



Final Report:

CITY OF SOUTH SAN FRANCISCO 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 SOUTH SAN FRANCISCO 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

South San Francisco	2022	2032	Net Change	% Change
Total Population	76,933	81,549	4,616	6.0%
Total Employees	63,377	67,108	3,730	5.9%
Children Under 2 Years Old	1,147	1,179	32	2.8%
Children 2 to 4 Years Old	2,594	2,668	74	2.8%
Children 5 to 12 Years Old	5,251	5,458	207	3.9%
Total Children 0 to 12 Years Old	8,992	9,305	313	3.5%
Children 0 to 12 as % of Total Population	11.7%	11.4%		-0.3%

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:** 88 providers: 53 Family Child Care Homes (FCCH Spaces) and 35 Child Care Centers (Center Spaces) with a total of 3,785 spaces.
- **2022 and 2032 Estimated Supply of Child Care Spaces²**

2022 Supply in South San Francisco				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	136	445	581	15%
Preschool	272	2,034	2,306	61%
School Age	188	710	898	24%
Total Supply	596	3,189	3,785	100%
% of Supply	16%	84%	100%	

2032 Supply in South San Francisco					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change in Supply
Infants	136	493	629	16%	48	8%
Preschool	272	2,174	2,446	62%	140	6%
School Age	188	710	898	23%	-	0%
Total Supply	596	3,377	3,973	100%	188	5%
% of Supply	15%	85%	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 South San Francisco, there are three new planned child care projects, with a total of 48 Infant and 140 Preschool spaces.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 5,292 spaces, including 4,477 spaces for residents and 815 spaces for non-resident employees working in South San Francisco and commuting in from outside the County.

2022 Demand in South San Francisco				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	427	326	752	14%
Preschool	1,588	489	2,076	39%
School Age	2,463	-	2,463	47%
Total Demand	4,477	815	5,292	100%
% of Demand	85%	15%	100%	

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

2032 Demand in South San Francisco					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	413	345	758	13%	5	1%
Preschool	1,714	518	2,231	37%	155	7%
School Age	3,043	-	3,043	50%	580	24%
Total Demand	5,169	863	6,032	100%	740	14%
% of Demand	86%	14%	100%			

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

Estimated Surplus or Shortage of Spaces by Year - South San Francisco				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(171)	77%	(129)	83%
Preschool	230	111%	215	110%
School Age	(1,565)	36%	(2,145)	30%
Total Surplus/(Shortage)	(1,507)	72%	(2,059)	66%

- **Subsidized Need and Spaces:**³ According to data from SMCOE and the California Department of Education, South San Francisco has 45 Infant and 364 Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,⁴ South San Francisco has 956 children ages 0 to 4 that qualify for subsidized care. This translates into 43% of the current need being met. There is an unmet need for 547 subsidized spaces for children 0 to 4 years old. The City has an additional 225 School Age center-based subsidized spaces (not shown below).

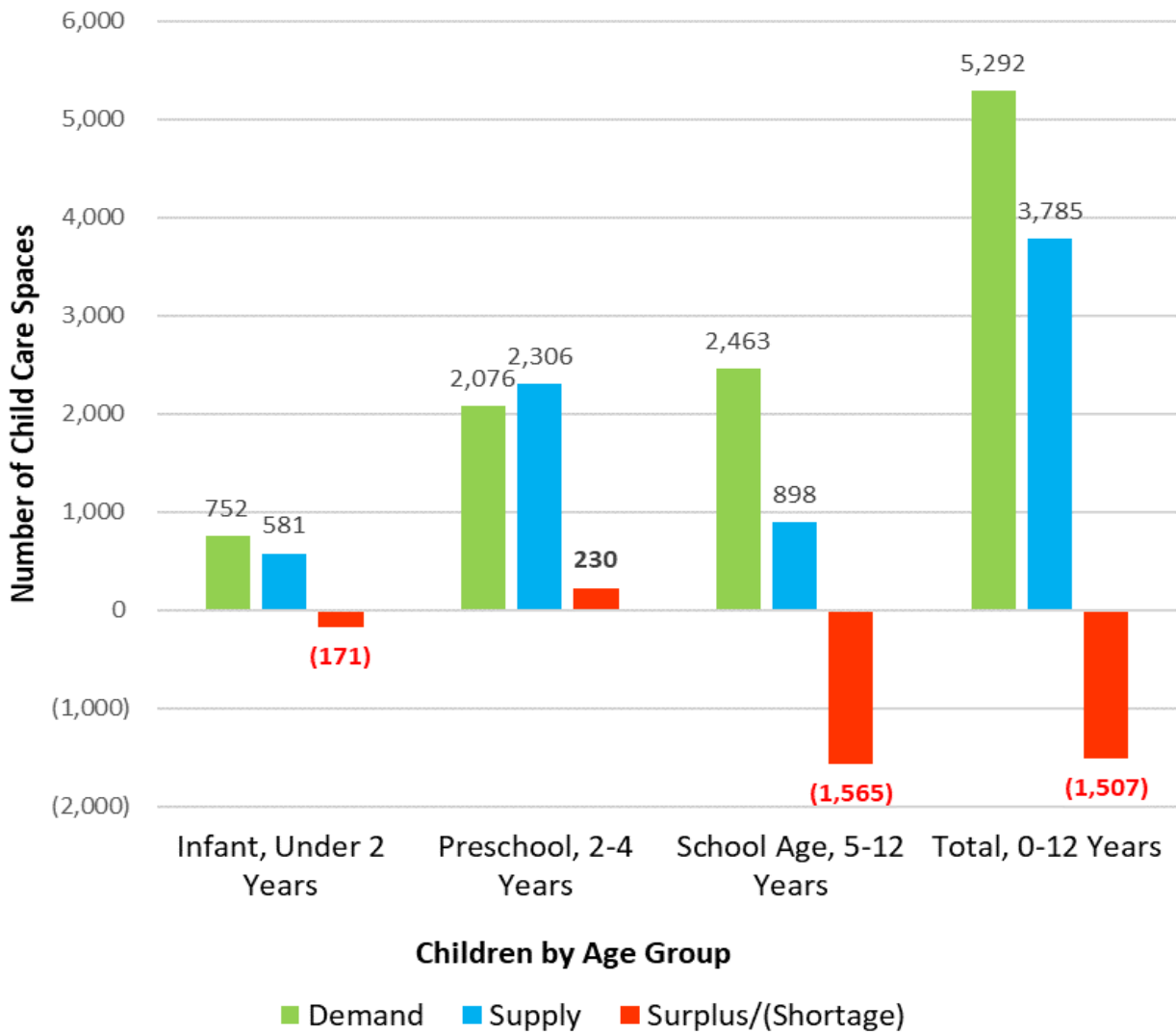
³ Includes State Preschool, General Child Care, ASES, Early Head Start, and Head Start, CalWORKs – Stage 2 and 3, and Alternative Payment programs. Age groups for subsidized care are Infants, birth to 2 years old, and Preschool, 3 and 4 years old.

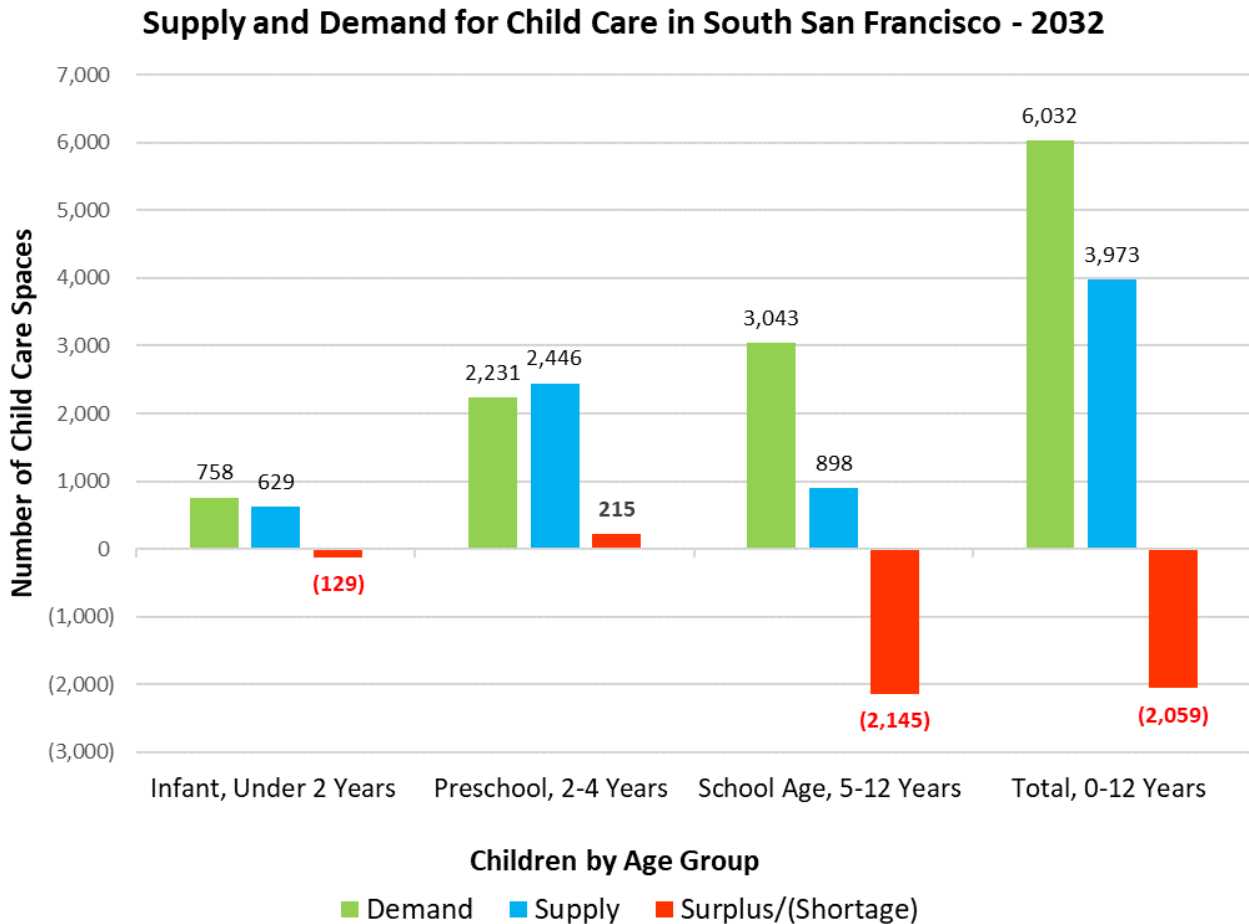
⁴ Early Learning Needs Assessment Tool created by American Institutes for Research (AIR).

South San Francisco - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	1,755	1,479	3,234
Eligible (Need) for Subsidized Spaces	385	571	956
Percent of Total Children	22%	39%	30%
No. of Subsidized Spaces	45	364	409
Unmet Need	(340)	(207)	(547)
Percent of Need Met	12%	64%	43%

Supply and Demand Summary by Year

Supply and Demand for Child Care in South San Francisco - 2022





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

Funding for this study was provided by:



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.