

earlymatters
SAN ANTONIO

2025



Impact Report

Introduction

Building Momentum Together

Greater San Antonio Community,

From 2022 through 2024, the San Antonio community united around a shared belief that the future of our community depends on the strength of our early childhood system. Community leaders, educators, providers, funders, and public partners worked collaboratively to develop a comprehensive Early Childhood Impact Plan rooted in shared priorities and collective responsibility.

In 2025, the community moved from planning to action.

Partners across the region launched the first year of implementation with a clear focus on improving access, affordability, and quality across the early childhood education system. This report serves as the first annual update on that work.

Over the past year, early childhood education has evolved as families' needs shift and providers navigate workforce and capacity challenges. Partners have focused on long-term system improvement, strengthening collaboration, refining strategies, and enhancing coordinated action.

This report provides visibility into how partners are advancing the Early Childhood Impact Plan, highlighting growing momentum, community learnings, and tangible progress of collective efforts.

The community has made meaningful progress, and important work remains. The success of San Antonio's children, the stability of their families, and the long-term economic vitality of the region depend on a strong early childhood system. Continued partnership, leadership, and investment will remain essential.

Now, more than ever, the community's success depends on collective action. Let's continue to build momentum together!

Onward,



Mark Larson
Executive Director



Kindergarten Readiness

A Shared Community Outcome

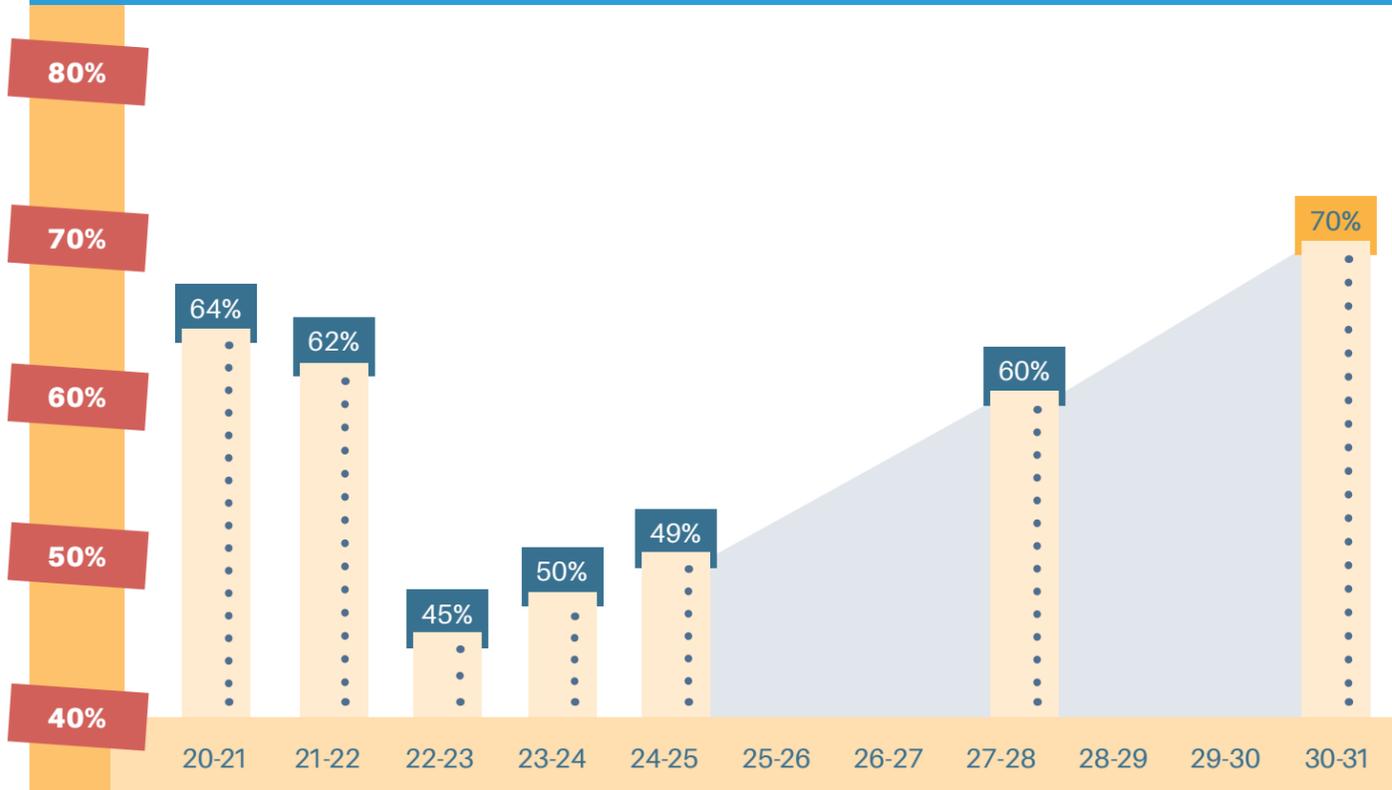
Kindergarten readiness is the headline goal of the Impact Plan: 70% of Bexar County children will enter kindergarten ready to learn by 2030. Progress depends on sustained alignment and investment across early childhood education, family support, workforce development, public education, business, civic leaders, and philanthropy, recognizing that readiness takes shape long before a child enters a classroom.

70% of Bexar County children will enter kindergarten ready to learn by 2030

Rather than serving as a standalone metric, kindergarten readiness functions as a shared reference point driven by multiple factors. Together, these factors help the community assess whether the conditions exist for children and families to thrive.

Our Headline Goal

70% of all Bexar County Children are Kinder-ready by 2030



BEXAR COUNTY KINDERGARTEN-READY

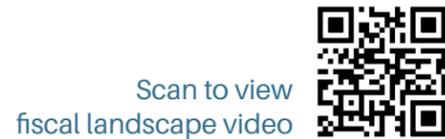


The Early Childhood Landscape in Bexar County

Building Momentum Together

To better understand the San Antonio Early Childhood Landscape Study, Early Matters built on research done by Dr. Melissa Jozwiak (Texas A&M University - San Antonio) for the City of San Antonio in January 2025. In collaboration with partners, a systemwide fiscal map was developed describing the total number of children in the early childhood education system in 2024, the number and size of the key public sector providers and assistance programs, and the size of the sector in dollar terms. Together, these data points illustrate the scope of early childhood education in Bexar County and the conditions shaping how families, providers, and the workforce experience the system.

This analysis reveals several system-level observations:



Bexar County Capacity

61,000 out of 132,000 children under the age of five, leaving **71,000** not accessing formal structured care

Cost to Families:

39,000 out of 61,000 in programs that offset family costs, leaving 22,000 to pay full cost

Largest Programs:

1. Public Pre-K (19,000 children/year)
2. Child Care Services (9,000 children/year)
3. Head Start (8,000 children/year)
4. Pre-K 4 SA (2,000 children/year)
5. Early Head Start (1,000 children/year)

Total Out-of-Pocket Cost to Families:

\$229.1 Million

Combined Investments:

\$370.7 Million

TOTAL EARLY CHILDHOOD SECTOR SIZE: \$600 Million Annually

In Bexar County, existing childcare capacity reaches only a portion of young children, leaving many families without access either by choice or because options remain limited or inaccessible. Public programs play a critical role in offsetting costs, yet many still pay the full cost of care out of pocket. These expenses create financial strain that affects workforce participation, while others reduce hours or leave the workforce because childcare costs outweigh earnings. Publicly funded early learning programs form a backbone of access for thousands of children, while families continue to shoulder the largest share of the financial responsibility. Together, public investment and family spending reflect the scale and economic significance of the early childhood sector and underscore the importance of strengthening systems that support children, families, providers, and the workforce.

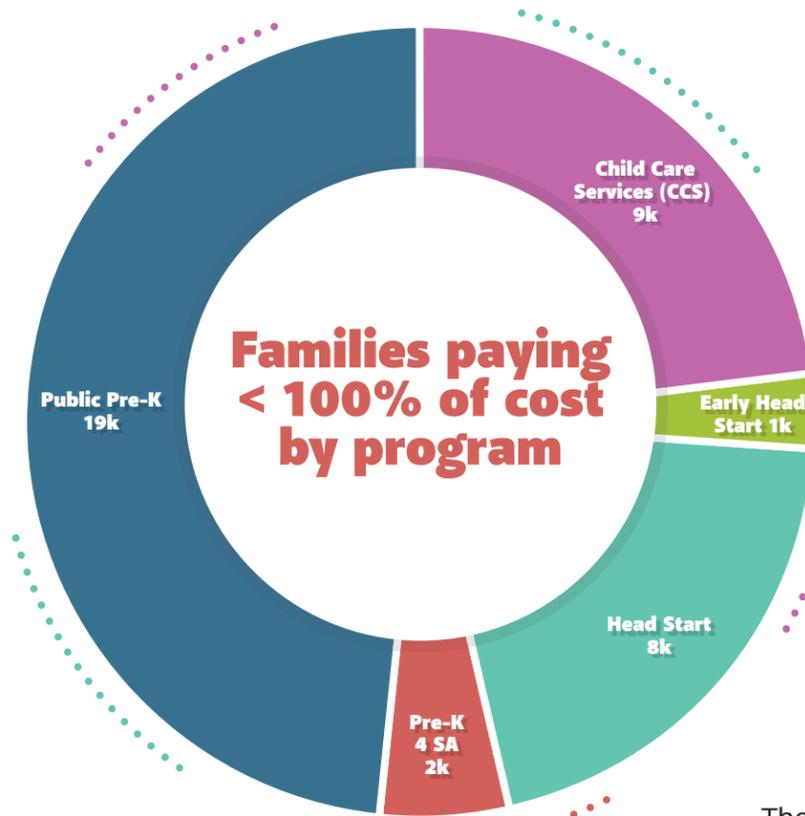
22k Pay 100% of Cost

\$10k

Average Cost of Childcare in San Antonio Per Year

\$229.1M

Annual Amount Families Are Paying Per Year



\$599.7M

Total Cost for Childcare

Family Contributions

\$229.1M

Public Pre-K

\$78.3M

Pre-K 4 SA

\$54.8M

Head Start

\$84.5M

Early Head Start

\$30.7M

Child Care Services

\$122.5M

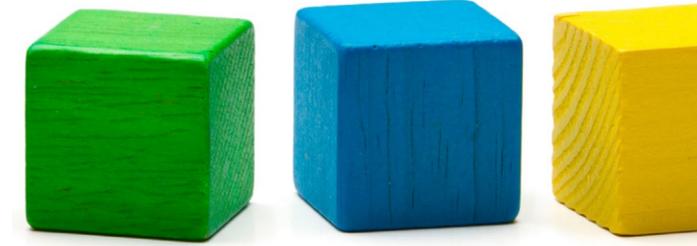


Access, Quality, and Sustainability

Looking ahead, the community will deepen its focus on stackable credentials

Workforce Development Efforts

The early education workforce pipeline faces ongoing challenges with compensation, professional pathways, and retention. In response, the early childhood community has advanced the workforce actions outlined in the Impact Plan.



The early childhood community has made meaningful progress across the Professional Pathways strategies, and priority actions have focused on better understanding early childhood workforce shortages, expanding access to professional development and shared learning systems, strengthening the training pipeline, and creating consistent opportunities to convene and support early childhood professionals. Looking ahead, the community will deepen its focus on stackable credentials by advancing articulation agreements and aligning education and training pathways, building on the foundation already in place to create clearer, more attainable career pathways for the workforce.

Strengthening Conditions for Providers

Strengthening conditions for providers requires coordinated effort across access, quality, and sustainability. In 2025, the early education community worked together to align support, reduce barriers, and expand opportunities for providers to grow and serve families.

Early Education Progress and Vision

Access

What Moved in 2025

- Leveraged the City of San Antonio Early Learning Landscape Report to guide strategies improving family access to early education and care.
- Partners launched targeted incentives and case management support, enabling providers to extend hours and serve military-connected families through MCCYN (Military Child Care in Your Neighborhood) scholarships.

What Comes Next

- Advance targeted strategies in identified child care deserts to address local gaps in capacity, quality, and access to subsidies.
- Continue Pre-K Enrollment Campaign to connect eligible families with free, high-quality learning options.
- Implement the new communitywide online search tool to help families identify high-quality early learning options.
- Launch with partners' provider-facing Texas Education Freedom Account (TEFA) resources to support participation and readiness.

Quality

- Partner-led quality improvement efforts increased high-quality early learning sites accessing CCS (Child Care Services) scholarships from 53% to 83% (TRS 3-4 Star or nationally accredited).
- Partners expanded Teachers for Tots, increasing access to CDA (Child Development Associate) credentials for infant and toddler teachers and providing targeted bonuses to strengthen retention.

- Launch a CLASS (Classroom Assessment Scoring System) Coaching Pilot to provide training, coaching, and assessment for teachers; support professional growth; and collect data to measure impact.
- Support the scaling of Shared Services Alliances to extend proven quality support to more providers.
- Implement inclusion coaching using a side-by-side model that supports educators in real time and deepens inclusion practices.

Sustainability

- Created and committed funding for a new position to support high-quality providers seeking to expand their businesses and serve more children.
- Developed and contracted for expanded inclusion conferences with dedicated director-level training to equip programs to better serve and support children with exceptional needs.

- Expand partner-led business coaching to help providers strengthen financial planning, navigate budgeting challenges, and build diverse revenue streams.
- Build shared resources to support provider participation in Texas Education Freedom Accounts (TEFA) and strengthen family awareness of early learning choices.
- Build on strong existing efforts and partner-led quality coaching to support more providers on their journey toward higher levels of quality.

Families and Engagement

Integrating the Family Perspective

Families are central to advancing the Impact Plan. Over the past year, the community shifted its approach to family engagement by gathering family perspectives through outreach and partner organizations and applying those insights to guide system-level action.

71,000 of approximately 132,000 children under age five are not accessing formal structured child care

The San Antonio Early Childhood Landscape Study* highlighted a significant access gap, with an estimated 71,000 of approximately 132,000 children under age five not accessing formal structured child care. For families who do access formal structured care, affordability, availability, practicality, and access to trusted information continue to shape decision-making.

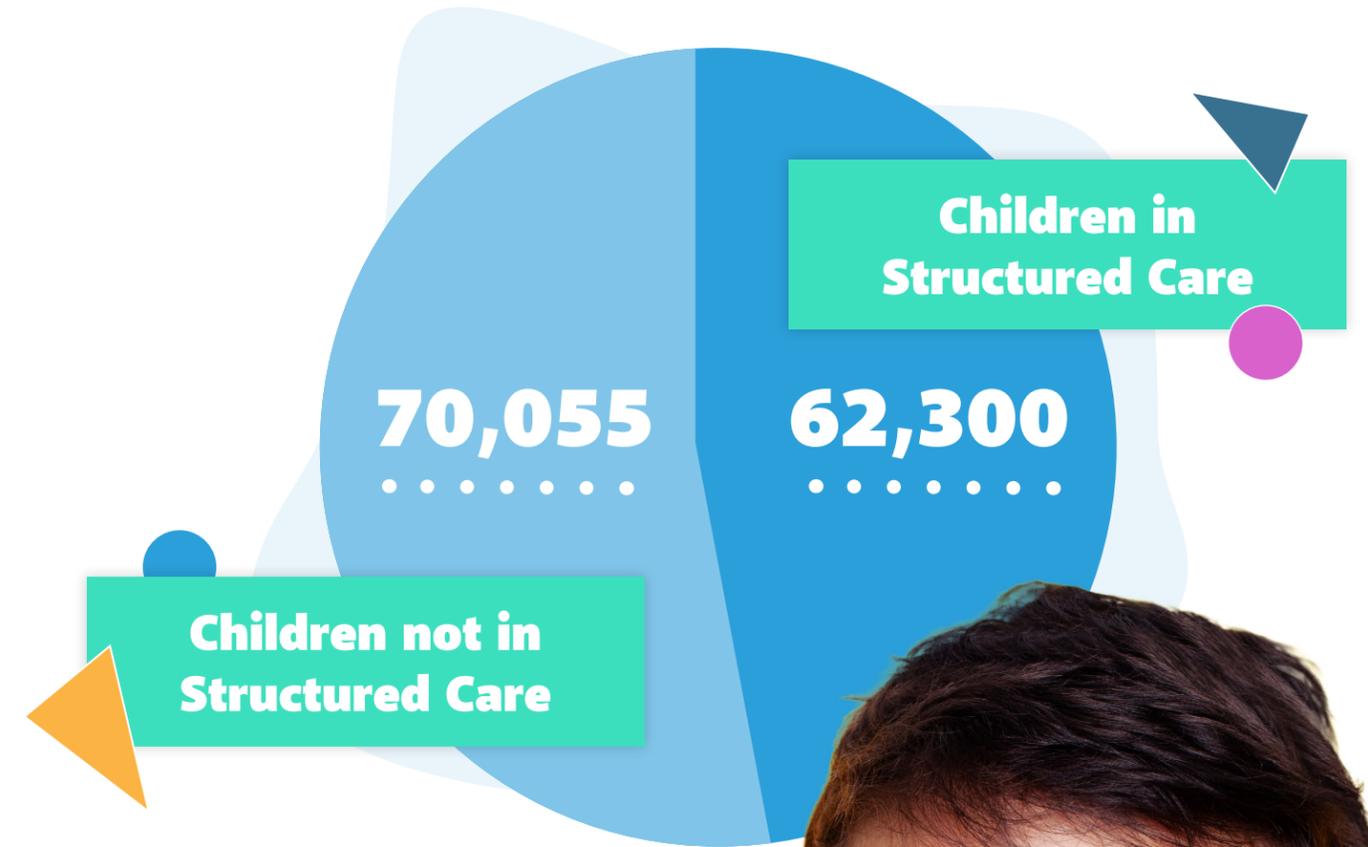
*Dr. Melissa Jozwiak (Texas A&M University - San Antonio) for the City of San Antonio in January 2025

Direct family engagement efforts, including the Westside Pilot, reinforced a core principle that families are the experts on their own lives

Families consistently emphasized the importance of trusted relationships, navigable systems, and resources grounded in real-world conditions. Their perspectives informed policy, partnerships, and implementation strategies, strengthening family engagement as an ongoing process that connects community experience to decision-making and ensures the Impact Plan serves all families across San Antonio.

Bexar County is Home to Over 132,355 Children Under the Age of Five

TAMUSA San Antonio Landscape Study, January 2025



Approximate numbers based on the total number of children, and available seats if operating at the findings of nearly 70%.

*Does not include Military Seats



Advocacy and Systems Change

Supporting Long-Term Progress

Advocacy efforts connected to the Impact Plan continue to focus on strengthening the conditions that support early childhood systems over the long term. This work reflects a shared understanding that policy and systems alignments are essential complements to programmatic efforts.

Through coordinated engagement, partners have supported policy discussions, business involvement, and shared data use that reinforce the goals of the Impact Plan. Advocacy is approached as a means of sustaining and scaling progress, informed by what the community is learning through implementation.



In 2025, with partners, several significant policy efforts were successful, many at the state level. These successes included multiple bills passed by the Texas Legislature and signed by the governor, marking meaningful progress toward strengthening early childhood systems statewide.

2025 Legislative Wins Impacting the San Antonio Community

Priority Area	Policy Win	What Changed?
Workforce Development	SB 462	Child care workers now receive priority access to child care scholarships for their own children.
System Sustainability	SB 599	The state now preempts local regulations for state-licensed and registered home-based child care providers.
Data & Accountability	HB 3963	Established improved cross-agency data sharing protocols for early childhood programs.
Early Elementary	HB 2	Allocated \$8.5 billion to public schools and established Pre-K Hubs for school/private provider partnerships.
Governance & Alignment	HB 4903	Created a Quad Agency Commission to reconcile conflicting regulations across four state agencies.

Priority Area	Policy Win	Why it Matters
Workforce Development	SB 462	This shored up child care capacity by allowing educators to stay in the workforce without waiting months for their own care.
System Sustainability	SB 599	This protects local "child care desert" solutions by removing burdensome, redundant, local red tape for home providers.
Data & Accountability	HB 3963	Empowered the community to make informed, evidence-based improvements while prioritizing ROI and safeguarding privacy.
Early Elementary	HB 2	Supports the community's "Bold Promise" by funding all day Pre-K for four-year-olds and adding early dyslexia screeners.
Governance & Alignment	HB 4903	Directly supports the Impact Plan's goal of building alignment across systems to allow collective work to move forward.

This past year marked a turning point to create a strong foundation for the work ahead. With improved systems-level support in place, the community can focus more directly on supporting families and educators, and strengthening the quality of care. This momentum keeps San Antonio moving toward a future where every child can succeed.

Early Matters San Antonio as a Collective

Supporting Collaboration and Learning

The Impact Plan is advanced by a diverse network of partners spanning early learning, health, workforce development, business, philanthropy, and government.

Together, the early education community brings varied expertise, lived experience, and local knowledge to the work, strengthening its ability to respond to complex challenges and advance shared priorities.

Workgroups provide a structured space for collaboration, learning, and coordination, and enable partners to explore challenges, test approaches, and share insights that inform ongoing work across the system.

Special thank you to the funders who are propelling this work forward.



Early Matters 2025 Wrap Up: By the Numbers

Number of Impact Plan Actions in Process



Number of Workgroup Members



Number of Workgroup Meetings



Total Funding Raised in 2025 for the Impact Plan



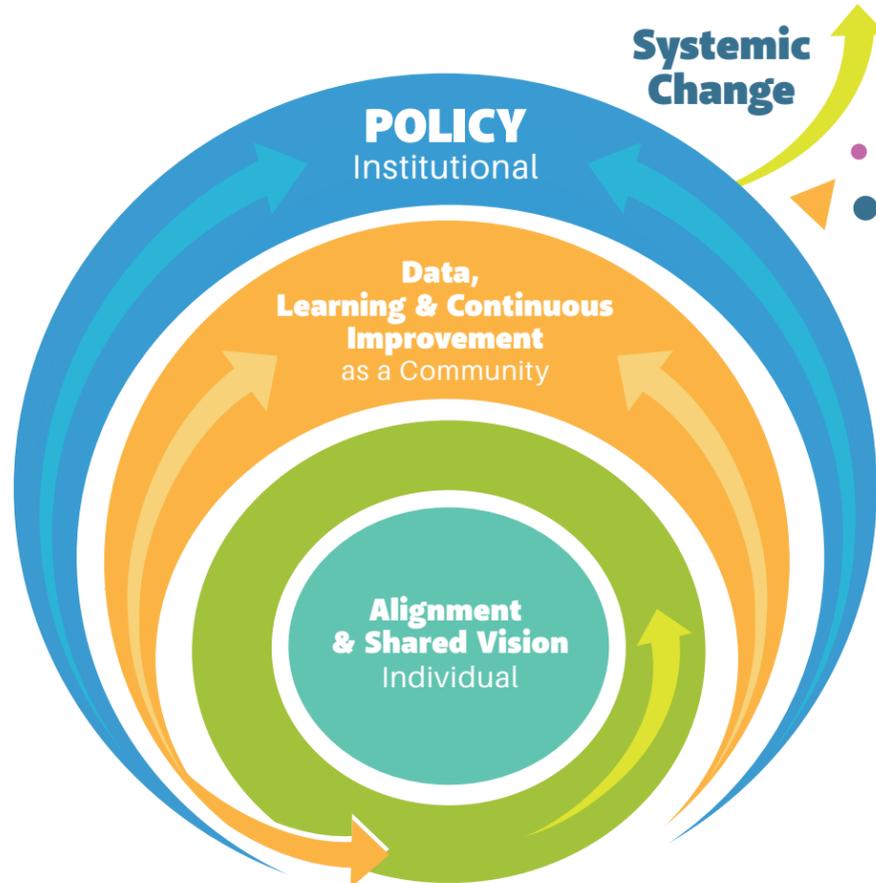
Number of Partner Organizations



Looking Ahead: Where We Are Going

As the Impact Plan moves forward, the early learning community and stakeholders will continue to focus on learning, alignment, and sustained progress. The coming year will build on existing strengths while responding to emerging needs and opportunities across the system.

Key priorities include:



This work reflects an ongoing commitment to collective action and continuous improvement. Together, the community will strengthen early childhood outcomes, support family economic mobility, and contribute to the region's long-term economic prosperity

The Role of Early Matters San Antonio

Providing Backbone Support

Early Matters San Antonio supports the Impact Plan implementation by providing backbone infrastructure for coordination, facilitation, and shared learning. Its role is to support the conditions that allow collective work to move forward effectively.

The Impact Plan was written by — and belongs to — the early childhood community. Progress reflected in this report is the result of shared effort, sustained engagement, and mutual accountability across partners.



Community Partners

Alamo Colleges District
 Alamo Quality Pathways
 Any Baby Can
 At the Heart of Teaching, Learning and Leadership
 Autism Community Network
 AVANCE - National
 AVANCE - San Antonio
 Bienestar - NEEMA Preschool Health Program
 Books and Bibs Childcare and Learning
 Brighton Center
 Children at Risk
 City of San Antonio - DHS
 City of San Antonio - EDD
 City of San Antonio - Head Start
 DePaul Wesley Children's Center
 Early Matters Texas
 Ecumenical Center
 Educare San Antonio
 ExcellED Montessori
 Family Service Association
 GDC Marketing & Ideation
 Good Samaritan Center
 Greater San Antonio Chamber of Commerce
 H-E-B Read 3
 Hancock Professional Development
 Health & Human Services - Child Care Regulations
 Healy Murphy Center
 HOLT Group
 Imagination Library San Antonio
 Kids R Kids
 KLRN
 Kronkosky Charitable Foundation
 Lantern Learning Group
 Life Church Learning Center
 Madison Square Child Development Center
 Madonna Center
 McKenna Foundation
 Methodist Healthcare Ministries of South Texas
 Michael's Childcare
 Morgan's Multi-Assistance Center
 New Braunfels Chamber of Commerce
 North East ISD
 Northside ISD
 Operation Child Care Project
 Pre-K 4 SA
 Ready to Work
 ReadyKidSA
 Region 20
 Respite Care of San Antonio
 Rise School - San Antonio
 SA Hope Center
 San Antonio College
 San Antonio ISD
 San Antonio Metro Health District
 San Antonio Workforce Development Office
 Spurs Sports & Entertainment
 St. Paul Child Development Center
 St. Philip's College
 TECPDS - Texas Early Childhood Professional Development System
 Texas A&M San Antonio
 Texas A&M San Antonio Institute for School and Community Partnerships
 Texas Education Agency
 Texas Licensed Child Care Association
 Texas School Ready
 Texas Workforce Commission
 The Children's Shelter
 TXAEYC - San Antonio
 UP Partnership
 United Way of San Antonio and Bexar County
 University of Texas at San Antonio
 University Presbyterian Church Children's Center
 Westside Community Center
 Will Smith Zoo School
 Workforce Solutions Alamo
 YMCA
 YWCA
 Yogiland Learning Center

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Laura Vaccaro
 CEO, Kronkosky Charitable Foundation

SYSTEM LEADERS

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 CEO, Pre-K 4 SA

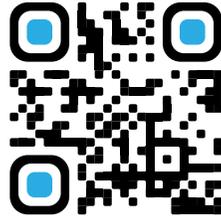
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Dr. Henrietta Muñoz
 CEO, Institute for School and Community Partnership at Texas A&M - San Antonio

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For the most up-to-date version of the Impact Plan with additional data measures, scan the QR or visit earlymatterssa.org/impactreport



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