



Brion Economics INC.

Final Report

Contra Costa County Comprehensive Countywide Child Care Needs Assessment – 2017 to 2027

Prepared for

Contra Costa County Local Planning and Advisory Council for Early Care and Education (LPC),
First 5 Contra Costa,
Contra Costa County Office of Education and Contra Costa County Conservation and
Development Department

Prepared by

Brion Economics, Inc., with Davis Consultant Network and Nilsson Consulting

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CONTRA COSTA COUNTY
Office of Education
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1. Introduction and Findings

The County Office of Education retained Brion Economics, Inc. (BEI) in 2017 to conduct a Countywide Child Care Needs Assessment, which will be used for a variety of purposes. One of the main purposes of the assessment is to fulfill the State's requirement for each county to analyze the child care needs for infants, preschool, and school age children. This analysis is what we call a Child Care Supply and Demand Study, and estimates the demand for child care by age group and compares it to available supply of child care spaces. This study presents the analysis at the County level as well as the city and community level (see **Chapters 2 and 3**). BEI prepared a countywide-only study for Contra Costa County in 2012, and a detailed countywide and city level analysis in 2006 - 2007.

This study has been prepared for the Contra Costa County Local Planning Council in partnership with First 5 Contra Costa County. This study builds on our past work for the County in both 2012 and 2007. It is being prepared as part of a larger study concerning Child Care Facility Needs in the County and in combination with two online surveys on child care issues. The first online survey focused on child care providers. The results of this survey are discussed in **Chapter 4**. The second online survey targeted stakeholders in the County that have some relationship to providing child care facilities, or are involved in the development community, including public agencies and decision makers (see **Chapter 5**).

BEI has been conducting child care needs assessments and other planning studies since 2000, when the firm was initially formed. The firm has conducted more than 60 studies for a variety of clients, public and private, and regarding a variety of aspects of child care, including Economic Impact Studies, Preschool for All studies, Strategic Plans, and Facility Development Handbooks. However, child care needs assessments are our main focus regarding child care work.

Summary of Findings

- **Total Children:** In 2017, there were an estimated 1.12 million people in Contra Costa County, of which 195,500 were children ages birth to 12 years old, or 17.4% of total population. Overall, 75,100 or 38% of those children require licensed or license-exempt care, based on labor force participation rates (LFPRs) and licensed care demand factors, as discussed in more detail below.

Countywide	2017	2027	Net Change
Total Population	1,120,460	1,193,320	72,860
Total Employees	392,790	425,128	32,338
Total Children 0-12 years	195,517	208,397	12,880
0 to 2 Years	41,476	44,327	2,851
3 to 4 Years	33,857	36,125	2,269
School Age	120,185	127,945	7,760
Children 0 to 12 as % of Total Population	17.4%	17.5%	0.01%

- **Population Growth 2017 to 2027:** Overall, Contra Costa County will see an increase in population of 72,900 residents, or 6.5% between 2017 and 2027, for a total population of 1,200,000 in 2027. For children birth to 12 years old, there will also be an increase of 12,900 or 6.2%, for a total child population of 208,400.
- **Child care Supply:** There are approximately 39,800 child care spaces in Contra Costa County for children from birth to 12 years old.

Age of Children	FCCH Spaces	Center Spaces	# of Spaces	% of Supply
0 to 2 Years	1,933	1,459	3,398	9%
3 to 4 Years	3,866	14,861	19,085	48%
School Age	2,487	14,806	17,293	43%
Total Supply	8,286	31,126	39,776	100%

- **Total Demand for Child Care at 2017:** The total demand for licensed child care spaces as of 2017 equals about 75,200. The breakdown is 18% infants, 29% preschool, and 53% school age.

Age of Children	# of Spaces Needed	% of Demand
0 to 2 Years	13,368	18%
3 to 4 Years	21,739	29%
School Age	40,034	53%
Total Demand	75,141	100%

- **Infant Care Shortage:** In Contra Costa County, there is currently a shortage of almost 10,000 infant (birth to two years old) spaces with 25% of demand currently met. The shortage varies significantly by city.¹
- **Preschool Shortage:** For preschool age children (three to four years old²), there is a shortage of 2,700 spaces, with 88% of demand being met.³ The shortage varies significantly by city.

¹ Infants include children from birth through 2 years old.

² Preschool includes 3 and 4 year olds, as well as 25% of 5 year olds.

- **School Age Shortage:** For school age children (ages five to 12 years old), there is a shortage of 22,700 spaces in Contra Costa County. Approximately 43% of total demand is met with existing supply.⁴

Age of Children	Shortage of Spaces 2017	% of Demand Met 2017	Shortage of Spaces 2027	% of Demand Met 2027
0 to 2 Years	(9,970)	25%	(10,903)	24%
3 to 4 Years	(2,654)	88%	(4,135)	82%
School Age	(22,741)	43%	(25,371)	41%
Total Shortage/(Surplus)	(35,365)	53%	(40,408)	50%

- **Change Since 2012:** In 2012, there was a total shortage of 7,400 spaces with 88% of demand overall met. In 2017, the total shortage increased to 35,400.⁵ This is partly due the change in demand factors used in the two studies. Reallocation of two year olds to Infant and of some five year olds to School Age has changed the distribution of supply and demand.
- **Future Infant Demand in 2027:** By 2027, total demand for licensed child care spaces will increase to about 80,200 or by about 5,000 spaces without any new supply added to the market. This breaks down to a need for 14,300 infant spaces or an increase of 7%. Based on the current supply of spaces, there will be a shortfall of 10,900 infant spaces, with 24% of total demand met. This assumes no increase in the number of licensed or license-exempt spaces between 2017 and 2027.
- **Future Preschool Demand in 2027:** Demand for preschool spaces will be 23,200 with a shortfall of 4,100 preschool spaces; 82% of demand will be met, which is a 6% decrease in demand compared to 2017 conditions. This assumes no increase in the number of licensed or license-exempt spaces between 2017 and 2027.
- **Future School Age Demand in 2027:** For school age spaces, there will be an estimated demand for 42,700 spaces, creating a shortfall of 25,400 spaces in 2027; about 40% of demand will be met. Again, this assumes no increase in the number of licensed or license-exempt spaces between 2017 and 2027.

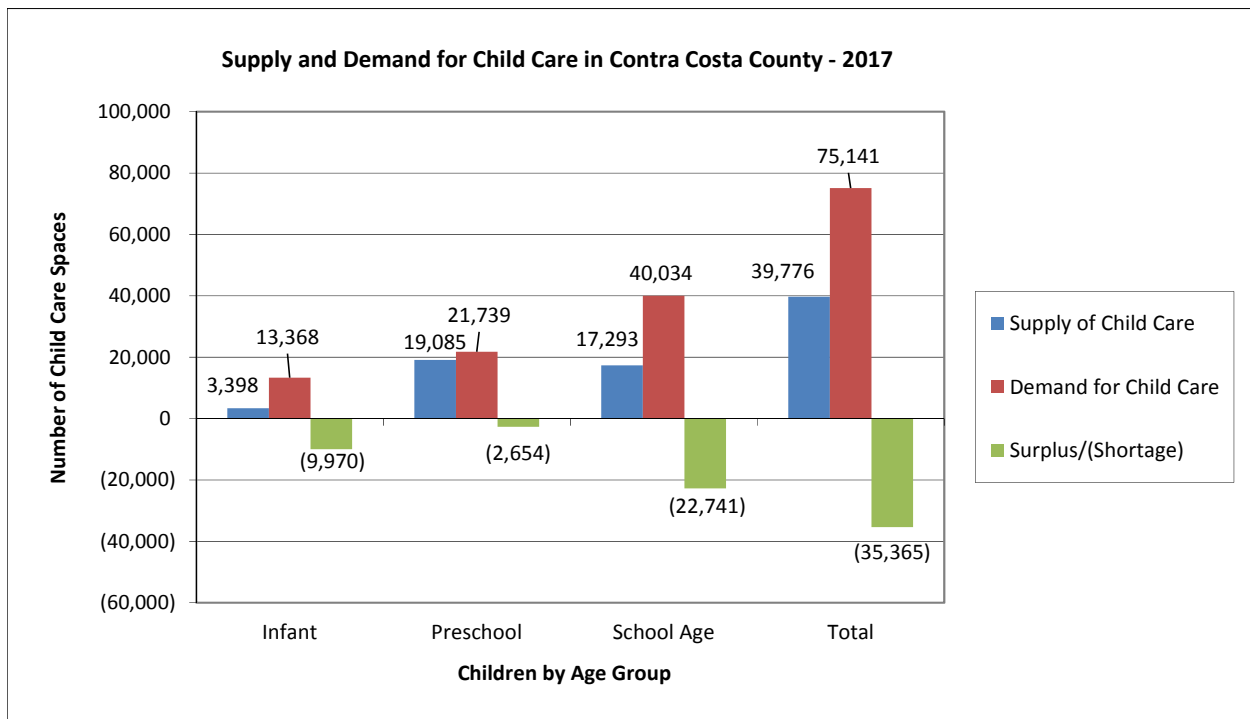
³ Demand for, or shortage of, spaces refers to licensed or license-exempt spaces.

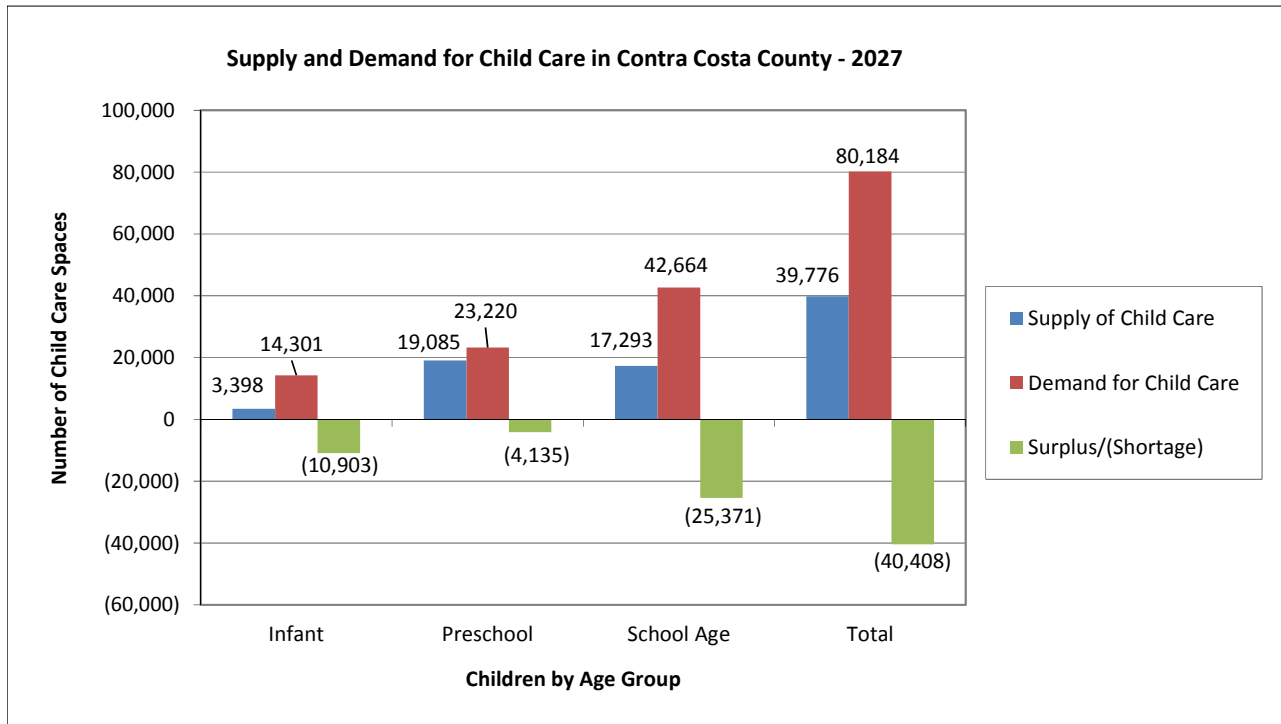
⁴ Ibid.

⁵ It should be noted that the demand factors used in 2012 were significantly less than those used in the 2017 study, which contributes to the significant shortages as compared to 2012. Two year olds have been moved to Infant and removed from Preschool.

Age of Children	# of Spaces Needed	% of Demand
0 to 2 Years	14,301	18%
3 to 4 Years	23,220	29%
School Age	42,664	53%
Total Demand	80,184	100%

The following graphics summarize the supply and demand data by type of care and year.





Acknowledgements

We would like to acknowledge the following organizations for their support in this effort:

- The Contra Costa County Child Care Resource and Referral Services agency (CocoKids)
- Contra Costa County, Conservation Department
- Contra Costa County Office of Education
- Contra Costa County Human Services Department
- Contra Costa County Planning and Advisory Council for Early Care & Education

2. Child Care Needs Assessment – 2017 to 2027

This chapter presents methodology, analysis, and results of the Child Care Needs Assessment for current conditions (2017) and future conditions (2027) for children from birth to 12 years old by city/area in Contra Costa County.

A summary of the child care supply and demand analysis findings are in **Chapter 1**. Please note that all **Chapter 2** tables are at the end of the Chapter.

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. The California Child Care Coordinators Association (CCCCA) adopted a set of general demand factors that is in use across the state for infants, toddlers, and school-aged children.⁶ However, they suggest that local jurisdictions should consider local conditions and develop demand factors that reflect conditions in their county and while Contra Costa County has used the recommended demand factors in prior studies, it has decided to use demand factors for this study that reflect observations and experiences of child care demand in our county. The demand rates we have chosen (50% for infant/toddler care, 100% for preschool care, and 50% for school-aged care) reflect information about current use of those types of care, as well as the County's belief that it is important that quality child care be available to all children who need it.⁷

Other urban counties, like San Francisco and San Mateo, have also taken a local approach to determine demand factors based on available data and value-based milestones that amplify access to child care in their community. The County believes this set of child care demand factors for licensed child care best reflects our local conditions.

The following table summarizes the rates used by age group in the 2007, 2012, and 2017 studies. While the County use of the higher demand factors included in this study is logical, it is

⁶ 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>.

⁷ This decision was made by the Contra Costa County Child Care Data Committee in March 2018.

important for BEI to make this change explicit so that readers who are reviewing our prior work understand why the resulting unmet demand has changed so significantly.

Year	Demand Factor for Licensed Care		
	Infants	Preschool	School Age
2018	50%	100%	50%
2013	37%	90%	39%
2007	37%	75%	39%

The 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 at 2017 and 2027. **Appendix A Tables 1 to 47** present Needs Assessment tables and the supporting data for each city/area individually for Existing Conditions (2017) and Future Conditions (2027).

Appendix A Tables 1 to 47 provide detailed analysis tables, one set for each of the 22 cities/areas analyzed for this study, and one for Contra Costa County as a whole under current 2017 and future 2027 conditions (see **Appendix A Tables 46 and 47**).

This study focuses on children ages 0 to 12 years old, with the following age ranges:

- Infants – children birth through 2 years old.
- Preschool – children ages 3 to 4 and 25% of 5 year olds.
- School Age – children ages 5 to 12 (including 75% of 5 year olds).

It is assumed that 75% of 5 year olds will be enrolled in kindergarten or transitional kindergarten and will not be generating demand for preschool age child care spaces.

Detailed demographic data for each city/area in 2017 is presented in **Appendix A, Table 48**. Households and employment are based on ABAG data, and the percentage of the population by age group for children birth to 12 years old is calculated from U.S. Census data (2010). **Appendix A, Table 49** presents the same detailed demographics estimates as **Appendix A, Table 48** for 2027.

Child Care supply in 2017 by city/area, type of care, and child age group is shown in detail in **Appendix A, Table 50**.

Summary of Supply and Demand

The Needs Assessment is focused on 19 incorporated cities and three other unincorporated areas, as shown in **Table 2-1**. The other three areas are Alamo-Blackhawk, Rodeo-Crockett, and East Rural Contra Costa County, as defined by the Association of Bay Area Governments (ABAG). As shown in **Table 2-1**, total population for Contra Costa County in 2017 is estimated at 1,120,000, based on calculating the average annual growth between 2015 and 2020 based on ABAG *Projections '13*. **Table 2-1** also shows population growth by city/area between 2017 and 2027. Overall, the County is expected to grow from 1,120,000 residents to 1,190,000, an increase of almost 73,000 or 6.5%. In terms of size, Concord will see the largest population growth in the County, with approximately 14,700 new residents, followed by Richmond with an estimated 10,300 new residents. The City of Hercules is projected to see the largest percentage increase of population at 13.9%. The City of Oakley is expected to see growth of 12.4%, followed by Concord at 11%.

Age Groupings

Table 2-2 calculates 2017 population by age group for all children under three years old, children three to four years old, and children five to 12 years old by city and by total. The breakdown of children by age is calculated based on data from the 2010 U.S. Census, which measures population by age. The percentage of children from birth to 35 months, from three to four years (including 25% of five year olds), and five to 12 years (including 75% of five year olds) was applied to current 2017 population figures to estimate the current number of children by age group. Countywide, there are approximately 41,500 children under the age of three years, 33,900 children ages three and four years old, and 120,200 children five to 12 years old, for a total of 195,500. Children ages 12 and under comprise approximately 17.4% of the total County population and this figure varies by city or area. By 2027, it is estimated that there will be 208,400 children ages 12 and under in the County, an increase of 12,900 children or an increase of 6.2% from 2017.

Child Care Supply

Table 2-4 summarizes current licensed and legally license-exempt⁸ child care supply by age group for Infants, Preschool, and School Age children by city/area as of August 2017, based on information provided by CocoKids. Supply data breaks down the number of spaces by age group and by city/area. It also shows what percentage of overall supply each city/area has as compared to the County overall. Concord and Richmond together have the greatest number and percentage of child care spaces, making up over 26% of the total number of spaces in the County. Countywide, there are approximately 3,400 Infant spaces, 19,100 Preschool spaces, and 17,300 School Age spaces, for a total of almost 39,800 spaces. Concord and Richmond together have almost 24% of the total children in the County as of 2017.

Child Care Demand

Demand is calculated by figuring the number of children by age group with working parents, based on applying labor force participation rates (LFPRs) for children under age six (from the 2015 5-Year American Community Survey) to the number of Infants and Preschoolers. LFPRs for six to 17 year olds are applied to the number of School Age children. This allows us to calculate the number of children in each of these age groups with working parents. Labor force participation rates include families with two working parents or a single parent who works.

Relevant demand factors are then applied to the number of children with working parents to determine the number of those children requiring licensed care, as discussed above. It is assumed that only a percentage of children with working parents require licensed care because some parents choose to have nannies, extended family, friends, or other arrangements for their children and are therefore not looking for a licensed child care space.

For Infants, a demand factor of 50% is applied to children with working parents. This is the demand factor that was provided by the data committee for this project. (The California Child Care Coordinators Association recommends a demand factor of 37% of infants for needs assessments. Infants include children from ages zero months to 35 months.)

For Preschool children, demand factors typically vary between 75% and 100% of children with working parents. At the direction of the data committee, we are using 100% of three and four year old children with working parents. Preschool numbers also include 25% of five year olds.

⁸ Legally license-exempt programs include programs run by City Park & Recreation programs, Co-operative/Parent Participation programs, school district programs, and federal migrant programs.

The demand factor for School Age children is 50% of children with working parents. This figure is 10% higher than the demand factor recommended by CCCCA but decided on by the data committee for this project as better reflecting Contra Costa County. School age children for this study include six to 12 year olds and 75% of five year olds.

Once demand is calculated, the percent distribution of total demand for spaces by age group is calculated as well as the percent of total children requiring licensed care.

The total demand for spaces by age group for both 2017 and 2027 is summarized in **Table 2-3**. At 2017, the City of Richmond shows the greatest demand for all age groups, needing almost 9,500 spaces. The City of Antioch follows, requiring over 8,400 spaces, with the City of Concord closely following in demand. Overall, countywide, there is demand for almost 13,400 infant spaces, 21,700 preschool spaces, and 40,000 school age spaces, or 75,100 spaces countywide in 2017.

In 2027, the demand in Richmond is still highest, with a continued 13% of the total demand, or 10,200 spaces. In 2027, countywide, it is expected that there will be a need for 14,300 infant spaces, 23,200 preschool spaces, and 42,700 school age spaces, for a total demand of almost 80,200 licensed child care spaces, or an increase of 5,000 spaces or 7%.

Tables 2-5 through 2-7 summarize the supply and demand by city/area for infants, preschoolers, and school age kids, respectively. For infants, there is a shortfall of almost 10,000 spaces, with 25% of current demand met (see **Table 2-5**). For preschool, there is a shortfall of 2,700 spaces with 88% of demand met (see **Table 2-6**). And for school age children, there is a shortfall of almost 22,700 spaces, with 43% of demand met (see **Table 2-7**).

Table 2-8 summarizes the supply and demand at 2017 for all age groups combined. Countywide there is a shortfall of almost 35,400 spaces, and 53% of total demand is met. That means: roughly one in two children that need a child care space could potentially find one. These rates vary significantly by city/area, however.

The number and type of child care providers by city/area is shown in **Table 2-9**. The number of family child care homes, licensed centers, and license-exempt centers are each listed by city/area. The City of Concord has the most total child care facilities at 170, followed by the City of Richmond with 163, and the City of Antioch with 133. In total, there are 824 family child care homes (FCCHs), 348 licensed centers, and 77 license-exempt centers in the County, for a total of 1,249 providers.

A summary of surplus/shortage by age group and city/area in 2017 (current conditions) is shown in **Table 2-10**. Overall, the shortage of infant care makes up 28% of the overall shortfall, preschool makes up 8%, and school age makes up 64% of the total shortfall of 35,400 spaces in Contra Costa County. The same data for 2027 (future conditions) is provided in **Table 2-11**. In 2027, the shortage is more significant because the supply of child care is not considered to increase from 2017, while population does increase. The total shortfall at 2027 is estimated at around 40,400 spaces. In reality, some additional supply will be created but it is difficult to predict how much or where it might occur.

Table 2-1
Population Growth by City 2017 and 2027 from ABAG
Contra Costa County Child Care Needs Assessment 2017

City/Area	Population at 2017	Population at 2027	CHANGE 2017 to 2027	
			2017 to 2027	% Change
Antioch	108,720	114,320	5,600	5.2%
Brentwood	54,380	56,560	2,180	4.0%
Clayton	11,300	11,600	300	2.7%
Concord	133,320	148,000	14,680	11.0%
Danville	45,580	46,880	1,300	2.9%
El Cerrito (1)	30,760	31,920	1,160	3.8%
Hercules	28,420	32,380	3,960	13.9%
Lafayette	26,420	27,480	1,060	4.0%
Martinez	44,380	45,760	1,380	3.1%
Moraga	16,860	17,600	740	4.4%
Oakley	41,780	46,940	5,160	12.4%
Orinda	18,320	18,960	640	3.5%
Pinole	31,040	32,360	1,320	4.3%
Pittsburg (1)	93,000	101,580	8,580	9.2%
Pleasant Hill (1)	41,440	42,800	1,360	3.3%
Richmond (1)	132,100	142,360	10,260	7.8%
San Pablo	35,440	37,600	2,160	6.1%
San Ramon	77,500	81,660	4,160	5.4%
Walnut Creek	87,240	92,680	5,440	6.2%
Alamo-Blackhawk	25,600	26,020	420	1.6%
Rodeo-Crockett	12,160	12,480	320	2.6%
Rural East County (1)	20,320	20,880	560	2.8%
Remainder	4,380	4,500	120	2.7%
Total	1,120,460	1,193,320	72,860	6.5%

(1) Population based on ABAG Projections 2013 for 2017.

Sources: ABAG Projections 2013; U.S. Census 2010; Brion Economics, Inc.

Table 2-2
 Population by Age Group by City 2017 and 2027
 Contra Costa County Child Care Needs Assessment 2017

City/Area	2017				Children 12 and Under as % of Population	2027				CHANGE 2017 to 2027			
	Birth to 2 Years Old	3 to 4 Years Old	5 to 12 Years Old	Total		Birth to 2 Years Old	3 to 4 Years Old	5 to 12 Years Old	Total	Birth to 2 Years Old	3 to 4 Years Old	5 to 12 Years Old	Total
Antioch	4,534	3,602	13,043	21,179	19.5%	4,767	3,788	13,715	22,269	234	186	672	1,091
Brentwood	2,105	1,929	7,672	11,706	21.5%	2,190	2,006	7,980	12,175	84	77	308	469
Clayton	262	1,283	1,806	3,351	16.0%	269	1,317	1,854	3,440	7	34	48	89
Concord	5,436	4,077	12,487	22,000	16.5%	6,034	4,526	13,862	24,422	599	449	1,375	2,422
Danville	1,170	1,193	5,675	8,037	17.6%	1,203	1,227	5,836	8,267	33	34	162	229
El Cerrito (1)	1,036	792	2,266	4,094	13.3%	1,075	822	2,351	4,248	39	30	85	154
Hercules	976	745	2,700	4,421	15.6%	1,112	849	3,077	5,037	136	104	376	616
Lafayette	704	690	2,997	4,391	16.6%	733	717	3,117	4,567	28	28	120	176
Martinez	1,334	1,010	3,726	6,070	13.7%	1,376	1,041	3,842	6,259	41	31	116	189
Moraga	285	348	1,610	2,243	13.3%	298	363	1,681	2,342	13	15	71	98
Oakley	1,876	1,444	5,505	8,825	21.1%	2,108	1,623	6,184	9,915	232	178	680	1,090
Orinda	439	458	2,229	3,127	17.1%	455	474	2,307	3,236	15	16	78	109
Pinole	955	700	2,593	4,248	13.7%	996	729	2,704	4,429	41	30	110	181
Pittsburg (1)	4,265	3,421	10,864	18,550	19.9%	4,658	3,737	11,867	20,262	393	316	1,002	1,711
Pleasant Hill (1)	1,313	1,069	3,438	5,820	14.0%	1,356	1,104	3,551	6,011	43	35	113	191
Richmond (1)	5,857	4,390	13,845	24,092	18.2%	6,312	4,731	14,921	25,964	455	341	1,075	1,871
San Pablo	1,736	1,339	4,259	7,334	20.7%	1,841	1,421	4,519	7,781	106	82	260	447
San Ramon	3,393	3,108	10,670	17,172	22.2%	3,575	3,275	11,243	18,094	182	167	573	922
Walnut Creek	2,065	1,712	6,266	10,042	11.5%	2,194	1,818	6,656	10,668	129	107	391	626
Alamo-Blackhawk	517	547	3,009	4,073	15.9%	525	555	3,059	4,139	8	9	49	67
Rodeo-Crockett	386	321	1,142	1,850	15.2%	396	330	1,172	1,899	10	8	30	49
Rural East County (1)	692	586	2,492	3,770	18.6%	711	602	2,561	3,874	19	16	69	104
Remainder	139	116	411	666	15.2%	143	119	423	685	4	3	11	18
Total by Age (2)	41,476	33,857	120,185	195,517	17.4%	44,327	36,125	127,945	208,397	2,851	2,269	7,760	12,880

Note: 2 year olds include up to 35 mo. 25% of 5 year olds are included in Preschool age, and 75% of 5 year olds are included in school age demand.

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

(2) Population projections based on ABAG Projections 2013 for 2017 and children as % of population based on the breakdown from the U.S. Census 2010.

Sources: ABAG Projections 2013; U.S. Census 2010; Brion Economics, Inc.

Table 2-3
 Child Care Demand Summary Table for 2017 and 2027
 Contra Costa County Child Care Needs Assessment 2017

City/Area	2017				City/Area as % of Total Demand	2027				City/Area as % of Total Demand
	Birth to 2 Years Old	3 to 4 Years Old	5 to 12 Years Old	Total Demand		Birth to 2 Years Old	3 to 4 Years Old	5 to 12 Years Old	Total Demand	
Antioch	1,505	2,392	4,531	8,428	11.2%	1,583	2,515	4,764	8,862	11.1%
Brentwood	687	1,258	2,618	4,564	6.1%	714	1,309	2,723	4,747	5.9%
Clayton	104	207	417	728	1.0%	107	212	429	747	0.9%
Concord	1,657	2,486	4,185	8,329	11.1%	1,840	2,760	4,646	9,246	11.5%
Danville	348	710	1,657	2,715	3.6%	358	730	1,705	2,793	3.5%
El Cerrito (1)	329	504	840	1,673	2.2%	342	523	871	1,736	2.2%
Hercules	382	584	1,030	1,996	2.7%	435	665	1,173	2,274	2.8%
Lafayette	191	375	953	1,520	2.0%	199	390	992	1,581	2.0%
Martinez	443	671	1,328	2,443	3.3%	457	692	1,369	2,519	3.1%
Moraga	90	220	499	809	1.1%	94	229	521	844	1.1%
Oakley	672	1,034	2,118	3,824	5.1%	755	1,162	2,380	4,296	5.4%
Orinda	97	203	589	889	1.2%	101	210	609	920	1.1%
Pinole	295	432	963	1,689	2.2%	307	450	1,004	1,761	2.2%
Pittsburg (1)	1,413	2,268	3,514	7,195	9.6%	1,544	2,477	3,838	7,859	9.8%
Pleasant Hill (1)	402	654	1,128	2,185	2.9%	415	676	1,165	2,256	2.8%
Richmond (1)	1,945	2,915	4,622	9,482	12.6%	2,096	3,142	4,981	10,219	12.7%
San Pablo	550	848	1,441	2,840	3.8%	583	900	1,529	3,013	3.8%
San Ramon	1,047	1,918	3,357	6,322	8.4%	1,103	2,021	3,537	6,661	8.3%
Walnut Creek	733	1,215	2,200	4,148	5.5%	779	1,291	2,337	4,406	5.5%
Alamo-Blackhawk	97	205	715	1,016	1.4%	98	208	727	1,033	1.3%
Rodeo-Crockett	120	199	441	760	1.0%	123	204	453	779	1.0%
Rural East County (1)	261	442	885	1,588	2.1%	268	454	909	1,631	2.0%
Total	13,368	21,739	40,034	75,141	100.0%	14,301	23,220	42,664	80,184	100.0%

Note: 2 year olds include up to 35 mo. 25% of 5 year olds are included in Preschool age, and 75% of 5 year olds are included in school age demand.

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: ABAG 2013; Census 2010; Brion Economics, Inc.

Table 2-4
Child Care Supply Summary Table for 2017 - Total Number of Spaces by Age
Contra Costa County Child Care Needs Assessment 2017

City/Area	Birth to 2 Years Old	3 to 4 Years Old	5 to 12 Years Old	Total Supply	City/Area as % of Total Supply
Antioch	354	1,535	1,119	3,008	7.6%
Brentwood	240	1,183	806	2,229	5.6%
Clayton	27	230	220	477	1.2%
Concord	430	2,742	2,513	5,685	14.3%
Danville	67	736	846	1,649	4.1%
El Cerrito (1)	108	850	339	1,297	3.3%
Hercules	55	165	429	649	1.6%
Lafayette	92	674	324	1,090	2.7%
Martinez	177	681	784	1,642	4.1%
Moraga	32	558	208	798	2.0%
Oakley	125	527	285	937	2.4%
Orinda	14	343	138	495	1.2%
Pinole	34	187	203	424	1.1%
Pittsburg (1)	239	1,893	1,566	3,698	9.3%
Pleasant Hill (1)	172	788	983	1,943	4.9%
Richmond (1)	607	2,248	2,122	4,977	12.5%
San Pablo	133	428	1,021	1,582	4.0%
San Ramon	220	1,226	1,542	2,988	7.5%
Walnut Creek	152	1,463	1,429	3,044	7.7%
Alamo-Blackhawk	10	257	154	421	1.1%
Rodeo-Crockett	88	237	36	361	0.9%
Rural East County (1)	22	134	226	382	1.0%
Total	3,398	19,085	17,293	39,776	100.0%

Note: 2 year olds include up to 35 mo. 25% of 5 year olds are included in Preschool age, and 75% of 5 year olds are included in school age demand.

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: CocoKids (formerly Contra Costa Child Care Council); Brion Economics, Inc.

Table 2-5
Total Infant Supply and Demand by City - 2017
Contra Costa County Child Care Needs Assessment 2017

City/Area	2017			
	Total Supply	Total Demand	Total Shortfall	% of Demand Met
Antioch	354	1,505	(1,151)	23.5%
Brentwood	240	687	(447)	34.9%
Clayton	27	104	(77)	26.0%
Concord	430	1,657	(1,227)	25.9%
Danville	67	348	(281)	19.3%
El Cerrito (1)	108	329	(221)	32.8%
Hercules	55	382	(327)	14.4%
Lafayette	92	191	(99)	48.0%
Martinez	177	443	(266)	39.9%
Moraga	32	90	(58)	35.5%
Oakley	125	672	(547)	18.6%
Orinda	14	97	(83)	14.4%
Pinole	34	295	(261)	11.5%
Pittsburg (1)	239	1,413	(1,174)	16.9%
Pleasant Hill (1)	172	402	(230)	42.8%
Richmond (1)	607	1,945	(1,338)	31.2%
San Pablo	133	550	(417)	24.2%
San Ramon	220	1,047	(827)	21.0%
Walnut Creek	152	733	(581)	20.7%
Alamo-Blackhawk	10	97	(87)	10.3%
Rodeo-Crockett	88	120	(32)	73.6%
Rural East County (1)	<u>22</u>	<u>261</u>	<u>(239)</u>	8.4%
Total	3,398	13,368	(9,970)	25.4%

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: ABAG 2013; Census 2010; Brion Economics, Inc.

Table 2-6
Total Preschool Supply and Demand by City - 2017
Contra Costa County Child Care Needs Assessment 2017

City/Area	2017			
	Total Supply	Total Demand	Shortfall/ Surplus	% of Demand Met
Antioch	1,535	2,392	(857)	64.2%
Brentwood	1,183	1,258	(75)	94.0%
Clayton	230	207	23	111.3%
Concord	2,742	2,486	256	110.3%
Danville	736	710	26	103.7%
El Cerrito (1)	850	504	346	168.7%
Hercules	165	584	(419)	28.3%
Lafayette	674	375	299	179.7%
Martinez	681	671	10	101.5%
Moraga	558	220	338	254.0%
Oakley	527	1,034	(507)	51.0%
Orinda	343	203	140	169.1%
Pinole	187	432	(245)	43.3%
Pittsburg (1)	1,893	2,268	(375)	83.5%
Pleasant Hill (1)	788	654	134	120.4%
Richmond (1)	2,248	2,915	(667)	77.1%
San Pablo	428	848	(420)	50.4%
San Ramon	1,226	1,918	(692)	63.9%
Walnut Creek	1,463	1,215	248	120.4%
Alamo-Blackhawk	257	205	52	125.5%
Rodeo-Crockett	237	199	38	119.2%
Rural East County (1)	<u>134</u>	<u>442</u>	<u>(308)</u>	30.3%
Total	19,085	21,739	(2,654)	87.8%

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: ABAG 2013; Census 2010; Brion Economics, Inc.

Table 2-7
Total School Age Supply and Demand by City - 2017
Contra Costa County Child Care Needs Assessment 2017

City/Area	2017			
	Total Supply	Total Demand	Total Shortfall	% of Demand Met
Antioch	1,119	4,531	(3,412)	24.7%
Brentwood	806	2,618	(1,812)	30.8%
Clayton	220	417	(197)	52.7%
Concord	2,513	4,185	(1,672)	60.0%
Danville	846	1,657	(811)	51.0%
El Cerrito (1)	339	840	(501)	40.4%
Hercules	429	1,030	(601)	41.7%
Lafayette	324	953	(629)	34.0%
Martinez	784	1,328	(544)	59.0%
Moraga	208	499	(291)	41.7%
Oakley	285	2,118	(1,833)	13.5%
Orinda	138	589	(451)	23.4%
Pinole	203	963	(760)	21.1%
Pittsburg (1)	1,566	3,514	(1,948)	44.6%
Pleasant Hill (1)	983	1,128	(145)	87.1%
Richmond (1)	2,122	4,622	(2,500)	45.9%
San Pablo	1,021	1,441	(420)	70.8%
San Ramon	1,542	3,357	(1,815)	45.9%
Walnut Creek	1,429	2,200	(771)	65.0%
Alamo-Blackhawk	154	715	(561)	21.5%
Rodeo-Crockett	36	441	(405)	8.2%
Rural East County (1)	<u>226</u>	<u>885</u>	<u>(659)</u>	25.5%
Total	17,293	40,034	(22,741)	43.2%

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: ABAG 2013; Census 2010; Brion Economics, Inc.

Table 2-8
Total Supply and Demand by City for Children 0 to 12 Years Old - 2017
Contra Costa County Child Care Needs Assessment 2017

City/Area	2017			
	Total Supply	Total Demand	Total Shortfall	% of Demand Met
Antioch	3,008	8,428	(5,420)	35.7%
Brentwood	2,229	4,564	(2,335)	48.8%
Clayton	477	728	(251)	65.5%
Concord	5,685	8,329	(2,644)	68.3%
Danville	1,649	2,715	(1,066)	60.7%
El Cerrito (1)	1,297	1,673	(376)	77.5%
Hercules	649	1,996	(1,347)	32.5%
Lafayette	1,090	1,520	(430)	71.7%
Martinez	1,642	2,443	(801)	67.2%
Moraga	798	809	(11)	98.6%
Oakley	937	3,824	(2,887)	24.5%
Orinda	495	889	(394)	55.7%
Pinole	424	1,689	(1,265)	25.1%
Pittsburg (1)	3,698	7,195	(3,497)	51.4%
Pleasant Hill (1)	1,943	2,185	(242)	88.9%
Richmond (1)	4,977	9,482	(4,505)	52.5%
San Pablo	1,582	2,840	(1,258)	55.7%
San Ramon	2,988	6,322	(3,334)	47.3%
Walnut Creek	3,044	4,148	(1,104)	73.4%
Alamo-Blackhawk	421	1,016	(595)	41.4%
Rodeo-Crockett	361	760	(399)	47.5%
Rural East County (1)	<u>382</u>	<u>1,588</u>	(1,206)	24.1%
Total	39,776	75,141	(35,365)	52.9%

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: ABAG 2013; Census 2010; Brion Economics, Inc.

Table 2-9
Number and Type of Child Care Providers by City in 2017
Contra Costa County Child Care Needs Assessment 2017

City/Area	Family Child Care Homes	Licensed Centers	License-Exempt Centers	Total
Antioch	110	16	7	133
Brentwood	55	27	1	83
Clayton	4	3	0	7
Concord	114	43	13	170
Danville	14	21	0	35
El Cerrito (1)	33	16	0	49
Hercules	20	4	1	25
Lafayette	3	14	1	18
Martinez	19	16	3	38
Moraga	4	7	2	13
Oakley	54	7	1	62
Orinda	6	6	1	13
Pinole	13	6	0	19
Pittsburg (1)	63	26	12	101
Pleasant Hill (1)	36	18	3	57
Richmond (1)	111	37	15	163
San Pablo	42	11	7	60
San Ramon	69	22	0	91
Walnut Creek	35	33	2	70
Alamo-Blackhawk	4	7	0	11
Rodeo-Crockett	5	6	0	11
Rural East County (1)	10	2	2	14
Countywide	824	348	71	1,243

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: CocoKids (formerly Contra Costa Child Care Council); Brion Economics, Inc.

Table 2-10
Summary of Supply and Demand of Child Care by Age Group and by City: 2017
Contra Costa County Child Care Needs Assessment 2017

City/Area	Child Care Surplus (Shortage) at 2017				
	Birth to 2 Years Old	3 to 4 Years Old	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Antioch	(1,151)	(857)	(2,008)	(3,412)	(5,420)
Brentwood	(447)	(75)	(522)	(1,812)	(2,335)
Clayton	(77)	23	(54)	(197)	(251)
Concord	(1,227)	256	(971)	(1,672)	(2,644)
Danville	(281)	26	(255)	(811)	(1,066)
El Cerrito (1)	(221)	346	125	(501)	(376)
Hercules	(327)	(419)	(746)	(601)	(1,347)
Lafayette	(99)	299	200	(629)	(430)
Martinez	(266)	10	(256)	(544)	(801)
Moraga	(58)	338	280	(291)	(11)
Oakley	(547)	(507)	(1,054)	(1,833)	(2,887)
Orinda	(83)	140	57	(451)	(394)
Pinole	(261)	(245)	(506)	(760)	(1,265)
Pittsburg (1)	(1,174)	(375)	(1,549)	(1,948)	(3,497)
Pleasant Hill (1)	(230)	134	(96)	(145)	(242)
Richmond (1)	(1,338)	(667)	(2,005)	(2,500)	(4,505)
San Pablo	(417)	(420)	(837)	(420)	(1,258)
San Ramon	(827)	(692)	(1,519)	(1,815)	(3,334)
Walnut Creek	(581)	248	(333)	(771)	(1,104)
Alamo-Blackhawk	(87)	52	(35)	(561)	(595)
Rodeo-Crockett	(32)	38	7	(405)	(399)
Rural East County (1)	(239)	(308)	(547)	(659)	(1,206)
Total County	(9,970)	(2,654)	(12,625)	(22,741)	(35,365)
Percent of Total	28.2%	7.5%	35.7%	64.3%	100.0%
Percent of Demand Met	25.4%	87.8%	64.0%	43.2%	52.9%

Note: 2 year olds include up to 35 mo. 25% of 5 year olds are included in Preschool age, and 75% of 5 year olds are included in school age demand.

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.
 Source: Brion Economics, Inc.

Table 2-11
Summary of Future Supply and Demand of Child Care by Age Group and City: 2027
Contra Costa County Child Care Needs Assessment 2017

City/Area	Child Care Surplus (Shortage) at 2027				
	Birth to 2 Years Old	3 to 4 Years Old	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Antioch	(1,229)	(980)	(2,209)	(3,645)	(5,854)
Brentwood	(474)	(126)	(600)	(1,917)	(2,518)
Clayton	(80)	18	(62)	(209)	(270)
Concord	(1,410)	(18)	(1,427)	(2,133)	(3,561)
Danville	(291)	6	(285)	(859)	(1,144)
El Cerrito (1)	(234)	327	93	(532)	(439)
Hercules	(380)	(500)	(881)	(744)	(1,625)
Lafayette	(107)	284	177	(668)	(491)
Martinez	(280)	(11)	(291)	(585)	(877)
Moraga	(62)	329	267	(313)	(46)
Oakley	(630)	(635)	(1,264)	(2,095)	(3,359)
Orinda	(87)	133	46	(471)	(425)
Pinole	(273)	(263)	(537)	(801)	(1,337)
Pittsburg (1)	(1,305)	(584)	(1,889)	(2,272)	(4,161)
Pleasant Hill (1)	(243)	112	(131)	(182)	(313)
Richmond (1)	(1,489)	(894)	(2,383)	(2,859)	(5,242)
San Pablo	(450)	(472)	(923)	(508)	(1,431)
San Ramon	(883)	(795)	(1,678)	(1,995)	(3,673)
Walnut Creek	(627)	172	(454)	(908)	(1,362)
Alamo-Blackhawk	(88)	49	(40)	(573)	(612)
Rodeo-Crockett	(35)	33	(2)	(417)	(418)
Rural East County (1)	(246)	(320)	(566)	(683)	(1,249)
Total County	(10,903)	(4,135)	(15,037)	(25,371)	(40,408)
Percent of Total	27.0%	10.2%	37.2%	62.8%	100.0%
Percent of Demand Met	23.8%	82.2%	59.9%	40.5%	49.6%

Note: 2 year olds include up to 35 mo. 25% of 5 year olds are included in Preschool age, and 75% of 5 year olds are included in school age demand.

(1) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Source: Brion Economics, Inc.

3. State-Mandated Needs Assessment

In preparing the 2017 Needs Assessment for Contra Costa County, Brion Economics, Inc. (BEI) followed the LPC Child Care Needs Assessment: Instruction Guide for Completing the Aggregate County Report. We used the suggested data sources, as well as additional sources of information as needed. Below is an explanation of the tables, as numbered in the table format found in the LPC Child Care Needs Assessment. The table numbers correlate to the section numbers in the Needs Assessment report form generated by the LPC and document how the numbers in the Needs Assessment report were derived. The formal needs assessment can be found in **Appendix B**.

Table 3-1 shows the total population, and number of children ages 0 to 12 in Contra Costa County. The total population data is based on ABAG's *Projections 2013* for 2017, which is the most **recent** data available. Totals for each age group—Infants (0 to 2 years), Preschool (3 to 4 years), and School Age (5 to 12 years)—are listed at the bottom, and are based on the breakdown of population by age based on data from the 2010 U.S. Census, which is the most recent data available. For this study, 25% of 5 year olds are included in the Preschool category and 75% are included in School Age.

Table 3-1 also shows the percentage of each age as compared to total children ages 0 to 12 years and to the population as a whole. By group, Infants make up 21.2% of children ages 0 to 12 and 3.7% of the County's population, Preschoolers comprise 17.3% of children ages 0 to 12 and 3.0% of the County's population, and School Age children make up 61.5% of children ages 0 to 12 years and 10.7% of the County's population.

Table 3-2 shows the breakdown of race/ethnicity for the population ages 0 to 12 years old. Children who are Hispanic/Latino make up 35.0% of the 0 to 12 population in Contra Costa County, followed by White children at 31.7% of the population and Asian American with 12.5%. Data in **Table 3-2** is based on data from the California Department of Education.

Table 3-1
Children by Age, 0-12 Years Old for 2017
Contra Costa County Needs Assessment - 2017 Update

Age in Years (1)	2017 Population	% of Children 0-12 Years	% of Total Population	2012 Population	% Population Change 2012 to 2017
0	13,363	6.8%	1.2%	12,473	7.1%
1	13,560	6.9%	1.2%	12,764	6.2%
2	14,553	7.4%	1.3%	13,586	7.1%
3	15,222	7.8%	1.4%	14,269	6.7%
4	14,826	7.6%	1.3%	13,926	6.5%
5	15,232	7.8%	1.4%	14,275	6.7%
6	15,424	7.9%	1.4%	14,427	6.9%
7	15,368	7.9%	1.4%	14,362	7.0%
8	15,368	7.9%	1.4%	14,443	6.4%
9	15,436	7.9%	1.4%	14,778	4.5%
10	15,811	8.1%	1.4%	14,831	6.6%
11	15,495	7.9%	1.4%	14,582	6.3%
12	<u>15,858</u>	<u>8.1%</u>	<u>1.4%</u>	<u>14,785</u>	<u>7.3%</u>
Total Ages 0-12	195,517	100.0%	17.4%	183,502	6.5%
Total Contra Costa County Population	1,120,460			1,049,025	6.8%
Total Infants (0-2 years)	41,476	21.2%	3.7%	38,823	6.8%
Total Preschool (3-4 years) (2)	33,857	17.3%	3.0%	31,764	6.6%
Total School Age (5-12 years)	120,185	61.5%	10.7%	112,914	6.4%

(1) Population estimates are from "ABAG Projections 2013" for 2017. Percent age breakdown based on U.S. Census 2010.

(2) The 2012 Needs Assessment had different age groupings: Preschool included 5 year olds, 75% of which are now included in School Age. 25% of 5 year olds are counted as Preschool in this study.

Sources: ABAG; U.S. Census 2010; Brion Economics, Inc.

Child Population by Language reflects the primary language spoken (other than English) by children in grades K to 12 in Contra Costa County and is summarized in **Table 3-3**. Data on language spoken is from the California Department of Education's DataQuest database (www.cde.ca.gov). This data set is not available for children ages 0 to 5 years old, but it is assumed that the K to 12 data is reflective of the language spoken by households with younger children in the County. Spanish makes up the greatest percentage (22.9%) of primary language spoken, followed by Filipino (1.3%), and Mandarin (1.2%). Overall, 28.5% of children in Contra Costa County speak a primary language other than English.

Table 3-2
Children Ages 0-12 Years by Race/Ethnicity for 2017
Contra Costa County Needs Assessment - 2017 Update

Race/Ethnicity	No. of Children 0-12 Years	% of Total Children 0-12 Years
Hispanic/Latino	68,431	35.0%
American Indian/Alaskan Native	587	0.3%
Asian American	24,440	12.5%
Pacific Islander	1,173	0.6%
Filipino	8,212	4.2%
African American	18,183	9.3%
Multiracial	10,558	5.4%
White, Not Hispanic	61,979	31.7%
Not reported	1,955	1.0%
Total	195,517	100.0%

(1) Data from California Department of Education; 2016-17.
 Sources: California Department of Education; Brion Economics, Inc.

Table 3-3
Children In Grades K-12 by Language Spoken (Excluding English) for 2016-17
Contra Costa County Needs Assessment - 2017 Update

Language	Number of Children K-12	Percentage of Children who Speak Languages Other Than English	Percentage of Total Children
Spanish	40,678	67.17%	22.93%
Filipino	2,306	3.81%	1.30%
Mandarin	2,040	3.37%	1.15%
Cantonese	1,211	2.00%	0.68%
Farsi	1,167	1.93%	0.66%
Vietnamese	1,133	1.87%	0.64%
Arabic	1,032	1.70%	0.58%
Korean	943	1.56%	0.53%
Other	<u>10,047</u>	<u>16.59%</u>	N/A
Total	60,557	100.00%	28.5%

Sources: California Department of Education DataQuest Report for 2016-17 for Contra Costa County; Brion Economics, Inc.

The number of children with an Individual Family Service Plan (IFSP) or Individualized Education Plan (IEP) is broken down by age group in **Table 3-4**. IFSPs are for families with children younger than 3 years and IEPs are for children ages 3 and up. Data for Infants and Preschoolers was provided by Care Parent Network in Contra Costa County. For School Age children, data is not available as of 2017. There are currently 860 Infants with IFSPs, and 1,700 Preschoolers with IEPs in Contra Costa County.

Table 3-4
Children with an IFSP or IEP by Age Group for 2017
Contra Costa County Needs Assessment - 2017 Update

Age	0-2 Years	3-4 Years	5-12 Years	Total	Percent of Total
Total (IFSP or IEP) (1)	860	1,700	NA	2,560	1.3%

Data provided by Deborah Penry, Care Parent Network, for 2017.

(1) Children 3 years and up have Individualized Education Plans (IEPs) and children under 3 have Individual Family Services Plans (IFSPs).

Sources: Care Parent Network; Brion Economics, Inc.

Table 3-5 should provide data on the number of children in Child Protective Services by age group and the number of CPS children referred for child care. Unfortunately, this data could not be obtained for this study for Contra Costa County.

Table 3-5
Children in Child Protective Services System and Number Referred-2017
Contra Costa County Needs Assessment - 2017 Update

Age	0-2 Years	3-4 Years	5-12 Years	Total
Number of Children in Child Protective Services (1)	n/a	n/a	n/a	n/a
Number of Children Referred for Child Care Services	n/a	n/a	n/a	n/a

(1) Data for Child Protective Services was not available for this study.

Sources: California Child Welfare Indicators Project, UC Berkeley; Brion Economics, Inc.

The number of children in families on CalWORKs by age group is shown in **Table 3-6**. Data for CalWORKs Stage 1 show a total of 976 children receiving assistance, with 322 infants and 654 children ages 3 to 12. CalWORKs Stage 1 data was provided by Contra Costa County - Employment and Human Services Department. The data for CalWORKs Stages 2 and 3 is provided by CocoKids. There are a total of 2,037 children in CalWORKs Stages 2 and 3 for children ages 0 to 12 years old, for a total of 3,013 children assisted by CalWORKs.

Table 3-6
Children in Families on CalWORKs by Age Group for 2017
Contra Costa County Needs Assessment - 2017 Update

Age	0-2 Years	3-4 Years	5-12 Years	Total 0-12 Years
CalWORKs Stage 1 (1)	322	288	366	976
CalWORKs Stage 2 (2)	291	333	428	1,052
CalWORKs Stage 3 (2)	117	210	658	985
Total CalWORKs	730	831	1,452	3,013

(1) CalWORKs Stage 1 data provided by Contra Costa County - Employment & Human Services Department, June 2018. 3-4 year olds may include some 5 year olds in the only data available.
 (2) Data on CalWORKs Stage 2 and 3 provide by Margaret Weigart-Jacobs, CocoKids, 2017.
 Sources: CocoKids; Contra Costa County - Employment and Human Services Department;
 Brion Economics, Inc.

Table 3-7 calculates the number of children in families by income category and age group. Based on the American Community Survey 5-Year Estimates (2016), the percentage of families with incomes below the poverty level in the past 12 months for children under 5 years (13.5%) is applied to the total number of Infants (0 to 2 years) and Preschoolers (3 to 4 years). The percentage of families with incomes below the poverty level in the past 12 months for children ages 5 to 17 years (12.6%) is applied to School Age children (5 to 12 years). These percentages are multiplied by the total number of children in each age group to calculate the number of children in families with incomes below the poverty level. There are currently approximately 5,600 Infants, 4,600 Preschoolers, and 15,100 School Age children in families with incomes below the poverty level in Contra Costa County, for a total of 15,000 children 0 to 12, or 12.9% of all children.

In addition, **Table 3-7** calculates the number of children in families earning less than 70% of State Median Income (SMI). This data is from the Early Learning Needs Assessment Tool by the American Institutes for Research and based on ACS data for 2016. For Infants, 37.1% or 15,400 live in families earning less than 70% of SMI. For Preschool age children, this number is approximately 37.6% and 12,700 children, and for School Age, it is 36.8% or 44,300 children. Overall, approximately 72,400 children in Contra Costa County live in families earning less than 70% of SMI; this is 37% of all children ages 0 to 12. Lastly, **Table 3-7** also calculates the number of children by age group who live in families earning more than 70% SMI, which totals 123,114 children.

Table 3-7
Number of Children in Families by Income Category and Age Group
Contra Costa County Needs Assessment - 2017 Update

Age		0-2 Years	3-4 Years	5-12 Years	Total
Total Children by Age Group		41,476	33,857	120,185	195,517
% of Families with Children Whose Income was In the Past Year Below Poverty Level	(1)	13.5%	13.5%	12.6%	12.9%
# of Families with Children Whose Income was In the Past Year Below Poverty Level		5,599	4,571	15,143	25,313
% of Children in Families earning less than 70% of State Median Income	(2)	37.1%	37.6%	36.8%	37.0%
# of Children in Families Earning less than 70% of State Median Income		15,396	12,744	44,264	72,404
Children in Families with Incomes Above 70% SMI	(2)	26,080	21,113	75,921	123,114

(1) This data is from the American Community Survey 5-Year Estimates 2016.

(2) This data is from the Early Learning Needs Assessment Tool compiled by American Institutes for Research.

The percentage used here is based on numbers from the American Community Survey for Contra Costa County, according to the American Institutes for Research for 2016. The children in families earning less than 70% of State Median Income also include the children living below the poverty level.

Sources: ABAG; American Community Survey 5-Year Estimates 2016; American Institutes for Research; Brion Economics, Inc.

Data for children from migrant families is shown in **Table 3-8**. If 50% or more of a family's income comes from migrant labor, they are considered a migrant family in terms of this data, which was provided by the California Migrant Education Program, located in the San Joaquin County Office of Education. As of 2017, there are 4 children ages 0 to 12 years old from migrant families in Contra Costa County, all of whom are School Age.

Table 3-8
Number of Children in Migrant Families for 2017
Contra Costa County Needs Assessment - 2017 Update

Age	0-2 Years	3-4 Years	5-12 Years	Total
Children in Migrant Worker Families (1)	0	0	4	4
Percent Distribution	0%	0%	100%	100%

(1) Data for Contra Costa County provided by Manuel Nunez, Director II, Migrant Education, San Joaquin County Office of Education, 2018.

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

Table 3-9 estimates the number of children by age group whose families work and are eligible for subsidized child care and development. Applying the Labor Force Participation Rates from

the ACS 5-Year Survey (2016) for children in households with two working parents or a single parent that works to the number of families earning less than 70% of SMI (see **Table 3-7**) calculates the number of children eligible for subsidized care. It is estimated that 47,461 children ages 0 to 12 or 24.3 % qualify for subsidized care in Contra Costa County.

Table 3-9
Number of Children in Families at or Below 70% of SMI with Working Parents
Contra Costa County Needs Assessment - 2017 Update

Age	0-2 Years	3-4 Years	5-12 Years	Total
Total Number of Children by Age Group	41,476	33,857	120,185	195,517
Children at or Below 70% of SMI (1)	15,396	12,744	44,264	72,404
Labor Force Participation Rates (2)	63.9%	63.9%	66.6%	
Children at or Below 70% of SMI with Working Parents	9,838	8,143	29,480	47,461

(1) Number of children from AIR data, 2016.

(2) Labor force participation rates from American Community Survey, 2016.

Sources: ABAG; American Community Survey 5-Year Estimates 2016; American Institutes for Research 2016; Brion Economics, Inc.

Child care demand for children in households with working parents is calculated in **Table 3-10**. The total number of children by age group is multiplied by the Labor Force Participation Rates (63.9% for children under 6 years and 66.6% for children 5 to 17 years⁹) to calculate the number of children with working parents (either two working parents or a single parent who works). The number of children with working parents is then multiplied by the percentage of children who need licensed care by age group (50% for Infants, 100% for Preschool, and 50% for School Age). These percentages of demand were developed by the Local Planning Council based on local knowledge and conditions. Based on these calculations, it is estimated that 75,141 children ages 0 to 12 years require licensed care in Contra Costa County or 38.4% of children overall.

⁹ This is based on the age breakdown provided by the U.S. Census. LFPRs reported for children under 6 years old are applied to Infants and Preschool; LFPRs reported for children 6 to 17 years old are applied to School Age.

Table 3-10
Estimated Number of Children in Families Where All Parents/Guardians Work 2017
Contra Costa County Needs Assessment - 2017 Update

Age	0-2 Years	3-4 Years	5-12 Years	Total
Number of Children by Age Group	41,476	33,857	120,185	195,517
Labor Force Participation Rates	63.9%	63.9%	66.6%	66.0%
Children With Working Parents	26,599	21,713	80,698	129,009
% Children Needing Licensed Care	50%	100%	50%	58%
Children Needing Licensed Care	13,368	21,739	40,034	75,141

Sources: ABAG; American Community Survey 5-Year Estimates 2016; American Institutes for Research 2016; Brion Economics, Inc.

Table 3-11 and 3-12 (one table which refers to Sections 11 and 12 in the Needs Assessment form) calculates the demand for part-time Preschool for children that have at least one non-working parent (Section 11) and also demand for part-time Preschool for low-income children (Section 12). The total number of 3 and 4 year olds is shown; this figure is then reduced by the number of children in working families. This results in 12,144 children that are ages 3 and 4 years¹⁰ and have at least one non-working parent. Applying the 37.6% of families below 70% SMI to that figure results in 4,571 children ages 3 and 4 in families earning less than 70% of SMI and with one non-working parent. Because this table calculates children with at least one non-working parent, this is used to consider demand for part-time Preschool care instead of full-time care. This figure represents children that may require subsidies for part-time child care. Part-time care is considered important for kindergarten-readiness and for all of the benefits of early care and education, but does not represent “child care” for all families in terms of the Needs Assessment, which focuses on the need for full-time child care. It should be noted that some of these parents may desire or need their Preschool age child to be in full-time care as well for reasons other than employment.

¹⁰ In this study, Preschool age children include 25% of 5 year olds.

Table 3-11 and 3-12
Demand for Part Day State Preschool for 3 and 4 Year Olds - 2017
Contra Costa County Needs Assessment - 2017 Update

Item	3-4 Years Old	Notes
Total Preschool Children Countywide (1)	33,857	
Number of Children in Working Families	21,713	
Number of 3- & 4-Year Olds With At Least One Non-Working Parent	12,144	Section 11
% of Children in Families earning less than 70% of State Median Income	37.6%	
Number of 3- & 4-Year Olds With At Least One Non-Working Parent Earning Less than 70% SMI	4,571	Section 12

(1) Preschool includes 25% of 5-year-olds.

Sources: American Community Survey 5-Year Estimates 2016; ABAG; Brion Economics, Inc.

Licensed capacity at centers and family child care homes is shown in Section 13. **Table 3-13** presents the number of licensed child care center spaces by age. As shown, there are a total of 24,595 spaces in child care centers, with 60% defined as Preschool.

The calculations used to derive the number of licensed spaces at Family Child Care Homes (FCCH) are also shown in **Table 3-13**. CocoKids provided the number of licensed FCCHs. Family Child Care home spaces by age are defined by licensing regulations.

As of August 2017, there are 491 small FCCHs and 333 large FCCHs. For small FCCHs, it is assumed that each one has an average of 2 Infant spaces, 4 Preschool spaces, and 2 School Age spaces.¹¹ This equals a total of 982 infant spaces, 1,964 Preschool spaces, and 982 School Age spaces for a total of 3,928 spaces at small FCCHs in Contra Costa County. For large FCCHs it is assumed that each one has an average of 3 infant spaces, 6 Preschool spaces, and 5 School Age spaces. This equals a total of 993 Infant spaces, 1,998 Preschool spaces, and 1,665 School Age spaces in the County for a total of 4,656 spaces for children at large FCCHs. This provides a total of 8,584 licensed spaces at all Family Child Care Homes in the County. It is important to note that all FCCHs do not always fill all of their licensed spaces and at these rates. This is an estimate of total potential supply of FCCHs spaces.

¹¹ These distributions are averages, based on licensing requirements by the State; actual FCCHs may have their own preference on distribution. For instance some FCCHs may choose not to serve Infants and/or School Age children.

Table 3-13
Capacity at Licensed and License-Exempt Child Care Centers and Family Child Care Homes (FCCHs)
Contra Costa County Needs Assessment - 2017 Update

Age	# of Providers	0-2 Years	3-4 Years	5-12 Years	Total
Child Care Centers					
Licensed Child Care Centers	348	1,459	14,861	8,275	24,595
Percent Distribution		6%	60%	34%	100%
License-Exempt Centers	77	6	358	6,531	6,895
Percent Distribution		0.1%	5%	95%	100%
Total Center Spaces by Age	425	1,465	15,219	14,806	31,490
		5%	48%	47%	100%
FCCHs					
Spaces at Small FCCH (1)	491	982	1,964	982	3,928
Spaces at Large FCCH (1)	333	951	1,902	1,505	4,358
Total FCCH Spaces by Age	824	1,933	3,866	2,487	8,286
Percent Distribution		23%	47%	30%	100%
TOTAL CHILD CARE SUPPLY	1,249	3,398	19,085	17,293	39,776
Percent Distribution		9%	48%	43%	100%

(1) Assumes 8 licensed spaces for small FCCHs and 14 spaces for large FCCHs.

Sources: CocoKids; Brion Economics, Inc.

Table 3-14 shows the maximum reimbursement rates, and average cost of child care for part-time and full-time care at licensed centers and Family Child Care Homes. Reimbursement rates are from the California Department of Education, for 2017. The average child care Preschool space at a center is \$210 per week, for full-time care, with maximum reimbursement rates of \$338 for full-time care and \$261 per week for part-time care. In FCCHs, the average Preschool cost for full-time care is \$174 per week, while the maximum state reimbursement rate is \$229 per week for full-time care and \$179 per week for part-time care. Average rates for Infant and School Age care are also shown. Average costs refer to data from the California Child Care Resource & Referral Network 2015, which is the most recent available. Rates by location in the county may vary greatly.

Table 3-14
Weekly Cost of Care by Age Group and Facility Type
Contra Costa County Needs Assessment - 2017 Update

Age		Year of Data	Infants 0-2 Years	Preschool 3-4 Years	School Age 5-12 Years
Center-Based Care					
Center Full-Time Maximum Reimbursement Rates	(1)	2017	\$416	\$338	\$216
Center Full-Time Average	(2)	2015	\$288	\$210	na
Center Part-Time Maximum Reimbursement Rates	(1)	2017	\$310	\$261	\$142
Family Child Care Homes					
FCCH Full-Time Maximum Reimbursement Rates	(1)	2017	\$252	\$229	\$171
FCCH Full-Time Average	(2)	2015	\$190	\$174	na
FCCH Part-Time Maximum Reimbursement Rates	(1)	2017	\$195	\$179	\$138

(1) Maximum reimbursement data from <http://www3.cde.ca.gov/rcsc/index.aspx>. CDE data was viewed October 2017 and current as of January 1, 2017.

(2) Full time average weekly costs for centers and FCCHs from California Childcare Resource and Referral Network:

https://d3n8a8pro7vhmx.cloudfront.net/rrnetwork/pages/204/attachments/original/1499103375/All_Counties_Final.pdf?1499103375

Sources: California Department of Education; California Child Care Resource & Referral Network; Brion Economics, Inc.

The capacity to serve children who are eligible for subsidized care is calculated in **Table 3-15**. The American Institutes for Research Early Learning Needs Assessment Tool for 2016 report provided numbers for CSPP, CCTR Alternative Payment, Handicap, Migrant, and FCCHEN. Data from CocoKids provided Stage 1 CalWORKs, Stage 2 and 3 CalWORKs, Head Start and Early Head Start numbers for Contra Costa County. As of the 2016 /17 academic year, there were 14,004 children ages 0 to 12 enrolled in some form of subsidized care in the County.

Table 3-16 determines the shortfalls and surpluses in child care availability for the various populations included in the Needs Assessment. One data item that is calculated is the unmet need for child care for children by age group who require full-time care because they have working parents. This is calculated by taking the number of total children with working parents who need licensed care, as calculated in **Table 3-10**, and subtracting that from the number of licensed spaces for that age group.

Table 3-15
Income Eligible Children Enrolled in Programs
Contra Costa County Needs Assessment - 2017 Update

Age	Year of Data	Infants 0-2 Years	Preschool 3-4 Years	School Age 5-12 Years	Total
Center-Based (General) Program (CCTR) (1)	2016	387	36	288	711
CSPP (1)	2016	na	1,359	65	1,424
FCCHEN (1)	2016	0	1	2	3
Migrant (1)	2016	0	0	0	0
Handicap Program (1)	2016	0	0		0
Alternative Payment (1)	2016	142	160	67	369
CalWORKs Stage 1 (2)	2017	322	288	366	976
CalWORKs Stage 2 (2)	2017	291	333	428	1,052
CalWORKs Stage 3 (2)	2017	117	210	658	985
Head Start (2)	2017	na	1,380	na	1,380
Early Head Start (2)	2017	573	na	na	573
Other (ASES and other school age license-exempt programs)	2017			6,531	6,531
Total		1,832	3,767	8,405	14,004
Percent Distribution		13%	27%	60%	100%
Demand for Subsidized Care by Age (See Table 9)					
Children at or Below 70% of SMI with Working Parents		9,838	8,143	29,480	47,461
Surplus/(Shortage) of Subsidized Care		(8,006)	(4,376)	(21,075)	(33,457)
Percent of Demand Met		19%	46%	29%	30%

(1) Data from American Institutes for Research Early Learning Needs Assessment Tool for 2016.

(2) Head Start, Early Head Start, and CalWORKs Stages 1, 2 and 3 data provided by Margaret Weigart Jacobs, CocoKids.

Sources: American Institutes of Research 2016; CocoKids; Brion Economics, Inc.

The results show shortages of 9,970 infant spaces, 2,654 Preschool spaces, and 22,741 School Age spaces for a total shortage of 35,365 spaces. **Table 3-16** also calculates unmet need for children who need full-time care and are eligible for subsidies. It shows that there are almost 58,400 children who qualify for subsidized care between the ages of 0 to 12 years and for which there is not an available subsidized child care space. Currently 19% of children 0 to 12 who qualify for subsidies are served with some sort of subsidized care or about 1 child out of 5. There is also a shortage of almost 4,600 part-time Preschool spaces for children ages 3 to 4 years who need subsidies and would attend for enrichment purposes.

Table 3-16
Countywide Unmet Need for Subsidized Care by Type of Care and By Age (1)
Contra Costa County Needs Assessment - 2017 Update

Type of Care Needed	Infants 0-2 Years	Preschool 3-4 Years	School Age 5-12 Years	Total
Need for Full-Time Care for Working Parents - Surplus/(Shortage)	(9,970)	(2,654)	(22,741)	(35,365)
% of Unmet Need for Full-Time Working Parents (% of children for whom there are no spaces)	75%	12%	57%	47%
Full-Time Care Because of Work and Eligible for State Subsidy (total number of eligible children from low-income working families)	15,396	12,744	44,264	72,404
# of Available Subsidized Spaces	1,832	3,767	8,405	14,004
# of Eligible children for whom there is no subsidy	13,564	8,977	35,859	58,400
% of Unmet Need for those who Work and are Eligible for State Subsidy (% of eligible children for whom there is no subsidy)	88%	70%	81%	81%
Demand (Unmet Need) for Part-Time preschool care for enrichment/school readiness (2)		8,377		
Unmet Need as % of Demand for Part-Time preschool care for enrichment/readiness		69%		
Demand (Unmet Need) for Part-Time preschool care for enrichment/school readiness and eligible for state subsidy (3)		4,571		
Unmet Need as % of Demand for Part-Time preschool care for enrichment/school readiness and eligible for state subsidy		40%		

(1) This table and its calculations are based on a detailed worksheet provided by the Child Care Coordinators Association and was not developed by Brion Economics, Inc.

(2) This figure includes need for half-day preschool for all families regardless of income with at least one parent at home. This includes Head Start, CSPP, and other 1/2 day licensed programs.

(3) This is the number of 3 and 4 year olds with at least one non-working parent and in household earning less than 70% SMI. See Tables 11 & 12.

Source: Brion Economics, Inc.

Table 3-17 summarizes the total child care supply and demand by age group for the entire County. The top of the table calculates the existing demand for child care based on the total number of children by age group in the County, and applies labor force participation rates to those totals to determine the number of children with working parents. Percentages are then applied to those numbers to determine the number of children by age group who require licensed care.

In the County, there are 13,400 Infants, 21,700 Preschool children, and 40,000 School Age children requiring licensed care, or a total of 75,100 children, 0 to 12 years old. Comparing this to current supply, the total surplus/shortfall of licensed spaces by age group is calculated. Currently in Contra Costa County, there is a shortage of almost 10,000 infant spaces, 2,700 Preschool spaces, and 22,700 School Age spaces, for a total shortfall of approximately 35,400 spaces for all children ages 0 to 12 years in the County. This shortage excludes supply provided by programs run by City recreation and park programs, YMCAs, and other unlicensed child care. **Table 3-17** also shows total shortfall for subsidized care. Shortages for subsidized spaces total 33,500 across all ages, with 30% of demand being met by existing supply.

Table 3-17
Existing Child Care Demand and Supply in 2017 in Contra Costa County
Contra Costa County Needs Assessment - 2017 Update

CONTRA COSTA COUNTY	No. of Providers	Child Care as of 2017			
		0-2 Years or Infant	3 to 4 Years or Preschool	5 to 12 Years or School Age	Total, 0 to 12 Years
EXISTING DEMAND					
		Child Care Demand			
Estimated Total Children	(1)	41,476	33,857	120,185	195,517
Avg. Labor Force Participation Rates	(2)	64%	64%	67%	66%
Children With Working Parents		26,599	21,713	80,698	129,009
% Children Needing Licensed Care	(3)	50%	100%	50%	58%
Total Demand for Child Care Spaces		13,368	21,739	40,034	75,141
% Distribution of Total Demand for Spaces by Age Group		18%	29%	53%	100%
% of Total Children Needing Licensed Care		32%	64%	33%	38%
EXISTING SUPPLY					
	(4)				
Family Child Care Home Supply	(5)	Child Care Spaces			
Licensed for 8	491	982	1,964	982	3,928
Licensed for 14	333	951	1,902	1,505	4,358
Child Care Center Supply	348	1,459	14,861	8,275	24,595
Other License Exempt Programs	77 (6)	6	358	6,531	6,895
Current Child Care Supply	1,249	3,398	19,085	17,293	39,776
Percent Distribution		9%	48%	43%	100%
EXISTING SURPLUS/(SHORTAGE)					
		(9,970)	(2,654)	(22,741)	(35,365)
Percent Distribution		28%	8%	64%	100%
Percentage of Demand Met by Existing Facilities/Spaces		25%	88%	43%	53%
DEMAND FOR SUBSIDIZED CARE					
Children at or Below 70% of SMI with Working Parents		9,838	8,143	29,480	47,461
Surplus (or shortage) of Subsidized Care		(8,006)	(4,376)	(21,075)	(33,457)
Percent of Subsidized Demand Met		19%	46%	29%	30%

Note: County totals are based on the sum of the totals for each of the cities in the study.

- (1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.
- (2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.
- (3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.
- (4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.
- (5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

4. Child Care Provider Survey Findings

Summary of Key Findings

A quarter of the 1250 licensed child care programs in Contra Costa County responded to an invitation to an online survey designed to explore child care supply, demand, and facilities issues. Of these:

1. **Private and Faith-Based Locations** - Child care center facility ownership was most often within the private or faith-based sector.
2. **Strong Ownership** - 64% of center-based programs and 72% of Family Child Care Homes (FCCHs) own their facilities.
3. **Stability** - The average tenure of centers in a single location was 23 years. The average tenure of FCCHs was 12 years.
4. **Overall Good Facility Conditions** - Center directors reported facilities overall in adequate or good repair. About 7% anticipated imminent need to address structural issues. A quarter of the FCCHs had facility renovations underway at the time of the survey.
5. **Enrollments** - 76% of centers and 69% of FCCHs are within 90% of their target enrollments.
6. **Expansion** - More than a third of centers and FCCHs would consider expansion. The most frequently identified challenges by centers was finding a site and qualified staff. For FCCHs the greatest challenge was cost, a site, and qualified staff.

Introduction

The Contra Costa County Local Planning Council contracted with Brion Economics, Inc. to conduct a child care needs assessment and facilities study. This included a supply and demand analysis and survey research. Brion Economics and Davis Consultant Network conducted two online surveys of child care providers. One was directed to center directors, and the other to licensed family child care providers. The family child care home provider (FCCH) survey was provided in both Spanish and English.

The surveys were designed to:

1. Collect information related to child care supply and demand in Contra Costa County;
2. Better understand the status of early learning facilities;
3. Identify providers with interest in program expansion; and
4. Understand issues which related to expansion.

All Contra Costa County licensed and license-exempt child care and preschool providers were invited via a personalized email to respond to the linked survey.

Sample

CocoKids, the Contra Costa County Child Care Resource and Referral Services agency, provided a list of 1,250 licensed child care providers. The 849 contacts with email addresses (68% of all licensees) were invited to respond to the survey. Fifty-eight percent of contacted center directors and 32% of family child care home (FCCHH) providers completed the survey, representing 25% of all licensed providers. This was considered a very strong response rate.

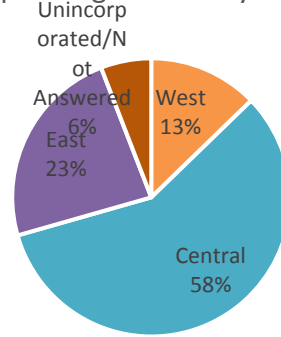
License Type	Licensed	w/Emails	Responses	% of Total Licensed	Response Rate
Center	445	179	102	23%	58%
Family Child Care Home	805	670	204	25%	30%
TOTAL	1,250	849	307	25%	36%

Responses were collected between September 25, 2017 and January 30, 2018.

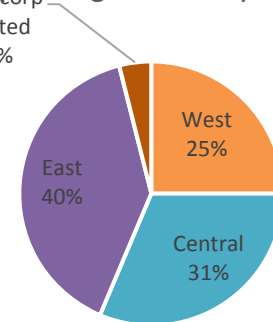
Responses were collected from all Contra Costa County municipalities and regions.

Region	City	Centers	FCCHs
West	El Cerrito	3	4
	Hercules	1	9
	Pinole	2	2
	Richmond	5	31
	San Pablo	2	5
Central	Alamo	0	1
	Clayton	0	1
	Concord	18	25
	Danville	7	7
	Lafayette	6	2
	Martinez	4	2
	Moraga	0	1
	Orinda	0	2
	Pleasant Hill	8	9
	San Ramon	1	5
	Walnut Creek	15	9
East	Antioch	6	35
	Brentwood	14	15
	Oakley	1	16
	Pittsburg	3	15
Unincorporated/No Answer		6	8
Total		102	204

Responding Centers by Region

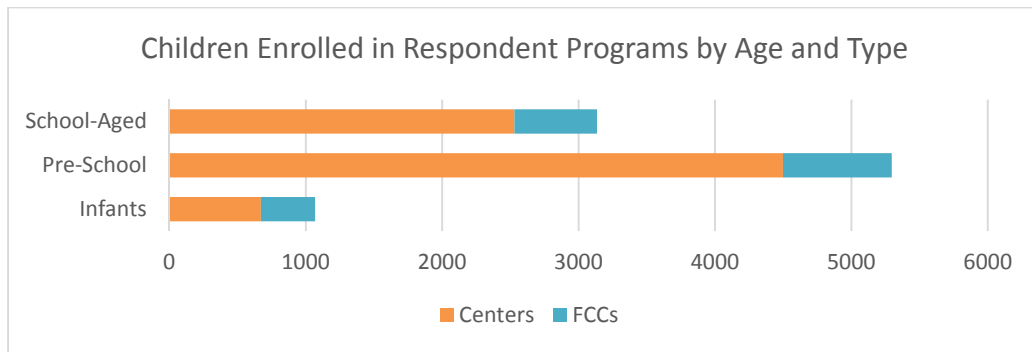


Responding FCCHs by Region



Collectively, responding programs care for nearly 9,500 children in Contra Costa County.

- Reporting Centers care for 671 infants, 4,498 preschool age children, and 2,530 school age children.
- Reporting FCCHs care for nearly 400 infants, 800 preschool age children, and 600 school age children.



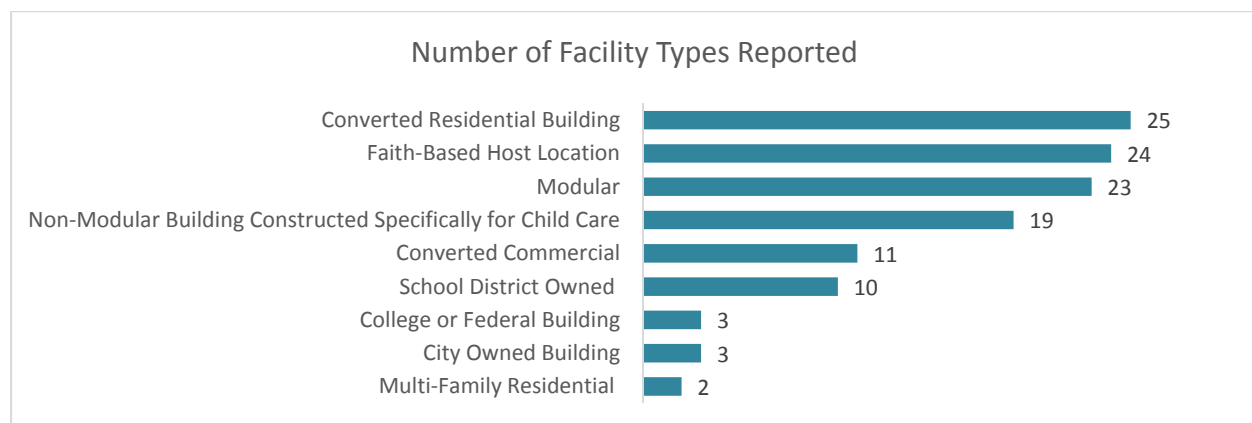
Child Care Center Findings

Public Funding

Fifty-eight percent of reporting sites have some public funding. This included four state preschools, three Head Start programs, and 45 other sites that offer state-subsidized care for eligible families through Cal-Works or the California Alternative Payment (CAP) program.

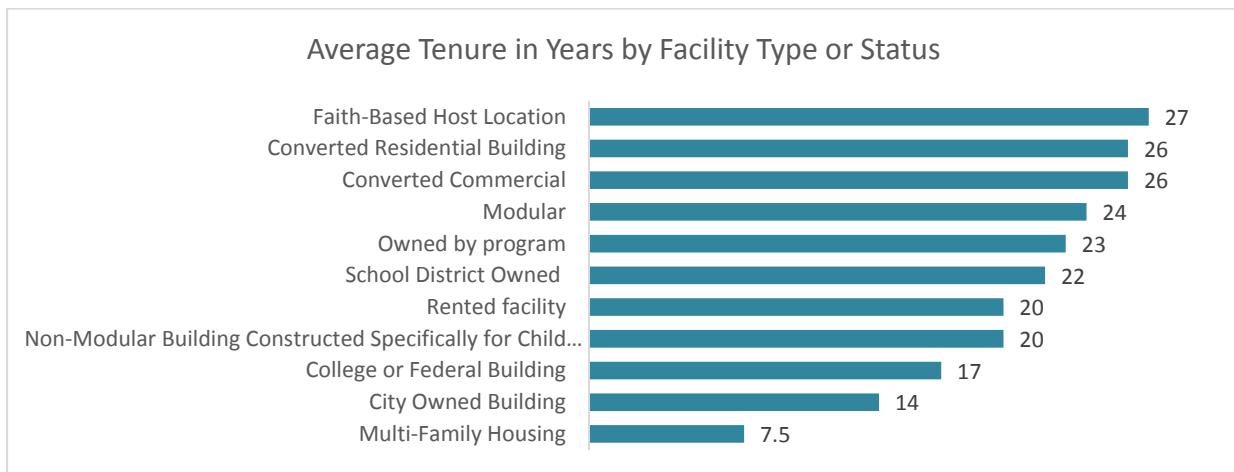
Building Type, Ownership, and Tenure

Responding center directors have programs housed in a variety of facility types, with most centers being housed in converted residential buildings (25%), on faith-based campuses (23%), in a modular building (22%), or in a non-modular building constructed for child care (18%).¹² Only 16% of responding sites were situated in public facilities of which 10% were housed by a school district, 3% in a city-owned facility, and 3% in a community college or federal building.



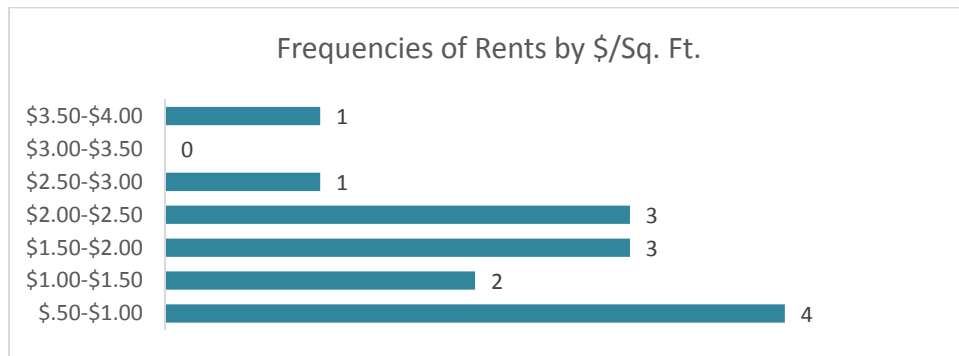
¹² Please note, respondents could select multiple building types, therefore the percentages add up to more than 100%.

Center directors reported that their program had been housed in its current location from 1 to 75 years, with an average tenure of 23 years. The period of greatest center expansion was 1988-2007. The greatest stability in facility ownership has been through faith-based organizations and private ownership.



Thirty-six percent of programs rent their facility. Reported rents ranged from \$1 to \$15,474 per month.¹³ Rent per square foot was calculated for the 13 renters that reported both figures. It ranges from \$0.55 to \$3.91 per square foot, with an average of \$1.71 per square foot. Two centers report they are losing their leases, and another seven have concerns that their lease may not be renewed.

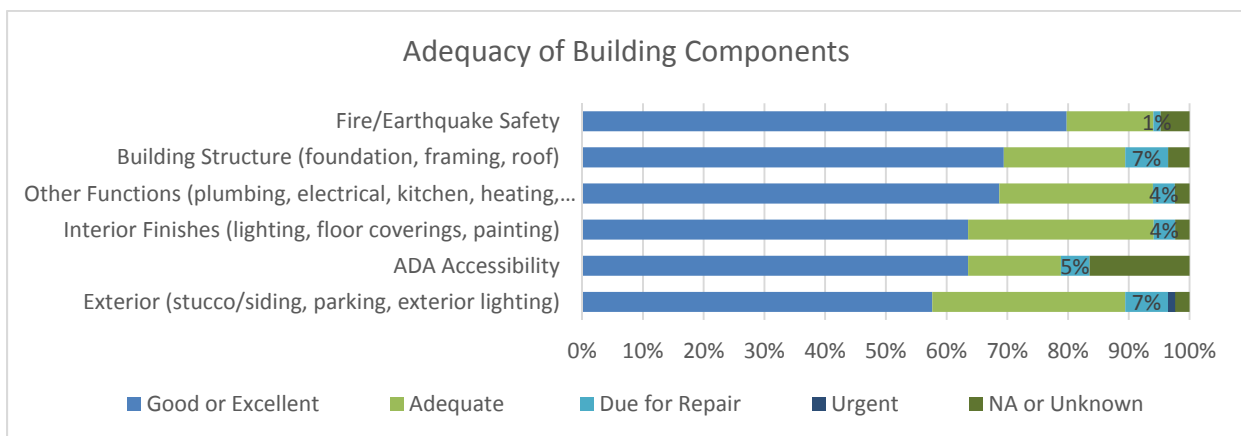
¹³ On 3.16.18, an email was sent to the director of this site requesting verification.



Site Conditions, Repairs, and Renovations

One in five sites are actively involved in site repairs or renovations. Projects mentioned included plumbing (new water heaters, sewage repairs); site expansion; installation of playground equipment; roofing; painting; landscaping; and insulation. Cost was the main factor for deferred maintenance.

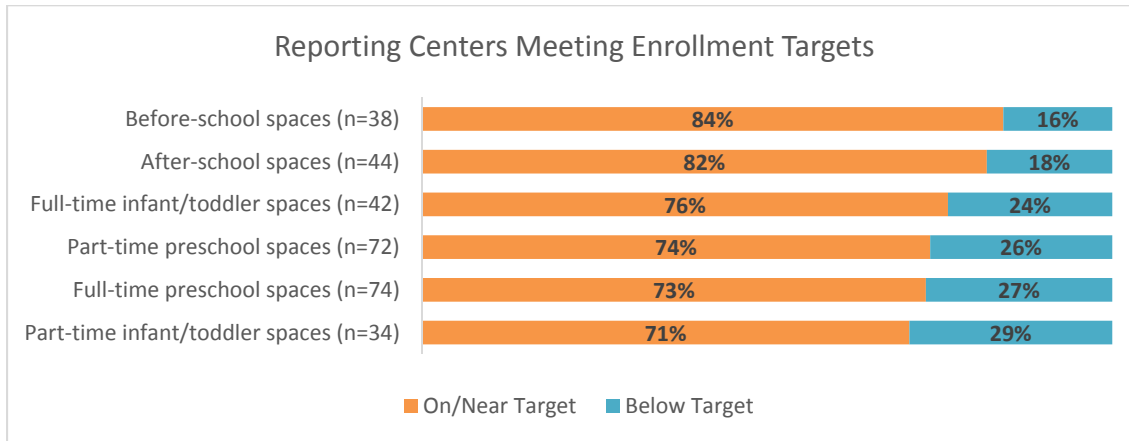
Overall, sites reported well-maintained facilities. The category most frequently reported as having repair due was the building exterior (stucco, siding, parking, exterior lighting). Some respondents noted that they are housed in older buildings.



Waitlists & Enrollment Targets

Respondents were asked “How well are you meeting your target enrollment for each of the following?” Depending on type of spaces, 71 to 84% of responding programs were within 90% of their target

enrollments. Programs for school age care and full-time infant/toddler care were most often near capacity.



Fifty-eight percent of sites reported that they maintain a waitlist.¹⁴

	Infant/Toddler (0-24 months)	Preschool (ages 2-5 years)	School Age (over 5 years of age)
Total	798	1,789	189
Range	1 to 500	1 to 1,000	1 to 50
Outlier Removed	298	789	189

Thirteen of reporting sites had expanded in the past five years to accommodate 76 more infant/toddler spaces, 38 preschool spaces, and 205 before or after school spaces. Their reported expenses to accommodate the expansion included: permitting fees in the \$500 to \$600 range; furnishings in the \$1,000 to \$10,000 range; facility rental; and expenses related to additional staff. Some were required to participate in public hearings or getting school district approval. Sites that found available space reported few challenges. Retrofitting for requisite plumbing fixtures was reported by two as a major expense.

Public Funding

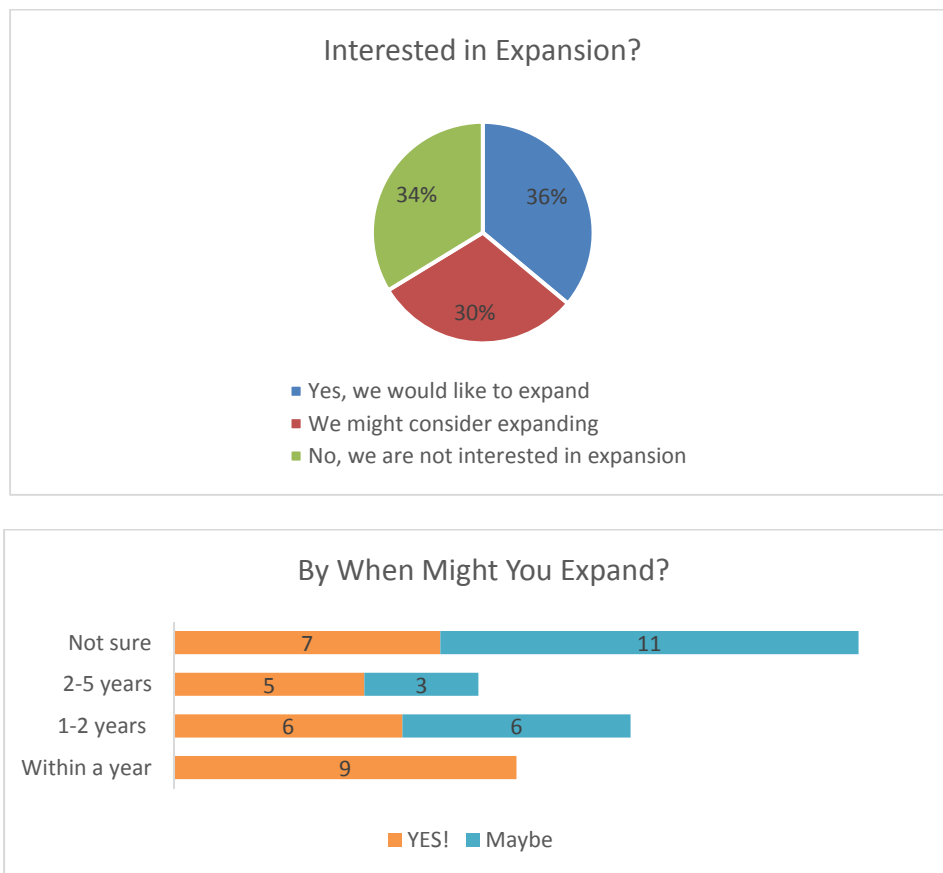
Fifty-eight percent of centers reported some public funding. This included four state preschools, three Head Start programs, and 45 sites that enrolled 239 children with CocoKids managed subsidies. This funding includes both the CalWORKs and California Alternative

¹⁴ One Head Start director from Concord reported waitlists of 500 infant/toddlers and 1,000 preschool aged children. She has been emailed requesting more information. Her numbers were deleted from the bottom row of the table above.

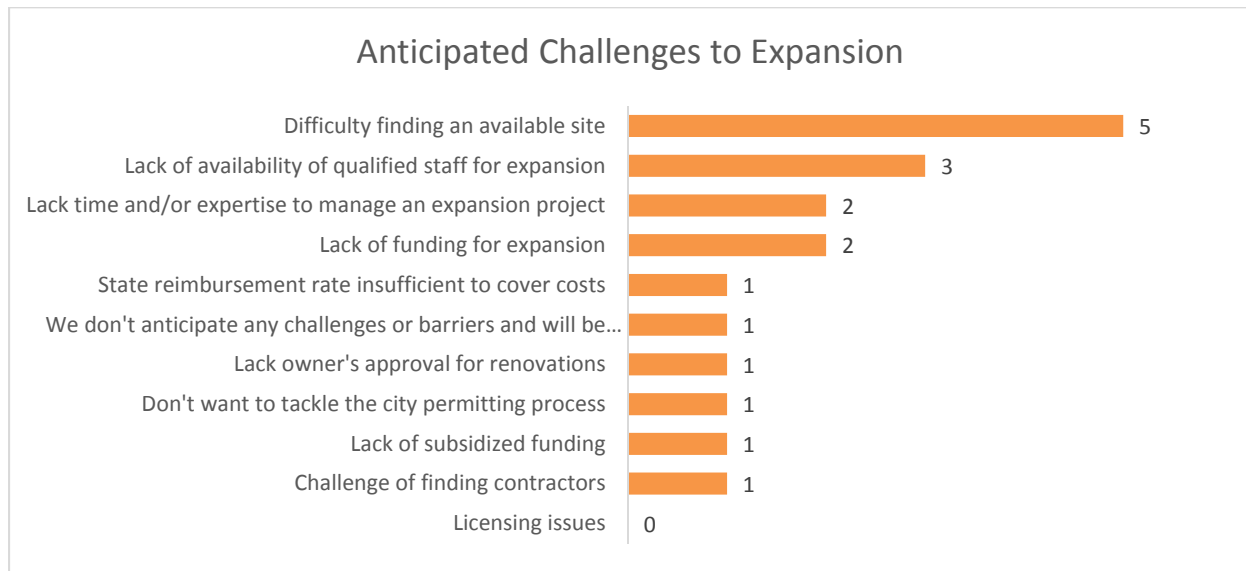
Payment (CAP) subsidy programs. Sixty percent of sites reported that the public funding adequately covered the cost of care. Where the subsidy does not meet expenses, sites supplement with parent fees, higher fees from non-subsidized families, fundraising, or they take a loss.

Interest in Expansion

One question asked “Would you or your organization/business consider expanding to serve more children in Contra Costa County at this or another location? (Note: this question is not limited to the site you have been describing in previous responses.) Of the 86 directors who answered this question, they were fairly evenly divided between those that would like to expand, those who would consider expansion, and those with no interest in expansion.



Of the nine sites that are considering expanding within the year, only one anticipated no barriers to proceeding. The most anticipated challenges were difficulty finding space, finding qualified staff, having the time and/or expertise to manage an expansion, and having the funds to expand. Nine directors offered suggestions for available sites.



The following centers granted permission to be listed in this report as interested in expansion.

Region	Center
West County	1. Hope Preschool, Richmond
Central County	2. St. Michael's Preschool, Concord
	3. Little Bridges Child Care, Danville
	4. Center of Gravity, Pleasant Hill
	5. Gan B'nai Shalom Preschool, Walnut Creek
	6. Walnut Avenue Community Christian Preschool, Walnut Creek
	7. My Spanish Village Preschools, Inc., Walnut Creek
East County	8. Sunshine Valley Childcare Center and Preschool, Antioch
	9. Baby Yale Academy, Brentwood

Closing Comments

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 the adequate supply of child care facilities in Contra Costa County for the years to come?”

Consider Distribution of Facilities	<i>We need a quality preschool in the area I am currently located, but we are being forced to move.</i>
Help with Affordable Facilities	<i>Finding space in this area is very expensive and hard to find.</i>

	<i>It would be great if there were incentives for small business owners to open/expand sites. We are non-profit and cannot seem to find a location that would work for us to expand, this has been challenging but without getting a real estate agent which I am not sure is the direction I want to go in, I'm not sure of another way. Thank you!</i> <i>We all need funding but more importantly we need spaces to rent/lease that we can afford. Rents are so high. It is shameful that we cannot afford to help children and families.</i>
Help with Early Start	<i>I would like to find out how to get about getting a contract for Early start.</i>
Infant & Toddler Care	<i>I would like to add an infant room for ages 6 weeks-12 months.</i> <i>Our County desperately needs more infant care!</i> <i>There seems to be a need in our area for infant care. We had looked at the possibility of starting one here years ago but the cost of starting an infant care scared away our church board from going any further with it.</i> <i>There's a huge need for 0-3-year old children.</i>
Is there really a shortage?	<i>I believe there are adequate spaces. Many sites I know of are not full. I believe at some time ago there was also a push for more sites (many in home daycares were open) this caused many sites to close because children were spread out too thin. This questionnaire seems to be aimed at this again.</i> <i>Yes, we currently need new children to serve.</i>
Let's Partner	<i>The Center of Gravity is committed to bringing high quality early education to Contra Costa County and making sure it is obtainable to all families. We are open to partnering to make that happen.</i>
Staffing	<i>Need continuous help with finding qualifying staff.</i>
Support for Expansion	<i>We providers need support for expanding and serve more children</i>
Thank you	<i>Continue to support schools and staff as you currently do! Thank you!!</i>

Family Child Care Provider Findings

About Family Child Care (FCCH)

The State of California requires licensing of child care offered in caregivers' homes. Family Child Care Homes (FCCHs). The licenses are classified for either a small, up to 8 children, or large family child care home up to 14 children. These classifications define maximum enrollments, depending on the ages of children.

Small FCCHs can select to have a maximum of: four infants or six children with no more than three who are infants; or up to eight children when one is school-aged and no more than two infants are in care.

The maximum enrollments of large FCCHs require an assistant and are limited to twelve children when no more than four are infants or up to fourteen children when one child is school-aged and no more than three infants are in care.

These variations in configuration provide flexibility for FCCH providers, but limit assessment of available spaces by age.

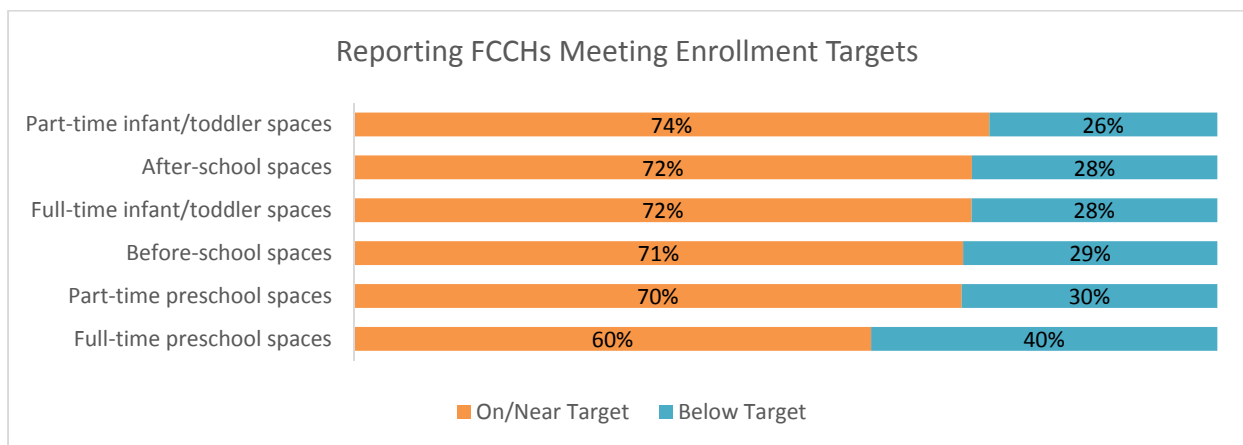
FCCH Survey Respondents

1. Of the completed surveys, 191 (88%) were collected through the English version and 25 (12%) from the Spanish translation.
2. Licensed capacity was evenly divided between small (53%) and large (47%) homes.
3. Respondents were currently providing care to nearly 400 infants, 800 preschool children, and just over 600 school-aged children.
4. The caregivers reported being in operation between 0 and 44 years, with an average of 12 years. The average number of years in the current location was 6 years.
5. 72% of the respondents owned their homes. Of the 28% who rent, they pay between \$1,200 and \$4,500 monthly, with an average rent of \$1,360 per month. Only two providers anticipated problems renewing the lease.

Waitlists & Enrollment Targets

Respondents were asked “How well are you meeting your target enrollment for each of the following?” Depending on type of spaces, 60 to 72% of responding FCCHs were meeting or nearly meeting their target enrollments. The group least likely to be at capacity was full-time preschool, for which 40% of respondents reported that they were below their targets

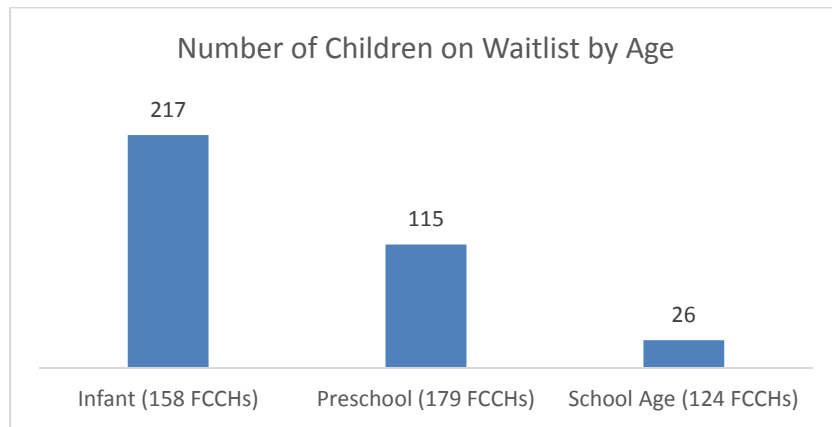
Overall FCCHs were less likely than centers to meet their target enrollments in all categories except part-time infant/toddler care, where they outperformed centers. This suggests the FCCHs are meeting a demand for this niche.



The survey asked “Approximately, how many children are on your wait list?” by age group. Eighty FCCHs (39%) had waitlists, which totaled to 358 children.

- Of those 158 sites with any infants currently enrolled, 40% (63) reported a total of 214 infants on their waitlist.
- Of the 179 sites with any preschool age children enrolled, 20% (35) reported a total of 115 children on their waitlists.
- Of the 124 sites with any school age children enrolled, 10% (12) reported a total of 26 school-aged children on their waitlists.

The waitlist findings support national and California trends in greatest supply shortage for infant care.

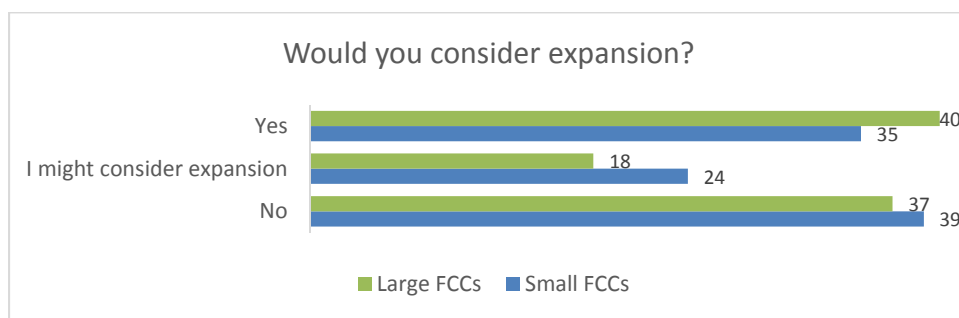


Site Repairs and Renovations

Nearly one in four (23%) of respondents reported that they were currently undergoing repairs or renovations to improve their home for the child care program. The renovations included landscape plantings, fencing, hardscape, climbing structures, exterior storage structures, painting, interior flooring, bathroom upgrades, lighting, and heating and air conditioning repair. Nearly half had researched renovations which they decided not to pursue. The most frequently reported barrier was a lack of funds.

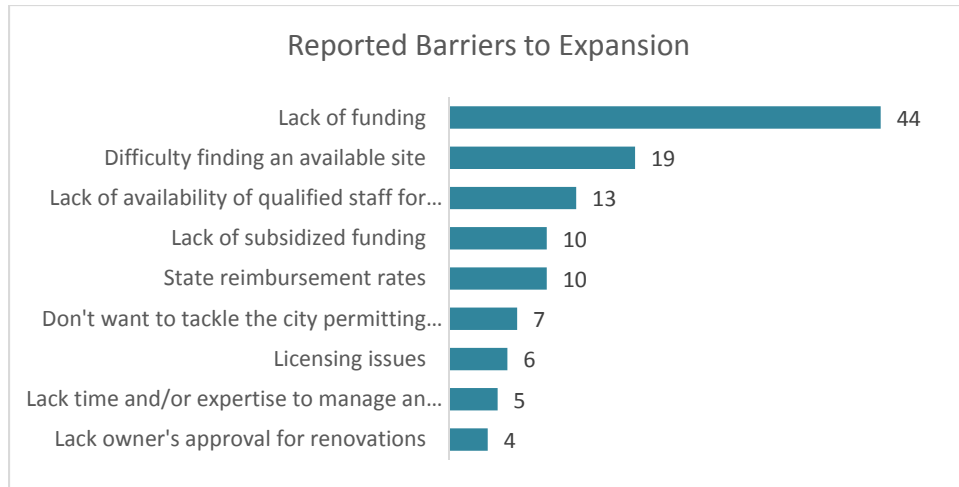
Interest in Expansion

Thirty-six percent of responding small FCCHs and 42% of large FCCHs expressed interested in expansion.



Of the 44 sites considering expanding within the next year, 25% don't anticipate any barriers to expansion. The barriers to expansion most frequently cited were lack of funding, difficulty finding a site, and difficulty finding staff. In addition to the offered selection of possible barriers, respondents offered additional reasons: high city permitting fees, being at licensed

capacity, preferring to operate as a FCCH rather than a center, low enrollments, fire marshal disallowing use of upstairs space, and objections of neighbors.



The following FCCHs gave permission to be listed in this report as having interest in expansion.

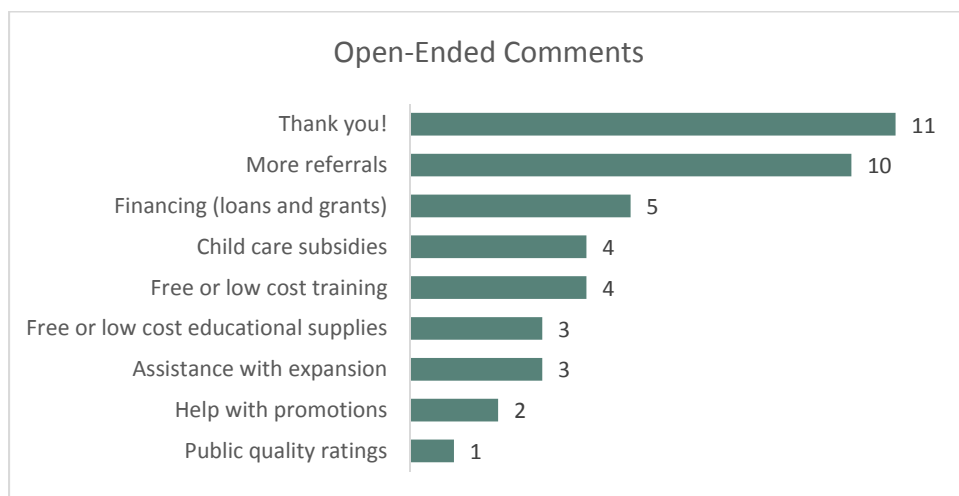
Region	City	FCCH Name
West	El Sobrante	1. Little Earth Seeds
		2. Lulu's Day Care
	Hercules	3. Kathy Duchaussee, Loving Arms Family Daycare
	Richmond	4. Nina's Day Care
		5. Veronicas Family Daycare
		6. S Family Day Care
		7. Little hands Family Child Care
		8. Dee's Tiny Tots University
		9. Kera's Family Quality Child Care
		10. Anielka Family Day Care
		11. Ricon de Luz
		12. Lollipops Family Daycare
		13. Nina's Day Care
		14. Carmen Diaz, Little Omar's Daycare
	San Pablo	15. Tiny Footprints
		16. Le'Sade Learning Academy
		17. Tiny Footprints
Central	Concord	18. Kesha Family Day Care
		19. Gin's Family Child Care
		20. Passion Polanco's Family Child Care
		21. Imagination Station Preschool

		22. Orellana's Daycare
		23. Nazli Sajjad
		24. Nekessa Joy Yanila, Little Montessori Home
		25. Linda Matus, Nana's Place
		26. Biana Kaplun
	Lafayette	27. De Colores Daycare
	Orinda	28. Rebecca Van Voorhis-Gilbert, Orinda Afternoons
	Pleasant Hill	29. Thelma Escobar
	San Ramon	30. Hope Win Academy
		31. Little Stars Day Care
		32. Norma's Kiddie Preschool, San Ramon
		33. ABC SunnyCare
		34. Lil Bears Preschool
		35. Crayoland Family Daycare
	Walnut Creek	36. Kids Kastle Childcare
		37. Mary's Family Child Care & Preschool
East	Antioch	38. 2nd Home Family Day Care
		39. Janell Collins
		40. Training Children Childcare & Learning Center
		41. Giggles & Scribbles Family Daycare
		42. One of a Kind Childcare
		43. Little Peeps
		44. Pringle's Christian Child Care Home
		45. 2 Cousins Day Care
		46. LaDasha Biagas-Wilson, 123 Ready Set Grow Academy
		47. Seasons Family Daycare
		48. Perry's House
		49. Tiny Precious Lambs Family Child Care
		50. Magical Moments Loving Daycare
		51. Little Ones Early Head Start
		52. Tasheena Family Childcare
		53. Michelle's Little Blossoms Daycare
		54. LOL Tots Daycare
		55. Ree Ree's Little Scholars
		56. Happy Faces Childcare
		57. Rosa'dar care
		58. Vilmary's Day Care
	Bay Point	59. Luv Muffins Daycare
		60. Mundo FUNtastico
		61. Nimberly's daycare
	Brentwood	62. Learning Through Play Family Daycare

		63. Pegah
		64. Kinder College Preschool/Childcare
		65. Tailila Scott, Momma Tees child care
		66. Keiki Care 123
	Oakley	67. Angela Engel (Angela's Angels)
		68. Dynasty Rose Family Child Care
		69. Alisa's "Beary Special Family" Childcare
		70. Happy Hearts
		71. God's Little Angels Daycare & Preschool
	Pittsburg	72. Frances Robinson (Franny the Nanny Daycare)
		73. Misty Little Angels
		74. Kamari's Family Daycare
		75. Happy Days Family Childcare & Preschool
		76. Gibson Family Childcare
		77. Patricia's Daycare

Other Comments

The survey concluded with an open-ended question “Do you have anything else you would like to tell us as we consider ways to ensure an adequate supply of child care facilities in Contra Costa County for the years to come?” The most frequent comment was gratitude for all assistance provided to the child care community. That was followed by a desire for referrals from CocoKids. Others observed the low profit margin for caregivers and suggested help with financing, free or low-cost teacher training, free or low-cost educational materials, and help with expansion and promotions. One person suggested all FCCHs have publicly available quality ratings.



5. Stakeholder Survey

Introduction

The Contra Costa County Local Planning and Advisory Council of Early Care and Education (LPC) in partnership with First 5 Contra Costa, Contra Costa County Office of Education (CCCOE), and Contra Costa County Conservation and Development Department contracted with Brion Economics, Inc. (BEI) to conduct a child care needs assessment and facilities study. This work included a supply and demand analysis and survey research. Brion Economics and Davis Consultant Network conducted two types of surveys: a child care provider survey and a stakeholder survey. This document summarized the findings for the latter.

Summary of Key Findings

1. Faith-based organizations and school districts are strategic partners for expansion of child care facilities. Most own their facilities and have complementary facility uses.
2. Cities in general have not broadly explored their potential role in facilitating expansion of child care facilities, with a few noted exceptions such as Concord's reduction of fees for licensed family child care providers. City planners are potential partners who hold local knowledge of potential sites and could be approached to help develop collaborative solutions.
3. There is widespread awareness that many sectors will need to be engaged to address the development of child care facilities to meet the projected demand.

Sample and Method

The survey was designed to:

- Build awareness of the projected shortages of child care facilities in Contra Costa County;
- To understand existing strategies in place to develop child care facilities; to seek perceptions of where responsibilities lie; and
- To identify real properties with potential to house early learning programs.

This survey was focused on opinions from various sectors in the County to solicit a wide range of ideas on how to address the existing early learning facilities shortage. By design, the stakeholders were not limited to a discrete set of respondents. Both targeted and open

engagement strategies were used. School Superintendents and facilities personnel were invited by direct email invitation by County Superintendent of Schools, Karen Sakata. Staff from county and city planning departments were invited to respond and distribute the survey through personalized email invitations from members of the Board of Supervisors. Davis Consultant Network developed lists and sent invitations to 16 large employers, 52 faith-based organizations, 76 real estate development firms, and 18 non-profit organizations. The LPC and First 5 Contra Costa County were offered the web link to distribute through their communication networks. Seventy-five (75) survey responses were collected between January 30, 2018 and June 6, 2018. This report summarizes responses received, which have not been independently verified.

Figure 1: Survey respondents self-identified by their sector related to child care facilities, land use or real estate in Contra Costa County.

Sector	Individual Responses
Real Estate Developer	1
Local Business	1
Community College District	1
County of Contra Costa	1
Non-Profit	4
Interested Individual	10
Local School Districts	13
City Planners	14
Faith-Based Organizations	29
Total	74

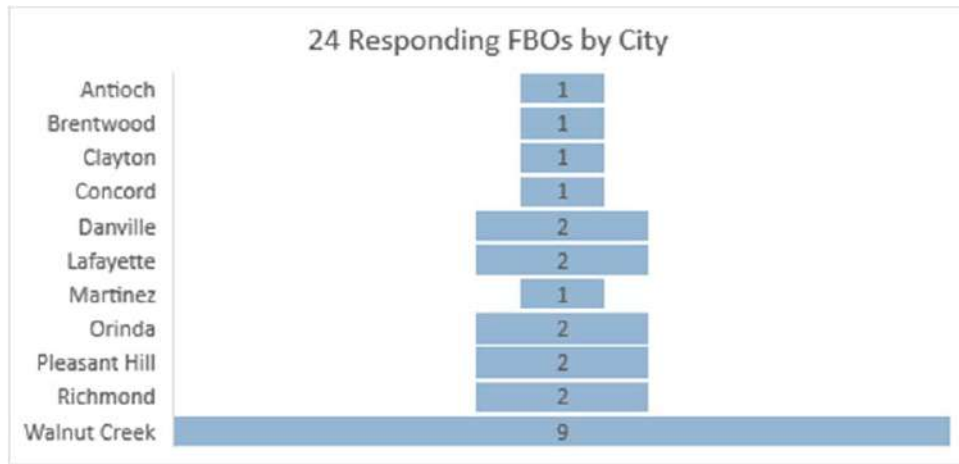
Stakeholder Survey Findings by Sector

Faith-Based Organizations

Sample

The research team developed a list of faith-based organizations (FBOs) from an internet search of members of the Contra Costa Interfaith Coalition and the Multi-Faith Action Coalition. Twenty-eight individual responses were received from 24 different entities.

Figure 2: Number of responding faith-based organizations by city. (n=24 FBOs)

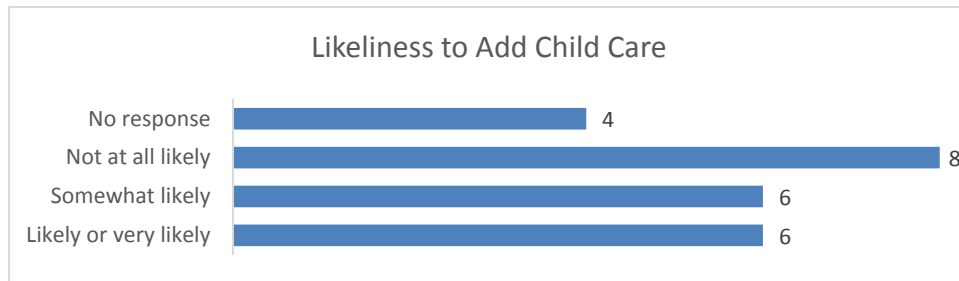


We asked if each respondent if their congregation owned their facility. With ownership comes greater control over facility usage. Eighty-three percent (n=20) of reported FBOs own their facilities.

One-third of the reporting congregations (n = 8) currently provide space for licensed weekday child care. Half of the respondents (n = 14 respondents representing 12 congregations) thought there was some likelihood (“very likely”, “likely” and “somewhat likely”) that their congregation would consider incorporating new or additional space for child care. One was currently looking for a suitable child care operator and two others indicated a commitment to serve the community and be responsive to emerging needs.

When asked if they would rent space to an independent child care operator, the number likely to offer space dropped to 37% (n = 11 respondents representing 9 congregations). Reasons offered for this included: avoidance of competition for existing on-site child care; competing uses, such as offering space for a school for special needs children; and limited resources to develop license-qualified spaces.

Figure 3: Responses by FBOs to question “In your opinion, how likely is it that your congregation would consider incorporating new or additional space for child care either within its current facilities or on its grounds within the next ten years?” (n=24 congregations)



City Planners

Sample

Contra Costa Supervisors sent email requests to city managers and city planning departments inviting them to respond to the survey. The research team sent a third reminder to city planning offices of cities that had not yet responded. Fourteen individual responses were collected from the following 12 of the 19 Contra Costa County municipalities. These were: Brentwood; Clayton; Concord; El Cerrito; Hercules; Lafayette; Oakley; Orinda; Pinole; Pittsburg; Pleasant Hill; and Walnut Creek. Additionally, staff from Danville answered some survey questions in a telephone interview when the research team was verifying email addresses for the survey invitation.

Addressing Child Care in Planning

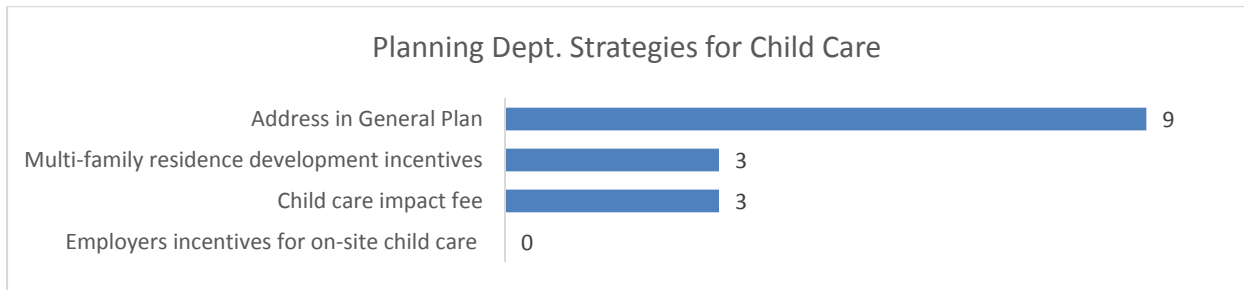
Several questions were asked about existing planning strategies to provide for the development of child care facilities. Three-quarters of the responding cities (n = 10) reported addressing child care in their general plan. The cities of Clayton¹⁵, Pinole¹⁶, and Walnut Creek¹⁷ offer incentives to developers of multi-family residences to include child care. Clayton, Concord, and Danville charge child care development fees.

¹⁵ The City of Clayton offers either a density bonus or other concession or incentive to residential projects which include child care facilities. See: https://library.municode.com/ca/clayton/codes/municipal_code?nodeId=TIT17ZO_CH17.90AFHODEBORE_17.90.060CHCAFA

¹⁶ New multi-family residential developments within Pinole that include on-site day care as a community benefit may be eligible for residential density or intensity bonuses.

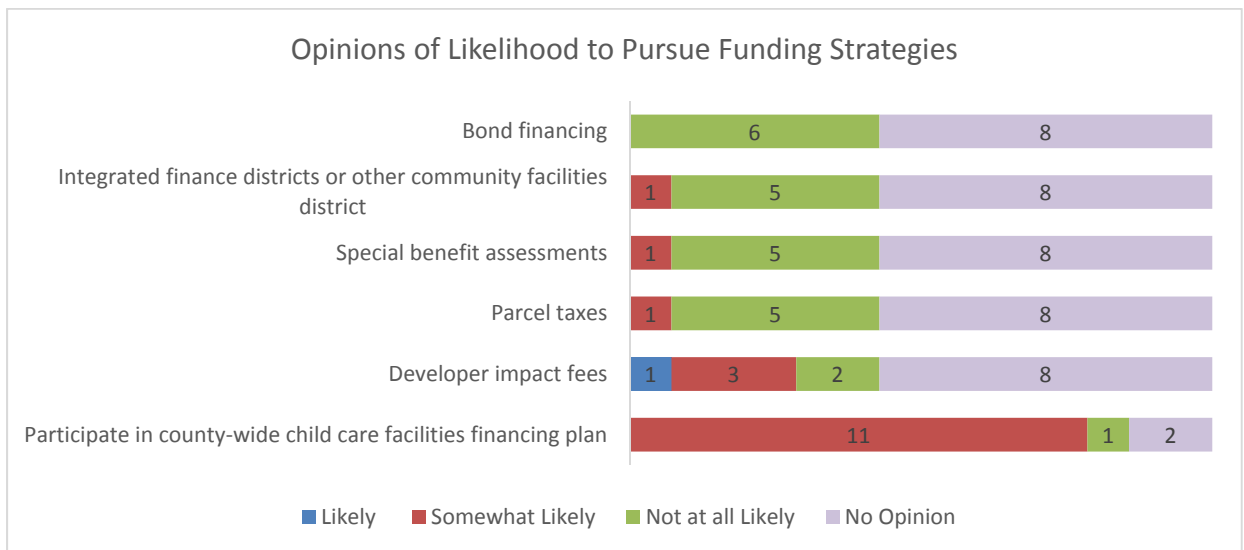
¹⁷ Walnut Creek offers a density bonus when planning department is scoring proposed developments that include child care. See: [Walnut Creek Muni Code section 10-2.3.1007 Density Bonus for Child Care Facilities](http://www.codepublishing.com/CA/WalnutCreek/#!walnutcreek10/WalnutCreek1002C.html#10). See: <http://www.codepublishing.com/CA/WalnutCreek/#!walnutcreek10/WalnutCreek1002C.html#10>

Figure 4: Summary chart of cities reported use of various strategies to encourage child care facilities. (n=12)



The responding city staff were asked their opinions of the likelihood that their jurisdiction would consider various strategies to ensure sufficiency of child care facilities. Modest optimism was offered by 79% of respondents who thought their jurisdiction would be “somewhat likely” to participate in some type of county-wide facilities child care funding plan. Planners considered developer impact fees the most likely funding strategy to be considered, but support for that was still quite modest. No city staff were aware of any major child care planning or policy efforts in their city. Concord staff noted that they have reduced application fees and requirements for small and large licensed family child care programs in their city.

Figure 5: Summary chart of responses to a series of questions asking respondents opinion of the likelihood of their jurisdiction considering specific funding strategies. (n=14)



Potential Sites for Child Care Facilities

Several questions were asked about potential sites for new child care facilities.

- Brentwood, Concord, Oakley, and Pleasant Hill identified several planned or in-construction projects that will include child care.
- Clayton, Concord, Oakley, and Pittsburg identified several currently-proposed development projects that could possibly accommodate child care in the facilities or on their grounds.
- Pleasant Hill and Oakley identified city-owned sites with potential for constructing child care facilities.
- Clayton, Oakley, and Pinole identified sites within their jurisdictions with potential to accommodate child care facilities.

Public School Districts (K-12 & Community College)

Sample

County Superintendent of Schools Karen Sakata distributed three direct invitations to all the district superintendents requesting that a member of their staff respond to the survey. The research team sent an additional reminder to district facilities personnel from districts that had not yet responded to the initial two requests. Responses were received from 12 of the invited 25 school districts (which included primary, secondary, joint, county office, and community college districts). Responding districts/schools included: Acalanes Union High; Byron Union; Canyon; Contra Costa Community College; Contra Costa Mauzy School; John Swett Unified; Liberty Union; Martinez Unified; Moraga; Orinda Union; Pittsburg Unified; and Walnut Creek.

Existing & Potential On-Site Child Care

Districts were asked if they provided on-site child care. See table below. Martinez Unified School District had previously offered a Head Start program which is no longer housed by the district. Bryon Union, the Mauzy School, John Swett Unified and Pittsburg Unified all reported that they have potential rooms, portables or land which might be converted for early education programs.

School District	On-Site Child Care Offered by Child Age				Potential for Expansion
	0-2 years	3-4 years (District Provided)	3-4 years (Privately Provided)	5-12 years	
Acalanes Union High	●	●			
Byron Union		●		●	✓
Canyon				●	
Contra Costa Community College District	●	●			
Contra Costa County Mauzy School			●	●	✓
John Swett Unified			●	●	✓
Liberty Union High			●	●	
Martinez Unified		●	●		
Moraga		●	●		
Orinda Union		●	●		
Pittsburg Unified		●	●		✓
Walnut Creek		●	●		

Real Estate Developers

Sample

Invitations were sent by the research team to 76 real estate development entities active in the county. Only one responded.

Challenges

This developer had previously considered including child care in a project, but it proved too challenging. “Current city and muni fees [municipal fees] have increased substantially in recent years. Hard cost escalation during that same time has also been double-digit growth, year over year. Accommodating child care facilities is economically next to impossible due to these two items.” When asked for suggestions to meet the growing demand for child care, the developer stated: “Designate sites for child care facilities and incentivize developers to develop those sites as child care. Requiring developers to put child care in new multi-family projects is going to result in higher lease rates for tenants. Rising construction costs and city/muni fees have resulted in margins already being below industry standard levels. Requiring day care centers in new multi-family developments will either result in the projects not being developed due to not being economically feasible or increased rental rates for tenants.”

Other Respondents & Comments

Twenty-six other respondents from the non-profit or private sector identified six other potential child care sites.

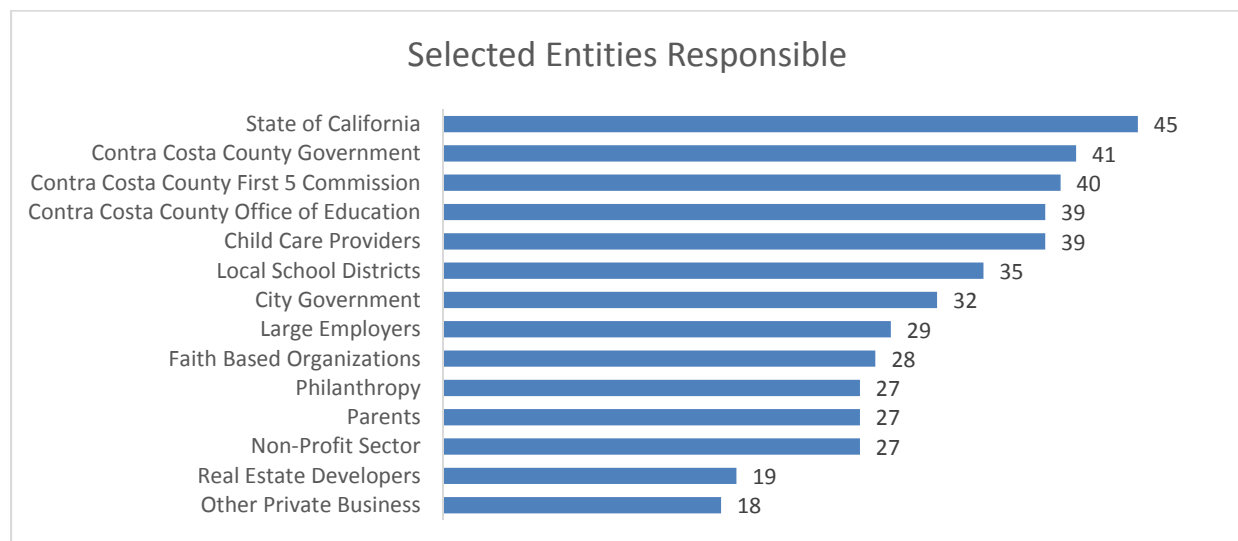
The survey ended with an open-ended question seeking questions and comments. Some notable responses included the following.

1. Can cities offer facilities for child care at discounted rates?
2. Develop a clearinghouse of potential sites that child care providers can consider.
3. Consider expedited licensing for expansion of existing or development of new sites.
4. Offer educational sessions on financing options.
5. Plan to link child care and senior facilities.

Who has the Responsibility to Solve?

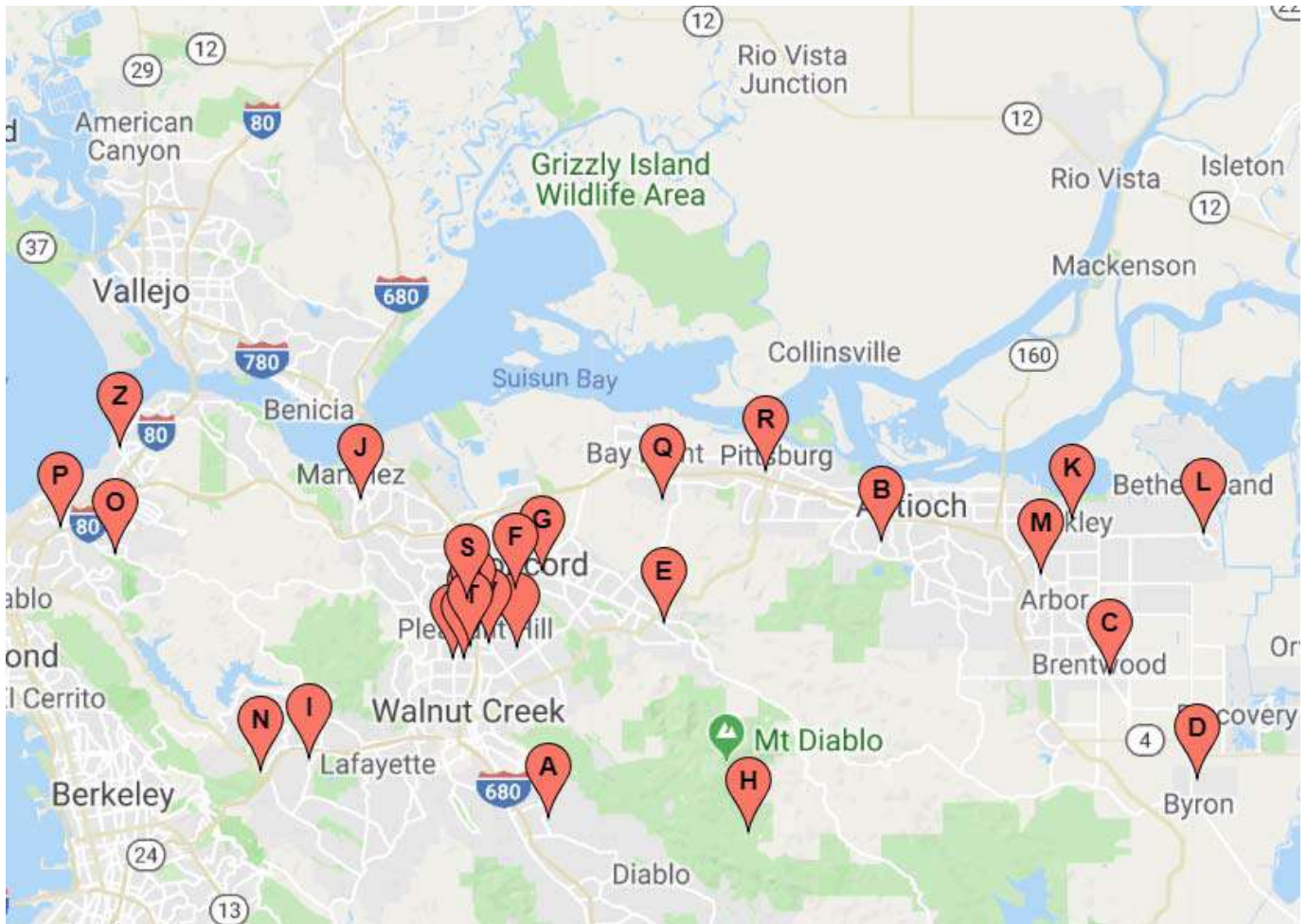
A closing question asked, “Who or what entities do you believe are responsible to ensure a continued supply of quality early learning and child care in Contra Costa County?” The public sector at all levels of government was most frequently identified as responsible: the state, county, First 5, County Office of Education, local school districts and city government. It was commonly recognized that any solution would require collaboration across levels of government and between the public and private sectors. See chart below.

Figure 6: Response to question “Who or what entities do you believe are responsible to ensure a continued supply of quality early learning and child care in Contra Costa County?” (n=72)



Identified Potential New Child Care Locations

Several questions asked if the respondent knew of any potential sites for child care. The map and chart below summarize suggested sites.



City	Map	Location	Type	Planned	Possibility For	
					New	Expansion
Alamo	A	Contra Costa County Office of Education, Mauzy School	School District			●
	B	St. Ignatius of Antioch Catholic Church	FBO			●
Brentwood	C	Kiddie Academy, 8680 Brentwood Boulevard	Private	●		
Byron	D	Byron Union, Discovery Rooms	School District			●
Clayton	E	St. John's Episcopal Church	FBO		●	●
Concord	F	Concord Child Care Center	Child Care			●
	G	Bright Stars Daycare, Large Family Daycare	Child Care			●
of Contra Costa		County owns parcels of land throughout the county	County		●	
Lafayette	I	Lafayette-Orinda Presbyterian Church	FBO			●
Martinez	J	Martinez Early Childhood Center	FBO			●
Oakley	K	The SE corner of Laurel Rd. and Main St. is a small parcel that	Private		●	
	L	Shea Homes has a small facility at the Summer Lakes Subdivis	Private		●	
	M	First Academy		●		
Orinda	N	First Church of Christ, Scientist	FBO			●
Pinole	O	Elementary & Middle School campuses owned by the West Co	School District			●
	P	Appian 80 Shopping Center, Tara Hills Drive, West of Appian V	Private		●	
Pittsburg	Q	Pittsburg Unified	School District			●
	R	Civic Center Offices, NW Corner of Hwy 4 & Railroad Ave	City			●
Pleasant Hill	S	St. Andrews Presbyterian Church	FBO		●	●
	T	250 Cleaveland Rd. - 0.25 acres vacant land	Private		●	
	U	Woodsworth Lane - 0.20 acres vacant land (no address)	Private		●	
	V	Hookston Rd. - 0.14 acres vacant land	Private		●	
	W	Faith Lutheran Church, 50 Cleaveland	FBO	●		
	X	Fountainhead Day Care - 1715 Oak Park Blvd	Child Care	●		
	Y	Kidz Kastle - 1925 Oak Park Blvd	Child Care	●		
Rodeo	Z	John Swett Unified, Rodeo Hills Elementary	School District			●
Walnut Creek	AA	Walnut Creek Church of Christ	FBO		●	

Contributors

We would like to thank all those who responded to our survey. Special thanks to the following who granted permission to be acknowledged in this report.

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Debbie Gold	Temple Beth Hillel
Ernie Hess	St Andrew's Presbyterian Church
Debbie Hill	City of Brentwood
Dave Humphrey	Temple Isaiah
Rabbi Dean Kertesz	Temple Beth Hillel
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Charles Miller	St. John Vianney Catholic Church
Marie Morgan	Unity of Walnut Creek
Natalie Oleas	Family Justice Center
Mike Pawlowski	Martinez Unified School District
Jaime Polson	Lafayette-Orinda Presbyterian Church
Heather Posner	Temple Isaiah
Kristin Powell	Unity of Walnut Creek
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Winston Rhodes	City of Pinole
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Hector Rojas	City of Pittsburg
Rev. Eric Sherlock	Danville Congregational Church
Laura Simpson	City of Concord
The Rev. Dr. Deborah White	Grace Episcopal Church
Colleen Wilson	St. John's Episcopal Church
	City of Hercules
	City of Oakley
	City of Walnut Creek
	Concord Childcare Center
	Liberty Union School District
	St. John Vianney Catholic Church

Additional City Data

City staff from the following cities offered some sources for additional information regarding land-use projects proposed or in development, as well as how to access their general plans.

City	List of Projects in the Pipeline	General Plan References of Child Care
Brentwood	www.brentwoodca.gov/gov/cd/planning/current.asp	The general commercial designation allows for concentrations of a variety of mixed use and service type businesses, including day care centers. www.brentwoodca.gov/civicax/filebank/blobdload.aspx?BlobID=26394
Clayton	Email Community Development Director, Mindy Gentry at mgentry@ci.clayton.ca.us to request.	
Concord	Email Planning Manager Laura Simpson at Laura.Simpson@cityofconcord.org	
El Cerrito		www.el-cerrito.org/718/General-Plan
Lafayette	www.lovelafayette.org/?splash=http%3a%2f%2flafayette.icitywork.com%2f&__isexternal=true	
Oakley	www.oakleyinfo.com	Encouraged in all residential zones and specifically mentioned in the Growth Management Element. www.ci.oakley.ca.us/wp-content/uploads/2015/07/2016-Update-Complete_2-2-16.pdf
Pittsburg	https://app.smartsheet.com/b/publish?EQBCT=0af19f7941c94a9f8407285ae7e06827	
Pleasant Hill	Interactive Planning Projects Map on City Website	www.ci.pleasant-hill.ca.us/DocumentCenter/Home/View/314
Walnut Creek	www.walnut-creek.org/home/showdocument?id=4970	WC General Plan 2025 - Chapter 4, page 4-3: "Single-family residential units, churches, schools, parks, public/semi-public buildings, accessory uses, and day-care facilities are permitted in all residential land use districts provided they meet the requirements of the underlying zone and applicable general plan policies."

APPENDIX A:

NEEDS ASSESSMENT TABLES BY CITY AND COUNTY

Contra Costa County Child Care Needs Assessment 2017

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Source: Brion Economics, Inc.

Table 1
Summary of Demographics by City and Age: 2017 to 2027
Contra Costa County Child Care Needs Assessment 2017

City/Area	Antioch		Brentwood		Clayton		Concord		Danville	
	2017	2027	2017	2027	2017	2027	2017	2027	2017	2027
Population	108,720	114,320	54,380	56,560	11,300	11,600	133,320	148,000	45,580	46,880
Percent of Total County	9.7%	9.6%	4.9%	4.7%	1.0%	1.0%	11.9%	12.4%	4.1%	3.9%
Net Change '17 to '27		5,600		2,180		300		14,680		1,300
Percent Change '17 to '27		5%		4%		3%		11%		3%
Population by Age										
0-35 Months	4,534	4,767	2,105	2,190	262	269	5,436	6,034	1,170	1,203
3-4 years	3,602	3,788	1,929	2,006	261	268	4,077	4,526	1,193	1,227
5-9 years	7,798	8,199	4,569	4,752	743	763	7,720	8,570	3,345	3,440
10-12 years	<u>5,245</u>	<u>5,515</u>	<u>3,103</u>	<u>3,228</u>	<u>540</u>	<u>555</u>	<u>4,767</u>	<u>5,292</u>	<u>2,330</u>	<u>2,396</u>
Total Children 0-12 years	21,179	22,269	11,706	12,175	1,806	1,854	22,000	24,422	8,037	8,267
Percent of Total County	10.8%	10.7%	6.0%	5.8%	0.9%	0.9%	11.3%	11.7%	4.1%	4.0%
Net Change '17 to '27		1,091		469		48		2,422		229
Percent of Population by Age										
0-35 Months	4.2%	4.2%	3.9%	3.9%	2.3%	2.3%	4.1%	4.1%	2.6%	2.6%
3-4 years	3.3%	3.3%	3.5%	3.5%	2.3%	2.3%	3.1%	3.1%	2.6%	2.6%
5-9 years	7.2%	7.2%	8.4%	8.4%	6.6%	6.6%	5.8%	5.8%	7.3%	7.3%
10-12 years	<u>4.8%</u>	<u>4.8%</u>	<u>5.7%</u>	<u>5.7%</u>	<u>4.8%</u>	<u>4.8%</u>	<u>3.6%</u>	<u>3.6%</u>	<u>5.1%</u>	<u>5.1%</u>
Total Children 0-12 years	19.5%	19.5%	21.5%	21.5%	16.0%	16.0%	16.5%	16.5%	17.6%	17.6%

Note county total does not equal sum of cities/areas due to rounding.

Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Sources: ABAG Projections '13; Brion Economics, Inc.

Continued

Table 1
Summary of Demographics by City and Age: 2017 to 2027
Contra Costa County Child Care Needs Assessment 2017

Continued

City/Area	El Cerrito		Hercules		Lafayette		Martinez		Moraga	
	2017	2027	2017	2027	2017	2027	2017	2027	2017	2027
Population	30,760	31,920	28,420	32,380	26,420	27,480	44,380	45,760	16,860	17,600
Percent of Total County	2.7%	2.7%	2.5%	2.7%	2.4%	2.3%	4.0%	3.8%	1.5%	1.5%
Net Change '17 to '27		1,160		3,960		1,060		1,380		740
Percent Change '17 to '27		4%		14%		4%		3%		4%
Population by Age										
0-35 Months	1,036	1,075	976	1,112	704	733	1,334	1,376	285	298
3-4 years	792	822	745	849	690	717	1,010	1,041	348	363
5-9 years	1,516	1,573	1,653	1,883	1,806	1,878	2,284	2,355	947	988
10-12 years	<u>750</u>	<u>778</u>	<u>1,048</u>	<u>1,194</u>	<u>1,191</u>	<u>1,239</u>	<u>1,442</u>	<u>1,487</u>	<u>663</u>	<u>692</u>
Total Children 0-12 years	4,094	4,248	4,421	5,037	4,391	4,567	6,070	6,259	2,243	2,342
Percent of Total County	2.1%	2.0%	2.3%	2.4%	2.2%	2.2%	3.1%	3.0%	1.1%	1.1%
Net Change '17 to '27		154		616		176		189		98
Percent of Population by Age										
0-35 Months	3.4%	3.4%	3.4%	3.4%	2.7%	2.7%	3.0%	3.0%	1.7%	1.7%
3-4 years	2.6%	2.6%	2.6%	2.6%	2.6%	2.6%	2.3%	2.3%	2.1%	2.1%
5-9 years	4.9%	4.9%	5.8%	5.8%	6.8%	6.8%	5.1%	5.1%	5.6%	5.6%
10-12 years	<u>2.4%</u>	<u>2.4%</u>	<u>3.7%</u>	<u>3.7%</u>	<u>4.5%</u>	<u>4.5%</u>	<u>3.2%</u>	<u>3.2%</u>	<u>3.9%</u>	<u>3.9%</u>
Total Children 0-12 years	13.3%	13.3%	15.6%	15.6%	16.6%	16.6%	13.7%	13.7%	13.3%	13.3%

Note county total does not equal sum of cities/areas due to rounding.

Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Sources: ABAG Projections '13; Brion Economics, Inc.

Continued

Table 1
Summary of Demographics by City and Age: 2017 to 2027
Contra Costa County Child Care Needs Assessment 2017

Continued

City/Area	Oakley		Orinda		Pinole		Pittsburg		Pleasant Hill	
	2017	2027	2017	2027	2017	2027	2017	2027	2017	2027
Population	41,780	46,940	18,320	18,960	31,040	32,360	93,000	101,580	41,440	42,800
Percent of Total County	3.7%	3.9%	1.6%	1.6%	2.8%	2.7%	8.3%	8.5%	3.7%	3.6%
Net Change '17 to '27		5,160		640		1,320		8,580		1,360
Percent Change '17 to '27		12%		3%		4%		9%		3%
Population by Age										
0-35 Months	1,876	2,108	439	455	955	996	4,265	4,658	1,313	1,356
3-4 years	1,444	1,623	458	474	700	729	3,421	3,737	1,069	1,104
5-9 years	3,251	3,653	1,321	1,367	1,501	1,565	6,776	7,401	2,150	2,220
10-12 years	<u>2,253</u>	<u>2,532</u>	<u>909</u>	<u>940</u>	<u>1,092</u>	<u>1,138</u>	<u>4,088</u>	<u>4,465</u>	<u>1,289</u>	<u>1,331</u>
Total Children 0-12 years	8,825	9,915	3,127	3,236	4,248	4,429	18,550	20,262	5,820	6,011
Percent of Total County	4.5%	4.8%	1.6%	1.6%	2.2%	2.1%	9.5%	9.7%	3.0%	2.9%
Net Change '17 to '27		1,090		109		181		1,711		191
Percent of Population by Age										
0-35 Months	4.5%	4.5%	2.4%	2.4%	3.1%	3.1%	4.6%	4.6%	3.2%	3.2%
3-4 years	3.5%	3.5%	2.5%	2.5%	2.3%	2.3%	3.7%	3.7%	2.6%	2.6%
5-9 years	7.8%	7.8%	7.2%	7.2%	4.8%	4.8%	7.3%	7.3%	5.2%	5.2%
10-12 years	<u>5.4%</u>	<u>5.4%</u>	<u>5.0%</u>	<u>5.0%</u>	<u>3.5%</u>	<u>3.5%</u>	<u>4.4%</u>	<u>4.4%</u>	<u>3.1%</u>	<u>3.1%</u>
Total Children 0-12 years	21.1%	21.1%	17.1%	17.1%	13.7%	13.7%	19.9%	19.9%	14.0%	14.0%

Note county total does not equal sum of cities/areas due to rounding.

Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Sources: ABAG Projections '13; Brion Economics, Inc.

Continued

Table 1
Summary of Demographics by City and Age: 2017 to 2027
Contra Costa County Child Care Needs Assessment 2017

Continued

City/Area	Richmond		San Pablo		San Ramon		Walnut Creek		Alamo-Blackhawk (3)	
	2017	2027	2017	2027	2017	2027	2017	2027	2017	2027
Population	132,100	142,360	35,440	37,600	77,500	81,660	87,240	92,680	25,600	26,020
Percent of Total County	11.8%	11.9%	3.2%	3.2%	6.9%	6.8%	7.8%	7.8%	2.3%	2.2%
Net Change '17 to '27		10,260		2,160		4,160		5,440		420
Percent Change '17 to '27		8%		6%		5%		6%		2%
Population by Age										
0-35 Months	5,857	6,312	1,736	1,841	3,393	3,575	2,065	2,194	517	525
3-4 years	4,390	4,731	1,339	1,421	3,108	3,275	1,712	1,818	547	555
5-9 years	8,547	9,211	2,678	2,841	6,784	7,148	3,792	4,028	1,645	1,672
10-12 years	<u>5,298</u>	<u>5,709</u>	<u>1,581</u>	<u>1,677</u>	<u>3,886</u>	<u>4,095</u>	<u>2,474</u>	<u>2,628</u>	<u>1,364</u>	<u>1,387</u>
Total Children 0-12 years	24,092	25,964	7,334	7,781	17,172	18,094	10,042	10,668	4,073	4,139
Percent of Total County	12.3%	12.5%	3.8%	3.7%	8.8%	8.7%	5.1%	5.1%	2.1%	2.0%
Net Change '17 to '27		1,871		447		922		626		67
Percent of Population by Age										
0-35 Months	4.4%	4.4%	4.9%	4.9%	4.4%	4.4%	2.4%	2.4%	2.0%	2.0%
3-4 years	3.3%	3.3%	3.8%	3.8%	4.0%	4.0%	2.0%	2.0%	2.1%	2.1%
5-9 years	6.5%	6.5%	7.6%	7.6%	8.8%	8.8%	4.3%	4.3%	6.4%	6.4%
10-12 years	<u>4.0%</u>	<u>4.0%</u>	<u>4.5%</u>	<u>4.5%</u>	<u>5.0%</u>	<u>5.0%</u>	<u>2.8%</u>	<u>2.8%</u>	<u>5.3%</u>	<u>5.3%</u>
Total Children 0-12 years	18.2%	18.2%	20.7%	20.7%	22.2%	22.2%	11.5%	11.5%	15.9%	15.9%

Note county total does not equal sum of cities/areas due to rounding.

Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Sources: ABAG Projections '13; Brion Economics, Inc.

Continued

Table 1
Summary of Demographics by City and Age: 2017 to 2027
Contra Costa County Child Care Needs Assessment 2017

Continued

City/Area	Rodeo-Crockett (4)		Rural East C.C. County (5)		Remainder		Total Contra Costa County	
	2017	2027	2017	2027	2017	2027	2017	2027
Population	12,160	12,480	20,320	20,880	4,380	4,500	1,120,460	1,193,320
Percent of Total County	1.1%	1.0%	1.8%	1.7%	0.4%	0.4%	100.0%	100.0%
Net Change '17 to '27		320		560		120		72,860
Percent Change '17 to '27		3%		3%		3%		7%
Population by Age								
0-35 Months	386	396	692	711	139	143	41,476	0
3-4 years	321	330	586	602	116	119	33,857	36,125
5-9 years	681	699	1,459	1,499	245	252	73,209	77,958
10-12 years	<u>462</u>	<u>474</u>	<u>1,034</u>	<u>1,062</u>	<u>166</u>	<u>171</u>	<u>46,977</u>	<u>49,987</u>
Total Children 0-12 years	1,850	1,899	3,770	3,874	666	685	195,517	208,397
Percent of Total County	0.9%	0.9%	1.9%	1.9%	0.3%	0.3%	100.0%	100.0%
Net Change '17 to '27		49		104		18		12,880
Percent of Population by Age								
0-35 Months	3.2%	3.2%	3.4%	3.4%	3.2%	3.2%	3.7%	3.7%
3-4 years	2.6%	2.6%	2.9%	2.9%	2.6%	2.6%	3.0%	3.0%
5-9 years	5.6%	5.6%	7.2%	7.2%	5.6%	5.6%	6.5%	6.5%
10-12 years	<u>3.8%</u>	<u>3.8%</u>	<u>5.1%</u>	<u>5.1%</u>	<u>3.8%</u>	<u>3.8%</u>	<u>4.2%</u>	<u>4.2%</u>
Total Children 0-12 years	15.2%	15.2%	18.6%	18.6%	15.2%	15.2%	17.4%	17.4%

Note county total does not equal sum of cities/areas due to rounding.

Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Sources: ABAG Projections '13; Brion Economics, Inc.

Table 2
Existing Child Care Demand and Supply in 2017
for City of Antioch
Contra Costa County Child Care Needs Assessment 2017

ANTIOCH-EXISTING		No. of Providers	Child Care Demand as of 2017				
			Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND							
Estimated Total Children	(1)		4,534	3,602	8,136	13,043	21,179
Avg. Labor Force Participation Rates	(2)		66%	66%	66%	69%	68%
Children With Working Parents			3,010	2,392	5,402	9,062	14,464
% Children Needing Licensed Care	(3)		50%	100%	72%	50%	58%
Children Needing Licensed Care			1,505	2,392	3,897	4,531	8,428
Total Demand for Child Care Spaces			1,505	2,392	3,897	4,531	8,428
% Distribution of Total Demand for Spaces by Age Group			18%	28%	46%	54%	100%
% of Total Children Needing Licensed Care			33%	66%	48%	35%	40%
EXISTING SUPPLY							
Family Child Care Homes Supply	(4)						
Licensed for 8	(5)	71	142	284	426	142	568
Licensed for 14		39	117	234	351	195	546
Available Child Care Center Spaces		16	95	993	1,088	182	1,270
License Exempt		7	-	24	24	600	624
Total Number of Providers		133					
Current Child Care Spaces			354	1,535	1,889	1,119	3,008
Percent Distribution			12%	51%	63%	37%	100%
EXISTING SURPLUS/(SHORTAGE)			(1,151)	(857)	(2,008)	(3,412)	(5,420)
Percentage of Demand Met by Existing Facilities/Spaces			24%	64%	48%	25%	36%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 3
Estimated Future Child Care Demand in 2027
for City of Antioch
Contra Costa County Child Care Needs Assessment 2017

ANTIOCH-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(1,151)	(857)	(2,008)	(3,412)	(5,420)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	4,767	3,788	8,555	13,715	22,269
Labor Force Participation Rates	66%	66%	66%	69%	68%
Children with Working Parents	3,165	2,515	5,680	9,529	15,209
Percent of Children Needing Licensed Care	50%	100%	72%	50%	58%
Total Demand at 2027	1,583	2,515	4,098	4,764	8,862
Current Child Care Supply at 2017	354	1,535	1,889	1,119	3,008
Surplus/(Shortage) at 2027	(1,229)	(980)	(2,209)	(3,645)	(5,854)
Percentage of Demand Met by Existing Spaces	22%	61%	46%	23%	34%
Total Net New Demand - 2017 to 2027	(1)	78	201	233	434

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 4
Existing Child Care Demand and Supply in 2017
for City of Brentwood
Contra Costa County Child Care Needs Assessment 2017

BRENTWOOD-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	2,105	1,929	4,034	7,672	11,706
Avg. Labor Force Participation Rates	(2)	65%	65%	65%	68%	67%
Children With Working Parents		1,374	1,258	2,632	5,237	7,869
% Children Needing Licensed Care	(3)	50%	100%	74%	50%	58%
Children Needing Licensed Care		687	1,258	1,945	2,618	4,564
Total Demand for Child Care Spaces		687	1,258	1,945	2,618	4,564
% Distribution of Total Demand for Spaces by Age Group		15%	28%	43%	57%	100%
% of Total Children Needing Licensed Care		33%	65%	48%	34%	39%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	38	76	228	76	304
Licensed for 14		17	51	153	85	238
Available Child Care Center Spaces		27	113	1,042	545	1,587
License Exempt		1	-	-	100	100
Total Number of Providers		83				
Current Child Care Spaces		240	1,183	1,423	806	2,229
Percent Distribution		11%	53%	64%	36%	100%
EXISTING SURPLUS/(SHORTAGE)		(447)	(75)	(522)	(1,812)	(2,335)
Percentage of Demand Met by Existing Facilities/Spaces		35%	94%	73%	31%	49%

- (1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.
- (2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.
- (3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.
- (4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.
- (5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCs, 2 spaces are infant, 4 are preschool, and 2 are school. For large FCCs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.
- Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 5
Estimated Future Child Care Demand in 2027
for City of Brentwood
Contra Costa County Child Care Needs Assessment 2017

BRENTWOOD-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(447)	(75)	(522)	(1,812)	(2,335)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	2,190	2,006	4,195	7,980	12,175
Labor Force Participation Rates	65%	65%	65%	68%	67%
Children with Working Parents	1,429	1,309	2,738	5,447	8,185
Percent of Children Needing Licensed Care	50%	100%	74%	50%	58%
Total Demand at 2027	714	1,309	2,023	2,723	4,747
Current Child Care Supply at 2017	240	1,183	1,423	806	2,229
Surplus/(Shortage) at 2027	(474)	(126)	(600)	(1,917)	(2,518)
Percentage of Demand Met by Existing Spaces	34%	90%	70%	30%	47%
Total Net New Demand - 2017 to 2027	28	50	78	105	183

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County. A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 6
Existing Child Care Demand and Supply in 2017
for City of Clayton
Contra Costa County Child Care Needs Assessment 2017

CLAYTON-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	262	261	523	1,283	1,806
Avg. Labor Force Participation Rates	(2)	79%	79%	79%	65%	69%
Children With Working Parents		208	207	414	835	1,249
% Children Needing Licensed Care	(3)	50%	100%	75%	50%	58%
Children Needing Licensed Care		104	207	311	417	728
Total Demand for Child Care Spaces		104	207	311	417	728
% Distribution of Total Demand for Spaces by Age Group		14%	28%	43%	57%	100%
% of Total Children Needing Licensed Care		40%	79%	59%	33%	40%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	1	2	4	2	8
Licensed for 14		3	9	27	15	42
Available Child Care Center Spaces		3	16	224	203	427
License Exempt		0	-	-	-	-
Total Number of Providers		7				
Current Child Care Spaces		27	230	257	220	477
Percent Distribution		6%	48%	54%	46%	100%
EXISTING SURPLUS/(SHORTAGE)		(77)	23	(54)	(197)	(251)
Percentage of Demand Met by Existing Facilities/Spaces		26%	111%	83%	53%	66%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 7
Estimated Future Child Care Demand in 2027
for City of Clayton
Contra Costa County Child Care Needs Assessment 2017

CLAYTON-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(77)	23	(54)	(197)	(251)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	269	268	537	1,317	1,854
Labor Force Participation Rates	79%	79%	79%	65%	69%
Children with Working Parents	213	212	425	857	1,283
Percent of Children Needing Licensed Care	50%	100%	75%	50%	58%
Total Demand at 2027	107	212	319	429	747
Current Child Care Supply at 2017	27	230	257	220	477
Surplus/(Shortage) at 2027	(80)	18	(62)	(209)	(270)
Percentage of Demand Met by Existing Spaces	25%	108%	81%	51%	64%
Total Net New Demand - 2017 to 2027	(1)	3	8	11	19

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County. A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 8
Existing Child Care Demand and Supply in 2017
for City of Concord
Contra Costa County Child Care Needs Assessment 2017

CONCORD-EXISTING		No. of Providers	Child Care Demand as of 2017				
			Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND							
Estimated Total Children	(1)		5,436	4,077	9,513	12,487	22,000
Avg. Labor Force Participation Rates	(2)		61%	61%	61%	67%	64%
Children With Working Parents			3,315	2,486	5,800	8,371	14,171
% Children Needing Licensed Care	(3)		50%	100%	71%	50%	59%
Children Needing Licensed Care			1,657	2,486	4,143	4,185	8,329
Total Demand for Child Care Spaces			1,657	2,486	4,143	4,185	8,329
% Distribution of Total Demand for Spaces by Age Group			20%	30%	50%	50%	100%
% of Total Children Needing Licensed Care			30%	61%	44%	34%	38%
EXISTING SUPPLY			(4)				
Family Child Care Homes Supply	(5)						
Licensed for 8		80	160	320	480	160	640
Licensed for 14		34	103	206	309	165	474
Available Child Care Center Spaces		43	167	1,912	2,079	1,126	3,205
License Exempt		13	-	304	304	1,062	1,366
Total Number of Providers		170					
Current Child Care Spaces			430	2,742	3,172	2,513	5,685
Percent Distribution			8%	48%	56%	44%	100%
EXISTING SURPLUS/(SHORTAGE)			(1,227)	256	(971)	(1,672)	(2,644)
Percentage of Demand Met by Existing Facilities/Spaces			26%	110%	77%	60%	68%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 9
Estimated Future Child Care Demand in 2027
for City of Concord
Contra Costa County Child Care Needs Assessment 2017

CONCORD-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(1,227)	256	(971)	(1,672)	(2,644)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	6,034	4,526	10,560	13,862	24,422
Labor Force Participation Rates	61%	61%	61%	67%	64%
Children with Working Parents	3,680	2,760	6,439	9,293	15,732
Percent of Children Needing Licensed Care	50%	100%	71%	50%	59%
Total Demand at 2027	1,840	2,760	4,599	4,646	9,246
Current Child Care Supply at 2017	430	2,742	3,172	2,513	5,685
Surplus/(Shortage) at 2027	(1,410)	(18)	(1,427)	(2,133)	(3,561)
Percentage of Demand Met by Existing Spaces	23%	99%	69%	54%	61%
Total Net New Demand - 2017 to 2027	(1)	182	274	456	5,102

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 10
Existing Child Care Demand and Supply in 2017
for Town of Danville
Contra Costa County Child Care Needs Assessment 2017

DANVILLE-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	1,170	1,193	2,363	5,675	8,037
Avg. Labor Force Participation Rates	(2)	59%	59%	59%	58%	59%
Children With Working Parents		696	710	1,406	3,315	4,720
% Children Needing Licensed Care	(3)	50%	100%	75%	50%	58%
Children Needing Licensed Care		348	710	1,058	1,657	2,715
Total Demand for Child Care Spaces		348	710	1,058	1,657	2,715
% Distribution of Total Demand for Spaces by Age Group		13%	26%	39%	61%	100%
% of Total Children Needing Licensed Care		30%	59%	45%	29%	34%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	11	22	66	22	88
Licensed for 14		3	9	27	15	42
Available Child Care Center Spaces		21	36	710	809	1,519
License Exempt		0	-	-	-	-
Total Number of Providers		35				
Current Child Care Spaces		67	736	803	846	1,649
Percent Distribution		4%	45%	49%	51%	100%
EXISTING SURPLUS/(SHORTAGE)		(281)	26	(255)	(811)	(1,066)
Percentage of Demand Met by Existing Facilities/Spaces		19%	104%	76%	51%	61%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 11
Estimated Future Child Care Demand in 2027
for Town of Danville
Contra Costa County Child Care Needs Assessment 2017

DANVILLE-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(281)	26	(255)	(811)	(1,066)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	1,203	1,227	2,430	5,836	8,267
Labor Force Participation Rates	59%	59%	59%	58%	59%
Children with Working Parents	716	730	1,446	3,409	4,855
Percent of Children Needing Licensed Care	50%	100%	75%	50%	58%
Total Demand at 2027	358	730	1,088	1,705	2,793
Current Child Care Supply at 2017	67	736	803	846	1,649
Surplus/(Shortage) at 2027	(291)	6	(285)	(859)	(1,144)
Percentage of Demand Met by Existing Spaces	19%	101%	74%	50%	59%
Total Net New Demand - 2017 to 2027	(1)	10	20	1,705	1,735

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County. A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 12
Existing Child Care Demand and Supply in 2017
for City of El Cerrito
Contra Costa County Child Care Needs Assessment 2017

EL CERRITO-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	1,036	792	1,828	2,266	4,094
Avg. Labor Force Participation Rates	(2)	64%	64%	64%	74%	69%
Children With Working Parents		659	504	1,163	1,680	2,842
% Children Needing Licensed Care	(3)	50%	100%	72%	50%	59%
Children Needing Licensed Care		329	504	833	840	1,673
Total Demand for Child Care Spaces		329	504	833	840	1,673
% Distribution of Total Demand for Spaces by Age Group		20%	30%	50%	50%	100%
% of Total Children Needing Licensed Care		32%	64%	46%	37%	41%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	10	20	60	20	80
Licensed for 14		23	71	213	105	318
Available Child Care Center Spaces		16	17	685	114	799
License Exempt		<u>1</u>	-	-	100	100
Total Number of Providers		50				
Current Child Care Spaces		108	850	958	339	1,297
Percent Distribution		8%	66%	74%	26%	100%
EXISTING SURPLUS/(SHORTAGE)		(221)	346	125	(501)	(376)
Percentage of Demand Met by Existing Facilities/Spaces		33%	169%	115%	40%	78%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 13
Estimated Future Child Care Demand in 2027
for City of El Cerrito
Contra Costa County Child Care Needs Assessment 2017

EL CERRITO-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(221)	346	125	(501)	(376)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	1,075	822	1,897	2,351	4,248
Labor Force Participation Rates	64%	64%	64%	74%	69%
Children with Working Parents	684	523	1,206	1,743	2,949
Percent of Children Needing Licensed Care	50%	100%	72%	50%	59%
Total Demand at 2027	342	523	865	871	1,736
Current Child Care Supply at 2017	108	850	958	339	1,297
Surplus/(Shortage) at 2027	(234)	327	93	(532)	(439)
Percentage of Demand Met by Existing Spaces	32%	163%	111%	39%	75%
Total Net New Demand - 2017 to 2027	(1)	12	31	871	903

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County. A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 14
Existing Child Care Demand and Supply in 2017
for City of Hercules
Contra Costa County Child Care Needs Assessment 2017

HERCULES-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	976	745	1,721	2,700	4,421
Avg. Labor Force Participation Rates	(2)	78%	78%	78%	76%	77%
Children With Working Parents		764	584	1,348	2,060	3,408
% Children Needing Licensed Care	(3)	50%	100%	72%	50%	59%
Children Needing Licensed Care		382	584	966	1,030	1,996
Total Demand for Child Care Spaces		382	584	966	1,030	1,996
% Distribution of Total Demand for Spaces by Age Group		19%	29%	48%	52%	100%
% of Total Children Needing Licensed Care		39%	78%	56%	38%	45%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	6	12	24	36	48
Licensed for 14		14	43	86	65	194
Available Child Care Center Spaces		4	-	55	288	343
License Exempt		1	-	-	64	64
Total Number of Providers	25					
Current Child Care Spaces		55	165	220	429	649
Percent Distribution		8%	25%	34%	66%	100%
EXISTING SURPLUS/(SHORTAGE)		(327)	(419)	(746)	(601)	(1,347)
Percentage of Demand Met by Existing Facilities/Spaces		14%	28%	23%	42%	33%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 15
Estimated Future Child Care Demand in 2027
for City of Hercules
Contra Costa County Child Care Needs Assessment 2017

HERCULES-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(327)	(419)	(746)	(601)	(1,347)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	1,112	849	1,961	3,077	5,037
Labor Force Participation Rates	78%	78%	78%	76%	77%
Children with Working Parents	871	665	1,536	2,347	3,883
Percent of Children Needing Licensed Care	50%	100%	72%	50%	59%
Total Demand at 2027	435	665	1,101	1,173	2,274
Current Child Care Supply at 2017	55	165	220	429	649
Surplus/(Shortage) at 2027	(380)	(500)	(881)	(744)	(1,625)
Percentage of Demand Met by Existing Spaces	13%	25%	20%	37%	29%
Total Net New Demand - 2017 to 2027 (1)	53	81	135	1,173	1,308

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 16
Existing Child Care Demand and Supply in 2017
for City of Lafayette
Contra Costa County Child Care Needs Assessment 2017

		No. of Providers	Child Care Demand as of 2017				
			Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
LAFAYETTE-EXISTING							
EXISTING DEMAND							
Estimated Total Children	(1)		704	690	1,394	2,997	4,391
Avg. Labor Force Participation Rates	(2)		54%	54%	54%	64%	61%
Children With Working Parents			383	375	758	1,907	2,665
% Children Needing Licensed Care	(3)		50%	100%	75%	50%	57%
Children Needing Licensed Care			191	375	566	953	1,520
Total Demand for Child Care Spaces			191	375	566	953	1,520
% Distribution of Total Demand for Spaces by Age Group			13%	25%	37%	63%	100%
% of Total Children Needing Licensed Care			27%	54%	41%	32%	35%
EXISTING SUPPLY							
Family Child Care Homes Supply	(5)						
Licensed for 8		1	2	4	6	2	8
Licensed for 14		2	6	12	18	10	28
Available Child Care Center Spaces		14	78	652	730	312	1,042
License Exempt		1	6	6	12	-	12
Total Number of Providers		18					
Current Child Care Spaces			92	674	766	324	1,090
Percent Distribution			8%	62%	70%	30%	100%
EXISTING SURPLUS/(SHORTAGE)			(99)	299	200	(629)	(430)
Percentage of Demand Met by Existing Facilities/Spaces			48%	180%	135%	34%	72%

- (1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.
- (2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.
- (3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.
- (4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.
- (5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.
- Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 17
Estimated Future Child Care Demand in 2027
for City of Lafayette
Contra Costa County Child Care Needs Assessment 2017

LAFAYETTE-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(99)	299	200	(629)	(430)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	733	717	1,450	3,117	4,567
Labor Force Participation Rates	54%	54%	54%	64%	61%
Children with Working Parents	398	390	788	1,984	2,772
Percent of Children Needing Licensed Care	50%	100%	75%	50%	57%
Total Demand at 2027	199	390	589	992	1,581
Current Child Care Supply at 2017	92	674	766	324	1,090
Surplus/(Shortage) at 2027	(107)	284	177	(668)	(491)
Percentage of Demand Met by Existing Spaces	46%	173%	130%	33%	69%
Total Net New Demand - 2017 to 2027	(1)	8	15	38	61

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 18
Existing Child Care Demand and Supply in 2017
for City of Martinez
Contra Costa County Child Care Needs Assessment 2017

		No. of Providers	Child Care Demand as of 2017				
			Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
MARTINEZ-EXISTING							
EXISTING DEMAND							
Estimated Total Children	(1)		1,334	1,010	2,344	3,726	6,070
Avg. Labor Force Participation Rates	(2)		66%	66%	66%	71%	69%
Children With Working Parents			887	671	1,558	2,656	4,214
% Children Needing Licensed Care	(3)		50%	100%	72%	50%	58%
Children Needing Licensed Care			443	671	1,114	1,328	2,443
Total Demand for Child Care Spaces			443	671	1,114	1,328	2,443
% Distribution of Total Demand for Spaces by Age Group			18%	27%	46%	54%	100%
% of Total Children Needing Licensed Care			33%	66%	48%	36%	40%
EXISTING SUPPLY		(4)					
Family Child Care Homes Supply	(5)						
Licensed for 8		13	26	52	78	26	104
Licensed for 14		6	18	36	54	30	84
Available Child Care Center Spaces		16	133	569	702	578	1,280
License Exempt		3	-	24	24	150	174
Total Number of Providers		38					
Current Child Care Spaces			177	681	858	784	1,642
Percent Distribution			11%	41%	52%	48%	100%
EXISTING SURPLUS/(SHORTAGE)			(266)	10	(256)	(544)	(801)
Percentage of Demand Met by Existing Facilities/Spaces			40%	101%	77%	59%	67%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age.

For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 19
Estimated Future Child Care Demand in 2027
for City of Martinez
Contra Costa County Child Care Needs Assessment 2017

MARTINEZ-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(266)	10	(256)	(544)	(801)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	1,376	1,041	2,417	3,842	6,259
Labor Force Participation Rates	66%	66%	66%	71%	69%
Children with Working Parents	914	692	1,606	2,739	4,345
Percent of Children Needing Licensed Care	50%	100%	72%	50%	58%
Total Demand at 2027	457	692	1,149	1,369	2,519
Current Child Care Supply at 2017	177	681	858	784	1,642
Surplus/(Shortage) at 2027	(280)	(11)	(291)	(585)	(877)
Percentage of Demand Met by Existing Spaces	39%	98%	75%	57%	65%
Total Net New Demand - 2017 to 2027	(1)	14	21	35	76

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 20
Existing Child Care Demand and Supply in 2017
for Town of Moraga
Contra Costa County Child Care Needs Assessment 2017

MORAGA-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	285	348	633	1,610	2,243
Avg. Labor Force Participation Rates	(2)	63%	63%	63%	62%	62%
Children With Working Parents		180	220	400	998	1,398
% Children Needing Licensed Care	(3)	50%	100%	77%	50%	58%
Children Needing Licensed Care		90	220	310	499	809
Total Demand for Child Care Spaces		90	220	310	499	809
% Distribution of Total Demand for Spaces by Age Group		11%	27%	38%	62%	100%
% of Total Children Needing Licensed Care		32%	63%	49%	31%	36%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	4	8	16	24	32
Licensed for 14		0	-	-	-	-
Available Child Care Center Spaces		7	24	542	566	566
License Exempt		2	-	-	200	200
Total Number of Providers	13					
Current Child Care Spaces		32	558	590	208	798
Percent Distribution		4%	70%	74%	26%	100%
EXISTING SURPLUS/(SHORTAGE)		(58)	338	280	(291)	(11)
Percentage of Demand Met by Existing Facilities/Spaces		36%	254%	190%	42%	99%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 21
Estimated Future Child Care Demand in 2027
for Town of Moraga
Contra Costa County Child Care Needs Assessment 2017

MORAGA-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(58)	338	280	(291)	(11)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	298	363	661	1,681	2,342
Labor Force Participation Rates	63%	63%	63%	62%	62%
Children with Working Parents	188	229	417	1,042	1,460
Percent of Children Needing Licensed Care	50%	100%	77%	50%	58%
Total Demand at 2027	94	229	323	521	844
Current Child Care Supply at 2017	32	558	590	208	798
Surplus/(Shortage) at 2027	(62)	329	267	(313)	(46)
Percentage of Demand Met by Existing Spaces	34%	243%	182%	40%	94%
Total Net New Demand - 2017 to 2027	(1)	4	10	22	36

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 22
Existing Child Care Demand and Supply in 2017
for City of Oakley
Contra Costa County Child Care Needs Assessment 2017

OAKLEY-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	1,876	1,444	3,320	5,505	8,825
Avg. Labor Force Participation Rates	(2)	72%	72%	72%	77%	75%
Children With Working Parents		1,343	1,034	2,377	4,237	6,614
% Children Needing Licensed Care	(3)	50%	100%	72%	50%	58%
Children Needing Licensed Care		672	1,034	1,706	2,118	3,824
Total Demand for Child Care Spaces		672	1,034	1,706	2,118	3,824
% Distribution of Total Demand for Spaces by Age Group		18%	27%	45%	55%	100%
% of Total Children Needing Licensed Care		36%	72%	51%	38%	43%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	37	74	148	74	296
Licensed for 14		17	51	102	85	238
Available Child Care Center Spaces		7	-	277	26	303
License Exempt		1	-	-	100	100
Total Number of Providers		62				
Current Child Care Spaces		125	527	652	285	937
Percent Distribution		13%	56%	70%	30%	100%
EXISTING SURPLUS/(SHORTAGE)		(547)	(507)	(1,054)	(1,833)	(2,887)
Percentage of Demand Met by Existing Facilities/Spaces		19%	51%	38%	13%	25%

- (1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.
- (2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.
- (3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.
- (4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.
- (5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.
- Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 23
Estimated Future Child Care Demand in 2027
for City of Oakley
Contra Costa County Child Care Needs Assessment 2017

OAKLEY-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(547)	(507)	(1,054)	(1,833)	(2,887)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	2,108	1,623	3,730	6,184	9,915
Labor Force Participation Rates	72%	72%	72%	77%	75%
Children with Working Parents	1,509	1,162	2,671	4,760	7,431
Percent of Children Needing Licensed Care	50%	100%	72%	50%	58%
Total Demand at 2027	755	1,162	1,916	2,380	4,296
Current Child Care Supply at 2017	125	527	652	285	937
Surplus/(Shortage) at 2027	(630)	(635)	(1,264)	(2,095)	(3,359)
Percentage of Demand Met by Existing Spaces	17%	45%	34%	12%	22%
Total Net New Demand - 2017 to 2027 (1)	83	128	211	2,380	2,591

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County. A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 24
Existing Child Care Demand and Supply in 2017
for City of Orinda
Contra Costa County Child Care Needs Assessment 2017

ORINDA-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	439	458	897	2,229	3,127
Avg. Labor Force Participation Rates	(2)	44%	44%	44%	53%	50%
Children With Working Parents		194	203	397	1,178	1,575
% Children Needing Licensed Care	(3)	50%	100%	76%	50%	56%
Children Needing Licensed Care		97	203	300	589	889
Total Demand for Child Care Spaces		97	203	300	589	889
% Distribution of Total Demand for Spaces by Age Group		11%	23%	34%	66%	100%
% of Total Children Needing Licensed Care		22%	44%	33%	26%	28%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	4	8	16	24	32
Licensed for 14		2	6	12	10	28
Available Child Care Center Spaces		6	-	315	-	315
License Exempt		<u>1</u>	-	-	120	120
Total Number of Providers	13					
Current Child Care Spaces		14	343	357	138	495
Percent Distribution		3%	69%	72%	28%	100%
EXISTING SURPLUS/(SHORTAGE)		(83)	140	57	(451)	(394)
Percentage of Demand Met by Existing Facilities/Spaces		14%	169%	119%	23%	56%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 25
Estimated Future Child Care Demand in 2027
for City of Orinda
Contra Costa County Child Care Needs Assessment 2017

ORINDA-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(83)	140	57	(451)	(394)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	455	474	929	2,307	3,236
Labor Force Participation Rates	44%	44%	44%	53%	50%
Children with Working Parents	201	210	411	1,219	1,630
Percent of Children Needing Licensed Care	50%	100%	76%	50%	56%
Total Demand at 2027	101	210	311	609	920
Current Child Care Supply at 2017	14	343	357	138	495
Surplus/(Shortage) at 2027	(87)	133	46	(471)	(425)
Percentage of Demand Met by Existing Spaces	14%	163%	115%	23%	54%
Total Net New Demand - 2017 to 2027	(1)	3	7	21	31

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 26
Existing Child Care Demand and Supply in 2017
for City of Pinole
Contra Costa County Child Care Needs Assessment 2017

PINOLE-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	955	700	1,655	2,593	4,248
Avg. Labor Force Participation Rates	(2)	62%	62%	62%	74%	69%
Children With Working Parents		590	432	1,022	1,926	2,947
% Children Needing Licensed Care	(3)	50%	100%	71%	50%	57%
Children Needing Licensed Care		295	432	727	963	1,689
Total Demand for Child Care Spaces		295	432	727	963	1,689
% Distribution of Total Demand for Spaces by Age Group		17%	26%	43%	57%	100%
% of Total Children Needing Licensed Care		31%	62%	44%	37%	40%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	5	10	30	10	40
Licensed for 14		8	24	72	40	112
Available Child Care Center Spaces		6	-	119	153	272
License Exempt		0	-	-	-	-
Total Number of Providers	19					
Current Child Care Spaces		34	187	221	203	424
Percent Distribution		8%	44%	52%	48%	100%
EXISTING SURPLUS/(SHORTAGE)		(261)	(245)	(506)	(760)	(1,265)
Percentage of Demand Met by Existing Facilities/Spaces		12%	43%	30%	21%	25%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age.

For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.
 Prepared by Brion Economics, Inc. CCC City Demand Model FINAL 8.28.18

8/28/2018

Table 27
Estimated Future Child Care Demand in 2027
for City of Pinole
Contra Costa County Child Care Needs Assessment 2017

PINOLE-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(261)	(245)	(506)	(760)	(1,265)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	996	729	1,725	2,704	4,429
Labor Force Participation Rates	62%	62%	62%	74%	69%
Children with Working Parents	615	450	1,065	2,007	3,072
Percent of Children Needing Licensed Care	50%	100%	71%	50%	57%
Total Demand at 2027	307	450	758	1,004	1,761
Current Child Care Supply at 2017	34	187	221	203	424
Surplus/(Shortage) at 2027	(273)	(263)	(537)	(801)	(1,337)
Percentage of Demand Met by Existing Spaces	11%	42%	29%	20%	24%
Total Net New Demand - 2017 to 2027	(1)	13	31	41	72

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 28
Existing Child Care Demand and Supply in 2017
for City of Pittsburgh
Contra Costa County Child Care Needs Assessment 2017

PITTSBURG-EXISTING		No. of Providers	Child Care Demand as of 2017				
			Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND							
Estimated Total Children	(1)		4,265	3,421	7,686	10,864	18,550
Avg. Labor Force Participation Rates	(2)		66%	66%	66%	65%	65%
Children With Working Parents			2,827	2,268	5,094	7,028	12,123
% Children Needing Licensed Care	(3)		50%	100%	72%	50%	59%
Children Needing Licensed Care			1,413	2,268	3,681	3,514	7,195
Total Demand for Child Care Spaces			1,413	2,268	3,681	3,514	7,195
% Distribution of Total Demand for Spaces by Age Group			20%	32%	51%	49%	100%
% of Total Children Needing Licensed Care			33%	66%	48%	32%	39%
EXISTING SUPPLY							
Family Child Care Homes Supply	(4)						
Licensed for 8	(5)	42	84	168	252	84	336
Licensed for 14		21	63	126	189	105	294
Available Child Care Center Spaces		26	92	1,599	1,691	198	1,889
License Exempt		<u>12</u>	-	-	-	1,179	1,179
Total Number of Providers		101					
Current Child Care Spaces			239	1,893	2,132	1,566	3,698
Percent Distribution			6%	51%	58%	42%	100%
EXISTING SURPLUS/(SHORTAGE)			(1,174)	(375)	(1,549)	(1,948)	(3,497)
Percentage of Demand Met by Existing Facilities/Spaces			17%	83%	58%	45%	51%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 29
Estimated Future Child Care Demand in 2027
for City of Pittsburgh
Contra Costa County Child Care Needs Assessment 2017

PITTSBURG-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(1,174)	(375)	(1,549)	(1,948)	(3,497)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	4,658	3,737	8,395	11,867	20,262
Labor Force Participation Rates	66%	66%	66%	65%	65%
Children with Working Parents	3,087	2,477	5,564	7,677	13,241
Percent of Children Needing Licensed Care	50%	100%	72%	50%	59%
Total Demand at 2027	1,544	2,477	4,021	3,838	7,859
Current Child Care Supply at 2017	239	1,893	2,132	1,566	3,698
Surplus/(Shortage) at 2027	(1,305)	(584)	(1,889)	(2,272)	(4,161)
Percentage of Demand Met by Existing Spaces	15%	76%	53%	41%	47%
Total Net New Demand - 2017 to 2027	(1)	130	340	324	664

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 30
Existing Child Care Demand and Supply in 2017
for City of Pleasant Hill
Contra Costa County Child Care Needs Assessment 2017

PLEASANT HILL-EXISTING		No. of Providers	Child Care Demand as of 2017				
			Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND							
Estimated Total Children	(1)		1,313	1,069	2,382	3,438	5,820
Avg. Labor Force Participation Rates	(2)		61%	61%	61%	66%	64%
Children With Working Parents			804	654	1,458	2,257	3,715
% Children Needing Licensed Care	(3)		50%	100%	72%	50%	59%
Children Needing Licensed Care			402	654	1,056	1,128	2,185
Total Demand for Child Care Spaces			402	654	1,056	1,128	2,185
% Distribution of Total Demand for Spaces by Age Group			18%	30%	48%	52%	100%
% of Total Children Needing Licensed Care			31%	61%	44%	33%	38%
EXISTING SUPPLY							
Family Child Care Homes Supply	(4)						
Licensed for 8	(5)	20	40	80	120	40	160
Licensed for 14		16	48	96	144	80	224
Available Child Care Center Spaces		18	84	612	696	518	1,214
License Exempt		<u>3</u>	-	-	-	345	345
Total Number of Providers		57					
Current Child Care Spaces			172	788	960	983	1,943
Percent Distribution			9%	41%	49%	51%	100%
EXISTING SURPLUS/(SHORTAGE)			(230)	134	(96)	(145)	(242)
Percentage of Demand Met by Existing Facilities/Spaces			43%	120%	91%	87%	89%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 31
Estimated Future Child Care Demand in 2027
for City of Pleasant Hill
Contra Costa County Child Care Needs Assessment 2017

PLEASANT HILL-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(230)	134	(96)	(145)	(242)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	1,356	1,104	2,460	3,551	6,011
Labor Force Participation Rates	61%	61%	61%	66%	64%
Children with Working Parents	830	676	1,506	2,331	3,837
Percent of Children Needing Licensed Care	50%	100%	72%	50%	59%
Total Demand at 2027	415	676	1,091	1,165	2,256
Current Child Care Supply at 2017	172	788	960	983	1,943
Surplus/(Shortage) at 2027	(243)	112	(131)	(182)	(313)
Percentage of Demand Met by Existing Spaces	41%	117%	88%	84%	86%
Total Net New Demand - 2017 to 2027	(1)	13	21	35	72

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 32
Existing Child Care Demand and Supply in 2017
for City of Richmond
Contra Costa County Child Care Needs Assessment 2017

RICHMOND-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	5,857	4,390	10,247	13,845	24,092
Avg. Labor Force Participation Rates	(2)	66%	66%	66%	67%	67%
Children With Working Parents		3,890	2,915	6,805	9,244	16,049
% Children Needing Licensed Care	(3)	50%	100%	71%	50%	59%
Children Needing Licensed Care		1,945	2,915	4,860	4,622	9,482
Total Demand for Child Care Spaces		1,945	2,915	4,860	4,622	9,482
% Distribution of Total Demand for Spaces by Age Group		21%	31%	51%	49%	100%
% of Total Children Needing Licensed Care		33%	66%	47%	33%	39%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	59	118	236	354	472
Licensed for 14		52	158	316	250	724
Available Child Care Center Spaces		37	331	1,696	2,027	2,275
License Exempt		15	-	-	1,506	1,506
Total Number of Providers		163				
Current Child Care Spaces		607	2,248	2,855	2,122	4,977
Percent Distribution		12%	45%	57%	43%	100%
EXISTING SURPLUS/(SHORTAGE)		(1,338)	(667)	(2,005)	(2,500)	(4,505)
Percentage of Demand Met by Existing Facilities/Spaces		31%	77%	59%	46%	52%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 33
Estimated Future Child Care Demand in 2027
for City of Richmond
Contra Costa County Child Care Needs Assessment 2017

RICHMOND-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(1,338)	(667)	(2,005)	(2,500)	(4,505)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	6,312	4,731	11,043	14,921	25,964
Labor Force Participation Rates	66%	66%	66%	67%	67%
Children with Working Parents	4,192	3,142	7,334	9,962	17,295
Percent of Children Needing Licensed Care	50%	100%	71%	50%	59%
Total Demand at 2027	2,096	3,142	5,238	4,981	10,219
Current Child Care Supply at 2017	607	2,248	2,855	2,122	4,977
Surplus/(Shortage) at 2027	(1,489)	(894)	(2,383)	(2,859)	(5,242)
Percentage of Demand Met by Existing Spaces	29%	72%	55%	43%	49%
Total Net New Demand - 2017 to 2027 (1)	151	226	377	359	736

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 34
Existing Child Care Demand and Supply in 2017
for City of San Pablo
Contra Costa County Child Care Needs Assessment 2017

SAN PABLO-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	1,736	1,339	3,075	4,259	7,334
Avg. Labor Force Participation Rates	(2)	63%	63%	63%	68%	66%
Children With Working Parents		1,100	848	1,948	2,883	4,831
% Children Needing Licensed Care	(3)	50%	100%	72%	50%	59%
Children Needing Licensed Care		550	848	1,398	1,441	2,840
Total Demand for Child Care Spaces		550	848	1,398	1,441	2,840
% Distribution of Total Demand for Spaces by Age Group		19%	30%	49%	51%	100%
% of Total Children Needing Licensed Care		32%	63%	45%	34%	39%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	12	24	48	72	96
Licensed for 14		30	30	60	50	140
Available Child Care Center Spaces		11	79	320	242	641
License Exempt		7	-	-	705	705
Total Number of Providers	60					
Current Child Care Spaces		133	428	561	1,021	1,582
Percent Distribution		8%	27%	35%	65%	100%
EXISTING SURPLUS/(SHORTAGE)		(417)	(420)	(837)	(420)	(1,258)
Percentage of Demand Met by Existing Facilities/Spaces		24%	50%	40%	71%	56%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 35
Estimated Future Child Care Demand in 2027
for City of San Pablo
Contra Costa County Child Care Needs Assessment 2017

SAN PABLO-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(417)	(420)	(837)	(420)	(1,258)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	1,841	1,421	3,262	4,519	7,781
Labor Force Participation Rates	63%	63%	63%	68%	66%
Children with Working Parents	1,167	900	2,067	3,059	5,126
Percent of Children Needing Licensed Care	50%	100%	72%	50%	59%
Total Demand at 2027	583	900	1,484	1,529	3,013
Current Child Care Supply at 2017	133	428	561	1,021	1,582
Surplus/(Shortage) at 2027	(450)	(472)	(923)	(508)	(1,431)
Percentage of Demand Met by Existing Spaces	23%	48%	38%	67%	53%
Total Net New Demand - 2017 to 2027	(1)	34	85	88	173

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 36
Existing Child Care Demand and Supply in 2017
for City of San Ramon
Contra Costa County Child Care Needs Assessment 2017

SAN RAMON-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	3,393	3,108	6,502	10,670	17,172
Avg. Labor Force Participation Rates	(2)	62%	62%	62%	63%	62%
Children With Working Parents		2,094	1,918	4,012	6,714	10,725
% Children Needing Licensed Care	(3)	50%	100%	74%	50%	59%
Children Needing Licensed Care		1,047	1,918	2,965	3,357	6,322
Total Demand for Child Care Spaces		1,047	1,918	2,965	3,357	6,322
% Distribution of Total Demand for Spaces by Age Group		17%	30%	47%	53%	100%
% of Total Children Needing Licensed Care		31%	62%	46%	31%	37%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	50	100	300	100	400
Licensed for 14		19	63	189	65	254
Available Child Care Center Spaces		22	57	957	1,377	2,334
License Exempt		0	-	-	-	-
Total Number of Providers		91				
Current Child Care Spaces		220	1,226	1,446	1,542	2,988
Percent Distribution		7%	41%	48%	52%	100%
EXISTING SURPLUS/(SHORTAGE)			(827)	(692)	(1,519)	(1,815)
Percentage of Demand Met by Existing Facilities/Spaces			21%	64%	49%	46%
						47%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 37
Estimated Future Child Care Demand in 2027
for City of San Ramon
Contra Costa County Child Care Needs Assessment 2017

SAN RAMON-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(827)	(692)	(1,519)	(1,815)	(3,334)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	3,575	3,275	6,851	11,243	18,094
Labor Force Participation Rates	62%	62%	62%	63%	62%
Children with Working Parents	2,206	2,021	4,227	7,074	11,301
Percent of Children Needing Licensed Care	50%	100%	74%	50%	59%
Total Demand at 2027	1,103	2,021	3,124	3,537	6,661
Current Child Care Supply at 2017	220	1,226	1,446	1,542	2,988
Surplus/(Shortage) at 2027	(883)	(795)	(1,678)	(1,995)	(3,673)
Percentage of Demand Met by Existing Spaces	20%	61%	46%	44%	45%
Total Net New Demand - 2017 to 2027	(1)	56	103	180	339

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County. A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 38
Existing Child Care Demand and Supply in 2017
for City of Walnut Creek
Contra Costa County Child Care Needs Assessment 2017

WALNUT CREEK-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	2,065	1,712	3,777	6,266	10,042
Avg. Labor Force Participation Rates	(2)	71%	71%	71%	70%	71%
Children With Working Parents		1,466	1,215	2,681	4,400	7,080
% Children Needing Licensed Care	(3)	50%	100%	73%	50%	59%
Children Needing Licensed Care		733	1,215	1,948	2,200	4,148
Total Demand for Child Care Spaces		733	1,215	1,948	2,200	4,148
% Distribution of Total Demand for Spaces by Age Group		18%	29%	47%	53%	100%
% of Total Children Needing Licensed Care		35%	71%	52%	35%	41%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	14	28	84	28	112
Licensed for 14		21	63	189	105	294
Available Child Care Center Spaces		33	61	1,281	1,196	2,538
License Exempt		2	-	-	100	100
Total Number of Providers		70				
Current Child Care Spaces		152	1,463	1,615	1,429	3,044
Percent Distribution		5%	48%	53%	47%	100%
EXISTING SURPLUS/(SHORTAGE)		(581)	248	(333)	(771)	(1,104)
Percentage of Demand Met by Existing Facilities/Spaces		21%	120%	83%	65%	73%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 39
Estimated Future Child Care Demand in 2027
for City of Walnut Creek
Contra Costa County Child Care Needs Assessment 2017

WALNUT CREEK-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(581)	248	(333)	(771)	(1,104)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	2,194	1,818	4,012	6,656	10,668
Labor Force Participation Rates	71%	71%	71%	70%	71%
Children with Working Parents	1,557	1,291	2,848	4,674	7,522
Percent of Children Needing Licensed Care	50%	100%	73%	50%	59%
Total Demand at 2027	779	1,291	2,069	2,337	4,406
Current Child Care Supply at 2017	152	1,463	1,615	1,429	3,044
Surplus/(Shortage) at 2027	(627)	172	(454)	(908)	(1,362)
Percentage of Demand Met by Existing Spaces	20%	113%	78%	61%	69%
Total Net New Demand - 2017 to 2027	(1)	46	121	137	259

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 40
Existing Child Care Demand and Supply in 2017
for Region of Alamo-Blackhawk
Contra Costa County Child Care Needs Assessment 2017

ALAMO-BLACKHAWK-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	517	547	1,063	3,009	4,073
Avg. Labor Force Participation Rates	(2)	37%	37%	37%	48%	45%
Children With Working Parents		194	205	398	1,430	1,828
% Children Needing Licensed Care	(3)	50%	100%	76%	50%	56%
Children Needing Licensed Care		97	205	302	715	1,016
Total Demand for Child Care Spaces		97	205	302	715	1,016
% Distribution of Total Demand for Spaces by Age Group		10%	20%	30%	70%	100%
% of Total Children Needing Licensed Care		19%	37%	28%	24%	25%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	2	4	8	12	16
Licensed for 14		2	6	12	10	28
Available Child Care Center Spaces		7	-	237	140	377
License Exempt		0	-	-	-	-
Total Number of Providers	11					
Current Child Care Spaces		10	257	267	154	421
Percent Distribution		2%	61%	63%	37%	100%
EXISTING SURPLUS/(SHORTAGE)		(87)	52	(35)	(561)	(595)
Percentage of Demand Met by Existing Facilities/Spaces		10%	126%	89%	22%	41%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 41
Estimated Future Child Care Demand in 2027
for Region of Alamo-Blackhawk
Contra Costa County Child Care Needs Assessment 2017

ALAMO-BLACKHAWK-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(87)	52	(35)	(561)	(595)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	525	555	1,081	3,059	4,139
Labor Force Participation Rates	37%	37%	37%	48%	45%
Children with Working Parents	197	208	405	1,453	1,858
Percent of Children Needing Licensed Care	50%	100%	76%	50%	56%
Total Demand at 2027	98	208	307	727	1,033
Current Child Care Supply at 2017	10	257	267	154	421
Surplus/(Shortage) at 2027	(88)	49	(40)	(573)	(612)
Percentage of Demand Met by Existing Spaces	10%	123%	87%	21%	41%
Total Net New Demand - 2017 to 2027	(1)	2	5	12	17

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 42
Existing Child Care Demand and Supply in 2017
for Region of Rodeo-Crockett
Contra Costa County Child Care Needs Assessment 2017

RODEO-CROCKETT-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	386	321	708	1,142	1,850
Avg. Labor Force Participation Rates	(2)	62%	62%	62%	77%	71%
Children With Working Parents		239	199	438	882	1,320
% Children Needing Licensed Care	(3)	50%	100%	73%	50%	58%
Children Needing Licensed Care		120	199	318	441	760
Total Demand for Child Care Spaces		120	199	318	441	760
% Distribution of Total Demand for Spaces by Age Group		16%	26%	42%	58%	100%
% of Total Children Needing Licensed Care		31%	62%	45%	39%	41%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	3	6	12	6	24
Licensed for 14		2	6	18	10	28
Available Child Care Center Spaces		6	76	213	20	309
License Exempt		0	-	-	-	-
Total Number of Providers	11					
Current Child Care Spaces		88	237	325	36	361
Percent Distribution		24%	66%	90%	10%	100%
EXISTING SURPLUS/(SHORTAGE)		(32)	38	7	(405)	(399)
Percentage of Demand Met by Existing Facilities/Spaces		74%	119%	102%	8%	48%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months.

Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.

Table 43
Estimated Future Child Care Demand in 2027
for Region of Rodeo-Crockett
Contra Costa County Child Care Needs Assessment 2017

RODEO-CROCKETT-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(32)	38	7	(405)	(399)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	396	330	726	1,172	1,899
Labor Force Participation Rates	62%	62%	62%	77%	71%
Children with Working Parents	245	204	449	906	1,355
Percent of Children Needing Licensed Care	50%	100%	73%	50%	58%
Total Demand at 2027	123	204	327	453	779
Current Child Care Supply at 2017	88	237	325	36	361
Surplus/(Shortage) at 2027	(35)	33	(2)	(417)	(418)
Percentage of Demand Met by Existing Spaces	72%	116%	99%	8%	46%
Total Net New Demand - 2017 to 2027	(1)	3	5	12	20

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 44
Existing Child Care Demand and Supply in 2017
for East Rural Contra Costa County
Contra Costa County Child Care Needs Assessment 2017

EAST RURAL CONTRA COSTA COUNTY-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	692	586	1,278	2,492	3,770
Avg. Labor Force Participation Rates	(2)	75%	75%	75%	71%	73%
Children With Working Parents		522	442	964	1,770	2,734
% Children Needing Licensed Care	(3)	50%	100%	73%	50%	58%
Children Needing Licensed Care		261	442	703	885	1,588
Total Demand for Child Care Spaces		261	442	703	885	1,588
% Distribution of Total Demand for Spaces by Age Group		16%	28%	44%	56%	100%
% of Total Children Needing Licensed Care		38%	75%	55%	36%	42%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	8	16	32	48	64
Licensed for 14		2	6	12	18	28
Available Child Care Center Spaces		2	-	90	-	90
License Exempt		2	-	-	200	200
Total Number of Providers	14					
Current Child Care Spaces		22	134	156	226	382
Percent Distribution		6%	35%	41%	59%	100%
EXISTING SURPLUS/(SHORTAGE)		(239)	(308)	(547)	(659)	(1,206)
Percentage of Demand Met by Existing Facilities/Spaces		8%	30%	22%	26%	24%

(1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.

(2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.

(3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.

(4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.

(5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Table 45
Estimated Future Child Care Demand in 2027
for East Rural Contra Costa County
Contra Costa County Child Care Needs Assessment 2017

EAST RURAL CONTRA COSTA COUNTY-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(239)	(308)	(547)	(659)	(1,206)
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	711	602	1,313	2,561	3,874
Labor Force Participation Rates	75%	75%	75%	71%	73%
Children with Working Parents	536	454	990	1,819	2,809
Percent of Children Needing Licensed Care	50%	100%	73%	50%	58%
Total Demand at 2027	268	454	722	909	1,631
Current Child Care Supply at 2017	22	134	156	226	382
Surplus/(Shortage) at 2027	(246)	(320)	(566)	(683)	(1,249)
Percentage of Demand Met by Existing Spaces	8%	30%	22%	25%	23%
Total Net New Demand - 2017 to 2027	(1)	7	12	24	44

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 46
Existing Child Care Demand and Supply in 2017
for Contra Costa County
Contra Costa County Child Care Needs Assessment 2017

CONTRA COSTA COUNTY-EXISTING	No. of Providers	Child Care Demand as of 2017				
		Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
EXISTING DEMAND						
Estimated Total Children	(1)	41,476	33,857	75,332	120,185	195,517
Avg. Labor Force Participation Rates	(2)	64%	64%	64%	67%	66%
Children With Working Parents		26,599	21,713	48,311	80,698	129,009
% Children Needing Licensed Care	(3)	50%	100%	73%	50%	58%
Children Needing Licensed Care		13,368	21,739	35,108	40,034	75,141
Total Demand for Child Care Spaces		13,368	21,739	35,108	40,034	75,141
% Distribution of Total Demand for Spaces by Age Group		18%	29%	47%	53%	100%
% of Total Children Needing Licensed Care		32%	64%	47%	33%	38%
EXISTING SUPPLY						
Family Child Care Homes Supply	(4)					
Licensed for 8	(5)	491	982	2,946	982	3,928
Licensed for 14		333	951	2,853	1,505	4,358
Available Child Care Center Spaces		348	1,459	16,320	8,275	24,595
License Exempt		71	6	364	6,531	6,895
Total Number of Providers		1,243				
Current Child Care Spaces		3,398	19,085	22,483	17,293	39,776
Percent Distribution		9%	48%	57%	43%	100%
EXISTING SURPLUS/(SHORTAGE)			(9,970)	(2,654)	(12,625)	(22,741)
Percent Distribution		28%	8%	36%	64%	100%
Percentage of Demand Met by Existing Facilities/Spaces		25%	88%	64%	43%	53%

Note: County totals are based on the sum of the totals for each of the cities in the study.

- (1) Based on estimated number of children by area using ABAG Projections 2013. Infants include 2 year olds up to 35 months. Preschool includes 25% of 5-year-olds and School Age includes 75% of 5-year-olds.
- (2) Labor force participation rates are from the 2015 American Community Survey 5-Year Estimates and include children with two working parents or single working parents. Rates vary by age: under 6 years, and 6 and over.
- (3) Not all children with working parents are assumed to need licensed care: percentage assumptions under each age category are used. The remaining children are assumed to be cared for by family members, nannies, friends, and unlicensed care. Percentages were decided upon by the study's data committee and deviate somewhat from most of BEI's Needs Assessments, particularly for Infant and School Age care.
- (4) Data on child care supply provided by Contra Costa Child Care Council (CocoKids), Aug 2017.
- (5) Family Child Care Home spaces by age are broken down by licensing regulations. It is assumed that for small FCCHs, 2 spaces are infant, 4 are preschool, and 2 are school age. For large FCCHs, it is assumed that of Licenses for 14 include 3 infant spaces, 6 preschool spaces, and 5 school age. Licenses for 12 breakdown to 4 infant and 8 preschool.

Sources: ABAG Projections 2013; 2010 U.S. Census; American Community Survey 2015; Brion Economics, Inc.
 Prepared by Brion Economics, Inc. CCC City Demand Model FINAL 8.28.18

8/28/2018

Table 47
Estimated Future Child Care Demand in 2027
for Contra Costa County
Contra Costa County Child Care Needs Assessment 2017

CONTRA COSTA COUNTY-FUTURE	Child Care Demand and Supply by Age Categories				
	Birth to 2 or Infant	3 to 4 or Preschool	Subtotal, 0 to 4 Years	5 to 12 or School Age	Total, 0 to 12 Years
Current Surplus/(Shortage) at 2017	(9,970)	(2,654)	(12,625)	(22,741)	(35,365)
	3,398	19,085	22,483	17,293	39,776
<i>Future Demand For Child Care at 2027</i>					
Estimated Children at 2027	44,327	36,125	80,452	127,945	208,397
Labor Force Participation Rates	64%	64%	64%	67%	66%
Children with Working Parents	28,427	23,167	51,595	85,908	137,503
Percent of Children Needing Licensed Care	50%	100%	73%	50%	58%
Total Demand at 2027	14,301	23,220	37,520	42,664	80,184
Current Child Care Supply at 2017	3,398	19,085	22,483	17,293	39,776
Surplus/(Shortage) at 2027	(10,903)	(4,135)	(15,037)	(25,371)	(40,408)
Percentage of Demand Met by Existing Spaces	24%	82%	60%	41%	50%
Total Net New Demand - 2017 to 2027	(1)	932	2,413	2,631	5,043

Note: County totals are based on the sum of the totals for each of the cities in the study.

(1) A positive number means a net increase in demand for spaces from 2017 to 2027. This figure represents the amount of new child care that could be funded through impact fees or other financing mechanisms adopted by individual cities or the County.

A negative number represents an overall loss of children in this age category from 2017 to 2027.

Sources: ABAG Projections 2013; 2010 U.S. Census; Brion Economics, Inc.

Table 48
Demographic Forecast by Area in 2017
Contra Costa County Child Care Needs Assessment 2017

	2017	2017	2017	2017	2017	2017	2017	2017
City/Area	Antioch	Brentwood	Clayton	Concord	Danville	El Cerrito	Hercules	Lafayette
Population (1,2)	108,720	54,380	11,300	133,320	45,580	30,760	28,420	26,420
Percent Distribution	9.7%	4.9%	1.0%	11.9%	4.1%	2.7%	2.5%	2.4%
Population by Age (2)								
0-35 Months	4,534	2,105	262	5,436	1,170	1,036	976	704
3-4 years	3,602	1,929	261	4,077	1,193	792	745	690
5-9 years	7,798	4,569	743	7,720	3,345	1,516	1,653	1,806
10-12 years	<u>5,245</u>	<u>3,103</u>	<u>540</u>	<u>4,767</u>	<u>2,330</u>	<u>750</u>	<u>1,048</u>	<u>1,191</u>
Total Children 0-12 years	21,179	11,706	1,806	22,000	8,037	4,094	4,421	4,391
Percent Distribution	10.8%	6.0%	0.9%	11.3%	4.1%	2.1%	2.3%	2.2%
Percent of Population by Age (2)								
0-35 Months	4.2%	3.9%	2.3%	4.1%	2.6%	3.4%	3.4%	2.7%
3-4 years	3.3%	3.5%	2.3%	3.1%	2.6%	2.6%	2.6%	2.6%
5-9 years	7.2%	8.4%	6.6%	5.8%	7.3%	4.9%	5.8%	6.8%
10-12 years	<u>4.8%</u>	<u>5.7%</u>	<u>4.8%</u>	<u>3.6%</u>	<u>5.1%</u>	<u>2.4%</u>	<u>3.7%</u>	<u>4.5%</u>
Total Children 0-12 years	19.5%	21.5%	16.0%	16.5%	17.6%	13.3%	15.6%	16.6%
Labor Force Participation Rates (3)								
With children under 6 years	66%	65%	79%	61%	59%	64%	78%	54%
With children 6-17 years	69%	68%	65%	67%	58%	74%	76%	64%
Households (1)	34,320	17,340	4,126	48,094	16,510	13,248	9,452	10,172
Percent Distribution	9%	4%	1%	12%	4%	3%	2%	3%
Employment (1)	22,006	9,932	1,732	58,906	15,346	7,264	5,126	11,108
Percent Distribution	6%	3%	0%	15%	4%	2%	1%	3%

(1) Based on ABAG Projections 2013, and children as % of population based on the breakdown from the U.S. Census 2010.

(2) Based on age as percentage of population for the U.S. Census 2010. Preschool includes 25% of 5 year olds and School Age includes 75% of 5 year olds.

(3) Rural East Contra Costa County Population by Age and LFPR is based on an average of the percentages for Oakley and Clayton.

(4) LFPR for Remainder are same as for Rural East County as these rates are not available for a "remainder" area.

Sources: ABAG Projections 2013; American Community Survey 2015; U.S. Census 2010; Brion Economics, Inc.

Continued

Table 48
Demographic Forecast by Area in 2017
Contra Costa County Child Care Needs Assessment 2017

	2017	2017	2017	2017	2017	2017	2017	2017
City/Area	Martinez	Moraga	Oakley	Orinda	Pinole	Pittsburg	Pleasant Hill	Richmond
Population (1,2)	44,380	16,860	41,780	18,320	31,040	93,000	41,440	132,100
Percent Distribution	4.0%	1.5%	3.7%	1.6%	2.8%	8.3%	3.7%	11.8%
Population by Age (2)								
0-35 Months	1,334	285	1,876	439	955	4,265	1,313	5,857
3-4 years	1,010	348	1,444	458	700	3,421	1,069	4,390
5-9 years	2,284	947	3,251	1,321	1,501	6,776	2,150	8,547
10-12 years	<u>1,442</u>	<u>663</u>	<u>2,253</u>	<u>909</u>	<u>1,092</u>	<u>4,088</u>	<u>1,289</u>	<u>5,298</u>
Total Children 0-12 years	6,070	2,243	8,825	3,127	4,248	18,550	5,820	24,092
Percent Distribution	3.1%	1.1%	4.5%	1.6%	2.2%	9.5%	3.0%	12.3%
Percent of Population by Age (2)								
0-35 Months	3.0%	1.7%	4.5%	2.4%	3.1%	4.6%	3.2%	4.4%
3-4 years	2.3%	2.1%	3.5%	2.5%	2.3%	3.7%	2.6%	3.3%
5-9 years	5.1%	5.6%	7.8%	7.2%	4.8%	7.3%	5.2%	6.5%
10-12 years	<u>3.2%</u>	<u>3.9%</u>	<u>5.4%</u>	<u>5.0%</u>	<u>3.5%</u>	<u>4.4%</u>	<u>3.1%</u>	<u>4.0%</u>
Total Children 0-12 years	13.7%	13.3%	21.1%	17.1%	13.7%	19.9%	14.0%	18.2%
Labor Force Participation Rates (3)								
With children under 6 years	66%	63%	72%	44%	62%	66%	61%	66%
With children 6-17 years	71%	62%	77%	53%	74%	65%	66%	67%
Households (1)	17,322	5,824	12,742	6,784	10,810	28,192	17,250	45,942
Percent Distribution	4%	1%	3%	2%	3%	7%	4%	12%
Employment (1)	23,206	5,188	4,978	6,118	8,300	17,896	21,678	39,328
Percent Distribution	6%	1%	1%	2%	2%	5%	6%	10%

(1) Based on ABAG Projections 2013, and children as % of population based on the breakdown from the U.S. Census 2010.

(2) Based on age as percentage of population for the U.S. Census 2010. Preschool includes 25% of 5 year olds and School Age includes 75% of 5 year olds.

(3) Rural East Contra Costa County Population by Age and LFPR is based on an average of the percentages for Oakley and Clayton.

(4) LFPR for Remainder are same as for Rural East County as these rates are not available for a "remainder" area.

Sources: ABAG Projections 2013; American Community Survey 2015; U.S. Census 2010; Brion Economics, Inc.

Continued

Table 48
Demographic Forecast by Area in 2017
Contra Costa County Child Care Needs Assessment 2017

	2017	2017	2017	2017	2017	2017	2017	2017
City/Area	San Pablo	San Ramon	Walnut Creek	Alamo-Blackhawk	Rodeo-Crockett	Rural East C.C. County (3)	Remainder (4)	Total County or Average
Population (1,2)	35,440	77,500	87,240	25,600	12,160	20,320	4,380	1,120,460
Percent Distribution	3.2%	6.9%	7.8%	2.3%	1.1%	1.8%	0.4%	100%
Population by Age (2)								
0-35 Months	1,736	3,393	2,065	517	386	692	139	41,476
3-4 years	1,339	3,108	1,712	547	321	586	116	33,857
5-9 years	2,678	6,784	3,792	1,645	681	1,459	245	73,209
10-12 years	<u>1,581</u>	<u>3,886</u>	<u>2,474</u>	<u>1,364</u>	<u>462</u>	<u>1,034</u>	<u>166</u>	<u>46,977</u>
Total Children 0-12 years	7,334	17,172	10,042	4,073	1,850	3,770	666	195,517
Percent Distribution	3.8%	8.8%	5.1%	2.1%	0.9%	1.9%	0.3%	100%
Percent of Population by Age (2)								
0-35 Months	4.9%	4.4%	2.4%	2.0%	3.2%	3.4%	3.2%	3.7%
3-4 years	3.8%	4.0%	2.0%	2.1%	2.6%	2.9%	2.6%	3.0%
5-9 years	7.6%	8.8%	4.3%	6.4%	5.6%	7.2%	5.6%	6.5%
10-12 years	<u>4.5%</u>	<u>5.0%</u>	<u>2.8%</u>	<u>5.3%</u>	<u>3.8%</u>	<u>5.1%</u>	<u>3.8%</u>	<u>4.2%</u>
Total Children 0-12 years	20.7%	22.2%	11.5%	15.9%	15.2%	18.6%	15.2%	17.4%
Labor Force Participation Rates (3)								
With children under 6 years	63%	62%	71%	37%	62%	75.4%	75.4%	64.1%
With children 6-17 years	68%	63%	70%	48%	77%	71.0%	71.0%	67.1%
Households (1)	10,612	27,182	40,792	9,036	4,482	7,344	1,634	399,210
Percent Distribution	3%	7%	10%	2%	1%	2%	0%	100%
Employment (1)	8,436	49,922	60,606	8,410	2,462	3,838	1,004	392,790
Percent Distribution	2%	13%	15%	2%	1%	1%	0%	100%

(1) Based on ABAG Projections 2013, and children as % of population based on the breakdown from the U.S. Census 2010.

(2) Based on age as percentage of population for the U.S. Census 2010. Preschool includes 25% of 5 year olds and School Age includes 75% of 5 year olds.

(3) Rural East Contra Costa County Population by Age and LFPR is based on an average of the percentages for Oakley and Clayton.

(4) LFPR for Remainder are same as for Rural East County as these rates are not available for a "remainder" area.

Sources: ABAG Projections 2013; American Community Survey 2015; U.S. Census 2010; Brion Economics, Inc.

Table 49
Demographic Forecast by Area in 2027
Contra Costa County Child Care Needs Assessment 2017

	2027	2027	2027	2027	2027	2027	2027	2027
City/Area	Antioch	Brentwood	Clayton	Concord	Danville	El Cerrito	Hercules	Lafayette
Population (1,2)	114,320	56,560	11,600	148,000	46,880	31,920	32,380	27,480
Percent Distribution	10%	5%	1%	12%	4%	3%	3%	2%
Population by Age (1)								
0-35 Months	4,767	2,190	269	6,034	1,203	1,075	1,112	733
3-4 years	3,788	2,006	268	4,526	1,227	822	849	717
5-9 years	8,199	4,752	763	8,570	3,440	1,573	1,883	1,878
10-12 years	<u>5,515</u>	<u>3,228</u>	<u>555</u>	<u>5,292</u>	<u>2,396</u>	<u>778</u>	<u>1,194</u>	<u>1,239</u>
Total Children 0-12 years	22,269	12,175	1,854	24,422	8,267	4,248	5,037	4,567
Percent Distribution	10.7%	5.8%	0.9%	11.7%	4.0%	2.0%	2.4%	2.2%
Percent of Population by Age (1)								
0-35 Months	4.2%	3.9%	2.3%	4.1%	2.6%	3.4%	3.4%	2.7%
3-4 years	3.3%	3.5%	2.3%	3.1%	2.6%	2.6%	2.6%	2.6%
5-9 years	7.2%	8.4%	6.6%	5.8%	7.3%	4.9%	5.8%	6.8%
10-12 years	<u>4.8%</u>	<u>5.7%</u>	<u>4.8%</u>	<u>3.6%</u>	<u>5.1%</u>	<u>2.4%</u>	<u>3.7%</u>	<u>4.5%</u>
Total Children 0-12 years	19.5%	21.5%	16.0%	16.5%	17.6%	13.3%	15.6%	16.6%
Labor Force Participation Rates (2)								
With children under 6 years	66%	65%	79%	61%	59%	64%	78%	54%
With children 6-17 years	69%	68%	65%	67%	58%	74%	76%	64%
Households (1)	36,062	17,938	4,210	52,938	16,932	13,668	10,660	10,560
Percent Distribution	9%	4%	1%	13%	4%	3%	3%	2%
Employment (1)	23,712	10,726	1,856	64,906	16,464	7,702	5,810	11,790
Percent Distribution	6%	3%	0%	15%	4%	2%	1%	3%

(1) Based on ABAG Projections 2013, and children as % of population based on the breakdown from the U.S. Census 2010.

(2) Based on age as percentage of population for the U.S. Census 2010. Preschool includes 25% of 5 year olds and School Age includes 75% of 5 year olds.

(3) Rural East Contra Costa County Population by Age and LFPR is based on an average of the percentages for Oakley and Clayton.

(4) LFPR for Remainder are same as for Rural East County as these rates are not available for a "remainder" area.

Sources: ABAG Projections 2013; American Community Survey 2015; U.S. Census 2010; Brion Economics, Inc.

Continued

Table 49

Demographic Forecast by Area in 2027

Continued

Contra Costa County Child Care Needs Assessment 2017

	2027	2027	2027	2027	2027	2027	2027	2027
City/Area	Martinez	Moraga	Oakley	Orinda	Pinole	Pittsburg	Pleasant Hill	Richmond
Population (1,2)	45,760	17,600	46,940	18,960	32,360	101,580	42,800	142,360
Percent Distribution	4%	1%	4%	2%	3%	9%	4%	12%
Population by Age (1)								
0-35 Months	1,376	298	2,108	455	996	4,658	1,356	6,312
3-4 years	1,041	363	1,623	474	729	3,737	1,104	4,731
5-9 years	2,355	988	3,653	1,367	1,565	7,401	2,220	9,211
10-12 years	<u>1,487</u>	<u>692</u>	<u>2,532</u>	<u>940</u>	<u>1,138</u>	<u>4,465</u>	<u>1,331</u>	<u>5,709</u>
Total Children 0-12 years	6,259	2,342	9,915	3,236	4,429	20,262	6,011	25,964
Percent Distribution	3.0%	1.1%	4.8%	1.6%	2.1%	9.7%	2.9%	12.5%
Percent of Population by Age (1)								
0-35 Months	3.0%	1.7%	4.5%	2.4%	3.1%	4.6%	3.2%	4.4%
3-4 years	2.3%	2.1%	3.5%	2.5%	2.3%	3.7%	2.6%	3.3%
5-9 years	5.1%	5.6%	7.8%	7.2%	4.8%	7.3%	5.2%	6.5%
10-12 years	<u>3.2%</u>	<u>3.9%</u>	<u>5.4%</u>	<u>5.0%</u>	<u>3.5%</u>	<u>4.4%</u>	<u>3.1%</u>	<u>4.0%</u>
Total Children 0-12 years	13.7%	13.3%	21.1%	17.1%	13.7%	19.9%	14.0%	18.2%
Labor Force Participation Rates (2)								
With children under 6 years	66%	63%	72%	44%	62%	66%	61%	66%
With children 6-17 years	71%	62%	77%	53%	74%	65%	66%	67%
Households (1)	17,748	6,032	14,274	6,996	11,218	30,688	17,692	49,170
Percent Distribution	4%	1%	3%	2%	3%	7%	4%	12%
Employment (1)	24,496	5,496	5,786	6,486	8,838	19,648	23,304	42,742
Percent Distribution	6%	1%	1%	2%	2%	5%	5%	10%

(1) Based on ABAG Projections 2013, and children as % of population based on the breakdown from the U.S. Census 2010.

(2) Based on age as percentage of population for the U.S. Census 2010. Preschool includes 25% of 5 year olds and School Age includes 75% of 5 year olds.

(3) Rural East Contra Costa County Population by Age and LFPR is based on an average of the percentages for Oakley and Clayton.

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Sources: ABAG Projections 2013; American Community Survey 2015; U.S. Census 2010; Brion Economics, Inc.

Continued

Table 49

Demographic Forecast by Area in 2027

Continued

Contra Costa County Child Care Needs Assessment 2017

City/Area	2027	2027	2027	2027	2027	2027	2027	2027
	San Pablo	San Ramon	Walnut Creek	Alamo-Blackhawk	Rodeo-Crockett	Rural East C.C. County (3)	Remainder (4)	Total County or Average
Population (1,2)	37,600	81,660	92,680	26,020	12,480	20,880	4,500	1,193,320
Percent Distribution	3%	7%	8%	2%	1%	2%	0%	100%
Population by Age (1)								
0-35 Months	1,841	3,575	2,194	525	396	711	143	44,327
3-4 years	1,421	3,275	1,818	555	330	602	119	36,125
5-9 years	2,841	7,148	4,028	1,672	699	1,499	252	77,958
10-12 years	<u>1,677</u>	<u>4,095</u>	<u>2,628</u>	<u>1,387</u>	<u>474</u>	<u>1,062</u>	<u>171</u>	<u>49,987</u>
Total Children 0-12 years	7,781	18,094	10,668	4,139	1,899	3,874	685	208,397
Percent Distribution	3.7%	8.7%	5.1%	2.0%	0.9%	1.9%	0.3%	100.0%
Percent of Population by Age (1)								
0-35 Months	4.9%	4.4%	2.4%	2.0%	3.2%	3.4%	3.2%	3.7%
3-4 years	3.8%	4.0%	2.0%	2.1%	2.6%	2.9%	2.6%	3.0%
5-9 years	7.6%	8.8%	4.3%	6.4%	5.6%	7.2%	5.6%	6.5%
10-12 years	<u>4.5%</u>	<u>5.0%</u>	<u>2.8%</u>	<u>5.3%</u>	<u>3.8%</u>	<u>5.1%</u>	<u>3.8%</u>	<u>4.2%</u>
Total Children 0-12 years	20.7%	22.2%	11.5%	15.9%	15.2%	18.6%	15.2%	17.4%
Labor Force Participation Rates (2)								
With children under 6 years	63%	62%	71%	37%	62%	75%	75%	64%
With children 6-17 years	68%	63%	70%	48%	77%	71%	71%	67%
Households (1)	11,244	28,630	43,196	9,152	4,584	7,472	1,640	422,704
Percent Distribution	3%	7%	10%	2%	1%	2%	0%	100%
Employment (1)	9,014	53,752	65,650	9,114	2,624	4,130	1,082	425,128
Percent Distribution	2%	13%	15%	2%	1%	1%	0%	100%

(1) Based on ABAG Projections 2013, and children as % of population based on the breakdown from the U.S. Census 2010.

(2) Based on age as percentage of population for the U.S. Census 2010. Preschool includes 25% of 5 year olds and School Age includes 75% of 5 year olds.

(3) Rural East Contra Costa County Population by Age and LFPR is based on an average of the percentages for Oakley and Clayton.

(4) LFPR for Remainder are same as for Rural East County as these rates are not available for a "remainder" area.

Sources: ABAG Projections 2013; American Community Survey 2015; U.S. Census 2010; Brion Economics, Inc.

Table 50
Child Care Supply by Type and Age 2017
Contra Costa County Child Care Needs Assessment 2017

City/Area	Small Family Child Care Homes (1)				
	Total Number of Facilities or Providers	Birth to 24 months or Infant	2 to 5 Years or Preschool	6 to 13 Years or School Age	Total Spaces
Antioch	71	142	284	142	568
Brentwood	38	76	152	76	304
Clayton	1	2	4	2	8
Concord	80	160	320	160	640
Danville	11	22	44	22	88
El Cerrito (2)	10	20	40	20	80
Hercules	6	12	24	12	48
Lafayette	1	2	4	2	8
Martinez	13	26	52	26	104
Moraga	4	8	16	8	32
Oakley	37	74	148	74	296
Orinda	4	8	16	8	32
Pinole	5	10	20	10	40
Pittsburg (2)	42	84	168	84	336
Pleasant Hill (2)	20	40	80	40	160
Richmond (2)	59	118	236	118	472
San Pablo	12	24	48	24	96
San Ramon	50	100	200	100	400
Walnut Creek	14	28	56	28	112
Alamo-Blackhawk	2	4	8	4	16
Rodeo-Crockett	3	6	12	6	24
Rural East County (2)	8	16	32	16	64
TOTAL	491	982	1,964	982	3,928

(1) Breakdown of spaces by age for FCCHs is based on California state licensing requirements.

(2) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: CocoKids (formerly Contra Costa Child Care Council); Brion Economics, Inc.

Continued

Table 50**Child Care Supply by Type and Age 2017**

Continued

Contra Costa County Child Care Needs Assessment 2017

City/Area	Large Family Child Care Homes (1)				
	Total Number of Facilities or Providers	Birth to 24 months or Infant	2 to 5 Years or Preschool	6 to 13 Years or School Age	Total Spaces
Antioch	39	117	234	195	546
Brentwood	17	51	102	85	238
Clayton	3	9	18	15	42
Concord	34	103	206	165	474
Danville	3	9	18	15	42
El Cerrito (2)	23	71	142	105	318
Hercules	14	43	86	65	194
Lafayette	2	6	12	10	28
Martinez	6	18	36	30	84
Moraga	0	0	0	0	0
Oakley	17	51	102	85	238
Orinda	2	6	12	10	28
Pinole	8	24	48	40	112
Pittsburg (2)	21	63	126	105	294
Pleasant Hill (2)	16	48	96	80	224
Richmond (2)	52	158	316	250	724
San Pablo	30	30	60	50	140
San Ramon	19	63	126	65	254
Walnut Creek	21	63	126	105	294
Alamo-Blackhawk	2	6	12	10	28
Rodeo-Crockett	2	6	12	10	28
Rural East County (2)	2	6	12	10	28
TOTAL	333	951	1,902	1,505	4,358

(1) Breakdown of spaces by age for FCCHs is based on California state licensing requirements.

(2) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: CocoKids (formerly Contra Costa Child Care Council); Brion Economics, Inc.

Continued

Table 50**Child Care Supply by Type and Age 2017**

Continued

Contra Costa County Child Care Needs Assessment 2017

City/Area	Child Care Centers				
	Total Number of Facilities or Providers	Birth to 24 months or Infant	2 to 5 Years or Preschool	6 to 13 Years or School Age	Total Spaces
Antioch	16	95	993	182	1,270
Brentwood	27	113	929	545	1,587
Clayton	3	16	208	203	427
Concord	43	167	1,912	1,126	3,205
Danville	21	36	674	809	1,519
El Cerrito (2)	16	17	668	114	799
Hercules	4	0	55	288	343
Lafayette	14	78	652	312	1,042
Martinez	16	133	569	578	1,280
Moraga	7	24	542	0	566
Oakley	7	0	277	26	303
Orinda	6	0	315	0	315
Pinole	6	0	119	153	272
Pittsburg (2)	26	92	1,599	198	1,889
Pleasant Hill (2)	18	84	612	518	1,214
Richmond (2)	37	331	1,696	248	2,275
San Pablo	11	79	320	242	641
San Ramon	22	57	900	1,377	2,334
Walnut Creek	33	61	1,281	1,196	2,538
Alamo-Blackhawk	7	0	237	140	377
Rodeo-Crockett	6	76	213	20	309
Rural East County (2)	2	0	90	0	90
TOTAL	348	1,459	14,861	8,275	24,595

(1) Breakdown of spaces by age for FCCHs is based on California state licensing requirements.

(2) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: CocoKids (formerly Contra Costa Child Care Council); Brion Economics, Inc.

Continued

Table 50**Child Care Supply by Type and Age 2017**

Continued

Contra Costa County Child Care Needs Assessment 2017

City/Area	License Exempt Centers				
	Total Number of Facilities or Providers	Birth to 24 months or Infant	2 to 5 Years or Preschool	6 to 13 Years or School Age	Total Spaces
Antioch	7	0	24	600	624
Brentwood	1	0	0	100	100
Clayton	0	0	0	0	0
Concord	13	0	304	1,062	1,366
Danville	0	0	0	0	0
El Cerrito (2)	0	0	0	100	100
Hercules	1	0	0	64	64
Lafayette	1	6	6	0	12
Martinez	3	0	24	150	174
Moraga	2	0	0	200	200
Oakley	1	0	0	100	100
Orinda	1	0	0	120	120
Pinole	0	0	0	0	0
Pittsburg (2)	12	0	0	1,179	1,179
Pleasant Hill (2)	3	0	0	345	345
Richmond (2)	15	0	0	1,506	1,506
San Pablo	7	0	0	705	705
San Ramon	0	0	0	0	0
Walnut Creek	2	0	0	100	100
Alamo-Blackhawk	0	0	0	0	0
Rodeo-Crockett	0	0	0	0	0
Rural East County (2)	2	0	0	200	200
TOTAL	71	6	358	6,531	6,895

(1) Breakdown of spaces by age for FCCHs is based on California state licensing requirements.

(2) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.

Sources: CocoKids (formerly Contra Costa Child Care Council); Brion Economics, Inc.

Continued

Table 50**Child Care Supply by Type and Age 2017**

Continued

Contra Costa County Child Care Needs Assessment 2017

City/Area	Total FCCHs and Centers in Contra Costa County				
	Total Number of Facilities or Providers	Birth to 24 months or Infant	2 to 5 Years or Preschool	6 to 13 Years or School Age	Total Spaces
Antioch	133	354	1,535	1,119	3,008
Brentwood	83	240	1,183	806	2,229
Clayton	7	27	230	220	477
Concord	170	430	2,742	2,513	5,685
Danville	35	67	736	846	1,649
El Cerrito (2)	49	108	850	339	1,297
Hercules	25	55	165	429	649
Lafayette	18	92	674	324	1,090
Martinez	38	177	681	784	1,642
Moraga	13	32	558	208	798
Oakley	62	125	527	285	937
Orinda	13	14	343	138	495
Pinole	19	34	187	203	424
Pittsburg (2)	101	239	1,893	1,566	3,698
Pleasant Hill (2)	57	172	788	983	1,943
Richmond (2)	163	607	2,248	2,122	4,977
San Pablo	60	133	428	1,021	1,582
San Ramon	91	220	1,226	1,542	2,988
Walnut Creek	70	152	1,463	1,429	3,044
Alamo-Blackhawk	11	10	257	154	421
Rodeo-Crockett	11	88	237	36	361
Rural East County (2)	14	22	134	226	382
TOTAL	1,243	3,398	19,085	17,293	39,776

- (1) Breakdown of spaces by age for FCCHs is based on California state licensing requirements.
- (2) El Cerrito includes data for the unincorporated area of Kensington; Pittsburg includes data for unincorporated area of Bay Point; Pleasant Hill includes data for unincorporated area of Pacheco; Richmond includes data for unincorporated area of El Sobrante; Rural East County includes Discovery Bay.
- Sources: CocoKids (formerly Contra Costa Child Care Council); Brion Economics, Inc.

APPENDIX B:

NEEDS ASSESSMENT CALIFORNIA STATE FORM

County: Contra Costa	County Code:	Date Submitted:
Contact:	Phone:	Email:

DEMOGRAPHICS

Section 1: Number of Children in the County by Age Cohorts			Section 2: Percent of Children K-12 by Race/Ethnicity		Section 3: Child Population (grades K-12) by Threshold Lanaguages		
Ages	1a. Number	Age Totals	Ethnicity	%	Language	3a. Number	3b. %
<1	13,363	1.b 0-2 yr olds:	Hispanic or Latino	35.0%	Spanish	40,678	22.93%
1	13,560		American Indian or Alaskan Native	0.3%	Vietnamese	1,133	0.64%
2	14,553	41,476	Asian American	12.5%	Cantonese	1,211	0.68%
3	15,222		1.c 3 & 4 yr olds:	Pacific Islander	0.6%	Filipino	2,306
4	14,826	33,857	Filipino	4.2%	Korean	943	0.53%
5	15,232	1.d 5-12 yr olds:	African American	9.3%	Mandarin	2,040	1.15%
6-12	108,761		120,185	White, Not Hispanic	31.7%	Arabic	1,032
Total:	195,517		Multiracial/ethnic	5.4%	Farsi	1,167	0.66%
			Not reported	1.0%	Other	10,047	NA

Section 1 Source: ABAG; U.S. Census 2010: American Community Survey.

25% of 5 year olds are counted as Preschool, the remaining 75% are included in School Age.

Section 2 Source: CA Dept of Education 2016-17.

Section 3 Source: CA Dept of Education Dataquest Report 2016-17 for Contra Costa County.

SPECIAL NEEDS

Section 4: Number of Children Who Have an Individualized Family Services Plan (IFSP) or an Individualized Education Plan (IEP) by Age Group			Section 5: Number of Children Served in child Protective Services	
Age Group	4a. with IFSP	4b. with IEP	5a. In the CPS Sytem by Age Group	5b. Referred for Child Care by Age Group
0-2	860		n/a	n/a
3 & 4		1,700	n/a	n/a
5-12		n/a	n/a	n/a

Section 4 Sources: Care Parent Network.

Section 5 Sources: County Child Welfare Department.

INCOME

Section 6: Number of Children in Families Receiving CalWORKs by Age and Stage			
Age Group	Stage 1	Stage 2	Stage 3
0-2	322	291	117
3 & 4	288	333	210
5-12	366	428	658

Section 7: Estimated Number of Children by Income Category, by Age			
Age Group	7.a At or Below Federal Poverty (Eligible for Head Start)	7.b At or below 70% State median income (Eligible for State Subsidy)	Above 70% SMI
0-2	5,599	15,396	26,080
3 & 4	4,571	12,744	21,113
5-12	15,143	44,264	75,921

Section 8: Number of Children in Migrant Families (50% or more of income is from Migrant Work)		
Children in Migrant Families 0-12	4	

Section 6 Source: CalWORKs Stage 1 data provided by Contra Costa County - Employment & Human Services Dept, June 2018.

3-4 year olds may include some 5 year olds in the only data available.

Data on CalWORKs Stage 2 and 3 provide by Margaret Weigart-Jacobs, CocoKids, 2017.

Section 7 Source: American Community Survey 5-Year Estimates 2016;

Early Learning Needs Assessment Tool compiled by American Institutes for Research.

Section 8 Source: Manuel Nunez, Director II, Migrant Education, San Joaquin County Office of Education, 2018.

DEMAND FOR CHILD CARE AND DEVELOPMENT SERVICES

Demand Populations	Ages 0-2	Ages 3 and 4 yr olds	Ages 5-12 yr olds
Section 9: Number of Children in families with working parents who are at or below 70% SMI	15,396	12,744	44,264
Section 10: Number of children with all parents in the workforce (all income levels)	26,599	21,713	80,698
Section 11: Number of 3 & 4 yr olds with at least 1 non-working parent (all income levels)		12,144	
Section 12: Number of 3 & 4 yr olds with at least 1 non-working parent in family at or below 70% SMI		4,571	

Section 9-12 Source: ABAG; American Community Survey 5-Year Estimates 2016.

CAPACITY			
Section 13: Licensed Capcity for Age Groups			
Spaces	13a. Infants (0-2)	13.b Preschool (3 & 4)	13.c School-Age (5-12)
Licensed Centers	1,459	14,861	8,275
Licensed Family Child Care Homes*	1,933	3,866	2,487
License-Exempt Centers**	6	358	6,531

*Assumes 8 licensed spaces for small FCCHs and 14 spaces for large FCCHs.

** Number of spaces in License -exempt are self-reported or estimated based on licensing capacity.

Section 13 Sources: CocoKids.

COST OF CARE: COUNTY REGIONAL MARKET RATES ALLOWED FOR STATE SUBSIDY				
Section 14: Weekly Regional Market Rates by Age and Type of Care				
Center Regional Market Rates	Center Full-time Maximum	Center Full-Time Average	Center Part-Time Maximum	Center Part -Time Average
Infant/Toddlers	\$416	\$288	\$310	n/a
Preschool	\$338	\$210	\$261	n/a
School-Age	\$216	n/a	\$142	n/a
Family Child Care Home Regional Market Rates	FCCH Full-time Maximum	FCCH Full-Time Average	FCCH Part-Time Maximum	FCCH Part -Time Average
Infant/Toddlers	\$252	\$190	\$195	n/a
Preschool	\$229	\$174	\$179	n/a
School-Age	\$171	n/a	\$138	n/a

Section 14 Source: California Department of Education; California Child Care Resource & Referral Network.

CHILDREN ENROLLED IN STATE AND FEDERALCHILD CARE AND DEVELOPMENT SUBSIDY PROGRAMS			
Section 15: Children served in Subsidized Child Care and Development Subsidy Programs (point in time)			
Funding /Program Type	Infant Toddlers (0-2)	Preschool (3 & 4 yr olds)	School-Age (5-12)
Full-Day Center (CCTR)	387	36	288
CA State Preschool (CSPP) Full-day	na	1,359	65
CA State Preschool (CSPP) Part-day	na	na	na
FCCH Networks	0	1	2
Migrant	0	0	0
Handicap Program	0	0	0
Alternative Payment (voucher)	142	160	67
CalWORKs Stage 1	322	288	366
CalWORKs Stage 2	291	333	428
CalWORKs Stage 3	117	210	658
Head Start	na	1,380	na
Early Head Start	573	na	na
Other (ASES and other after-school license-exempt)			6,531

Section 15 Sources: American Institutes for Research Early Learning Needs Assessment Tool for 2016;

Head Start, Early Head Start, and CalWORKs Stages 1, 2 and 3 data provided by Margaret Weigart Jacobs, CocoKids.

UNMET NEED					
Section 16: County Unmet Need By Type of Care and Age Group					
Type of care needed	Infant Toddler (0-2)		Preschool (3 & 4)		School-Age 5-12
	Number	%	Number	%	Number
16a. Full-time care for working parents	9,970	37%	2,654	12%	22,741
16b. Full-time care for working familes eligible for State subsidy	15,396	100%	12,744	100%	44,264
16c. Part time Preschool for enrichment / school readiness (all incomes)			8,377	69%	
16d. Part time Preschool for enrichment/ school readiness and eligible for state subsidy			4,571	100%	

Section 16 Source: Calculation from data above.

Prepared by Brion Economics, Inc.

APPENDIX C:

CENTER DIRECTOR PROVIDER SURVEY AND FAMILY CHILD CARE PROVIDER SURVEY IN ENGLISH AND SPANISH

Introduction

Thank you for taking our survey.

Child care is so important. We want to be sure that it is available here in Contra Costa County for all the families that will need it, now and in the future.

We are doing a study to help us plan. We have hired an independent research firm, Brion Economics, Inc., who has designed this survey.

The survey asks for specifics about your program enrollments and site facility. What you tell us will be available only to child care planning staff and the research consultant team. The consultants will summarize all the responses and create a public report with trends by city and program type.

Your experience as a provider is critical! This survey should take no more than 15 minutes to complete. All those who complete the survey will be entered into a raffle for \$1000 in prizes (\$300, \$200, \$100 or \$50 gift certificate for educational supplies).

Please do your best to answer all of the questions. If you have any questions regarding this survey, please contact Cesca Wright at 530.220.4049 or cesca@davisconsultants.net.

Thank you for all you do for children and families in our community.

Ruth Fernández, Manager, Educational Services, Contra Costa County Office of Education and LPC Coordinator

Margaret Wiegert-Jacobs, Director of the Learning Institute and Resource and Referral Department, CocoKids

Have we got the right person?

* 1. Are you the person from your organization or business who is most knowledgeable about the child care facility and current enrollments?

☐ Yes

☐ No

Then who?

2. Please provide the name, email and phone number of the person who is most knowledgeable about your facilities.

Name

Email address

Phone number

* 3. Choose the next page for exiting the survey.

- ☐ I'd like to leave a comment for the agencies studying the supply and demand for child care facilities in Contra Costa County
- ☐ I'd like to exit without leaving a comment.

Single or Multiple Locations

* 4. Does your program manage only one or multiple child care center locations at this time?

- ☐ One location
- ☐ Multiple locations

For Administrators of Multiple Sites

We will be asking questions about each site. Kindly provide the contact information for each site director. If this is challenging, please call or email Cesca Wright so we can find a better solution. cesca@davisconsultants.net or 530.220.4049.

5. Please list your sites, the name of the site director and her/his email.

1st site name and city	
1st Site Director's Name	
1st Site Director's Email	
2nd Site name and city	
2nd Site Director's Name	
2nd Site name and city	
3rd site name and city	
3rd Site Director's Name	
3rd Site Director's Email	
4th site name and city	
4th Site Director's Name	
4th Site Director's Email	
5th site name and city	
5th Site Director's Name	
5th Site Director's Email	
6th site name and city	
6th Site Director's Name	
6th Site Director's Email	
7th site name and city	
7th Site Director's Name	
7th Site Director's Email	
8th site name and city	

8th Site Director's Name

8th Site Director's Email

9th site name and city

9th Site Director's Name

9th Site Director's Email

10th site name and city

10th Site Director's Name

10th Site Director's Email

* 6. Are you a site director as well?

☐ Yes

☐ No

Verification of Site

* 7. What do you call your child care program?

Center or program name

8. In what city are you located?

- | | | |
|----------------------------------|---------------------------------|---|
| ☐ Antioch | ☐ Lafayette | ☐ Pleasant Hill |
| ☐ Brentwood | ☐ Martinez | ☐ Richmond |
| ☐ Clayton | ☐ Moraga | ☐ San Pablo |
| ☐ Concord | ☐ Oakley | ☐ Walnut Creek |
| ☐ Danville | ☐ Orinda | ☐ Unincorporated County |
| ☐ El Cerrito | ☐ Pinole | ☐ My center is not located in Contra Costa County |
| ☐ Hercules | ☐ Pittsburg | |

9. Please check all the building types which apply to your facility.

- ☐ Converted Residential Building
- ☐ City Owned Building
- ☐ School District Building
- ☐ Converted Commercial Building
- ☐ Modular Building
- ☐ Building Constructed Specifically for Child Care
- ☐ Faith-based campus (Church, Mosque, Synagogue, Temple, etc.)
- ☐ Other (please specify)

10. Approximately, for how many years has this program been operating at this location?

11. Has your program participated in Quality Matters (QRIS) or the Contra Costa Countywide Professional Development Program (PDP)?

☐ Yes

☐ No

Enrollments

12. What are your current enrollment numbers?

Infant/Toddlers (ages 0-24 months)

Preschool Children (ages 2-4 years)

School-Aged Children (5 years and older)

13. How well are you meeting your target enrollment for each of the following?

	ON TARGET (We are at our target capacity.)	CLOSE to TARGET (We are within 90% of our target capacity.)	BELOW TARGET (We are below 90% of our target capacity.)	NOT APPLICABLE (We do not offer this.)
Full-time infant/toddler spaces	☐	☐	☐	☐
Part-time infant/toddler spaces	☐	☐	☐	☐
Full-time preschool spaces	☐	☐	☐	☐
Part-time preschool spaces	☐	☐	☐	☐
Before-school spaces	☐	☐	☐	☐
After-school spaces	☐	☐	☐	☐

* 14. Does your program have a wait list?

☐ Yes

☐ No

Waitlist

15. Approximately, how many children are on your wait list?

Infant/Toddler (0-24
months)

Preschool (ages 2-5
years)

School Aged (over 5
years of age)

Growing Programs

* 16. Have you expanded the number of child care spaces at your center in the past 5 years?

☐ Yes

☐ No

Cost of Expansion

17. How many more childcare spaces did you add, by age group?

Infant/Toddlers (ages 0-24 months)

Preschool (ages 2-4 years)

Before/After School (ages 5 years and older)

18. Approximately how much did the following components of the expansion cost?

Permitting & Licensing Fees

Construction Costs

Furniture and Equipment

Other costs (please explain in text box below)

19. Please explain any additional expansion costs.

20. Please check all of the planning processes you went through.

- ☐ Building Permit
- ☐ Use Permit
- ☐ Zoning or General Plan Change
- ☐ Public Hearings
- ☐ Other (please specify)

21. Did you face any challenges to expansion? Please describe below.

Publicly Subsidized?

* 22. Does your program receive funding from any public sources, such as State Preschool, Head Start/Early Start, ASES, 21st Century, or have children enrolled who receive subsidies from Coco Kids or Contra Costa County?

☐ Yes

☐ No

For Programs with Public Funding

23. Approximately how many spaces are funded by each of these programs?

State Preschool

Head Start/Early Head
Start

After School Education &
Safety Program (ASES)

21st Century

Coco Kids or Contra Costa
County

OTHER

24. What percent of your subsidized spaces are filled?

25. Do current reimbursement rates cover the costs per space?

☐ Yes

☐ No

26. How do you cover the costs not reimbursed?

Size and Ownership Status

Please answer these to the best of your ability. It is not a test!

27. What is the gross square footage of the child care facility? *(This is the square footage of the building or portion of the building/s used for the program. It does not include outside play space. This information can be found on your center license.)*

* 28. Does your organization own the building that houses the program?

☐ Yes

☐ No

Rented Facilities

Your responses will be seen by Brion Economics. They will NOT be shared in any public document.

29. What sort of rental agreement do you have?

- ☐ Month to month
- ☐ Fixed term lease
- ☐ Other (please specify)

30. What is the monthly rent or occupancy costs/charges? *(If you don't know, but can name someone who does, kindly provide their contact information.)*

31. When does the lease expire?

32. Do you anticipate any problems renewing your lease or continuing to rent this space?

- ☐ We plan to renew and don't anticipate problems.
- ☐ We may have issues renewing.
- ☐ Our lease will not be renewed and we know we have to relocate.

If you anticipate issues, please explain.

Renovations Underway?

33. Do you currently have any significant repairs or renovations underway at this location?

- ☐ No
- ☐ Yes (please describe below)

Please describe renovations underway.

* 34. Have you received bids or estimates for repairs or renovations that have not yet been pursued?

- ☐ No
- ☐ Yes (Please describe below)

Please itemize the repairs or renovations you have considered.

Barriers to Repairs or Renovation

35. Is anything stopping you from making the repairs or renovations you have considered? *(Please check all that apply.)*

- ☐ We don't have any barriers and will be proceeding
- ☐ No longer a priority
- ☐ The costs were too high
- ☐ Lacked owner's approval
- ☐ Lacked time and/or expertise to manage the project
- ☐ Did not want to tackle the city permitting process
- ☐ Did not have the funds
- ☐ License issues

IF there were other reasons, please explain.

Contra Costa County Child Care Center Director Survey

Current Facility Condition

36. Please rate the current condition of the following components of the child care facility.

	URGENT (has safety issues that could jeopardize license renewal)	Due for REPAIR/RENOVATION soon	ADEQUATE (showing some wear and tear but remains safe and usable)	GOOD or EXCELLENT	Not Applicable or Unknown
Exterior (stucco/siding, parking, exterior lighting)	☐	☐	☐	☐	☐
Building Structure (foundation, framing, roof)	☐	☐	☐	☐	☐
Interior Finishes (lighting, floor coverings, painting)	☐	☐	☐	☐	☐
ADA Accessibility	☐	☐	☐	☐	☐
Fire/Earthquake Safety	☐	☐	☐	☐	☐
Other Functions (plumbing, electrical, kitchen, heating, air conditioning)	☐	☐	☐	☐	☐

37. Please explain any items ranked "Urgent" or "Inadequate".

38. Please rate the current condition of these aspects of the facility.

	URGENT (has safety issues that could jeopardize license renewal)	Due for REPAIR/RENOVATION Soon	ADEQUATE (showing some wear, but remains safe and usable)	GOOD or Excellent Condition
Exterior lighting	☐	☐	☐	☐
Interior walls/paint	☐	☐	☐	☐
Interior lighting	☐	☐	☐	☐
Floor coverings	☐	☐	☐	☐
Play structures	☐	☐	☐	☐

39. Please explain any items ranked "Urgent" or "Due for Repair" responses.

--

Expansion Possibilities

* 40. Would you or **your organization/business** consider expanding to serve more children in Contra Costa County **at this or another location**? *(Note: this question is not limited to the site you have been describing in previous responses.)*

- ☐ Yes, we would like to expand
- ☐ We might consider expansion
- ☐ No, we are not interested in expansion

For those considering expansion

41. Please check all the types of spaces you would consider.

- ☐ Part time
- ☐ Full time
- ☐ Mixed, full and part time

42. How many additional spaces would you like to add?

Infant/Toddler (0-24
months)

Preschool (2-5 years)

School-Aged (over 5
years)

43. By when might you expand?

- ☐ Within a year
- ☐ In 1-2 years
- ☐ In 2-5 years
- ☐ Not sure

44. Do you anticipate any of the following challenges for expansion or opening a new site? *(Please check all that apply.)*

- ☐ We don't anticipate any challenges or barriers and will be proceeding.
- ☐ Difficulty finding an available site
- ☐ Lack owner's approval for renovations
- ☐ Lack time and/or expertise to manage an expansion project
- ☐ Don't want to tackle the city permitting process
- ☐ Lack of funding for expansion
- ☐ Licensing issues
- ☐ State reimbursement rate insufficient to cover costs
- ☐ Lack of availability of qualified staff for expansion
- ☐ Lack of subsidized funding
- ☐ Other challenges or barriers (please specify)

45. May we include the name of your organization or center site in a public list as one that is interested in expansion?

- ☐ Yes
- ☐ No

If yes, how would you like it listed? (list the site or agency name.)

Opportunities

* 46. 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? If you are currently working at acquiring this site, please note that in the comment notes, and we will not disclose that location.

☐ Yes (please describe below)

☐ No

Please describe the potential space/s you have in mind, and any contact information if available. Please note if your program is pursuing this space.

Anything else?

47. Do you have anything else you would like to tell us as we consider ways to ensure the adequate supply of child care facilities in Contra Costa County for the years to come?

48. 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.

Name

Email address

Thank you for assisting us in planning for long-term availability of local child care facilities.

Family Child Care Provider Survey

Introduction

Thank you for taking our survey.

Child care is so important. We want to be sure that it is available here in Contra Costa County for all the families that will need it, now and in the future.

We are doing a study to help us plan. We have hired an independent research firm, Brion Economics, Inc., who has designed this survey.

The survey asks for specifics about your program. What you tell us will be available only to child care planning staff and the research consultant team. The consultants will summarize all the responses and create a public report with trends by city and program type.

Your experience as a provider is critical! This survey should take no more than 15 minutes to complete. All those who complete the survey will be entered into a raffle for \$750 in prizes (\$300, \$200, \$100 or \$50 gift certificate for educational supplies).

Please do your best to answer all of the questions. If you have any questions regarding this survey, please contact Cesca Wright at 530.220.4049 or cesca@davisconsultants.net.

Thank you for all you do for children and families in our community.

Ruth Fernández, Manager, Educational Services - Contra Costa County Office of Education and LPC Coordinator

Margaret Wiegert-Jacobs, Director of the Learning Institute and Resource and Referral Department, CocoKids

Family Child Care Provider Survey

The Site

* 1. What do you call your Family Child Care program?

Name

2. For how many years have you had a licensed Family Child Care Home?(If you are newly licensed please enter "1".)

3. In what city are you currently located?

- | | | |
|----------------------------------|---------------------------------|---|
| ☐ Antioch | ☐ Lafayette | ☐ Pleasant Hill |
| ☐ Brentwood | ☐ Martinez | ☐ Richmond |
| ☐ Clayton | ☐ Moraga | ☐ San Pablo |
| ☐ Concord | ☐ Oakley | ☐ Walnut Creek |
| ☐ Danville | ☐ Orinda | ☐ Unincorporated County |
| ☐ El Cerrito | ☐ Pinole | ☐ My family child care home is not located in Contra Costa County |
| ☐ Hercules | ☐ Pittsburg | |

4. Approximately, for how many years has this program been operating at this location?(If you are a new center, please enter "1")

5. Have you participated in Quality Matters (QRIS) or the Contra Costa Countywide Development Program (PDP)?

- ☐ Yes
- ☐ No

Family Child Care Provider Survey

Enrollments

6. What are your current enrollment numbers?

Infant/Toddlers (ages 0-24 months)

Preschool Children (ages 2-4 years)

School-Aged Children (5 years and older)

7. How well are you meeting your target enrollment for each of the following?

	ON TARGET (<i>I am at my target capacity.</i>)	CLOSE to TARGET	BELOW TARGET (<i>I am wanting more children in this age group</i>)	NOT APPLICABLE (<i>We do not offer this.</i>)
Full-time infant/toddler spaces	☐	☐	☐	☐
Part-time infant/toddler spaces	☐	☐	☐	☐
Full-time preschool spaces	☐	☐	☐	☐
Part-time preschool spaces	☐	☐	☐	☐
Before-school spaces	☐	☐	☐	☐
After-school spaces	☐	☐	☐	☐

* 8. Do you have a wait list?

☐ Yes

☐ No

Family Child Care Provider Survey

Waitlist & Ownership Status

9. Approximately, how many children are on your wait list?

Infant/Toddler (0-24
months)

Preschool (ages 2-5
years)

School Aged (over 5
years of age)

* 10. Do you own or rent your family care home?

☐ Own

☐ Rent

Family Child Care Provider Survey

Rented Facilities

Let us remind you again that your responses will be seen by Brion Economics and the COCO Kids staff administering this study. They will NOT be shared in any public document.

11. What sort of rental agreement do you have?

- ☐ Month to month
- ☐ Fixed term lease
- ☐ Other (please specify)

12. What is the monthly rent or occupancy costs/charges?

13. When does the lease expire?

14. Do you anticipate any problems renewing your lease or continuing to rent this space?

- ☐ I don't anticipate problems.
- ☐ I may have issues renewing.
- ☐ I know I will have to relocate.

If you anticipate issues, please explain.

15. Approximately what percent of the home is used by the child care program?

- ☐ 30%
- ☐ 40%
- ☐ 50%
- ☐ 60%
- ☐ 70%
- ☐ 80%
- ☐ 90%
- ☐ 100%

Renovations Underway?

16. Do you currently have any significant repairs or renovations underway to improve your home for the child care program?

- ☐ No
- ☐ Yes (please describe below)

Please describe renovations underway.

* 17. Have you received bids/estimates for repairs/renovations to improve the space for child care that have not been pursued?

- ☐ No
- ☐ Yes (Please describe below)

Please itemize the repairs or renovations you have considered.

Barriers to Repairs or Renovation

18. Has anything stopped you from making the repairs or renovations you have considered? *(Please check all that apply.)*

- ☐ We don't have any barriers and will be proceeding
- ☐ No longer a priority
- ☐ The costs were too high
- ☐ Lacked owner's approval
- ☐ Lacked time and/or expertise to manage the project
- ☐ Did not want to tackle the city permitting process
- ☐ Did not have the funds
- ☐ License issues

IF there were other reasons, please explain.

Family Child Care Provider Survey

Expansion Possibilities

* 19. Are you licensed as a Large Family Child Care Home?

☐ Yes

☐ No

* 20. Would you consider expanding to serve more children in Contra Costa County **at this** or **another location**?

☐ Yes, I would like to expand

☐ I might consider expansion

☐ No, I am not interested in expansion

Family Child Care Provider Survey

For those considering expansion

21. Please check all the types of spaces you would consider.

- ☐ Part time
- ☐ Full time
- ☐ Mixed, full and part time

22. How many additional spaces would you like to add?

Infant/Toddler (0-24
months)

Preschool (2-5 years)

School-Aged (over 5
years)

23. By when might you expand?

- ☐ Within a year
- ☐ In 1-2 years
- ☐ In 2-5 years
- ☐ Not sure

24. Do you anticipate any of the following challenges for expansion or opening a new site? *(Please check all that apply.)*

- ☐ We don't anticipate any challenges or barriers and will be proceeding.
- ☐ Difficulty finding an available site
- ☐ Lack owner's approval for renovations
- ☐ Lack time and/or expertise to manage an expansion project
- ☐ Don't want to tackle the city permitting process
- ☐ Lack of funding for expansion
- ☐ Licensing issues
- ☐ State reimbursement rate insufficient to cover costs
- ☐ Lack of availability of qualified staff for expansion
- ☐ Lack of subsidized funding
- ☐ Other challenges or barriers (please specify)

25. May we include your name in a public list of Family Care Providers with an interest in possible expansion?

- ☐ Yes
- ☐ No

If yes, how would you like it listed? (list the site or agency name.)

Opportunities

26. Do you know of any potential buildings or sites (vacant lots, buildings, shared facilities, etc.) which might be developed for child care/early learning center? If you are currently working at acquiring this site, please note that in the comment notes, and we will not disclose that location.

☐ Yes (please describe below)

☐ No

Please describe the potential space/s you have in mind, and any contact information if available. Please note if your program is pursuing this space.

Family Child Care Provider Survey

Raffle Entry

27. 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.

Name

Email address

Family Child Care Provider Survey

Anything else?

28. Do you have anything else you would like to tell us as we consider ways to ensure an adequate supply of child care facilities in Contra Costa County for the years to come?

Thank you for assisting us in planning for long-term availability of local child care facilities.

Presentación

Gracias por hacer nuestra encuesta.

El cuidado infantil es importante. Queremos asegurarnos de que esté disponible aquí en el Condado de Contra Costa para todas las familias que lo necesiten, ahora y en el futuro. Estamos realizando un estudio para ayudarnos a planificar. Hemos contratado a una firma de investigación independiente, Brion Economics, Inc., la misma que ha diseñado esta encuesta.

La encuesta pregunta de manera específica acerca de su programa. Lo que usted nos diga estará disponible solamente para el personal de planificación de cuidado infantil y para el equipo consultor de investigación. Los consultores resumirán todas las respuestas y crearán un reporte público con las tendencias de acuerdo a cada ciudad y tipo de programa.

¡Su experiencia como proveedor es muy importante! Esta encuesta debe tomar no más de 15 minutos para completarla. Todos aquellos que completen la encuesta participaran en una rifa de \$750 en premios (tarjetas de regalos para materiales educativos por valor de \$300, \$200, \$100 o \$50).

Por favor haga todo lo posible para responder a todas las preguntas. Si usted tiene alguna pregunta sobre esta encuesta, por favor póngase en contacto con Cesca Wright al 530.220.4049 o a cesca@davisconsultants.net.

Gracias por todo lo que hace por los niños y las familias de nuestra comunidad.

Ruth Fernández, Gerente, Servicios Educativos – Oficina de Educación del Condado de Contra Costa y Coordinadora LPC.

Margaret Wiegert-Jacobs, Directora del Instituto de Aprendizaje y Recursos y Departamento de Referencia, CocoKids

El Lugar

* 1. ¿Cómo llama a su programa de Cuidado Infantil Familiar?

Nombre

2. ¿Por cuántos años ha tenido usted un Hogar con licencia para Cuidado Infantil Familiar?(Si usted recién obtuvo su licencia, escriba "1".)

3. ¿En qué ciudad está actualmente ubicado?

- | | | |
|----------------------------------|---------------------------------|---|
| ☐ Antioch | ☐ Lafayette | ☐ Pleasant Hill |
| ☐ Brentwood | ☐ Martinez | ☐ Richmond |
| ☐ Clayton | ☐ Moraga | ☐ San Pablo |
| ☐ Concord | ☐ Oakley | ☐ Walnut Creek |
| ☐ Danville | ☐ Orinda | ☐ Área no incorporada del Condado |
| ☐ El Cerrito | ☐ Pinole | ☐ Mi hogar para cuidado infantil no está ubicado en el Condado de Contra Costa. |
| ☐ Hercules | ☐ Pittsburg | |

4. Aproximadamente, ¿por cuántos años ha estado este programa operando en esta ubicación?(Si es un centro nuevo, por favor escriba "1").

5. ¿Ha participado en Quality Matters (QRIS) o el Programa de Desarrollo para todo el Condado de Contra Costa (PDP)?

- ☐ Si
- ☐ No

Inscripciones

6. Actualmente, ¿cuántos tiene registrados?

Niños pequeños (edades de 0-24 meses)

Niños en edad pre-escolar (edades 2-4 años)

Niños en edad escolar (5 años o mayores)

7. ¿Qué tan bien está logrando su meta de registro por cada uno de los siguientes?

	EN LA META (estoy en mi meta en cuanto a capacidad)	EN LA META	POR DEBAJO DE LA META (quiero más niños en esta edad)	NO APLICA (No ofrecemos esto)
Espacios a tiempo completo para bebés/niños pequeños	☐	☐	☐	☐
Espacio a medio tiempo para bebés/niños pequeños	☐	☐	☐	☐
Espacios a tiempo completo para pre-escolar	☐	☐	☐	☐
Espacios a medio tiempo para pre-escolar	☐	☐	☐	☐
Espacios para antes de la escuela	☐	☐	☐	☐
Espacios para después de la escuela	☐	☐	☐	☐

* 8. ¿Tiene una lista de espera?

☐ Sí

☐ No

Lista de Espera y Estado de la Propiedad

9. Aproximadamente, ¿cuántos niños están en su lista de espera?

Bebés/niños pequeños
(0-24 meses)

Pre-escolar (edades de
2-5 años)

En edad escolar (más de
5 años de edad)

* 10. ¿Alquila o es dueño de la casa para el cuidado familiar?

☐ Propia

☐ Alquilada

Instalaciones en Alquiler

Permítanos recordarle que sus respuestas solo las verán Brion Economics y el personal de COCO Kids administrando este estudio. Sus respuestas NO serán compartidas en ningún documento público.

11. ¿Qué tipo de contrato de alquiler tiene?

- ☐ Mes a mes
- ☐ Contrato a plazo fijo
- ☐ Otro (por favor especifique)

12. Por favor ingrese un comentario.

13. ¿Cuándo termina el contrato de alquiler?

14. ¿Anticipa usted algún problema para renovar su alquiler o continuar alquilando este espacio?

- ☐ No anticipo problemas.
- ☐ Puedo tener problemas renovándolo.
- ☐ Sé que tendré que moverme

Si anticipa problemas, por favor explique.

15. Aproximadamente, ¿qué porcentaje de su casa es utilizado para el programa de cuidado infantil?

- ☐ 30%
- ☐ 40%
- ☐ 50%
- ☐ 60%
- ☐ 70%
- ☐ 80%
- ☐ 90%
- ☐ 100%

¿Renovaciones en Curso?

16. Actualmente, ¿tiene usted importantes reparaciones o renovaciones trazadas para mejorar su hogar para el programa de cuidado infantil?

- ☐ No
- ☐ Sí (por favor describa a continuación)

Por favor describa las renovaciones en curso.

* 17. ¿Ha recibido ofertas/presupuestos para las reparaciones/renovaciones para mejorar el espacio para el cuidado infantil que no han sido llevadas a cabo?

- ☐ No
- ☐ Sí (Por favor describa a continuación)

Por favor enumere las reparaciones o renovaciones que usted ha considerado.

Obstáculos para las Reparaciones/Renovaciones

18. ¿Hay algo que lo haya detenido de considerar hacer reparaciones o renovaciones?(Por favor marque todas las que aplican)

- ☐ No tenemos ningún obstáculo y vamos a proceder
- ☐ Ya no es una prioridad
- ☐ Los costos son muy altos
- ☐ No contamos con la aprobación del propietario
- ☐ Faltó tiempo y/o experiencia para manejar el proyecto
- ☐ No quería hacer frente al proceso de permiso ante la ciudad
- ☐ No tuve los fondos
- ☐ Problemas de licencia

Si hubo otras razones, por favor explique.

Posibilidades de Expansión

* 19. ¿Tiene usted licencia como un Hogar Grande para el Cuidado Infantil?

☐ Sí

☐ No

* 20. ¿Consideraría ampliar para servir a más niños en el Condado de Contra Costa en esta ubicación o en otra?

☐ Sí, me gustaría ampliar

☐ Podría considerar una ampliación

☐ No, no estoy interesado en una ampliación

Para aquellos considerando una ampliación

21. Favor de poner un número, 0 o mayor en el cuadro.

- ☐ Medio tiempo
- ☐ Tiempo completo
- ☐ Mezcla de medio y tiempo completo

22. ¿Cuántos espacios adicionales le gustaría agregar?

Bebés/niños pequeños
(de 0-24 meses)

Pre-escolar (2-5 años)

Edad escolar (más de 5 años)

23. ¿Cuándo podría usted ampliar?

- ☐ Dentro de un año
- ☐ En 1 a 2 años
- ☐ En 2 a 5 años
- ☐ No estoy seguro

24. ¿Anticipa algunos de los siguientes retos para la ampliación o inauguración de un nuevo local?(Por favor marque todos los que aplican)

- ☐ No anticipamos ningún reto u obstáculo y vamos a proceder
- ☐ Dificultad encontrando un lugar disponible
- ☐ Falta la aprobación del dueño para las renovaciones
- ☐ Falta la aprobación del dueño para las renovaciones
- ☐ No quiero hacer frente al proceso de permisos ante la ciudad
- ☐ Falta de financiamiento para la expansión
- ☐ Problemas de licencia
- ☐ State reimbursement rate insufficient to cover costs
- ☐ La tasa de reembolso del estado insuficiente para cubrir costos
- ☐ Falta de disponibilidad de personal calificado para la expansión
- ☐ Otros retos u obstáculos (por favor especificar)

25. ¿Podemos incluir su nombre en una lista pública de Proveedores de Cuidado Familiar con interés en una posible expansión?

- ☐ Sí
- ☐ No

Si contestó Sí, ¿cómo le gustaría aparecer? (mencionando el lugar o el nombre de la agencia)

Oportunidades

26. ¿Sabe de cualquier edificación potencial (lotes baldíos, edificaciones, instalaciones compartidas, etc.) que podrían desarrollarse para centro de educación temprana/cuidado infantil? Si usted está actualmente trabajando para adquirir este lugar, por favor escriba eso en los comentarios, y nosotros no divulgaremos esa ubicación.

☐ Sí (por favor describa a continuación)

☐ No

Por favor describa el(los) espacio(s) potencial(es) que usted tiene en mente y cualquier Información de contacto si estuviera disponible. Por favor anote si su programa está persiguiendo este espacio.

Ingresar su Nombre a la Rifa

27. Si usted quisiera que su nombre ingrese en la rifa para ganar tarjetas de regalos para materiales educativos, por favor escriba su nombre y dirección de correo electrónico a continuación.

Nombre

Correo Electrónico

¿Algo más?

28. ¿Tiene usted algo más que le gustaría decirnos mientras consideramos maneras para asegurar un suministro adecuado de instalaciones para el cuidado infantil en el Condado de Contra Costa para los próximos años?

Gracias por ayudarnos en la planeación para la disponibilidad a largo plazo de instalaciones locales para el cuidado infantil.

APPENDIX D:

STAKEHOLDER SURVEY

Contra Costa County Child Care Stakeholder Survey

Introduction

Child care lets families work, and helps kids learn. Contra Costa County currently has a shortage of nearly 30,000 child care spaces and the demand is growing. One of the greatest challenges to meeting the demand is finding affordable site locations.

We have hired an independent research firm, Brion Economics, to assist us in studying this acute facilities shortage. A publicly available report will summarize survey responses and other relevant research. The report will identify types of properties by city as potential facility locations. Specific properties will not be mentioned in the report, but be used internally for staff follow-up. At the end of the survey, we will ask permission to acknowledge you and/or your agency for your assistance in the study.

If you have any questions regarding this survey, you may contact Cesca Wright at 530.220.4049 or cesca@davisconsultants.net.

Thank you for all you do to make Contra Costa County a great place to live and work.

**Karen Sakata, Superintendent, Contra Costa County Office of Education
Sean Casey, Executive Director, First 5 Contra Costa**

* 1. Which sector best describes your role related to facilities, land use, or real estate in Contra Costa County? *(Please select the single best match.)*

- ☐ Faith-Based Organization
- ☐ City or Town
- ☐ Real Estate Broker, Real Estate Developer, or Non-Profit Development Organization
- ☐ Commercial Property Owner
- ☐ Other Business Operating in Contra Costa County (other than real estate related)
- ☐ Other Non-Profit or Community Service Organization
- ☐ Local School District or Community College District
- ☐ County of Contra Costa
- ☐ Other interested individual

Contra Costa County Child Care Stakeholder Survey

For Real Estate and Development Organizations

* 2. What is the name of the agency you work for?

Contra Costa County Child Care Stakeholder Survey

Real Estate Professionals Continued

3. Are you aware of any planned or under-construction development projects in Contra Costa County, California, that already include child care facilities?

☐ Yes

☐ No

If you answered yes, kindly tell us the project/s name/s and location/s.

4. Are you aware of any planned or under-construction development projects in Contra Costa County, California, that might possibly include child care facilities?

☐ Yes

☐ No

If you answered yes, kindly tell us the project/s name/s and location/s.

5. Has {{ Q2 }} ever considered including child care in a project ***but it proved too challenging?***

☐ Yes

☐ No

If you answered yes, please describe the challenges and when and where the project was developed.

* 6. To the best of your knowledge, has {{ Q2 }} ever included child care facilities in any of its residential or non-residential projects?

- ☐ Yes
- ☐ No
- ☐ I don't know

Contra Costa County Child Care Stakeholder Survey

For Developers with Experience Building Child Care Facilities

7. Please describe the location and scale of the child care facility that {{ Q2 }} developed.

8. What insights did you gain that would be helpful for those considering including child care in their development plans?

* 9. Please click below to go to the final survey page.

☐ Click here

Contra Costa County Child Care Stakeholder Survey

For other businesses, non-profits, commercial property owners and other interested individuals.

* 10. What is the name of your organization or business?

11. Does your organization own or rent facilities in Contra Costa County?

- ☐ We own all of our facilities
- ☐ We rent all of our facilities
- ☐ Some of our facilities are owned, and others are rented
- ☐ We have no facilities in Contra Costa County

12. In what cities do you have facilities? *(Please select all that apply.)*

- | | | |
|-------------------------------------|------------------------------------|--|
| ☐ Antioch | ☐ Lafayette | ☐ Pleasant Hill |
| ☐ Brentwood | ☐ Martinez | ☐ Richmond |
| ☐ Clayton | ☐ Moraga | ☐ San Pablo |
| ☐ Concord | ☐ Oakley | ☐ Walnut Creek |
| ☐ Danville | ☐ Orinda | ☐ Unincorporated Contra Costa County |
| ☐ El Cerrito | ☐ Pinole | ☐ NOT APPLICABLE, we neither rent nor own facilities in Contra Costa County |
| ☐ Hercules | ☐ Pittsburg | |

13. Approximately how many employees do you have in Contra Costa County? *(Please enter a number.)*

There are multiple ways ways to support the development of new child care spaces and facilities. They can be hosted in existing structures, in new buildings or on vacant land in modular portable buildings. The program can be managed internally or simply hosted onsite with facilities rented to an independent child care operator.

* 14. Is licensed child care currently offered in your facilities or on your grounds?

☐ Yes

☐ No

Contra Costa County Child Care Stakeholder Survey

For organizations with existing onsite child care

15. Who is eligible to utilize onsite child care spaces?

- ☐ Only employees (100%)
- ☐ Primarily employees (85-99%)
- ☐ Employees and community members
- ☐ Other (please specify)

Contra Costa County Child Care Stakeholder Survey

Other Businesses, NGOs, and Commercial Real Estate Owners continued

There are multiple ways ways to support the development of new child care spaces and facilities. They can be hosted in existing structures, in new buildings or on vacant land in modular portable buildings. The program can be managed internally or facilities can be rented to an independent child care operator.

* 16. In your opinion, how likely is it that your organization would consider incorporating new or additional space for child care on its grounds or within its facilities within the next ten years? *(The child care could be provided either by an outside operator or by your organization.)*

- ☐ Not at all likely
- ☐ Somewhat likely
- ☐ Likely
- ☐ Very Likely

Feel free to explain your response.

Contra Costa County Child Care Stakeholder Survey

IF at all likely to consider planning for future on site child care

17. Who at your organization would be the best person to contact about this possibility?

Name

Email Address

Phone Number

* 18. Please click below to go to the final survey page.

☐ Click here

Contra Costa County Child Care Stakeholder Survey

For Faith-Based Organizations

In a recent survey of Contra Costa County child care providers, 20% of centers reported being located in a building owned by a faith-based community.

* 19. Please tell us the name of your congregation.

20. In what city are you located?

* 21. Does your congregation rent or own its facilities?

- ☐ We rent.
- ☐ We own.

Contra Costa County Child Care Stakeholder Survey

For Faith-Based Organizations Which Own Their Facilities

* 22. Does your congregation currently provide space for licensed, weekday child care services?

☐ Yes

☐ No

23. What is the name of the child care program housed on your grounds?

Contra Costa County Child Care Stakeholder Survey

Faith-Based Child Care Site Opportunities

There are multiple ways ways to support the development of new child care spaces and facilities. They can be hosted in existing structures, in new buildings or on vacant land in modular portable buildings. The program can be managed internally or facilities can be rented to an independent child care operator.

* 24. In your opinion, how likely is it that your congregation would consider incorporating new or additional space for child care either within its current facilities or on its grounds within the next ten years?

- ☐ Not at all likely
- ☐ Somewhat likely
- ☐ Likely
- ☐ Very Likely

Feel free to explain your response.

Contra Costa County Child Care Stakeholder Survey

For Faith Based Organizations which may consider offering future space for child care

* 25. How likely would it be for your congregation to consider offering land or renting space to an independent child care operator?

- ☐ Not at all likely
- ☐ Somewhat likely
- ☐ Likely
- ☐ Very Likely

Feel free to explain your response.

* 26. Please click below to go to the final survey page.

- ☐ Click here

Contra Costa County Child Care Stakeholder Survey

For Faith Based Organizations Which RENT Their Facilities

27. We have a set of questions for owners of facilities. Would you kindly provide us with the owner's contact information so we may invite them to respond to this survey?

Name

Email

Phone

* 28. Please click below to go to the final survey page.



Click here

Contra Costa County Child Care Stakeholder Survey

Education Sector

29. With which school district are you affiliated? *(Please select your district from the drop-down menu below.)*

30. Does your district currently host any infant/toddler programs for children ages 0-2 years?

- ☐ Yes
- ☐ No
- ☐ Not sure

31. Does your district currently host any child care or early learning programs for children ages 3-4 years?

- ☐ Yes
- ☐ No
- ☐ Not sure

32. Does your district currently host any child care or early learning programs for school aged children, ages 5-12 years?

- ☐ Yes
- ☐ No
- ☐ Not sure

33. Does your district currently offer space for privately operated early childhood programs for children under five years of age?

- ☐ Yes
- ☐ No
- ☐ Not Sure

34. Has your district discontinued providing space it previously provided for infant/toddler/preschool programs?

- ☐ YES, we previously hosted early education program/s, but have discontinued the programs listed in the comment box below.
- ☐ NO. Our district has never provided space for infant, toddler or preschool programs.
- ☐ Does not apply. We still provide space.
- ☐ I don't know.

If you answered YES, please describe the formerly hosted early childhood program and tell us why the district discontinued offering the space.

* 35. Does your district have any potential rooms, portables or land which might be converted for early education programs?

- ☐ Yes
- ☐ No

Contra Costa County Child Care Stakeholder Survey

Potential School Site Locations

36. At what sites might space be available?

School name/s

Describe types of facilities
or land under
consideration

* 37. Please click below to go to the final survey page.

☐ Click here

Contra Costa County Child Care Stakeholder Survey

Cities

* 38. With which jurisdiction are you affiliated?

39. Which best describes your role?

- ☐ Elected Official
- ☐ Commissioner
- ☐ Management
- ☐ Other Staff
- ☐ Other (please specify)

There are multiple ways ways to support the development of new child care spaces and facilities. They can be hosted in existing structures, in new buildings or on vacant land in modular portable buildings. The program can be managed internally or facilities can be rented to an independent child care operator.

40. Are you aware of any under-utilized or vacant buildings or land **OWNED by your jurisdiction** which might accommodate child care facilities?

- ☐ Yes
- ☐ No

If yes, please describe the type of property and location.

41. Are you aware of any other under-utilized or vacant buildings or land **WITHIN your jurisdiction** which might accommodate child care facilities?

☐ Yes

☐ No

Please describe type of property and location.

42. Are you aware of any **planned or under-construction** development projects in your jurisdiction that **already include** child care or early learning facilities?

☐ Yes

☐ No

Please describe type of property and location.

43. Are you aware of any **proposed** development projects in your jurisdiction that **might possibly accommodate** child care in its facilities or on its grounds?

☐ Yes

☐ No

Please describe type of property and location.

44. Does the city have a list of projects that are currently active and in the entitlement process?

☐ No

☐ Yes

How can we access it?

45. Does your jurisdiction offer **incentives for businesses** to provide space for onsite child care?

☐ Yes

☐ No

☐ I don't know

If you answered yes, please provide more detailed description.

46. Does your jurisdiction offer incentives for **multi-family housing developments** to provide space for onsite child care?

- ☐ Yes
- ☐ No
- ☐ I don't know

If you answered yes, please provide a more detailed description.

47. Does your jurisdiction have a **child care impact fee program or other funding mechanism** for child care?

- ☐ Yes
- ☐ No
- ☐ I don't know

If you answered yes, please provide a more detailed description.

48. Does your jurisdiction include policies that promote and allow for child care **in the General Plan**?

- ☐ Yes
- ☐ No
- ☐ I don't know

If yes, can you provide us with more information and links to your General Plan?

49. In your opinion, how likely is it that your jurisdiction **would consider participating in planning for some type of countywide facilities funding plan for child care?**

- ☐ Not at all likely
- ☐ Somewhat likely
- ☐ Likely
- ☐ Very Likely

50. In your opinion, how likely is it that your jurisdiction would consider the following mechanisms...

	Not at all likely	Somewhat likely	Likely	Very likely	I don't know
Bond financing	☐	☐	☐	☐	☐
Parcel taxes	☐	☐	☐	☐	☐
Special benefit assessments	☐	☐	☐	☐	☐
General fund certificates of participation	☐	☐	☐	☐	☐
Developer Impact fees	☐	☐	☐	☐	☐
Integrated finance districts or other community facilities district	☐	☐	☐	☐	☐

51. Are you aware of any major child care planning or policy efforts in your community? If so, can you provide more information.

52. Do you have any suggestions or other strategies your jurisdiction might consider to address the child care facilities shortage?

Contra Costa County Child Care Stakeholder Survey

Other Opportunities and Ideas

53. Do you know of any potential buildings or sites (vacant lots, buildings, shared facilities, etc.) **in Contra Costa County** which might be developed for child care/early learning facilities that you have not already told us about?

☐ Yes (please describe below)

☐ No

Please describe the potential space/s you have in mind, and any contact information available.

54. Do you have any questions for us about incorporating early learning and child care into site and facilities planning?

55. Who or what entities do you believe are responsible to ensure a continued supply of quality early learning and child care in Contra Costa County? *(Please check all that apply).*

- ☐ State of California
- ☐ Contra Costa County Government
- ☐ Contra Costa County Office of Education
- ☐ Contra Costa County First 5 Commission
- ☐ Local School Districts
- ☐ City Government
- ☐ Real Estate Developers
- ☐ Large Employers
- ☐ Child Care Providers
- ☐ Other Private Business
- ☐ Faith Based Organizations
- ☐ Non-Profit Sector
- ☐ Philanthropy
- ☐ Parents
- ☐ Other (please specify)

56. Do you have any suggestions or anything else you would like to tell us as we consider ways to ensure adequate supply of child care facilities in Contra Costa County for the years to come?

57. Do we have permission to list your organization in our report as a contributor to this study?

- ☐ Yes
- ☐ No
- ☐ Not sure
- ☐ I am responding as an unaffiliated individual

58. Do we have permission to list your name as a contributor to this study?

- ☐ Yes
- ☐ No

59. Would you like us to email you a link to the final summary report?

☐ Yes

☐ No

60. If we have a question regarding any of your responses may we contact you?

☐ Yes

☐ No

61. Kindly provide your name and contact information. *(Only if you gave permission above, we will include your name as a contributor to the report, use the email to send you a link to the final report, or give you a call to follow-up on your questions or comments.)*

Name

Email

Phone



Contra Costa County Child Care Stakeholder Survey

Thank You!

Thank you for assisting us in planning for long-term availability of local child care facilities. Feel free to forward your invitation email to others, or to send them this link. <https://www.surveymonkey.com/r/Kiddos>