



Final Report:

TOWN OF HILLSBOROUGH PROFILE

San Mateo County

Child Care Needs Assessment 2022 and 2032:

Supply and Demand Summary

Prepared for

San Mateo County Child Care Partnership Council,

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



Prepared by
Brion Economics, Inc.

November 2022

TOWN OF HILLSBOROUGH CHILD CARE SUMMARY

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

DEMOGRAPHICS¹

Hillsborough	2022	2032	Net Change	% Change
Total Population	11,497	11,660	163	1.4%
Total Employees	2,214	2,235	21	0.9%
Children Under 2 Years Old	164	150	(14)	-8.4%
Children 2 to 4 Years Old	255	234	(21)	-8.4%
Children 5 to 12 Years Old	1,216	1,125	(91)	-7.5%
Total Children 0 to 12 Years Old	1,635	1,509	(126)	-7.7%
Children 0 to 12 as % of Total Population	14.2%	12.9%		-1.3%

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

CHILD CARE SUPPLY AND DEMAND AS OF 2022

- **Child Care Providers:** Five total providers: one Family Child Care Home (FCCH Spaces) and four Child Care Centers (Center Spaces) with a total of 159 spaces.
- **2022 and Estimated Supply of Child Care Spaces²**

2022 Supply in Hillsborough				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	3	-	3	2%
Preschool	6	85	91	57%
School Age	5	60	65	41%
Total Supply	14	145	159	100%
% of Supply	9%	91%	100%	

2032 Supply in Hillsborough					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change
Infants	3	-	3	2%	-	0%
Preschool	6	85	91	57%	-	0%
School Age	5	60	65	41%	-	0%
Total Supply	14	145	159	100%	-	0%
% of Supply	9%	91%	100%			

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

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

- **Planned Spaces:** In Hillsborough, there are no known new planned child care projects.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 817 spaces, including 787 spaces for residents and 30 spaces for non-resident employees working in Hillsborough and commuting in from outside the County.

2022 Demand in Hillsborough				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	61	12	73	9%
Preschool	156	18	174	21%
School Age	570	-	570	70%
Total Demand	787	30	817	100%
% of Demand	96%	4%	100%	

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

2032 Demand in Hillsborough					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	53	12	65	8%	(8)	-11%
Preschool	139	18	157	19%	(17)	-10%
School Age	624	-	624	74%	54	10%
Total Demand	816	30	846	100%	29	4%
% of Demand	96%	4%	100%			

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

Estimated Surplus or Shortage of Spaces by Year - Hillsborough				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(70)	4%	(62)	5%
Preschool	(83)	52%	(66)	58%
School Age	(505)	11%	(559)	10%
Total Surplus/(Shortage)	(658)	19%	(687)	19%

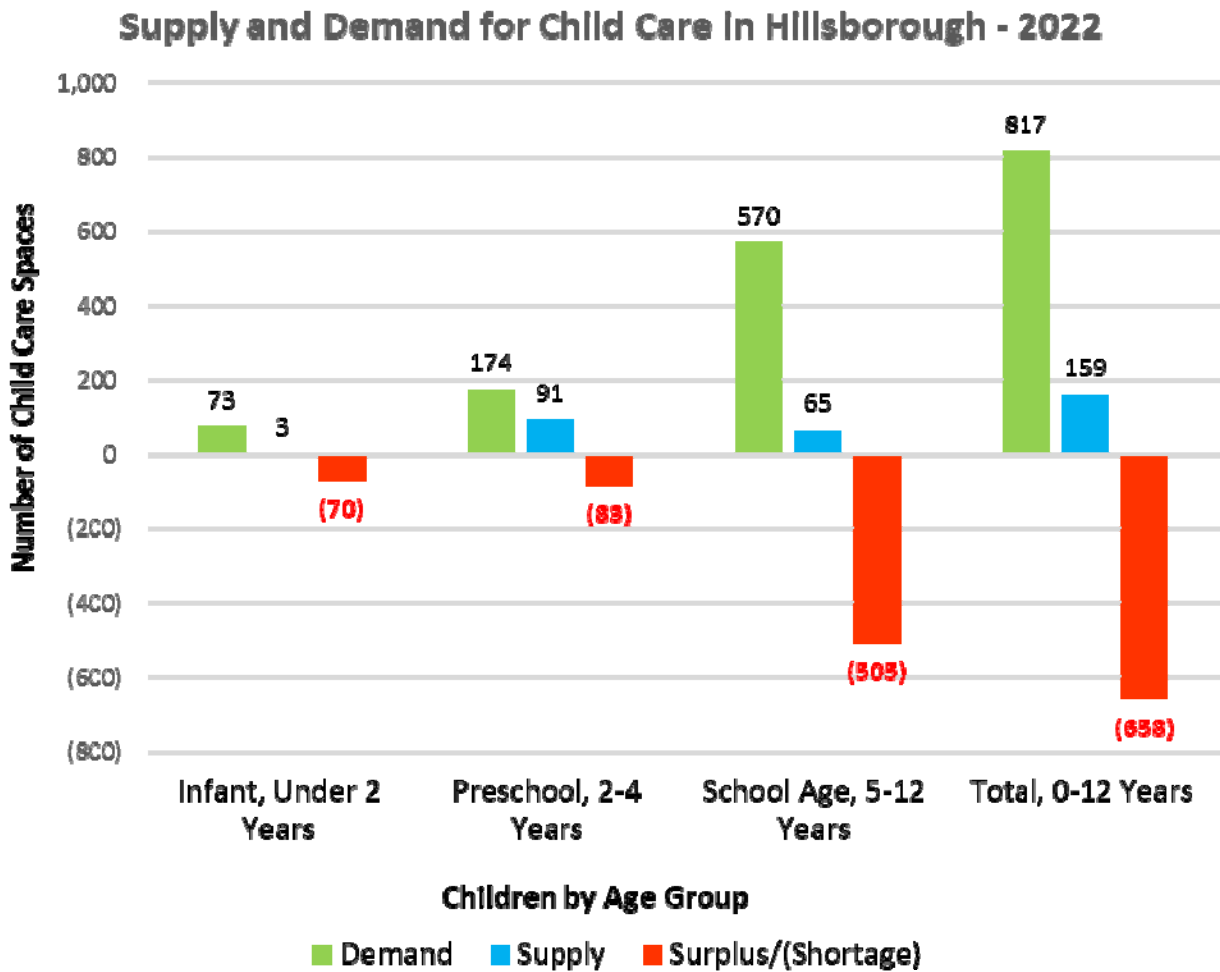
- **Subsidized Need and Spaces:**³ According to data from SMCOE and the California Department of Education, Hillsborough has 4 Infant and 4 Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,⁴ Hillsborough has 165 children ages 0 to 4 that qualify for subsidized care. This translates into 5% of the current need being met. There is an unmet need for 157 subsidized spaces for children 0 to 4 years old.

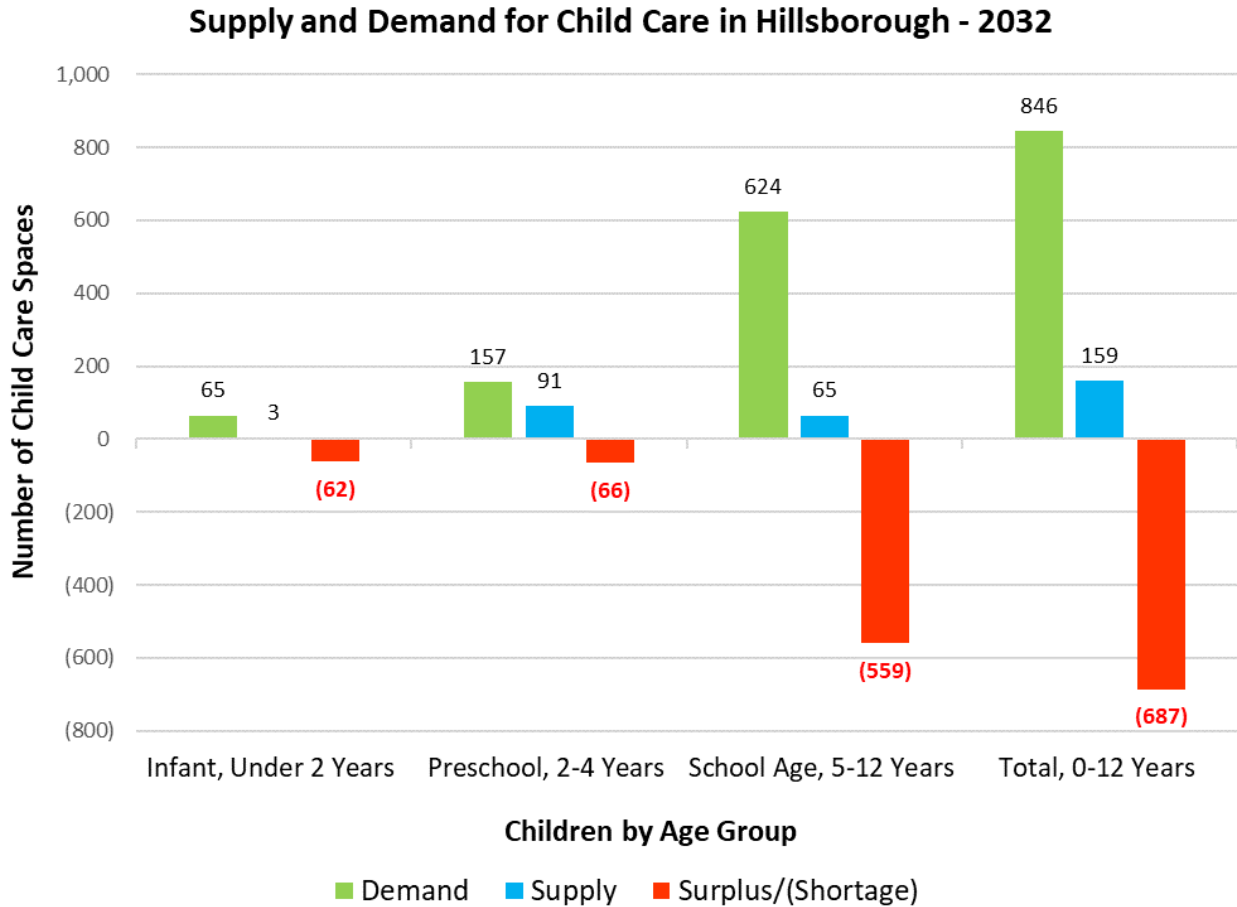
³ Includes State Preschool, General Child Care, ASES, Early Head Start, and Head Start, CalWORKs – Stage 2 and 3, and Alternative Payment programs. Age groups for subsidized care are Infants, birth to 2 years old, and Preschool, 3 and 4 years old.

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

Hillsborough - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	450	272	722
Eligible (Need) for Subsidized Spaces	103	62	165
Percent of Total Children	23%	23%	23%
No. of Subsidized Spaces	4	4	8
Unmet Need	(99)	(58)	(157)
Percent of Need Met	4%	7%	5%

Supply and Demand Summary by Year





METHODOLOGY OVERVIEW

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

Age Group	2022 Demand	2032 Demand	Difference
Infants - Under 2 Years	37.2%	35.0%	-2.2%
Preschool, 2-4 Years	61.2%	68.8%	7.7%
School Age, 5 or older	46.9%	54.0%	7.2%

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

STUDY ACKNOWLEDGMENTS AND FUNDING

BEI would like to acknowledge the following individuals and organizations for their support in this effort:

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

Funding for this study was provided by:



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

⁶ This is the most current data available.