

Marin County Child Care Commission

# Early Learning & Care Needs Assessment

2024





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# Introduction

This report provides a snapshot of child care and early education in Marin County, based primarily on quantitative data, including elements required by Education Code Section 8499.5 (b)(1) and (2), to offer a comprehensive view of local needs.

## **Background**

The Commission acts as the state-mandated Local Child Care and Development Planning Council (LPC), planning for child care and development services based on the needs of families in the local community. As the Marin County LPC, one of the Commission's responsibilities is to assess child care needs in the county no less than once every five years. The last assessment was conducted in 2018.

One role of the Marin County Child Care Commission is to lead and support countywide plans and advocacy efforts to ensure access to high-quality early learning and care services. Established in July 1995 by the Board of Supervisors, the Commission serves an advisory role to help direct policy by making suggestions and recommendations to local elected policymakers and government management.

## **Purpose**

The Commission provides a forum to identify local priorities for early care and education services and develop policies and strategies to meet them. The countywide Needs Assessment is intended to guide the preparation of a local comprehensive countywide 5-year early learning and care Master Plan that is designed to mobilize public and private resources to address the identified needs. This 2024 Needs Assessment provides key information for the design of the 2025-2030 Marin County Master Plan.

## **Report Structure**

The Needs Assessment findings and information are organized into the following sections:

- Characteristics of children & their families in Marin County
- Cost of raising a family in Marin
- Cost of Child Care in Marin
- Child Care supply & demand
- Workforce
- Measures of quality
- Key findings
- Next Steps for the Marin County Child Care Commission

# Characteristics of Children and Their Families in Marin County

*Marin County is home to an estimated 36,094 children under the age of twelve.*

Approximately 262,361 individuals reside in Marin County. Marin is home to 27,192 families with children under the age of 18 (American Community Survey, 2022). There are 36,094 children under the age of 12 living in Marin County (Fig. 1). Children in Marin are primarily white/not Latino (49%) or Hispanic/Latino (35%) as shown in Figure 2.

## Marin Children by Age

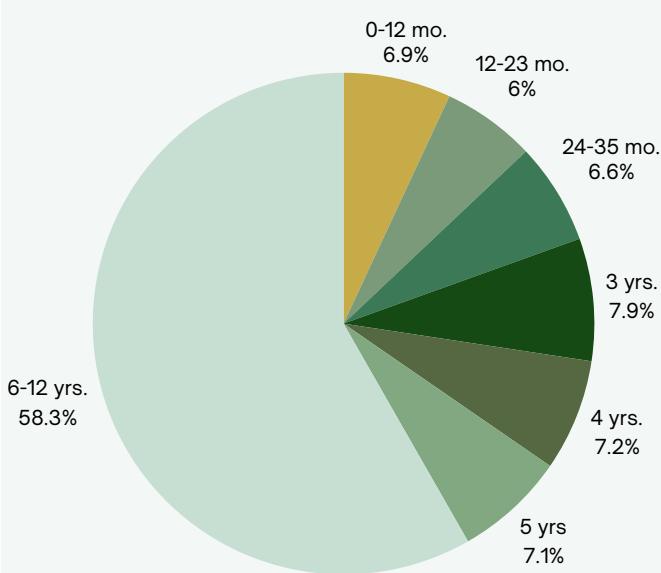


Fig. 1 Source: American Community Survey/AIR

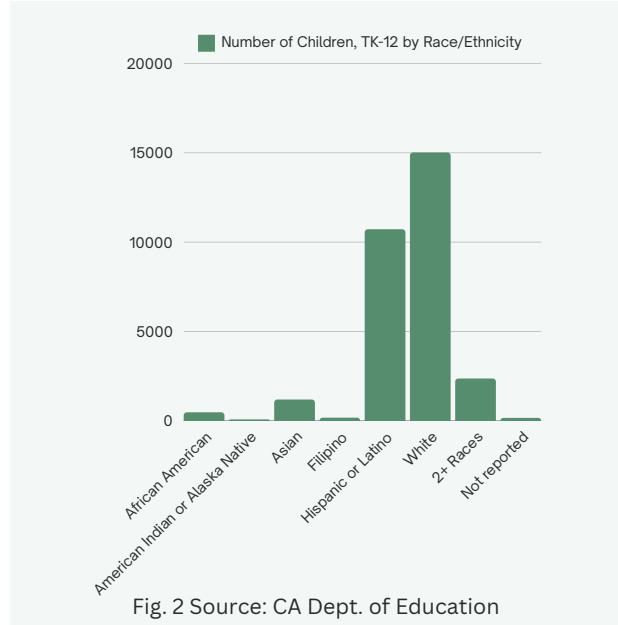


Fig. 2 Source: CA Dept. of Education

According to Marin SELPA, thirteen (13) children were provided special education services through an Individual Family Service Plan (IFSP) in Early Start; and 290 preschoolers and 2,615 five 12-year-olds were provided services through an Individual Education Plan (IEP). Golden Gate Regional Center confirmed their agency served 202 children through an IFSP.

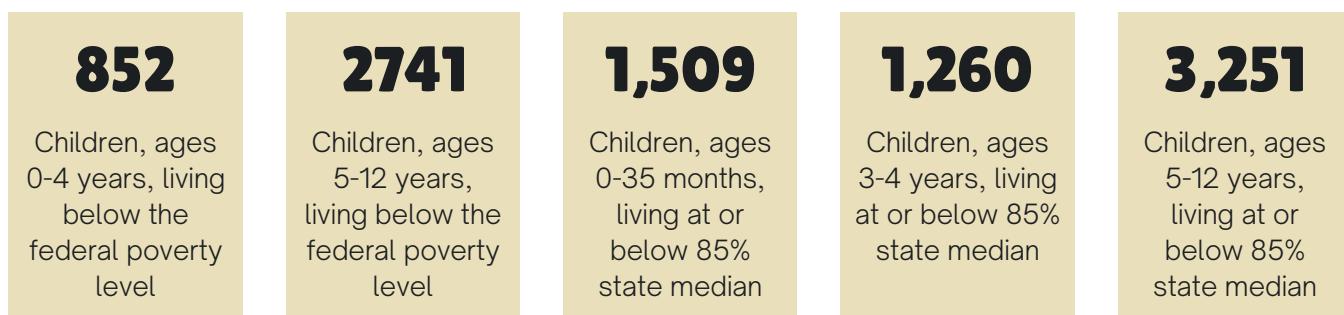
In 2023-2024, there were 234 children in the Child Protective system. Children Now

stated most children in Marin are healthy, have access to health insurance, and food.

Compared to other Northern California counties, Marin continues to have one of the lowest numbers of children living in migrant families. Based on CALPADS data from CA Department of Education, there are sixteen 0-12-year-olds.

## Estimated Number of Children Eligible for Subsidized Care

Children, birth to preschool age who live below the federal poverty level are eligible for Early Head Start and Head Start early learning and care. Children, ages 0-12 years, who are at or below 85% state median qualify for state subsidized early learning and care in General Care and Education (CCTR) and California State Preschool Programs (CSPP).



Sources: US Census, Marin, 2022 and Marin County Office of Education (2020 data) on subsidized childcare

In families where a language other than English is spoken, 51% primarily speak Spanish, representing 23.8% of all children, ages 5-17 years. Other common languages in the county include Indo-European and Asian/Pacific Island languages (US Census, 2020).

Among English Learners in Transitional Kindergarten and Kindergarten, 20.1% are native Spanish speakers. Other languages include Portuguese, Russian, French, Asian/Pacific Island languages. (California Department of Education, 2023).



## Map of Children, under 18 years, in Marin, 2020

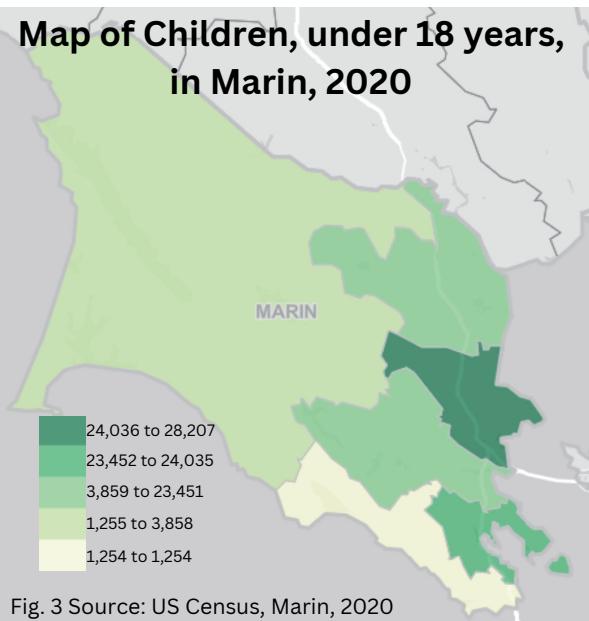


Fig. 3 Source: US Census, Marin, 2020

In Marin County, nearly half (49.6%) of children under 18 live in Central Marin. About a quarter of children live in North Marin (22.4%) and South Marin (23.1%), while only 4.9% reside in the county's rural areas.

# 2023 Marin County Scorecard of Children's Well-Being

Children Now's 2023 California County Scorecard of Children's Well-Being offers a comprehensive look at how children are doing in Marin County.

|               |  |
|---------------|--|
| <b>89%</b>    | Families who received prenatal care beginning the first trimester.               |
| <b>99%</b>    | Families who received prenatal care beginning the first trimester.               |
| <b>53%</b>    | Children, 0-5 years and low-income, who visited a dentist last year.             |
| <b>95%</b>    | Children who <u>are not</u> food insecure.                                       |
| <b>41.35%</b> | Children, 0-17 years, who have at least one immigrant parent.                    |
| <b>3.54%</b>  | Students, TK-12, experiencing homelessness.                                      |
| <b>58%</b>    | 3rd graders who met or exceeded standards in English Language Arts / Literacy.   |
| <b>84%</b>    | Students, TK-12, who <u>were not</u> absent from school.                         |
| <b>48%</b>    | Children in working families for whom a licensed child care space was available. |

# Cost of Raising a Family in Marin

*By various indicators, the majority of families in Marin County have an income that is below the cost of living.*

Marin is a county with people of diverse socio-economic statuses, backgrounds, and ethnicities. This section considers the types of families living in Marin, their levels of income, and the challenges in supporting their families.

According to the American Community Survey 2022, median income in Marin County is \$136,214 which is almost 49% more than California's median income of \$91,551. Twenty-seven (27) percent of Marin families earn \$99,999 or less. While a single parent with an infant would need

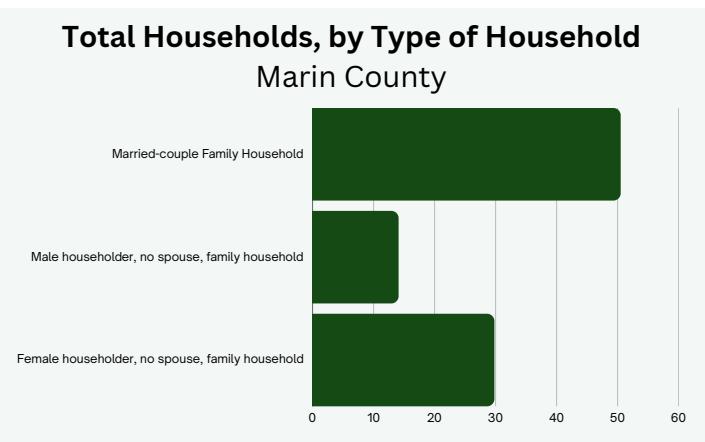


Fig. 5 Source: American Community Survey, Marin 2022

## Self-Sufficiency Standards for Families

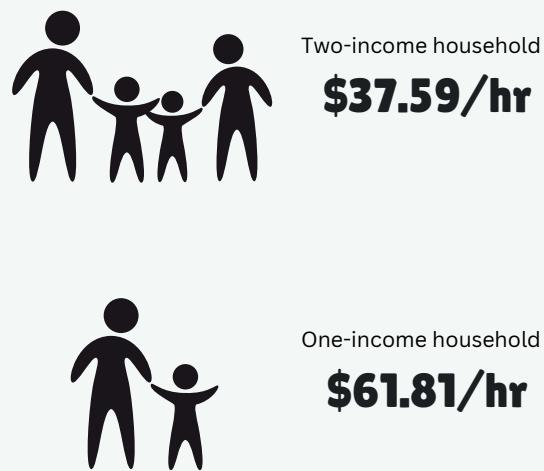
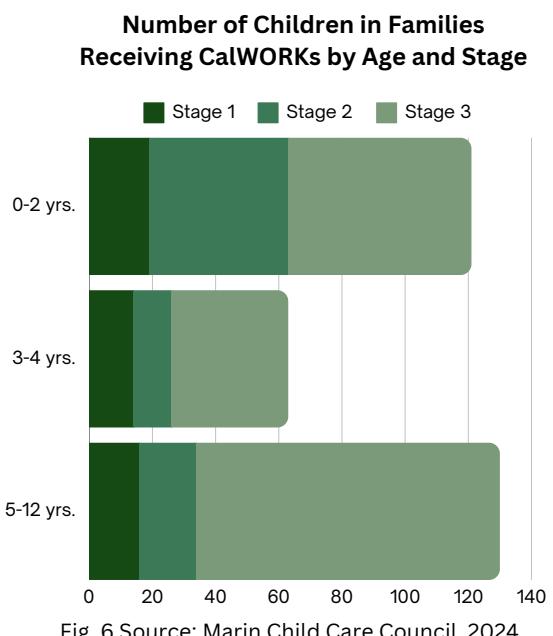


Fig. 4 Source: The Self-Sufficiency Standard Workbook, 2021

to earn approximately \$130,547 annually to meet their basic needs at a minimally adequate level. (Self-Sufficiency Standard Workbook, 2021).

The unemployment rate in Marin County was 4.1% in July 2024 (State of CA, Employment Development Department). This is up from last year (3.8%); and compares with an unadjusted unemployment rate of 5.8% for California.

CalFresh, the Supplemental Nutrition Assistance Program (SNAP), provides monthly food benefits. The CalFresh Program helps to improve the health and well-being of qualified households and individuals by providing them with a means to meet their nutritional needs. In 2023, there were 4,854 children, under 18 years, participating in CalFresh, this is almost a 29% increase from 2019 (CalFresh Dashboard).



California Work Opportunities and Responsibility to Kids Act (CalWORKs), the federal Temporary Assistance for Needy Families (TANF) program, has a three-stage child care system. During 2023-24, Marin Child Care Council reported 314 children, 0-12-years old, in families, received CalWorks support.

The Marin Child Care Council 2023 survey identified challenges for families. Most significant were:

- Finding affordable & quality child care
- Finding affordable housing in Marin
- Not having sufficient funds for food



Additionally, the survey identified key challenges families have when providing for or supporting children:

- Extra-curricular activities are not affordable
- Children spend long hours in child care
- Support is needed to learn second languages and home languages
- Addressing bullying issues experienced by children

# Cost of Early Learning and Care in Marin

*Marin continues to have some of the highest early learning and care costs in California.*

Families in Marin County continue to pay more for early learning and care, including family childcare, than the average family statewide. This section looks at the current average costs for early learning and care, the reimbursement rates for providers who support families to use vouchers to help

## Average Monthly Cost of Full-Time Care in Marin



**Child Care Centers**  
**\$2,315**

38% increase since 2018



**Family Child Care**  
**\$2,146**

33% increase since 2018

Fig. 7 Source: Marin Child Care Snapshot Report, 2023

## Center & Family Child Care Full Time Maximum Regional Market Rates 2024

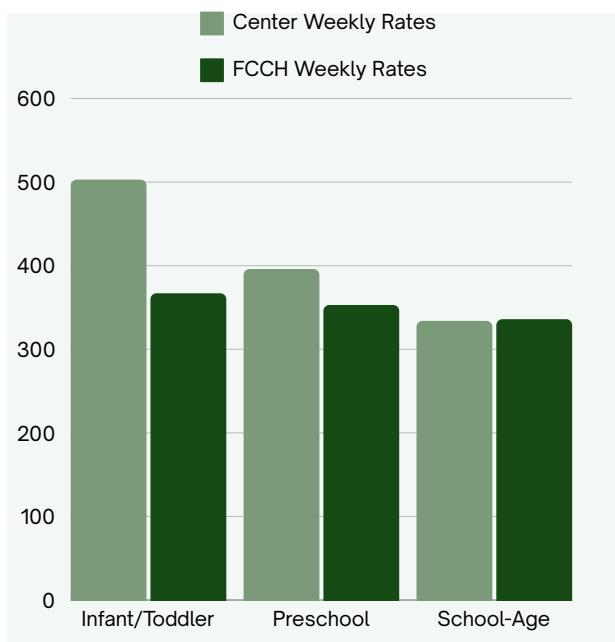


Fig. 8 Source: CA Dept. of Education, CALPADS, 2023-2024

pay for care, and a visual comparison of the cost of housing versus child care.

For center-based infant care the average cost of care in Marin is 24% more than the statewide average. Families pay 40% more for center-based preschool in Marin than the statewide average.

The Fair Market Rent for a 2-bedroom apartment in Marin is \$3,359 per month and has a 80.2% higher FMR than the California average of \$1,864 and is ranked the 2nd highest county (USHousingData.com, 2024).

## Paying for Child Care and Housing

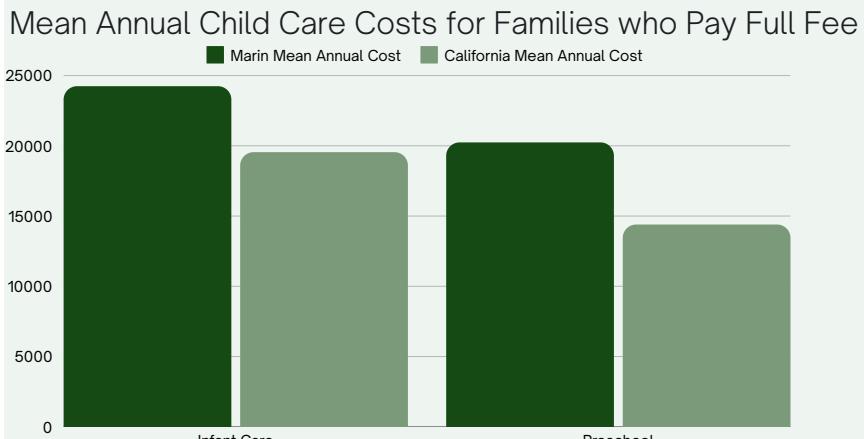


Fig. 9 Sources: Procare Solutions; CA 2023, Kidsdata.org, Marin 2021



## Monthly Average Payment for Housing

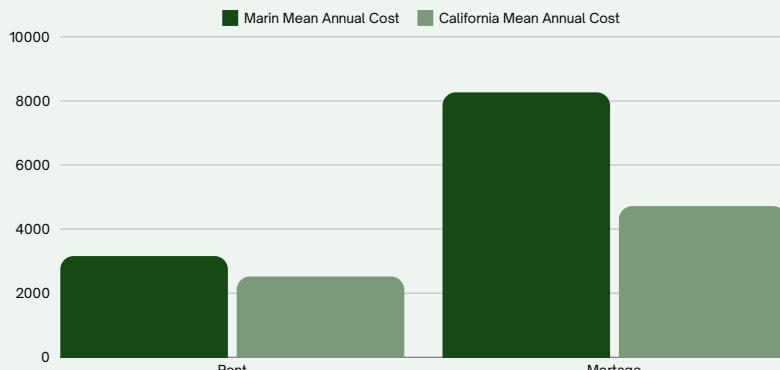


Fig. 10 Sources: National Association of Realtors, Marin 2023, RentCafe, Marin 2024

Child Care and Family Budgets for an Income Eligible Family with Child Care Subsidy (Families who Receive Help Paying for Care)



Fig. 11 Source: 2021 Child Care Portfolio, California Child Care Resource & Referral Network

# Child Care Supply and Demand

*Lack of child care options is a barrier to parents finding gainful employment or seeking training opportunities.*

As referenced earlier, in Children Now's 2023 Scorecard, only 48% of children in working families had a licensed early learning and care space available for them. To analyze the unmet need for subsidized childcare (financial assistance for low-income families) in Marin County, this

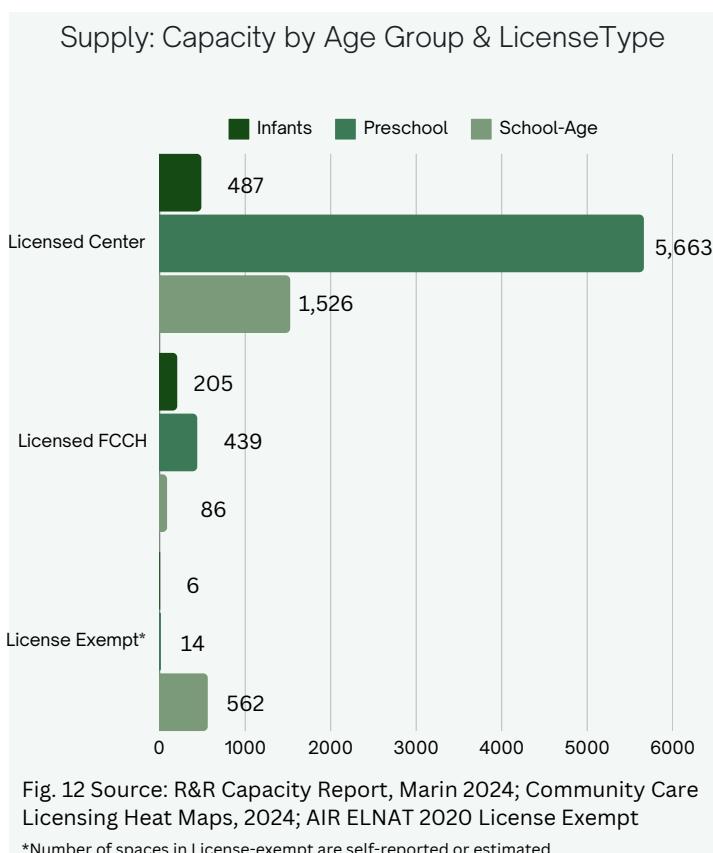


Fig. 13 Source: R&R Capacity Report, Marin 2024; Community Care Licensing Heat Maps, 2024

section looks at the enrollment capacity (supply) for different early learning and care options, current enrollment in federal and state-funded programs, and the number of children who have both parents working (demand). The most current data to show “unmet need” is from 2020.

Marin 2024 Zip Code Priorities include:

- Infant/Toddler: San Rafael/Terra Linda, Greenbrae (94903, 94904)
- Preschool: San Rafael, San Rafael/Terra Linda, Novato (94901, 94903, 94945, 94947, 94949)
- School-Age: San Rafael, San Rafael/Terra Linda, Novato (94901, 94903, 94945, 94947, 94949)



Children served in Subsidized Child Care & Development Subsidy Programs (Point in Time)

| Funding/Program Type                       | Infant / Toddler | PreK | School Age |
|--|------------------|------|------------|
| Full Day Center (CCTR)                     | 262              | 35   | 103        |
| CA State Preschool Program Full Day (CSPP) | -                | 61   | -          |
| CA State Preschool Program Part Day (CSPP) | -                | 180  | -          |
| FCCH Networks                              | 7                | 71   | 67         |
| California Alternate Payment (Voucher)     | 196              | 192  | 259        |
| CalWORKS Stage 1                           | 19               | 44   | 58         |
| CalWORKS Stage 2                           | 14               | 12   | 37         |
| CalWORKS Stage 3                           | 16               | 18   | 96         |
| Head Start                                 | -                | 196  | -          |
| Early Head Start                           | 143              | -    | -          |
| Other-License Exempt                       | 0                | 14   | 25         |

Fig. 14 Source: AIR ELNAT Data; Marin Child Care Council, 2024

### TK student enrollment 2013-2024

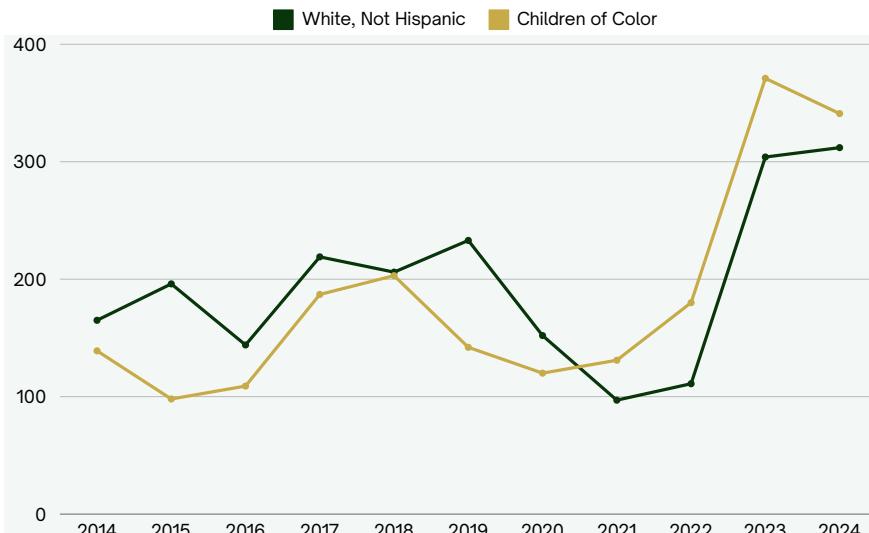


Fig. 15 Source: CA Dept. of Education, 2013-2024, Marin TK Enrollment by Ethnicity

# What is the Unmet Need?

Unmet need is differentiated by income and eligibility; families with working parents, those earning under 85% of the state median income, and those below the federal poverty level. The greatest gap continues to be in Infant & Toddler care. While there is a surplus of private care for ages 3-5, access to preschool care is limited for families whose income falls below the state (68% shortage) and federal (35% shortage) poverty levels. Additional public funding overall would help meet the needs, allowing families to access both public (Head Start state contracted programs) and private (MC3 vouchers) child care providers.

| Populations  | Ages 0-2          | Ages 3-5         | 6 and older     |
|--|-------------------|------------------|-----------------|
| Number of children with <u>all</u> parents in the workforce ( <i>all income levels</i> )   | 4,516             | 4,986            | 14,307          |
| <u>Unmet need</u> for the number of children who need full-time care in families with all parents in the workforce.                    | 3,818<br>(85%)    | -1,130<br>(-23%) | 12,133<br>(84%) |
| Populations  | Ages 0-2          | Ages 3-5         | 6 and older     |
| Number of children in families with working parents who are at or below 85% SMI  | 1,515             | 1,990            | 3,821           |
| <u>Unmet need</u> for number of children in families with all parents in the workforce who need full-time & qualify for state subsidy. | 1,253<br>(82.71%) | 1,359<br>(68%)   | -               |
| <u>Unmet need</u> for children eligible for Early Head Start or Head Start services.   | 164<br>(53%)      | 166<br>(35%)     | -               |

Figure 16 Source: Calculations from previous data; AIR ELNAT Data, Marin, 2020; CAM Head Start Waitlist data, Marin, 2024; Sections 9-10 Source: American Community Survey analysis by AIR Databrowser & U.S. Census Bureau, Marin, 2020. \*Due to data limitations, full-time care for "all" working parents is calculated from licensed child care centers and family child care home capacity only. (-) = No data available



# Workforce

*Early learning and care staff face challenges to their well-being, often struggling to afford housing, healthcare, food, and other basic needs.*

Marin Teachers and Assistant Teachers, earn less than the self-sufficiency wage of \$37.59/hour for a family of 4 (Fig. 20). Those who cannot afford to live in Marin commute from other counties. Additional data (Fig. 18) shows that 1 in 4 teachers have less than 5 years of experience and

## Workforce Age by Role

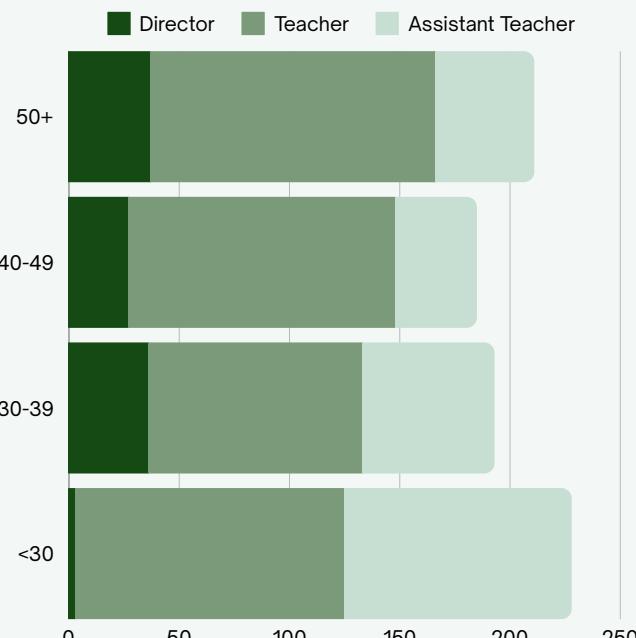


Fig. 17 Source: Marin Child Care Council Workforce Survey 2024

## Years in the Field, Percentages

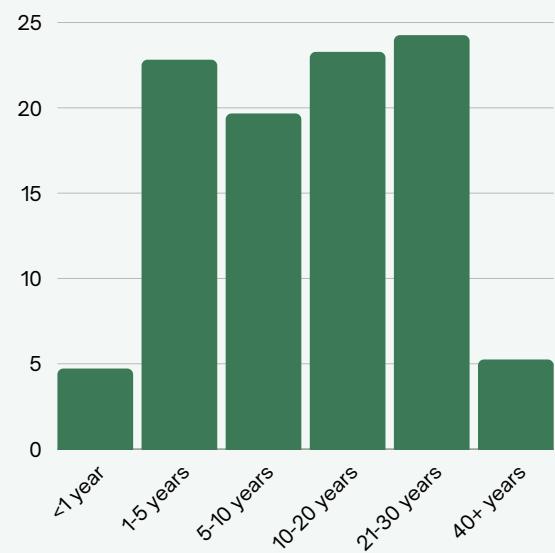


Fig. 18 Source: CA ECE Workforce Registry, Marin 2024

Marin has an aging workforce. Despite common stressors for the ECE workforce, like low wages and increased illness, teachers in Marin say they are “very well” in terms of their general health and well-being (Marin Child Care Council, Workforce Survey, 2024).

## Highest Level of Education

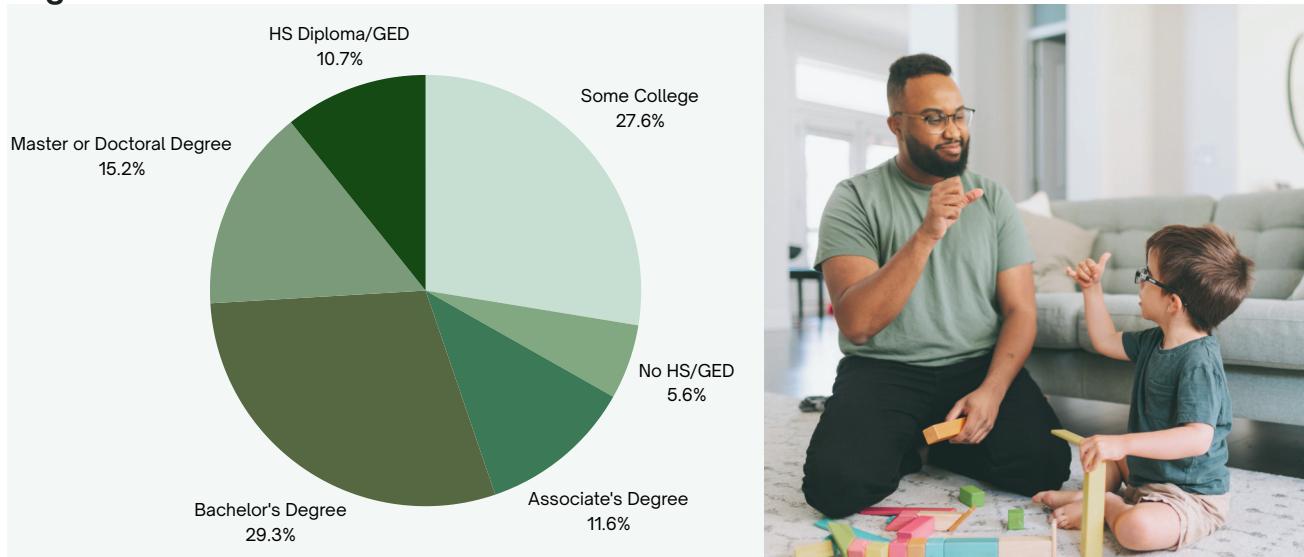


Fig. 19 Source: CA ECE Workforce Registry, Marin 2024

## Average Hourly Wage



Fig. 20 Source: Marin Child Care Council Workforce Survey 2024

\*data reported as annual salary computed to hourly wage based on a 40-hour work week

## Workforce Benefits

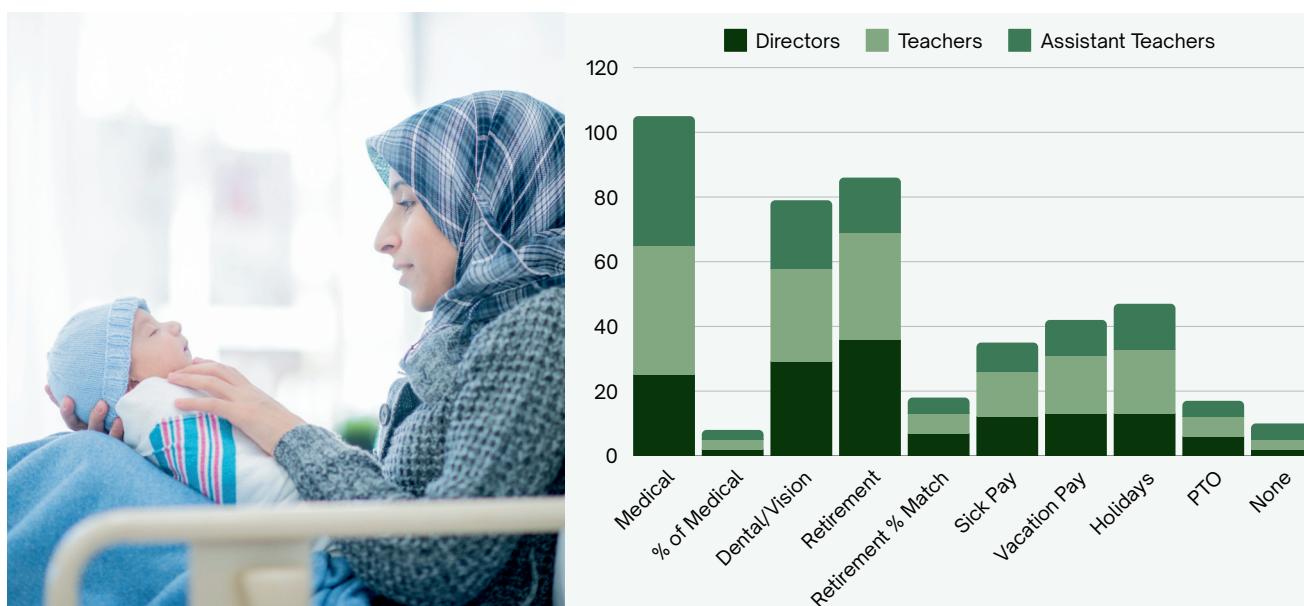


Figure 20 Source: Marin Child Care Council Workforce Survey, 2024

## Voices from the Field, Post-COVID Pandemic

“Teachers are people first and teachers second. That often gets lost in US society, which is very work driven. We need to be taken care of as human beings before we can take care of other human beings. If our teachers' well-being is not centered and prioritized, either in their own lives or in their work lives, it is going to impact the quality of care accessible to children and families. We can't provide high quality if the quality of the teachers' work environment and the quality of care in their own life is not optimal. And wages very much factor into that sense of well-being as low wages impact all areas of personal and professional wellness. Wages are a big piece of an overly complex puzzle.” ~Marin Director

“Most teachers that left [our program] commuted far, from East Bay and then had the opportunity to join an organization that is closer to home.” ~Marin Director

“The individuals that are most affected by the decision-makers do not have a voice and most often are not invited to the table.” ~Marin Teacher

“I mean, it was tough before and that just became really difficult during COVID, and things have not changed because everybody is just tired. They're worn out. They don't feel - valued. And they're just overworked...so my compensation is that I've been really trying to pay our teachers.” ~Marin Director

“Being a part of Early Childhood Education (ECE) is like a daily dose of joy and purpose. Interacting with those little learners brings not only smiles but a profound sense of fulfillment, making each day special. It's not just a job, it's a journey of shared growth and discovery. It's not about teaching, it's about making the connections and the shared moments.”

~Marin Teacher





# Measures of Quality

*Research shows that children in quality early learning programs are more likely to succeed in school and less likely to need remedial help or drop out.*

**Marin Quality Counts (MQC)** is a collaborative initiative promoting excellence in early care and education for all Marin programs, providers, and families. In addition to professional early learning support, such as coaching, professional development, mutual learning communities,



## Marin Quality Counts Participants 2024

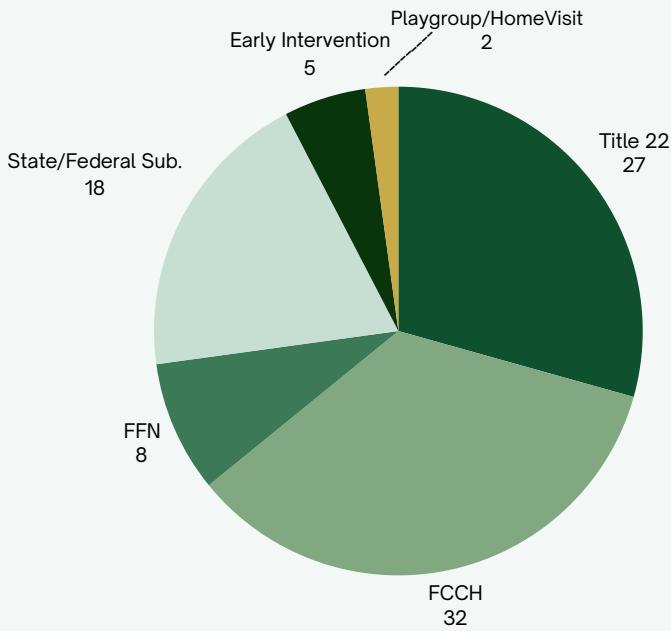


Fig. 21 Source: Marin County Office of Education, ECE Dept.

and technical assistance, the work supports California's QRIS (Quality Rating & Improvement System) for California State Preschool Programs. In 2023-2024 CSPP programs, on average were rated at a high tier of 4 (Mastering High Quality Standards).

The goal of the **Universal PreKindergarten (UPK)** is to provide a strong, early start to education for all children with high-quality, joyful, developmentally informed, inclusive, and rigorous Pre-K through third grade (P-3) learning opportunities, beginning with equitable access.

The **UPK Mixed Delivery** focus is to support relationship building between all UPK partners.

## Spotlight on Supports for Quality in 2023-2024:

- Academic Awards & Tuition Reimbursement (Marin County Office of Education/MCOE)
- DEIBJ (Diversity, Equity, Inclusion, Belonging, Justice)/Anti-Bias training (MCOE)
- Early Childhood Coaching (Marin Child Care Council/MC3 & MCOE)
- Early Childhood Environment Assessment (MC3 & MCOE)
- Early Childhood Professional Learning (MC3 & MCOE)
- Early Learning Institutes (College of Marin & MCOE)
- ECE and Transitional Kindergarten Consultation (MCOE)
- ECE Professional Growth Advising, Transcript Evaluation & Permit Support (MCOE)
- Humanity First Mutual Learning Communities (MCOE)
- Inclusive Practice technical assistance (Marin SELPA, MCOE & MC3)
- Play Groups (MC3)
- Professional Development Stipends (MC3 & MCOE)
- Provider Cafes (MCOE)
- Strive for Excellence Conference (MC3)
- Teacher-Child Interaction Assessment (CLASS) (MC3 & MCOE)
- Technical Assistance for Early Childhood Quality (MC3 & MCOE)
- Technical Assistance to Families for Child Care Access (MC3)
- Technical Assistance to School Districts for UPK & TK (MCOE)
- UPK Professional Learning for PreK, Transitional Kindergarten, and Kindergarten practitioners to support P3 alignment and UPK efforts (MCOE)

**\$101 K**

In CSPP QRIS Block Grants  
& Teacher Mini-Grants

**200+**

Stipends for Professional  
Development (\$110,000)

**\$60 K**

for Academic Awards &  
Tuition Reimbursement



# Key Findings



The American Community Survey in 2022 showed that 43.9% of households in Marin are led by a single parent.

About half of the children in Marin have one or more parents who are immigrants



53% of Children, ages birth to 5, who are in low-income families, visited a dentist in the last year

Data on children with IFSPs and IEPs is not readily available or accurate. State subsidized programs and LEAs have expressed interest in building relationships to support inclusive practices.



# Key Findings



A family of four, in which two adults work full time and earn the minimum wage in Marin County (\$16.00/hour), will pay approximately 61% of their (pre-taxed) salary, on early learning and care.

The high cost of living in Marin impacts a family's ability to find affordable child care and housing.



Current 2024 California Department of Education data shows that 8% of preschool-aged children are enrolled in TK.

Only 48% of children in working families had a licensed child care space available



# Key Findings



The ECE workforce in Marin is shifting and changing as 1 in 4 teachers have less than 5 years of experience (Figure 22) and Marin has an aging workforce. Turnover has a direct impact on the quality of care.

Assistant Teachers and Teachers on average earn less than the self-sufficiency wage of \$37.59 (for a family of 4) and thus do not live in Marin and have a daily commute





# Next Steps for the Marin County Child Care Commission (LPC)



# Next Steps for the Marin County Child Care Commission (LPC)



## ***Commitment***

LPC will work with Marin Child Care Council to get a broader understanding of the supply from private providers along with understanding the impact Transitional Kindergarten has on the demand for care.

## ***Commitment & Action***

LPC will support UPK Mixed Delivery Grant activities and hold workforce and family-focused workgroups for feedback and recommendations around access to care.

## ***Action***

LPC will work with community partners to develop a Marin County Facilities Needs Assessment and develop recommendations to expand the supply of child care.

## ***Commitment & Action***

LPC will develop the 2024-2025 Master Plan, aligned with the Early Learning Road Map. Incorporate a special focus on supporting efforts to create, maintain, and implement inclusive environments in Marin.

# Acknowledgements

The Commission members and staff of the Marin County Child Care Commission supported creation of this needs assessment:

- **Kelsey Lombardi**, Coordinator, Marin Child Care Commission\*
- **Jennifer Bell**, Director, Inclusion & Disabilities, Community Action Marin
- **Emily Bugos**, Child Development Program Director, North Marin Community Services
- **Amy Carrera**, Project Supervisor, MCOE Youth in Foster Care and Experiencing Homelessness\*
- **Daphne Cummings**, Director of Early Learning & Literacy, Marin Promise Partnership\*
- **Jordan James**, Senior Director of Youth Development, YMCA\*
- **Ginny Kuhel**, CEO/Owner
- **Jason Lau, Ph.D.**, Assistant Vice Provost for Student Life Finance and Administration

- **Kristina Sisseck**, Vice President of Programs, North Bay Children's Center
- **Jody Stamps, Program Director, Marin Child Care Council \***
- **Laura Trahan**, Assistant Superintendent Education Services, MCOE
- **Michelle Weber**, Preschool Teacher, Community Action Marin

Additionally, we would like to thank the following public agencies and organizations that provided data and information for this study:

- American Institute for Research Early Learning and Needs Assessment (AIR ELNAT) Tool
- California Department of Education
- California ECE Workforce Registry
- California Resource & Referral Network
- Center for the Study of Child Care Employment
- Children Now
- Community Action Marin
- Community Care Licensing
- Golden Gate Regional Center
- Kidsdata.org
- Marin Child Care Council
- Marin County Children and Family Services
- Marin County Health and Human Services
- Marin County Office of Education
- Marin Special Education Local Area Plan (SELPA)
- National Association of Realtors
- Procure Solutions
- RentCafe
- U.S. Census Bureau

**\*Ad-Hoc Committee: Needs Assessment**



*A special thanks to the Marin Child Care Council and the Marin County Office of Education for their leadership in ECE, including a keen understanding of Early Care and Education services in Marin County through data collection and maintaining an extensive database.*



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