UC Berkeley Equity and Excellence in Early Childhood

Nonprofit Preschools Shrink as Transitional Kindergarten Grows in California

Building Capacity to Serve Younger Children

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E3C and Berkeley Children's Forum, University of California – May 2026

Summary

California's landscape of child care and preschool options continues to evolve as civic leaders and policy makers seek to lift children and make family life affordable.

We know that a growing count of parents in Los Angeles County are enrolling their 4-year-old child in transitional kindergarten (TK). Middle-class families display the most enthusiasm for this pre-kindergarten program, households that faced high child care bills prior to finding free TK.

At the same time, the spread of TK exclusively in public schools contributes to the accelerating demise of nonprofit pre-Ks as they lose 4-year-olds to transitional kindergarten programs. Finding a center that serves infants, toddlers, or 3-year-olds is becoming even more difficult.

After releasing these findings in 2025—focusing on L.A. County – the Berkeley research team was pressed on several questions, issues that hold implications for policy designers and local practitioners. This research update offers additional evidence on these topics –

- **Do the dynamics earlier reported for L.A. apply to California statewide?**

  Yes, we find that communities enjoying greater TK expansion suffer from the closing of more nonprofit pre-Ks or licensed capacity to serve 3- and 4-year-old children across California.

- **Isn't the accelerating demise of nonprofit pre-Ks due in part to the declining child population?**

  Yes, communities hosting a steady decline in the count of preschool-age children suffer from a greater shrinkage of nonprofit pre-Ks. But after taking this effect into account, the rate of TK enrollment growth exerts a strong effect on the decline of nonprofit pre-Ks or licensed capacity to serve young children.

- **Do all counties face a shrinking count of nonprofit pre-Ks?**

  No, the rate at which nonprofit pre-Ks are closing varies significantly across counties. Beyond varying rates of child population decline and TK growth, we don't know how some counties have better sustained their nonprofit sector.

- **Have some nonprofits successfully pivoted to serving 3-year-olds, infants, and toddlers?**

  Yes, we highlight nonprofits that have swiveled to serve a wide range of children under 5, drawing on funding incentives and engaging a broad array of families.

A Shifting Child Care and Pre-K Landscape

The capacity of tuition-charging *(or private-pay)* pre-Ks to serve additional children was already slipping before the Covid pandemic. This sector lost about 21,000 enrollment spaces between 2014 and 2020 across California, a 6 percent decline. This stemmed from shrinking counts of young children in many parts of the state, along with an expanding set of publicly financed child care options.

Yet, the demise of pre-K programs—soon dragging down many publicly financed centers as well—accelerated as state leaders promised to deliver free and universal pre-K for all 4-year-olds and income eligible 3-year-olds, the latter raised in families earning under the state's median income. California policy makers in Sacramento endorsed this two-step plan in 2021, making all 4-year-olds eligible for TK by 2025, that is, preschool offered solely in public schools.

Yes, pre-K programs—whether run by community nonprofits or schools—would lose their 4-year-old clients to TK. But they could now pivot to serve 3- and even 2-year-old children by repurposing their freed-up capacity. This was the hope of policy makers and leaders in the early childhood field.

Box 1. Terminology: Nonprofit Preschools in Community Organizations and Schools

This brief focuses on "nonprofit preschool programs" that have closed their doors or given up their license to serve 3- and 4-year-old children, run by community groups, private firms, or school districts (but separate from TK). The community-rooted pre-Ks may receive public funding or operate solely through parent tuition and fees.

A small slice of licensed preschools operate within profit-making companies (e.g., Bright Horizons, KinderCare). These are included in our analysis of closed pre-Ks, but represent less than 2 percent of programs that no longer serve 3- and 4-year-olds.

A Berkeley analysis in 2025 reported strong growth of TK enrollments in public schools located in middle- and lower-income parts of L.A. County. It's within these communities that parents had faced expensive child care options and now benefit from free TK as their child turns 4 years of age. The rate at which nonprofit pre-Ks closed their doors (or stopped serving 3 and 4-year-olds) then accelerated post-Covid, especially in communities experiencing rapid growth of TK enrollments—in the case of L.A. County.

California's Master Plan for Early Education and Care, approved in 2021, forecast how nonprofit pre-Ks—now serving fewer 4-year-olds—would pivot to enroll additional 2- and 3-year-olds. Not more than one-third of the state's 3-year-olds enroll in any pre-K program.[1]

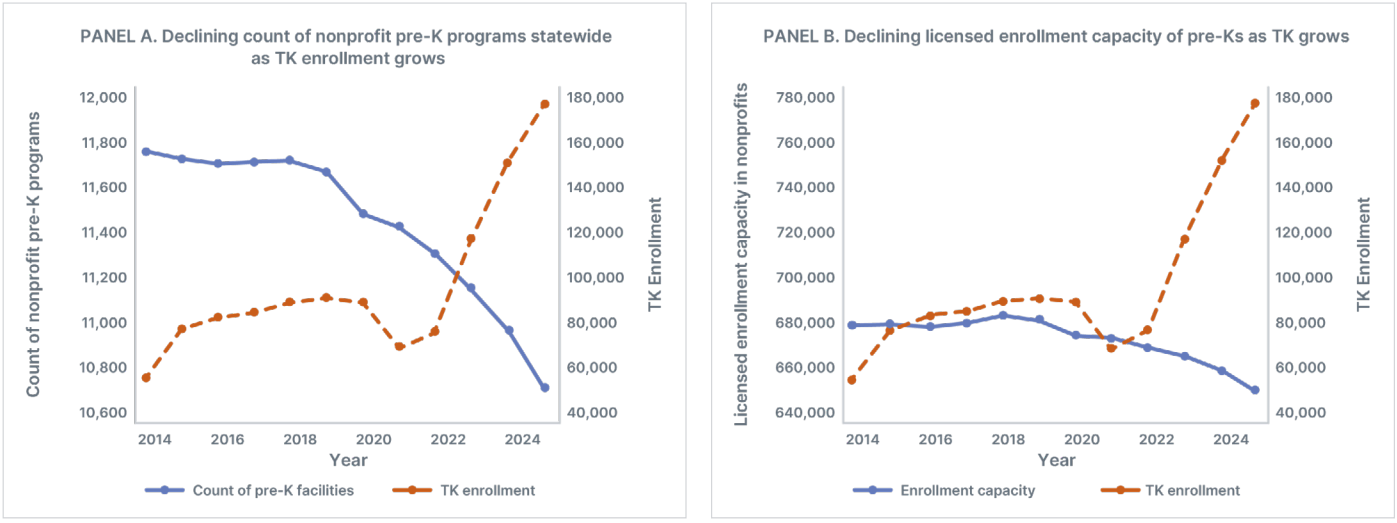
So, let's turn to how these trends are unfolding in California, moving beyond the earlier findings for L.A. County. We turn first to how the nonprofit pre-K sector has fared across California since the Covid pandemic.[2]

Declining Pre-K Capacity, Varying Among Counties

The early care and education field is shifting in three notable ways. First, TK enrollments continue to climb, rising to 213,000 children, 4 years of age, by fall, 2025. This represents just over half of all 4-year-olds statewide.

Second, as more 4-year-olds move to TK in the schools and birth rates fall, the demise of nonprofit pre-Ks has accelerated since the Covid pandemic. Figure 1 (Panel A) plots the growth of TK against the declining count of nonprofit pre-K programs. The number of pre-Ks held steady prior to the pandemic, when including both tuition-charging and publicly financed programs. California then experienced a net loss of about 1,100 pre-K programs between 2019 and 2025, as Covid hit the entire sector, co-occurring with a surge in TK enrollment as all 4-year-olds became eligible.

Figure 1. Correspondence between TK enrollment growth and erosion of nonprofit pre-K capacity



Panel B shows that TK enrollment grew to about 172,000 children in fall 2024 (before climbing to 213,000 in fall 2025). Nonprofit pre-Ks in turn lost about 32,000 seats for children 3–4 years of age since 2019. These counts equal the maximum number of preschoolers who could be served, not actual enrollments.[3]

In short, we see a clear association between the spread of TK enrollments and the declining enrollment capacity of nonprofit pre-Ks. The pandemic temporarily hit TK and nonprofit preschools alike. But as most preschools reopened, child counts kept falling and more 4-year-olds were migrating to school-based TK. A rising count of nonprofit pre-Ks shut down entirely or surrendered their license to serve 3- and 4 year-olds.

The association between TK growth and nonprofit pre-K decline varies among counties. Nonprofit pre-Ks in Los Angeles County, for instance, have lost about 6 percent of their enrollment capacity since 2019, falling from 172,000 to 160,000 enrollment slots (Figure 2). The nonprofit pre-K sector in San Diego County has shrunk by about 13 percent in licensed child slots since 2019.

Figure 2. Variation in county experiences with TK growth and nonprofit pre-K decline, 2014-2024

On the other hand, Orange and San Mateo counties have suffered little loss in the capacity of their nonprofit pre-K sectors. We do not know what factors explain this between-county variation. We do know that Latina women have experienced the greatest decline in birth rates over the past three decades, reducing demand for center-based preschool.[4] In addition, efforts by local agencies to sustain and strengthen the nonprofit sector may play a role.

A third shift in the early-childhood field may further explain the decline of nonprofit pre-Ks—the state's rising spending on child care vouchers, more than quadrupling the number of portable chits financed each year over the past decade. These so-called alternative payments have ensured affordable child care for tens of thousands of additional families with children 0–13 years. A portion of these portable vouchers finance care in pre-K centers. At the same time, the pursuit of universal preschool in California now unfolds within a wider set of less formal providers and organizational interests.

Is Child Population Decline the Culprit?

The falling count of children continues to disrupt the stability and financial health of California's local school districts. So too, fewer youngsters will inevitably lead a growing fraction of nonprofit pre-Ks to close over time.

But the policy-induced demise of nonprofit pre-Ks is worrisome, given how few California families with 3-year-olds can find an affordable preschool. Policy makers keep celebrating the benefits of a "mixed delivery system". Yet, the likelihood of finding a quality preschool for 3- or 2-year-old children has been shrinking in recent years.

Recent estimates of California's enrollment rate for 3-year-olds show that no more than one-third benefit from access to any pre-K program. In contrast, New York City provides publicly financed pre-K for about three-fifths of its 3-year-old children. East Asian nations, such as Vietnam, serve over 70 percent of their 3-year-olds in pre-K centers.[5]

Unanticipated Effects of TK Growth

To isolate the discrete effect of TK expansion on the rate at which nonprofit pre-Ks have closed, we conduct what's called an "event study", a method lending confidence that a causal relationship is being observed over time. This allows us to estimate the independent effects stemming from child population, demographic features of local communities, and the rate of TK enrollment growth.

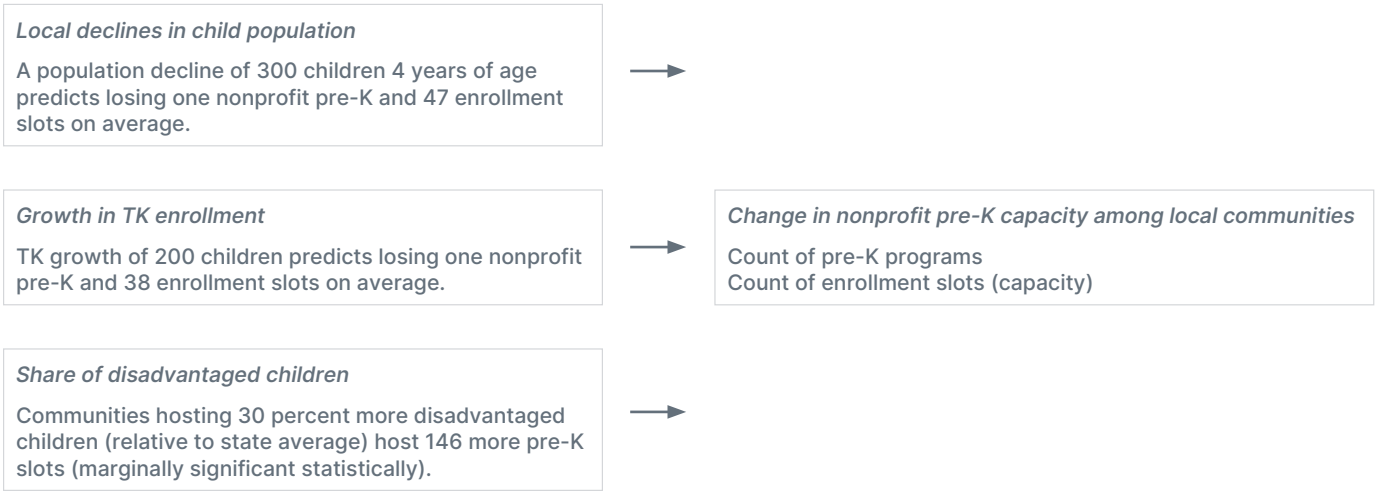
We carve California into local areas, each with a radius of three miles, then track the growth of TK enrollment and the annual rate at which nonprofit pre-Ks close their doors (or forfeit their license to serve 3- to 4-year-old children). We then estimate whether TK enrollment contributes to the decline of nonprofit pre-Ks across 6,769 local communities statewide, after accounting for change in child population and demographic factors during the post-Covid period.[6] [Statistical models available from the authors.]

This analysis yields estimates of the magnitude with which each factor contributes to the decline in the count of nonprofit pre-K organizations and their enrollment capacity among the state's local communities. Figure 3 reports the estimated effects of population decline, demographics, and TK enrollment growth for the more than 6,000 communities, including all local areas in which families find at least one pre-K program within three miles.

Child population. Recall that the enrollment capacity of nonprofit pre-Ks was not declining prior to the pandemic. This likely stemmed from rising public investment in the sector. But then, population decline, the Covid jolt, and migration of 4-year-olds to TK may have packed a punch, eroding the vitality of nonprofit pre-Ks.

For example, Figure 3 (top box left) reports that population decline did exert a significant dampening effect on the vitality of pre-Ks. A decline of 300 children 4 years of age in the prior year—during the post-Covid period, 2021 to 2025—predicts losing one nonprofit pre-K and 47 enrollment slots on average.[7] This estimate is precise and highly significant among the state's local communities ($p<.001$).

Figure 3. Magnitude of TK effects: Factors independently contributing to pre-K capacity declines and closures among California communities between 2021 and 2025 (with all control variables in the statistical model)



TK enrollment growth. After taking into account population decline, we then estimate the independent effect of TK growth across local areas. When public schools enrolled 200 additional children into TK, one nonprofit pre-K closed, and 38 enrollment slots were lost on average. So, pre-K vitality proves markedly more sensitive to TK enrollment growth than population decline.

The fact that 38 child spaces were lost per organizational closure suggests small programs are most vulnerable to TK expansion. These estimates are precise and highly significant statistically ($p<.001$)

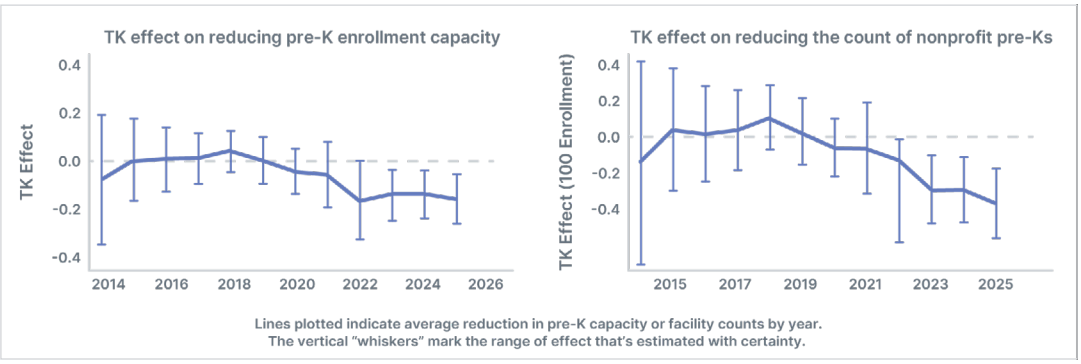
Enrollment of disadvantaged children. To gauge overall effects of child demographics, we estimated whether a 30 percent greater share of TK children deemed disadvantaged might affect the population of nonprofit pre-Ks (third box left, Figure 3). Communities with greater shares of low-income families might benefit from stronger supply of publicly financed pre-Ks.

We found that communities hosting 30 percent more disadvantaged children host 146 additional pre-K slots, compared with the state average. This may indicate that public investment has raised the supply of nonprofit pre-Ks, relative to economically better-off areas, the latter now suffering from declining counts of tuition-charging preschools. (This estimate is marginally significant statistically, $p<.11$).

We can also look descriptively over time, plotting the magnitudes with which TK enrollment growth eroded the life of nonprofit pre-Ks. Figure 4 shows how the transitional kindergarten effect was not significant in the early years of TK enrollment expansion, when only portions of 4-year-olds were eligible.

Then, beginning in 2022, TK enrollment growth exclusively in public schools began to erode the vitality of nonprofit pre-Ks. By 2025, the TK effect reached a modest 0.30 of a standard deviation, after taking into account child population, local demographics, and fixed effects of unobserved features of each local community.

Figure 4. Intensifying effect of TK enrollment growth on declining nonprofit pre-K capacity, 2014-2025



Cascading Collapse

Thus far we have estimated the discrete effect of TK growth on the capacity of nonprofit pre-Ks to serve 3- and 4 year-olds. In addition, we identified the effect on *total* capacity of nonprofit pre-Ks, including licensed capacity for infants, toddlers, preschoolers, and after-school programs.

These effects proved even stronger: total enrollment capacity and the count of pre-Ks declined even more as TK enrollments grew across local communities, compared with the decreasing capacity to serve only preschoolers. This is partially due to the greater count of centers when one includes those serving infants, toddlers, and kids after school. Overall we found the magnitudes of TK-growth effects were stronger when including all three license types.

In other words, the TK-growth effect spills over to the ability of nonprofit pre-Ks to serve all age groups. Losing their 4s to TK directly erodes the organization's strength for the 3-4 age cohort. This stress then appears to carry over to a center's likelihood off surviving or closing entirely.

What Types of Pre-K's are Most At Risk?

Our team identified the 503 nonprofit pre-K programs that closed their doors or surrendered their license to serve 3- and 4-year-olds between 2021 and 2024 in L.A. County. These data come from licensing information maintained by the state Department of Social Services. We endeavored to discover the types of nonprofit pre-K programs that proved at-risk in the wake of the pandemic, as child population declined and TK enrollments climbed.

Small tuition-charging programs displayed the greatest incidence of closing their doors or relinquishing their license to serve preschool-age children. In 2021, nearly three-fourths (74 percent) of all programs closing were tuition-charging programs. Many were small 'mom-and-pop' programs enrolling 30 or fewer children. Pre-K programs situated in religious institutions took a significant hit.

Yet, in the following year (2022) an increasing count of publicly financed pre-K programs began to close down. This included pre-K efforts hosted by public schools, and those financed via Head Start or the California State Preschool Program (CSPP). It appears that some school districts were realigning their early-childhood offerings, consolidating around TK.

The share of closed pre-Ks that had charged tuition fell to 61 percent in 2022 and held steady at about that level through 2024. That is, a rising share of programs closing had received public financing from state or federal sources.

The expiration of these publicly financed pre-Ks was not due to insufficient funding. State agencies were returning unspent state dollars for CSPP and General Child Care (CCTR) during much of this period.

What's Working? Pre-K's Pivot to Younger Children

The early childhood landscape has shifted markedly since the pandemic)—expanding TK enrollments and the growth of home-based caregivers with additional vouchers. At the same time, state policy makers have tried to keep their eye on the prize: financing free preschool for all 4-year-olds and income-eligible 3-year-olds.

To understand how pre-K providers have adapted to these dramatic changes across the sector, we interviewed 10 nonprofits or school districts that host pre-K programs, each a contractor with the California State Preschool Program (CSPP).

All but one of the providers we interviewed were actively pivoting to serve younger children. A few receive Early Head Start funding or serve private-pay families. For the seven community nonprofits, each offered no fewer than nine hours of care per day. Some had long operated infant and toddler programs, pivotal in their widening efforts to serve additional younger children.

Box 2. Palmdale-Lancaster Serves More Children, 0-3, Year-Round

The Child Care Resource Center (CCRC)—their headquarters situated on the San Fernando Valley's west edge)—distributes vouchers to thousands of parents each year, ensuring affordable settings for their children. This large nonprofit also runs 38 high-quality centers, serving kids 0–5 years of age, located from Chatsworth to San Bernardino.

"About eight years ago we began shifting to serving younger kids," Betty Zamorano-Pedregon told us. She serves as CCRC's director of early care and learning. TK was draining their center counts of 4-year-olds, and the need for infant-toddler care was unmistakable, especially in fast growing suburbs like Lancaster and Palmdale.

Betty and her team artfully weave together Head Start funding, along with State Preschool and General Child Care (CCTR) dollars, to host 1,447 children 0–4 years of age in the Valley and farther north. About one-fourth of these youngsters enjoy full-day, year-round care, including infants and toddlers.

Families opting for part-day programs, or those limited in the summer, can receive vouchers (alternative payments). That is, CCRC enjoys the advantage of mending together center-based settings with vouchers for after-school or wraparound care.

Swiveling to younger children and away from 4s took planning and steady determination. "I'll be honest with you, it wasn't easy at first," Betty said. Teachers were not accustomed to caring for 2-year-olds)—diapering, musing over what activities were developmentally appropriate, how much risk to afford outside on slides and climbing structures.

Yet, Tameka Brown, the assistant director, mobilized training opportunities for teachers. CCRC paid for teachers to obtain necessary college units related to infant-toddler development. Consultants helped shape invigorating learning activities for children. Outdoor facilities were retooled for toddlers, licensing for infant-toddlers was achieved.

"Now our teachers love their toddlers," Tameka told us. "They see that they are the ones who spur remarkable growth in their children."

CCRC partners with family child care homes, ensuring nearby spaces after hours or when children are not age-eligible to enter TK. Expert coaches visit home providers to enrich learning activities and facilities.

"Many of our families don't want to leave (when their child turns 4)," Tameka said. "Demand for TK seems to be leveling off."

As one provider put it, CCTR and CSPP funding "fits hand-in-glove". For these providers, any increase in enrollment of 3-year-olds in the State Preschool Program grew from infant and toddler enrollment as they aged into preschool-eligibility. These organizations focus marketing efforts on attracting younger children—but not explicitly for 3-year-olds.

LAUSD is the largest CSPP program in California, reporting that 2- and 3-year-olds now account for over half the enrollment in this district's pre-K program. LAUSD officials attribute much of this growth to extended hours and major community outreach efforts, noting that extending eligibility to 2-year-olds was also helpful.

Other school districts fit together State Preschool or CCTR funding to invite in families with toddlers or preschoolers in the years before entering TK. Pomona reported they were fully enrolled last year after converting some preschool programs to accommodate greater infant and toddler enrollment, noting that other preschool classrooms were converted to TK.

In sum, offering longer hours, marketing and community outreach, and expanding services for infants and toddlers are major drivers of growth in 3-year-old enrollments. However, small providers often lack resources for major outreach campaigns (e.g. neighborhood canvassing). Beyond outreach, several providers reported that various innovations--like offering therapy for parents—were important in attracting families, supported by creative fundraising.

Explaining the Sticky Pivot to Younger Children

We also asked these pre-K programs about the challenges that remain in swiveling to serve younger children. Several factors were mentioned repeatedly)--

Staffing. Most providers emphasized workforce challenges, such as retaining entry-level staff who can find higher wages at employers like Costco or Target. Many pre-K directors are hesitant to raise wages, citing financial uncertainty. Some reported losing teachers who left for TK jobs. Some teachers accustomed to preschool classrooms are reluctant to work with younger children, including 3-year-olds. As one provider stated, "Toileting is a challenge, and we have had to shift [our thinking] on what is developmentally appropriate for 3-year-olds."

Facilities. Rents and other facility issues spurred concern for several pre-K providers. Keeping rental costs low is paramount, and many providers work to negotiate below-market rents with churches and other community groups—but historical arrangements often come with aging facilities that require improvements. One director reported that a leased classroom had been delayed for two years over permitting issues, while another was held up for eight months pending licensing. Some providers reported losing classrooms to TK.

Uneven family demand. One pre-K provider noted difficulties with outreach to families who prefer to keep their 3-year-old at home. The notion of enrolling 3-year-olds may be new in communities where preschool access has been limited to 4-year-olds.

Funding. Relative to other issues, few providers reported funding challenges or concerns about per-child reimbursement rates, though uncertainty around enrollment gave smaller providers pause over whether to reopen closed classrooms. Others, who do not serve children younger than 18 months of age, noted that they could not afford to serve infants at current funding levels.

When asked about funding, several providers worried about ever-changing regulations, now pressed by two separate state agencies. One director was unaware of increases in reimbursement rates. Another stated, "We're lucky I have an accounting background" in reference to challenges with handling contracts with multiple agencies.

Overall, low wages, staff turnover, and applicant scarcity, along with novel classroom demands tied to serving younger children, offer the greatest challenges to expanding early learning programs.

Box 3. Serving More 3-Year-Olds – The State Creates New Child Spaces Near Santa Rosa

Jeremy Decker, Windsor Unified's youthful superintendent, was excited to expand TK and serve a growing count of 4-year-olds in this medium-size district just north of Santa Rosa. Why not go "all in" and create a brand-new pre-K program for 2- and 3-year-olds, as education services director Jessica Borland said.

That's what Windsor Unified has done in two short years, thanks to first-ever funding from Sacramento under the State Preschool Program. Windsor's TK effort now serves 192 children 4 years of age until 1:45 in the afternoon, followed by extended-day options for kids from lower-income or private-pay families. For families with 2's and 3's, they now enjoy Windsor's pre-K program from 7:30 to 5:30.

Borland learned to fly as the plane was being built. "When I called CDE, they kindly answered my questions," she told us. And she was a quick study, with help from district staff, learning about CSPP rules and restrictions and how to blend TK and supplemental funding.

"Since we were brand new, we didn't have the barriers that older programs have," instantly serving a growing count of 2's and 3's, Borland said. The district found TK and pre-K teachers with required units in child development. A new effort by the local community college produces additional pre-K teachers, along with a pipeline of apprentices moving up from the local high school. "We are trying really hard to grow our own," Borland said.

Windsor has quickly put the CLASS observation tool in place to advance quality. "It's taught me what to look for when I enter a [preschool] classroom, and teachers find it helpful in improving practice," site coordinator Sascha Anschutz said.

The state's liberalized eligibility cap—up to about $120,000 for a family of four—is a godsend for middle-class families, previously ineligible for state preschool. Unmet family demand remains stiff as housing expands rapidly and new kids arrive to Windsor.

The local planning council had declared Windsor a "child care desert," and the state education department took that seriously. Rather than returning unspent CSPP dollars to the treasury, the department helped Windsor create an entirely new program for 2- and 3-year-olds, synched with Windsor's popular TK program.

Policy Implications – Helping Pre-K's Pivot to Younger Children

A rising share of young children enjoy free preschool across California—in the form of transitional kindergarten—reaching just over half the state's 4-year-olds in the current school year. Little is known about the quality of TK, how it varies among school districts and with what long-term effects on children's early growth and learning.

Another one-fourth of the state's 4-year-olds attend pre-K, hosted by the State Preschool Program (CSPP), Head Start, or private-pay centers, according to available estimates.

At the same time, no more than one-third of California parents raising a 3-year-old can find an open slot in any form of preschool. The supply of quality centers for infants and toddlers remains even more scarce.

In this context, the demise of so many nonprofit pre-Ks remains worrisome. The pandemic's shock to the sector, along with a declining child population and the steady spread of TK, have conspired to erode nonprofit pre-Ks, many long established in local civic and religious organizations.

Policy makers intended to see these nonprofits pivot to serve younger children. This is happening in some communities, especially among large nonprofits with the awareness and savvy to win new revenues, adjust their workforce, and renovate classrooms. But again, about 1,100 nonprofit pre-Ks statewide have been unable to adapt, closing their doors to preschoolers, since the pandemic.

What Can Policy Makers Do?

The governor and state lawmakers have acted decisively to bolster the nonprofit sector, aiming to foster a shift to infants, toddlers, and 3-year-olds – the pivot to younger children forecast by the Master Plan for Early Education and Care, approved in 2021:

- Boosting per-child allocations by 80 percent for each 2- and 3-year-old served, relative to subventions allocated to local pre-Ks for each 4-year-old child.
- Making 2-year-olds eligible to enter pre-Ks funded by the State Preschool Program (CSPP).
- Liberalizing which families are eligible for free pre-K, moving the maximum family income to match the state's median income.
- Discontinuing pandemic-era "hold harmless" funding, which has likely discouraged some nonprofit pre-Ks from shifting to younger children.

Yet, the pivot to serve younger children continues to unfold slowly, in part due to institutional "stickiness" displayed by state agencies, local licensing offices, and pre-K organizations. Policy makers can address a subset of these hurdles, including simplifying the contracting process, which remains fragmented and burdensome, now spread across education and social services departments in the state capital.

Clear and steady information for parents about new options could spur demand for pre-K among parents with children 0–3 years of age. California leads the world in sophisticated technology. Yet, parents cannot find a simple way to identify where pre-K and child care openings are available nearby. Our interviews revealed that some resource and referral agencies do not include CSPP sites or TK slots in their data shared with families.

Applying for CSPP and other public programs is a daunting task that requires a mountain of forms. In contrast, parents knock on the door of school principals, then instantly admitted into TK. The legislature has approved deeming parents eligible if at least 80 percent of students in their community are designated as disadvantaged. But many school districts fail to post school attendance zones on easily accessed websites.

Over time, additional funding for serving younger children 0–3 years of age will be required. But in recent years, both the state education and social services agencies have returned unspent dollars, funding that was appropriated at least in part to grow more pre-K slots.

What Can Local Activists and Agencies Do?

Local child care agencies—planning councils, First 5 offices, resource and referral agencies—are helping to advance universal pre-kindergarten through a mixed delivery system. Some local agencies, like the Los Angeles Planning Council, have designed implementation kits to help nonprofit pre-Ks make the pivot to younger children.

Some resource and referral agencies are exploring simple and sophisticated websites in which a parent can instantly see where child care and pre-K slots are available, discern any private cost, and see basic quality indicators.

Inventive nonprofits are building cooperative programs with school districts, rather than competing for a shrinking count of children. From San Jose to West Covina, our interviews uncovered collaborative efforts where nonprofits site new pre-Ks on school campuses, host after-school offerings for TK kids, or provide extra supports for disabled preschoolers. The Los Angeles Unified School District recently approved a plan to situate community-rooted infant and toddler programs on shuttered school campuses.

The worry is that California policy makers rest on their laurels, satisfied with the spread of free preschool for 4-year-olds in public schools. Meanwhile, the sector's capacity to serve younger children continues to shrink, losing momentum in making high-quality child care and pre-K affordable for more families. The richness of civil society may well suffer as hundreds of human-scale organizations serving families simply disappear.

Endnotes

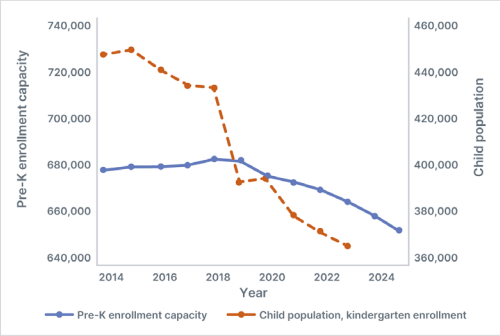
[1] The 2025 Berkeley analysis reviews two estimates for the enrollment rate of 3-year-olds in California. More recently, the Learning Policy Institute estimated that publicly financed pre-K programs enroll 21 percent of the state's 3-year-olds. This excludes 3's attending private-pay preschools for which an exact count is unknown. Melnick, H. & García, E. (2026). *Universal PreK expansion: How many 3- and 4-year-olds does California enroll?* Palo Alto: Learning Policy Institute.

[2] We distinguish *public school*-based pre-K programs versus those operated by *nonprofit organizations*, the latter financed by the California State Preschool Program, state General Child Care funding, child care vouchers, Head Start, or tuition and fees charged to parents.

[3] An earlier Berkeley analysis showed that capacity in *private-pay* pre-Ks was declining at a moderate rate prior to the pandemic, based on data collected by the California Child Care Resource and Referral Network. The present brief shows steady capacity when including publicly financed pre-Ks, corresponding to the state's increasing "market share" of all pre-K programs.

Figure A1 shows that total pre-K center capacity did not decline, pre-Covid, even as kindergarten enrollment counts were dropping.

Figure A1. Pre-K licensed capacity held steady pre-Covid, even as child population declined



[4] Since 1990 the average number of live births per mother in Los Angeles County has fallen from about 2.7 to 1.7 during their child-bearing years. This decline has been powered largely by the rising education attainment of Latina mothers, with average years of schooling completed rising by two years (at least one year of college). These trends earlier reviewed in: Fuller, B. (2022). *When schools work: Pluralist politics and institutional reform in Los Angeles.* Baltimore: Johns Hopkins University Press.

[5] For New York City, data presented in: Gossett, E. (2022). Freeze tag: A snapshot of pre-K and 3-K students in NYC. New York: Independent Budget Office. For east Asia, see: World Bank (2026). Quality at scale: Viet Nam's early childhood education and care system. Ha Noi.

[6] Building on research conducted in New York City, we divide California into 6,769 geographic areas, each with a radius of three miles surrounding a center point. Within these local area we then assemble data on TK enrollments, counts and enrollment capacity of all pre-K programs, and a variety of demographic features.

[7] We utilize counts of kindergartners in each year prior to the year in which we estimate the local count and capacity of nonprofit pre-Ks, since these data come from the state education department. Estimations using U.S. census counts of young children yield near-identical results.