



*Final Report:*

# CITY OF SAN CARLOS 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*

Brion Economics, Inc.

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## CITY OF SAN CARLOS 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.

### DEMOGRAPHICS<sup>1</sup>

San Carlos	2022	2032	Net Change	% Change
<b>Total Population</b>	<b>35,128</b>	<b>36,036</b>	<b>908</b>	<b>2.6%</b>
Total Employees	17,878	18,392	514	2.9%
Children Under 2 Years Old	746	708	(39)	-5.2%
Children 2 to 4 Years Old	1,189	1,127	(61)	-5.2%
Children 5 to 12 Years Old	3,009	2,887	(122)	-4.0%
<b>Total Children 0 to 12 Years Old</b>	<b>4,944</b>	<b>4,722</b>	<b>(222)</b>	<b>-4.5%</b>
Children 0 to 12 as % of Total Population	14.1%	13.1%		-1.0%

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:** 36 total providers: 12 Family Child Care Homes (FCCH Spaces) and 24 Child Care Centers (Center Spaces) with a total of 1,648 spaces.
- **2022 and 2032 Estimated Supply of Child Care Spaces<sup>2</sup>**

2022 Supply in San Carlos				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	34	68	102	6%
Preschool	68	667	735	45%
School Age	46	765	811	49%
<b>Total Supply</b>	<b>148</b>	<b>1,500</b>	<b>1,648</b>	<b>100%</b>
% of Supply	9%	91%	100%	

2032 Supply in San Carlos					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change
Infants	34	68	102	6%	-	0%
Preschool	68	667	735	45%	-	0%
School Age	46	765	811	49%	-	0%
<b>Total Supply</b>	<b>148</b>	<b>1,500</b>	<b>1,648</b>	<b>100%</b>	-	<b>0%</b>
% of Supply	9%	91%	100%			

<sup>1</sup> 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.

<sup>2</sup> 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 Carlos, there are no known new planned child care projects.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 2,619 spaces, including 2,416 spaces for residents and 203 spaces for non-resident employees working in San Carlos and commuting in from outside the County.

2022 Demand in San Carlos				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	278	81	359	14%
Preschool	728	122	849	32%
School Age	1,411	-	1,411	54%
<b>Total Demand</b>	<b>2,416</b>	<b>203</b>	<b>2,619</b>	<b>100%</b>
% of Demand	92%	8%	100%	

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

2032 Demand in San Carlos					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	248	84	331	12%	(28)	-8%
Preschool	683	125	808	29%	(41)	-5%
School Age	1,632	-	1,632	59%	221	16%
<b>Total Demand</b>	<b>2,562</b>	<b>209</b>	<b>2,771</b>	<b>100%</b>	<b>152</b>	<b>6%</b>
% of Demand	92%	8%	100%			

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

Estimated Surplus or Shortage of Spaces by Year - San Carlos				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(257)	28%	(229)	31%
Preschool	(114)	87%	(73)	91%
School Age	(600)	57%	(821)	50%
<b>Total Surplus/(Shortage)</b>	<b>(971)</b>	<b>63%</b>	<b>(1,123)</b>	<b>59%</b>

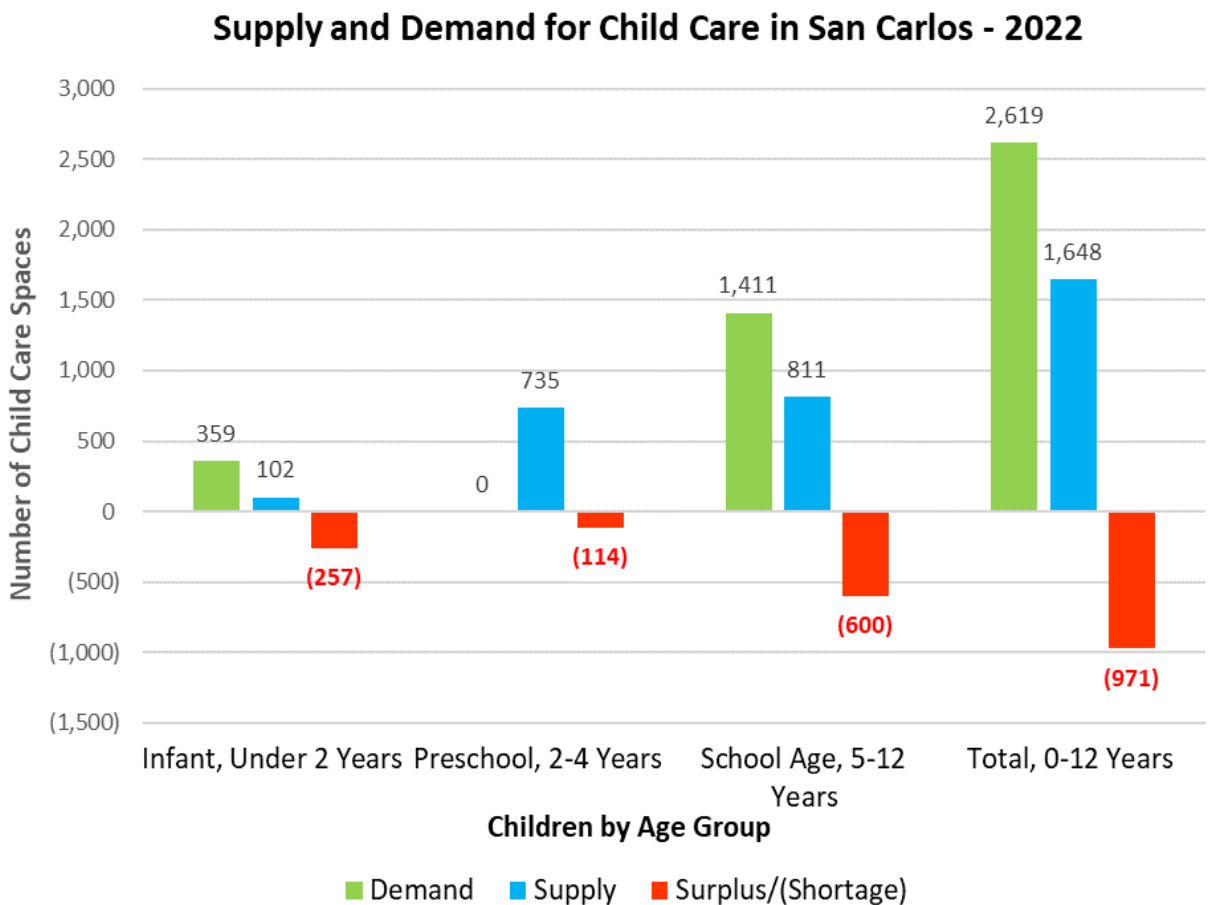
- **Subsidized Need and Spaces:**<sup>3</sup> According to data from SMCOE and the California Department of Education, San Carlos has one Infant and two Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,<sup>4</sup> San Carlos has 361 children ages 0 to 4 that qualify for subsidized care. This translates into 1% of the current need being met. There is an unmet need for 358 subsidized spaces for children 0 to 4 years old.

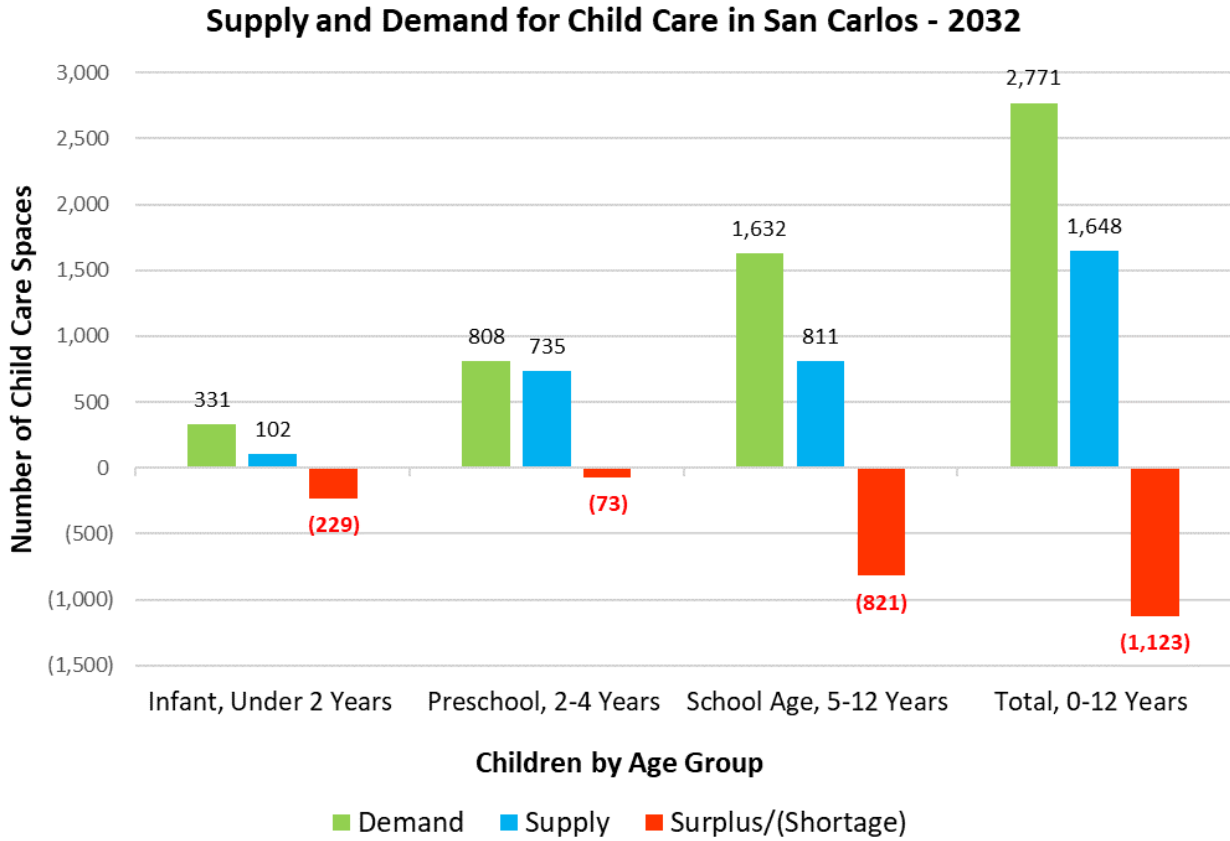
<sup>3</sup> Includes State Preschool, General Child Care, ASES, Early Head Start, and Head Start, CalWORKs – Stage 2 and 3, and Alternative Payment programs. Age groups for subsidized care are Infants, birth to 2 years old, and Preschool, 3 and 4 years old.

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

San Carlos - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	1,106	786	1,892
Eligible (Need) for Subsidized Spaces	179	182	361
Percent of Total Children	16%	23%	19%
No. of Subsidized Spaces	1	2	3
<b>Unmet Need</b>	<b>(178)</b>	<b>(180)</b>	<b>(358)</b>
Percent of Need Met	1%	1%	1%

▪ **Supply and Demand Summary by Year**





## 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.<sup>5</sup>
- **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,<sup>6</sup> 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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<sup>5</sup> It is assumed that School Age children of non-resident employees require child care near their school.

<sup>6</sup> This is the most current data available.