



Brion Economics INC.

davisconsultantnetwork

# San Mateo County Early Learning Provider Facilities Survey Findings

*Prepared for:*

San Mateo County Human Services Agency

with

First 5 San Mateo County

and

Child Care Partnership Council of San Mateo County

*Prepared by*

Davis Consultant Network

Brion Economics, Inc.

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# San Mateo County Early Learning Provider Facilities Survey Findings

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## Introduction

The Davis Consultant Network, Brion Economics and the San Mateo County Early Learning Facilities Needs Assessment Committee developed an online survey of licensed or exempt early education and child care centers serving children ages 0-5 years. The focus was to understand the status of their facilities, program demand and supply, and providers' interest in program expansion. There was an initial survey, and a follow-up survey for multi-site administrators.

## Sample

The San Mateo County team provided a list of 330 child care and preschool programs which had a total of 232 unique administrators. Between March 24, 2016 and April 21, 2016, 121 administrators (52% of those contacted) initiated the survey, reporting for a total of 154 unique licensed or license-exempt early learning locations<sup>1</sup> in San Mateo County. Fifteen responses were disqualified for various reasons (exiting the survey early, reporting on one site twice, or reporting on a site outside of the county), leaving the total number of sites analyzed at 139. In total, respondents reported current enrollments of 1,080 children under age two (71% of the total 1,514 licensed and license-exempt infant spaces), and 8,467 children ages 2-5 (52% of the total 16,296 licensed and license-exempt preschool spaces) for a total of 9,547 child care spaces reported (54% of the total licensed and license-exempt spaces in San Mateo County).

	# Sites	# Enrolled
<b>All Sites Reporting</b>	139	9,547
Serving children 0-2 years	39	1,080
Serving children 2-5 years	137	8,467

While the response rates were quite impressive, we do not know if those that did not respond may have considerably different unreported situations. The descriptive statistics below describe the findings from those that responded.

## Site Ownership and Tenure

Together, faith-based organizations and school districts provide 52% of the facilities for these early learning programs. Many programs have been at their current location for decades. On the average, programs that own their facilities have a longer tenure in a current location than those that rent.

*Of those responding...*

- The average number of years of operation in the current site was 25 years, with responses ranging from 4 months to 77 years.
  - Of those that do not own their facility, the average tenure at that location was 19 years, with a range from 1-65 years.
  - Of the 15 sites with 50 or more years at their current location, 80% own their facility and 53% are located on a faith-based campus.
- Half own their own building, with ownership durations from less than a year to 77 years, with an average ownership tenure of 30 years.

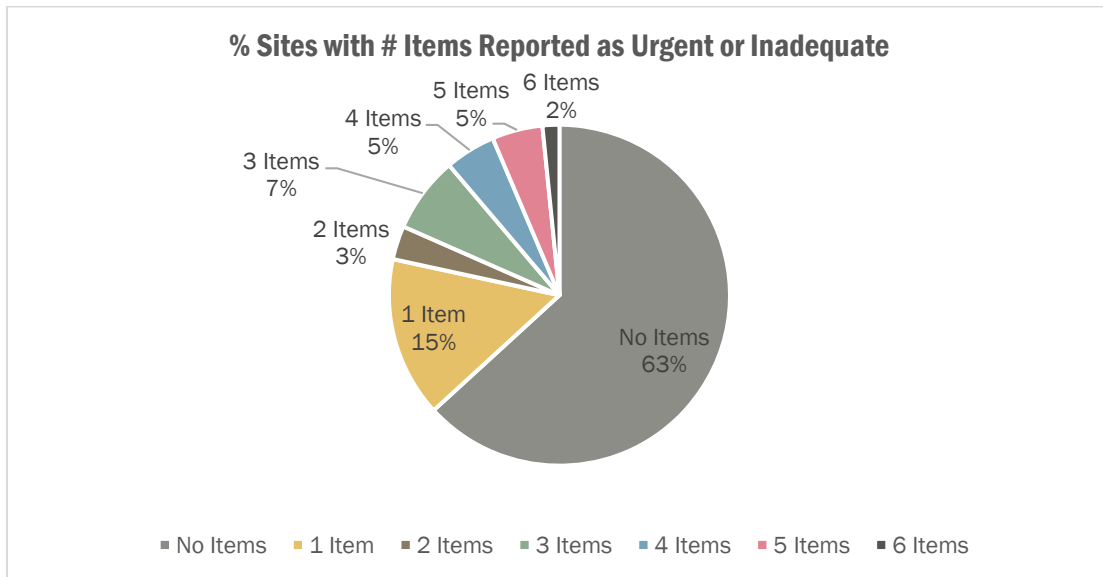
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<sup>1</sup> Some multi-site administrators or those with separate licenses for their infant/toddler and preschool programs aggregated their responses.

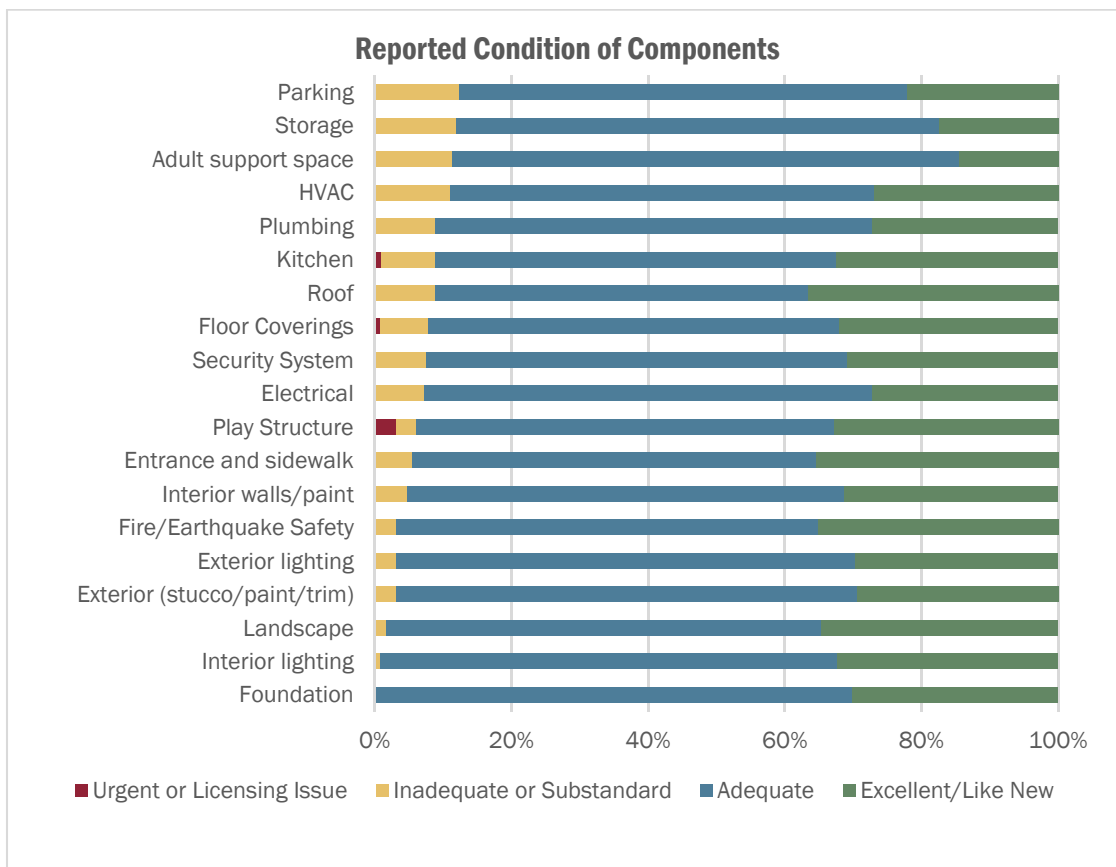
- The most common facilities locations are on faith-based (29%) or school district campuses (23%). Other locations reported were converted commercial building (16%), converted residential building (16%), city owned (11%), built for childcare (4%) and adjunct to apartment buildings (3%).
- Of the 63 reporting sites which rent their facilities, 11 sites anticipate issues renewing their lease or know they will have to relocate. Four reported increased rents were forcing them out of their current location. Two reported decisions by school districts. Other reasons cited were program expansion, landlord reluctance to maintain the property, or imminent sale of the property.

## Site Condition and Maintenance

The survey asked respondents to report their perceptions of the adequacy of various components of their site facility. Most programs reported that they were keeping up with critical facilities and grounds maintenance. One fifth of reporting sites are currently investing in repairs or renovations, ranging from routine maintenance like painting, deck-sanding and carpet replacement to major energy and seismic retrofits. Another fifth are deferring maintenance (e.g. concrete repair, heating and air conditioning repair, roof, sewer line upgrade) and desired upgrades (e.g. expansion, playgrounds, landscape). The reasons most frequently given by the 17 sites reporting deferred maintenance were high cost of repairs (65%), followed by lack of funds (59%), and lack of time or expertise to manage the project (18%). When asked about specific facilities components, ADA accessibility, parking, storage, adult support space, and heating and air conditioning were areas most frequently reported as lacking in adequacy. Thirty-seven percent of sites reported one or more item that was either “urgent or licensing issue” or “inadequate or substandard”.



*Thirty-seven percent of the sites reported one or more items that were urgent or inadequate.*

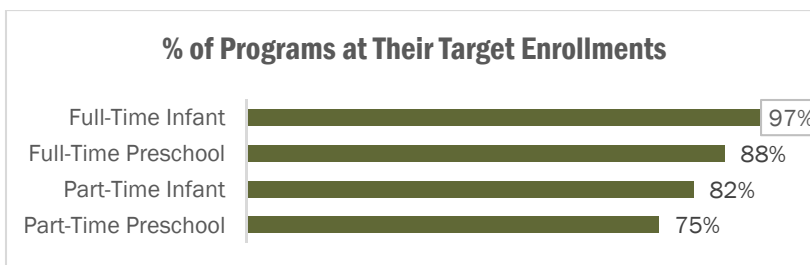


*Facilities Conditions by Component - Respondents were asked for their assessment of the condition of various aspects of their facility. Note that for security systems, 18 sites indicated “not applicable”.*

## Waitlists and Enrollment Targets

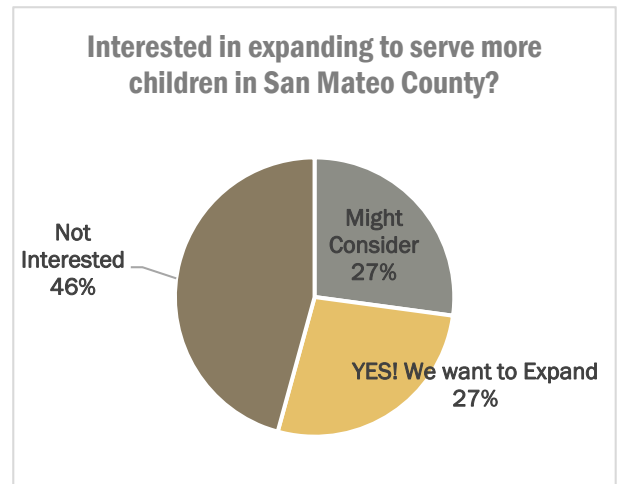
The majority of sites have waitlists and would consider expanding to serve more children in San Mateo County.

- 96 of the reporting sites (69%) have waitlists.
  - 25 sites reported a total of 642 infant/toddlers (ages 0-24 months) on waitlists.
  - 89 sites reported a total of 2814 preschool children (ages 2-5 years) on waitlists.
- When asked if they were meeting their enrollment targets (not more than 3 unfilled spaces) virtually all the full-time infant programs were full, followed by 88% of the full-time preschool programs. (See chart below.)



## Interest in Expansion

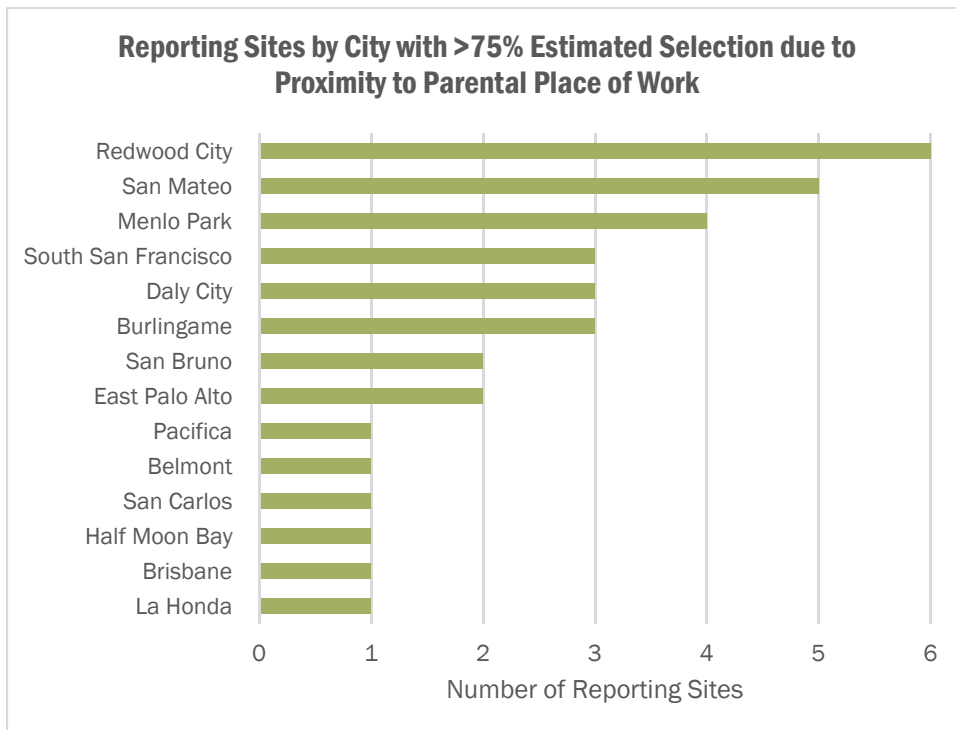
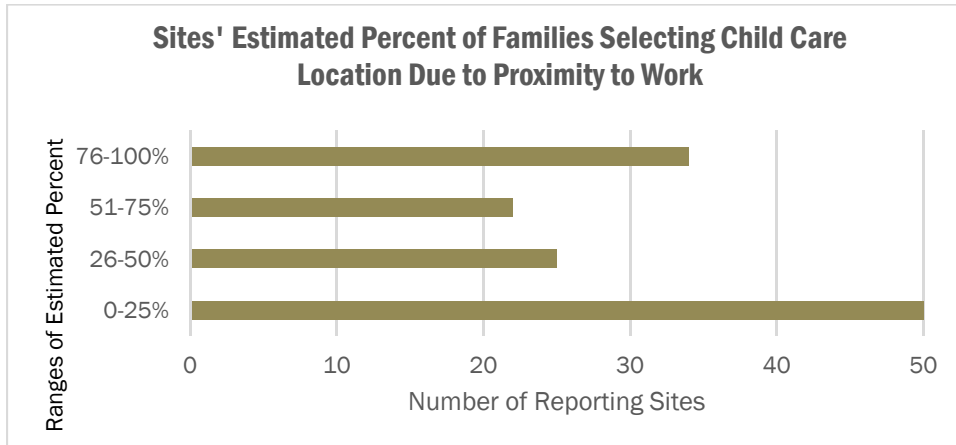
- When asked “Would you or your organization/business consider expanding to serve more children ages 0-5 in San Mateo County at this or another location?” half (69 sites) would consider expanding.
- When asked if they anticipated any barriers to expansion...
  - 55% anticipated the greatest barrier would be difficulty finding an available site,
  - followed by 48% concerned about the lack of funds to expand.
  - Other barriers are displayed in bar chart below.
- Of the 33 sites that know they want to expand...
  - They hope to serve 300 infants/toddlers and over 1000 additional preschool children.
  - 5 sites (15%) don’t anticipate any barriers for program expansion.
- When asked “If there was a county-wide program to assist child care providers with facilities expansion, would you or your organization be interested in finding out more and possibly participating?”, 69% (75 sites) expressed interest.
- All respondents were asked if they knew of potential new sites. Twelve offered ideas.



*This question was addressed to the 69 respondents who indicated desire or willingness to consider expansion. The top nine items were offered as choices. Most of the “other” barriers offered as a write-in option were readably classified by offered choices, with the exception of the bottom three in the chart above.*

## Selection of Site for Proximity to Work

Survey designers were interested to learn what early learning locations were selected by families more for proximity to work than to home. Since no parental survey was planned, the team asked the site administrators “Roughly, what percent of the children you serve have parents that work near your center? In other words, what is your best guess as to the percent of families that have selected {{ site name}}, in part, because it is near to their work?” Responses ranged from 0-100%, with sites located in Redwood City, San Mateo and Menlo Park most frequently estimating greater than 75% of families selecting the early learning location for convenience to work of a parent.



*This chart includes only cities in which any reporting administrators estimated that 76% or more of their families selected that early learning program due to its proximity to a parent's place of work.*

## Other Considerations

The survey ended with an open-ended question: “Do you have anything else you would like to tell us as we consider ways to ensure adequate supply of child care facilities in San Mateo County for the years to come?” All responses except “no”, “none” or “not at this time” are included in table below.

Responding Providers' Comments	
<b>Land Use Planning and Permitting Issues</b>	
1.	Look for child care spaces that are accessible by public transportation.
2.	We previously looked at potential on-site expansion. The City of Redwood City made it very clear to us that they were very likely to deny any expansion efforts. They have also made it clear that new facilities require substantial efforts including traffic studies, noise studies and environmental impact studies. That can cost thousands of dollars that is not construction costs. An updated traffic study actually cost close to \$7000 alone.
3.	We have been looking for a location for years and it is very very challenging- parking regulations are difficult and we are being priced out by startups... we finally purchased a piece of land but we are now waiting for rezoning...
4.	The location we have is ideal for young children since it is a residence that has a special use permit granted 40 years ago to operate as a child care facility. My understanding is that it is almost impossible to apply for and receive a special use permit like this on a home now. It is a shame because it really is a great location for children and would solve a lot of the issues with finding facilities.
5.	We have been looking for a space to rent near our Pacifica location for over a year. We want to expand ASAP.
6.	There is a tremendous need for high quality childcare facilities in San Mateo County! There are many restrictions and little government assistance in finding a site and getting approval! Childcare facilities provide an invaluable service to all who live and work in the county and they should be better supported.
7.	Require new construction to address Childcare facilities
<b>Streamline Permitting and Licensing</b>	
8.	County needs to improve on the amount of time it takes to process the application to open a school, provide space and financial assistance.
9.	In preparation for constructing and opening our center 4 years ago, we worked diligently with State Licensing to ensure our program met all requirements (which it does). The licensing process is quite a challenge - inconsistent information (training classes and manual contradict each other, different training instructors contradict each other, lack of timely response to inquiries, documentation not updated promptly. This makes the process very cumbersome! Licensing would not advise on design questions - we had to make design decisions and then present them to Licensing for review/ approval. Given inconsistency in interpretation of regulations, resulted in additional time and cost.
10.	Easier city ordinances. It takes too long and too complicated a process to get approvals/permits.
11.	Government agencies offering funding to help centers and potential sites meet licensing requirements.
<b>Address Disparate Shortages for Infants, Toddlers, and Special Needs</b>	
12.	More infant/toddler facilities are needed in this area.



13. I would like to clarify that my personal disinterest in expanding is only a personal decision. I would have been very interested ten/fifteen years ago, but not at this stage in my life. The community certainly needs it, especially for infants and toddlers.

14. The other issue is accessibility. We just renovated a second location for our elementary and it was incredibly expensive due to accessibility concerns. While we absolutely want it to be accessible, it is also important to have regulations regarding changes so that some can be phased in and more flexible for small businesses needing to change the use designation of a location. Having most of the public space accessible and then a plan in place to move towards the rest would really help make change of use applications possible.

15. We have been working towards inclusion and would greatly appreciate any financial support towards this goal.

#### **Balance Public and Private Options and Affordability**

16. While serving at-risk children is important the county should consider all children in the county. 'Middle of the road' families suffer in that they make too much for state preschool and head start and aren't always happy with the quality of those programs and they don't make enough to send their child to a program without sliding scale tuition.

17. When the public and private elementary schools open nursery schools on site they are hurting the private small nursery schools that are trying to continue to thrive. I would rather see a relationship/partnership between current nursery schools and the elementary schools joining together rather than putting the smaller businesses out of business.

18. Provide more subsidy options and that pay higher. The middle income families can't afford childcare centers and make too much to receive help. This is a huge issue in San Mateo County.

19. It would be great for the County to develop and direct several private-pay centers for middle- to high-income families.

#### **Recognize Stability of Site Ownership**

20. We are committed to provide the highest level of early childhood education. We do need access to funds in order to own the site. Please help us, we were basically evicted because in Menlo Park the rent rate is outrageous due in great part for the massive amount of land that was bought by Facebook. Making it impossible for small centers to compete. Centers need to own their facilities. Rents/leases put the centers in very precarious situations. Centers can be out on the street and families without services very quickly if the owner wants to make money.

#### **Build Multi-Sector Partnerships**

21. I wish I had the answer, we do need to explore options with our public agency partners to see if they have unused space in libraries, government buildings, community centers etc.

22. The ability for faith-based programs to participate in this and receive state funding for spaces.

#### **Teacher Qualifications and Wages Also an Issue**

23. I feel one of the largest problems for child care facilities is having enough funds to pay quality teachers with. The overhead cost are so high and State licensing regulations so choking along with the cost of benefits cripple the programs, causing a lack of teachers and an inability to run childcare facilities.

24. Facilities need to have a great salary base for their employees as this area of work is greatly low in that area and education is highly required.

25. The only way for <public> programs to stabilize and serve more children is to radically increase the reimbursement rate from the state of California. Programs need the funds to hire caring, compassionate, educated, intelligent staff to work with the myriad of social dynamics our families' experience.

26. It would also be great to legislate the BA degree and p-3 credential completion of ECE lead teachers.

#### **Other Provider Support Ideas**

27. Support independent preschools - being able to pool together for lower insurance costs and benefits for employees.

28. Our school is experiencing low enrollment. Word of mouth used to be enough to ensure our enrollment, but now we need to build a marketing plan. Training in advertising, marketing and using social media to present our school to the public would be helpful. <This comment was from a part-time preschool program.>

29. There needs to be more sites that can support and integrate children with a disability with their "typically" developing peers

30. As buildings are acquired or built, it is essential to have ECE educators and leaders there to support the planning. They know what is best for a classroom learning environment and should have a say in the structural and planning decisions.

#### **Appreciation**

31. Thank you for taking time and effort to reach out to our community of early childhood educators to address this important issue.

32. Thank you for supporting this local community need

## Summary Table of Survey Responses by City

City→	Atherton	Belmont	Brisbane	Burlingame	Colma	Daly City	East Palo Alto	El Granada	Foster City	Half Moon Bay	Hillsborough	La Honda	Menlo Park	Millbrae	Montara	Pacifica	Pescadero	Portola Valley	Redwood City	San Bruno	San Carlos	San Mateo	South S.F.	Woodside	TOTAL/Average
Invited	4	7	2	14	1	16	4	1	10	4	2	1	24	8	1	11	1	4	28	14	13	42	18	2	232
Surveys Completed	2	7	2	7	0	7	4	1	5	4	2	1	15	1	1	7	1	3	20	6	4	28	11	1	140
% Completed	50	100	100	50	0	44	100	100	50	100	100	100	63	13	100	64	100	75	71	43	31	67	61	50	60
Average years in operation	29	31	16	27	na	26	23	22	22	27	38	25	15	77	30	34	11	33	25	34	29	47	16	25	23
Range of years in operation	18-40	4-67	13-20	2-65	na	3-64	10-49	22	10-43	20-41	35-41	25	1-42	77	30	2.5-55	11	12-50	3-64	16-51	3-46	1-70	.5-30	25	.5-77
Infant/Toddler Enrolled	10	117	0	12	na	0	17	0	92	25	0	0	131	0	0	40	0	28	2190	130	0	244	44	0	1080
Preschool Enrolled	100	447	66	551	na	522	448	250	313	143	55	26	681	53	20	259	11	92	1532	561	221	1521	542	53	8467
Infants on waitlists	na	24	na	0	na	na	24	na	6	10	na	na	45	na	na	22	na	0	207	50	na	189	65	0	642
Preschoolers on waitlist	126	44	10	44	na	54	134	15	44	16	0	2	215	0	2	64	0	0	667	65	10	564	634	10	2814
# Owned	1	4	1	3	na	4	3	1	1	2	1	1	9	1	1	2	1	2	6	4	1	14	2	1	66
% Owned	50	57	50	43	na	57	75	100	20	50	50	100	60	100	100	29	100	67	30	67	25	50	18	100	47
# Want to expand	0	1	1	2	na	1	1	1	3	1	0	0	5	0	0	4	0	0	3	2	2	4	3	0	34
# Might expand	1	4	0	3	na	3	1	0	1	0	0	1	3	0	1	1	0	0	9	1	0	6	1	0	35
# Total open to expansion	1	3	1	5	na	4	2	1	4	1	0	1	8	0	1	5	0	0	11	4	2	10	4	0	69
% Open to expansion	50	57	50	71	na	57	50	100	80	25	0	100	53	0	100	71	0	0	55	67	50	36	36	0	49

**Table of Number of Responses by Question**

	<b>Question</b>	<b># Validated Responses</b>
1	Do you or your business/organization manage only one or multiple child care center locations at this time? <i>(This question was asked only in initial survey and was used to identify administrators to invite to participate in follow-up survey for multi-site administrators.)</i>	134
2	Please confirm the center name for which you are currently responding.	148
3	Approximately, for how many years has this program been operating at this location?	136
4	Please check the building types which apply to {{ Q2 }}.	137
5	What are your current enrollment numbers at {{ Q2 }}	136
6	How well are you meeting your target enrollment at {{ Q2 }} for each of the following?	137
7	Does {{ Q2 }} have a wait list?	140
8	Approximately, how many children are on your wait list?	93
9	Roughly, what percent of the children you serve have parents that work near your center? In other words, what is your best guess as to the percent of families that have selected {{ Q2 }}, in part, because it is near to their work? (Please enter numbers.)	121
10	Do you or your organization own the {{ Q2 }} building?	136
11	Do you or your organization currently rent or lease the facility? <i>(Asked only for the 67 sites reporting that they did not own their building)</i>	67
12	Does {{ Q2 }} have donated use of facilities? <i>(Asked only for the 6 sites reporting that the program neither owned nor rented their facility.)</i>	6
13	Do you anticipate any problems renewing your lease or continuing to rent this space?	64
14	Do you currently have any significant repairs or renovations underway at this location?	134
15	Have you received bids or estimates for repairs or renovations that have not yet been pursued?	129
16	What stopped you from making the repairs or renovations you have considered? (Please check all that apply.)	7
17	Please rate the current condition of these significant components of the {{ Q2 }} facility.	124
18	Would you or your organization/business consider expanding to serve more children ages 0-5 in San Mateo County at this or another location? (Note: this question is not limited to the site you have been describing in previous responses.)	127

<b>Question</b>		<b># Validated Responses</b>
<b>19</b>	What is your timeline for expansion? <i>(Only asked of the 34 respondents indicated that they want to expand.)</i>	34
<b>20</b>	Please check all the types of spaces you are considering. <i>(Only asked of the 69 respondents indicating either that they want to or would consider expanding.)</i>	66
<b>21</b>	Do you face or anticipate barriers for program expansion or opening a new site? (Please check all that apply.) <i>(Only asked of the 69 respondents indicating either that they want to or would consider expanding.)</i>	64
<b>22</b>	Do you know of any potential buildings or sites (vacant lots, buildings, shared facilities, etc.) which might be developed for child care/early learning facilities? <i>(Only asked in initial survey.)</i>	110
<b>23</b>	If there was a county-wide program to assist child care providers with facilities expansion, would you or your organization be interested in finding out more and possibly participating? <i>(Only asked in initial survey.)</i>	110
<b>24</b>	May we include the name of your organization or center site in a public list as one that is interested in expansion? <i>(Only asked in initial survey.)</i>	73
<b>25</b>	If you are the facility administrator for multiple sites, how would you like us to follow-up	73
<b>26</b>	If you would like your name entered in the raffle to win a gift certificate for educational supplies, please provide your name and email below.	77
<b>27</b>	Do you have anything else you would like to tell us as we consider ways to ensure adequate supply of child care facilities in San Mateo County for the years to come?	42

## Special Thanks!

The San Mateo County Early Learning Facilities Needs Assessment Committee, Brion Associates, and Davis Consultant Network sincerely thank all those administrators who took the time to respond to our survey. The following providers agreed to be publically acknowledged for their contribution to this report.

All Five  
Bright Beginnings Montessori Preschool  
Casa dei Bambini Inc.  
Centennial Montessori School  
Chai Preschool  
Champions (KinderCare Education)  
Creative Montessori Learning Center, Inc.  
Footsteps Child Care, Inc.  
Holy Cross Preschool  
Hugs Hangout  
Institute for Human and Social Development, Inc.  
Jefferson Elementary School District  
Kids Konnect Child Development Center  
Lakeview Montessori  
Life Steps Foundation Children & Family Services  
Little Wonders  
Odyssey Preschool  
Ravenswood Child Development Center  
Redwood City School District Child Development Centers  
Roots N Wings Montessori School  
Skyline College Child Development Laboratory Center  
SSFUSD-Child Development Program  
Tapestry Church/Kiddie Garden Preschool  
The Latchkey Alternative Center  
Toddle Flexible Preschool  
University Heights Montessori Children's Center