affordable, and accessible child care in communities where needed;
 - Strategies to address the challenges of quality, affordability, and accessibility of child care in Tennessee;
 - Strategies to more effectively use public resources to address those challenges;
 - Strategies to build partnerships between government and the business sector, through which businesses are motivated to create and participate in strategies that address the child care needs of their employees and communities;
 - Strategies to streamline coordination between the Department of Human Services, Department of Labor and Workforce Development, Department of Economic and Community Development, Department of Health, and Department of Education in developing solutions to Tennessee's child care challenges; and
 - Recommendations for legislation deemed necessary to implement the strategic plan.

Upon the Contractor's delivery of the Final Report, the State shall review the deliverable and indicate changes that are necessary in the State's sole discretion. The Contractor shall comply with any such requests for changes within a reasonable time.

Reporting. The Contractor shall provide reports as detailed in this section.

The Contractor shall submit complete and accurate monthly reports in writing to the State no later than the fifteenth (15th) day of the following month. If the State so directs, then the Contractor shall arrange a meeting, conference call, or other opportunity to discuss the monthly report. The Contractor shall include the following in each monthly report:

Progress, as measured against the Project Schedule;

Services the Contractor completed in the reported month;

The services the Contractor plans to provide in the coming month; and

Any other issue meriting the State's attention.

Without limiting any other provision, the Contractor shall also provide ad hoc reports in such form and substance as the State may direct in writing. The Contractor shall deliver such information as is requested no later than seven (7) days after the State's request.

State Ownership. All deliverables under this Contract shall be deemed works made for hire of the State for all purposes of copyright law, and copyright shall belong solely to the State. To the extent any deliverable is not deemed to be, for any reason whatsoever, work made for hire, the Contractor agrees to assign and hereby assigns all rights, title, and interest, including but not limited to copyright, patent, trademark, and trade secret, to such deliverable, and the State shall own all right, title, and interest, including all copyright, patent, trade secret, trademark and other intellectual property rights, to the deliverables provided by the Contractor in connection with this Contract, including but not limited to documents, methodologies, models, templates, processes, testing assessment tools, reports, and proposals created, designed, developed, derived, documented, installed, or delivered by the Contractor to the State under this Contract.

Collaboration. The Contractor shall, as directed by the State and at no additional cost to the State, coordinate with, facilitate the prompt exchange of information between, and work collaboratively with, any and all other State contractors, State grantees, and state agencies. If required in order for the Contractor to proceed with any part of the SCOPE which involves sharing or obtaining information of a confidential, proprietary, or otherwise valuable nature with or from another State contractor or grantee, the State may request that the Contractor sign documents with those other entities, including but not limited to non-disclosure agreements, which are reasonably necessary to maintain cooperation and collaboration among and with any and all other State contractors, grantees, and state agencies in the performance of the Contract. The Contractor shall comply with all such State requests. Nothing in this section, including the Contractor's failure to negotiate and enter into a nondisclosure agreement or other Contractor failure to collaborate, shall be construed to relieve the Contractor of its duty to perform any requirements under this Contract. The Contractor shall not invoice the State for coordination services required under this section including without limitation the arrangement of NDAs, and the State shall not be liable to the Contractor for payment for any such coordination services.