



Brion Economics INC.

# Final Report

## San Mateo County Child Care Needs Assessment – 2022

*Prepared for*

San Mateo County Child Care Partnership Council,

San Mateo County Office of Education, and San Mateo County Superintendent of Schools



*Prepared by*

Brion Economics, Inc.

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- Sarah Kinahan, Project Manager, San Mateo County Child Care Partnership Council
- San Mateo County Office of Education
- Child Care Coordinating Council of San Mateo County (also known as 4Cs)

## Child Care Needs Assessment Ad Hoc Committee

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First 5 San Mateo County, Silicon Valley Community Foundation, California Department of Social Services, and San Mateo County Office of Education

# 1. Introduction and Summary of Findings

The Child Care Partnership Council, San Mateo County Office of Education (SMCOE), and San Mateo County Superintendent of Schools retained Brion Economics, Inc. (BEI) in 2022 to conduct a Countywide Child Care Needs Assessment, which will be used for a variety of purposes. BEI also conducted two surveys in collaboration with Seed Collaborative and SMCOE’s Center for Learning Analytics (CLA). The first is an assessment of the child care workforce or workers conducted by Seed Collaborative. The second survey is a survey of parents regarding their use and need for child care conducted by the CLA. The Parent Survey included questions about the current use of care and preferred use of care by age group. These survey results have been integrated into this child care supply and demand analysis. The survey provides specific data on the need for and use of child care specific to San Mateo County that was not available in the past.

BEI also prepared an analysis of child care workforce needs, pay, challenges, and education levels based on the results of the Workforce Survey and other data and studies reviewed for this effort. The Workforce Survey prepared for this effort by Seed Collaborative is published under a separate cover. The Center for Learning Analytics at the San Mateo County Office of Education prepared a countywide Parent Survey of child care needs, use, preference, challenges, and demographics. The results of the Parent Survey are integrated into the analysis, summarized in **Chapter 3**, and included in **Appendices F** through **H**.

BEI has worked with San Mateo County and with cities in the County on child care assessments several times in the past, including most recently in 2016/2017. Since 2020, the effects of COVID-19 have altered our lives, economy, schools, and of course child care, and the child care sector continues to contend with these effects in 2022. Overall, the child care industry has been impacted significantly by COVID-19. On a positive note, with the availability of new funding for child care at the State level, including funds for repair and maintenance, new facilities, and higher reimbursement rates, this is an exciting time to be preparing this Needs Assessment. Build Up San Mateo has been making excellent progress toward increasing the supply of child care spaces and facilities as well.

One of the main purposes of the Needs Assessment is to fulfill the State’s requirement for each county to analyze the child care needs for Infants, Preschoolers, and School Age children as of 2022. This assessment includes what is called a Child Care Supply and Demand Study, which estimates the demand for child care by age group and compares it to the available supply of child care spaces by type, age, and location. This study presents the analysis at the San Mateo County level as well as the city and community levels (see **Chapter 2** and **Appendix A**). The Study also includes a projection of growth in total population and number of children over the next 10 years, to 2032 (see **Chapter 2** and

**Appendix B).** The State required needs assessment also includes data and information on a variety of factors that are related to the provision of child care and the well-being of children and families (see **Chapter 3**). Data and analysis of the child care workforce in San Mateo County are provided in **Chapter 4**. Other relevant surveys, data, and information related to children’s learning from The Big Lift evaluations, Transitional Kindergarten (TK) planning, and other information is provided in **Chapter 5**. This Study includes nine appendices (**Appendices A through I**) with detailed analysis, data, results, or background information.

## Chapter 2: Child Care Supply and Demand Findings

- **Total Children:** As of 2022, there are an estimated 805,000 people in San Mateo County, of which 109,600 are children ages 0 to 12 years old, or 13.6% of the total population. Currently, there are approximately 18,100 Infants or children under 2 years old, 27,600 Preschool age children, ages 2 to 4 years old, and 63,800 School Age children, ages 5 to 12 years old.

San Mateo County	2022	2032	Net Change	Net Change
<b>Total Population</b>	<b>804,739</b>	<b>863,164</b>	<b>58,424</b>	<b>7.3%</b>
Total Employees	405,687	428,285	22,598	5.6%
Children Under 2 Years Old	18,127	17,899	-229	-1.3%
Children 2 to 4 Years Old	27,596	27,394	-201	-0.7%
Children 5 to 12 Years Old	63,843	63,833	-10	0.0%
<b>Total Children 0 to 12 Years Old</b>	<b>109,566</b>	<b>109,126</b>	<b>-440</b>	<b>-0.4%</b>
Children 0 to 12 as % of Total Population	13.6%	12.6%	-1.0%	

*Note 40% of 4-year-olds are included in School Age, or 5 to 12 Year Olds at 2032, for TK reasons.*

- **Population Growth 2022 to 2032:** Overall, San Mateo County will see an increase in total population of about 58,400 residents, or 7.3% between 2022 and 2032, for a total population of about 863,000 in 2032. For children 0 to 12 years old, there will be a slight decrease of 440 children in the number of total children countywide. This trend is consistent with other demographic trends, including lower birth rates, women delaying having children, and migration out of the County.<sup>1</sup> Children as a percent of the total population are expected to be about 1% less by 2032, or 12.6%.<sup>2</sup>
- **Employment Growth 2022 to 2032:** Employment growth will remain strong. The County is a major employment hub for the Bay Area with a total of about 406,000 jobs as of 2022. The County is expected to add about 22,600 jobs by 2032, or a 5.6% increase over current

<sup>1</sup> As described in the CA DOF Methodology link here: <https://dof.ca.gov/forecasting/demographics/projections/>

<sup>2</sup> “California’s New Baby Bust,” by the Public Policy Institute of California. June 4, 2021. <https://www.ppic.org/blog/californias-new-baby-bust/>

conditions. About 40% of these jobs are filled by people commuting into the County and these commuters generate a small amount of demand for child care services. Nearly 41% of countywide jobs are held by non-county residents. A small percentage (3%) of these employees also demand child care.

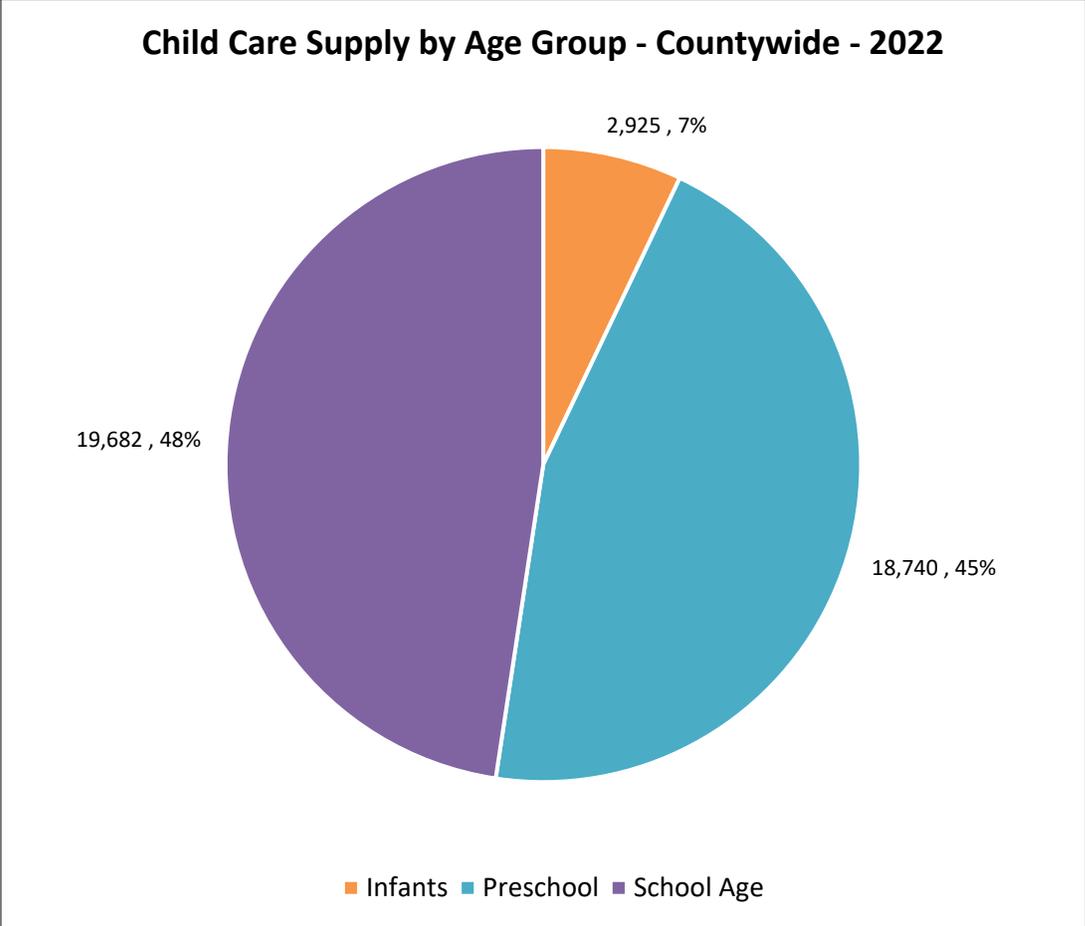
Employment at 2022 and 2032			
Year	Total Employment	Non-Resident Employment	Non-Resident Jobs as % of Total Jobs
County - 2022	405,687	164,340	40.5%
County - 2032	428,285	174,040	40.6%
Net Change	22,598	9,699	42.9%
% Change	5.6%	5.9%	

- **Total Demand for Child Care in 2022:** The total demand for licensed child care spaces as of 2022 equals about 58,500 spaces. The breakdown of demand is 15% Infants, 34% Preschool, and 51% School Age. Overall, 92% of demand is from residents and 8% is from non-resident employees.

San Mateo County Demand for Child Care Spaces - 2022				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	Percent Distribution
Infants	6,743	1,972	8,715	15%
Preschool	16,889	2,958	19,847	34%
School Age	29,942	-	29,942	51%
<b>Total Demand</b>	<b>53,574</b>	<b>4,930</b>	<b>58,505</b>	<b>100%</b>
% of Demand	92%	8%	100%	

- **Child Care Supply in 2022:** There are approximately 41,350 child care spaces in San Mateo County for children from 0 to 12 years old. Of these, about 5,800 (14%) are associated with Family Child Care Homes (FCCHs), and 86%, or about 35,600 are associated with child care centers, including licensed and license-exempt providers. By age group, 7% of FCCHs and center spaces combined are serving Infants, 45% provide care to Preschool Age children, and 48% provide care to School Age children. **Exhibit S-1** summarizes the existing supply by age group.

**Exhibit S-1**

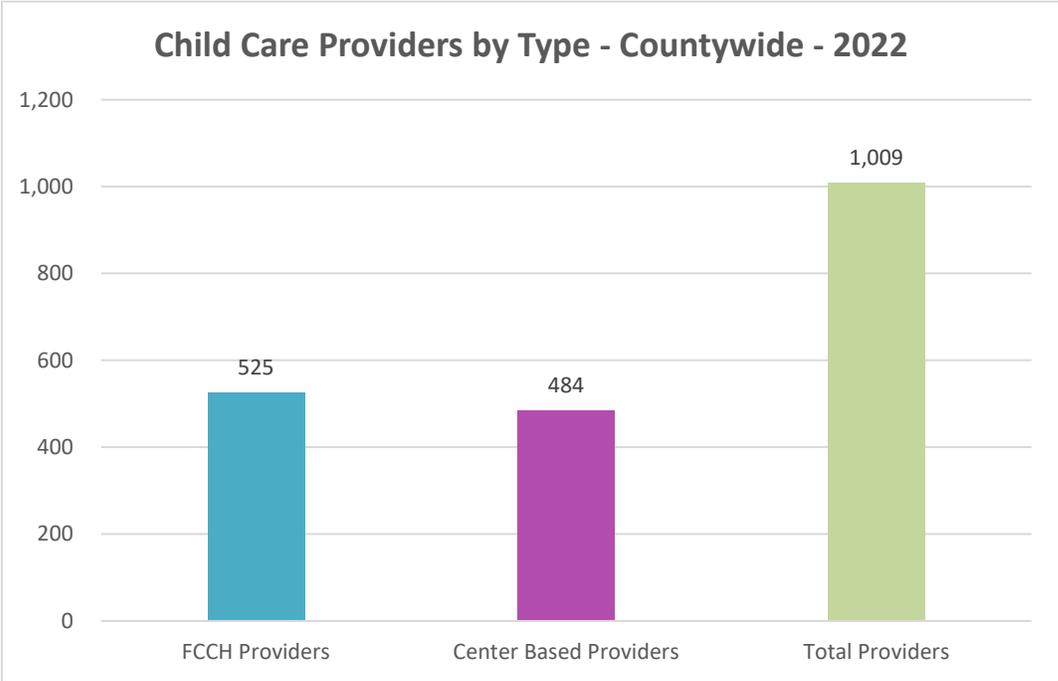


San Mateo County Supply of Child Care Spaces - 2022				
Age of Children	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	1,334	1,591	2,925	7%
Preschool	2,669	16,071	18,740	45%
School Age	1,763	17,919	19,682	48%
<b>Total Supply</b>	<b>5,766</b>	<b>35,581</b>	<b>41,347</b>	<b>100%</b>
% of Supply	14%	86%	100%	

- Total Child Care Providers:** In 2022, there are 1,009 total child care providers Countywide. **Exhibit S-2** summarizes the existing supply of child care providers by type.
- Child Care Supply in 2032:** By 2031, there are approximately 42,409 child care spaces in San Mateo County for children from 0 to 12 years old. Of these, about 5,796 (14%) are associated with Family Child Care Homes (FCCHs), and 86%, or about 36,613 are associated with child care centers, including licensed and license-exempt providers. By age group, 7% of FCCHs and center

spaces combined are serving Infants, 46% provide care to Preschool Age children, and 46% provide care to School Age children. Overall, a 3% increase in supply is expected.

**Exhibit S-2:**



2032 Supply in San Mateo County					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net	% Change
Infants	1,349	1,813	3,162	7%	237	8%
Preschool	2,684	16,881	19,565	46%	825	4%
School Age	1,763	17,919	19,682	46%	-	0%
<b>Total Supply</b>	<b>5,796</b>	<b>36,613</b>	<b>42,409</b>	<b>100%</b>	<b>1,062</b>	<b>3%</b>
% of Supply	14%	86%	100%			

- Change in Supply Since 2017:** In 2017, there were a total of 39,528 child care spaces countywide with 67% of demand being met.<sup>3</sup> While there has been an overall net increase of 1,819 child care spaces, there has been a significant loss of Infant and Preschool Age spaces, as shown below. The net loss of Infants and Preschool has been masked by the substantial increase in School Age spaces. In total, there has been a loss of 885 Infant spaces in the last 5 years, a reduction of 23% in the supply of Infant Care. Preschool Age lost 489 spaces, a loss of 3% since 2017. The number of School Age spaces has increased by 3,193, or 19%. There has

<sup>3</sup> 2017 San Mateo County Child Care and Preschool Needs Assessment, prepared by Sarah Kinahan Consulting. November 2017.

been a loss of 163 providers since 2017, a 14% reduction in the number of providers countywide.

2017 to 2022 Change in Supply of All Spaces - San Mateo County				
Age of Children	All Spaces 2017	All Spaces 2022	Net Change	% Change
Under 2 Years Old	3,810	2,925	(885)	-23%
2 to 4 Years Old	19,229	18,740	(489)	-3%
5 to 12 Years Old	16,489	19,682	3,193	19%
<b>Total Supply</b>	<b>39,528</b>	<b>41,347</b>	<b>1,819</b>	<b>5%</b>
No. of Providers	1,172	1,009	(163)	-14%

- Change in FCCHs since 2017:** In 2017, there were 6,663 FCCH spaces in the County and that figure has declined by 897 spaces, or 13%, as of 2022. There has been a loss of 101 FCCH providers or 16%. There are now 525 FCCHs in the County. This loss is likely associated with the impacts of the COVID-19 Pandemic, which started in early 2020. It should be noted that not all FCCHs are in operation; they may have closed temporarily and are holding onto their license.

2017 to 2022 Change in Supply of FCCHs - San Mateo County				
Age of Children	FCCH Spaces 2017	FCCH Spaces 2022	Net Change	% Change
Under 2 Years Old	2,332	1,334	(998)	-43%
2 to 4 Years Old	2,932	2,669	(263)	-9%
5 to 12 Years Old	1,399	1,763	364	26%
<b>Total Supply</b>	<b>6,663</b>	<b>5,766</b>	<b>(897)</b>	<b>-13%</b>
No. of Providers	626	525	(101)	-16%

- Change in Center-Based Care since 2017:** Since 2017, there has been a net increase of child care spaces in center-based care, due to an increase in School Age spaces of 8% over the last 5 years. There was an increase in 113 Infant Care spaces since 2017. Overall, there has been an increase of about 2,716 center-based spaces in the County. There was a loss of 62 center-based providers from 2017 to 2022 or an 11% reduction in providers over the last 5 years. Again, this loss of providers is likely associated with the COVID-19 Pandemic.

2017 to 2022 Change in Supply of Center-Based Spaces - San Mateo County				
Age of Children	Center Spaces 2017	Center Spaces 2022	Net Change	% Change
Under 2 Years Old	1,478	1,591	113	8%
2 to 4 Years Old	16,297	16,071	(226)	-1%
5 to 12 Years Old	15,090	17,919	2,829	19%
<b>Total Supply</b>	<b>32,865</b>	<b>35,581</b>	<b>2,716</b>	<b>8%</b>
No. of Providers	546	484	(62)	-11%

- Total Child Care Shortage – 2022:** Overall, there is a shortage of about 17,200 spaces for all age groups in the County, or, 29% of children needing a child care space do not have one. That is,

currently 71% of the demand for child care for all ages is being met. This is higher than many counties in the state but still a significant shortfall, given the cost of developing new child care spaces and the size of the shortfall in available spaces. It is important to note that spaces in one age group cannot serve other age groups, but this measure is an important overall indicator of whether needs are being met (see **Table S-1**).

Estimated Surplus or Shortage by Year - San Mateo County				
Age Group	Shortage of Spaces - 2022	% of Demand Met - 2022	Shortage of Spaces - 2032	% of Demand Met - 2032
Infants	(5,790)	34%	(5,191)	38%
Preschool	(1,107)	94%	(250)	99%
School Age	(10,260)	66%	(16,487)	54%
<b>Total Surplus/(Shortage)</b>	<b>(17,157)</b>	<b>71%</b>	<b>(21,928)</b>	<b>66%</b>

- **Infant Care Shortage – 2022:** In San Mateo County, there is currently a shortage of about 5,800 Infant (under 2 years old) spaces with 34% of demand currently met. The shortage varies significantly by City/Area.<sup>4</sup>
- **Preschool Shortage– 2022:** For Preschool Age children (2-, 3-, and 4-year-olds), there is a shortage of about 1,100 spaces, with 94% of demand being met.<sup>5</sup> The shortage varies by City/Area.
- **School Age Shortage– 2022:** For School Age children (5 to 12 years old), there is a shortage of 10,300 spaces in San Mateo County. Approximately 66% of total demand is met with existing supply.<sup>6</sup>
- **Future Demand for Child Care in 2032:** The analysis includes the results of the Parent Survey regarding their preference for child care, assuming price and location are not a barrier. The changes in demand factors include 35% of Infants or a slight decrease over current use (37.2%), 68.8% for Preschool, a slight increase over current use (61.2%), and 54% for School Age, an increase of 7% over current use or demand analyzed for 2022. These demand factors are integrated into the 2032 analysis including demographic shifts and increases in the supply of child care spaces.

<sup>4</sup> Infants include children from birth through and up to 2 years old.

<sup>5</sup> Demand for, or shortage of, spaces refers to licensed or license-exempt spaces.

<sup>6</sup> Ibid.

Countywide Demand 2032					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	6,265	2,088	8,353	13%	(362)	-4%
Preschool	16,683	3,133	19,815	31%	(31)	-0.2%
School Age	36,169	-	36,169	56%	6,227	21%
<b>Total Demand</b>	<b>59,116</b>	<b>5,221</b>	<b>64,337</b>	<b>100%</b>	<b>5,833</b>	<b>10%</b>
% of Demand	92%	8%	100%			

- Future Infant Demand in 2032:** By 2032, demand for licensed Infant spaces will decrease slightly to about 8,353, by about 362 spaces, or a 4% decrease in demand. This analysis assumes a small increase in the number of licensed or license-exempt Infant spaces between 2022 and 2032, or 237 more planned Infant care spaces in the County are expected to be operating by 2032. These spaces are associated with Build Up San Mateo projects and pending licenses for new providers.
- Future Preschool Demand in 2032:** There will be demand for 20,100 Preschool spaces, an increase in demand of about 1% or 258 Preschool spaces. This is due to an increase in the demand factor based on the Parent Survey. The supply of Preschool spaces is planned to increase by 825 spaces. These spaces are associated with Build Up San Mateo projects and pending licenses for new providers.
- Future School Age Demand in 2032:** For School Age spaces, there will be an estimated increase in demand by 2032 or by 6,200 spaces associated with the shift of 40% of 4-year-olds into the School Age category associated with TK. This change represents a 21% increase in the shortage of School Age spaces by 2032. Currently, the CCPC and Build Up SMC are not aware of or tracking any planned new School Age centers spaces or providers known, although the County has added a lot of new School Age spaces over the last 5 years.
- Future Supply of Child Care Spaces in 2032:** By 2032, the total supply of child care spaces is expected to be 42,409, including 27 new planned projects with 1,062 Infant and Preschool Age spaces. This represents a 3% increase in supply. There will likely be other new child care projects, so this is a conservative estimate of future supply.

2032 Supply in San Mateo County					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net	% Change
Infants	1,349	1,813	3,162	7%	237	8%
Preschool	2,684	16,881	19,565	46%	825	4%
School Age	1,763	17,919	19,682	46%	-	0%
<b>Total Supply</b>	<b>5,796</b>	<b>36,613</b>	<b>42,409</b>	<b>100%</b>	<b>1,062</b>	<b>3%</b>
% of Supply	14%	86%	100%			

- Overall Future Change in Demand in 2032:** By 2032, there will be an overall increase in the countywide demand for child care spaces of about 6,100. Overall, 66% of demand is expected to be met by 2032 as compared with 71% in 2022, assuming no additional supply is added, beyond the already planned increases discussed above. The shortfall will increase from 17,000 spaces to 21,900 spaces. It should be noted that spaces by age group are not interchangeable and the shortages by age group are the key focus of any child care Needs Assessment. In addition, supply in one part of the County may not service children in other parts of the County. Hence the shortages in each City/Area are of key interest and are analyzed in detail in this Study (see **Appendices A and B**). The estimated 21,900 spaces needed by 2032 is an increase in unmet demand of about 4,800 spaces overall, across all age groups.
- Change in Infant Care by 2032:** The shortage of Infant care spaces is expected to decrease slightly by 2032, from about 5,800 to 5,200 spaces. Unmet demand increases slightly from 34% in 2022 to 38% in 2032 due to a slight decrease in the demand factor for Infant care discussed above. That is, the projected supply meets a slightly higher percentage of needs by 2032.
- Change in Preschool Care by 2032:** The shortage of Preschool spaces will decrease by 2032 to 250 spaces. This is a relatively balanced result given the size of the Preschool demand countywide. Currently, 94% of demand is met and it will increase to 99% by 2032, or basically, be in balance. This suggests that decades of local and state-level work toward universal preschool is bearing results and adding new Preschool spaces in the County may not be a priority by 2032.
- Change in School Age Care by 2032:** Overall, the demand for and shortage of School Age care will increase significantly by 2032. This is due to the preference of parents to secure after- and before-care for their children from the Parent Survey, changing demographics, the implementation of TK expansion, and no known new supply planned by 2032. The current shortfall is about 10,300 spaces, and this shortfall is projected to increase to 16,500 spaces by 2032. The percentage of demand met goes from 66% in 2022 to 54% by 2032 where only half of children needing a School Age child care space will have a child care space available, without significant changes in supply.

**Table S-1** present an overall summary of the supply and demand by age group and total findings for 2022 and 2032 from the analysis.

**Table S-1**  
**Summary of Countywide Supply and Demand of Child Care, and Unmet Need**  
**San Mateo County Child Care Needs Assessment - 2022**

Item	Infant, Under 2 Years	Total Preschool, 2- 4 Years	School Age, 5-12 Years	Total, 0-12 Years
<b>DEMAND AND SUPPLY - 2022</b>				
Total Child Care Demand	8,715	19,847	29,942	58,505
Percent Distribution	15%	34%	51%	100%
Total Supply of Spaces	2,925	18,740	19,682	41,347
Percent Distribution	7%	45%	48%	100%
Surplus (Shortfall)	<b>(5,790)</b>	<b>(1,107)</b>	<b>(10,260)</b>	<b>(17,157)</b>
Percent Distribution	34%	6%	60%	100%
Percent of Demand Met	34%	94%	66%	71%
<b>DEMAND AND SUPPLY - 2032</b>				
Total Child Care Demand	8,353	19,815	36,169	64,337
Percent Distribution	13%	31%	56%	100%
Total Supply of Spaces	3,162	19,565	19,682	42,409
Percent Distribution	7%	46%	46%	100%
Surplus (Shortfall)	<b>(5,191)</b>	<b>(250)</b>	<b>(16,487)</b>	<b>(21,928)</b>
Percent Distribution	24%	1%	75%	100%
Percent of Demand Met	38%	99%	54%	66%
<b>NET CHANGE 2022 TO 2032</b>				
Change in Child Care Demand (1)	<b>(362)</b>	<b>(31)</b>	6,227	5,833
Change in Supply of Spaces	237	825	0	1,062
Net Change in Surplus/(Shortfall)	<b>599</b>	<b>856</b>	<b>(6,227)</b>	<b>(4,771)</b>
Percent Change Surplus/(Shortfall)	-10%	-77%	61%	28%

(1) Slight decrease in infant demand; preschool demand decreased partly due to the shift in 4-year-olds to TK; increase in school age due to additional 4-year-olds.

Source: Brion Economics, Inc.

**Exhibits S-3 and S-4** present a high-level summary of the study results and give a broad understanding of the need in the County and the projected change. How to meet these needs or shortages needs to be addressed at the local level. The County has a key role to play in increasing the supply of child care in all communities and cities in the County. The State is also an important player in the provision of child care by creating the conditions needed for providers to flourish, through policy changes and funding, including increasing reimbursement rates, funding facility expansion, and setting higher wages

for ECE workers. These issues are discussed further in **Chapter 4** of this study. The existing increase in School Age spaces is a key example of how concerted efforts can change the child care landscape.

**Exhibit S-3**

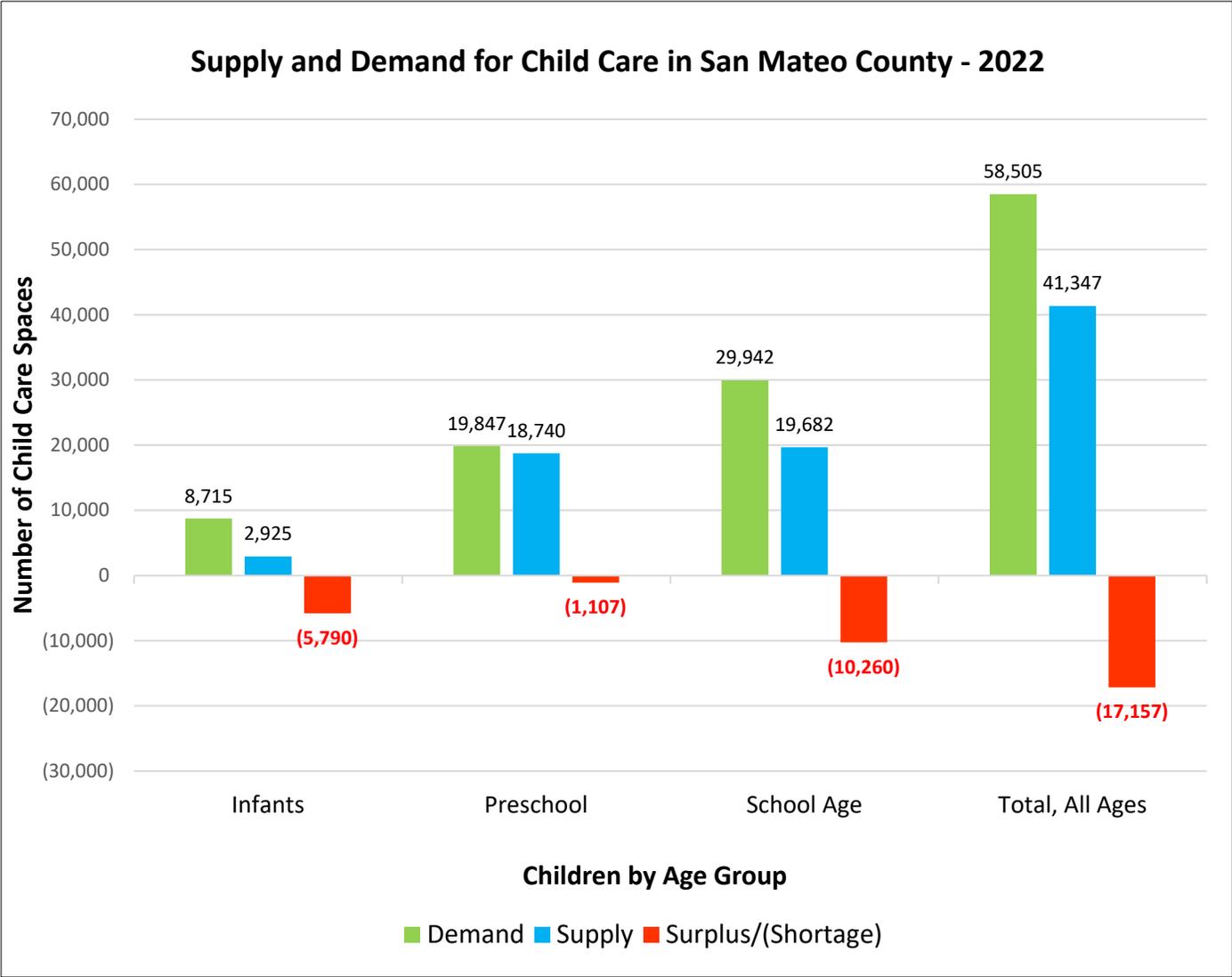
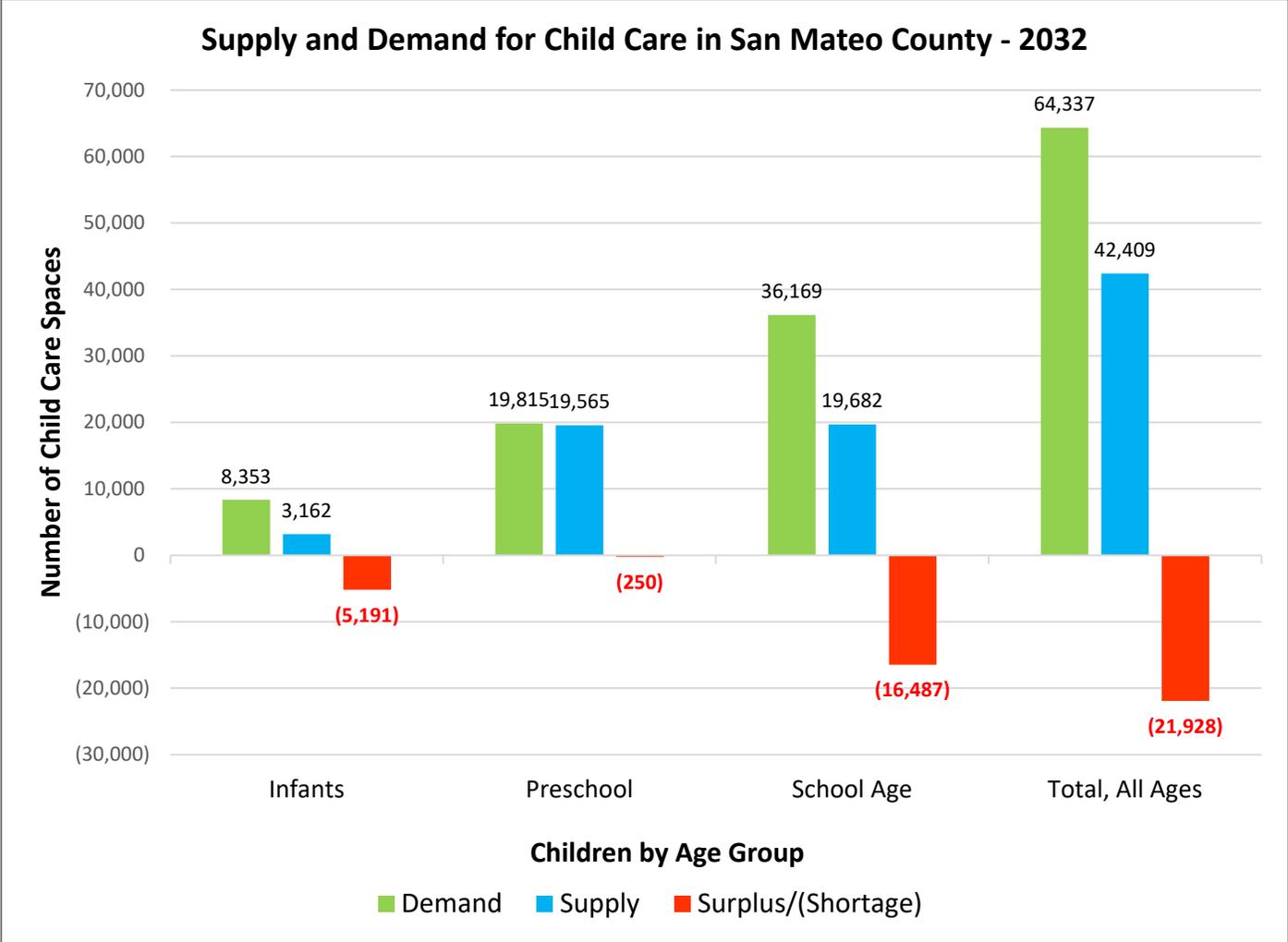


Exhibit S-4



### Chapter 3: Needs Assessment Findings

This section presents high-level findings from **Chapter 3: State-Mandated Needs Assessment Requirement**.<sup>7</sup> The California Department of Social Services prescribes the data elements to be included in the child care needs assessment and has provided a template for reporting the data (see **Appendix C**). These data are reported for the County as a whole unless otherwise stated. The timeframe of the data varies by topic; all data used is the most recent and available publicly.

<sup>7</sup> Note: local data on population and supply of child care spaces and providers is summarized in Chapter 2.

- **Ethnicity of Children:** The ethnic distribution of children 0 to 12 years old in the County is: Hispanic/Latino at 33%, White at 31%, Asian American/Pacific Islanders at 17%, Multi-racial, at 9%, Filipino at 7%, and all other ethnicities at 3% of the total.
- **Cost of Child Care:** As of 2022, the maximum reimbursement rate for center-based full-time child care ranges from \$1,180 to \$2,168 per month, depending on the age group served. For FCCHs, the rate ranges from \$1,350 to \$1,459 per month. These rates pertain to those providing subsidized care. Average market rates of center-based care range from \$972 to \$2,042, and for FCCHs \$1,003 to \$1,561, based on 2020-2021 data. Part-time rates are generally less.
- **Subsidized Child Care Spaces:** About 7,000 children received subsidized child care in the County, ages 0 to 12 years old, which represents 17% of the total estimated supply of child care spaces. About 14% of total Infant spaces are subsidized, 15% of Preschool Age spaces are subsidized, and 19% of School Age spaces are currently subsidized. In contrast, about 33,000 or 30% of children ages 0 to 12 years old may be eligible for a subsidized space. These spaces include the following subsidized programs: California State Preschool (CSPP) and California General Child Care (CCTR), Early Head Start, Head Start, SMCOE's The Big Lift, CalWORKs Stages 2 and 3, and Alternative Payment programs.
- **Children Determined to Be Eligible and Waiting for Alternative Payment (AP) Vouchers:** There are a total of 2,103 children ages 0 to 12 waiting for AP vouchers, according to data from the 4Cs. There is no centralized waitlist data in the County, although some providers do keep waitlists.
- **Language Spoken by Kindergarten Children:** Of Kindergarten children who speak a primary language other than English, Spanish makes up the greatest percentage (65.5%) and Cantonese and Mandarin make up 5.5% and 6.4%, respectively. Children speaking other non-English languages speak a total of 38 other languages.
- **Children with Special Education Needs:** Currently, there are 671 children under 3 years old with an IFSP, and 506 children 3 to 5 years old with IEPs, for a total of 1,177 children 0 to 5 years old.
- **Children in Protective Services:** As of 2021, there are 144 children 0 to 21 in Foster Care in the County, down by 33% from 2020, although data is not reported for all age groups due to the small counts for some age groups. From April 2021 to March 2022, there were 4,610 reports of maltreatment of children ages 0-17.

- **Children with Working Parents:** Of the total 109,566 children 0 to 12 years old, there are about 81,000 that have working parents. Labor Force Participation Rates are 71.2% for children under age six, and over age six is 75.4%; however, these rates vary greatly throughout the County.
- **Public Assistance:** About 10% of the population under age 18 received some form of public assistance in the last 12 months. In 2020, CalFresh provided food support for about 11,200 children 0-17 years old. Currently, 9.2 per 1,000 children 0 to 17 years old are in families participating in CalWORKs, which is significantly lower than in years past.
- **Family Income and Children:** The median household income for a family of four in the County is \$181,400. About 8%, or 9,100, of children 0 to 12 live in households making less than the federal poverty level (FPL) of \$27,750. This is a decrease from the 2017 needs assessment, when 11,016 children ages 0 to 12 were estimated to live in households making less than the FPL. About 28,300, or 26% of children 0 to 12 years old live in households making 85% or less than the State Median Income. There are wide disparities in income between different types of households in the County by size, ethnicity, presence of children, and gender.
- **Migrant Children:** Currently, there are a total of 260 children ages 0 to 12 years old in the Migrant Education Program in the County.
- **Child Care Facilities:** Build Up San Mateo, a countywide effort to increase the supply of child care spaces in the County has a goal of adding 3,000 new spaces for Infants and Preschool age children over the next few years. Currently, there are about 2,300 known spaces in projects planned and under development in the County, or 76% of their goal. There are likely more child care planning projects in the works as well.
- **Non-Traditional Hours and Requests for Care:** According to data from 4Cs, total requests for care have gone down recently to 1,461 in 2021-2022. There were 186 requests for non-traditional hours of care including evening, overnight, weekends, rotating, and drop-in care in 2021-2022. This is about 27% higher since 2019-2020. Employment reasons are the most cited reason for requests.
- **Quality Counts California:** Currently, 93 sites participate in Quality Counts San Mateo (QCSM). This represents 9.2% of the total 1,009 child care providers in San Mateo County. Approximately 250 ECE staff each year receive stipend support for completing higher education units or professional development.

- **Parent Needs and Concerns:** As part of the Needs Assessment, a countywide parent survey was conducted in the fall of 2022. **One of the most striking results is that 73% of respondents stated that they have turned down work due to a lack of child care.** The survey provides important new data on the current use of care by age group and the preferred use of child care by parents. These data have been integrated into the supply and demand analysis of **Chapter 2**. Highlights of the survey results include:
  - About 37% of parents use licensed Infant care, 61% use licensed Preschool care, and 47% use licensed and license-exempt School Age care.
  - About 35% of parents desire licensed Infant care, 69% desire licensed Preschool care, and 54% desire licensed and license-exempt School Age care.
  - About 70% of respondents said they use child care for work outside the home, and another 14% for work inside the home, for a total of about 84%.
  - About 80% use child care near their home or their child’s school.
  - Affordability of child care was the highest consideration for families; 65% of respondents indicated that affordable child care was somewhat or very hard to find.
  - More detailed results from the survey are available in **Appendices F** through **H**.
- **Access to Child Care:** The coastal towns and communities of San Mateo County have less access to child care than other urban areas of the County or those along the Highway 101 corridor. Build Up San Mateo is supporting three projects on the coast including 1) Half Moon Bay – an 18-space Infant project, 2) Pescadero – a 12-space Infant project, and 3) Pacifica – a 40-space Infant and Preschool project.
- **Family Self-Sufficiency:** Given the high costs of housing and child care in the County, many families find it hard to afford child care and struggle to meet basic needs. The self-sufficiency household income for one adult with two children is about \$173,000 while the median income for a female-led household with children is about \$60,000, or 34% of what is required. Child care costs average 25% or more of needed household income.
- **Emergency Preparedness:** In March of 2020, the SMC COVID-19 Child Care Response Team was formed to manage communications (in multiple languages and formats), informational/technical workshops for parents and child care providers (including an online Re-opening Forum), fundraising, and advocacy. The team consisted of partners from various sectors of the community who functioned as liaisons with key local and state organizations/agencies. The team identified three key areas of focus: Establishment of emergency child care for essential workers; Economic relief for child care providers, particularly

home-based and other private child care providers; and, Emergency child care supplies. About \$4.5M in federal CARES dollars were received which provided emergency grants of up to \$55,000 for child care centers and \$10,000 to family child care homes (FCCHs). Another \$835,000 in private contributions was raised. A total of 100% of center-based grantees and 94% of FCCHs were able to remain in business with these grants.

- **2021 Provider COVID-19 Survey:** In March 2021, 161 providers responded to a County survey about the impacts they were experiencing from COVID-19. In 2021, 91% of respondents had some or all classrooms open, compared to 58% in 2020. Approximately 14% of the workforce’s employment was impacted by COVID-19 and 68 programs reported that they reduced staff pay. Overall, 64 providers, or 45% of respondents said they had one month or less of savings on hand and 47% had incurred debt due to COVID-19. Child care businesses desire support in the areas of financial assistance, subsidies for staff pandemic bonuses, funding for overhead expenses, advertising, and client referrals.
- **Homelessness in San Mateo County:** In 2019,<sup>8</sup> the number of people experiencing homelessness in SMC totaled 1,512 and comprised 901 people who are unsheltered (living in the streets, cars, recreational vehicles (RVs), and tent/encampments) and 611 people living in emergency homeless shelters or transitional housing. No unsheltered families were observed in the 2019 count and the number of unsheltered families is estimated at 16, which has decreased from the 2017 count when 19 families were estimated to be unsheltered. The overall findings show that people experiencing homelessness on the count day in 2019 increased by 21% from 2017 to 2019, but this decreased from 2011 and 2013; the increase was primarily due to an increase in people living in RVs. The count found an overall decrease in families with children experiencing homelessness, people sleeping in cars, and people in tents/encampments.

## Chapter 4: Child Care Workforce Findings

- **Lack of Staff:** Recently, half of the community-based subsidized preschools in the County reported needing more than 100 new Preschool teachers, and a lack of staff limits their capacity to serve children in state Preschool programs, a problem that will only worsen with the implementation of Universal Pre-Kindergarten or Transitional Kindergarten (TK).
- **Current Workforce Estimate:** Overall, the total child care workforce estimate is 5,331 workers based on current teacher: child ratio requirements. This represents 1.3% of the County’s total employment base or the number of jobs in the County in 2022.

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<sup>8</sup> Most recent survey data available.

- **Current Shortfall Workforce Needs – 2022:** Based on the estimated shortfall of 17,157 child care spaces, another 2,829 ECE workers are needed to address current shortages. This includes aides, teachers, and directors or owners of FCCHs.
- **Current Child Care Worker Wages:** Current average wages range from \$20 per hour for aides and support staff to \$31 per hour for directors, based on the Workforce Survey results. These wage rates are significantly below current living wage requirements for San Mateo County.
- **Living Wages:** The base living wage for San Mateo County is about \$53 per hour. Current wages need to increase from 168% to 263% depending on the occupation level of ECE workers. After adjusting for education and experience, the average hourly wage of a child care worker needs to be earning \$53 to \$77 per hour to be making a living wage.
- **Annual Costs of Living Wage:** Current child care workforce wages are estimated at \$253 million per year based on current wages. To bring needed ECE workers up to a living wage (addressing the wage gap) would cost an additional \$422 million per year. The total living wages for ECE workers is estimated at \$676 million per year.
- **Living Wages of Staff Shortfall:** The living wage cost of meeting the current staff shortfall of 2,829 ECE workers in the County is \$352.2 million.
- **Living Wage Salaries:** The average living wage annual salary for a child care worker is \$131,600, while the current average salary overall is \$49,000, ranging from a low of \$41,000 to a high of \$63,000 per year, depending on the type of position, for full-time work.
- **State Reimbursement Rates:** Current reimbursement rates are significantly below what it costs to run child care programs based on living wage needs and other business expenses.
- **True Cost of Care:** Adjusting for living wages and other appropriate expenses for providers, the annual true cost of care per child is \$16,200 for School Age, \$27,700 for Preschool, and \$42,800 for Infants, for center-based care. For small FCCHs, the annual true cost of care per child is \$27,400 for School Age, and \$54,800 for Preschool and Infant care. For large FCCHs, the annual true cost of care per child is \$23,000 for School Age and \$44,500 for Preschool and Infant care. Actual reimbursement rates are much lower, covering only 57% to 73% of care costs. Center-based School Age care is the only category where reimbursement rates mirror the actual true cost of care. For FCCHs the reimbursement rates are from 33% to 72% of the true cost of care. Reimbursement rates for Title 5 care are higher at 54% to 85% of the true cost of care. Only for School Age care in child care centers is the reimbursement rate equal to the actual true cost of care.

- **Professional Development Options:** ECE professionals are served by three in-County institutions of higher education (IHEs): Skyline College in San Bruno (North County), the College of San Mateo (Central County), and Cañada College in Redwood City (South County). ECE professionals pursuing Bachelor, Master, or Doctorate degrees must access higher education in neighboring counties or online.
- **Barriers to Education:** Many barriers exist to increasing education levels in the child care workforce, including language, location of programs, technical challenges, age of the workforce, and low pay, which acts as a disincentive to acquiring higher education. Cost alone is not the only barrier. An estimated 65% of ECE workers would qualify for financial aid.
- **State Permit Trends:** According to Commission on Teachers Credentialing (CTC ) data through June 30, 2021,<sup>9</sup> the rate of child development permit applications and upgrades fell during the COVID-19 pandemic (in both 2019-2020 and 2020-2021) across California and especially in San Mateo County. During 2019-2020, only 32 child development permits in total were issued, and during 2020-2021 only 46 were issued in San Mateo County. In contrast, in 2009-2010, 308 permits were issued in the County.
- **Educational Needs:** In order to address improved quality, obtaining higher education levels for current ECE workers is an overall goal in the County. An estimated 328 teachers who work in child care centers with children ages 0 to 5 years old do not have an AA/AS or BA/BS degree in ECE or a similar field.<sup>10</sup>
- **Incremental Education Costs:** The cost of bringing the center-based child care 0 to 5 workforce to a BA/BS level is about \$6.86 million, or \$20,900 per student, assuming they receive an AA/AS and transfer to a 4-year college or university. After potential financial aid is applied, the net cost is estimated at \$2.4 million or about \$7,300 per student. This average cost represents a significant cost given the low wages of most ECE workers.
- **Nanny Survey:** The Institute for Families and Nannies (TIFFAN) completed a survey of 121 working nannies in San Mateo County in Spring 2022. About 46% of respondents have worked 11 years or more and 92% have worked 6 years or more as a nanny. About 79% were foreign-born (with 70% of these nannies speaking Spanish as their primary language); 35% had college degrees and 65% had less than a 2-year degree in educational attainment. Support is needed

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<sup>9</sup> [https://www.childdevelopment.org/docs/default-source/permit-documents/1996-2021-history-of-permits.pdf?sfvrsn=77749238\\_2](https://www.childdevelopment.org/docs/default-source/permit-documents/1996-2021-history-of-permits.pdf?sfvrsn=77749238_2)

<sup>10</sup> FCCH staff and School Age teachers have different credential requirements than Preschool teachers and are not included in these estimates.

for nannies' interest in job training, education, certification, and mentoring; respondents requested bilingual programs with mentoring and technical support offered during the evenings and on weekends, using content unique to nannyng.

- **Economic Multiplier Effect:** The child care industry generates additional economic benefits in San Mateo County. For every \$1 spent in the industry, \$1.88 is generated in the County. The current wages of ECE workers generate \$476 million annually in economic activity. If ECE workers received a living wage, the industry would generate \$894 million per year.

## Chapter 5: School Readiness and Universal Pre-Kindergarten Findings

- **Kindergarten Readiness and The Big Lift:** About 75% percent of third grade students from disadvantaged families are not reading at grade level. The Big Lift is addressing these challenges and works in seven local school districts. As expected, children with Preschool experience enter kindergarten more developmentally prepared for school, though readiness rates still vary significantly based on socioeconomic status. Across varying types of Preschool experiences (Big Lift and non-Big Lift), there remains a 49-percentage point difference in readiness rates between children who attend Preschool and whose families are middle-to-high income and children who attend Preschool whose families are very low-income.
- **Transitional Kindergarten (TK):** Beginning in FY 22-23, California is expanding age eligibility for TK so that by FY 25-26 all four-year-olds will be eligible for TK in their school district. TK is optional and voluntary – parents can choose to keep their child at home or enroll them in Preschool, Head Start, or other child care. This analysis assumes that 40% of 4-year-olds will be in TK by 2032, reducing the need for Preschool child care spaces across the County, and increasing the need for School Age spaces, specifically for those children whose parents need full-time care. In 2020, TK served an estimated 772 4-year-olds, or about 10% of 4-year-olds countywide. The shift to TK will create additional demand for TK teachers and assistant teachers. The impact of TK on the operations of community-based preschools is a pressing concern to providers, as 4-year-olds provide the main financial base of their operations.
- **Impacts of Universal Preschool (UPK):** Research shows that children placed in UPK are more likely to graduate high school, less likely to be placed in special education programs, and less likely to repeat a grade. This can lead to a 13% return on investment year-over-year for those that implement UPK. Some cities report a loss of Infant and Toddler spaces, as providers race to provide UPK, which is more economically beneficial, due to higher teacher-to-student ratios. Higher teacher pay in public programs often draws skilled educators out of the private sector, leaving these private programs short-staffed and with no budget to offer incentives to encourage them to stay.

## 2. Child Care Supply and Demand Analysis – 2022 and 2032

This chapter presents the methodology, analysis, and results of the Child Care Needs Assessment’s Supply and Demand Analysis for current conditions (2022) and future conditions (2032) for children from 0 to 12 years old by City/Area in San Mateo County. It includes summary data for each city or community area in the County. The community area called the Half Moon Bay region includes the City of Half Moon Bay and the communities of El Granada, Montara, and Moss Beach. The South Coast community area includes La Honda, Loma Mar, Pescadero, and San Gregorio. The zip codes for these cities and communities are grouped into the 20 cities/areas used in this analysis. Unincorporated areas of the County are included in nearby cities, based on ABAG’s defined Spheres of Influence.

A summary of the child care supply and demand analysis findings is in **Chapter 1**. Please note that the **Chapter 2** Summary Tables by City/Area of the supply and demand analysis tables are at the end of the Chapter. **Appendices A and B** provide detailed supply and demand tables for each City/Area in the County, and countywide totals.

### Background and Methodology

In California, there are several methodologies for estimating demand for child care, but there is limited published data on this issue. Given the diversity of demographics in the State by county, the use of a single set of child care demand factors across the state does not make sense. BEI followed the *LPC Child Care Needs Assessment: Instruction Guide for Completing the Aggregate County Report* using suggested data sources, except where more current data or additional data were available.<sup>11</sup>

The 2022 Needs Assessment begins with the underlying demographic data and then growth projections are incorporated into the analysis. Child care supply and demand analysis by City/Area and for the County is then estimated for 2022 and 2032. This study focuses on children ages 0 to 12 years old, with the following age ranges:

- Infants – children under 2 years old
- Preschool – children ages 2, 3, and 4 years old
- School Age – children ages 5 to 12 years old

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<sup>11</sup> See California Child Care Coordinators Association’s “LPC Child Care Need Assessment: Instruction Guide for Completing the Aggregate County Report.” <http://www.california-childcare-coordinators.org/resources/resources-lpc-coordinators.html>.

The Parent Survey developed for this Needs Assessment surveyed 1,160 parents on a variety of child care issues and needs, including their current use of child care by age group, and preferred use of child care by age group assuming price and location were not an issue. The results of this survey regarding demand factors for child care are used in this study. The summary of results by age group is shown below. The preferences for licensed child care by age group vary slightly from current usage. For 2022 conditions, the current use factors are used. For 2032 future conditions, the preferred use factors are used in the analysis. This assumes that the County makes progress toward increasing the supply of child care and that child care becomes more affordable.

Age Group	2022 Demand	2032 Demand	Difference
Infants - Under 2 Years	37.2%	35.0%	-2.2%
Preschool, 2-4 Years	61.2%	68.8%	7.7%
School Age, 5 or older	46.9%	54.0%	7.2%

### Current Conditions – 2022

- Infants – 37.2% of total children need licensed child care
- Preschool – 61.2% of total children need licensed child care
- School Age – 46.9% of total children need licensed child care

This methodology does not include the use of Labor Force Participation Rates (LFPR) by age, which is a typical method used to estimate demand for licensed child care. Instead, it uses the Parent Survey results on use and preference which are similar to LFPRs, controlling for parents who work or not; the majority of respondents use child care for work reasons as discussed in **Chapter 3**.

### Future Conditions – 2032

- Infants – 35% of total children need licensed child care
- Preschool – 68.8% of total children need licensed child care
- School Age – 54% of total children need licensed child care

This chapter presents summary results of the child care supply and demand analysis countywide and by City/Area. **Appendix A** presents detailed Needs Assessment tables and the supporting data for each City/Area individually for Existing Conditions in 2022. **Appendix B** presents the same tables for Future Conditions in 2032.

This study uses some zip code-level data for the analysis of supply and demand. The correspondence of zip codes to City/Area analyzed in the Study is shown in **Exhibit 2-1**.

**Exhibit 2-1: Zip Code Correspondence Chart**

ZIP Code	City/Area Name	Proposed Cities/Community Areas
94002	Belmont	1. Atherton
94005	Brisbane	2. Belmont
94010	Burlingame/Hillsborough	3. Brisbane
94014	Daly City/Colma	4. Burlingame
94015	Daly City	5. Daly City/Colma
94019	Half Moon Bay/El Granada	6. East Palo Alto
94020	La Honda	7. Foster City
94021	Loma Mar	8. Half Moon Bay Region (1)
94025	Menlo Park	9. Hillsborough
94027	Atherton	10. Menlo Park
94028	Portola Valley	11. Millbrae
94030	Millbrae	12. Pacifica
94037	Montara	13. Portola Valley
94038	Moss Beach	14. Redwood City
94044	Pacifica	15. San Bruno
94060	Pescadero	16. San Carlos
94061	Redwood City/Woodside	17. San Mateo
94062	Redwood City/Woodside	18. South Coast (2)
94063	Redwood City	19. South San Francisco
94065	Redwood City	20. Woodside
94066	San Bruno	
94070	San Carlos	(1) Includes, Half Moon Bay, Montara, and Moss Beach.
94074	San Gregorio	(2) Includes La Honda, Loma Mar, and Pescadero
94080	South San Francisco	and San Gregorio.
94303	East Palo Alto	
94401	San Mateo	
94402	San Mateo	
94403	San Mateo	
94404	Foster City	

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Note: Excludes UPSP facility zip codes

## Demand and Supply of Child Care

The Needs Assessment is focused on the 20 incorporated cities or community areas listed in **Exhibit 2-1** above. This study uses population and age data from the Association of Bay Area Governments (ABAG) *Projections 2040* as the main source for demographic data. The data is used to analyze existing conditions in 2022 and to forecast conditions in 2032. ABAG provides consistent data for both 2022 and 2023 and includes estimates of children by age group. In addition, ABAG projections provide an

estimate of total employment or jobs by City/Area, which is used to estimate demand from employees that commute into the County for work. The use of ABAG data provides one data source that is internally consistent.<sup>12</sup>

As shown in **Table 2-1**, the total population for San Mateo County in 2022 is estimated at 804,739, based on calculating the average annual growth between 2020 and 2022 from *ABAG Projections 2040*, which was just released in October 2021. **Table 2-2** shows population growth by City/Area between 2022 and 2032. The County’s population is expected to grow from 804,739 to 863,164, an increase of about 58,000, or 7.3%. About 80% of this growth will occur in the largest cities in the County, including Redwood City, Menlo Park, Millbrae, San Mateo, San Bruno, and South San Francisco. The City of San Mateo is expected to see the largest increase in population with about 13,500 new residents followed by Redwood City with about 10,600 new residents. The specific increases for each City/Area are shown in **Table 2-2**, along with the percentage change.

## Age Groupings

**Table 2-3** calculates the 2022 estimated population by age group for children birth to 12 years old. Children are grouped as Infants - under 2 years old, Preschool - 2 to 4 years old, and School Age - 5 to 12 years old. Population by age group is estimated for each City/Area, and by total countywide. The distribution of children for Infants and 2-, 3-, and 4-year-olds is based on 2018 AIR data by age, for the category, “under 5 years old”, by zip code.<sup>13</sup> The data for School Age children are based on ABAG data for 5 to 12-year-olds. The 2022 population data is estimated extrapolations between 2020 and 2025. Currently, there are a total of 109,566 children, ages 0 to 12 years old countywide as of 2022. Infants make up 16.5%, Preschool age children make up 25.2%, and School Age children make up the remaining 58.3% of all children 0 to 12. **Table 2-3** summarizes children by age group and by City/Area. Children 12 and under as a percent of the total population for each City/Area and the County overall is provided in the last column.

The second part of **Table 2-3** summarizes the estimates of children by City/Area and age group for 2032, based on *ABAG Projections 2040*, and using the same methodology described above for existing conditions. Overall, there is almost no change between 2022 and 2032 for children ages 0 to 12. Children 0 to 12 as a percent of the total population is projected to go down by 1% by 2032, to 12.6% of the total population. Changes by City/Area and age group vary as shown in the third part of **Table 2-3**. Most Cities/Areas have a net loss of children across all age groups, except for Menlo Park, Millbrae, Redwood City, and South San Francisco. East Palo Alto shows a very slight increase in School Age

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<sup>12</sup> *Projections 2040* does not include jurisdictional data with each city’s sphere of influence as it has previously. Therefore, current data for 2022 and 2032 has been adjusted and the unincorporated area’s data (which is a total of many small and large unincorporated pockets in the County) is redistributed based on the definitions from prior ABAG projections.

<sup>13</sup> ABAG only publishes data for children 0 to 4 years old as a group.

children over the 10-year period. The greatest change is the decrease in the number of Infants. A net decrease of 229 Infants is forecast, a reduction of 1.3% overall from 2022. There is a decrease of 201 Preschool age children by 2032, or 0.7%. There is almost no change in School Age children with a decrease of 10 children countywide.

## Employment

**Table 2-4** summarizes current (2022) and future (2032) employment estimates by City/Area in San Mateo County. In 2022, there are an estimated 405,700 jobs in the County. By 2032, this figure will increase by 5.6% to 428,300. Employment growth varies by City/Area as shown. **Table 2-4** summarizes Journey-to-Work data from the U.S. Census for 2022 and their projections for 2032.<sup>14</sup> This shows the number of jobs that are held by individuals commuting into the County from elsewhere. This study assumes that 3% of employees commuting from outside of the County will require one child care space in the County. The demand for these spaces is a small portion of the overall demand for care and is divided between Infant and Preschool Age care. Overall, commuters into the County make up 40% of employees in the County. This is likely due to two factors: the major concentration of high-tech jobs and the high cost of housing, which makes it difficult for many workers to find affordable housing close to their workplace.

## Child Care Demand

The demand factors used in this study are calculated based on the results of the Parent Survey that was conducted for this Needs Assessment, as discussed above. For current conditions, the analysis uses the average current use of licensed care, and for future conditions, the preferred use of licensed care, as reported by parents.

These demand factors for licensed care are applied to the total number of children by City/Area and Countywide. For Infants, a demand factor of 37.2% is applied to total Infant children under 2 years old. For Preschool children, the licensed care demand factor is 61.2% of total children ages 2 to 4 years old. The demand factor for School Age children is 46.9% of total children ages 5 to 12 years old. In 2032, the analysis assumes that 40% of 4-year-olds are going to go to TK and they are included in the School Age category; the remaining 60% are included in Preschool. This reduces the overall shortage of Preschool spaces in the County in 2032 and increases the need for School Age spaces.

The total demand for licensed child care spaces by age group for 2022 is summarized in **Table 2-5** and shown graphically in **Exhibit 2-2** (including demand from residents and non-resident employees). Overall, demand countywide totals 58,505 spaces. The demand for Infant spaces equals 8,715 spaces,

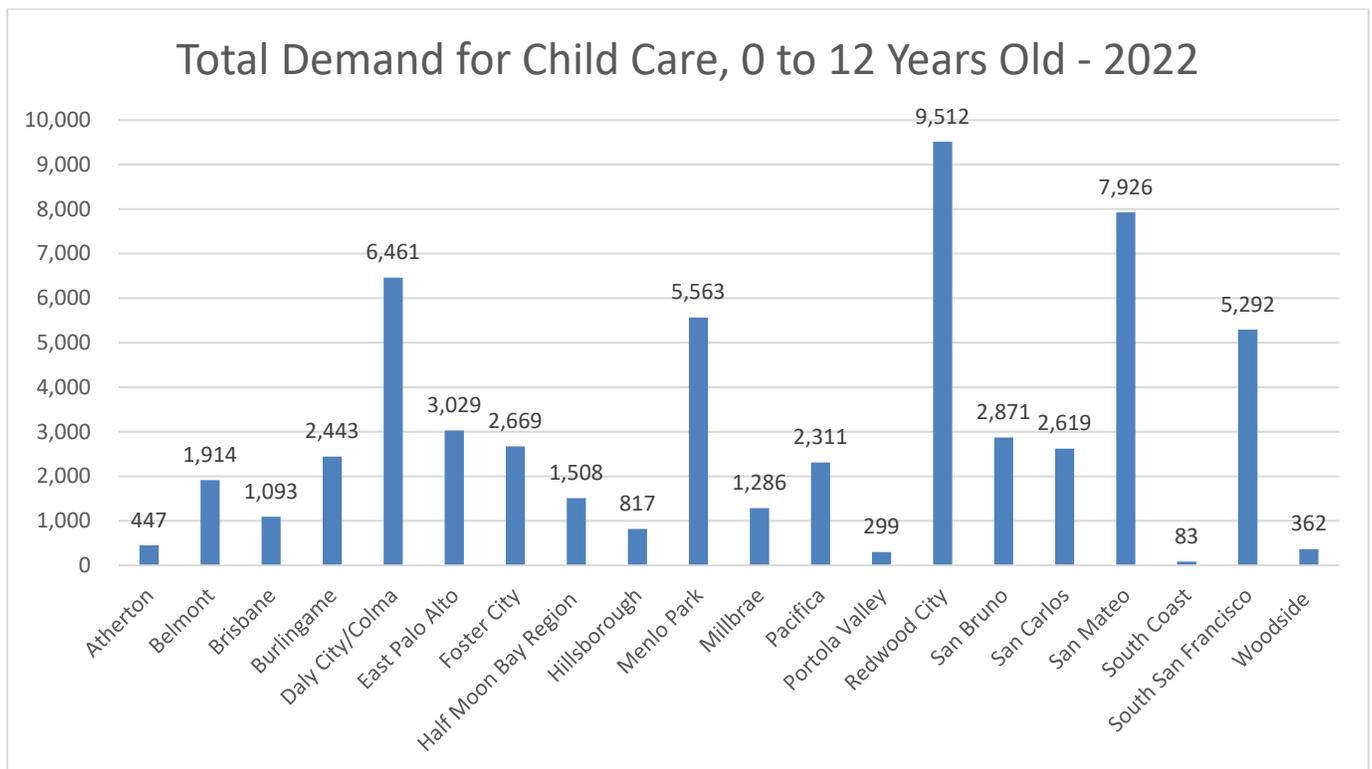
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<sup>14</sup> These data are from American Community Survey (ACS) for 2019, which is the latest year of data available. These rates are applied to ABAG's estimate of jobs for 2022 and 2032.

Preschool demand is 19,847 spaces, and School Age demand is 29,942 spaces. Redwood City has the highest demand, followed by San Mateo and Daly City/Colma. Menlo Park and South San Francisco also comprise a large part of the overall demand, given the larger populations in all of these cities.

**Table 2-5a** summarizes the demand by age group and City/Area in 2032, and shows the net change from 2022, along with the distribution of demand in 2032 by City/Area. This includes both resident and non-resident demand. In 2032 it is predicted that there will be a need for 8,353 Infant spaces, 20,105 Preschool spaces, and 36,169 School Age spaces, for a total demand of 64,627 licensed child care spaces countywide. This is an increase of 6,122 spaces or a 10% increase in demand from 2022 to 2032. More details on demand for each City/Area can be found in **Appendix A** for existing 2022 conditions and **Appendix B** for future conditions in 2032.

**Exhibit 2-2**



Child Care Supply

**Table 2-6** summarizes the number of providers by type, or FCCHs and Centers, by location. As shown, there are a total of 525 FCCH providers in the County and 484 licensed and license-exempt centers, for a total of 1,009 providers. Countywide, there has been a loss of about 163 providers since 2017, as shown in the chart below. It should be noted that not all FCCHs are in operation; they may have closed

temporarily and are holding onto their license. This analysis focused on licensed family child care homes and licensed and license-exempt center-based providers.

2017 to 2022 Change in Supply of All Spaces - San Mateo County				
Age of Children	All Spaces 2017	All Spaces 2022	Net Change	% Change
Under 2 Years Old	3,810	2,925	(885)	-23%
2 to 4 Years Old	19,229	18,740	(489)	-3%
5 to 12 Years Old	16,489	19,682	3,193	19%
<b>Total Supply</b>	<b>39,528</b>	<b>41,347</b>	<b>1,819</b>	<b>5%</b>
No. of Providers	1,172	1,009	(163)	-14%

**Table 2-7** summarizes current licensed and legally license-exempt<sup>15</sup> child care supply by age group for Infants, Preschool, and School Age children by City/Area as of Spring 2022, based on information provided by the 4Cs, Community Care Licensing, and the CCPC. **Exhibits 2-3 and 2-4** show the supply of child care spaces by type by City/Area. **Appendix D** provides definitions of the types of child care providers and terms used in this analysis. The child care supply does not include family, friends, neighbors, or nannies for this analysis as these types of care are not licensed.

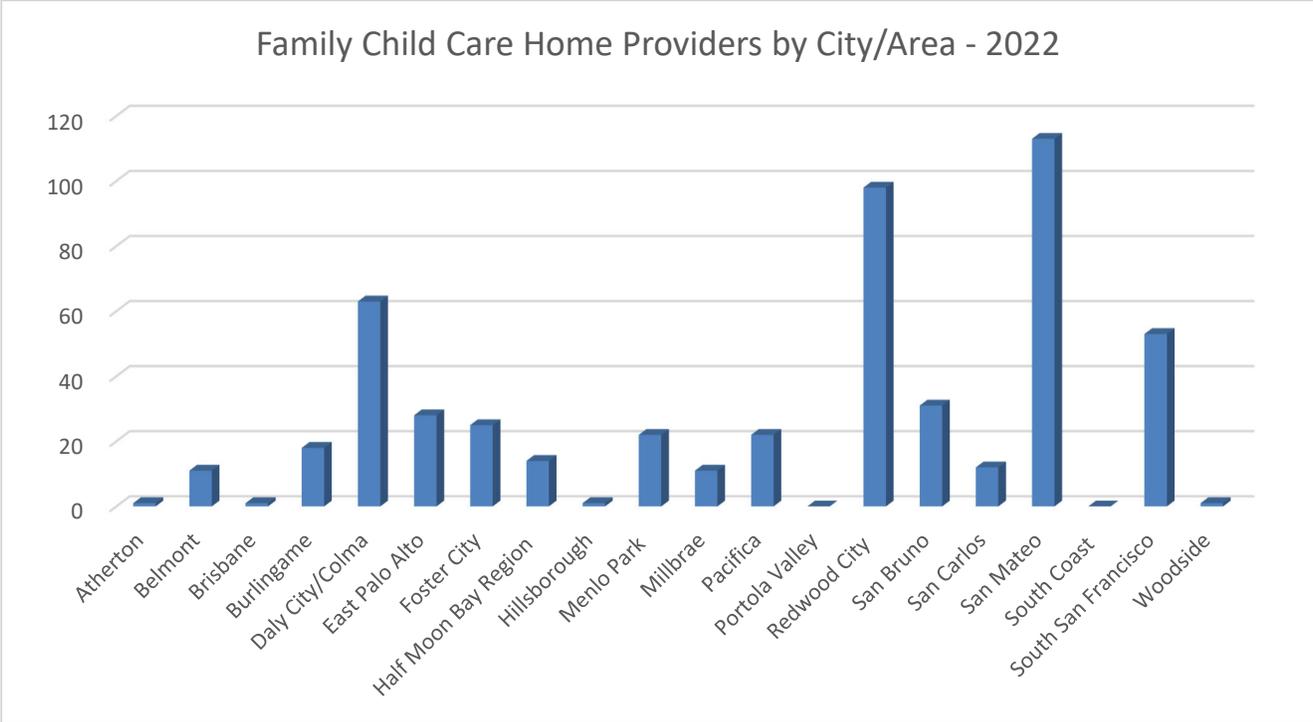
The Cities/Areas of Daly City/Colma, Redwood City, and San Mateo have the greatest number of providers in the County, at 10.2%, 17.1%, and 19.4%, respectively. These three areas have 472 providers, almost half of the total providers in the County. While there are more FCCHs than Centers, by definition, they serve fewer children overall. The distribution of FCCH providers by City/Area is shown graphically in **Exhibit 2-3**.

The distribution of Center-based child care providers by City/Area is shown below in **Exhibit 2-4**. Consistent with the distribution of FCCH providers discussed above, the larger cities in the County have the highest concentration of center-based child care providers, although the percent distribution varies based on whether there is a predominance of FCCHs, Centers, or both.

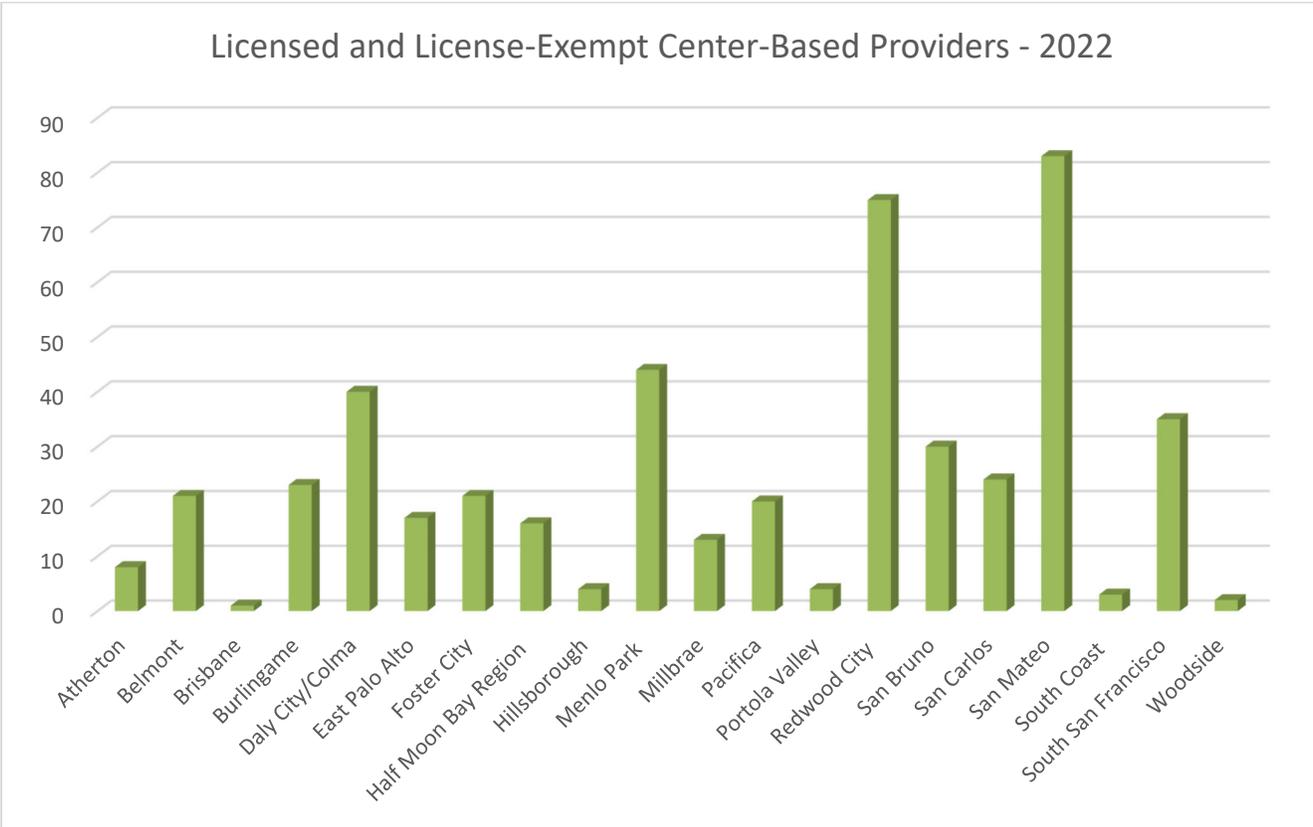
**Table 2-7** summarizes the total supply of child care spaces by age group and City/Area as of 2022. There are currently a total of 41,347 child care spaces in the County. This includes 2,925 Infant spaces, 18,740 Preschool spaces, and 19,682 School Age spaces. Infant care only accounts for 7% of all spaces, while Preschool spaces make up 45% of the supply, and School Age spaces make up 48% of the total supply. **Exhibit 2-5** summarizes the total number of child care spaces by City/Area as of 2022.

<sup>15</sup> Legally license-exempt programs include programs run by city park and recreation programs, co-operative/parent participation programs, school district programs, and federal migrant programs.

**Exhibit 2-3**



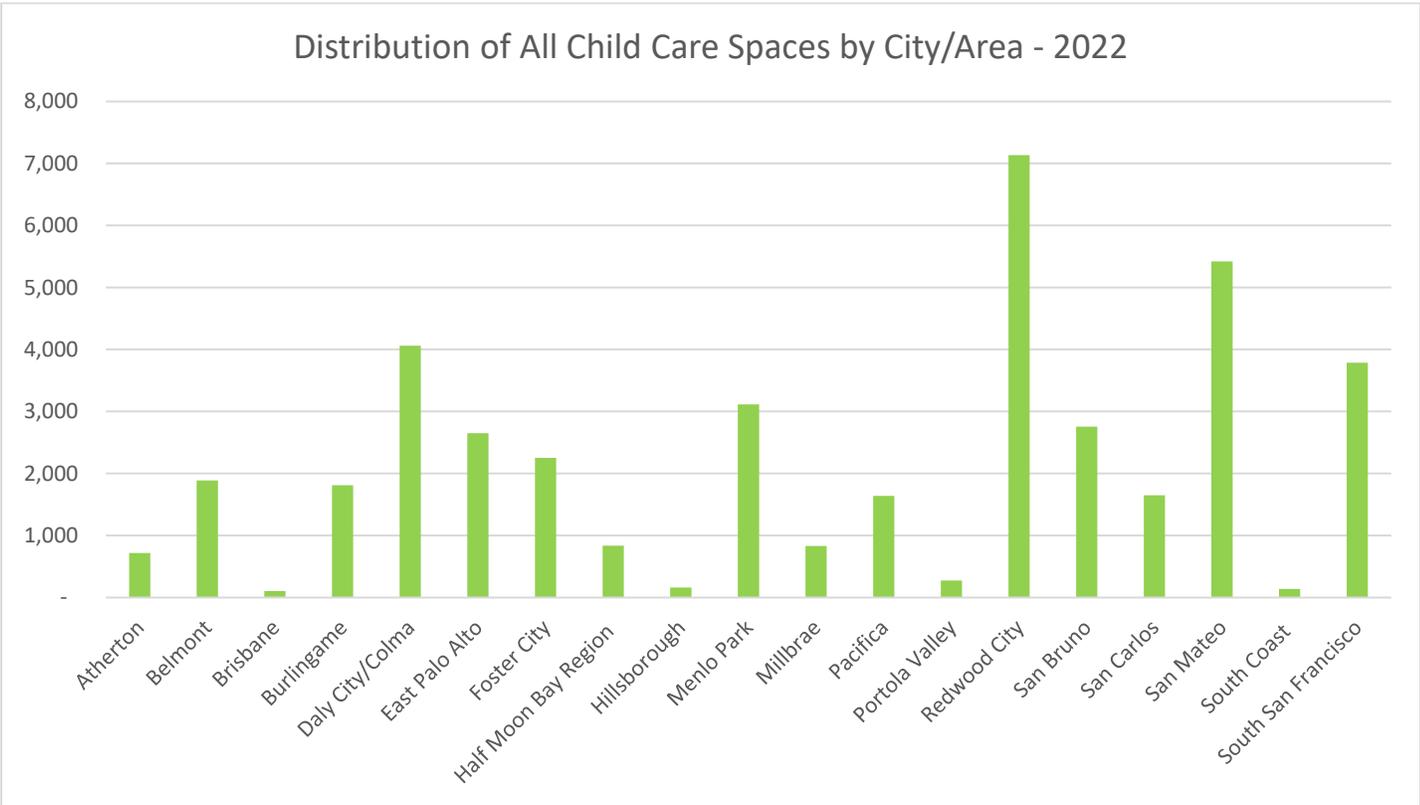
**Exhibit 2-4**



Future Child Care Supply

The analysis includes an estimate of the future supply of new child care providers and the number of spaces. **Table 2-7a** summarizes the current supply data. It is anticipated that supply will increase before 2032, but this is the best current information available. There are several new planned projects associated with Build Up San Mateo, and a few pending FCCs and Centers waiting for a new license. The new supply data are listed by City/Area, type, and age group. There are a total of 27 new providers or licenses with 237 Infant spaces and 825 Preschool spaces, totaling 1,062 new child care spaces.<sup>16</sup> These data are added to the current supply estimates by location for the future supply and demand analysis, discussed below. These new spaces in 2023 comprise a 2.6% increase in supply countywide over 2022 conditions, as shown in **Table 2-7a**.

**Exhibit 2-5**



Estimated Surplus or Shortage of Child Care Spaces

**Table 2-8** summarizes the overall surplus or shortfall of child care demand by age group and City/Area. In total, there is a shortage of 17,158 child care spaces as of 2022, based on the analysis described

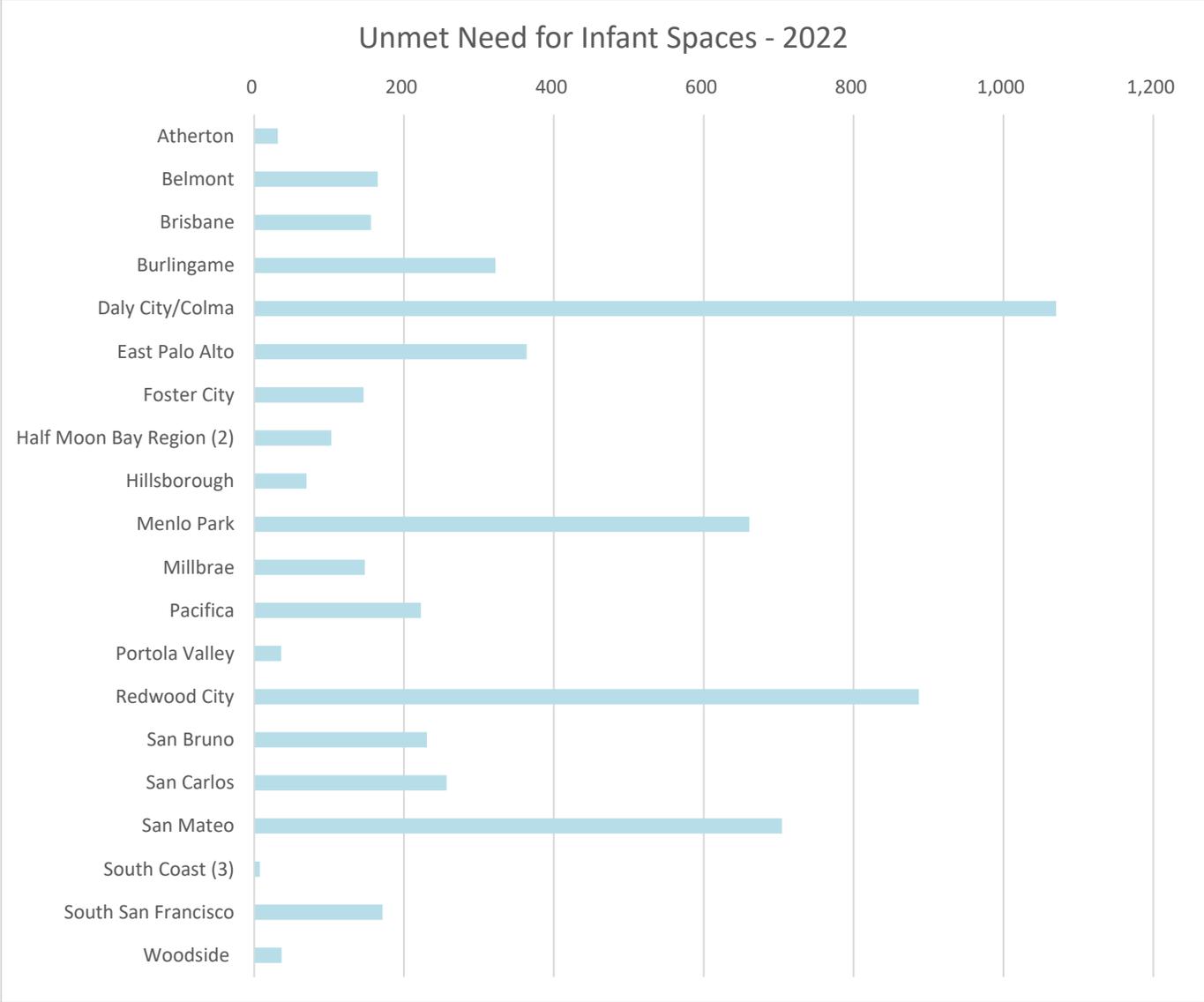
<sup>16</sup> Note there is no known new School Age projects currently.

above. The overall percentage of demand met for all age groups is 71%. Countywide, only 34% of the demand for Infant spaces is currently met, representing a shortage of 5,791 spaces. For Preschool, there is a shortage of 1,107 spaces, and 94% of Preschool demand is met. For School Age care, there is a shortage of 10,260 spaces and 66% of current School Age demand is being met. The shortfalls vary significantly by City/Area as shown in the following graphs. (Note: a negative number in these charts connotes a surplus of supply.)

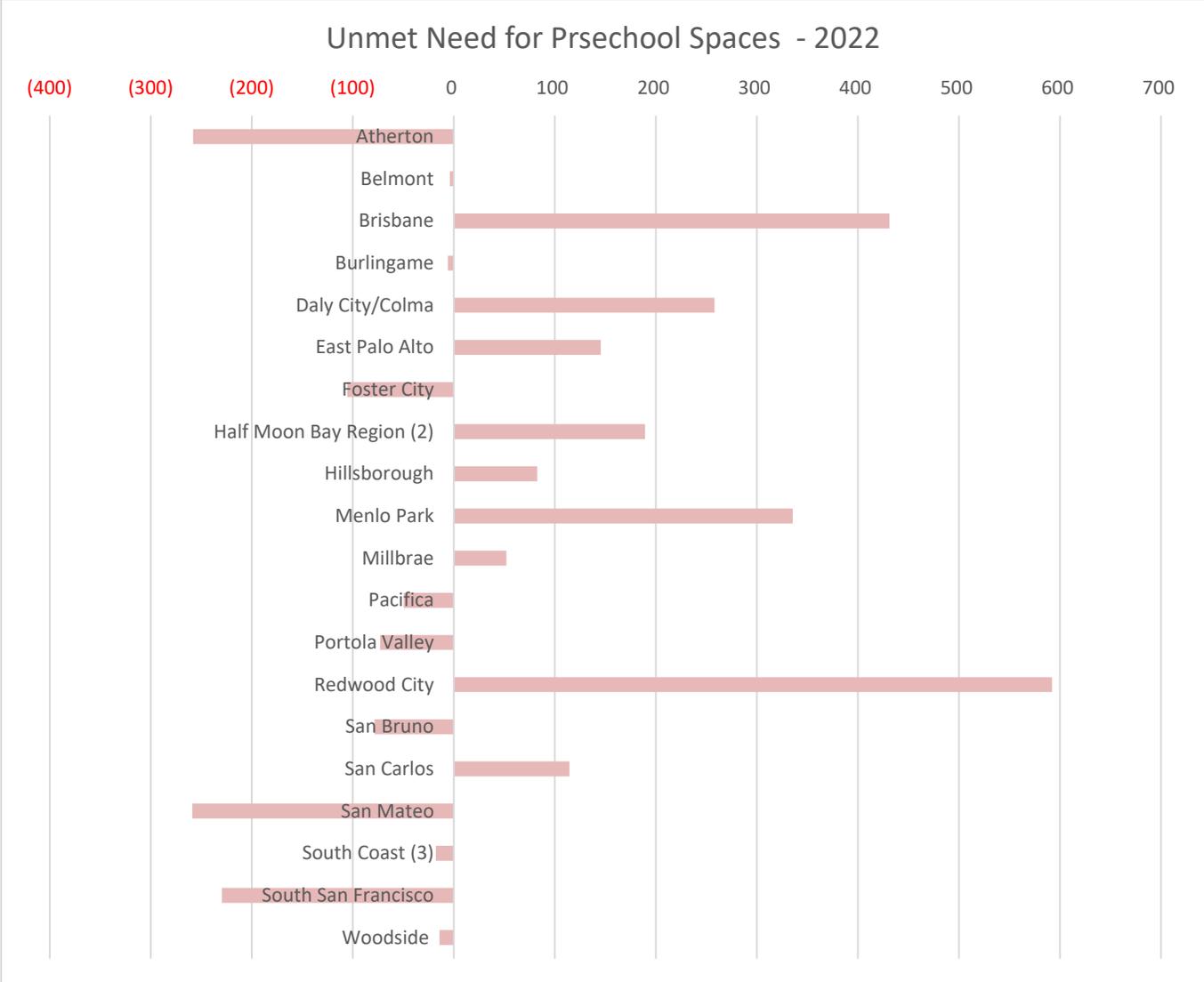
**Table 2-9** summarizes the supply and demand in 2032 for all age groups combined. Countywide, there is a shortfall of 22,217 spaces, and overall, 66% of the total demand is met. This includes the new additional supply of about 1,062 spaces. Roughly two-thirds of children that need a child care space can potentially find one, assuming the spaces are affordable and located near their place of residence or parents' work. However, these rates also vary significantly by City/Area. In total, there will be an estimated shortfall of 5,191 Infant spaces, 540 Preschool spaces, and 16,487 School Age spaces in 2032. This shortfall is 6,100 spaces greater than the shortfall in 2022, due to changes in demographics, shifts in demand factors, increased availability of Transitional Kindergarten, and new supply.

**Exhibits 2-5 to 2-8** summarize the unmet need for child care by age group and the total for each City/Area. All **Chapter 2 summary** tables are presented below.

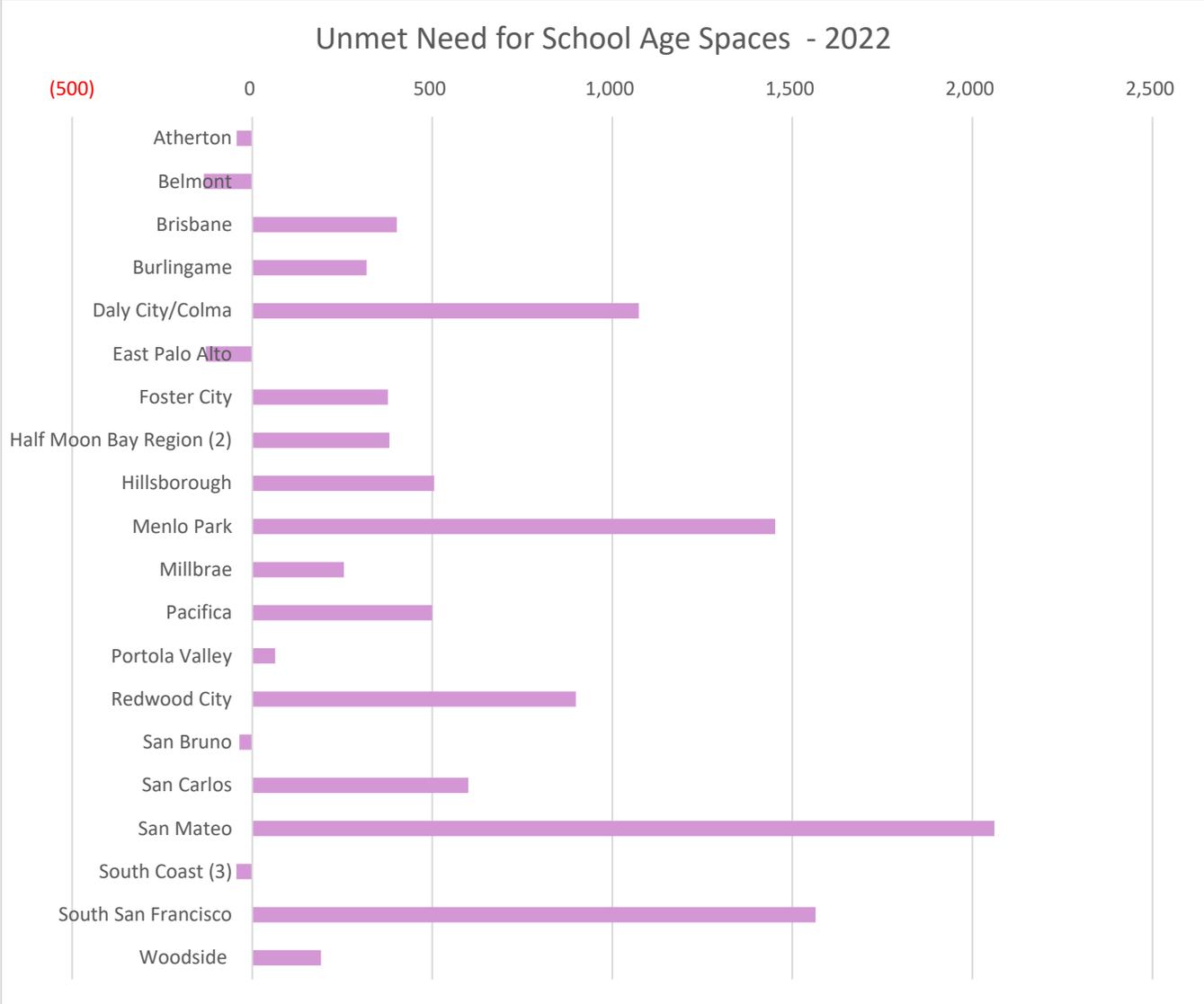
Exhibit 2-6



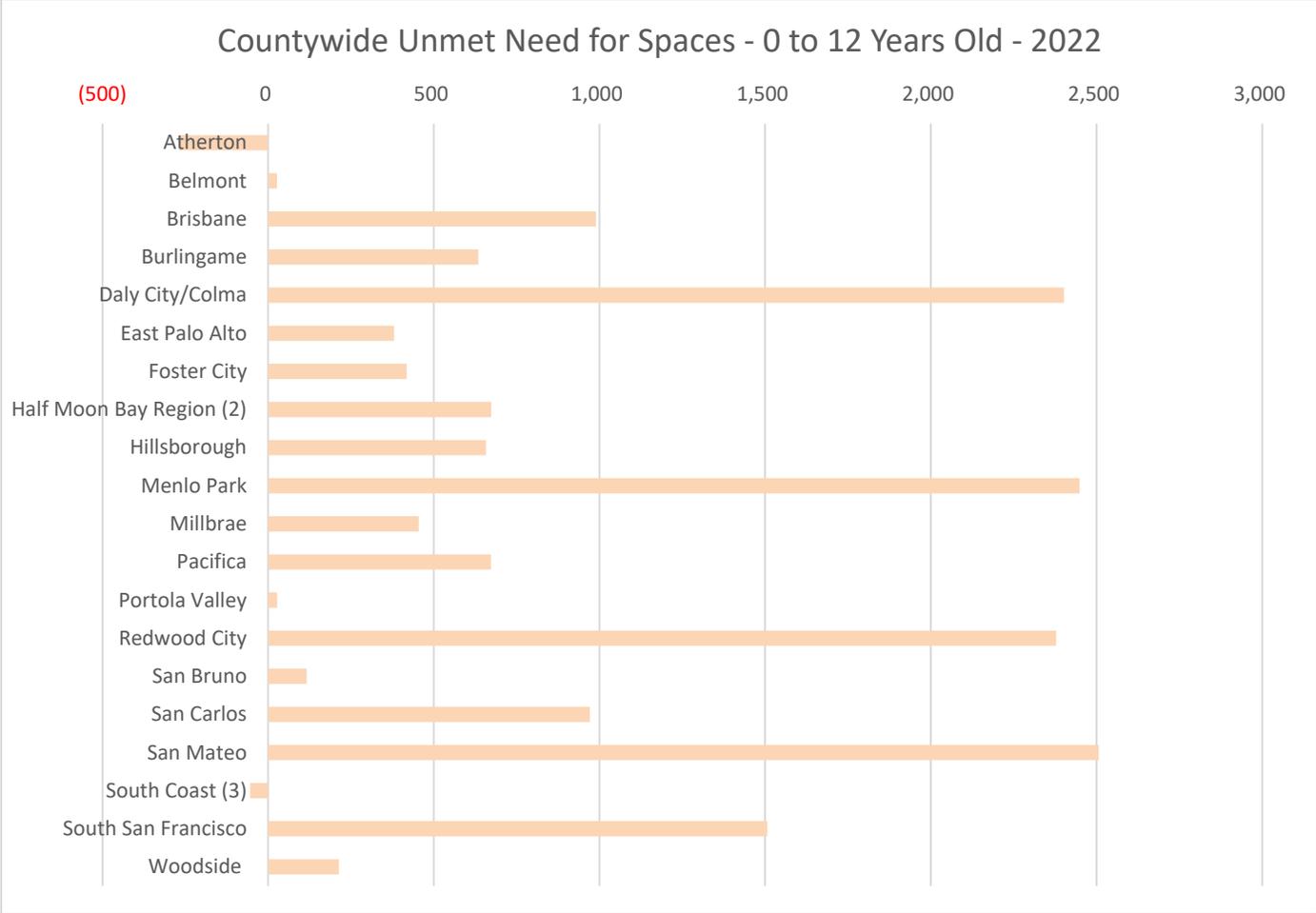
**Exhibit 2-7**



**Exhibit 2-8**



**Exhibit 2-9**



**Table 2-1**  
**Population Summary by City/Area - 2022**  
**San Mateo County Child Care Needs Assessment - 2022**

City/Area	Estimated 2022 Population (ABAG)	Adjusted 2022 Population w/ SOI (1)
Atherton	7,408	7,408
Belmont	27,517	27,721
Brisbane	15,057	15,057
Burlingame	30,405	31,460
Daly City/Colma	113,421	119,563
East Palo Alto	30,793	30,793
Foster City	33,258	33,258
Half Moon Bay Region (2)	13,106	25,304
Hillsborough	11,497	11,497
Menlo Park	46,114	52,799
Millbrae	22,472	22,472
Pacifica	38,162	38,162
Portola Valley	4,598	6,744
Redwood City	84,533	103,683
San Bruno	42,377	42,377
San Carlos	33,355	35,128
San Mateo	111,606	115,923
South Coast (3)	1,191	2,069
South San Francisco	68,105	76,933
Woodside	5,688	6,388
Unincorporated	64,076	na
<b>Total</b>	<b>804,739</b>	<b>804,739</b>

(1) Population data is from ABAG Projections 2040; for unincorporated areas data been allocated to city/areas, based on ABAG's estimate of Sphere of Influence data from Projections 2013, the most recent information available for SOI data.

(2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

(3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); Brion Economics, Inc.

**Table 2-2**  
**Population Growth by City/Area - 2022 and 2032**  
**San Mateo County Child Care Study - 2022**

City/Area (1)	Estimated Population at 2022 (1)	Estimated Population at 2032 (1)	CHANGE 2022 to 2032	
			2022 to 2032	% Change
Atherton	7,408	7,551	143	1.9%
Belmont	27,721	28,651	930	3.4%
Brisbane	15,057	15,203	146	1.0%
Burlingame	31,460	33,194	1,734	5.5%
Daly City/Colma	119,563	125,530	5,966	5.0%
East Palo Alto	30,793	32,601	1,808	5.9%
Foster City	33,258	34,557	1,299	3.9%
Half Moon Bay Region (2)	25,304	25,459	155	0.6%
Hillsborough	11,497	11,660	163	1.4%
Menlo Park	52,799	60,799	8,000	15.2%
Millbrae	22,472	26,691	4,219	18.8%
Pacifica	38,162	39,113	951	2.5%
Portola Valley	6,744	6,826	82	1.2%
Redwood City	103,683	114,270	10,587	10.2%
San Bruno	42,377	45,430	3,053	7.2%
San Carlos	35,128	36,036	908	2.6%
San Mateo	115,923	129,438	13,515	11.7%
South Coast (3)	2,069	2,131	62	3.0%
South San Francisco	76,933	81,549	4,616	6.0%
Woodside	6,388	6,474	86	1.4%
<b>Total</b>	<b>804,739</b>	<b>863,164</b>	<b>58,424</b>	<b>7.3%</b>

(1) Population data is from ABAG Projections 2040; for unincorporated areas data been allocated to city/areas, based on ABAG's estimate of Sphere of Influence data from Projections 2013, the most recent information available for SOI data.

(2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

(3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); Brion Economics, Inc.

**Table 2-3**  
**Children by Age Group by City/Area - 2022**  
**San Mateo County Child Care Needs Assessment - 2022**

City/Area (1)	2022							Children 12 and Under as % of Total Population
	Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years	
Atherton	112	60	40	43	144	614	870	11.7%
Belmont	612	246	438	291	975	2,091	3,678	13.3%
Brisbane	268	233	276	100	609	1,006	1,883	12.5%
Burlingame	683	455	246	359	1,060	2,463	4,206	13.4%
Daly City/Colma	3,143	915	1,006	336	2,257	7,561	12,961	10.8%
East Palo Alto	1,076	557	446	473	1,476	3,472	6,024	19.6%
Foster City	635	521	377	447	1,345	2,869	4,849	14.6%
Half Moon Bay Region (2)	374	307	222	263	792	1,716	2,882	11.4%
Hillsborough	164	109	59	86	255	1,216	1,635	14.2%
Menlo Park	1,619	867	623	1,256	2,746	5,722	10,088	19.1%
Millbrae	380	253	137	199	589	1,482	2,451	10.9%
Pacifica	757	427	466	153	1,047	2,780	4,584	12.0%
Portola Valley	68	36	25	26	88	412	568	8.4%
Redwood City	3,188	1,395	1,712	1,328	4,435	10,355	17,978	17.3%
San Bruno	685	592	703	257	1,552	3,175	5,412	12.8%
San Carlos	746	300	534	355	1,189	3,009	4,944	14.1%
San Mateo	2,365	1,743	1,102	1,436	4,281	8,047	14,693	12.7%
South Coast (3)	21	17	12	15	44	103	168	8.1%
South San Francisco	1,147	989	1,175	430	2,594	5,251	8,992	11.7%
Woodside	84	37	45	35	117	501	702	11.0%
<b>Total by Age</b>	<b>18,127</b>	<b>10,061</b>	<b>9,645</b>	<b>7,890</b>	<b>27,596</b>	<b>63,843</b>	<b>109,566</b>	<b>13.6%</b>
<b>Percent Distribution</b>	<b>16.5%</b>	<b>9.2%</b>	<b>8.8%</b>	<b>7.2%</b>	<b>25.2%</b>	<b>58.3%</b>	<b>100.0%</b>	

(1) Estimates of children by age group is from ABAG Projections 2040, and adjusted to age groups for this study.  
 AIR Data by Zip Code sorted by city and community is used to distribute children in unincorporated areas to areas with large SOIs.  
 (2) Half Moon Bay Region includes the City of Half Moon Bay, El Granada, Montara, and Moss Beach.  
 (3) South Coast includes Loma Mar, La Honda, Pescadero and San Gregorio.  
 Sources: American Community Survey 2018; ABAG Projections 2040 (Oct 21); Brion Economics, Inc.

Table 2-3a

## Children by Age Group by City - 2032

## San Mateo County Child Care Needs Assessment - 2022

City/Area (1)	2032							Children 12 and Under as % of Total Population
	Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years	
Atherton	102	55	37	40	132	563	797	10.6%
Belmont	580	233	415	276	924	2,007	3,511	12.3%
Brisbane	255	221	261	95	577	969	1,801	11.8%
Burlingame	661	441	238	348	1,027	2,417	4,105	12.4%
Daly City/Colma	2,967	863	950	317	2,130	7,214	12,311	9.8%
East Palo Alto	1,074	557	446	472	1,475	3,539	6,088	18.7%
Foster City	612	502	363	431	1,296	2,799	4,707	13.6%
Half Moon Bay Region (2)	355	291	210	250	751	1,647	2,753	10.8%
Hillsborough	150	100	54	79	234	1,125	1,509	12.9%
Menlo Park	1,666	892	641	1,292	2,825	5,950	10,440	17.2%
Millbrae	403	269	145	212	627	1,589	2,619	9.8%
Pacifica	722	407	444	146	997	2,672	4,391	11.2%
Portola Valley	60	32	22	23	78	371	509	7.5%
Redwood City	3,217	1,408	1,727	1,340	4,475	10,582	18,274	16.0%
San Bruno	676	584	695	254	1,533	3,178	5,387	11.9%
San Carlos	708	285	506	336	1,127	2,887	4,722	13.1%
San Mateo	2,413	1,778	1,124	1,466	4,369	8,301	15,083	11.7%
South Coast (3)	20	17	12	15	43	100	163	7.7%
South San Francisco	1,179	1,017	1,208	442	2,668	5,458	9,305	11.4%
Woodside	78	34	42	32	108	465	651	10.0%
<b>Total by Age</b>	<b>17,899</b>	<b>9,987</b>	<b>9,542</b>	<b>7,865</b>	<b>27,394</b>	<b>63,833</b>	<b>109,126</b>	<b>12.6%</b>
<b>Percent Distribution</b>	<b>16.4%</b>	<b>9.2%</b>	<b>8.7%</b>	<b>7.2%</b>	<b>25.1%</b>	<b>58.5%</b>	<b>100.0%</b>	

(1) Estimates of children by age group is from ABAG Projections 2040, and adjusted to age groups for this study. AIR Data by Zip Code sorted by city and community is used to distribute children in unincorporated areas to areas with large SOIs.

(2) Half Moon Bay Region includes the City of Half Moon Bay, El Granada, Montara, and Moss Beach.

(3) South Coast includes Loma Mar, La Honda, Pescadero and San Gregorio.

Sources: American Community Survey 2018; ABAG Projections 2040 (Oct 21); Brion Economics, Inc.

**Table 2-3b**  
**Net Change in Children by Age Group by City 2022 and 2032**  
**San Mateo County Child Care Needs Assessment - 2022**

City/Area (1)	INCREASE/(DECREASE) 2022 to 2032						
	Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2- 4 Years	School Age, 5-12 Years	Total, 0-12 Years
Atherton	(10)	(5)	(3)	(4)	(12)	(50)	(72)
Belmont	(32)	(13)	(23)	(15)	(51)	(84)	(167)
Brisbane	(14)	(12)	(14)	(5)	(31)	(37)	(82)
Burlingame	(22)	(14)	(8)	(11)	(33)	(46)	(101)
Daly City/Colma	(176)	(51)	(56)	(19)	(127)	(346)	(649)
East Palo Alto	(1)	(1)	(1)	(1)	(2)	67	64
Foster City	(23)	(19)	(14)	(16)	(49)	(70)	(142)
Half Moon Bay Region (2)	(19)	(16)	(11)	(14)	(41)	(68)	(129)
Hillsborough	(14)	(9)	(5)	(7)	(21)	(91)	(126)
Menlo Park	46	25	18	36	79	227	352
Millbrae	24	16	9	13	37	107	168
Pacifica	(36)	(20)	(22)	(7)	(49)	(108)	(193)
Portola Valley	(8)	(4)	(3)	(3)	(10)	(41)	(59)
Redwood City	29	13	15	12	40	227	296
San Bruno	(9)	(7)	(9)	(3)	(19)	4	(24)
San Carlos	(39)	(16)	(28)	(18)	(61)	(122)	(222)
San Mateo	48	36	23	29	88	254	390
South Coast (3)	(1)	(1)	(0)	(1)	(2)	(2)	(5)
South San Francisco	32	28	33	12	74	207	313
Woodside	(6)	(3)	(3)	(3)	(9)	(37)	(52)
<b>Total by Age</b>	<b>(229)</b>	<b>(74)</b>	<b>(103)</b>	<b>(25)</b>	<b>(201)</b>	<b>(10)</b>	<b>(440)</b>
<b>Percent Decrease</b>	<b>-1.3%</b>	<b>-0.7%</b>	<b>-1.1%</b>	<b>-0.3%</b>	<b>-0.7%</b>	<b>0.0%</b>	<b>-0.4%</b>

- (1) Estimates of children by age group is from ABAG Projections 2040, and adjusted to age groups for this study. AIR Data by Zip Code sorted by city and community is used to distribute children in unincorporated areas to areas with large SOIs.
- (2) Half Moon Bay Region includes the City of Half Moon Bay, El Granada, Montara, and Moss Beach.
- (3) South Coast includes Loma Mar, La Honda, Pescadero and San Gregorio.
- Sources: American Community Survey 2018; ABAG Projections 2040 (Oct 21); Brion Economics, Inc.

**Table 2-4**  
**Employment Growth by City/Area - 2022 and 2032**  
**San Mateo County Child Care Study - 2022**

City/Area (1)	Estimated Jobs at 2022	Estimated Jobs at 2032	CHANGE 2022 to 2032	
			2022 to 2032	% Change
Atherton	2,142	2,154	12	0.6%
Belmont	9,264	9,427	163	1.8%
Brisbane	9,056	14,227	5,171	57.1%
Burlingame	32,387	34,722	2,335	7.2%
Daly City/Colma	22,484	23,045	561	2.5%
East Palo Alto	5,918	6,337	419	7.1%
Foster City	24,308	25,789	1,481	6.1%
Half Moon Bay Region (2)	9,875	10,002	127	1.3%
Hillsborough	2,214	2,235	21	0.9%
Menlo Park	36,634	37,427	793	2.2%
Millbrae	6,594	6,992	398	6.0%
Pacifica	6,178	6,281	103	1.7%
Portola Valley	1,520	1,520	-	0.0%
Redwood City	71,480	74,009	2,529	3.5%
San Bruno	14,661	14,757	96	0.7%
San Carlos	17,878	18,392	514	2.9%
San Mateo	63,348	67,406	4,058	6.4%
South Coast (3)	0	0	0	0.0%
South San Francisco (4)	63,377	67,108	3,730	5.9%
Woodside	2,000	2,000	0	0.0%
Remainder (5)	4,368	4,455	87	2.0%
<b>Total Employment</b>	<b>405,687</b>	<b>428,285</b>	<b>22,598</b>	<b>5.6%</b>

*Note the distribution of employees between those that live and work in each area is based on ACS 5-Year data as of 2019, applied to ABAG data.*

(1) ABAG data has been adjusted by city/area to include sphere of influence data near each area, based on prior ABAG projections.

(2) For employment, Half Moon Bay Region includes all of the City of Half Moon Bay and Unincorporated Half Moon Bay, as defined by ABAG.

(3) No data on employment is available through ABAG for the South Coast area.

(4) Includes jobs associated with SF Airport.

(5) Journey-to-Work data is not available for the remainder.

Sources: ABAG Projections 2040 (Oct 21); ACS 5-Year (2019); and Brion Economics, Inc.

**Table 2-4a**  
**Employee Place of Residence by City/Area - 2022 and 2032**  
**San Mateo County Child Care Study - 2022**

City/Area (1)	2022		2032	
	Percent that Work in City and Live Outside County	Employees that Work in City and Live Outside County	Percent that Work in City and Live Outside County	Employees that Work in City and Live Outside County
Atherton	46.3%	992	46.3%	997
Belmont	39.1%	3,622	39.1%	3,685
Brisbane	54.6%	4,940	54.6%	7,761
Burlingame	39.7%	12,852	39.7%	13,778
Daly City/Colma	54.1%	12,163	54.1%	12,467
East Palo Alto	54.5%	3,223	54.5%	3,451
Foster City	36.3%	8,815	36.3%	9,352
Half Moon Bay Region (2)	26.8%	2,649	26.8%	2,683
Hillsborough	44.5%	985	44.5%	994
Menlo Park	54.3%	19,878	54.3%	20,308
Millbrae	44.9%	2,963	44.9%	3,142
Pacifica	45.6%	2,819	45.6%	2,866
Portola Valley	59.6%	906	59.6%	906
Redwood City	35.2%	25,175	35.2%	26,066
San Bruno	40.3%	5,914	40.3%	5,953
San Carlos	37.9%	6,772	37.9%	6,966
San Mateo	34.3%	21,730	34.3%	23,122
South Coast (3)	36.8%	0	36.8%	0
South San Francisco (4)	42.8%	27,152	42.8%	28,751
Woodside	39.6%	792	39.6%	792
Remainder (5)				
<b>Total Employment</b>	<b>40.5%</b>	<b>164,340</b>	<b>40.6%</b>	<b>174,040</b>

*Note the distribution of employees between those that live and work in each area is based on ACS 5-Year data as of 2019, applied to ABAG data.*

- (1) ABAG data has been adjusted by city/area to include sphere of influence data near each area, based on prior ABAG projections.
- (2) For employment, Half Moon Bay Region includes all of the City of Half Moon Bay and Unincorporated Half Moon Bay, as defined by ABAG.
- (3) No data on employment is available through ABAG for the South Coast area.
- (4) Includes jobs associated with SF Airport.
- (5) Journey-to-Work data is not available for the remainder.

Sources: ABAG Projections 2040 (Oct 21); ACS 5-Year (2019); and Brion Economics, Inc.

**Table 2-5  
 Child Care Demand (Resident and Employee) Summary by City/Area - 2022  
 San Mateo County Child Care Study - 2022**

City/Area (1)	Child Care Demand at 2022				
	Infant, Under 2 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years	City/Area as % of Total Demand
Atherton	54	106	288	447	0.8%
Belmont	271	662	981	1,914	3.3%
Brisbane	159	461	472	1,093	1.9%
Burlingame	408	880	1,155	2,443	4.2%
Daly City/Colma	1,315	1,600	3,546	6,461	11.0%
East Palo Alto	439	962	1,628	3,029	5.2%
Foster City	342	982	1,345	2,669	4.6%
Half Moon Bay Region (2)	171	532	805	1,508	2.6%
Hillsborough	73	174	570	817	1.4%
Menlo Park	841	2,039	2,684	5,563	9.5%
Millbrae	177	414	695	1,286	2.2%
Pacifica	316	691	1,304	2,311	3.9%
Portola Valley	36	70	193	299	0.5%
Redwood City	1,488	3,167	4,856	9,512	16.3%
San Bruno	326	1,057	1,489	2,871	4.9%
San Carlos	359	849	1,411	2,619	4.5%
San Mateo	1,141	3,011	3,774	7,926	13.5%
South Coast (3)	8	27	48	83	0.1%
South San Francisco	752	2,076	2,463	5,292	9.0%
Woodside	41	86	235	362	0.6%
<b>Total</b>	<b>8,715</b>	<b>19,847</b>	<b>29,942</b>	<b>58,505</b>	<b>100.0%</b>

- (1) Population of unincorporated areas has been allocated per city/area, based on ABAG's estimate of Sphere of Influence data from Projections 2040, the most recent information available for SOI data.
- (2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.
- (3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table 2-5a**  
**Child Care Demand (Resident and Employee) Summary by City/Area - 2032**  
**San Mateo County Child Care Study - 2022**

City/Area (1)	Child Care Demand at 2032				City/Area as % of Total Demand
	Infant, Under 2 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years	
Atherton	48	98	313	458	0.7%
Belmont	247	626	1,143	2,017	3.1%
Brisbane	182	511	544	1,237	1.9%
Burlingame	397	859	1,380	2,636	4.1%
Daly City/Colma	1,188	1,603	3,964	6,755	10.5%
East Palo Alto	417	947	2,013	3,377	5.2%
Foster City	326	941	1,604	2,872	4.5%
Half Moon Bay Region (2)	156	496	944	1,596	2.5%
Hillsborough	65	157	624	846	1.3%
Menlo Park	827	1,954	3,492	6,272	9.7%
Millbrae	179	429	904	1,512	2.3%
Pacifica	287	698	1,475	2,459	3.8%
Portola Valley	32	63	205	301	0.5%
Redwood City	1,439	3,179	6,004	10,621	16.5%
San Bruno	308	1,092	1,771	3,171	4.9%
San Carlos	331	808	1,632	2,771	4.3%
San Mateo	1,122	3,018	4,799	8,940	13.9%
South Coast (3)	7	25	57	90	0.1%
South San Francisco	758	2,231	3,043	6,032	9.4%
Woodside	37	80	258	374	0.6%
<b>Total</b>	<b>8,353</b>	<b>19,815</b>	<b>36,169</b>	<b>64,337</b>	<b>100.0%</b>
<b>Amount Change over 2022</b>	<b>(362)</b>	<b>(31)</b>	<b>6,227</b>	<b>5,833</b>	
<b>Percent Change over 2022</b>	<b>-4.2%</b>	<b>-0.2%</b>	<b>20.8%</b>	<b>10.0%</b>	

- (1) Population of unincorporated areas has been allocated per city/area, based on ABAG's estimate of Sphere of Influence data from Projections '13, the most recent information available for SOI data.
- (2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.
- (3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table 2-6**  
**Number of Child Care Providers by City/Area - 2022**  
**San Mateo County Child Care Study - 2022**

City/Area (1)	Family Child Care Homes	Licensed and License-Exempt Centers	Total All Providers	Percent of Providers
Atherton	1	8	9	0.9%
Belmont	11	21	32	3.2%
Brisbane	1	1	2	0.2%
Burlingame	18	23	41	4.1%
Daly City/Colma	63	40	103	10.2%
East Palo Alto	28	17	45	4.5%
Foster City	25	21	46	4.6%
Half Moon Bay Region (2)	14	16	30	3.0%
Hillsborough	1	4	5	0.5%
Menlo Park	22	44	66	6.5%
Millbrae	11	13	24	2.4%
Pacifica	22	20	42	4.2%
Portola Valley	0	4	4	0.4%
Redwood City	98	75	173	17.1%
San Bruno	31	30	61	6.0%
San Carlos	12	24	36	3.6%
San Mateo	113	83	196	19.4%
South Coast (3)	0	3	3	0.3%
South San Francisco	53	35	88	8.7%
Woodside	1	2	3	0.3%
<b>Countywide</b>	<b>525</b>	<b>484</b>	<b>1,009</b>	<b>100%</b>
Percent Distribution	52%	48%	100%	

(1) Population of unincorporated areas has been allocated per city/area, based on ABAG's estimate of Sphere of Influence data from Projections 2040, the most recent information available for SOI data.

(2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

(3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 4Cs-Child Care Coordinating Council of San Mateo County; Child Care Partnership Council, and Community Care Licensing, CA Department of Social Services; Brion Economics, Inc.

**Table 2-7**  
**Child Care Supply of Spaces by Age Group and City/Area - 2022**  
**San Mateo County Child Care Study - 2022**

City/Area (1)	Infant, Under 2 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total Supply	City/Area as % of Total Supply
Atherton	22	364	331	717	1.7%
Belmont	106	666	1,115	1,887	4.6%
Brisbane	3	30	70	103	0.2%
Burlingame	86	886	837	1,809	4.4%
Daly City/Colma	245	1,342	2,472	4,059	9.8%
East Palo Alto	75	816	1,757	2,648	6.4%
Foster City	196	1,087	968	2,251	5.4%
Half Moon Bay Region (2)	68	343	423	834	2.0%
Hillsborough	3	91	65	159	0.4%
Menlo Park	180	1,703	1,231	3,114	7.5%
Millbrae	29	362	440	831	2.0%
Pacifica	93	741	804	1,638	4.0%
Portola Valley	0	143	129	272	0.7%
Redwood City	601	2,575	3,957	7,133	17.3%
San Bruno	95	1,135	1,524	2,754	6.7%
San Carlos	102	735	811	1,648	4.0%
San Mateo	436	3,270	1,713	5,419	13.1%
South Coast (3)	0	45	92	137	0.3%
South San Francisco	581	2,306	898	3,785	9.2%
Woodside	4	100	44	148	0.4%
<b>Total</b>	<b>2,925</b>	<b>18,740</b>	<b>19,682</b>	<b>41,347</b>	<b>100.0%</b>
Percent Distribution	7%	45%	48%	100%	

(1) Population of unincorporated areas has been allocated per city/area, based on ABAG's estimate of Sphere of Influence data from Projections 2040, the most recent information available for SOI data.

(2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

(3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 4Cs-Child Care Coordinating Council of San Mateo County; Child Care Partnership Council, and Community Care Licensing, CA Department of Social Services; Brion Economics, Inc.

**Table 2-7a**  
**Future Supply of New Providers and Spaces by Age Group and City/Area**  
**San Mateo County Child Care Study - 2022**

City/Area	Provider Type	Number of New Providers	Infant, Under 2 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total Future New 0-4 Years Supply
Daly City	Center	3	-	141	-	141
Daly City	FCCH	1	3	3	-	6
East Palo Alto	Center	1	-	24	-	24
Half Moon Bay	Center	1	18	-	-	18
Menlo Park	Center	2	12	24	-	36
Pacifica	FCCH	1	3	3	-	6
Pescadero	Center	1	12	-	-	12
Portola Valley	Center	1	-	40	-	40
Redwood City	Center	5	102	266	-	368
San Bruno	FCCH	1	3	3	-	6
San Mateo	Center	5	30	175	-	205
San Mateo	FCCH	2	6	6	-	12
South San Francisco	Center	3	48	140	-	188
<b>Total New Supply</b>		<b>27</b>	<b>237</b>	<b>825</b>	-	<b>1,062</b>
<b>Percent Increase in Supply</b>		2.7%	8.1%	4.4%	na	4.9%

*Note: Includes planned projects from Build Up San Mateo and pending child care licenses.*

Sources: 4Cs-Child Care Coordinating Council of San Mateo County; Child Care Partnership Council, and Community Care Licensing, CA Department of Social Services; Brion Economics, Inc.

Table 2-8

Summary of Demand Met by Existing Facilities by City/Area - 2022

San Mateo County Child Care Study - 2022

City/Area (1)	2022 Surplus/(Shortage) of Spaces							
	Infant Spaces	% of Infant Demand Met	Preschool Spaces	% of Preschool Demand Met	School Age Spaces	% of School Age Demand Met	Total Surplus or (Shortage)	% of Total Demand Met
Atherton	(32)	41%	258	344%	43	115%	270	160%
Belmont	(165)	39%	4	101%	134	114%	(27)	99%
Brisbane	(156)	2%	(431)	7%	(402)	15%	(990)	9%
Burlingame	(322)	21%	6	101%	(318)	72%	(634)	74%
Daly City/Colma	(1,070)	19%	(258)	84%	(1,074)	70%	(2,402)	63%
East Palo Alto	(364)	17%	(146)	85%	129	108%	(380)	87%
Foster City	(146)	57%	105	111%	(377)	72%	(418)	84%
Half Moon Bay Region (2)	(103)	40%	(189)	64%	(381)	53%	(674)	55%
Hillsborough	(70)	4%	(83)	52%	(505)	11%	(658)	19%
Menlo Park	(661)	21%	(336)	84%	(1,453)	46%	(2,449)	56%
Millbrae	(148)	16%	(52)	87%	(255)	63%	(455)	65%
Pacifica	(223)	29%	50	107%	(500)	62%	(673)	71%
Portola Valley	(36)	0%	73	204%	(64)	67%	(27)	91%
Redwood City	(887)	40%	(592)	81%	(899)	81%	(2,378)	75%
San Bruno	(231)	29%	78	107%	35	102%	(117)	96%
San Carlos	(257)	28%	(114)	87%	(600)	57%	(971)	63%
San Mateo	(705)	38%	259	109%	(2,061)	45%	(2,507)	68%
South Coast (3)	(8)	0%	18	165%	44	191%	54	165%
South San Francisco	(171)	77%	230	111%	(1,565)	36%	(1,507)	72%
Woodside	(37)	10%	14	117%	(191)	19%	(214)	41%
<b>Countywide</b>	<b>(5,790)</b>	<b>34%</b>	<b>(1,107)</b>	<b>94%</b>	<b>(10,260)</b>	<b>66%</b>	<b>(17,157)</b>	<b>71%</b>

(1) Population of unincorporated areas has been allocated per city/area, based on ABAG's estimate of Sphere of Influence data from Projections 2040, the most recent information available for SOI data.

(2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

(3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table 2-9**  
**Summary of Demand Met by Existing Facilities by City/Area - 2032**  
**San Mateo County Child Care Study - 2022**

City/Area (1)	2032 Surplus/(Shortage) of Spaces							
	Infant Spaces	% of Infant Demand Met	Preschool Spaces	% of Preschool Demand Met	School Age Spaces	% of School Age Demand Met	Total Surplus or (Shortage)	% of Total Demand Met
Atherton	(26)	46%	266	373%	18	106%	259	156%
Belmont	(141)	43%	40	106%	(28)	98%	(130)	94%
Brisbane	(179)	2%	(481)	6%	(474)	13%	(1,134)	8%
Burlingame	(311)	22%	27	103%	(543)	61%	(827)	69%
Daly City/Colma	(940)	21%	(117)	93%	(1,492)	62%	(2,549)	62%
East Palo Alto	(342)	18%	(107)	89%	(256)	87%	(705)	79%
Foster City	(130)	60%	146	115%	(636)	60%	(621)	78%
Half Moon Bay Region (2)	(70)	55%	(153)	69%	(520)	45%	(744)	53%
Hillsborough	(62)	5%	(66)	58%	(559)	10%	(687)	19%
Menlo Park	(635)	23%	(227)	88%	(2,261)	35%	(3,122)	50%
Millbrae	(150)	16%	(67)	84%	(464)	49%	(681)	55%
Pacifica	(191)	33%	46	107%	(671)	55%	(815)	67%
Portola Valley	(32)	0%	120	289%	(76)	63%	11	104%
Redwood City	(736)	49%	(338)	89%	(2,046)	66%	(3,120)	71%
San Bruno	(210)	32%	46	104%	(247)	86%	(411)	87%
San Carlos	(229)	31%	(73)	91%	(821)	50%	(1,123)	59%
San Mateo	(650)	42%	433	114%	(3,086)	36%	(3,304)	63%
South Coast (3)	5	171%	20	177%	35	161%	59	166%
South San Francisco	(129)	83%	215	110%	(2,145)	30%	(2,059)	66%
Woodside	(33)	11%	20	125%	(214)	17%	(226)	40%
<b>Countywide</b>	<b>(5,191)</b>	<b>38%</b>	<b>(250)</b>	<b>99%</b>	<b>(16,487)</b>	<b>54%</b>	<b>(21,928)</b>	<b>66%</b>

(1) Population of unincorporated areas has been allocated per city/area, based on ABAG's estimate of Sphere of Influence data from Projections 2040, the most recent information available for SOI data.

(2) Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

(3) South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio, where applicable. Census and ABAG do not include any data for San Gregorio.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

### 3. State-Mandated Needs Assessment

This chapter of the report provides the information and data that is prescribed for a County Needs Assessment by the State. The California Department of Social Services defines the data elements to be included in the child care needs assessment and has provided a template for reporting the data (see **Appendix C**). Each of the data presented represents the most current data available as noted and not all data is for 2022. For some required items, no local data is available, as noted. The table numbers also list the section numbers of the Needs Assessment template for ease of comparison.<sup>17</sup> Required data on population, children, supply of child care providers, and spaces are provided in **Chapter 2**.

#### Section 1a – Children by Age and Total Population

**Table 3-1** shows the number of children, ages 0 to 12, and the total population in San Mateo County as of 2022. This study uses data from the Association of Bay Area Governments (ABAG), *Projections 2040* report as the main source of demographic data (see **Chapter 2** for more discussion). The Needs Assessment *Instruction Guide* recommends using data from the Early Learning Needs Assessment Tool, which is from 2018; the ABAG data provides more current data and provides a forecast of growth, which is important to the County. Totals for each age group—Infants (0 to 24 months), Preschool (2 to 4 years), and School Age (5 to 12 years) are shown.

**Table 3-1 - Section 1a**  
**Children by Age Group, 0-12 Years Old in 2022**  
**San Mateo County Child Care Council Needs Assessment 2022**

Age in Years	Estimated Children and Population - 2022		
	Estimates 2022	% of Children 0-12 Years	% of Total Population
Total Infants (Under 2 Years)	18,127	16.54%	2.25%
Total Preschool (2-4 years)	27,596	25.19%	3.43%
Total School Age (5-12 years)	63,843	58.27%	7.93%
<b>Total Ages 0-12</b>	<b>109,566</b>	<b>100.00%</b>	<b>13.62%</b>
<b>Total San Mateo County Population</b>	<b>804,739</b>		

Sources: American Community Survey 2018; ABAG Projections 2040 (Oct 21); Brion Economics, Inc.

<sup>17</sup> Note **Appendix E** provides some additional demographic data on population and ethnicity from the CELNAT website that is suggested in the State Needs Assessment Template, but it is not used in this analysis.

**Table 3-1** also shows the percentage of each age as compared to the total children ages 0 to 12 years old, and to the population as a whole. It is estimated that the 2022 population of children 0 to 12 in San Mateo County is 109,566 and the total population is 804,739. By group, Infants make up 16.5% of children ages 0 to 12 and 2.3% of the County’s population, Preschool children comprise 25.2% of children ages 0 to 12 and 3.4% of the County’s population, and School Age children make up 58.3% of children ages 0 to 12 years and 7.9% of the County’s population. Overall, there are 109,566 children ages 0 to 12 in San Mateo County, and they make up 13.6% of the total population.

## Section 1b – Ethnicity of Children

**Table 3-2** shows the breakdown of race/ethnicity for the child population age groups and for total children, ages 0 to 12 years old as of 2020, which is the most current data available. Children who are white make up 31% of the 0 to 12 population. Hispanic/Latino children make up 33% of the 0 to 12 population in San Mateo County, and Asian Americans make up 17%. Multiracial children make up 9% of the total child population in the county. The next largest percentage is Filipino children at 7%. Black children comprise 1% of the total 0 to 12 population. All other race/ethnic groups combined comprise 2% of total children. The distribution of ethnicity among the study’s three age groups varies but follows a similar pattern as the total of children 0 to 12 years old. Data in **Table 3-2** is based on the American Institute for Research’s analysis of American Community Survey data (US Census, PUMS data) through CELNAT.<sup>18</sup> More detailed data on ethnicity by age group is provided in **Appendix E**.

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<sup>18</sup> Note that the total number of children shown in Table 3-2 is slightly higher than the data used in the Needs Assessment, as the data is from 2020.

**Table 3-2 - Section 1b**  
**Children Ages 0 to 12 Years Old by Race/Ethnicity as of 2020**  
**San Mateo County Child Care Needs Assessment - 2022**

<b>Ethnicity (1)</b>	<b>Infants - Under 2 Years</b>	<b>Preschool - 2- 4 Years</b>	<b>School Age - 5- 12 Years</b>	<b>Total 0-12 Years</b>
<b>Number of children, White</b>				
San Mateo	7,540	7,429	20,300	35,269
Percent of Total	32%	27%	32%	31%
<b>Number of children, Hispanic</b>				
San Mateo	6,646	9,680	21,302	37,628
Percent of Total	28%	35%	34%	33%
<b>Number of children, Asian</b>				
San Mateo	4,434	5,136	9,415	18,985
Percent of Total	19%	19%	15%	17%
<b>Number of children, Black or African American</b>				
San Mateo	335	318	960	1,613
Percent of Total	1%	1%	2%	1%
<b>Number of children, Filipino</b>				
San Mateo	1,252	1,810	4,486	7,548
Percent of Total	5%	7%	7%	7%
<b>Number of children, American Indian</b>				
San Mateo	-	-	72	72
Percent of Total	0%	0%	0%	0%
<b>Number of children, Alaska Native</b>				
San Mateo	-	-	-	-
Percent of Total	0%	0%	0%	0%
<b>Number of children, two or more races</b>				
San Mateo	2,646	1,946	5,729	10,321
Percent of Total	11%	7%	9%	9%
<b>Number of children, other race/ethnicity</b>				
San Mateo	581	965	1,116	2,662
Percent of Total	2%	4%	2%	2%
<b>Total Children, All Ethnicities</b>				
San Mateo	23,434	27,284	63,380	114,098
Percent of Total	100%	100%	100%	100%

(1) Number of children (one-year estimates from American Community Survey), source: AIR analysis of American Community Survey, Public Use Microdata Sample (PUMS) data, one-year estimates, by location of family residence; California Early Learning Needs Assessment Tool.  
 Sources: ACS; CELNAT; Brion Economics, Inc.

## Section 1c – Cost of Care by Age Group and Facility Type

**Table 3-3** shows the maximum monthly reimbursement rates for full-time and part-time child care at licensed centers and family child care homes (FCCHs) in San Mateo County. The first part of the table shows data for Title 22 programs, which include subsidized care through the Alternative Payment program and CalWORKs. The maximum reimbursement rates are from the California Department of Social Services for January 2022. The rate for a full-time Infant space at a center is \$2,168 per month and for FCCHs it is \$1,459. The rate for a full-time Preschool space at a center is \$1,642 per month and for FCCHs it is \$1,419. For School Age children, the maximum reimbursement rate for full-time care at a center is \$1,180 and for FCCHs it is \$1,350. Part-time maximum reimbursement rates are less, as shown below.

The second part of **Table 3-3** summarizes the daily rates for Title 5 direct state contractors for center-based subsidized care. The Infant care maximum reimbursement rate is about \$200 per day, and Preschool and School Age care is \$82 per day. The part-time daily rates for Title 5 programs are \$122 for Infant care and \$50 per day for Preschool and School Age care.

As discussed in more detail in **Chapter 4**, the State is in the process of reviewing all reimbursement rates and expects to have new proposed rates published in November 2022, after a detailed review and assessment of rates by type of program and provider.

**Table 3-3 - Section 1c**  
**Monthly and Daily Maximum Reimbursement Rates as of 2022**  
**San Mateo County Child Care Needs Assessment - 2022**

Type of Care	Infants Under 2 Years	Preschool 2-4 Years	School-Age 5-12 Years
<b>Title 22 (Alternative Payment, CalWORKs)</b>			
<b>Monthly Rates</b>			
Center-Based Care (1)			
Center Full-Time Maximum Reimbursement	\$2,168	\$1,642	\$1,180
Center Part-Time Maximum Reimbursement	\$1,319	\$993	\$537
Family Child Care Homes (1)			
FCCH Full-Time Maximum Reimbursement	\$1,459	\$1,419	\$1,350
FCCH Part-Time Maximum Reimbursement	\$1,050	\$1,108	\$723
<b>Title 5 - Direct Contractors (CCSP/CCTR)</b>			
<b>Daily Rates</b>			
Center-Based Care (1)			
Center Full-Time Maximum Reimbursement	\$200.28	\$82.08	\$82.08
Center Part-Time Maximum Reimbursement	\$122.17	\$50.07	\$50.07

(1) Maximum reimbursement cost data from <https://rcscc.adm.dss.ca.gov/index.aspx>. Viewed March 6, 2022 and current as of January 1, 2022.

Sources: California Department of Social Services (CDSS); San Mateo County Office of Education; Brion Economics, Inc.

**Table 3-3a** summarizes the change in reimbursement rates for Title 5 subsidized programs between 2018 and 2022 by age group. Overall, the average change or increase in rates is 14.2% but some types of care had much higher increases such as full-time School Age care at FCCHs at 41%.

**Table 3-3a - Section 1c**

**Change in Maximum Reimbursement for Subsidized Care in San Mateo County (Alternative Payment Program, CalWORKs)**

**San Mateo County Child Care Council Needs Assessment 2022**

Program Type	Age Group	Schedule	2018	2022	% Change
Center	Infant	Full-time Monthly	\$1,980	\$2,168	9.5%
Center	Preschool	Full-time Monthly	\$1,504	\$1,642	9.2%
Center	School Age	Full-time Monthly	\$960	\$1,180	22.9%
FCCH	Infant	Full-time Monthly	\$1,333	\$1,460	9.5%
FCCH	Preschool	Full-time Monthly	\$1,218	\$1,419	16.6%
FCCH	School Age	Full-time Monthly	\$957	\$1,350	41.0%
Center	Infant	Part-time Monthly	\$1,262	\$1,319	4.5%
Center	Preschool	Part-time Monthly	\$935	\$993	6.3%
Center	School Age	Part-time Monthly	\$537	\$537	0.0%
FCCH	Infant	Part-time Monthly	\$926	\$1,050	13.4%
FCCH	Preschool	Part-time Monthly	\$886	\$1,108	25.0%
FCCH	School Age	Part-time Monthly	\$646	\$723	11.9%
<b>Average Change</b>					<b>14.2%</b>

Note: In January 2022, the RMR moved to the 75th percentile of the 2018 Regional Market Rate Survey.

Source: <https://rcsc.adm.dss.ca.gov/>; SMC Office of Education; Brion Economics, Inc.

**Table 3-3b** summarizes changes in maximum Reimbursement rates for CSPP and CCTR subsidized care programs by age group and either full-time or part-time care, between 2021 and 2022. Overall, the average rate increase is 56.1%.

**Table 3-3b - Section 1c**

**Change in Maximum Reimbursement for Subsidized Care in San Mateo County (Direct Contractors - CSPP and CCTR)**

**San Mateo County Child Care Council Needs Assessment 2022**

Program Type	Age	Schedule	2021	2022	% Change
Center	Infant	Full-time Daily	\$130.22	\$200.28	53.8%
Center	Preschool	Full-time Daily	\$53.69	\$82.08	52.9%
Center	School Age	Full-time Daily	\$53.37	\$82.08	53.8%
Center	Infant	Part-time Daily	\$74.29	\$122.17	64.4%
Center	Preschool	Part-time Daily	\$32.21	\$50.07	55.4%
Center	School Age	Part-time Daily	\$32.02	\$50.07	56.4%
<b>Average Change</b>					<b>56.1%</b>

Note: In January 2022, the Standard Reimbursement Rate (SRR) moved to the 75th percentile of the 2018 Regional Market Rate Survey.

Note: We do not have any Family Child Care providers paid under the SRR in our county.

Sources: <https://www.cdss.ca.gov/Portals/9/Additional-Resources/Letters-and-Notices/CCBs/2021/CCB21-26.pdf?ver=2021-12-29-161332-570>

[https://cdss.ca.gov/Portals/9/CalWORKs/CCT/CCDD/2021-22ReimbursementFactSheet\\_111821\\_rj\\_as.pdf?ver=2021-11-18-163317-783](https://cdss.ca.gov/Portals/9/CalWORKs/CCT/CCDD/2021-22ReimbursementFactSheet_111821_rj_as.pdf?ver=2021-11-18-163317-783)

SMC Office of Education; Brion Economics, Inc.

**Table 3-3c** summarizes average market rates for FY 2020-2021 which are the latest data available from the California Resource & Referral Network. Center-based rates are presented first followed by FCCH

rates by age group. The average full-time Infant care rate is \$2,042 per month, and the part-time Infant rate is \$1,618 per month. For Preschool, the full-time monthly rate is \$1,652, and for part-time, the rate is \$1,076 per month. School Age cost is \$972 for full-time care and \$604 for part-time care at child care centers. FCCH rates are generally less than center-based rates, as shown, with the exception of School Age care, at \$1,013 for full-time care, and \$711 for part-time care. The rates for the 75<sup>th</sup> percentile are also included below.

**Table 3-3c - Section 1c**  
**Average Monthly Cost of Care by Age Group and Facility Type - FY 2020-2021**  
**San Mateo County Child Care Needs Assessment - 2022**

Age	Infants Under 2 Years	Preschool 2-4 Years	School-Age 5-12 Years
<b>Center-Based Care (1)</b>			
Center Full-Time Average Market Rate	\$2,042	\$1,652	\$972
Center Full-Time 75th Percentile Rate (2)	\$2,369	\$1,822	\$1,426
Center Part-Time Average Market Rate	\$1,618	\$1,076	\$604
Center Part-Time 75th Percentile Rate (2)	\$1,935	\$1,351	\$764
<b>Family Child Care Homes (1)</b>			
FCCH Full-Time Average Market Rate	\$1,561	\$1,444	\$1,013
FCCH Full-Time 75th Percentile Rate (2)	\$1,952	\$1,772	\$1,339
FCCH Part-Time Average Market Rate	\$1,043	\$933	\$711
FCCH Part-Time 75th Percentile Rate (2)	\$1,346	\$1,240	\$1,128

(1) From Regional Market Rates for Licensed Family Childcare Homes for FY 20-21 from the California Child Care Resource & Referral Network. <https://rrnetwork.org/research/child-care-data-tool#!0>

(2) The 75th percentile market rate is the price at or below which 75 percent of child care providers reported charging for services.

Sources: California Child Care Resource & Referral Network; San Mateo Office of Education; and Brion Economics, Inc.

## Section 1d and 1e – Subsidized Care

San Mateo County has a significant shortage of subsidized care, as do most counties in California. **Table 3-4** summarizes the subsidized space data by age group, full-time and part-time care, from CSPP and CCTR programs by City/Area in the County that was collected by the CPCC for this study. As shown, some Cities/Areas do not have any subsidized care available.

Table 3-4 - Section 1d and 1e

Subsidized Providers and Spaces by Age Group and City/Area - 2022 (1)

San Mateo County Child Care Needs Assessment - 2022

City	Subsidized Infant Spaces - 0 - 2 Years	Subsidized Preschool Full Day - 3 - 4 Years	Subsidized Preschool Part Day - 3 - 4 Years	Subsidized School Age Spaces - 5 - 12 Years	Total Subsidized Spaces, 0 - 12 Years	Percent Distribution
Atherton	-	-	-	-	-	0.0%
Belmont	-	4	-	-	4	0.1%
Brisbane	-	-	-	-	-	0.0%
Burlingame	10	9	-	-	19	0.3%
Daly City/Colma	31	204	136	791	1,162	19.7%
East Palo Alto	20	364	82	405	871	14.8%
Foster City	-	-	-	-	-	0.0%
Half Moon Bay Region	16	60	30	109	215	3.6%
Hillsborough	-	-	-	-	-	0.0%
Menlo Park	12	251	107	111	481	8.2%
Millbrae	1	10	2	78	91	1.5%
Pacifica	-	30	-	72	102	1.7%
Portola Valley	-	-	-	-	-	0.0%
Redwood City	20	209	276	744	1,249	21.2%
San Bruno	13	101	93	166	373	6.3%
San Carlos	-	-	-	-	-	0.0%
San Mateo	57	212	103	251	623	10.6%
South Coast (3)	-	17	-	92	109	1.8%
South San Francisco	31	254	84	225	594	10.1%
Woodside	-	-	-	-	-	0.0%
<b>Total</b>	<b>211</b>	<b>1,725</b>	<b>913</b>	<b>3,044</b>	<b>5,893</b>	<b>100.0%</b>
Percent Distribution	3.6%	29.3%	15.5%	51.7%	100.0%	

Note: Age Groupings for Subsidized Spaces is slightly different than the age groupings for the rest of the study.

(1) Data provided from survey of all providers offering subsidized care, by Sarah Kinahan, Child Care Coordinator, San Mateo County - Spring 2022.

Sources: Child Care Partnership Council; Brion Economics, Inc.

There are a total of 5,893 subsidized spaces associated with center-based, state-contracted Title 5 (CSPP and CCTR) programs as of the spring of 2022. Additional subsidized care is available as discussed further below. It should be noted that for subsidized care, the age groupings vary slightly from the overall age groupings used in this study, as follows:

- Infants equal birth through age 2, or up to 35 months
- Preschool equals 3 and 4-year-olds
- School Age equals 5 to 12-year-olds (no difference)

The data discussed in this section are organized according to these age group definitions to conform with the age eligibility criteria for the CSPP and CCTR programs.

Currently, there are 211 Infant subsidized spaces countywide from center-based, state-contracted Title 5 programs. For Preschool age children there are 1,725 full-time subsidized spaces and 913 part-time spaces from center-based, state-contracted Title 5 programs. For School Age care, which by definition is part-time, there are 3,044 spaces countywide from center-based, state-funded programs. Redwood City and Daly City/Colma each have about 20% of the total supply of subsidized spaces, followed by Menlo Park at about 15%, and then South San Francisco at about 10%. The City of San Mateo has about 11% of the total spaces countywide. **Table 3-4a** summarizes CalWORKs and Alternative Payment spaces by age group.

**Table 3-4a - Section 1d and 1e**  
**Estimate of Children in CalWORKs Stages 1, 2 and 3 and Receiving Alternative Payment Support**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Infants 0-2 Years	Preschool 3-4 Years	School-Age 5-12 Years	Total 0-12 Years
CalWORKs Stage 1 (1)	13	46	30	89
CalWORKs Stage 2 (2)	25	18	98	141
CalWORKs Stage 3 (3)	31	49	321	401
Alternative Payment (CAPP) (4)	129	144	301	574
<b>Total Children Served</b>	<b>198</b>	<b>257</b>	<b>750</b>	<b>1,205</b>
Percent Distribution	16%	21%	62%	100%

(1) Notes: Stage 1 Data is 0 up to 2, for Infants, 2to 5 year olds for Preschool and School Age is 6 to 12. Data as of July 2022.  
<https://www.cdss.ca.gov/inforesources/research-and-data/calworks-data-tables/cw-115>

(2) Number of children in CalWORKs Stage 2 programs, source: California Department of Education, CD-801A Monthly Report, October 2020, by location of family residence; note school age data is 2018.

(3) Number of children in CalWORKs Stage 3 programs, source: California Department of Education, CD-801A Monthly Report, October 2020, by location of family residence; note school age data is 2018.

(4) Number of children in Alternative Payment Programs (CAPP), source: California Department of Education, CD-801A Monthly Report, October 2020, by location of family residence; note school age data is 2018.

Sources: Early Learning Needs Assessment Tool/AIR - 2018 and 2020; CA Dept of Social Services; Brion Economics, Inc.

As shown in **Table 3-4b**, the need for subsidized care totals 33,023 spaces. This represents 30% of children overall based on countywide estimates using CELNAR data. In total, there are 7,098 subsidized child care spaces in the County from various programs and sources. There is an estimated shortage of 9,210 subsidized Infant spaces, 2,687 subsidized Preschool spaces, and 14,027 School Age subsidized

spaces, for a total shortage of almost 26,000 spaces countywide. Only 21.5% of the need for subsidized spaces is being met overall, for all age groups. This figure is less for Infants (4.3%) and much higher for preschoolers (52%). For School Age children, about 21% of need is currently met.

**Table 3-4b - Section 1d and Section 1e**  
**Unmet Need for Subsidized Care by Age Group**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Infants 0-2 Years	Preschool 3-4 Years	School-Age 5-12 Years	Total 0-12 Years
Estimated Children (1)	28,188	17,525	63,843	109,556
Need for Subsidized Spaces (2)	9,619	5,582	17,821	33,023
Percent of Total Children	34%	32%	28%	30%
Enrollment in Subsidized Care (3)	409	2,895	3,794	7,098
<b>Unmet Need</b>	<b>9,210</b>	<b>2,687</b>	<b>14,027</b>	<b>25,925</b>
Percent of Need Met for Subsidized Care	4.3%	51.9%	21.3%	21.5%

*Note: Age Groupings for Subsidized Spaces is slightly different than the age groupings for the rest of the study.*

(1) Note age groups are 0 through 2 years for Infants, and 3-4 years for Preschool; see Table 2-2, Chapter 2.

(2) Number of children living in households earning under 85% state median income (SMI) (five-year estimates, from

(3) See Tables 3-4 and 3-4a.

Sources: Child Care Partnership Council; Early Learning Needs Assessment Tool/AIR; Brion Economics, Inc.

**Table 3-4c** combines data from **Table 3-4** collected by the County in a provider survey in Spring 2022 with data from **Table 3-4a** on CalWORKs and Alternative Payment spaces. Note that the timeframe of the data is different. Preschool spaces from **Table 3-4** include full-time and part-time spaces. As shown, there is a total of 7,098 subsidized spaces in the County as a whole. Infant spaces total 409, Preschool spaces total 2,895, and School Age spaces total 3,764. Subsidized spaces represent 17% of the total supply of child care spaces for children 0 to 12 years old. About 14% of Infant spaces, 15% of Preschool spaces, and 19% of School Age spaces are currently subsidized.

## Section 2 – Local Population Data

See **Chapter 2** for estimates of the child population and child care demand using *ABAG Projections 2040*, which more accurately reflects population estimates than the data currently provided through CELNAR. As stated in **Chapter 2**, this Study uses population and age data from *ABAG Projections 2040* as the main demographic data source because it provides internally consistent data for 2022 and 2032 and includes an estimate of jobs by City/Area that can help determine demand from families commuting in for work from outside the County.

**Table 3-4c - Section 1d and 1e**  
**Total Subsidized Spaces by Age Group and Type Compared to Total Supply**  
**San Mateo County Child Care Needs Assessment - 2022**

Item	Infants 0-2 Years	Preschool 3-4 Years	School-Age 5-12 Years	Total 0-12 Years
State Preschool, General Child Care, ASES, Early Head Start, and Head Start	211	2,638	3,044	5,893
CalWORKs & AP	198	257	750	1,205
<b>Total Subsidized Supply</b>	<b>409</b>	<b>2,895</b>	<b>3,794</b>	<b>7,098</b>
<b>Total Child Care Supply of Spaces</b>	<b>2,925</b>	<b>18,836</b>	<b>19,682</b>	<b>41,443</b>
<b>Percent Subsidized</b>	<b>14%</b>	<b>15%</b>	<b>19%</b>	<b>17%</b>

*Note: Age Groupings for Subsidized Spaces is slightly different than the age groupings for the rest of the study.*

See Table 3-4 and 3-4a for more detail.

Sources: Child Care Partnership Council; Early Learning Needs Assessment Tool/AIR - 2018 and 2020; Brion Economics, Inc.

### Section 3 – Capacity at Child Care Centers and FCCHs

The current supply of licensed FCCHs and licensed and license-exempt centers in San Mateo County is shown in **Table 3-5**. There are 484 child care centers, including licensed and license-exempt centers, which serve a total of 35,677 children, ages 0 to 12 years old. Infants have the least number of spaces with only 1,591 or 4% of the total, and Preschool age spaces are at 45% of the total supply or 16,167 spaces. There are 17,919 School Age spaces or 50% of total center-based care spaces.

There are 525 Small and Large FCCHs in San Mateo County that provide a total of 5,766 spaces for children ages 0 to 12 years old. Of those, 1,334, or 23% are for Infants, 2,669 or 46% are for Preschool, and 1,763, or 31%, are for School Age, based on standard licensing requirements. The actual distribution of FCCH spaces may vary based on the preferences of FCCH owners regarding what age groups they want to serve. Combined Countywide, there are a total of 41,443 licensed or license-exempt child care spaces in the County. This includes 2,925 Infant spaces, 18,836 Preschool spaces, and 19,682 School Age spaces. There are a total of 1,009 child care providers countywide. **Chapter 2** provides more detail on the supply of child care spaces, providers by location, and estimates of planned supply.

Table 3-5 - Section 3

## Child Care Centers and Family Child Care Homes - No. of Providers and Spaces - 2022

## San Mateo County Child Care Council Needs Assessment 2022

Type of Care	No. of Providers	Infant Under 2 Years	Preschool 2-4 Years	School-Age 5-12 Years	Total 0-12 Years
<b>CENTER BASED CARE</b>					
Licensed Child Care Center Spaces (1)	484	1,591	16,167	17,919	35,677
Percent Distribution		4%	45%	50%	100%
<b>FAMILY CHILD CARE HOMES (FCCHs)</b>					
FCCHs (Small and Large) (2)					
Total FCCHs and FCCH Spaces by Age	525	1,334	2,669	1,763	5,766
Percent Distribution		23%	46%	31%	100%
<b>Total Supply in Spaces - All Types</b>	<b>1,009</b>	<b>2,925</b>	<b>18,836</b>	<b>19,682</b>	<b>41,443</b>
Percent Distribution		7%	45%	47%	100%

(1) Includes license-exempt spaces, including ASES programs.

(2) Includes all FCCHs as of May 2022.

For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces.

For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces.

For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Sources: 4Cs-Child Care Coordinating Council of San Mateo County; Child Care Partnership Council, and Community Care Licensing; and Brion Economics, Inc.

## Section 4 – Child Care Waitlists

As of July 2022, there are 2,103 children who have been determined to be subsidy-eligible and are waiting for an Alternative Payment (AP) voucher for child care. This includes 244 Infant vouchers, 1,061 Preschool vouchers, and 798 School Age vouchers (see **Table 3-6**). Currently, there is no centralized child care waitlist in the County or comprehensive waitlist data source in the County. The Workforce Survey prepared as part of this study included a question regarding whether child care programs had a waitlist. There were 101 respondents that answered this question and 41 reported positively that there were waitlists for:

- 19 Infants;
- 21 Toddlers;
- 23 Preschoolers;
- 5 School Age children; and
- 3 didn't know

**Table 3-6 - Section 4**  
**Eligible Children by Age Group Waiting for Alternative Payment Vouchers through 4Cs**  
**San Mateo County Child Care Needs Assessment - 2022**

Type of Care (1)	Total Children	Notes
Infant Care	244	0 - 1 year, 11 months
Preschool	1,061	2 - 5 years, 11 months
School Age	798	763 are between 6 - 12 years, 11 months. 35 include Special Needs children over 13.
Total on Waitlists	2,103	

(1) Data provided July 2022 by Program Manager- Family Eligibility 4Cs of San Mateo County; funding for these vouchers is through California Department of Social Services.

Sources: 4Cs-Child Care Coordinating Council of San Mateo County; and Brion Economics, Inc.

## Sections 5 and 6 – Language Spoken by Children

The number of kindergarteners who speak another language other than English in San Mateo County as of 2020-2021 is summarized in **Table 3-7**. Data on language spoken is from the California Department of Education’s Data Quest database ([www.cde.ca.gov](http://www.cde.ca.gov)). There are a total of 1,958 kindergarteners reported for the school years 2020-2022. This data set is not available for children ages 0 to 5 years old, but it is assumed that children in grade K may be reflective of the language spoken by households with younger children in the County. Spanish makes up the greatest percentage (65.5%) of the primary language spoken (not including English), followed by Cantonese and Mandarin, with 5.5% and 6.4%, respectively. Japanese speakers make up 3% of children, followed by Filipino and Russian, each at 2.6%. Other languages make up the remainder of the languages spoken.

**Table 3-7 - Section 5 and 6**  
**Children In Kindergarten by Language Spoken (Excluding English) as of 2021-2022**  
**San Mateo County Child Care Council Needs Assessment 2022**

Language	Number of Kindergarteners Countywide	Percent Distribution
Spanish	1,283	65.5%
Filipino	51	2.6%
Cantonese	108	5.5%
Mandarin	126	6.4%
Arabic	47	2.4%
Portuguese	47	2.4%
Japanese	59	3.0%
Russian	50	2.6%
Other non English	19	1.0%
Tongan	7	0.4%
Hindi	27	1.4%
Burmese	11	0.6%
Korean	21	1.1%
Vietnamese	13	0.7%
Turkish	13	0.7%
French	12	0.6%
Hebrew	6	0.3%
Farsi	6	0.3%
German	10	0.5%
All Other	42	2.1%
<b>Total Children</b>	<b>1,958</b>	<b>100.0%</b>

Sources: California Department of Education DataQuest Report for 2020-21 for San Mateo County;  
 Brion Economics, Inc.

## Section 7 – Children with Special Educational Needs

The number of children 0 to 5 years old with an Individual Family Service Plan (IFSP) or Individualized Education Plan (IEP) is broken down by age group in **Table 3-8**. IFSPs are for families with children younger than 3 years and IEPs are for children ages 3 and older. Data regarding children with special needs come from the San Mateo County Office of Education and the San Diego Information System (SANDIS). There are 671 Infants with IFSPs and 506 preschoolers with IEPs. These figures represent a small (2.6%) percentage of Infants and Preschool age children in the County.

**Table 3-8 - Section 7**  
**Children 0 to 5 with an IFSP or IEP by Age Group as of 2022**  
**San Mateo County Child Care Needs Assessment - 2022**

Age	Infants Under 3 Years	Preschool 3 Years to 60 Months	Totals
Individualized Family Service Plan (IFSP) (1)	671	na	671
Individualized Education Plan (IEP) (2)	na	506	506
<b>Total (IFSP or IEP) (1,2)</b>	<b>671</b>	<b>506</b>	<b>1,177</b>

(1) Children under 3 years old have Individual Family Services Plans (IFSPs); data is as of October 2021.

(2) Children 3 years old and up have Individual Education Plans (IEPs); data is as of Fall 2021.

Sources: SMCOE CALPADS; San Diego Information System (SANDIS) ; Brion Economics, Inc.

## Section 8 – Children in Child Protective Services and Foster Care

**Table 3-9** provides information on the number of children in foster care as of October 2019, 2020, and 2021 for San Mateo County. Data for some of the items are suppressed due to the small figures in those categories of care or status. As of late 2021, there were about 144 children 0 to 17 years old in foster care in the County. This figure has gone down by 70 children since 2020 when it was 214, representing a 33% reduction. In 2019, there were a total of 234 children 0 to 17 years old in Foster Care. These data are from the San Mateo County California Department of Social Services, as reported by the California Child Welfare Indicators Project (CCWIP) at UC Berkeley. It is not clear what has caused the reductions, but it could be related to the results of the COVID-19 pandemic.

**Table 3-9 - Section 8**  
**Children in Foster Care - 2019 through 2021**  
**San Mateo County Child Care Needs Assessment - 2022**

Age Group	Point In Time		
	Oct 1, 2019	Oct 1, 2020	Oct 1, 2021
Under 1	11	11	M
1-2	17	16	M
3-5	16	17	M
6-10	35	31	16
11-15	46	38	27
16-17	36	29	24
18-21	73	72	77
Missing	0	0	0
<b>Total</b>	<b>234</b>	<b>214</b>	<b>144</b>
<b>Net Change</b>		<b>(20)</b>	<b>(70)</b>
<b>Percent Change</b>		<b>-9%</b>	<b>-33%</b>

*"M" is "Masked" for values of 10 or less. These numbers are not included in the total.*

Data Source: CWS/CMS 2021 Quarter 4 Extract.

Program version: 2.00 Database version: 74DA965E

Please consult the methodology for detailed placement type definitions.

Sources: California Child Welfare Indicators Project (CCWIP), University of California at Berkeley, California Department of Social Services, Research and Data Insights Branch; Brion Economics, Inc.

**Table 3-9a** summarizes children in foster care by type of status or referral as of 2020 and 2021, the latest data available. Data for some of the items are suppressed due to the small figures in those categories of care or status. Data for 2019 is not available. Again, the number of children in foster care has been decreasing recently, as shown.

**Table 3-9a - Section 8**  
**Children in Foster Care by Type of Placement - 2020 and 2021**  
**San Mateo County Child Care Needs Assessment - 2022**

Placement Type	Point In Time		
	Jan 1, 2020	Oct 1, 2020	Oct 1, 2021
Pre-Adopt	M	M	M
Relative/NREFM	40	48	32
Foster	37	27	17
FFA	40	40	18
Court Specified Home	0	0	0
Group	14	M	M
Shelter	M	0	0
Non-FC	M	M	M
Guardian - Dependent	0	0	0
Guardian - Non-Dependent	18	17	16
Runaway	M	M	0
Trial Home Visit	0	0	M
SILP	50	56	56
Transitional Housing	11	M	M
Other	M	M	M
Missing	0	0	0
<b>Total</b>	<b>230</b>	<b>214</b>	<b>166</b>
<b>Net Change</b>		<b>(16)</b>	<b>(48)</b>
<b>Percent Change</b>		<b>-7%</b>	<b>-22%</b>

"M" is "Masked" for values of 10 or less.

Data Source: CWS/CMS 2021 Quarter 4 Extract; Program version: 2.00 Database version: 74DA965E

Please consult the methodology for detailed placement type definitions.

Sources: California Child Welfare Indicators Project (CCWIP), University of California at Berkeley, California Department of Social Services, Research and Data Insights Branch; Brion Economics, Inc.

**Table 3-9b** summarizes the number of children by age group in Child Protection Services with reports of maltreatment allegations for the year ending March 2022. In the most recent year from April 2021 to March 2022, 4,610 reports were made regarding children ages 0 to 17. In the prior year from April 2020 to March 2021, there were 3,700 allegations regarding children ages 0 to 17. This represents a 25% increase over 2020-2021 figures.

**Table 3-9b - Section 8**  
**Child Population with Child Maltreatment Allegations - 2021 and 2022**  
**San Mateo County Child Care Needs Assessment - 2022**

Age Group	Time Period	
	Apr 2020-Mar 2021	Apr 2021-Mar 2022
Under 1	148	169
1-2	252	298
3-5	497	638
6-10	1,098	1,343
11-15	1,226	1,560
16-17	479	602
<b>Total</b>	<b>3,700</b>	<b>4,610</b>
<b>Net Change</b>		<b>910</b>

Report counts each child receiving child maltreatment allegations once for each analysis year.

Data Source: CWS/CMS 2022 Quarter 1 Extract.

Program version: 2013.12.05 Database version: 7554C759

CCWIP reports. Retrieved Jul 16, 2022, from University of California at Berkeley California Child Welfare Indicators Project website.

URL: <https://ccwip.berkeley.edu>

Sources: UCB; Brion Economics, Inc.

## Section 9 – Children with Working Parents

The number of children with working parents who require child care is calculated in **Table 3-10**. By applying labor force participation rates (LFPRs) to the total number of children, the number of children with working parents is determined. LFPRs are available for families with children under six years old and children six and over. For children under six years old in San Mateo County, the LFPR is 71.2%. For children six and over, the LFPR is 75.4%. Currently, there are 12,898 Infants with working parents (two parents, and single parents), 19,636 Preschoolers, and 48,138 School Age children, for a total of 89,672, or 73.6% overall. While many Needs Assessments use labor force participation rates, this study uses the results of the 2022 Parent Survey to estimate the need for child care by age group.

**Table 3-10 - Section 9**  
**Estimated Number of Children in Families Where All Parents/Guardians Work**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Infants Under 2 Years	Preschool 2-4 Years	School Age 5-12 Years	Total 0-12 Years Old
Number of Children by Age Group (1)	18,127	27,596	63,843	109,566
Labor Force Participation Rates (2)	71.2%	71.2%	75.4%	73.6%
Children With Working Parents	12,898	19,636	48,138	80,672

(1) Population by age is based on AIR Data by Zip Code 5-year estimate for 2018 sorted by city, and adjusted by ABAG population growth estimates to 2022.

(2) Labor force participation rates are from the 5-Year American Community Survey 2020 and include children with two working parents or a single working parent.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

## Section 10 – Public Assistance

A variety of data on children receiving public assistance has been collected. Most of this data is not available for children 0 to 5 years old. The data were collected from public agency websites as noted.

- **Public Assistance:** About 10% of the population under 18 are in households in the County that receive Living Supplemental Security Income (SSI), cash public assistance income, or Food Stamps/SNAP in the past 12 months. This assumes a total of 156,335 households.<sup>19</sup>
- **CalFresh:** In 2020, there were 11,207 children ages 0 to 17 years old receiving support through CalFresh.<sup>20</sup> **Exhibit 3-1** summarizes the number of households receiving CalFresh support from 2016 to 2020.<sup>21</sup> The number of households has increased from 15,148 in 2016 to 17,322 as of 2021, or a 14% increase overall.

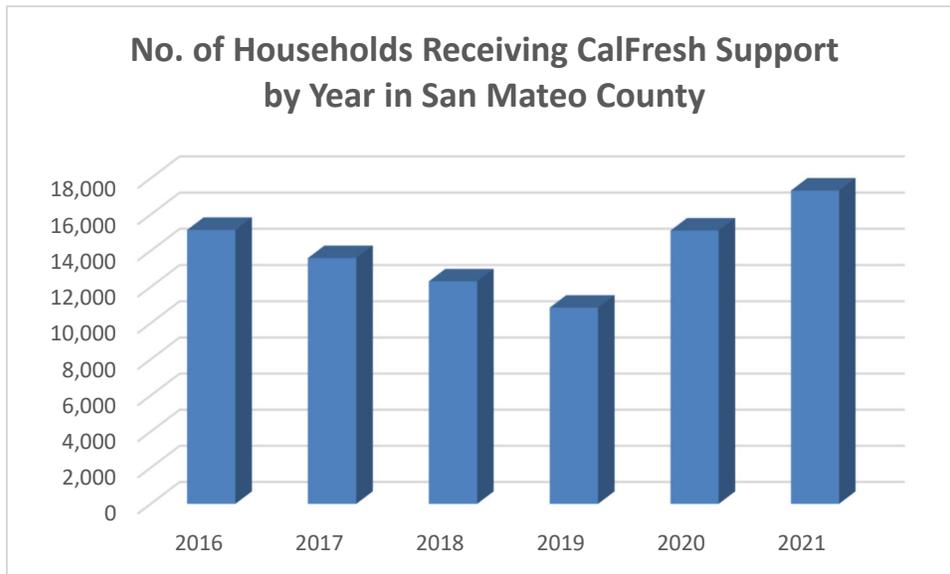
<sup>19</sup> Receipt of supplemental security income (SSI), cash public assistance income, or food stamps/snap in the past 12 months by household type for children under 18 years in households.

<https://api.census.gov/data/2020/acs/acs5>

<sup>20</sup> Data Source: As cited on kidsdata.org, California Dept. of Social Services, CalFresh Data Dashboard (Aug. 2021).

<sup>21</sup> <https://public.tableau.com/app/profile/california.department.of.social.services/viz/CFdashboard-PUBLIC/Home?publish=yes>

**Exhibit 3-1**



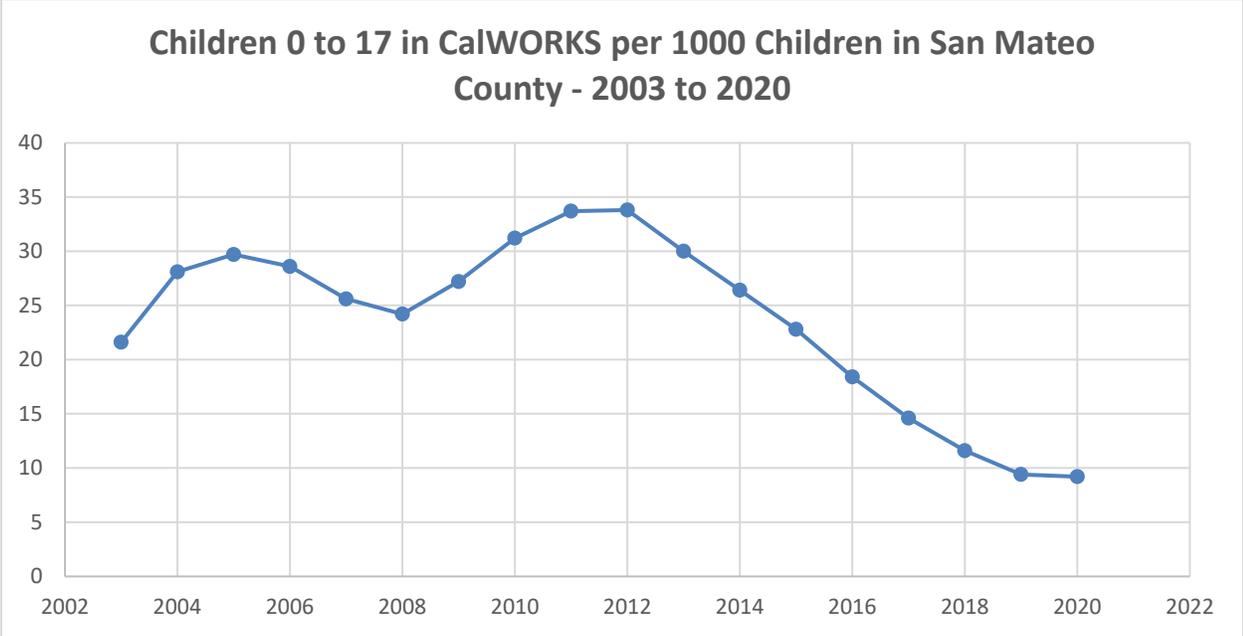
- **Food Insecurity:** In 2019, 5.9% of children 0 to 17 years old were living in households characterized as food insecure or households unable to provide adequate food for all household members for the entire year due to insufficient resources (e.g., in 2019, 13.6% of California children lived in food insecure households).<sup>22</sup>
- **CalWORKs:** As of July 2022, there were 89 children 0 to 12 participating in CalWORKs Stage 1; 141 children 0 to 12 in CalWORKs Stage 2, and 401 children 0 to 12, in Stage 3, for a total of 631 children participating CalWORKs.<sup>23</sup> In 2020, there were 9.2 per 1,000 children 0 to 17 years old in CalWORKs.<sup>24</sup> This is defined as the number of children receiving at least \$10 of CalWORKs cash aid in the month of January, per 1,000 children ages 0-17 (e.g., in January 2020, 80 per 1,000 California children participated in CalWORKs). **Exhibit 3-2** summarizes this data over time and as shown, the number of children 0 to 17 years old in CalWORKs has declined overall since 2003 from 21.6 per 1,000, to 9.2 per 1,000, a 57% decrease.

<sup>22</sup> Data Source: As cited on kidsdata.org, Feeding America, Map the Meal Gap (Jul. 2021).

<sup>23</sup> Note: Stage 2 and 3 data is from 2020 for Infants and Preschool age children, and 2018 for School Age children.

<sup>24</sup> Data Source: As cited on kidsdata.org, California Dept. of Social Services, CalWORKs Cash Grant Caseload Movement Report; California Dept. of Finance, Population Estimates and Projections (May 2020).

**Exhibit 3-2**



**Section 11 – Children by Family Income and Age**

**Table 3-11** calculates the number of children in families by income category and age group. Based on the American Community Survey 5-Year Estimates (2020) and compiled using the Early Learning Needs Assessment Tool by the American Institutes for Research (AIR), the percentage of families with incomes below the federal poverty level for Infants is 8.2%. For Preschool age children, it is 7.1%, and for School Age children it is 8.8%. This totals 8.3% overall, for children ages 0 to 12. Countywide, 9,084 children 12 and under live in families that earn less than the federal poverty level, which was \$27,750 for a family of four in 2022. This is a decrease from the 2017 Needs Assessment when 11,016 children ages 0 to 12 were estimated to live in households making less than the FPL.

The median income for a family of four in San Mateo County for 2020 is \$181,372. Using the Early Learning Needs Assessment Tool, created for the California Child Care Coordinators Association by the American Institutes for Research (AIR), data on the number of children in each age group with family incomes that are below 85% of State Median Income (SMI) is calculated. 85% of SMI is the current income cutoff for many of the state’s subsidized child care programs. The AIR data shows that 20.6% of children aged under 2, 28% of children ages 2 to 4, and 26.1% of children 5 to 12 years old live in families earning less than 85% of SMI. Overall, 28,279 (25.8%) children 12 years old and under in San Mateo County live in families that earn below 85% of SMI. About 74% or 81,287 of children 0 to 12 live in families that have incomes over 85% of the SMI.

**Table 3-11 - Section 11**  
**Number of Children in Families by Income Category and Age Group**  
**San Mateo County Child Care Council Needs Assessment 2022**

Age	Infant Under 2 Years	Preschool 2-4 Years	School-Age 5-12 Years	Total 0-12 Years
Total Children by Age Group - 2022	18,127	27,596	63,843	109,566
% of Children Living in Families Earning Less Than the Federal Poverty Level (1)	8.2%	7.1%	8.8%	8.3%
<b>No. of Children Living in Families Earning Less than the Federal Poverty Level</b>	<b>1,484</b>	<b>1,968</b>	<b>5,588</b>	<b>9,084</b>
<b>Median Family Income for a Family of Four in San Mateo County (2)</b>				<b>\$181,372</b>
% of Children in Families earning less than 85% of State Median Income (1)	20.6%	28.0%	26.1%	25.8%
<b>No. of Children in Families Earning less than 85% of State Median Income</b>	<b>3,729</b>	<b>7,730</b>	<b>16,677</b>	<b>28,279</b>
<b>Children in Families with Incomes Above 85% SMI</b>	<b>14,398</b>	<b>19,866</b>	<b>47,166</b>	<b>81,287</b>
Percent of Children in Families with Incomes Above 85% SMI	79%	72%	74%	74%

(1) This data is from the Early Learning Needs Assessment Tool compiled by American Institutes for Research. The percentages used here are based on numbers from the American Community Survey, according to the American Institutes for Research (2020).

(2) Median income from American Community Survey 5-Year Estimates 2020.

Sources: American Community Survey 5-Year Estimates 2020; American Institutes for Research; Brion Economics, Inc.

**Table 3-12** summarizes household income data by a variety of measures including household size, composition, age, ethnicity, gender, etc. As can be expected, there is a wide range of household income variation in the County based on these demographic factors. For instance, single, female-headed households make on average about \$60,000 per year, while a married couple with children makes about \$199,000 per year. White households average about \$135,000 per year while Black households average about \$80,000 per year. The disparity in household incomes by various household types directly impacts the children of these households and their ability to receive the early care and education they need.

**Table 3-12 - Section 11**  
**Median Household Income by Household Type and Number - 2020**  
**San Mateo County Child Care Study - 2022**

Household Type	Number	Percent	Median income
<b>HOUSEHOLD INCOME BY RACE AND HISPANIC OR LATINO ORIGIN OF HOUSEHOLDER</b>			
Households	263,351		\$128,091
<b>One race--</b>			
White	148,220	56.3%	\$134,732
Black or African American	6,407	2.4%	\$80,529
American Indian and Alaska Native	1,165	0.4%	\$96,458
Asian	72,792	27.6%	\$144,177
Native Hawaiian and Other Pacific Islander	2,048	0.8%	\$96,731
Some other race	19,963	7.6%	\$76,759
<b>Two or more races</b>			
Hispanic or Latino origin (of any race)	47,309	18.0%	\$81,839
White alone, not Hispanic or Latino	126,908	48.2%	\$145,836
<b>HOUSEHOLD INCOME BY AGE OF HOUSEHOLDER</b>			
15 to 24 years	4,959	1.9%	\$72,325
25 to 44 years	86,158	32.7%	\$152,011
45 to 64 years	103,271	39.2%	\$148,720
65 years and over	68,963	26.2%	\$84,276
<b>FAMILIES</b>			
Families	184,019	na	\$148,138
With own children of householder under 18 years	76,200	41.4%	\$168,996
With no own children of householder under 18 years	107,819	58.6%	\$135,768
<b>Married-couple families</b>			
With own children under 18 years	62,103	33.7%	\$199,549
<b>Female householder, no spouse present</b>			
With own children under 18 years	9,940	5.4%	\$59,747
<b>Male householder, no spouse present</b>			
With own children under 18 years	4,157	2.3%	\$89,872
<b>FAMILY INCOME BY FAMILY SIZE</b>			
2-person families	75,018	40.8%	\$124,793
3-person families	45,565	24.8%	\$155,282
4-person families	39,675	21.6%	\$181,372
5-person families	15,399	8.4%	\$154,255
6-person families	4,868	2.6%	\$146,964
7-or-more person families	3,494	1.9%	\$166,856
<b>FAMILY INCOME BY NUMBER OF EARNERS</b>			
No earners	17,647	9.6%	\$66,210
1 earner	50,238	27.3%	\$109,272
2 earners	87,291	47.4%	\$185,187
3 or more earners	28,843	15.7%	\$170,150
<b>NONFAMILY HOUSEHOLDS</b>			
Nonfamily households	79,332	79,332	\$81,478
<b>Female householder</b>			
Living alone	33,087	41.7%	\$56,575
Not living alone	9,589	12.1%	\$130,732
<b>Male householder</b>			
Living alone	25,471	32.1%	\$77,073
Not living alone	11,185	14.1%	\$148,646

Note that income is inflation adjusted.

Data is from

<https://data.census.gov/cedsci/table?q=median%20family%20income&g=0500000US06081&tid=ACSST5Y2020.S1903>

Sources: US Census; Brion Economics, Inc.

## Section 12 – Migrant Children

Currently, there are a total of 260 children ages 0 to 12 years old in the Migrant Education Program in the County (see **Table 3-13**). This includes four Infants (1.5%), 35 Preschool children (13.5%), and 221 School Age children, or 85% of the total. These data are as of 2022 and were provided by the San Mateo County Office of Education. This is 66% lower than in the 2017 needs assessment when 761 children were participating in the Migrant Education Program.

**Table 3-13 - Section 12**  
**Number of Children Enrolled in Migrant Education - 2022**  
**San Mateo County Child Care Needs Assessment - 2022**

Item	Infant Under 2 Years	Preschool 2-4 Years	School Age 5-12 Years	Total 0-12 Years
Children in Migrant Worker Families (1)	4	35	221	260
Percent Distribution	1.5%	13.5%	85.0%	100%

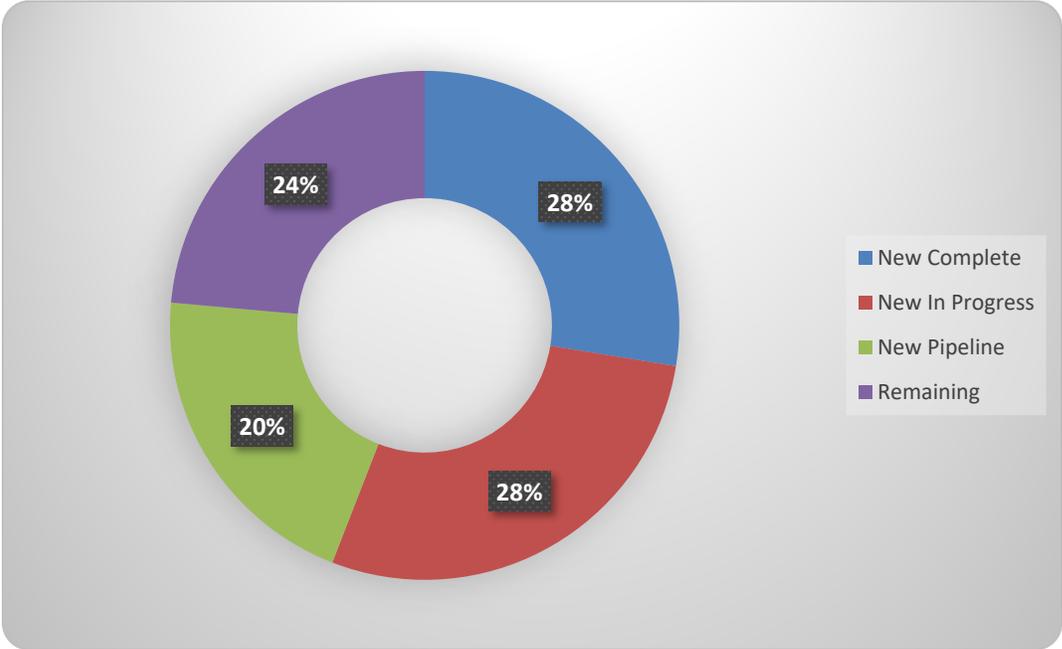
(1) Data on migrant children provided by Simi Pannu, San Mateo County Office of Education. Data is for the 2021-22 school year.

Sources: San Mateo County Office of Education; Brion Economics, Inc.

## Section 13 – New Child Care Facilities

When San Mateo County was forced to return approximately \$1 million in state preschool funding due to a lack of space for programs in 2016, local ECE leaders commissioned a task force and survey which identified “lack of funding” and “difficulty finding an available site” as the top two barriers child care and Preschool providers face when exploring program development or expansion. Their recommendations laid the groundwork for Build Up San Mateo. Build Up San Mateo has identified an overall goal of 3,000 new child care spaces countywide over the next several years. As of 2022, there are 2,293 of those spaces, or 76% of the total goal, in some form of the planning and development process as shown in **Exhibit 3-3**. **Table 3-14** summarizes the spaces by status and location.

**Exhibit 3-3: Distribution of Build Up San Mateo Planned Spaces by Status**



Build Up San Mateo - Key Advocacy Messages<sup>25</sup>

1. San Mateo County has a tremendous shortage of early learning facilities for all ages and income levels that impact families, children, and the County’s economic prosperity.
2. Build Up SMC seeks to alleviate the child care shortage through a four-part approach, informed by the recommendations of the Silicon Valley Community Foundation’s cross-sector Task Force: reuse of existing available space, the inclusion of child care in new developments, partnerships with large employers, and generating new capital funds.
3. Build Up staff and partners and volunteers work with cities, developers, employers, school districts, and FBOs on solutions for including child care.
4. Child care is a solution to workforce issues such as work-life balance, absenteeism, employee retention, and productivity.
5. Having high-quality child care, Preschool, and after-school care available makes a community more friendly and sustainable and improves the quality of life for people who live and work in the community.

<sup>25</sup> From <https://buildupsmc.com/advocate/>, as viewed on July 15, 2022.

6. Child care availability is an important piece of community infrastructure that is interrelated with housing and transit because child care sited near housing, jobs, and transit reduces traffic congestion and commute times, allows families to live and work in the same community, and complements a city’s business development and retention strategies.

**Table 3-14 - Section 13**  
**Build Up San Mateo-Supported Infant and Preschool Facilities - Project Status**  
**San Mateo County Child Care Needs Assessment - 2022**

City/Area	Status			Total Spaces
	Completed	In Progress	Pipeline	
Belmont	60	-	-	60
Burlingame	-	-	114	114
Daly City	30	77	30	137
East Palo Alto	16		6	22
Foster City	6	-	-	6
Half Moon Bay	-	18	-	18
Menlo Park	116	24	-	140
North Fair Oaks	-	-	18	18
Pacifica	-	-	40	40
Pescadero	-	12	-	12
Portola Valley	-	-	-	-
Redwood City	346	368	144	858
San Bruno	12	-	30	42
San Carlos	72	-	-	72
San Mateo	169	171	108	448
South San Francisco		180	126	306
<b>Totals</b>	<b>827</b>	<b>850</b>	<b>616</b>	<b>2,293</b>
Total Build Up Goal				3,000
Percent of Goal Met				76%

*Note: 1,062 of these spaces are counted in the Future Supply in the Supply and Demand Analysis in Chapter 2.*

Sources: Build Up San Mateo County; Brion Economics. Inc.

Build Up San Mateo served as a model for a new Build Up California effort which is statewide and provides key advocacy efforts throughout the state. The Low Income Investment Fund (LIIF) is administering Build Up California.

The County’s Child Care Partnership Council is also active in developing plans and supporting cities in the County with information and policy ideas to promote and develop new child care facilities. The

CCPC and Build Up San Mateo recently sent letters to each city outlining how they can address child care needs through their Housing Element General Plan updates and provide a whole range of policy and action-oriented ideas.<sup>26</sup>

As part of this Needs Assessment, city or community-level profiles of child care supply and demand will be prepared and shared with each city in the County.

## Sections 14 and 18 – Nontraditional Hours and Requests for Care

**Table 3-15** summarizes data from the 4Cs in regard to requests for care including requests for non-traditional hours care. These data are reported for the last three fiscal years and calculate the change from 2020 to 2022. Notes that requests for full-time, part-time, and non-traditional hours are not available by age of children. All requests decreased significantly in 2020-2021, most likely due to the COVID-19 pandemic. Highlights from this data include:

- Total requests for care have gone down from 2,157 in 2019-2020 to 1,461 in 2021-2022, or by 32%. Requests in 2020-2021 went down to 876 but increased again the following year.
- Requests for “other child care information” went up by 284% in the time frame from 620 to 2,378.
- Requests for Infant care were 829 in 2021-2022, a decrease of 38% over the last two years.
- Requests for Preschool care went down by 219 or 25% and totaled 657 in 2021-2022.
- Employment reasons are the most cited reason for requests, totaling 1,131 in the most recent time period, but this is 34% less than in 2019-2020. Looking for work was the next largest reason reported.
- Requests were for either center-based licensed care or licensed family child care homes.
- This year, there were 134 requests for before or aftercare and 40 requests for summer care.
- There were 186 requests for non-traditional hours care including evening, overnight, weekends, rotating, and drop-in care in 2021-2022. This is about 27% higher since 2019-2020.

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<sup>26</sup> <https://www.smcoe.org/about/child-care-partnership-council/>

Table 3-15 - Section 14

## Number of Requests for Care/Referrals by Type from 2020 to 2022

## San Mateo County Child Care Council Needs Assessment 2022

Type of Referral/Request for Care	Number of Requests by Year			Net Change	
	2019-2020	2020-2021	2021-2022	2020 to 2022	Percent
Total requests for child care referrals	2,157	876	1,461	(696)	-32%
Requests for child care referrals - Referral Counselor	543	205	286	(257)	-47%
Requests for child care referrals - Search Widget	1,614	671	1,175	(439)	-27%
Requests for other child care information	620	944	2,378	1,758	284%
<b>Age Category</b>					
Infants (under 2 years old)	1,339	397	829	(510)	-38%
Preschool (2 years through 5 years, 11 months)	876	487	657	(219)	-25%
School Age (6 years and older)	242	127	195	(47)	-19%
<b>Total</b>	<b>2,457</b>	<b>1,011</b>	<b>1,681</b>	<b>(776)</b>	<b>-32%</b>
<b>Time Category</b>					
Full time child care (35 hours or more per week)	2,126	827	1,382	(744)	-35%
Part time child care (less than 35 hours per week)	785	372	599	(186)	-24%
<b>Total</b>	<b>2,911</b>	<b>1,199</b>	<b>1,981</b>	<b>(930)</b>	<b>-32%</b>
<b>Reason</b>					
Employed	1,720	638	1,131	(589)	-34%
Looking for Work	305	170	225	(80)	-26%
In school/training	17	16	7	(10)	-59%
Other parental needs	133	57	103	(30)	-23%
Child Protective Services	50	18	58	8	16%
Back-Up care	97	29	87	(10)	-10%
Mildly Ill	-	-	-	-	na
Enrichment	96	57	126	30	31%
<b>Total</b>	<b>2,418</b>	<b>985</b>	<b>1,737</b>	<b>(681)</b>	<b>-28%</b>
<b>Type of Care</b>					
Licensed child care centers	255	255	255	-	0%
Licensed family child care homes	453	453	453	-	0%
License-exempt child care centers	-	-	-	-	na
License-exempt providers (optional)	-	-	-	-	na
<b>Schedule of Care</b>					
Before and/or After school child care	181	35	134	(47)	-26%
Summer only child care	27	30	40	13	48%
Other Child Care (Evening, Overnight, Weekends, Rotating, Drop-in)	147	90	186	39	27%
<b>Total</b>	<b>355</b>	<b>155</b>	<b>360</b>	<b>5</b>	<b>1%</b>

Sources: 4Cs of San Mateo County; Brion Economics, Inc.

## Section 15 – Quality Counts California and ELC Workforce

### About Quality Counts San Mateo

Currently, 93 sites participate in the voluntary Quality Counts San Mateo (QCSM). This represents 9.2% of the total 1,009 child care providers in San Mateo County. Programs in QCSM include publicly funded non-profits, school district programs, private non-profit and private proprietary programs, city programs, family child care home providers, legally license-exempt centers, and family/friend/neighbor (FFN) providers. This includes nearly 100% of the Title 5 programs (CCSP – California State Preschool subsidized care and CCTR – California General Child Care – subsidized care). Teachers from programs that participate in Quality Counts are eligible for the San Mateo County Office of Education’s (SMCOE) ECE Teacher Stipend program, which provides stipends to approximately 250 ECE staff each year for completing higher education units or professional development.

QCSM aligns workforce development objectives with Quality Counts objectives in the following ways:

- Aligning and increasing partnerships with key community partners, particularly the San Mateo County Community College District, to leverage workforce development supports. Quality Counts San Mateo (QCSM) providers will have priority in participating in the SMCOE ECE Teacher Stipend Program. The goal is to support QCSM providers to advance at Element 3 (Teacher Qualifications) of the Hybrid Matrix by applying for the first time or renewing a child development permit and/or working towards degree attainment.
- Targeting professionals working in programs that serve a substantial number of low-income children either through direct contracts or Alternative Payment Program vouchers.
- Using stipends to incentivize professional development that supports family engagement, Pre-3 alignment (math and literacy curriculum), Inclusion, Dual Language Learners, and trauma-informed care.
- Stipends are provided to reward completion of professional development that increases skills and competencies related to providing culturally and linguistically responsive high-quality interactions with young children.
- The SMCOE ECE Teacher Stipend Program also outreaches to Family, Friends, and Neighbors to make them aware of the Health and Safety training and 4Cs’ licensing support, and to make them aware of the Quality Improvement supports offered through QCSM.
- Stipends are offered for professionals who meet a specific educational milestone: complete a degree in ECE, obtain a Permit, or upgrade their Permit level.

Locally, QCSM, SMCOE, and the Child Care Partnership Council have also been developing an Inclusion Specialization badge to complement the QRIS matrix to help programs understand and adopt inclusive

practices across the seven elements of quality rating and improvement. The Inclusion Specialization matrix will allow programs to develop site-based quality improvement plans and for staff to develop professional growth plans that enhance inclusive practices.

## Countywide Workforce and Workforce Needs

Estimates of the ECE workforce in the County are provided in **Chapter 4**, along with an in-depth analysis of workforce needs, compensation, living wage needs, and education costs and challenges.

## Section 16 – Parent Needs and Survey

As part of this Needs Assessment, a countywide survey of parents was conducted in Fall of 2022. The survey was conducted by the Center for Learning Analytics at the San Mateo County Office of Education by staff Jeremy Del Carpio and Yung-Hui Chien. The survey was conducted in Qualtrics, an online survey system, and offered in English, Spanish and Traditional Chinese. The parent survey included 37 questions. The detailed results of the questions are included in **Appendix F**. Survey cross-tabulations of the child care preference questions are included in **Appendix G**, and copies of the survey questionnaire in English, Spanish and Traditional Chinese are provided in **Appendix H**.

## San Mateo County Parent Child Care Needs Survey Methodology & Limitations

In September 2022, the San Mateo County Office of Education’s Center for Learning Analytics, and the Child Care Partnership Council (CCPC) conducted an online survey of families living and/or working in San Mateo County. The online survey was open between September 7 and 16, 2022. The survey received 1,160 responses from parents or guardians who make child care decisions for their families. This represented 2,018 children ages 0 to 12. The survey asked 37 questions about the current and preferred use of child care for children ages 0 to 12 years old, and about other factors that impact child care use. The survey was offered in English, Spanish, and Traditional Chinese. A total of 870 responses were received in English, 274 in Spanish, and 16 in Chinese. Survey respondents had the option to be entered into a drawing for one of four \$50 gift cards that were distributed after the survey closed.

Survey outreach was conducted through two mechanisms in English, Spanish and Chinese. First, families in The Big Lift database (6,790 valid, unique emails) received a direct link to the survey. The Big Lift is a Preschool-to-Third-Grade initiative in San Mateo County; families in the database have received either Preschool or summer learning services through The Big Lift in seven school districts in San Mateo County over the past several years. Second, a link to the survey was created that could be shared through email and social media. The CCPC emailed the link to its listserv of 167 contacts, asking them to pass the survey link along to families in their networks, posted it on the CCPC’s Facebook page, and emailed it to all of the program directors for Title 5 and Quality Counts programs (approx. 100 contacts). Key community partners, such as First 5 San Mateo County, 4Cs, and Izzi Early Education,

shared the survey link with their parent email lists and on social media. A total of 769 responses were received through direct email and 391 through the general link.

The survey received more than its target of 1,000 responses, however, the population of survey respondents may have some limitations. First, infants and toddlers (children under age 2) represented only 8% of the 2,108 children ages 0 to 12. This is likely because The Big Lift programs start serving children at age three and most of the survey responses were received through this outreach strategy. Consequently, the child care preferences of families with infants and toddlers may be underrepresented in the survey. Second, 50% of survey respondents identified as Latinx/Hispanic which is higher than the countywide average where 33% of children ages 0 to 12 are Latinx/Hispanic. 79% of survey respondents had household incomes below \$150,000 which is below the County median income of \$181,400 for a family of four. Families who identify as Latinx/Hispanic and with low to moderate incomes are likely overrepresented in the survey responses again because of the outreach through The Big Lift which has income eligibility restrictions for its services and tends to operate in school districts with higher percentages of multi-lingual learners, as well as the outreach done through providers of subsidized child care. Despite these limitations, the survey responses provide robust, new insights into overarching child care trends and needs for working families in San Mateo County.

A total of 1,160 respondents participated in the survey and all of them make child care decisions in their households. Respondents have a total of 2,200 children ages 0 to 13-plus years old. This survey asked questions about the age of children, why parents use child care, what their current use of child care is by type and age, and their preferred use of care by type and age. It included questions on how parents find child care, why they use child care and when, and other demographic information. The most striking result of the survey is that **a total of 73% responded that they have had to turn down work due to lack of child care** (see **Table 3-16**). The connections between child care and parents' ability to work are key to a functioning economy. About 50% of respondents said their household members work different shifts to address child care needs.

The distribution of respondents' place of residence and place of work in the County is shown below in **Table 3-17**.

**Table 3-16**  
**Lack of Child Care and Work by Region**  
**San Mateo County Child Care Needs Assessment - 2022**

Have you ever had to turn down work due to a lack of child care?	North	Central	South	Coast	Other	Total
Yes	74%	63%	77%	80%	71%	<b>73%</b>
No	22%	36%	19%	19%	29%	<b>24%</b>
Prefer not to answer	4%	1%	3%	1%	0%	<b>3%</b>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Sources: Center for Learning Analytics at the San Mateo County Office of Education; Brion Economics, Inc.

**Table 3-17**  
**Zip Code Region of Parent Survey Respondents**  
**San Mateo County Child Care Needs Assessment - 2022**

QA: Residential Zip Code Region	Responses	Percent	QB: Working Zip Code Region	Responses	Percent
North	538	46.4%	North	420	36.2%
Central	376	32.4%	Central	294	25.3%
South	129	11.1%	South	113	9.7%
Coast	103	8.9%	Coast	86	7.4%
Other	14	1.2%	Other	247	21.3%
<b>Total</b>	<b>1,160</b>	<b>100.0%</b>	<b>Total</b>	<b>1,160</b>	<b>100.0%</b>

Regions include the following zip codes:

- North Region: 94015, 94014, 94005, 94080, 94066, 94030, 94010, 94401
- Central Region: 94402, 94403, 94404, 94065, 94002, 94070, 94062, 94063, 94061
- South Region: 94027, 94025, 94303, 94028, 94020, 94021
- Coast Region: 94044, 94038, 94019, 94060, 94074, 94037

Sources: Center for Learning Analytics at the San Mateo County Office of Education; Brion Economics, Inc.

**Table 3-18** summarizes the current use and preferred use of child care by age group, expressed as a total % of respondents using or interested in licensed care. The remainder of care used includes oneself (i.e., parent or guardian), paid and unpaid friends, family, and neighbors (FFNs), and nannies. This data, which is specific to San Mateo County, has been integrated into the supply and demand analysis for the overall Needs Assessment in **Chapter 2**.

**Table 3-18**  
**Use of Child Care in Formal Licensed Setting, Compared to Preference**  
**San Mateo County Child Care Needs Assessment - 2022**

Age Group	Current Use (Q7,8,9) % of Total Responses	Preferred Use (Q21, 22, 23) % of Total Responses	Difference Pref over Use
Infants - Under 2 Years	37.2%	35.0%	-2.2%
Preschool, 2-4 Years	61.2%	68.8%	7.7%
School Age, 5 or older	46.9%	54.0%	7.2%

Sources: Center for Learning Analytics at the San Mateo County Office of Education; Brion Economics, Inc.

### Parent Survey Highlights

About 70% of respondents said they use child care for work outside the home, and another 14% for work inside the home, for a total of about 84%. About 80% use child care near their home or their child’s school. About 17% of respondents have children with special needs and of those, 80% have an IEP or IFSP. Eighty-two parents said their child would attend Transitional Kindergarten (TK) in the fall of 2022, and another 157 said their child would be in kindergarten in the fall of 2022.

About 35% reported they observed changes or delays in development due to COVID-19. The most frequent developmental changes were:

- Increased anxiety (47% of responses)
- Challenges in expression of emotions (45% of responses)
- Challenges with problem solving (41% of responses)

Parents were asked about a number of considerations when searching for child care. The top challenges reported by parents were:

- Affordable care: 65% of respondents indicated this was somewhat or very hard to find
- Able to Enroll Right Away: 53% of respondents indicated this was somewhat or very hard to find
- Desired Schedule: 41% of respondents indicated this was somewhat or very hard to find

In contrast, parents reported these considerations are easier to find:

- Educators/caregivers/staff speak same language(s) as your family: 60% reported somewhat or very easy to find
- Safe and Healthy: 59% reported somewhat or very easy to find
- Well-trained, experienced educator/caregiver: 52% reported somewhat or very easy to find

There were two considerations where parents were split:

- Good Quality: 52% reported as somewhat or very easy; 41% of respondents indicated this was somewhat or very hard to find
- Convenient Location: 54% of respondents indicated this was somewhat or very easy to find; 42% of respondents indicated this was somewhat or very hard to find

About 87% of respondents were women and 74% had four or more people living in their household. About 72% of respondents were born between 1980 and 2000. About 50% reported being of Latinx/Hispanic background, and about 44% have a Bachelor’s degree or higher.

Parents were asked about the resources they used when searching for child care. People most commonly used recommendations from family or friends (52%), Google search (35%), and information from the child’s school (33%).

Parent preferences for the type of child care did vary by region of the County, household income level, and race/ethnicity are included in **Appendix G**.

## Section 17 – Access to Care

Local Planning Councils are required to submit local priority needs for subsidized child care by age and zip code each year. These reports identify needs by age group and type of care, including State Preschool.<sup>27</sup> As of 2021-2022, the priorities (highest) out of 29 total zip codes in the County include:

- Nine zip codes are identified as a high priority for child care for CSPP or Preschool age children;
- 14 zip codes are identified as high priority for CCTR or Infant/Toddler children; and,
- 20 zip codes are identified as high priority for CCTR School Age children.

A zip code qualifies as Priority 1 when there are 40% or more eligible children underserved, and there are more than 150 children underserved. The CCPC collaborates diligently with its partners to increase the supply of child care and increase access for families and children.

The Big Lift Initiative in San Mateo County is also focused on increasing access to early learning and education. The Big Lift’s early learning transformation is focused on four key pillars: providing high-quality Preschool and summer learning, reducing absenteeism, and increasing family engagement. The Big Lift initiative starts with 2 years of high-quality Preschool, followed by 3 years of “inspiring summers” programs. Family engagement initiatives support students’ literacy skills, and collaborative

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<sup>27</sup>[https://www.smcoe.org/assets/files/About\\_FIL/Child%20Care%20Partnership%20Council\\_FIL/San%20Mateo%20County%20LPC%20Priorities%202021-22%20Final.pdf](https://www.smcoe.org/assets/files/About_FIL/Child%20Care%20Partnership%20Council_FIL/San%20Mateo%20County%20LPC%20Priorities%202021-22%20Final.pdf)

interventions promote the importance of school attendance. Currently, The Big Lift initiative is serving 3,000 children countywide.<sup>28</sup>

The coastal towns of San Mateo County are small, rural, and harder to serve due to the low population density and lack of facilities. Build Up San Mateo, as discussed in **Section 13** above, includes three projects on the coast:

- Half Moon Bay – an 18-space Infant project in progress
- Pescadero – a 12-space Infant project in progress
- Pacifica – a 40-space Infant and Preschool project in the pipeline

These three projects will help increase the supply in the coastal towns. As discussed in **Chapter 2**, the Half Moon Bay area<sup>29</sup> has a shortage of 674 child care spaces for all age groups currently or about 55% of the demand is currently being met (see **Table 2-11**). The South Coast area<sup>30</sup> has a slight surplus of spaces relative to the demand currently of 44 spaces, including a shortage of eight Infant spaces, a surplus of 18 Preschool spaces, and 41 School Age spaces.

## Section 19 – Family Self-Sufficiency

Another resource for understanding family incomes in San Mateo County is the California Family Needs Calculator (formerly the Self-Sufficiency Standard Tool). Assuming a four-person household, with two adults, one infant, and one preschool-age child in 2021, the family would require an annual income of \$176,910 to be self-sufficient.<sup>31</sup> This is significantly more than the federal poverty guidelines or the SMI for a family of four. **Table 3-19** shows the various incomes required for different-sized families to be self-sufficient, including two-parent and single-parent households. As noted above, the median household income of a four-person family is currently \$181,372, or slightly more than the income needed for self-sufficiency (see **Table 3-12a**).

The required household income varies for two-parent and one-parent households and the age of children, as shown in **Table 3-19**. For a single-headed household with an Infant and Preschooler, the self-sufficiency income is \$173,556. The estimated median income for a single female-headed household with children present is \$59,747 or only 34% of that needed for self-sufficiency. For a male-

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<sup>28</sup> <https://www.thebiglift.org/>

<sup>29</sup> Half Moon Bay Region includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

<sup>30</sup> South Coast includes La Honda, Loma Mar, Pescadero and San Gregorio.

<sup>31</sup> Data from the California Family Needs Calculator for 2021. Viewed April 2022. <https://insightccd.org/2018-family-needs-calculator/>

headed household with children present that median income is \$89,872, or about 52% of that needed for self-sufficiency.

The median household income in San Mateo for all households is \$128,091, which is below all the self-sufficiency figures listed in **Table 3-19**. As shown at the bottom of the table, child care costs are estimated to equal 25% to 27% of the monthly self-sufficiency income. For many families that make less than this amount, child care expenses can be as high as rent.

In contrast, the self-sufficiency data for one adult and no children is shown in **Table 3-19**. The annual salary or wage needed for self-sufficiency is about \$68,500, which is more than a female householder with no children living alone at \$55,600 and less than a male householder living alone or \$77,000 (see **Table 3-12a**).

**Table 3-19 - Section 19**  
**Self-Sufficiency by Household Type and Size - San Mateo County**  
**San Mateo County Child Care Needs Assessment - 2022**

Item	1 Adult No Children	1 Adult, 1 Infant, 1 Preschooler	1 Adult, 1 Infant 1 Preschooler, 1 School Age	1 Adult, 2 Preschoolers	2 Adults, 1 Infant, 1 Preschooler	2 Adults, Preschooler, 1 School Age	2 Adults, 2 Preschoolers
Rent	\$2,920	\$3,543	\$4,546	\$3,543	\$3,543	\$4,546	\$3,543
Utilities	\$103	\$125	\$160	\$125	\$125	\$160	\$125
Child Care	\$0	\$3,891	\$5,147	\$3,625	\$3,891	\$5,147	\$3,625
Health Care	\$230	\$888	\$908	\$887	\$946	\$967	\$945
Food	\$340	\$677	\$918	\$685	\$950	\$1,162	\$958
Transportation	\$329	\$337	\$337	\$337	\$646	\$646	\$646
Miscellaneous	\$392	\$946	\$1,202	\$920	\$1,010	\$1,263	\$984
Taxes	\$1,390	\$4,490	\$6,870	\$4,289	\$4,007	\$5,737	\$3,821
Child Care Tax Credit (-)	\$0	(\$100)	(\$100)	(\$100)	(\$100)	(\$100)	(\$100)
Child Tax Credit (-)	\$0	(\$333)	(\$500)	(\$333)	(\$333)	(\$500)	(\$333)
Earned Income Tax Credit (-)	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>SELF-SUFFICIENCY STANDARD</b>							
Hourly Wage (per adult)	\$32.41	\$82.18	\$110.73	\$79.42	\$41.72	\$54.06	\$40.38
Monthly Wage	\$5,704	\$14,463	\$19,489	\$13,978	\$14,684	\$19,028	\$14,214
<b>Annual Wage</b>	<b>\$68,454</b>	<b>\$173,556</b>	<b>\$233,865</b>	<b>\$167,734</b>	<b>\$176,210</b>	<b>\$228,337</b>	<b>\$170,570</b>
Emergency Savings (Monthly)	\$254	\$1,083	\$1,443	\$973	\$387	\$554	\$372
Child Care as % of SS Monthly	na	26.9%	26.4%	25.9%	26.5%	27.0%	25.5%

Data from <https://insightccd.org/family-needs-calculator/>  
 Source: Insight Center and Brion Economics, Inc.

## Section 20 – Emergency Preparedness

At the onset of the COVID-19 pandemic, several nonprofit and governmental organizations that work in the child care field came together to form the San Mateo County Child Care Response Team. In June of 2021, members of the Response Team prepared a report to define the purpose of the team, the roles of the team members, the steps taken to address pandemic response and recovery, and what is still needed by the child care field. The key findings are summarized below. This response plan represents the most recent example of emergency preparedness in the County and was a highly coordinated effort.

In March of 2020, the SMC COVID-19 Child Care Response Team was formed to manage communications (in multiple languages and formats), informational/technical workshops for parents and child care providers (including an online Re-opening Forum), fundraising, and advocacy. The team consisted of partners from various sectors of the community who functioned as liaisons with key local and state organizations/agencies. The team identified three key areas of focus:

1. Establishment of emergency child care for essential workers;
2. Economic relief for child care providers, particularly home-based and other private child care providers; and,
3. Emergency child care supplies.<sup>32</sup>

In 2020 the Response Team surveyed essential workers and identified 474 children in need of licensed child care who were referred to 4Cs to access child care vouchers. In June 2020 and again in April 2021, the Response Team surveyed child care providers. In total, 85% of survey respondents had lost income due to the COVID-19 pandemic and 45% had less than one month of income in reserves.<sup>33</sup>

### Recent COVID-19 Provider Survey

In April of 2021, the San Mateo County COVID-19 Child Care Response Team conducted a survey of child care providers to evaluate the impacts of COVID-19 on child care providers' operations and expenses. The survey was conducted in Spanish, English, and Chinese. They received 161 responses.

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<sup>32</sup> San Mateo County COVID-19 Child Care Response Team: "It Takes a Village...The Story of the San Mateo County COVID-19 Child Care Response Team" Report June 2021. See Pages 1-2.

<sup>33</sup> Ibid. See Page 3.

## Key Findings:

- The types of providers surveyed were licensed center-based care providers (78), small licensed FCCHs (40), large licensed FCCHs (40), license-exempt centers (2), and nannies (1), for a total of 161 responses.
- The type of programs comprised 75 family child care homes, 58 private/for-profit programs, 30 nonprofit programs, and 17 school district programs. Faith-based, employer-sponsored, parent co-op, and “other” comprised 11 total programs.
- Of those providers currently serving children, 106 responded that all of their classrooms are open and 38 responded that some classrooms are open. Currently, 91% of respondents have some or all classrooms open, compared to 58% in 2020. It appears that many providers have managed to reopen their closed classrooms since 2020.
- Pre-COVID staff totaled 1,716, of which 233, or about 14% were furloughed or laid off due to the pandemic. Approximately 14% of the workforce’s employment was impacted by COVID, and 68 programs or 42% reported that they reduced staff pay.
- Of the respondents, 41% of licensed child care centers plan to increase tuition or already have.
- About 17% of centers said they have less than one month of operating cash on hand and about 58% of small and large FCCHs had one month or less cash on hand. Overall, 64 providers, or 45% of respondents said they had one month or less of savings on hand.
- Of the FCCH respondents, 47% said they have incurred debt due to COVID. Approximately 32% of Center respondents have also incurred debt due to the pandemic.
- Confidence that Centers would be able to remain open through 2021 was 65%, whereas only 39% of FCCHs felt confident they would remain open throughout 2021.
- The main supports identified in order to return to “normal” operations were financial assistance with personnel costs, rent, lease or mortgage assistance, and financial assistance to upgrade facilities. Additionally, access to free or low-cost Personal Protective Equipment and cleaning supplies to keep safety measures in place, education for families to increase awareness of returning to child care and help to find and hire additional staff were the top responses. The additional comments yielded responses asking for up-to-date, accurate, and logical state regulations.

Key partners from around the County provided support such as preservation of facilities and determining new options, data collection, and analysis of community needs, pilot programs for workforce development of licensed care providers, resources and support for child care centers, pandemic recovery, and state licensing support.<sup>34</sup>

The Response Team advised the County of San Mateo on how to use \$4.5M in federal CARES dollars to establish the COVID-19 Child Care Relief Fund which provided emergency grants of up to \$55,000 for child care centers and \$10,000 to family child care homes (FCCHs). The federal funds were leveraged with \$835,000 in private contributions. The Child Care Relief Fund supported 287 child care programs serving 8,000 children, allowing 100% of center-based grantees and 94% of FCCHs to remain in business. The County also created a Learning Hub Expansion Fund (\$1.98M) to create 730 new student spaces to engage in supervised distance learning.<sup>35</sup>

Upon advice from CCPC, the County did another round of funding using federal American Rescue Plan Act (ARPA) funding. On July 26, 2022, the San Mateo County Board of Supervisors approved \$4,000,000 in American Rescue Plan Act (ARPA) funds to create the San Mateo County 2022 Childcare Grant Program. Given the widespread financial impacts of the pandemic on the childcare sector, this grant intends to provide financial assistance to childcare facilities so that the most vulnerable communities have care available for their children.

The grant application will be open online from August 26 to September 9, 2022 on the SMC Strong website. There will also be an FAQ document posted on the site for reference.

Grants will be distributed to centers based on the number of enrolled children:

- \$10,000 for facilities with up to 10 children
- \$25,000 for facilities with 11 to 30 children
- \$40,000 for facilities with 31 to 60 children
- \$55,000 for facilities with over 60 children

On July 26, 2022, the San Mateo County Board of Supervisors approved \$2,562,500 in American Rescue Plan Act (ARPA) funds to create the San Mateo County 2022-23 Out-of-School Care Grant Program. This grant program is for providers that commit to using grant funds to:

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<sup>34</sup> Ibid. See Page 2.

<sup>35</sup> Ibid. See Pages 4-5.

- Expand access to out-of-school care programs for low-income and youth from historically marginalized or underrepresented backgrounds or communities (including students with special needs, in foster care, English Language Learners, and experiencing homelessness).
- Support the social-emotional well-being of youth to mitigate the setbacks and hardships associated with COVID-19.
- Provide opportunities for youth to reinspire and propel learning to counterbalance the loss of learning opportunities attributed to the COVID-19 pandemic and distance learning.

Selected grantees will be awarded funding proportional to the number of youth they currently serve (prior to award), as follows:

- Program sites currently serving less than 100 youth: \$50,000
- Program sites currently serving 100 or more youth: \$75,000

Emergency supplies were distributed to child care providers, including diapers, gloves, wipes, sanitizers, and children’s books – 7,099 items in total. This effort comprised 599 deliveries to over 300 providers.

The team further contributed to San Mateo County’s Recovery Initiative which included Education and Child Care as one of five key recovery issues for the County. The Recovery Initiative identified the need to expand access to affordable child care for children ages 0 to 5 years old, and support school and out-of-school care. The partnership with the Recovery Initiative included vaccination outreach by partnering with the County Health Department, and visioning of long-term recovery funding by recognizing the ongoing challenges to child care centers and family child care homes’ sustainability. The partners of the Response Team continue their advocacy efforts for structural changes and equity improvements to make child care more available and affordable to all families regardless of income as a key focus, as well as higher wages for ECE workers and making child care infrastructure more resilient.<sup>36</sup>

## Homelessness in San Mateo County

In the year 2019, a study was conducted titled “San Mateo County One Day Homeless Count and Survey” prepared by San Mateo County Human Services Agency for San Mateo County. The data was shared with the United States Department of Housing and Urban Development and is included in nationwide homeless counts. The key findings are summarized below.

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<sup>36</sup> Ibid. See Page 6.

On January 31, 2019, approximately 400 volunteers from SMC consisting of community-based providers, members of the public, City and County staff, and community expert guides set out by foot and car to conduct the one-day observational count and survey (count) of homelessness in each census tract of the County. The results provide data to help the County and its partners assess homelessness and assist these people with returning to housing as quickly as possible. **Table 3-20** summarizes the counts by location for the last five survey years, or 2011, 2013, 2015, 2017, and 2019.

In 2019, the number of people experiencing homelessness in SMC totaled 1,512 and comprised 901 people who are unsheltered (living in the streets, cars, recreational vehicles (RVs), and tent/encampments). An additional 611 people were living in emergency homeless shelters or transitional housing. The 2019 total of 1,512 people is higher than the counts in 2017 (1,253 people) and 2015 (1,483 people), but lower than in 2011 (1,861 people) and 2013 (2,002 people). In the 2019 count, the number of people living in homeless shelters is similar to 2017. The overall increase in people living in RVs from 2017 to 2019 increased 127%, as well as an increase of 24% in people living on the streets. However, there was a decrease in the number of people sleeping in cars by 7% and in tents/encampments by 31%. No unsheltered families were observed in the 2019 count, the number of families unsheltered is estimated at 16, which has decreased from the 2017 count when 19 families were estimated to be unsheltered.

The breakdown of the 2019 count includes 66 people living in tents/encampments, 494 people living in RVs, 184 people living in cars, and 157 people living on the streets. The primary driver of fluctuations in overall homelessness is the number of people experiencing unsheltered homelessness.

The three main geographic areas that account for the largest number of people experiencing unsheltered homelessness are East Palo Alto (107), Pacifica (116), and Redwood City (221). **Table 3-21** summarizes the counts by city and year. Note that the counts by the city are different from the total counts by location.

The overall findings show that people experiencing homelessness on the count day in 2019 increased by 21% from 2017 to 2019, but this decreased from 2011 and 2013 (see **Table 3-20**). The increase from 2017 to 2019 was primarily driven by people living in RVs. The County and its partners are working on ways to ensure these people are connected to the available safety net and homeless services, as well as exploring new strategies and ways to serve this specific population. The count found an overall decrease in families with children experiencing homelessness, people sleeping in cars, and people in tents/encampments.

**Table 3-20**  
**Summary of Homelessness Counts by Type and Year**  
**San Mateo County Child Care Needs Assessment - 2022**

Location	2011	2013	2015	2017	2019
<b>Unsheltered Counts</b>					
People on the Streets	466	353	331	127	157
People in Cars	126	231	157	197	184
People in RVs	246	392	151	218	494
People in Tents/Encampments	324	323	136	95	66
Subtotal Unsheltered Counts	1,162	1,299	775	637	901
Year over Year Change		137	(524)	(138)	264
Year over Year % Change		12%	-40%	-18%	41%
<b>Sheltered Count</b>					
People in Emergency Shelters	258	272	254	211	266
People in Transitional Housing	441	431	454	405	345
Subtotal Sheltered Counts	699	703	708	616	611
Year over Year Change		4	5	(92)	(5)
Year over Year % Change		1%	1%	-13%	-1%
<b>Total Counts</b>					
	1,861	2,002	1,483	1,253	1,512
Year over Year Change		141	(519)	(230)	259
Year over Year % Change		8%	-26%	-16%	21%

Sources: San Mateo County One Day Homeless Count and Survey-2019” prepared by San Mateo County Human Services Agency for San Mateo County; Brion Economics, Inc.

**Table 3-21**  
**Summary of Homelessness Counts by City and Year**  
**San Mateo County Child Care Needs Assessment - 2022**

City	2011	2013	2015	2017	2019
Atherton	1	-	1	-	1
Belmont	1	43	11	3	7
Brisbane	-	34	21	19	4
Burlingame	3	13	7	21	25
Colma	1	7	3	1	8
Daly City	44	27	32	17	66
East Palo Alto	385	119	95	98	107
Foster City	-	7	-	6	4
Half Moon Bay	41	114	84	43	54
Hillsborough	-	-	-	-	-
Menlo Park	72	16	27	47	27
Millbrae	1	21	8	7	9
Pacifica	95	150	63	112	116
Portola Valley	16	2	-	1	-
Redwood City	233	306	223	94	221
San Bruno	14	98	8	26	12
San Carlos	9	10	20	28	30
San Francisco Airport	9	5	1	3	21
San Mateo	68	103	82	48	74
South San Francisco	122	172	55	33	42
Unincorporated	47	46	32	30	73
<i>Coastside</i>			22		60
<i>Central</i>			-		-
<i>North</i>			-		6
<i>South</i>			10		7
Woodside	-	6	2	-	-
<b>Total</b>	1,162	1,299	775	637	901
Year over Year Change		137	(524)	(138)	264
Year over Year % Change		12%	-40%	-18%	41%

Sources: San Mateo County One Day Homeless Count and Survey-2019” prepared by San Mateo County Human Services Agency for San Mateo County; Brion Economics, Inc.

## 4. Workforce Shortage, Wages, and Costs

This chapter focuses on Child Care Workforce needs, challenges, costs, pay equity, educational needs of the workforce, and their associated costs. It also includes information on the child care workforce’s current pay, living wage requirements for San Mateo County, and State reimbursement rates. A detailed discussion of the education challenges of the child care workforce is provided along with an estimate of what it would cost to bring all lead center-based teachers to a BA/BS education level. The data presented in this Chapter represents the most current data available, as noted, and may not be as of 2022. This chapter includes a survey of working nannies in the County conducted in the Spring of 2022. This chapter meets the requirements of Section 15 of the State Needs Assessment Template.

### Lack of Staff and Recruitment Strategies

Recently, half of the community-based preschools in the County reported needing more than 100 new Preschool teachers for subsidized programs, and a lack of staff limits their capacity to serve children in state Preschool programs, a problem that will only worsen with the implementation of Universal Pre-Kindergarten or Transitional Kindergarten (TK) if staff leave to work in those settings.

As funding allows, the SMCOE is pursuing the following recruitment strategies:

1. Identify paraprofessionals and substitutes interested in teaching young children and support them to obtain or advance to a higher level on the Child Development Permit Matrix.
2. Strengthen efforts to encourage high school students to pursue ECE careers.
3. Support the San Mateo Community College District’s new Early Childhood Apprenticeship Program (ECAP) which will target CSPP programs and CBOs for apprentice placements.
4. Provide prospective teachers with information about job openings at school districts using local resources such as the Good2Know (community partner) and community college job boards.
5. Build on prior successes in attracting new teachers from the community through teacher residency programs which result in greater longevity at schools and in the teaching profession.

### Workforce Needs, Wages, and Cost Analysis

#### Current ECE Workforce Estimates

**Table 4-1** summarizes the adult-to-child ratios for providers in the State, including Title 22 and Title 5. Title 22 includes the requirements for licensed child care providers, and Title 5 is for providers that contract with the State to offer subsidized care. These ratios are used to estimate the total workforce in the County, as a proxy for teachers. License-exempt providers may have higher child-to-teacher

ratios, but these ratios have been applied to the entire provider supply database. Thus, our estimates may slightly overstate the total workforce.

**Table 4-1 - Section 15**  
**Estimated Adult to Child Ratios based on State Licensing Requirements**  
**San Mateo County Child Care Study - 2022**

Title/Age Group	Adults Per	# of Children	Notes
<b>Title 22/Child Care Centers</b>			
Infants (1)	1	4	
Preschool	1	12	
School Age	1	15	
<b>Title 5/Subsidized Care</b>			
Infants (1)	1	3	or 4 children in 0-3 classrooms
Preschool	1	8	
School Age	1	14	
<b>Small Family Child Care Homes (2)</b>			
Infants (1)	1	4	Normally provide 6 or 8 spaces
All Children	1	6	may include up to 3 infants
Or	1	8	may include up to 2 infants and must include at least 2 children over the age of six
<b>Large Family Child Care Homes (2)</b>			
12 Spaces Homes	2	12	Normally provide 12 or 14 spaces up to 4 infants
14 Spaces Homes	2	14	may include up to 3 infants and must include at least 2 children over the age of six

(1) Infants are considered to be children under the age of 2.

(2) Provider's own children under the age of 10 must be included in adult to child ratio.

Sources: Community Care Licensing Division, California Department of Social Services; Brion Economics, Inc.

**Table 4-1a** estimates the number of child care workforce staff by type of provider and age group. In total there are an estimated 3,879 teaching staff working in the child care field in the County. These include FCCHs owners/operators that also serve as staff. There are an additional 484 center-based directors, 525 FCCH owners (included in the teaching staff estimate line) based on the total number of center-based programs/FCCH providers, and 968 support staff/aides. Overall, this brings the total workforce estimate to 5,331 workers. This represents 1.3% of the County's total employment base or the number of jobs in the County in 2022 (see **Table 2-4**).

**Table 4-1b** summarizes the increase in teaching and other staff needed to address the shortage of child care spaces in the County, as estimated in **Chapter 2**. As shown, there is a total shortage of 17,157 child care spaces for children 0 to 12 years old as of 2022. The shortage by age group is also shown.

Applying the same methodology discussed above, there is an additional need for 2,224 teachers, and 606 support staff/directors, for a total need, or, a staff shortage of 2,829. Note that this estimate does not provide an estimate for teachers needed to support subsidized spaces. The cost of annual wages for both existing child care staff and future needs is discussed further below.

**Table 4-1a - Section 15**  
**Estimate of ECE Workforce - Teachers and Other Staff - 2022**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Small FCCHs Spaces	Large FCCHS Spaces	Non-Subsidized Center Infant Spaces	Subsidized Center Infant Spaces	Non-Subsidized Center Preschool Spaces	Subsidized Center Preschool Spaces	Non-Subsidized Center School Age Spaces	Subsidized Center School Age Spaces	Total Center Based Care	FCCH and Center Totals, 0 -12 Years
No. of Spaces (1,2)	2,004	3,762	1,380	211	13,529	2,638	14,875	3,044	35,677	41,443
No. of Providers (3)	253	272							484	1,009
<b>No. of Teachers Required (1)</b>	<b>253</b>	<b>544</b>	<b>345</b>	<b>70</b>	<b>1,127</b>	<b>330</b>	<b>992</b>	<b>217</b>	<b>3,082</b>	<b>3,879</b>
Estimated Center Directors (4)	na	na	na	na	na	na	na	na	484	484
Aides and Support Staff (5)	na	na	na	na	na	na	na	na	968	968
<b>Estimated Total Staff</b>	<b>253</b>	<b>544</b>	<b>na</b>	<b>na</b>	<b>na</b>	<b>na</b>	<b>na</b>	<b>na</b>	<b>4,534</b>	<b>5,331</b>

- (1) Based on Title 22 and Title 5 teacher ratio requirements. See Table 3-16. Nonsubsidized follows Title 22 and Subsidized follow Title 5.  
 For FCCHs, the one teacher accounts for one owner/director.  
 (2) FCCH spaces are for all age groups. See Table 3-5.  
 (3) See Table 3-5.  
 (4) One director per center-based provider. FCCH directors are counted in the "teacher" estimate, so as not to double count.  
 (5) Two support staff / aides per center-based provider.  
 Sources: Community Care Licensing Division, California Department of Social Services; Brion Economics, Inc.

**Table 4-1b - Section 15**  
**Estimated New Required ECE Teachers and Other Staff to Meet Shortfall - 2022**  
**San Mateo County Child Care Needs Assessment - 2022**

Item	Infant Spaces	Preschool Spaces	School Age Spaces	Total Spaces, 0 -12 Years
Shortage of Spaces (1)	5,790	1,107	10,260	17,157
<b>No. of Teachers Required (1)</b>	<b>1,448</b>	<b>92</b>	<b>684</b>	<b>2,224</b>
Estimated Owners Directors (2)	na	na	na	202
Aides and Support Staff (5)	na	na	na	404
<b>Estimated Total Staff</b>	<b>na</b>	<b>na</b>	<b>na</b>	<b>2,829</b>

- (1) See Table 2-11 for estimated overall shortage of child care spaces at 2022.  
 (2) Includes Owners and Directors. Two directors per Center Provider.  
 Sources: Community Care Licensing Division, California Department of Social Services; Brion Economics, Inc.

## Living Wage Scale for ECE Teachers

This section analyzes the cost of bringing current staff up to a living wage and compares this to current wages. Current wage data for the analysis was collected as part of the Workforce Survey conducted by Seed Collaborative for this effort.<sup>37</sup> The estimated living wage data is from The Living Wage Calculator from MIT.<sup>38</sup> These living wages vary by size and type of household and number of children present, as shown in **Table 4-2**. For this analysis, we have calculated the average percent increase overall from current wages by type of child care worker to meet an average living wage for each staff category. The percent increase required varies by the base hourly rate gathered from the Workforce Survey. For instance, to bring someone currently making \$20 per hour to a living wage in the County requires an increase of 263%.

The current average hourly wage by child care worker category in San Mateo County is shown in the first column of **Table 4-2**. Also shown in **Table 4-2** are the living wage increases needed to bring current ECE workers to a living wage for San Mateo County ranging from a 168% increase for child care center directors to as high as a 263% increase for teacher aides and support staff.

**Table 4-3** summarizes the current hourly wages, the required hourly living wages, and the net change or increase required to bring ECE workers to a living wage. As shown, the required increase is significantly more than ECE workers make currently. For this analysis, the living wage is estimated at about \$53 per hour irrespective of education and occupation level. To adjust for these differences, we apply a 10% increase factor to each staff level above a teacher's aide/support staff role. The net increase in hourly rate required to get to a living wage is more than workers currently make per hour across the board.

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<sup>37</sup> See San Mateo County Child Care Workforce Study Report, prepared for San Mateo County Child Care Partnership Council by Seed Collaborative, July 2022.

<sup>38</sup> The Living Wage Calculator was first created in 2004 by [Dr. Amy K. Glasmeier](#), Massachusetts Institute of Technology. For San Mateo County Data see <https://livingwage.mit.edu/counties/06081>.

**Table 4-2**  
**Estimated Living Wages by Household Size and Status for San Mateo County (All Occupations)**  
**San Mateo County Child Care Council Needs Assessment - 2022**

Item	1 Adult Household & No. of Children - 1 Adult Working				2 Adult Household & No. of Children - 1 Adult Working				2 Adult Household & No. of Children - 2 Adults Working			
	0	1	2	3	0	1	2	3	0	1	2	3
Living Wage	\$30.81	\$59.87	\$73.48	\$97.86	\$44.57	\$53.63	\$59.60	\$68.99	\$22.29	\$31.82	\$39.81	\$49.51
Poverty Wage	\$6.19	\$8.38	\$10.56	\$12.74	\$8.38	\$10.56	\$12.74	\$14.92	\$4.19	\$5.28	\$6.37	\$7.46
Min. Wage in CA	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00
LW as % of Min Wage	205%	399%	490%	652%	297%	358%	397%	460%	149%	212%	265%	330%
<b>Average % Increase (1)</b>												
Teacher Aides & Support Staff	263%											
Asst./Assoc. Teacher	262%											
Lead Teachers/Asst. Directors	200%											
FCCH Owners	251%											
Directors	168%											

(1) The average percent increase to a living wage was calculated for each current wage by position shown in Table 4-3, averaged against all household sizes.

These data are for San Mateo County as of 2022. see <https://livingwage.mit.edu/counties/06081>

Sources: 2022 Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology; Brion Economics, Inc.

**Table 4-3**  
**Estimated Wage Rate Increase to Living Wage Rate for ECE Workers**  
**San Mateo County Child Care Council Needs Assessment - 2022**

Item	Current Hourly Wage (1)	Percent Increase (2)	Living Hourly Wage (2)	Adjustment for Ed. & Title (3)	Net Change	Percent Increase
<b>Estimated Child Care Workforce</b>						
Teacher Aides & Support Staff	\$20.00	263%	\$52.60	\$52.60	\$32.60	163%
Asst./Assoc. Teacher	\$20.08	262%	\$52.61	\$57.86	\$37.78	188%
Lead Teachers/Asst. Directors	\$26.32	200%	\$52.64	\$63.65	\$37.33	142%
FCCH Owners	\$21.00	251%	\$52.71	\$70.01	\$49.01	233%
Directors	\$31.43	168%	\$52.80	\$77.01	\$45.58	145%

(1) Current wages are from the Workforce Survey conducted for the 2022 Needs Assessment in "San Mateo County Child Care Workforce Study Report" prepared for San Mateo County Child Care Partnership Council, prepared by Seed Collaborative (Final Report July 2022).

(2) Based on average percent increase to a living wage, as calculated for each current wage in Table 4-2.

(3) Assumes a 10% increase for each increase in education/title by position, from teacher aides and support staff.

Sources: 2022 Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology; Brion Economics, Inc.

**Table 4-4** estimates the actual cost of bringing current ECE workers up to a living wage. Using the hourly rates calculated in **Table 4-3**, and the number of ECE workers in San Mateo County, total current wages are \$253.5 million per year. Using the living hourly wages for the same number of staff generates an annual cost of \$675.7 million per year or a net increase of \$422.1 million per year. This is an increase of 167% overall from current wages.

**Table 4-4**  
**Estimated Current Wages of ECE Workforce and Living Wage Estimate**  
**San Mateo County Child Care Council Needs Assessment - 2022**

Item	Current Average Hourly Wage	Living Hourly Wage (1)	Estimated Wage Increase	Estimated Staff (2)	Percent Distribution	Current ELC Annual Wages, All Staff	ELC Wage Gap to Living Wage	Total ELC Living Wages by Staff Type
<i>(in millions of dollars)</i>								
<b>Estimated Child Care Workforce</b>								
Teacher Aides & Support Staff (1)	\$20.00	\$52.60	\$32.60	1,441	27%	\$59.9	\$97.7	\$157.6
Asst./Assoc. Teacher	\$20.08	\$57.86	\$37.78	1,441	27%	\$60.2	\$113.2	\$173.4
Lead Teachers/Asst. Directors	\$26.32	\$63.65	\$37.33	1,441	27%	\$78.9	\$111.8	\$190.7
FCCH Owners	\$21.00	\$70.01	\$49.01	525	10%	\$22.9	\$53.5	\$76.5
Directors (2)	\$31.43	\$77.01	\$45.58	484	9%	\$31.6	\$45.9	\$77.5
<b>Total Teachers and EC Staff</b>				<b>5,331</b>	<b>100%</b>	<b>\$253.5</b>	<b>\$422.1</b>	<b>\$675.7</b>
Wage Percent Increase							167%	

Note assumes all positions are Full Time Equivalent (FTEs).

(1) Assumes Living Wage from MIT; see Table 4-3; Each level increases 10% above teacher aides/support staff.

(2) See Table 4-1a for estimate of current child care workforce.

Sources: 2022 Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology; Brion Economics, Inc.

**Table 4-5**  
**Required Living Wages for ECE Workforce and Funding Gap to Meet Current Shortfall of Spaces**  
**San Mateo County Child Care Council Needs Assessment - 2022**

Item	Living Hourly Wage (1)	Estimated Staff Shortage to meeting Full Demand (2)	Percent Distribution	Estimated Living Wages for Required Staff	Average FT Annual Salary
<i>(in millions of dollars)</i>					
<b>Estimated Child Care Workforce</b>					
Teacher Aides & Support Staff (1)	\$52.60	942	33%	\$103.1	\$109,408
Asst./Assoc. Teacher	\$57.86	741	26%	\$89.2	\$120,349
Lead Teachers/Asst. Directors	\$63.65	741	26%	\$98.1	\$132,384
Directors/FCCH Owners	\$73.51	404	14%	\$61.8	\$152,903
<b>Total Teachers and EC Staff</b>		<b>2,829</b>	<b>100%</b>	<b>\$352.2</b>	<b>\$124,496</b>

Note assumes all positions are Full Time Equivalent (FTEs).

(1) Assumes Living Wage from MIT; see Table 4-3; Each level increases 10% above teacher aides/support staff.

(2) See Table 4-1b for estimate of staff needed to meet current shortage of child care spaces.

Sources: 2022 Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology; Brion Economics, Inc.

## New ECE Workforce Needs

**Table 4-5** summarizes the cost of employing enough ECE workers to fill the current child care space gap or shortage estimated in **Chapter 2**. Using the living wage data above, the required 2,829 workers needed to fill the current shortfall would require total wages of \$352.2 million per year. The average salaries associated with a living wage would be about \$125,000, overall, and for a lead teacher about \$132,000 per year to about \$153,000 for an Owner/Director. The section below on the *Economic Benefits of Child Care on the Local Economy* explains how these costs benefit the economy overall.

**Table 4-6** summarizes the average salaries and net increase in salaries needed to attain a living wage for ECE workers. The overall average living wage salary is about \$134,000 for all workers. The overall current average salary of all ECE workers is \$49,500 per year for all workers, assuming the reported hourly rate is applied to full-time work (i.e., 2,080 hours per year). Overall, salaries need to increase by 270% overall to equal a living wage, according to MIT data.

**Table 4-6**  
**Comparison of Current Full-Time Salaries to Living Wage Salaries for ECE Workforce**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Living Wage Salary (1)	Current Average Salary by Type of Worker (2)	Current Salary as % of Living Wage
Teacher Aides & Support Staff	\$109,408	\$41,600	38%
Assist./Assoc. Teacher	\$120,349	\$41,766	35%
Lead Teachers/Asst. Directors	\$132,384	\$54,746	41%
FCCH Owners	\$152,903	\$43,680	29%
Directors	\$152,903	\$65,374	43%
<b>Simple Average, All Workers</b>	<b>\$133,589</b>	<b>\$49,433</b>	<b>37%</b>

(1) See Table 4-5. Full-Time Equivalent (FTE) salaries.

(2) See current hourly rates in Table 4-3, times 2,080 hours per year or FTE salary.

Sources: 2022 Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology; Brion Economics, Inc.

## Reimbursement Rate Reform and Living Wage Analysis

The current reimbursement rates for subsidized child care by type of provider and age group are provided in **Tables 3-3** to **Tables 3-3b** in **Chapter 3**. These reimbursement rates are under review by the State Department of Social Services and the State Department of Education. New proposed rates are expected no later than November 2022.<sup>39</sup> Recent changes to rates are summarized below.

### California Rate Reform and Quality

The California Department of Social Services (CDSS) Child Care and Development Division has identified key elements and additional resource links, in multiple languages, to address the fragmented reimbursement rates for child care providers in California’s mixed-delivery child care system.<sup>40</sup>

#### Key Findings:

- Home-based child care providers who meet Title 22 standards, those who are exempt from licensure such as Family, Friend, and Neighbor (FFN) Providers, and some center-based programs are reimbursed using a Regional Market Rate (RMR) method, which accounts for geographic cost factors.
- State-contracted child care programs that must meet Title 5 and Title 22 standards are reimbursed at a flat Standard Reimbursement Rate (SRR), which varies by county.
- The State of California and Child Care Providers United (CCPU) reached an agreement that was signed by the Governor and ratified by CCPU in July 2021 to form the Joint Labor Management Committee to develop recommendations for a single regionalized reimbursement rate structure to be presented to the Department of Finance no later than November 15, 2022.
- The CDSS, in consultation with the California Department of Education, convened a working group to assess the methodology for establishing reimbursement rates and existing quality standards for child development programs and Preschool programs. The working group included an array of stakeholders, including CCPU representatives, teachers, administrative representatives of state-funded center-based contractors, child care experts, and parent representatives. The working group finalized its recommendations on August 15, 2022.

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<sup>39</sup> Pursuant to the Agreement reached between CCPU and the State of California, which was codified via Assembly Bill (AB) 131 (Chapter 116, Statutes of 2021), signed by the Governor on July 23, 2021, and ratified by CCPU on July 26, 2021, the State and CCPU have established a Joint Labor Management Committee (JLMC) to develop recommendations for a single reimbursement rate structure to present to the Department of Finance (DOF) no later than November 15, 2022.”

<sup>40</sup> Rate Reform and Quality. (n.d.) Retrieved August 15, 2022, from <https://www.cdss.ca.gov/inforesources/child-care-and-development/rate-reform-and-quality>.

- The recommendations highlight the idea that a regionalized rate system should compensate all teachers and child care providers for the true cost of providing care, reflecting the economic diversity of California, recognizing the costs of meeting varying quality standards and regulations, and strengthening the ability of California’s mixed delivery system to provide quality options.

## True Cost of Care in California

The current reimbursement rates are much lower than the actual costs of providing child care and do not support the actual true cost of care, as shown in **Table 4-7**. Using newly released data from P5 Fiscal Strategies (P5 Study), the true cost of child care by type of provider and age group is shown below and compared to the current 2022 reimbursement rates for Title 22 providers and Title 5 Centers on an annual basis.<sup>41</sup> The Title 22 columns show data for maximum reimbursement rates for programs such as Alternative Payment and CalWORKs. The Title 5 column compares data for CCSP and CCTR subsidized programs (there are no FCCHs receiving this type of funding in the County currently).

The P5 Study evaluates the impact of a living wage for child care providers, combined with benefits, normally required business expenses for a variety of provider types by different age groups, and consideration of CA Title 22 and Title 5 requirements. The authors call this the “true cost of care” as opposed to the price of care and cost of care. As discussed at the beginning of the P5 Study:

“The prevalent method of setting reimbursement rates for publicly funded child care is through a market rate approach, which relies on a study of market prices for child care through a market rate survey. Data from the market rate survey are then used to set maximum reimbursement rates for subsidized child care. The problem with this approach is that the market rates reflect the prices providers charge families, which in turn reflects what families can afford.”<sup>42</sup>

The results of this study show that the actual cost of child care is significantly higher than current reimbursement rates in California. For most types of child care, the true cost is more than double the reimbursement rates. According to the P5 Study, the current system reinforces current inequities and inadequacies in the market. The analysis in **Table 4-7** confirms this situation. The current reimbursement rates are significantly below what the “true cost of care” is, except for School Age care in Title 22 programs. Subsidized spaces are closer to the true cost of care. The Title 5 requirements are

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<sup>41</sup> Living Wage Cost of Care is from "Understanding the True Cost of Child Care in California: Building a Cost Model to Inform Policy Change" Prepared by Prenatal to Five Fiscal Strategies - Jeanna Capita, Katie Fallin Kenyon, and Simon Workman, August 2022, pages 27-29.

<sup>42</sup> Ibid. page 4.

more expensive to provide and yet the reimbursement rates are less than the true cost of care or 85% for Infant care, 54% for Preschool care, and 67% for School Age care in center settings.

**Table 4-7**  
**True Annual Cost of Quality Child Care in the Bay Area Compared to Annual Reimbursement Rates - 2022**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item/Age Group	Title 22 Rates (AP, CalWORKs, etc.)			CCSP/CCTR Title 5 Child Care Center
	Licensed Child Care Center	Small FCCH	Large FCCH	
<b><u>Living Wage Cost of Child Care (1)</u></b>				
Infant, 0-24 mo.	\$42,762	\$54,773	\$44,491	\$57,799
Preschooler, 2-5 years	\$27,658	\$54,773	\$44,491	\$37,374
School Age, 6-13 years	\$16,159	\$27,409	\$23,013	\$21,887
<b><u>2022 State Reimbursement Rates (2)</u></b>				
Infant, 0-24 mo.	\$24,522	\$18,339	\$18,339	\$49,268
Preschooler, 2-5 years	\$20,097	\$18,066	\$18,066	\$20,192
School Age, 6-13 years	\$16,336	\$16,631	\$16,631	\$14,590
<b><u>Reimb. Rates as % of Living Wage</u></b>				
Infant, 0-24 mo.	57%	33%	41%	85%
Preschooler, 2-5 years	73%	33%	41%	54%
School Age, 6-13 years	101%	61%	72%	67%

(1) Living Wage Cost of Care is from "Understanding the True Cost of Child Care in California: Building a Cost Model to Inform Policy Change" Prepared by Prenatal to Five Fiscal Strategies - Jeanna Capita, Katie Fallin Kenyon, and Simon Workman, August 2022, pages 27-29.

(2) Title 22 data from Erica Ramos, Program Manager- Family Eligibility, Child Care Coordinating Council of San Mateo County and CSPP/CCTR data from Sheryl Chan, State Preschool Manager, San Mateo County Office of Education, on August 26, 2022; as provided by Sarah Kinahan, Coordinator, Child Care Partnership Council, San Mateo County Office of Education.

Source: P5 Fiscal Strategies, California Cost of Quality Care Model, 2022; SMCOE; Brion Economics, Inc.

This situation directly impacts what wages providers can offer the child care workforce, the types of benefits they can offer workers, and the types of facilities they can afford to rent or own to provide care. Depending on the type of provider, California’s maximum reimbursement rates for Title 22 programs range from:

- 33% to 57% of the true cost of care for Infant care
- 33% to 73% of the true cost of care for Preschool care
- 61% to 101% of the true cost of care for School Age care

The true cost of care data used here is for the Bay Area, and not San Mateo County specifically, but these costs are likely reflective of the true cost of care in the County, given current housing costs, lease rates, and other operating costs.

## ECE Professional Development and Higher Education Needs

The Child Care Partnership Council hosted an input session on April 13, 2020, to understand the top barriers to accessing professional development and higher education. During this session, participants identified time, cost, language barriers, and location as the top barriers. ECE professionals also need technical assistance and educational support to complete General Education (GE) units. The group also discussed the confusion that ECE professionals may have about pathways to professional growth and career advancement because there are many workforce initiatives and a lack of centralized advising and navigation. San Mateo County faces a unique challenge which is that there are no ECE bachelor's (BA) programs in the County and students often have difficulties transferring from community college to BA programs in neighboring counties.

ECE professionals are served by three in-County institutions of higher education (IHEs): Skyline College in San Bruno (North County), the College of San Mateo (Central County)<sup>43</sup>, and Cañada College in Redwood City (South County). ECE professionals pursuing BAs, MAs, or PhDs must access higher education in neighboring counties or online. The SMCOE is seeking funding to strengthen partnerships with IHEs. SMCOE's ECE Teacher Stipend Program, funded primarily by the Workforce Pathways Grant, partners with IHEs to design educational advancement pathways. With new funding, SMCOE would continue to collaborate closely with the community college district to provide support to the ECE workforce around education plans, Inclusive Practices Certificates, permit applications and upgrades, and linkages with other resources. Additionally, transfer agreements need to be strengthened to allow pathways for BA completion and Teaching Credentials and in-County advising, courses, and support.

To understand professional development needs, SMCOE surveys 350 plus ECE teachers annually. The most recent survey was conducted in the Spring of 2022 and received 135 responses. Through this survey, SMCOE learned the following:

1. The majority of providers prefer online (58%) or hybrid training (27%), as opposed to in-person training.
2. However, 30% reported one or more technology barriers that impacted their ability to access online training.
3. A total of 36% expressed that they would prefer training to be offered in Spanish.

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<sup>43</sup> College of San Mateo does not have an ECE department and provides general education courses only.

4. The most desired training topics were:
  - a. Children with Special Needs – Adaptation, Inclusion, Individualization
  - b. Classroom Management
  - c. Classroom Environment (adaptations; health and safety protocols during the Pandemic)
  - d. Early Science (Curriculum/Content)
  - e. Social-Emotional Needs/Development
  - f. Early Childhood Leadership
  - g. Early Language and Literacy (Curriculum/Content)
  - h. Early Math (Curriculum/Content)
5. Most respondents expressed that training combined with coaching is their preferred professional growth strategy. The least popular option was coaching alone.
6. The most common focus areas in site-level Quality Improvement Plans were:
  - a. Child Observation
  - b. Curriculum/Content
  - c. Developmental and Health Screenings
  - d. Program Environment
  - e. Teacher-Child Interactions

Through the SMCOE ECE Teacher Stipend Program, the County has learned that ECE teachers are at all levels on the Permit Matrix, indicating a need to scaffold professional development and coaching to meet the professional development needs of teachers who are at different points in their career pathways.

SMCOE leverages multiple funding sources to support workforce development: the Workforce Pathways Grant, Early Education Teacher Development Grant, UPK Planning and Implementation, Multilingual Learner Grant, Quality Counts CA grants, ECAP, Inclusive Early Education Expansion Program, and F5 local funding.

### [ECE Education Overview](#)

College completion of both Associate of Arts (AA) or Associate of Sciences (AS) two-year degrees and, Bachelor of Arts (BA) or Bachelor of Sciences (BS) four-year degrees, for lead teachers in classrooms with children 0 to 5 years old, is one of the most critical determinants of program quality. College

coursework in ECE or Child Development is linked to higher quality classrooms and must also be paired with observation, guided experiences with young children, mentoring, and of course, a temperament suited to working with young children.

BA/BS achievement for designated lead teachers in San Mateo County's early childhood programs will support the goals of addressing quality improvement and increasing access to quality programs for San Mateo County's youngest children.

For the individual, BA/BS completion opens many doors to additional careers with and on behalf of young children. Ensuring that careers and salaries are available that honor and reward BA/BS completion is a critical piece of promoting this achievement.

Because obtaining a college degree in a regionally accredited institution in California requires passage of key general education courses reflecting writing, reading, and comprehension in the English language at the college level, as well as the ability to think critically, compute, conduct research, engage in reflection, and utilize a variety of communication skills and tools, attention must be paid to developing skills in all areas. Employers also play a role in encouraging skill development in the workplace for their employees. A 4-year college degree demands three key components: a major or area of focus (depth), a general education (breadth), and electives that meet specific interest areas. These are achieved throughout the 4-year course of study.

### Requirements and Costs of Degree Completion

Aside from the cost of obtaining an AA/AS or BA/BS, an understanding of the barriers, complications, and reasons why workforce members do not or cannot complete AA/AS or BA/BS degrees are critical. Financial costs are only one barrier, and with significant availability of financial aid, it may not be a primary barrier. Significant barriers include:

1. **Time:** Attending college, especially at the 4-year college level takes significant time, energy, and focus beyond attending courses. Classwork, time spent reading, the time needed to satisfy course additional requirements, time registering for classes and applying to colleges, and applying for community financial support all compete for the limited time available to this heavily scheduled workforce. Workforce members often articulate that they just do not have the time to commit.
2. **Understanding the ECE System:** A truly complicated and ever-changing system of employment credentialing, permitting, testing, certification, licensing, and degree requirements that is difficult to explain and understand makes this sector specifically challenging to describe.
3. **English Language Learners:** Workforce members who speak languages in addition to English are critical to family support in ECE programs. The high level of English language learners (ELL)

working in the ECE field in the SF Bay Area contributes to the quality of programs. ELL students utilize multi-lingual resources, multi-lingual support staff, ELL and ESL academic courses, Adult Education Pathways for English language Learners, and enroll in introductory college content courses and training in key languages (Spanish, Cantonese, etc.). Challenges to BA/BS completion include ensuring that ELL resources are available to workforce members when and where needed along the pathway, as a 4-year degree in California requires college-level English language proficiency.

4. **Wage Levels for BA/BS Degree Holders:** Based on the findings of the Early Childhood Workforce Index; CSCCE; 2020:<sup>44</sup> wages have not increased significantly for the ECE workforce, and while San Mateo County has higher wages than many parts of the SF Bay region, the cost of living is high in the County. A challenge in creating an environment for college success includes providing clear wage increases for degree completion, commensurate with the time and level of commitment needed to complete a 4-year degree and competitive with careers in other areas requiring a BA/BS degree.
5. **This Workforce is Predominately Female:** According to, *Still Underpaid and Unequal*, July 2022, it is estimated that 96.7% of the ECE workforce in this country is female. Understanding the challenges that female workers have in balancing family, caregiving, and household responsibilities with work and school are needed. Supportive and collaborative learning environments are needed to address the challenges of often being the first in their families to attend college while developing English-language skills and maneuvering in an unfamiliar system. Often, modeling educational success for their own children is a motivator, but the realities of family life and multi-generational caregiving responsibilities are also barriers to college completion. The strain of college attendance on families without support is also a hidden cost of college.

## Child Development Permit Trends

Child development permit numbers provide a window into college completion. Permit applications fell statewide during the COVID Pandemic. According to the Commission on Teacher Credentialing (CTC)<sup>45</sup>, new permits (at all levels) issued in California were down by 14.6% in FY 2020-2021. Renewed Permits (at all levels) issued in CA in the same period were up slightly by 3.2%, but renewals do not tend to translate into new staff entering the field. Child Development Permits are an indicator of college enrollment and course completion. At the entry levels, only ECE/CDEV courses are needed, but as candidates progress to Teacher and Master Teacher levels, general education courses are needed, which are related to the completion of AA/AS degree requirements, graduation, and transfer. As

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<sup>44</sup> <https://cscce.berkeley.edu/workforce-index-2020/>

<sup>45</sup> <https://www.ctc.ca.gov/commission/reports/data/edu-supl-child-dev>

evidenced in CTC data through June 30, 2021<sup>46</sup>, the rate of child development permit applications and upgrades fell during the COVID-19 pandemic (in both 2019-2020 and 2020-2021) across California and especially in San Mateo County.

In San Mateo County, during 2019-2020, only 32 child development permits in total were issued and during 2020-2021 only 46 were issued. In contrast, in 2009-2010, 308 permits were issued. Additionally, as typical, the highest number of permit holders in the County are in the Assistant teacher level, reflecting those with 12 units of child development college coursework, but limited general education coursework. The COVID-19 pandemic limited application support and many programs were not fully enrolled or staffed, however, child development permits create a professional ladder of higher education and college course completion and document college attendance and engagement. Low permit application numbers are a troubling harbinger for the 46 state-contracted child development centers and the 10 Head Start sites in San Mateo County, where BA degrees and/or higher-level permits are required for employment as lead or head teachers.

According to the San Mateo County Early Childhood Compensation Study, 2017,<sup>47</sup> the turnover rate for child development staff in San Mateo County is as follows: 24% for teacher aides, 22% for assistants, and 21% for teacher-level staff. Ensuring that college completion efforts result in a workforce that remains in the field in San Mateo County is critical. A challenge to degree completion includes the limited data available on turnover rates in ECE, and what jobs staff move to if they leave the classroom. Understanding the career trajectory of BA/BS holders will help formulate strategies to support them in staying in the field and in classrooms with children. Based on the Seed Workforce Survey, Most workers surveyed, 66% (212/323), plan to stay in the sector in the next 12 months; however, data suggests the demographic most inclined to leave the sector are 18-39-year-olds.<sup>48</sup> For those planning on leaving the field, the reasons cited include 1. Insufficient pay (23); 2. Pursuing career change (14); 3. Insufficient benefits (12); 4. No opportunity for growth (12); 5. Family-related reasons (9); 6. Moving out of the area (7); and 7. COVID-19 Concerns (7).

According to the recently completed Seed Workforce Survey (conducted for this 2022 SMCCC Needs Assessment), of those sampled, 85% resided in San Mateo County (which supports creating robust pathways with local institutions) and 151 of the 323 sampled were over 50 years old. As the workforce age and approach retirement, the likelihood of degree completion is reduced. The Seed Workforce Survey had an approximate response rate of 9.5% (323 of 3,325 Infant and Preschool workforce

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<sup>46</sup> [https://www.childdevelopment.org/docs/default-source/permit-documents/1996-2021-history-of-permits.pdf?sfvrsn=77749238\\_2](https://www.childdevelopment.org/docs/default-source/permit-documents/1996-2021-history-of-permits.pdf?sfvrsn=77749238_2)

<sup>47</sup> [https://www.smcoe.org/assets/files/About\\_FIL/Child%20Care%20Partnership%20Council\\_FIL/San%20Mateo%20ECE%20Teacher%20Compensation%20Study%20wAppendices\\_11.21.17.pdf](https://www.smcoe.org/assets/files/About_FIL/Child%20Care%20Partnership%20Council_FIL/San%20Mateo%20ECE%20Teacher%20Compensation%20Study%20wAppendices_11.21.17.pdf)

<sup>48</sup> See San Mateo County Child Care Workforce Study Report, prepared for San Mateo County Child Care Partnership Council by Seed Collaborative, July 2022. Page 26.

members). A better understanding of the barriers to degree completion from workforce members themselves is needed to assess the costs of completion.

### Accredited ECE or Child Development Degree Programs

For BA completion, students must complete required courses from an accredited college or university in both a major (ECE or Child Development or related degrees) and in general education. Students may complete the first two years at a community college and then transfer to a four-year college. The relatively low cost of community colleges and the wide availability of ECE courses makes this a worthwhile pathway. In general, students can transfer approximately 70 lower division units from a community college to a four-year university and AA/AS degrees typically require 60-75 lower division units. In general, BA/BS degrees require 120-130 total college units and 60-75 must be upper-division units. See **Appendix I** for more discussion of local educational options in ECE.

- **High School Dual Enrollment or Middle College** courses are available in San Mateo County through a partnership between individual school districts and the three area community colleges. This agreement allows high school students to complete free college courses while still enrolled in high school and is a model for accelerated degree completion. Students can complete just one class or a significant portion of a two-year degree while still in high school.
- **Community colleges** offer courses and certificates, often culminating in Associate of Arts (AA) or Associate of Sciences (AS) degrees, representing the first two years of college. Community colleges offer lower division degrees and 85% of California’s ECE/ECDEV workforce has completed courses or started their educations at an area community college. As previously described, there are three community colleges in San Mateo County. Courses are also offered by many community colleges online.
- **Professional development and informal training** cannot be substituted for college coursework in most situations although colleges are increasingly considering both credit-for-prior learning and granting limited college credit for the completion of specific programs. Additionally, work experience, cooperative work experience, and laboratory experiences can often be paired with on-the-job placements to earn college credit. Apprenticeships provide work-based learning, community college courses, and college credit for employment.
- **Four-year Colleges and Universities** offer BA/BS degrees in specialized areas for the ECE workforce, including Child Development, Early Education, and others. Only specific four-year colleges offer a degree in this major. There has been growth in the number of online and out-of-state programs offering related degrees and programs, yet quality and accessibility vary, and ensuring that an institution is accredited is critical.

**Exhibit 4-1** summarizes the local educational costs by type of program and school that are available locally. The average cost per AA/AS and BA/BS is used to estimate the cost of providing additional education to the ECE workforce below. These degrees and schools and their costs are further discussed in **Appendix I**.

### Supports that Lead to BA/BS Degree Completion

The cost of college completion is more than just tuition. College completion by the ECE workforce in San Mateo County is supported through the provision of community programs that provide information, resources, student support, pathway guidance, and create an environment for BA/BS completion including:

1. **Accessing Resources that Support College Completion:** New workforce candidates need job search support, resumes, fingerprinting, and career assistance, including support in understanding educational requirements for jobs with children. New or re-entry students need college application assistance, linkages to higher education professionals, career advising, and guidance in completing and streamlining applications to the Early Care and Education Workforce Registry,<sup>49</sup> the Early Learning and Care Stipend Program, Child Development Training Consortium (CDTC) Scholarships, Free Application for Federal Student Aid (FAFSA), private scholarships, loan forgiveness, and multi-lingual (Spanish, Chinese) navigation support. Currently, these services are available in specific locations but are not easily accessible to all ECE workforce members in all parts of San Mateo County, especially in all relevant languages and in multiple modalities. Local community colleges, four-year universities, the Child Care Coordinating Council, the San Mateo County Office of Education, and other organizations all provide elements of ECE workforce support.
2. **Advising, Counseling, Tutoring, and Career Support:**<sup>50</sup> Local institutions of higher education provide general career advising and academic counseling to support degree completion. As the ECE field is especially complicated and requires a high level of technical knowledge and specificity, the workforce needs frequent check-ins. Campus-based advisors must now provide ongoing professional development support for workforce members to ensure that courses meet graduation, licensing, and transfer goals, in addition to CDEV Permit requirements, and potential credential requirements (especially for the new P-3 credential). Colleges typically need external support and funding to provide the staffing needed for these functions.

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<sup>49</sup> <https://info.caregistry.org/>

<sup>50</sup> Skyline and Cañada both have Program Services coordinators in their child development departments who can help with course guidance in ECE/EDUC, professional growth advising, permit applications, career, and job search, stipend, and scholarship info, and connect to other resources.

**Exhibit 4-1**  
**College Program Costs for BA/BS for Lead Teachers**  
**San Mateo County Child Care Council Needs Assessment 2022**

School	Units or Years Needed	Average Tuition Cost	Cost per Unit or Year	Books, Materials,	Campus Fees	Degree	Notes on Costs (1)	
<b>2-year Public Schools</b>		<b>Units</b>						
Skyline College	70	\$3,220	\$46	\$1,500	\$500	AS	Total cost of AA; excluding housing.	<a href="https://catalog.skylinecollege.edu/current/programs/early-childhood-education-as.php">https://catalog.skylinecollege.edu/current/programs/early-childhood-education-as.php</a>
College of San Mateo	70	\$3,220	\$46	\$1,500	\$500	AA/AS	Total cost of AA; excluding housing.	<a href="https://catalog.collegeofsanmateo.edu/current/programs/">https://catalog.collegeofsanmateo.edu/current/programs/</a>
Cañada College	70	\$3,220	\$46	\$1,500	\$500	AS	Total cost of AA; excluding housing.	<a href="https://canadacollege.edu/ehd/degree.php">https://canadacollege.edu/ehd/degree.php</a>
City College of San Francisco	70	\$3,220	\$46	\$1,500	\$500	AS	Total cost of AA; excluding housing.	<a href="https://www.ccsf.edu/degrees-certificates/child-development-and-family-studies">https://www.ccsf.edu/degrees-certificates/child-development-and-family-studies</a>
<b>4-year Public Schools</b>		<b>Years</b>						
San Francisco State University	2	\$9,072	\$4,536	\$5,000	\$5,000	BA	Tuition only, excludes housing and other basic costs	<a href="https://cad.sfsu.edu/early-care-education">https://cad.sfsu.edu/early-care-education</a>
San Jose State University	2	\$9,072	\$4,536	\$5,000	\$5,000	BA	Tuition only, excludes housing and other basic costs	<a href="https://www.sjsu.edu/education/community/eci.php">https://www.sjsu.edu/education/community/eci.php</a>
Cal State University East Bay	2	\$9,072	\$6,695	\$5,000	\$5,000	BA	Tuition only, excludes housing and other basic costs	<a href="https://www.csueastbay.edu/lis/early-childhood-education.html">https://www.csueastbay.edu/lis/early-childhood-education.html</a>
<b>4-year Private Schools</b>		<b>Years</b>						
Santa Clara University	2	\$113,760	\$56,880	\$5,000	TBD	BS, MA, EdD	Tuition only, excludes housing and other costs	<a href="https://www.scu.edu/cas/child-studies/academic-programs/">https://www.scu.edu/cas/child-studies/academic-programs/</a>
<b>Online Accredited</b>		<b>Years</b>						
National University	2	\$66,600	\$370 per unit	\$5,000	TBD	BA	\$370/unit. 180 units required to graduate. Also has an in-residence requirement; excludes housing	<a href="https://www.nu.edu/degrees/teacher-education/programs/bachelor-of-arts-in-early-childhood-education/">https://www.nu.edu/degrees/teacher-education/programs/bachelor-of-arts-in-early-childhood-education/</a>
Pacific Oaks College	2	\$56,250	\$750 per Credit Unit	\$5,000	TBD	BA, MA	Undergrad Upper Division Courses is \$750/credit hour with 46 transfer credits applied. Leaving 75 credits to obtain; excludes housing	<a href="https://www.pacificoaks.edu/academic-programs/bachelor-of-arts-in-early-childhood-education/">https://www.pacificoaks.edu/academic-programs/bachelor-of-arts-in-early-childhood-education/</a>

Sources: Various college websites; Kathleen White; and Brion Economics, Inc.

3. **The Early Learning and Care Stipend Program:** Currently, entry-level applicants in the Educator Milestone Program can receive up to \$200 for entry-level course completion and BA candidates can receive up to \$600 for BA-level program completion. About 278 individuals participated in the San Mateo County Early Learning and Care Stipend Program in 2020-2021; of those, 77 were working toward degree attainment. The number of workforce members in San Mateo County enrolled in college coursework is likely much higher, but limited funding and funder restrictions limit the reach of the stipend program. **Table 4-8** summarizes the number of participants by learning institution (below).
  
4. **The Educational Support Grant:** The Child Development Training Consortium<sup>51</sup> offers grants of \$48 per unit for workforce members (priority to the currently employed) for the completion of a limited number of community college courses leading to degree completion.

### Lead Teachers' Costs to Complete BA/BS Degrees

As shown in **Table 4-9**, there are currently an estimated 1,873 ECE teachers, including lead teachers, assistant teachers, associate teachers, teacher aides, and support staff, based on the analysis in **Table 4-1a**.

Based on the results of the Workforce Survey conducted for this effort, the level of education is crossed with the type of teacher level and age group. For this analysis, we are focused on teachers serving Infants and Preschool children, or 0 to 4 years old. The education requirements are very different and less for School Age teachers and thus, School Age teachers are not evaluated in this section.

In San Mateo County, of an estimated 624 lead teachers, 328 have been identified as possessing certification below the BA/BS level based on the reported education levels from the Workforce Survey as shown in **Table 4-10**. These data are used to estimate the cost of providing additional education needed, as discussed further below.

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<sup>51</sup> <https://www.childdevelopment.org/>

**Table 4-8**  
**SMC Early Learning and Care Teacher Stipend Program**  
**San Mateo County Child Care Council Needs Assessment 2022**

Educational Institution	Number of Participants
<b>Total Workforce in Stipend Program</b>	<b>278</b>
<b>Total Working towards Degree by Institution</b>	
Arizona State	1
Cañada	17
Cañada and City College	1
Cañada and CSU Fresno	1
Cañada and SFSU	1
Cañada and Skyline	21
Cañada, CSM, and Skyline	1
Chabot	1
City College	9
CSU East Bay	1
CSU East Bay and Saddleback College	1
CSU Fresno and Canada	1
SFSU and Skyline	1
Skyline Community College	6
University of San Francisco	1
Other out of area or state schools	13
<b>Total Working towards BA/BS</b>	<b>77</b>
<b>% Working towards Degree</b>	<b>28%</b>
<b>Other Professional Development Participants</b>	<b>201</b>

Sources: San Mateo County Office of Education; Brion Economics, Inc.

**Table 4-9**  
**Estimated Center-Based ECE Workforce**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Current Estimated Center-Based Staff as of 2022
<b>Estimated Child Care Workforce (Aids &amp; Teachers)</b>	
Teacher Aides & Support Staff (1)	624
Assist./Assoc. Teacher	624
<b>Lead Teachers/Asst. Directors</b>	<b>624</b>
<b>Total Teachers and ECE Staff</b>	<b>1,873</b>

*Note assumes all positions are Full Time Equivalent (FTEs).*

(1) See Table 4-1a for estimate of current ECE workforce.

Sources: San Mateo County, Office of Education; Brion Economics, Inc.

**Table 4-11** estimates the cost of tuition at various education levels, based on the current average achievement reported in the Workforce Survey. The total cost is \$6.86 million, while the average cost per student overall is about \$20,910 in total, including books, materials, and campus fees. Assuming 65% of these students would qualify for financial aid,<sup>52</sup> the net cost of financing teachers’ additional education equals \$2.4 million or about \$7,318 per teacher, on average.

In addition to seeking funding to support the \$2.4 million in college tuition and materials for the BA/BS completion of this workforce, as described above, the conditions need to be developed to ensure that the targeted workforce is encouraged, can, and are willing to complete college.

<sup>52</sup> 64% of community college students in CA are considered economically disadvantaged and eligible for Financial Aid - <https://www.cccco.edu/About-Us/Chancellors-Office/Divisions/Digital-Innovation-and-Infrastructure/research-data-analytics/data-snapshot/student-demographics>

**Table 4-10**  
**Estimate of Current Teaching Staff Needing BA/BS**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Infant/Toddler (under 2 Years)	Preschool (2 to 4 Years)	Total 0-5 Year Old Lead Teachers	
Distribution of ECE Teachers (1)	23.0%	77.0%	100.0%	
Estimated Lead Teachers	143	481	624	
<b>Education Levels by Type of Teacher</b>				
1	Some high school education	3.2%	0.0%	na
2	High school diploma or GED	3.2%	4.8%	na
3	Some college education	22.6%	10.6%	na
4	Associate's degree in Child Development/Early Childhood Education	25.8%	30.8%	na
5	Associate's degree in another field	6.5%	3.8%	na
6	Bachelor's degree in Child Development/Early Childhood Education	9.7%	24.0%	na
7	Bachelor's degree in another field	19.4%	11.5%	na
8	Master's degree in Child Development/Early Childhood Education	6.5%	7.7%	na
9	Master's degree in another field	3.2%	3.8%	na
10	PhD in Child Development/Early Childhood Education	0.0%	0.0%	na
11	PhD in another field	0.0%	0.0%	na
12	Other	0.0%	2.9%	na
<b>Estimated Teachers Needing a BA</b>				
1	Some high school education	5	-	5
2	High school diploma or GED	5	23	28
3	Some college education	32	51	83
4	Associate's degree in Child Development/Early Childhood Education	37	148	185
5	Associate's degree in another field	9	18	28
<b>Total Lead Teachers Needing BA</b>				
		<b>88</b>	<b>240</b>	<b>328</b>
<b>Percent of Total Lead Teachers</b>				
		<b>61%</b>	<b>50%</b>	<b>53%</b>

(1) From the Workforce Survey conducted for the 2022 Needs Assessment in "San Mateo County Child Care Workforce Study Report" prepared for San Mateo County Child Care Partnership Council, prepared by Seed Collaborative (Final Report July 2022). Distribution of staff by education levels.

Sources: Seed Collaborative; Brion Economics, Inc.

**Table 4-11**  
**Estimated Educational Costs of BAs for Lead Teachers and Current Education Level**  
**San Mateo County Child Care Needs Assessment - 2022**

Item	Total 0-5 Year Old Lead Teachers	Cost to AA/AS in ECE (1)		Cost to BA/BS (2)		Total Cost to BA/BS	Average Cost to BA/BS
		Units to AA/AS	Costs at \$74.57 per Unit (w books/fees)	FT Years to BA/BS	Cost at \$9,536 per Year (w books/fees)		
1 Some high school education	5	70	\$24,134	2	\$88,179	\$112,313	\$24,292
2 High school diploma or GED	28	70	\$144,804	2	\$529,071	\$673,875	\$24,292
3 Some college education	83	47	\$291,676	2	\$1,587,214	\$1,878,891	\$22,577
4 Some AA or ECE/CD Education	185	9	\$124,118	2	\$3,527,143	\$3,651,260	\$19,743
5 AA in another field	28	9	\$18,618	2	\$529,071	\$547,689	\$19,743
<b>Total Lead Teachers Needing AA/BA</b>	<b>328</b>		<b>\$603,350</b>		<b>\$6,260,678</b>	<b>\$6,864,028</b>	<b>\$20,910</b>
Less Financial Aid at 65%						<b>(\$4,461,618)</b>	
<b>Total Cost after Financial Aid</b>						<b>\$2,402,410</b>	<b>\$7,318</b>

Note: Based on average costs at local community colleges and universities. See Exhibit 4-1 and Appendix F.

(1) The actual cost per unit for community colleges in California is \$46 per unit; the additional costs are fees and books/materials.

(2) Costs include fees, books and materials.

Sources: Kathleen White; Brion Economics, Inc.

## Recent Nanny Survey

In Spring 2022, a survey was conducted for the San Mateo County Child Care Partnership Council (CCPC) by The Institute for Families and Nannies (TIFFAN) titled *Building the Supply of Quality Childcare: A Survey of Nannies Living and/or Working in San Mateo County*. Nannies are members of the license-exempt child care workforce. TIFFAN conducted this survey for CCPC to better understand the demographics and needs of this segment of the workforce and to evaluate nannies’ current level of job satisfaction, education, employment opportunities, and support available. The survey was conducted between March to May 2022; 121 nannies living and/or working in SMC responded to the survey. The key findings are summarized below.

- Nannies are committed to their profession: 46% of respondents have worked 11 years or more and 92% have worked 6 years or more as a nanny.
- The survey showed 79% were foreign-born (with 70% of these nannies speaking Spanish as their primary language) compared to 21% US-born; only 35% have college degrees and 65% have less than 2-years of higher educational attainment. The foreign-born nannies were more likely to have a high school education or less.
- Over half of the respondents said they were unsatisfied with their current opportunities for professional growth, job training, and higher education.

- Over 91% said they wanted certification, mentoring, tech support, and training in order to reach licensed care standards.
- The foreign-born nannies had a higher level of interest in job training, mentoring, and credentialing than U.S.-born nannies, with an average of 83% compared to 55% respectively.

The survey found that 98% of nannies who work in SMC also live in SMC mainly because they prefer to work close to home and find that sufficient jobs are available. They also find work in cities within the County that are not considered high-income. Nearly half (46%) of survey respondents work in cities where family incomes are below the County average. The cities with the highest number of nannies completing the survey were Redwood City (31), Menlo Park (18), and San Mateo (16).

Recommendations based on the survey findings include supporting the nannies' overwhelming interest in job training, education, certification, and mentoring, by developing bilingual programs with mentoring and tech support that are offered during the evenings and on weekends, using content unique to nannying based on knowledge from nannies "in the field." TIFFAN found a need to continue to gather data on this segment of the workforce to inform public policy and child care initiatives to meet the growing demand for quality child care. Lastly, TIFFAN recommends promoting existing resources that exist through the 4Cs, community colleges, and nonprofit organizations.

## Child Care Economic Benefits on the Local Economy

In January 2022, a study of the *Economic Impacts of Infant and Toddler Care in San Mateo County* was prepared by Anna Powell and the San Mateo County Child Care Partnership Council at the San Mateo County Office of Education.<sup>53</sup> The key findings and data are compiled from pre-COVID-19 Pandemic assessments. The economic multiplier factor cited in this study is used to estimate the economic impact of increasing wages for ECE workers below.

### Key Findings:

- A 2019 study concludes that every \$1 spent in child care in CA generates \$1.88 in increased economic activity.

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<sup>53</sup> Anna Powell, "The Economic Impacts of Universal Infant-Toddler Care: An Analysis for San Mateo County" (San Mateo County Office of Education, First 5 San Mateo County, January 2022).

- The gross receipts of a mixed delivery system of child care for 0 to 2-year-olds in San Mateo County total \$54.2 million per year<sup>54</sup> and generate approximately \$101.9 million in regional economic activity in the ECE sector.
- About 15,500 working parents would benefit from a universal Infant-Toddler child care program in SMC, and at least 550 mothers could enter the workforce creating a downstream benefit to earnings of \$203.7 million per year of public investment.<sup>55</sup>
- Access to stable Infant/Toddler child care would improve the productivity of working parents by \$23.3 million per year.<sup>56</sup>

### Economic Benefits of Increasing Child Care Workforce Wages

As discussed above, current child care workforce wages are significantly lower than the actual cost of living or a living wage in San Mateo County. **Table 4-12** summarizes the current ECE wages based on average reported wages by type of ECE staff and the increased wages that would be needed to bring current ECE staff to a living wage. As shown and discussed earlier in this chapter, current ECE wages in the County are estimated at \$253.5 million. The gap in living wages is estimated at \$442.1 million for a total of \$675.7 million. Assuming the multiplier discussed above of \$1.88 for every dollar spent in ECE, the current economic benefit of current wages is \$476.6 million per year or a net additional benefit of \$223.11 over direct wages.<sup>57</sup> The living wage gap, if fully funded would generate an additional \$371.5 million in additional economic benefit. In total, if all ECE staff in the County received a living wage, the economic benefit to the County would be \$1.27 billion annually. The increase in wages estimated equals a 167% increase over current conditions (see **Table 4-4** for more detail).

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<sup>54</sup> Anna Powell, Sarah Thomason, and Ken Jacobs, “Investing in Early Care and Education: The Economic Benefits for California” (University of California, Berkeley: Center for Labor Research and Education, May 2019). For details on methodology on baseline assumptions, refer to the final section of this memo, Page 1.

<sup>55</sup> Ibid. See Page 9.

<sup>56</sup> Ibid. See Page 9.

<sup>57</sup> This factor is the child care industry multiplier for the State of California and is not San Mateo County specific.

**Table 4-12**  
**Estimated Economic Multiplier Effect/Benefit of Current Child Care Industry Wages**  
**San Mateo County Child Care Council Needs Assessment 2022**

Item	Current Annual Child Care Wages	Current Living Wage Gap in Wages	Total Living Wages with Increase (Current)
	<i>(in millions of dollars)</i>		
<b>Total Wages</b>	\$253.5	\$422.1	\$675.7
Multiplier Factor (1)	\$1.88	\$1.88	\$1.88
<b>Total Economic Benefit</b>	<b>\$476.63</b>	<b>\$793.60</b>	<b>\$1,270.24</b>
Net Increase in Benefit	\$223.11	\$371.47	\$594.58

(1) See <https://laborcenter.berkeley.edu/investing-early-care-education-economic-benefits-california/> pg. 16 and Anna Powell, “The Economic Impacts of Universal Infant-Toddler Care: An Analysis for San Mateo County” (San Mateo County Office of Education, First 5 San Mateo County, January 2022).

Sources: Anna Powell, UCB, San Mateo County Office of Education; Brion Economics, Inc.

## 5. School Readiness and Universal Pre-Kindergarten

This chapter focuses on the status of school readiness and Universal Pre-Kindergarten and includes a report on the status of The Big Lift project and kindergarten readiness, as well as Transitional Kindergarten.

### Children’s Kindergarten Readiness and The Big Lift

The local data on children’s Kindergarten readiness and The Big Lift was compiled and provided by Diana Harlick, MPA, Coordinator for Early Learning Initiatives & Evaluation, The Big Lift at the San Mateo County Office of Education.

#### Kindergarten Readiness

Despite San Mateo County being one of the most affluent counties in the nation, 41% of the County’s third graders cannot read proficiently. Of San Mateo County students whose families are economically disadvantaged, 75% percent of third graders are not reading at grade level.<sup>58</sup> Decades of research has shown that increased access to high-quality early learning and care environments can help close some types of early opportunity and academic achievement gaps, especially when early elementary experiences build on and align with approaches in early learning and care.<sup>59</sup> While outcomes vary considerably based on program design and level of resources, many Preschool programs demonstrate short-term impacts on early literacy and math skills, special education placement, and grade retention.<sup>60</sup> Although research is still emerging on the type, amount, and conditions under which widespread access to early learning and care programs can impact long-term outcomes, there is irrefutable evidence that only by intervening early can gaps be disrupted and closed.<sup>61</sup> The narrowing of these early gaps remains the overarching goal of San Mateo County’s collective early learning and care efforts.

In contrast to many other localities, San Mateo County is fortunate to have a rich set of Preschool to third grade (P-3) data that can shed light on the County’s progress toward this goal. These data exist

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<sup>58</sup> <https://caaspp-elpac.cde.ca.gov/caaspp/ViewReportSB?ps=true&lstTestYear=2021&lstTestType=B&lstGroup=3&lstGrade=13&lstSchoolType=A&lstCounty=41&lstDistrict=00000&lstSchool=0000000&lstSubject=e&lstFocus=a>

<sup>59</sup> Duncan, G., Kalil, A., Mogstad, M. & Rege, M. (April 2022). *Investing in Early Childhood Development in Preschool and at Home*. Working Paper 29985. Cambridge, MA: National Bureau of Economic Research. <http://www.nber.org/papers/w29985>

<sup>60</sup> Meloy, B., Gardner, M., & Darling-Hammond, L. (January 2019). *Untangling the Evidence on Preschool Effectiveness: Insights for Policymakers*. Learning Policy Institute.

<sup>61</sup> Reardon, S., Doss, C., Gagne, J, Gleit, R., Jonson, A., Sosina, V. (2018). *Getting Down to Facts II: Technical Report*. Stanford University & Policy Analysis for California Education. <https://cepa.stanford.edu/content/portrait-educational-outcomes-california>

for the seven districts that are part of The Big Lift initiative – with aspirations to expand to serve more districts. The seven Big Lift districts represent the County’s districts with the highest concentration of underserved students, allowing the County to have a nuanced understanding of students and families who live in lower-income communities. As part of The Big Lift’s robust Preschool to third-grade longitudinal data strategy, a universal kindergarten readiness assessment and parent survey are administered annually, and a common literacy assessment is used between kindergarten and second grade.

Fall 2021 data reveal that readiness levels remained relatively stable compared to rates pre-pandemic with 53% of children meeting kindergarten readiness thresholds in 2019 and 55% in 2021 (see right column of **Exhibit 5-1**). The unknown is how readiness levels have been impacted by two significant pandemic-related factors:

1. Attrition due to families leaving the Bay Area; and
2. Delayed entrance into kindergarten due to pandemic conditions (families holding children back).

Future analysis should explore this. This overall rate of readiness is similar to historic rates of readiness in San Mateo County. In other words, overall kindergarten readiness rates have remained relatively static since the County began measuring them approximately two decades ago.<sup>62</sup> **Exhibit 5-1** shows readiness rates for each of The Big Lift school districts in the County. Readiness for most districts increased from 2019 to 2021, with the exception of Jefferson ESD, which experienced a very slight decline. Ravenswood City School District has significantly lower readiness percentages than the other districts at 16% and has experienced no change from 2019 to 2021.

Unsurprisingly, readiness rates vary by student subgroups. **Exhibit 5-2** shows how readiness rates vary by income and Preschool status.<sup>63</sup> In general – and as expected – children with Preschool experience enter kindergarten more developmentally prepared for school, though readiness rates still vary significantly based on income and socioeconomic status. **Independent evaluations of The Big Lift show that children attending The Big Lift Preschool are twenty-two percentage points more likely to be ready for kindergarten than children with no Preschool at all, after controlling for socioeconomic differences.**<sup>64</sup> Across varying types of Preschool experiences (Big Lift and non-Big Lift), there remains a 49 percentage point difference in readiness rates between children who attend Preschool and whose

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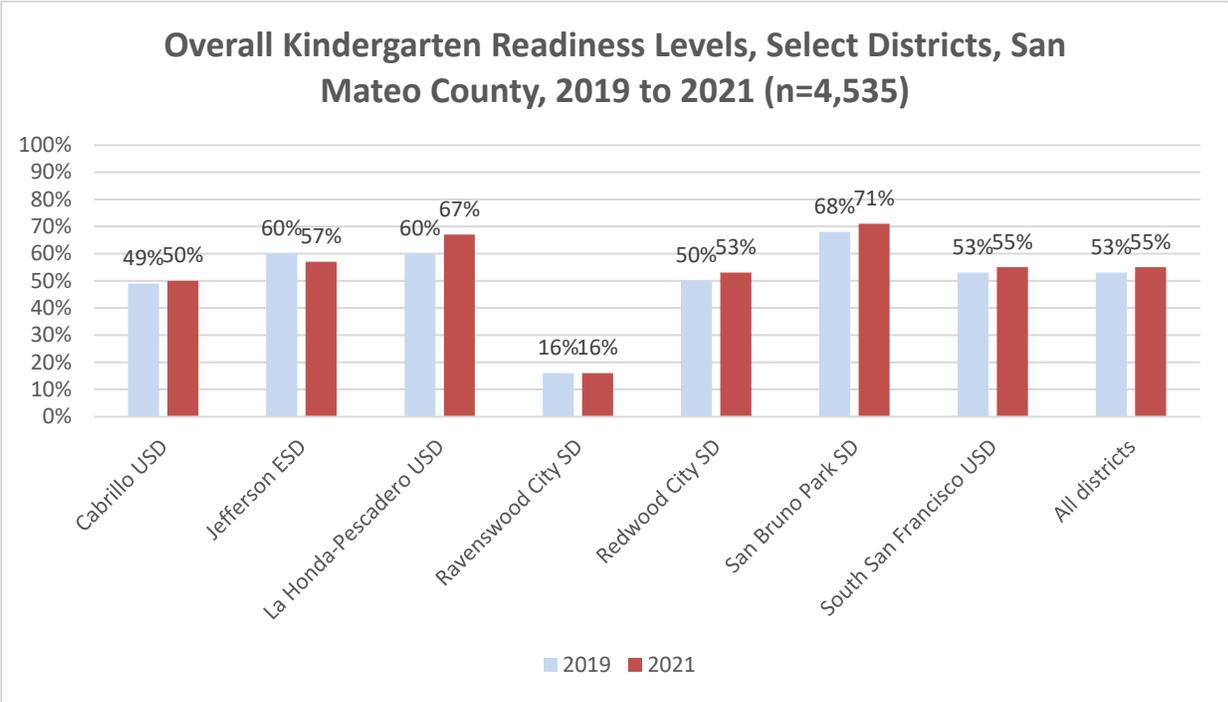
<sup>62</sup> While overall rates have not improved significantly, individual program evaluation allows the County to have insight into which strategies are making a difference in improving rates among student subgroups – see section on Promising Practices for more information.

<sup>63</sup> This encompasses a range of Preschool types, including public, private, full-day, part-day, center-based and home-based.

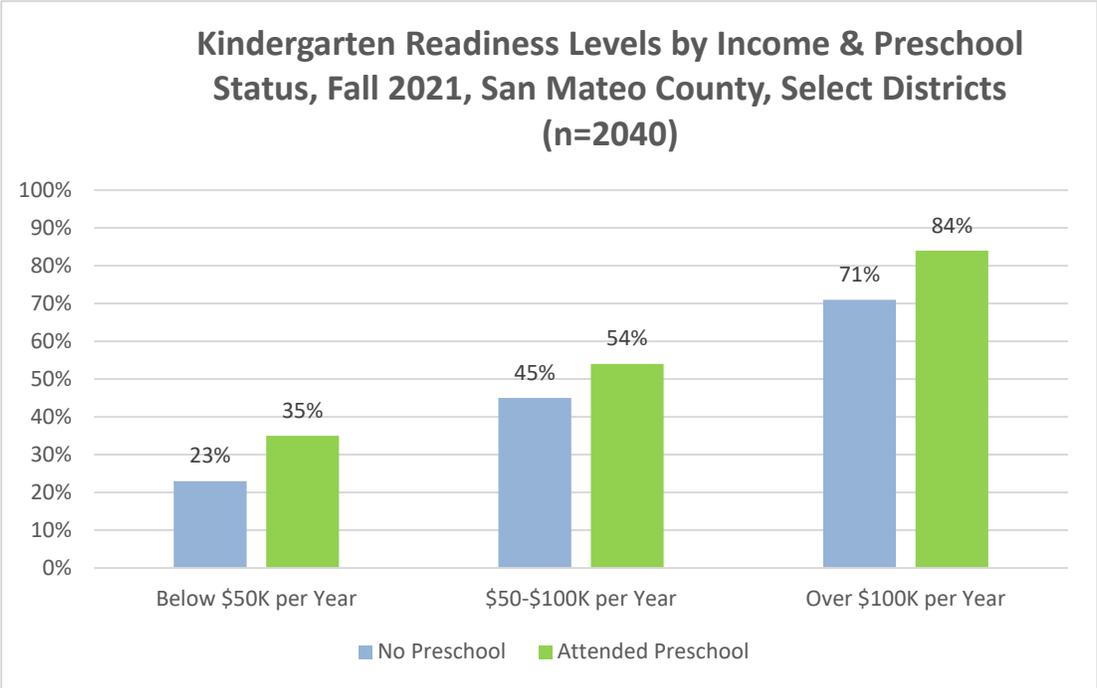
<sup>64</sup> <https://www.smcoe.org/about/county-office-of-education/news/the-big-lift-delivers-on-promise-to-improve-student-outcomes-by-third-grade.html>

families are middle-to-high income and children who attend Preschool whose families are very low-income.

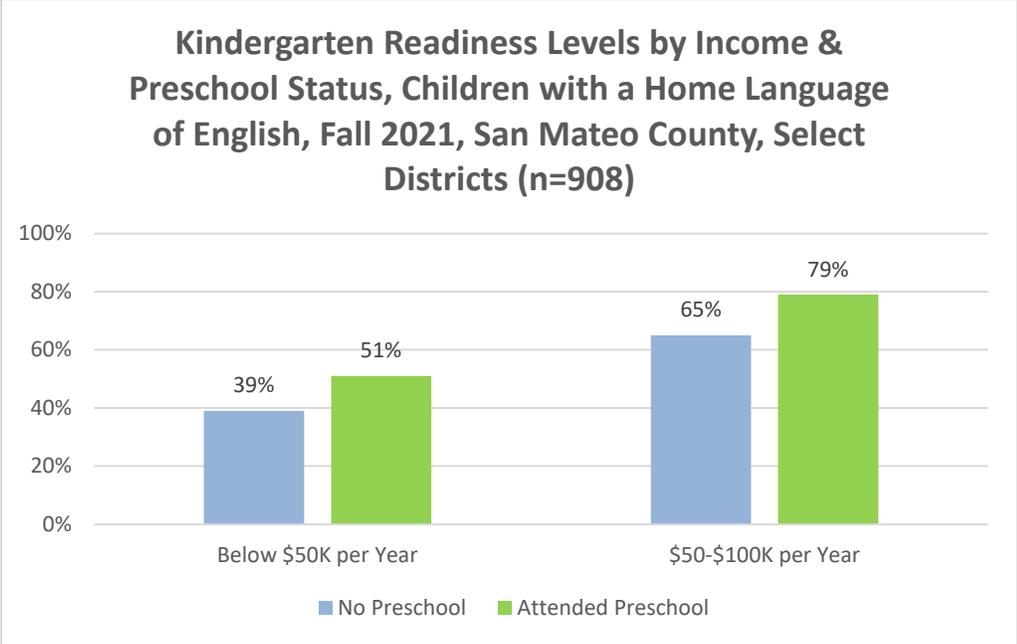
**Exhibit 5-1**



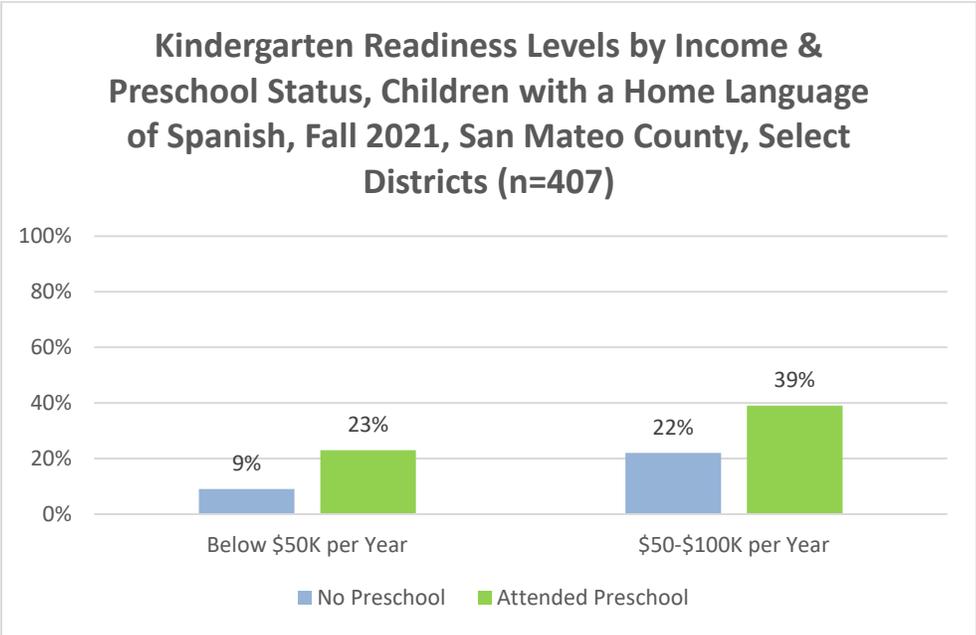
**Exhibit 5-2**



**Exhibit 5-3**



**Exhibit 5-4**



**Exhibits 5-3 and 5-4** (above) show similar breakouts, with the added filter of home language status. For home language, readiness rates are shown for home languages that account for 5% or more of the student population. In The Big Lift districts, these languages are English (59%) and Spanish (30%). On the surface, available data indicate that Spanish-speaking dual-language learners benefit considerably

from their Preschool experiences in San Mateo County. This has been confirmed separately in an independent evaluation of The Big Lift, which shows that dual language learners in San Mateo County who have attended The Big Lift Preschool have English reclassification rates later in elementary school that are twice (31%) as high as dual language learners with no Preschool experience (15%).<sup>65</sup>

### Kindergarten Readiness Subdomains

Subdomain data provide critical insight into areas of strength and challenge for incoming kindergartners in San Mateo County and can inform how investments and interventions should be targeted.

When looking at the most vulnerable students – those from homes with family incomes under \$50,000 annually – we can see relative areas of strength in the areas of physical and social-emotional development both for children with and without Preschool (see **Exhibit 5-5**). At the same time, we see challenges in the subdomains of language and academic-cognitive (early math and literacy) development.

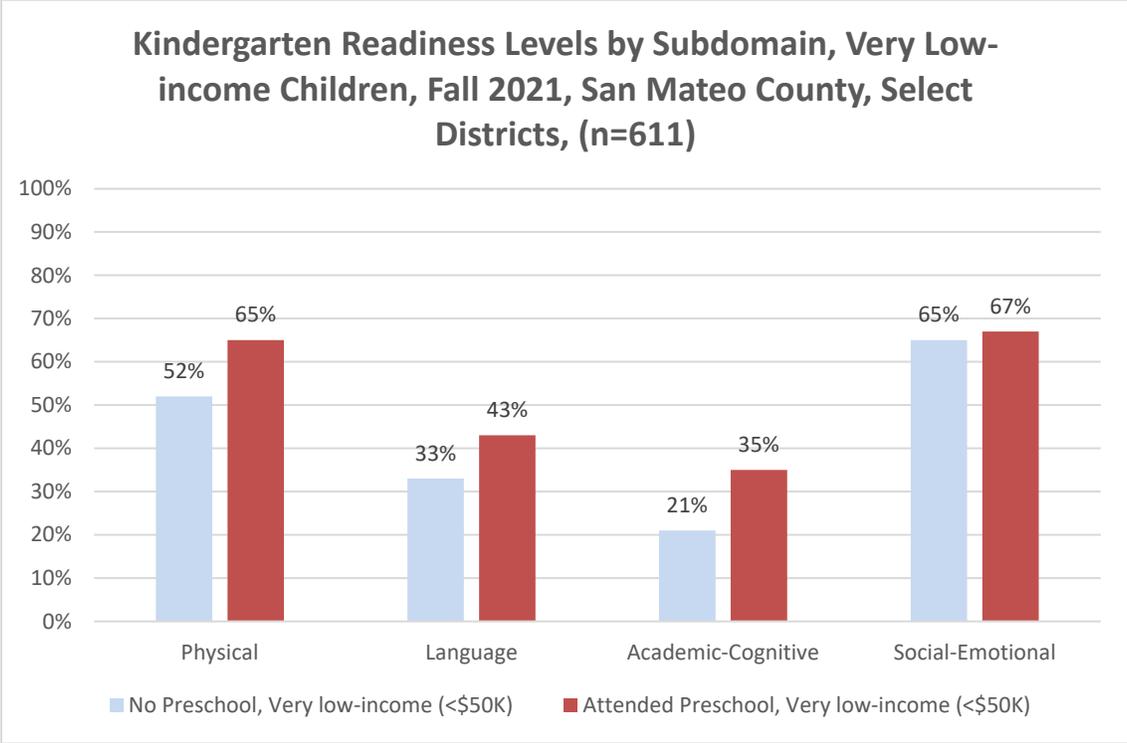
Trends are similar for families with incomes higher than \$50,000 annually, though children from higher income families are faring notably better in all domains regardless of Preschool status (see **Exhibit 5-6**).

It is important to note that the data above compare only two or three dimensions at a time, and do not constitute a rigorous analysis of San Mateo County kindergarten readiness data. While still highly informative for early learning stakeholders, funders, policymakers, and the community at large, analysis that controls for multiple family and child characteristics at once (similar to The Big Lift study cited above) is necessary to glean further insight from these data.

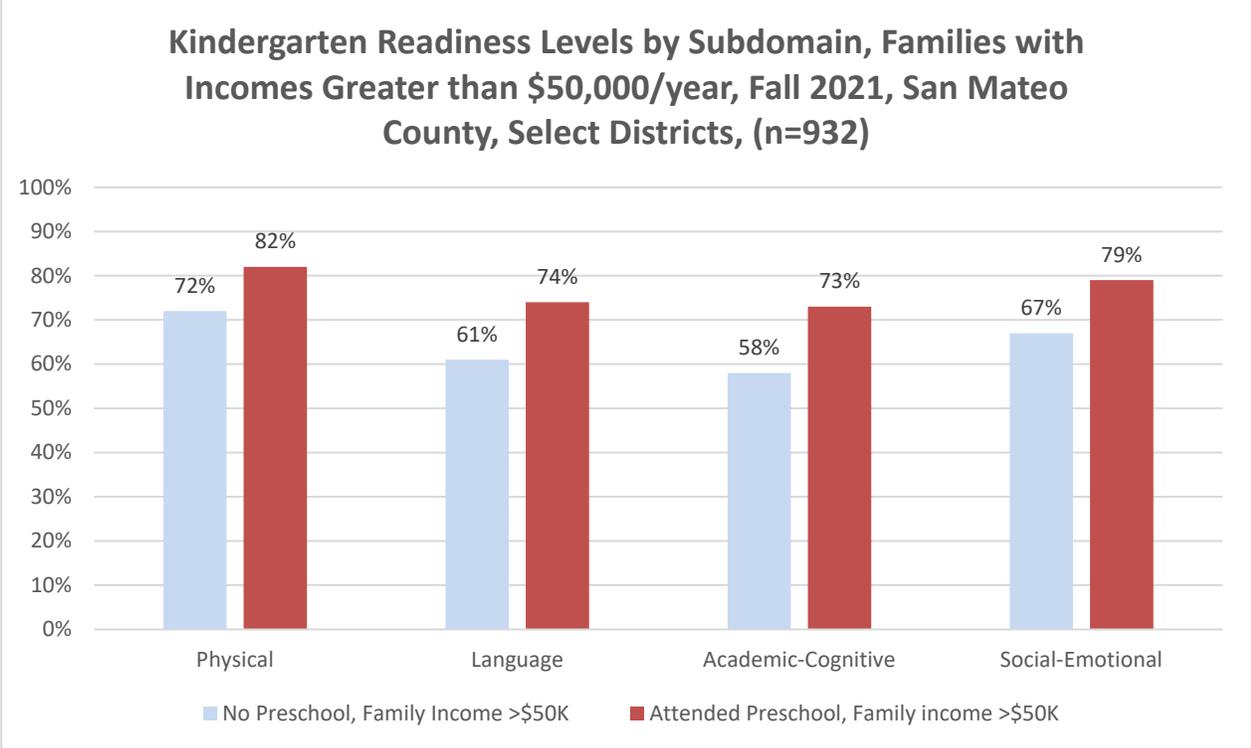
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<sup>65</sup> Gomez, C.J., Cannon, J.S., & Bongard, M. (2021). *The Big Lift Evaluation: Research Findings Five Years In*. The RAND Corporation. [www.rand.org/t/RRA1411-1](http://www.rand.org/t/RRA1411-1)

**Exhibit 5-5**



**Exhibit 5-6**

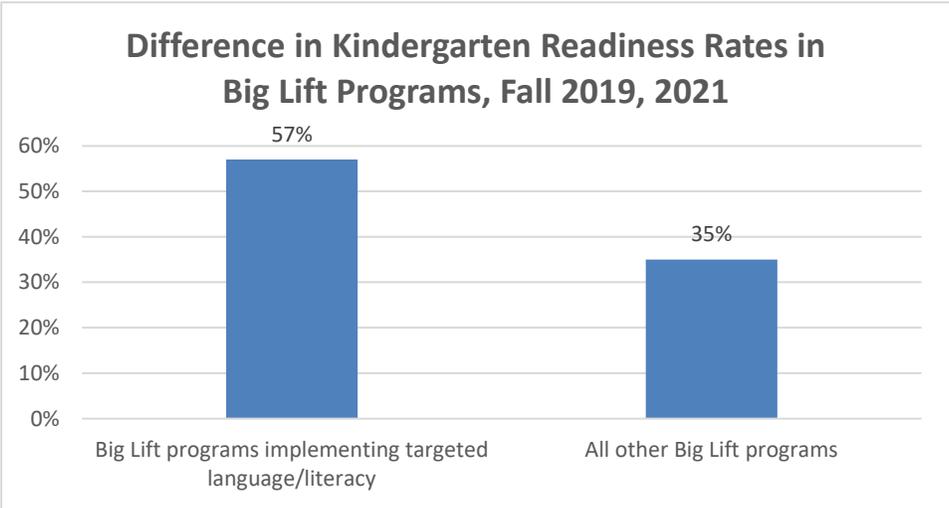


## Promising Early Learning & Care Practices Closing Kindergarten Readiness Gaps

The Big Lift’s robust Preschool to third-grade data strategy allows the San Mateo County community to evaluate the impact of targeted investments and identify scalable opportunities to achieve change for young children. One example of this is multi-year examinations of kindergarten readiness across Preschool programs. Data have revealed that programs employing targeted language and literacy approaches within Preschool, especially those that encompass Response to Intervention (RTI) techniques, have increased kindergarten readiness rates by 22 percentage points, as shown in **Exhibit 5-7**.

Following children until second grade, data show that kindergarten readiness as measured by the Brigance assessment, in turn, preliminarily predicts reading proficiency as measured by Fountas & Pinnell. Based on these data, The Big Lift will be expanding evidence-based language and literacy efforts in Preschool over the next few years with two new national partners.

**Exhibit 5-7**



Local data on the effectiveness of early literacy efforts is encouraging. At the same time, San Mateo County leaders know and understand – and research and local data affirm – that Preschool alone is insufficient to close early opportunity gaps. Whole family supports, especially efforts that link evidence-based approaches across service and school systems, while leveraging the strengths and responding to the challenges of families, are needed. San Mateo County’s emerging Cradle-to-Career initiative will offer the opportunity for County partners and stakeholders to come together to implement coordinated, strategic support across critical junctures in children’s educational pathways.

## Partnership Opportunities – Preschool to Third Grade Data

Opportunities to evaluate the impact of the County’s multiple early childhood initiatives exist within the County’s Preschool to third-grade data approach and are overseen by The Big Lift. Interested San Mateo County partners and stakeholders can reach out to The Big Lift at:

<https://www.thebiglift.org/contact-us/>

To explore San Mateo County kindergarten readiness data in more depth, please see the 2021 Kindergarten Readiness Assessment Dashboard: <https://tinyurl.com/5n86szjy>

## Family Reading Practices

As the birthplace of the now national Raising a Reader program, San Mateo County has long prioritized increasing shared reading at home for young children and their families. Shared reading between children and their caregivers helps build early literacy skills, in particular oral language and print knowledge,<sup>66</sup> and strengthens bonds between children and their caregivers. Across all groups, 70% of families of kindergartners report reading to their children 3 to 4 days per week or more. When broken out by student group (**Exhibit 5-8**), this decreases to 51% for lower-income families with children with no Preschool experience.

## Developmental Screening Rates and Outcomes

Early childhood research and brain science demonstrate that when children’s developmental concerns and special needs are identified as early as possible, intervention will be more effective and less costly.<sup>67</sup> At the same time, national data show that California serves a lower percentage of children with disabilities than the national average across the early intervention, Preschool, and school services systems.<sup>68</sup> One in every six children – or 17% - is estimated to have a developmental disability or delay,<sup>69</sup> yet a local analysis shows that only 6% of children ages 0 to 5 in San Mateo County are receiving early intervention services.<sup>70</sup> Developmental screening is one mechanism by which children’s developmental concerns and special needs can be identified and addressed earlier. Developmental

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<sup>66</sup>Lonigan, C., Shanahan, T., & Cunningham, A. (2008) *Chapter 4: The Impact of Shared Reading Interventions on Young Children’s Early Literacy Skills*, as found in *Developing Early Literacy: A Report of the National Early Literacy Panel*, National Institute for Literacy and National Center for Family Literacy.

<sup>67</sup> Center on the Developing Child at Harvard University. (2008). *InBrief: The Science of Early Childhood Development*. <https://developingchild.harvard.edu/resources/inbrief-science-of-eecd/>

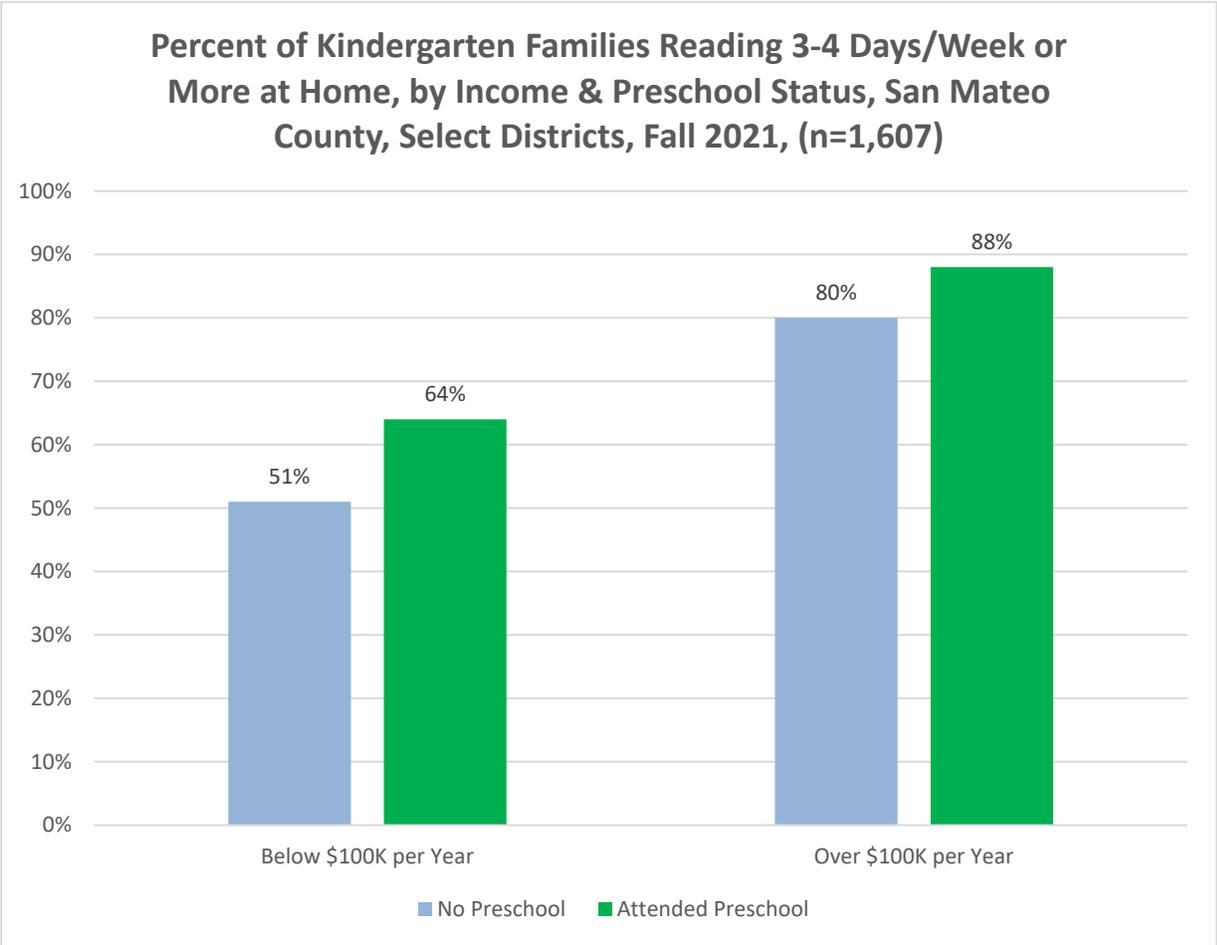
<sup>68</sup> Stipek, D., and colleagues. (2019). *Getting Down to the Facts II: Early Childhood Education in California, Technical Report*. Stanford University & Policy Analysis for California Education. [https://gettingdowntofacts.com/sites/default/files/GDTFII\\_Report\\_Stipek\\_v2.pdf](https://gettingdowntofacts.com/sites/default/files/GDTFII_Report_Stipek_v2.pdf)

<sup>69</sup> Zablotsky B, Black LI, Maenner MJ, Schieve LA, Danielson ML, Bitsko RH, Blumberg SJ, Kogan MD, Boyle CA. *Prevalence and Trends of Developmental Disabilities among Children in the United States: 2009-2017*. *Pediatrics*. 2019 Oct;144(4):e20190811. doi: 10.1542/peds.2019-0811. PMID: 31558576; PMCID: PMC7076808.

<sup>70</sup> First 5 San Mateo County & Oku, Cheryl. (March 2021). *The Early Identification and Intervention System in San Mateo County: An Environmental Scan*.

screening refers to the systematic use of a standardized, validated tool to identify the risk for developmental delays. Developmental screening is not diagnostic but helps determine if there is a need for further evaluation.

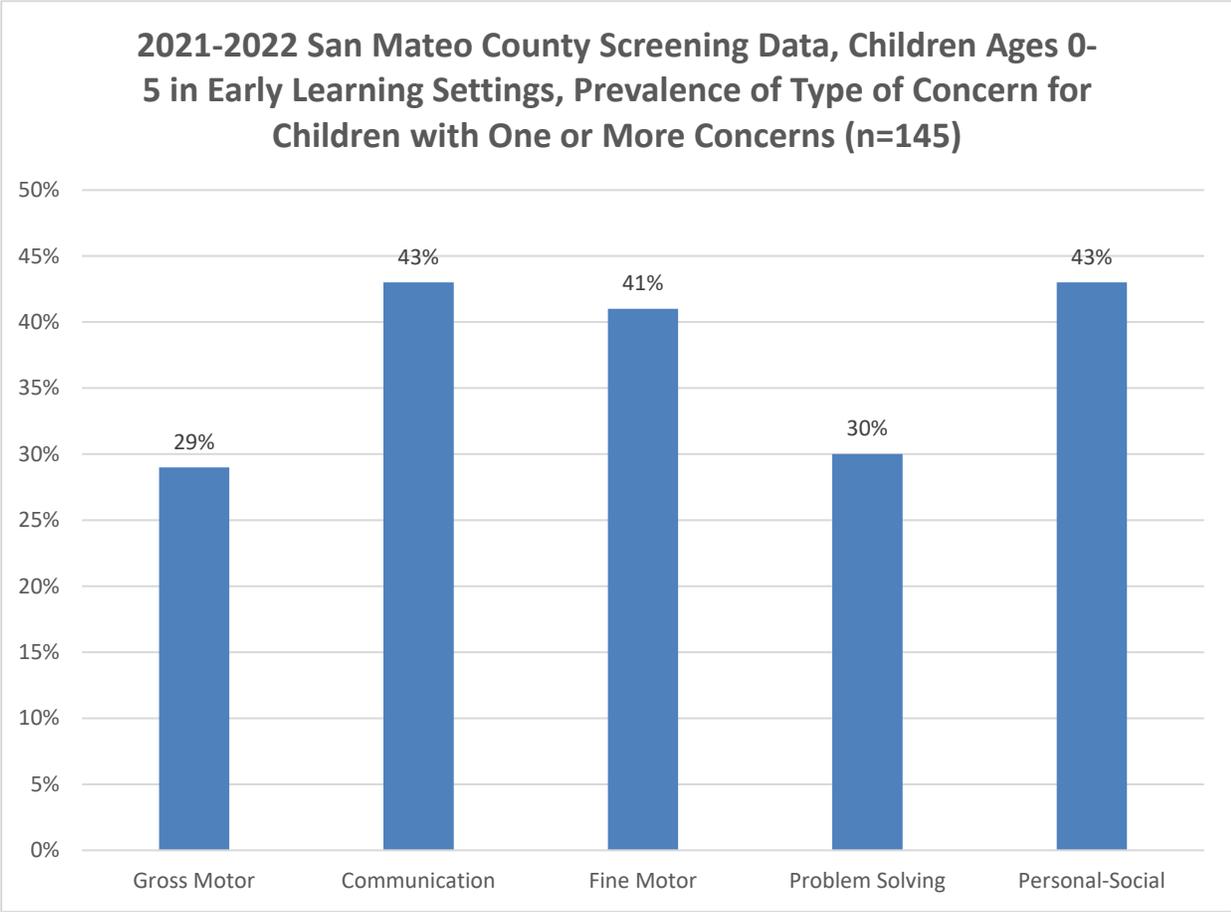
**Exhibit 5-8**



While many children receive developmental screening through their primary care provider, early learning and care settings provide another opportunity to achieve universal access to developmental screening. California’s Quality Rating & Improvement System (QRIS), or Quality Counts, has established developmental screening as a program quality standard statewide, resulting in a substantial increase in developmental screening among San Mateo County’s early learning and care programs. The QRIS establishes the Ages & Stages Questionnaires as the required tool at the higher quality tier levels; the ASQs are established, valid, and reliable, parent-completed developmental screening tools. Within The Big Lift programs, ASQ screening rates for the approximately 1,800 children served annually increased from 55% in 2016 to 89% in the school year 2021-2022, significantly increasing the likelihood of children’s concerns being identified and treated before kindergarten.

Through The Big Lift, San Mateo County also has a centralized database for screening data, the Online ASQ. The Online ASQ houses screening data across multiple partner agencies and initiatives in San Mateo County, including The Big Lift, QRIS, other public and private early learning and care programs, and the Help Me Grow initiative. The goal of the Online ASQ is to have one location for screening data for children ages 0 to 5 in San Mateo County. In the school year 2021-2022, screening data were available for 701 children ages 0 to 5 enrolled in early learning and care settings. About 21% of children had developmental concerns in one or more areas. For children with concerns, 46% had concerns in two or more areas. The developmental areas with the highest frequency of concerns were Communication (43%) Personal-Social (43%), and Fine Motor (41%) (see **Exhibit 5-9**).

**Exhibit 5-9**



### Pandemic Impacts on Families and Learning Loss in Children

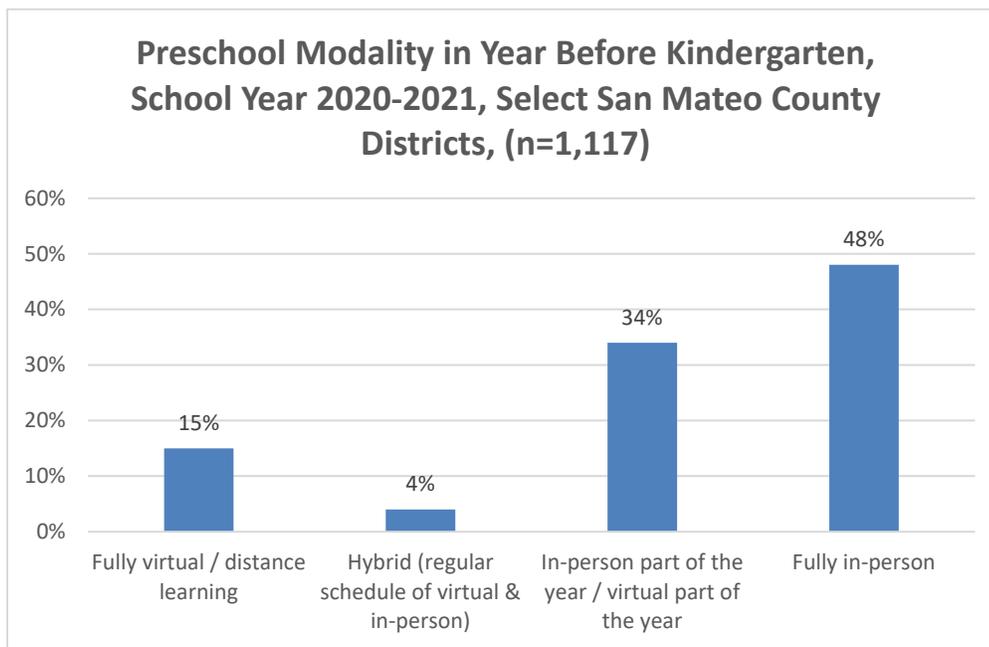
The local data on the pandemic’s impact on families and learning loss in children was compiled and provided by Diana Harlick, MPA, Coordinator for Early Learning Initiatives & Evaluation, The Big Lift at the San Mateo County Office of Education. The Big Lift’s seven district Preschool to third-grade data

also allow San Mateo County to understand some of the COVID-19 pandemic’s impact on young children and their families, both in terms of overall well-being and access to Preschool. Here again, data are available for nearly all families (of all demographics) served in those districts.

### Preschool Enrollment & Type

Family data reveal a 13% drop in Preschool enrollment for incoming kindergarten families compared to before the pandemic. In Fall 2021, 69% of incoming kindergarten families reported that their children had received at least one year of Preschool, compared to 82% before the pandemic. Among children with Preschool experience, **Exhibit 5-10** shows the Preschool modality children received given ongoing pandemic conditions.

#### **Exhibit 5-10**



### Family Well-Being

Available data also reveal the pandemic’s overall effects on family well-being. Across the seven districts for which data are available, there were widespread, significant impacts on family well-being.

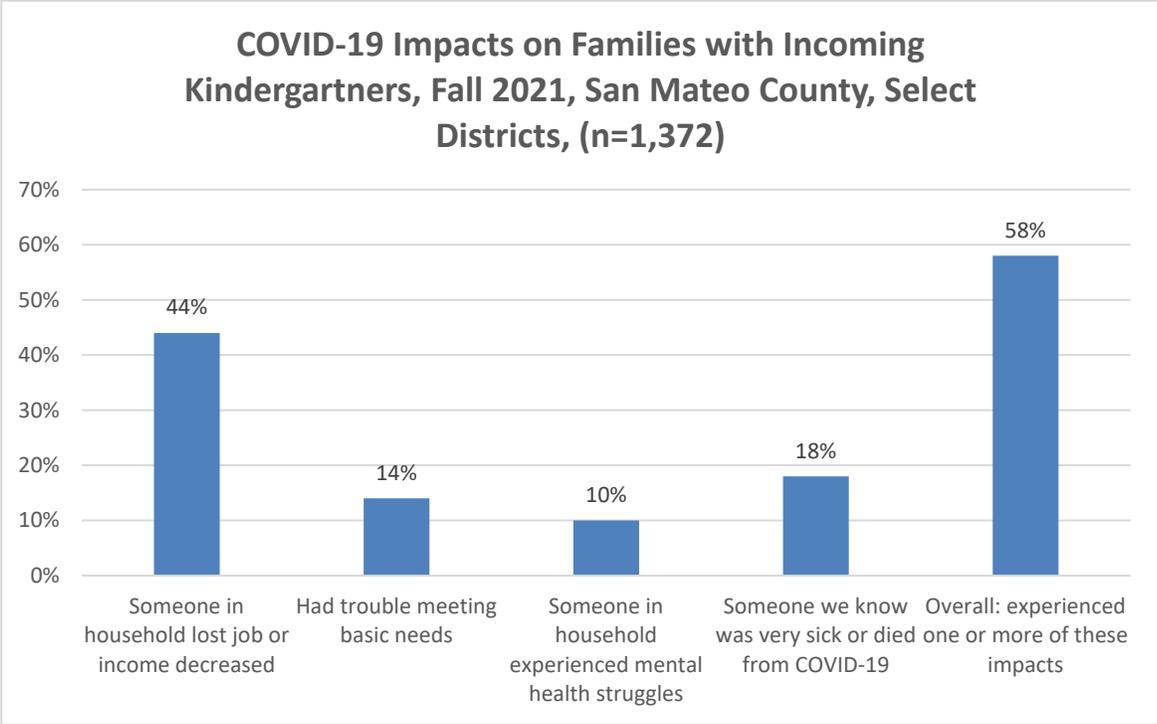
As shown in **Exhibit 5-11**, fully 58% of incoming kindergarten families in the seven districts experienced one or more of the following impacts: job or income loss (44%), trouble meeting basic needs (14%), mental health struggles (10%), and knowing someone who was very sick or died from COVID-19 (18%). Future longitudinal studies in San Mateo County can potentially examine the long-term impacts.

### School-Community Attachment

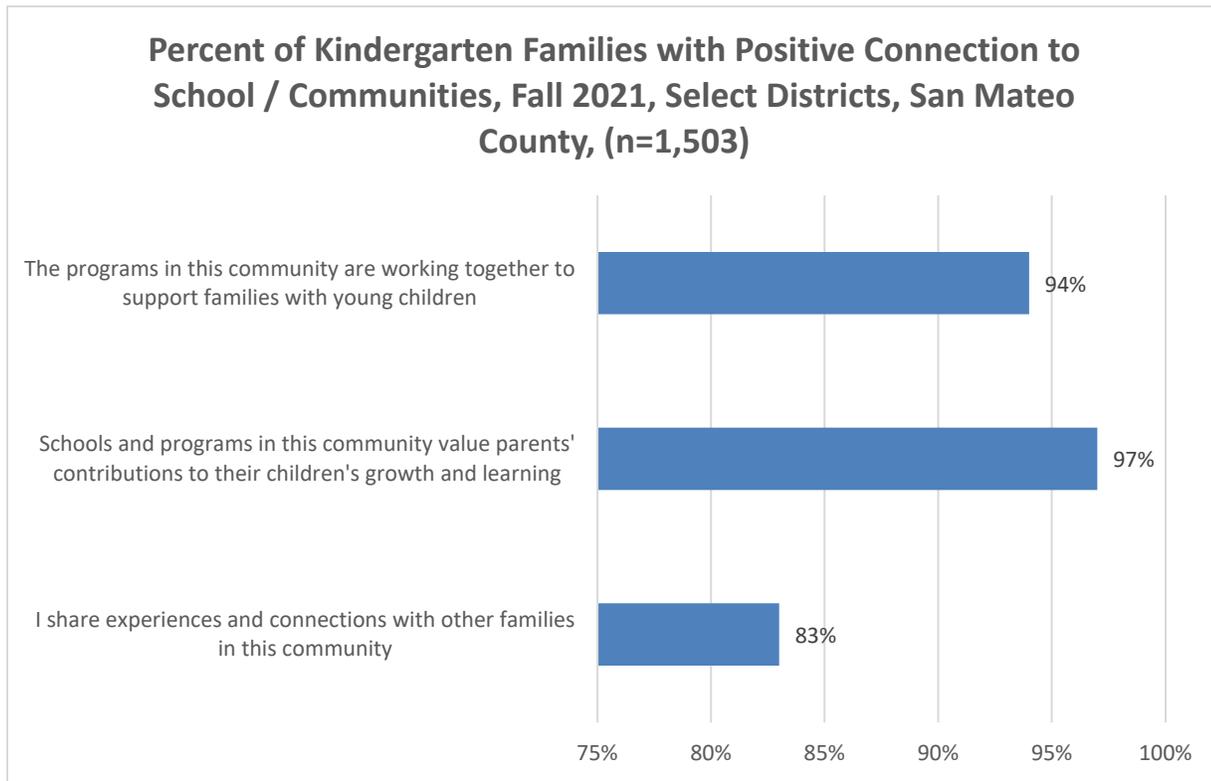
San Mateo County has many assets to build on when it comes to school and community connections. Families of young school-age children overwhelmingly feel positively connected to their schools and to their community.

About 97% of kindergarten families feel schools and programs in their community value parents’ contributions, and 94% feel the community is working together to support families with young children. There is generally not much variation among districts, though there is some slight variation for the question related to shared experiences and connections (see **Exhibit 5-12**).

**Exhibit 5-11**



**Exhibit 5-12**



### Children’s Pandemic Learning Loss from Workforce Survey

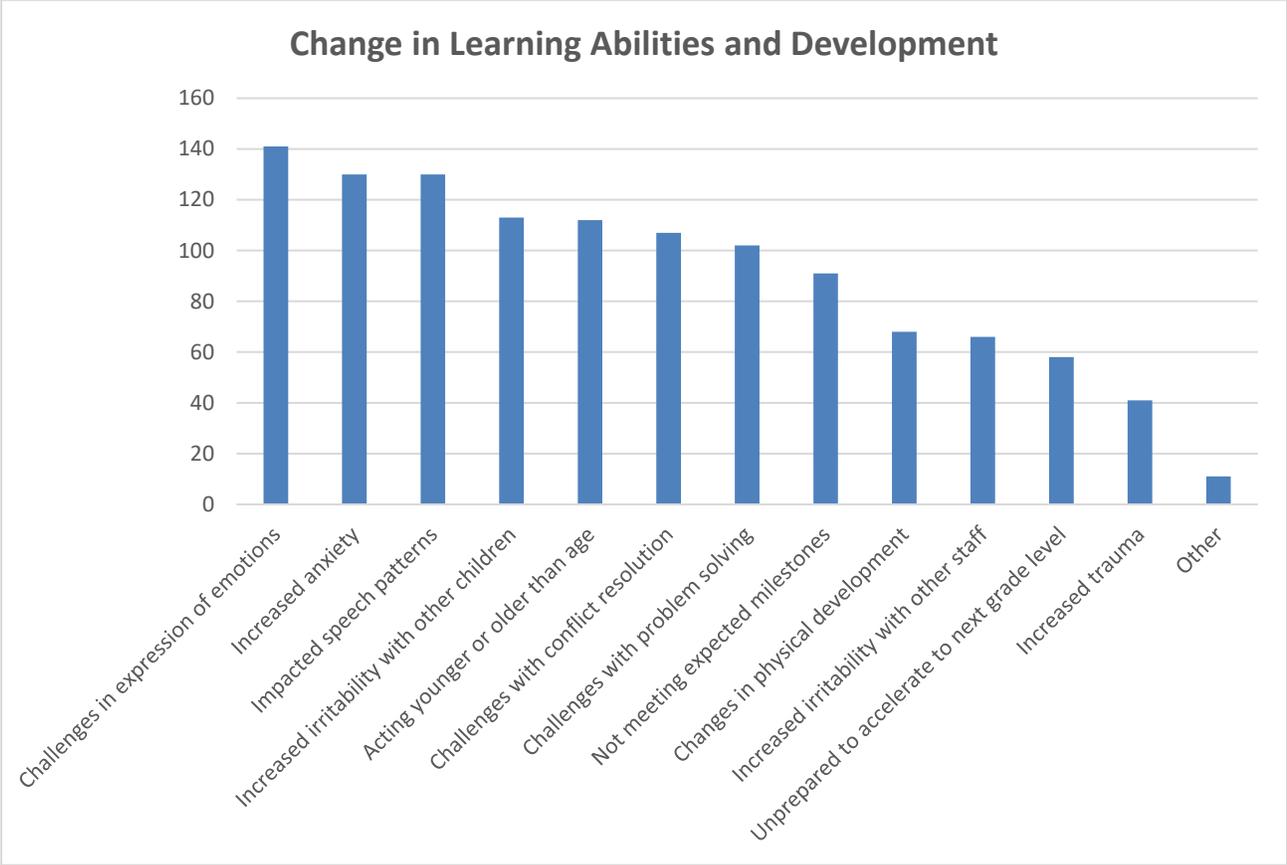
Child Care providers have reported significant changes in children’s learning ability since the beginning of the COVID-19 Pandemic (see **Exhibit 5-13**). Providers and child care staff that participated in the Workforce Survey for this Needs Assessment study reported:<sup>71</sup> Children are showing up developmentally younger than their actual age. Some of these changes included:

- Challenges with problem-solving (i.e., talking with each other to resolve conflict; sharing objects; expressing feelings);
- Lagging social/emotional development, including emotional expression;
- Lagging motor development including balance;
- Challenges with clarity of speech; and,
- Noticeable stress and anxiety in children; some workers noticed that parental stress may have been transferred to the children.

<sup>71</sup> See San Mateo County Child Care Workforce Study Report, prepared for San Mateo County Child Care Partnership Council by Seed Collaborative, July 2022.

Some workers expressed that with smaller classroom sizes (i.e., small teacher-to-student ratios), they can provide better support and attention to students. Most workers (66% or 214 of 323) have noticed changes in child development as a result of the COVID-19 pandemic. These changes are shown in the chart below.

**Exhibit 5-13**



### Transitional Kindergarten

In December 2020, California released its Master Plan for Early Learning and Care<sup>72</sup> which provides a roadmap for improving the state’s early learning and care system over the next ten years. One of the strategies in the Master Plan is to offer Universal Preschool for all three- and four-year-olds. To implement this strategy, the state is beginning by building from the existing Transitional Kindergarten (TK) program. TK is optional and voluntary – parents can choose to keep their child home or enroll in Preschool, Head Start, or other child care. The state considers TK one option among many to achieve Universal Pre-Kindergarten - defined as a quality learning experience in the year before Kindergarten -

<sup>72</sup> <https://californiaforallkids.chhs.ca.gov/home>

for all four-year-olds. For families who need full-day services, TK can be combined with either a Preschool or after-school program.

Prior to 2020, California’s TK program served children who turned five between September 2 and December 2 of a given year. Beginning in FY 22-23, the state is expanding age eligibility for TK so that by FY 25-26 all four-year-olds will be eligible for TK in their school district. In FY 22-23, the state has increased funding to bring the adult-to-child ratio down to 1:10.

By August 2023, TK teachers (assigned to TK after July 2015) must have either 24 units of ECE, a child development permit, or professional experience comparable to the 24 ECE units as determined by their employer. A Preschool teacher with a bachelor’s degree can be the lead teacher for a TK classroom if they enroll in a credentialing program and get a Professional Internship Permit (PIP) or Substitute Teacher Incentive Program (STIP).

On Census Day for the 2020-2021 school year, 772 children,<sup>73</sup> or 35% of all eligible four-year-olds<sup>74</sup>, were enrolled in Transitional Kindergarten across all of the school districts in San Mateo County. For this Needs Assessment, it is assumed that not all eligible four-year-olds would utilize a TK space, based on the current uptake of TK.

**Table 5-1**, below, summarizes data from 2020, including the number of three- and four-year-olds in San Mateo County, the number of children who are income eligible for CSPP, the number who were served in CSPP, the number enrolled in TK, and the number who are served through a different state subsidy such as CalWORKs Stage 2 and 3, or Alternative Payment program vouchers, shown in the last column.<sup>75</sup>

In 2020, only 11% of three- and four-year-olds in San Mateo County had access to a State Preschool, Transitional Kindergarten, or other state-subsidized Preschool space. The state hopes that serving more four-year-olds in TK will make more subsidized Preschool spaces available for three-year-olds.

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<sup>73</sup> <https://www.cde.ca.gov/ds/ad/filestkdata.asp>

<sup>74</sup> According to [elneedsassessment.org](http://elneedsassessment.org), 2020 ACS 5-year estimates, there were 8,738 four-year-olds. One-quarter of these – 2,185 – would be eligible for TK in 2020-2021.

<sup>75</sup> California Early Learning Needs Assessment Tool (CELNAT).

**Table 5-1  
 Children Eligible for CSPP and Served in Transitional Kindergarten (TK)  
 San Mateo County Child Care Council Needs Assessment 2022**

Age	All	Eligible for CSPP*	Served in CSPP*	Served in TK*	Served in Other Subsidy
3-Year Olds	9,357	2,996	346	-	112
4-Year Olds	8,738	2,768	842	772	93
<b>Total</b>	<b>18,095</b>	<b>5,764</b>	<b>1,188</b>	<b>772</b>	<b>205</b>

\*California State Preschool Program and Transitional Kindergarten.

(1) Early Learning Needs Assessment Tool, as of 2020.

Sources: San Mateo County Office of Education; Brion Economics, Inc.

All of the 19 school districts that offer kindergarten in San Mateo County were required to submit their UPK plans to their boards by June 30, 2022. The CCPC compiled a summary of the plans to better understand how TK expansion will be implemented in the County. Fifteen of the districts included an estimate of the number of new TK teachers needed by FY 2025-26. Across these districts, the number of TK teachers needed will grow from 31 in 2020 to 91 in 2026. There is an even greater demand for TK Teachers Assistants – growing from nine in 2020 to 83 in 2026. Sixteen districts provided an estimate of the facilities needed to expand TK - 69% of these districts indicated that they have sufficient facilities to serve all four-year-olds by 2026.

Some school districts intend to offer CSPP (California State Preschool Program) as a Preschool option for families. Nine school districts offer CSPP programs for 3- and 4-year-olds. Two districts will offer a combination of CSPP and TK classes. Six districts plan to expand CSPP programs in the future (see **Table 5-2**).

The expansion of TK will impact the demand for Preschool and after-school in San Mateo County. By 2032, there will be a significant decrease in demand for Preschool (although there is still a small gap or shortfall), and an increase in demand for after-school care. Working families with a child in TK will need options to serve children after-school and during the summer. After-school programs serving 4-year-olds will need to adapt to become safe and developmentally appropriate for the younger age group.

The community-based, private Preschool field has raised a number of concerns about how the expansion of TK could undermine their ability to operate successful businesses. Preschools rely on tuition from 4-year-olds since this is the age group that has the highest child-to-adult ratios. Serving 3-year-olds and infants/toddlers takes more resources, and programs may close without 4-year-old enrollment. Fewer programs, in turn, could limit family choice. There is also a concern that teachers

currently working in Preschool may move to better-paying positions in TK, contributing to labor shortages.

**Table 5-2**  
**CSPP and Transitional Kindergarten Plans by School District**  
**San Mateo County Child Care Needs Assessment - 2022**

District Name	Currently Offers CSPP	Plans to Expand CSPP in Future	Will Offer CSPP/TK Combination Classes
Bayshore Elementary	Yes	No	Yes
Cabrillo Unified	Yes	Yes	Yes
Jefferson Elementary	Yes	Yes	
La Honda – Pescadero Unified	Yes	No	
Menlo Park City	Yes	Yes	
Redwood City	Yes	Yes	
San Carlos	Yes	Yes	
San Mateo-Foster City	Yes	Yes	
South San Francisco Unified	Yes	Yes	

Sources: Sarah Kinahan, Coordinator, Child Care Partnership Council, San Mateo Office of Education; Brion Economics, Inc.

## Potential Impacts of Universal Preschool

In May 2021, EdSurge.com posted an article about the unintended consequences of Universal Preschool (UPK). This article<sup>76</sup> is part of the EdSurge Research Series about early childhood education. Findings include:

- Research has shown that children placed in early childhood education and development programs are more likely to graduate high school, less likely to be placed in special education programs, and less likely to repeat a grade. Cities that have implemented UPK have seen a 13% return on investment year-over-year. However, the way the child care system currently operates in the US creates inequities where some families are able to access high-quality early

<sup>76</sup> Tate, E. (2021, May 10). *The Unintended Consequences of Universal Preschool*. Edsurge.com <https://www.edsurge.com/news/2021-05-10-the-unintended-consequences-of-universal-preschool>

child care and education, and other families are prohibited due to cost and access. This often leaves those children behind for the long term.

- President Joe Biden’s \$1.8 trillion *American Families Plan* proposal calls for a national partnership with states to create UPK for 3- and 4-year-olds, that when fully implemented could put five million children into high-quality programs and save the average American family \$13,000 per year. This proposal does not close the sustainability gap in the child care system but would if the programs were well-resourced. However, UPK would not address the gaps in Infant/Toddler care and in some cases could further reduce those spaces that are already in short supply.
- For instance, when New York City expanded its UPK to include 4-year-olds in 2014, many existing child care programs that previously had Infant/Toddler spaces raced to serve the newly eligible pre-K students. This led to approximately 2,700 fewer spaces for children under 2 which accounted for 15%-20% of the total availability of Infant/Toddler care in the city.
- Child care programs bring in the most revenue from the oldest children due to the higher child-to-teacher ratio, which is much reduced when caring for Infants. Offering subsidies and incentives to providers that could be used to increase wages in order to help preserve the workforce of the private child care providers would help to maintain sufficient Infant/Toddler spaces.
- For instance, Multnomah County, Oregon has implemented a UPK program, which offers incentives to providers to retain spaces, through their Infant and Toddler Slot Preservation Fund. This includes up to \$25 million a year to offer increased wages and preserve their workforce. It also includes the implementation of a wage adjustment for assistant teachers to a minimum of 75% of a lead teachers’ wage and they have doubled their Preschool salaries.
- Rising teacher pay in public programs often draws skilled educators out of the private sector leaving these private programs short-staffed and having no budget to offer incentives to staff to encourage them to stay. A well-designed plan would also include a path to establish salary parity industry-wide and include appropriate staffing, staff professional development, credentialing requirements, and fair teacher compensation. Ideally, the plan would also provide flexibility in scheduling to accommodate parents who need a longer day of care and non-traditional child care hours. Any significant public program should focus on the needs of the underserved so that all families can be included.