



Final Report:

CITY OF SAN BRUNO PROFILE

San Mateo County

Child Care Needs Assessment 2022 and 2032:

Supply and Demand Summary

Prepared for

San Mateo County Child Care Partnership Council,

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



Prepared by

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CITY OF SAN BRUNO CHILD CARE SUMMARY

Brion Economics, Inc. prepared this summary report for the San Mateo County Office of Education (SMCOE), in partnership with the San Mateo County Child Care Partnership Council, First 5 San Mateo County, and the Silicon Valley Community Foundation. This summary report is based on a countywide study of child care needs for children 0 to 12 years old and is one part of a larger, countywide study that identifies current and future child care needs by city, also known as supply and demand analysis.

DEMOGRAPHICS¹

San Bruno	2022	2032	Net Change	% Change
Total Population	42,377	45,430	3,053	7.2%
Total Employees	14,661	14,757	96	0.7%
Children Under 2 Years Old	685	676	(9)	-1.3%
Children 2 to 4 Years Old	1,552	1,533	(19)	-1.3%
Children 5 to 12 Years Old	3,175	3,178	4	0.1%
Total Children 0 to 12 Years Old	5,412	5,387	(24)	-0.5%
Children 0 to 12 as % of Total Population	12.8%	11.9%		-0.9%

Note: 40% of 4-year-olds are shifted to School Age, or 5- to 12-year-olds at 2032 for Transitional Kindergarten.

CHILD CARE SUPPLY AND DEMAND AS OF 2022

- **Child Care Providers:** 61 total providers: 31 Family Child Care Homes (FCCH Spaces) and 30 Child Care Centers (Center Spaces) with a total of 2,754 spaces.
- **2022 and 2032 Estimated Supply of Child Care Spaces²**

2022 Supply in San Bruno				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	75	20	95	3%
Preschool	150	985	1,135	41%
School Age	101	1,423	1,524	55%
Total Supply	326	2,428	2,754	100%
% of Supply	12%	88%	100%	

2032 Supply in San Bruno					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change in Supply
Infants	78	20	98	4%	3	3%
Preschool	153	985	1,138	41%	3	0%
School Age	101	1,423	1,524	55%	-	0%
Total Supply	332	2,428	2,760	100%	6	0%
% of Supply	12%	88%	100%			

¹ Population and employment data is from ABAG's *Projections 2040*, ELNAT, and ABAG's *Projections 2013*. Please note that totals in charts may be slightly off due to rounding.

² Infants include birth up to 2 years, Preschool includes 2 to 4-year-olds, and School Age includes 5 to 12-year-olds.

- **Planned Spaces:** In San Bruno, there is one new planned child care project, with three Infant and three Preschool spaces.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 2,871 spaces, including 2,694 spaces for residents and 177 spaces for non-resident employees working in San Bruno and commuting in from outside the County.

2022 Demand in San Bruno				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	255	71	326	11%
Preschool	950	106	1,057	37%
School Age	1,489	-	1,489	52%
Total Demand	2,694	177	2,871	100%
% of Demand	94%	6%	100%	

- **2032 Estimated Demand for Licensed Spaces and Net Change**

2032 Demand in San Bruno					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	237	71	308	10%	(18)	-5%
Preschool	985	107	1,092	34%	35	3%
School Age	1,771	-	1,771	56%	282	19%
Total Demand	2,992	179	3,171	100%	300	10%
% of Demand	94%	6%	100%			

- **Estimated Shortage or Surplus of Child Care Spaces in 2022 and 2032**

Estimated Surplus or Shortage of Spaces by Year - San Bruno				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(231)	29%	(210)	32%
Preschool	78	107%	46	104%
School Age	35	102%	(247)	86%
Total Surplus/(Shortage)	(117)	96%	(411)	87%

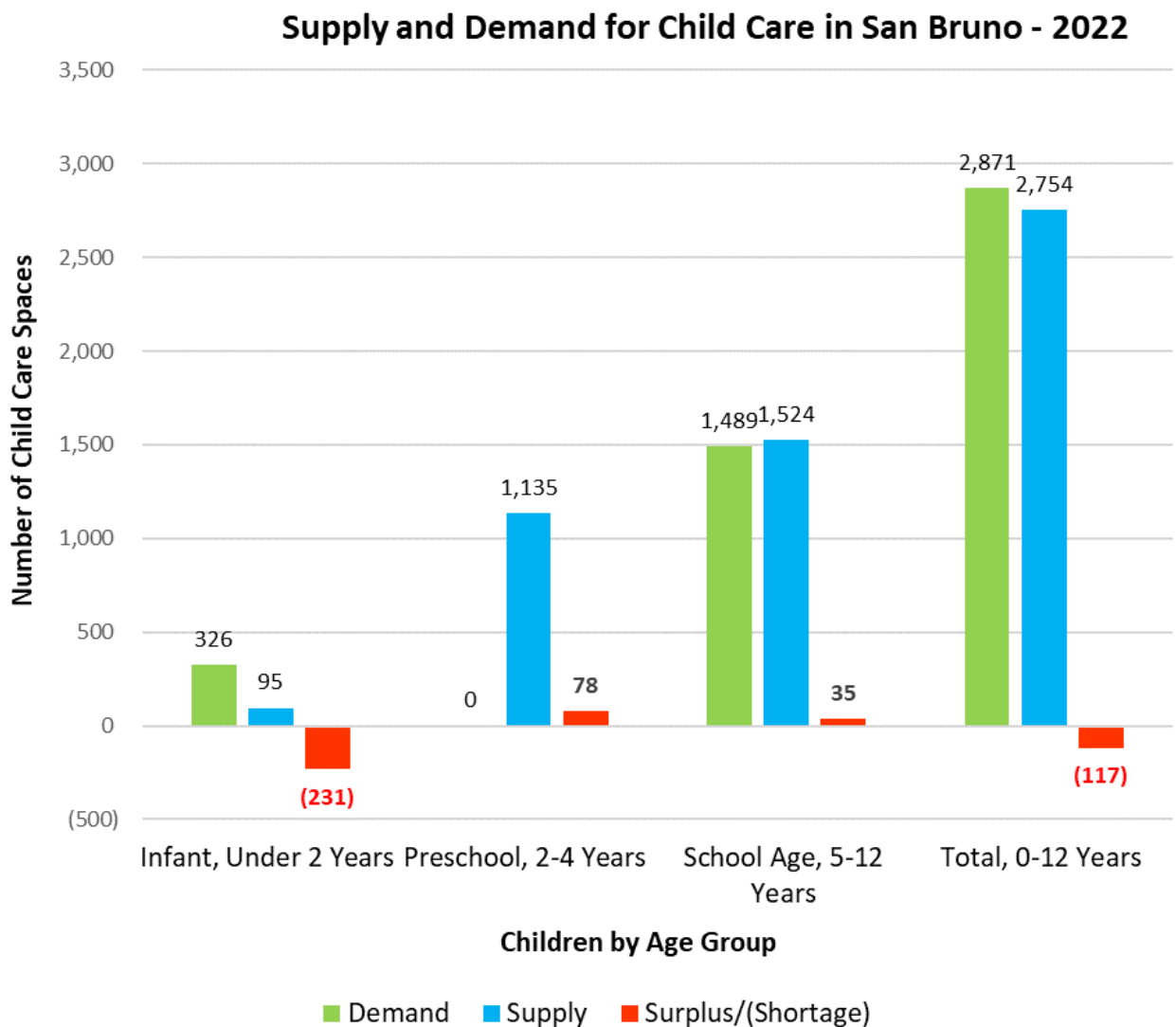
- **Subsidized Need and Spaces:**³ According to data from SMCOE and the California Department of Education, San Bruno has 30 Infant and 203 Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,⁴ San Bruno has 613 children ages 0 to 4 that qualify for subsidized care. This translates into 38% of the current need being met. There is an unmet need for 380 subsidized spaces for children 0 to 4 years old. The City has an additional 166 School Age center-based subsidized spaces (not shown below).

³ Includes State Preschool, General Child Care, ASES, Early Head Start, and Head Start, CalWORKs – Stage 2 and 3, and Alternative Payment programs. Age groups for subsidized care are Infants, birth to 2 years old, and Preschool, 3 and 4 years old.

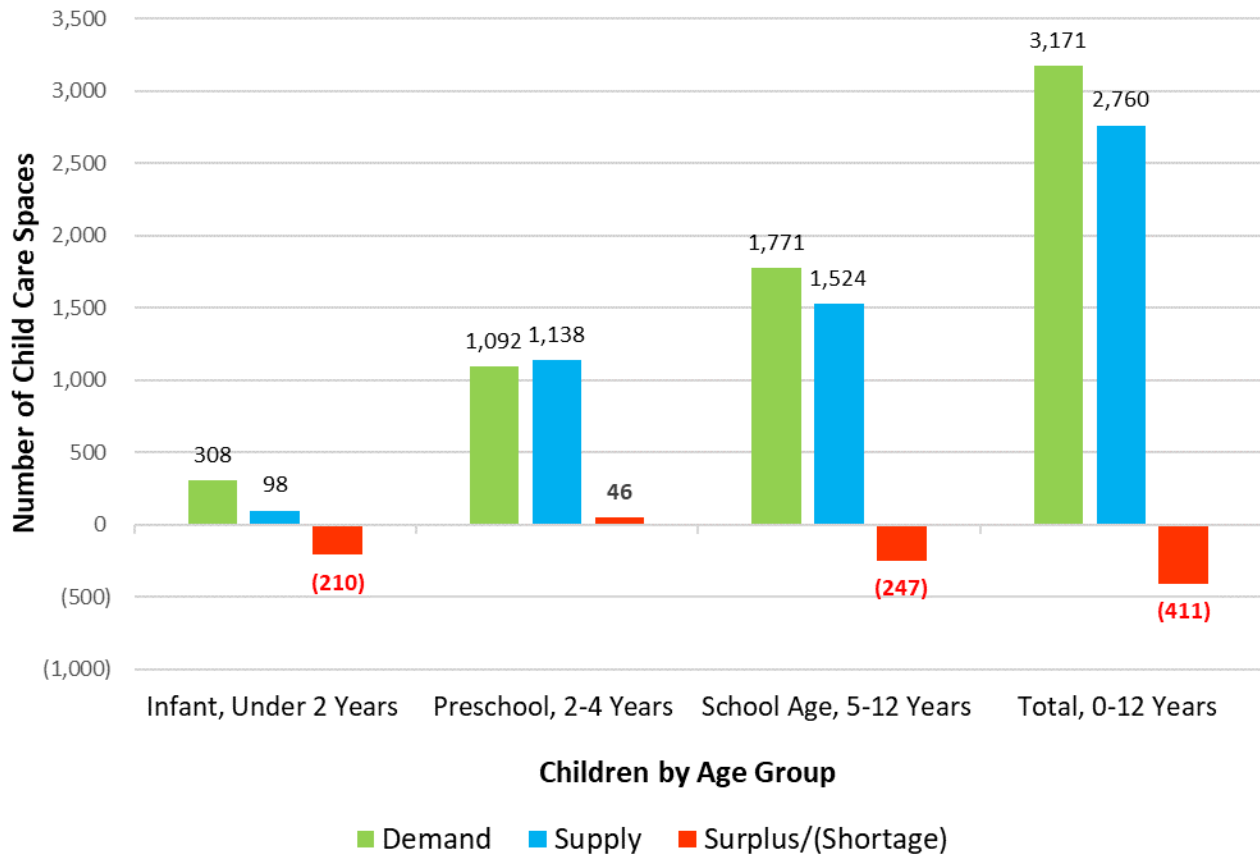
⁴ Early Learning Needs Assessment Tool created by American Institutes for Research (AIR).

San Bruno - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	1,126	949	2,075
Eligible (Need) for Subsidized Spaces	247	366	613
Percent of Total Children	22%	39%	30%
No. of Subsidized Spaces	30	203	233
Unmet Need	(217)	(163)	(380)
Percent of Need Met	12%	55%	38%

Supply and Demand Summary by Year



Supply and Demand for Child Care in San Bruno - 2032



METHODOLOGY OVERVIEW

- **Resident Population:** Total population and children estimates are based on ABAG’s *Projections 2040* for 2022 and 2032. Population data from the Early Learning Needs Assessment Tool (ELNAT) is incorporated to estimate children by age for each City/Area and countywide.
- **Child Care Demand by Age Group:** The following factors are applied to estimates of total children by age group and year. These data are from the *2022 Parent Survey* (see Chapter 3 of the full Needs Assessment) prepared for this study.

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%

- **Transitional Kindergarten (TK):** For 2032 estimates, 40% of 4-year-olds are assumed to utilize TK, increasing the need for School Age child care spaces, and decreasing the need for Preschool spaces. These 4-year-olds are included in the School Age category of children 5 to 12 years old for 2032.
- **Employee Demand:** Using the 2019 5-Year American Community Survey Journey-to-Work data, the number of employees that work in each City/Area and reside outside of San Mateo County is calculated. It is assumed that 3.0% of these non-resident employees commuting from outside the County require child care in the City/Area where they work. This total demand is split 40% for Infant spaces and 60% for Preschool spaces.⁵
- **Subsidies:** Subsidized space data and analysis is from a combination of sources including SMCOE 2022 survey results of direct state contracts, CalWORKs Stage 2 and 3, and Alternative Payment (AP) data from the California Department of Education, and CD-801A Monthly Report for October 2020,⁶ by family residence location. Note that the Early Learning Needs Assessment Tool (ELNAT) does not provide 2020 subsidized data for School age children. ELNAT data is by zip code and has to be combined and/or divided into the study's defined Cities/Areas.

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- Child Care Coordinating Council of San Mateo County (also known as 4Cs);
- San Mateo County Office of Education; and,
- Child Care Needs Assessment Ad Hoc Committee Members

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⁵ It is assumed that School Age children of non-resident employees require child care near their school.

⁶ This is the most current data available.