San Mateo County
Child Care Supply and Demand Analysis

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Prepared for:

The San Mateo County Child Care Partnership Council

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Introduction

In 2025, the Child Care Partnership Council engaged Sarah Kinahan Consulting to conduct an updated child care supply and demand analysis due to a number of significant changes in the child care system since the *2022 San Mateo Child Care Needs Assessment*. Notably, there has been an expansion of Transitional Kindergarten (TK) which has impacted both preschool and before/after school supply and demand. In addition, the State has expanded funding for the Expanded Learning Opportunities Program (ELO-P) which provides funds to school districts for before/after school and summer and intersession programming. The State has also made changes to the eligibility for the California State Preschool Program (CSPP) which can now include 2-year olds and TK students, and more children with disabilities and families at higher income levels. The number of children ages birth to twelve years old has also declined significantly, decreasing demand. These policy, funding and demographic changes impact child care supply and demand dynamics at the local level and necessitate this supply and demand update.

This report provides a current assessment of the supply of formal child care for children ages birth to twelve in San Mateo County for families at all income levels. Formal child care includes licensed family child care homes (FCCs), licensed center-based infant, preschool and school age care, and license-exempt center-based care. The supply is then compared to the "demand" for child care. The analysis assumes that a portion of working families will desire to use formal child care, as well as sets targets for Universal Preschool expansion. The surplus or deficit of child care when compared to demand is presented at the County level as well as the City and School District Level level (see **Appendices 1, 2, and 3**).

This report also details the current supply of funded subsidized child care compared to the estimated number of income-eligible children. **Appendix 4** provides the Zip Code Priorities for Subsidy Funding which will be presented to the San Mateo County Board of Supervisors for their approval on May 20, 2025.

This analysis summarizes the areas of San Mateo County with a deficit of market-rate formal child care, and subsidized child care for children in different age groups (infant, preschool and school age). In areas of the County that seem to have a surplus of child care, the report aims to provide an explanation for this "over supply" and recommendations to utilize this capacity in new ways.

Child Care Supply and Demand - All Children and Families

This first section analyzes child care supply and demand for children and families at all income levels in San Mateo County. The following section will provide data on the supply and need for subsidized child care for children in families with lower incomes.

Child Care Supply, San Mateo County, 2025

Supply data includes:

- Licensed infant, preschool, and school age centers;[1]
- Licensed family child care homes (FCC);[2]
- License-exempt programs such as City or School District operated preschool or before/after school, Parent Co-ops, and Heritage Schools.[3]

The Center-based child care supply is made up of 67 Infant/Toddler Centers, 304 Preschools, and 172 Before/After SchoolCenters for a total of 543 Center-based sites. This is 59 more centers than in 2022, or a 12% increase in the number of centers. The number of centers is approaching the number that existed in 2017, pre-pandemic, when there were 546 centers.[4]

The FCC supply includes 473 licensed homes: 179 Small (licensed for 6 or 8) and 294 Large FCC (licensed for 12 or 14). **This is 153 fewer FCC than in 2017, or a 24% reduction in the number of FCCs over eight years.**[5]

The following table shows the age classifications used by California Community Care Licensing, which do not neatly align to three age groups due to the differences between FCC and Center requirements, and the "Toddler option" for Centers.

Table 1: Community Care Licensing Age Classifications by Program Type

<table>
<tr><th>Program Type</th><th>Infant</th><th>Preschool</th><th>School Age</th></tr>
<tr><td>Licensed FCC</td><td>Under 2 years</td><td>2 years to K entry</td><td>K and above</td></tr>
<tr><td rowspan="2">Licensed Center</td><td>Infant = 0 to 1.5 years</td><td>3 years to K entry</td><td rowspan="2">K and above</td></tr>
<tr><td colspan="2">Toddler = 1.5 to 3 years</td></tr>
</table>

[1] California Community Care Licensing, Child Care Centers, January 12, 2025, https://www.ccld.dss.ca.gov/carefacilitysearch/?rewrite=downloaddata.
[2] California Community Care Licensing, Large Family Child Care Homes, February 9, 2025, https://www.ccld.dss.ca.gov/carefacilitysearch/?rewrite=downloaddata. Small Family Child Care Homes, Child Care Coordinating Council, provided via email on January 24, 2025.
[3] License exempt supply compiled by Sarah Kinahan Consulting, 2025.
[4] Brion Economics, Inc., San Mateo County Child Care Needs Assessment – 2022.
[5] Ibid.

For the analysis of supply and demand for formal child care in this assessment, children are assigned to the following age categories: Infants includes children under age 2-years-old, Preschool includes 2 to 4-year-olds, and School Age includes 5 to 12-year-olds.

To further complicate the analysis of the data by age groups, in 2024, Community Care Licensing (CCL) began issuing a "single license" for child care providers serving infants and preschoolers. CCL no longer publishes infant and preschool capacity separately, making it challenging to estimate the supply of child care for different age groups. At the time of this analysis, twenty-five programs had a single license. The capacity for each of these centers had to be researched from their CCL reports - a time consuming task that will only get more difficult as more of these licenses are issued.

Table 2: Supply of Formal Child Care, San Mateo County, 2025

	Infant (Under 2 years)	Percent of Infant Spaces	Preschool (2 to 4 years)	Percent of Preschool Spaces	School Age (5 to 12 years)	Percent of School Age Spaces	Total (0 to 12 years)	Percent of Total Spaces
Number of Center-based Spaces	1,901	60%	18,240	88%	19,275	92%	**39,416**	**88%**
Number of Family Child Care Spaces[6]	1,269	40%	2,510	12%	1,708	8%	**5,487**	**12%**
Total Child Care Spaces	**3,170**		**20,750**		**20,983**		**44,903**	

Since 2022, there has been an 8.4% increase in the number of infant spots, a 10.7% increase in preschool spots, and 6.6% increase in number of school age spots.

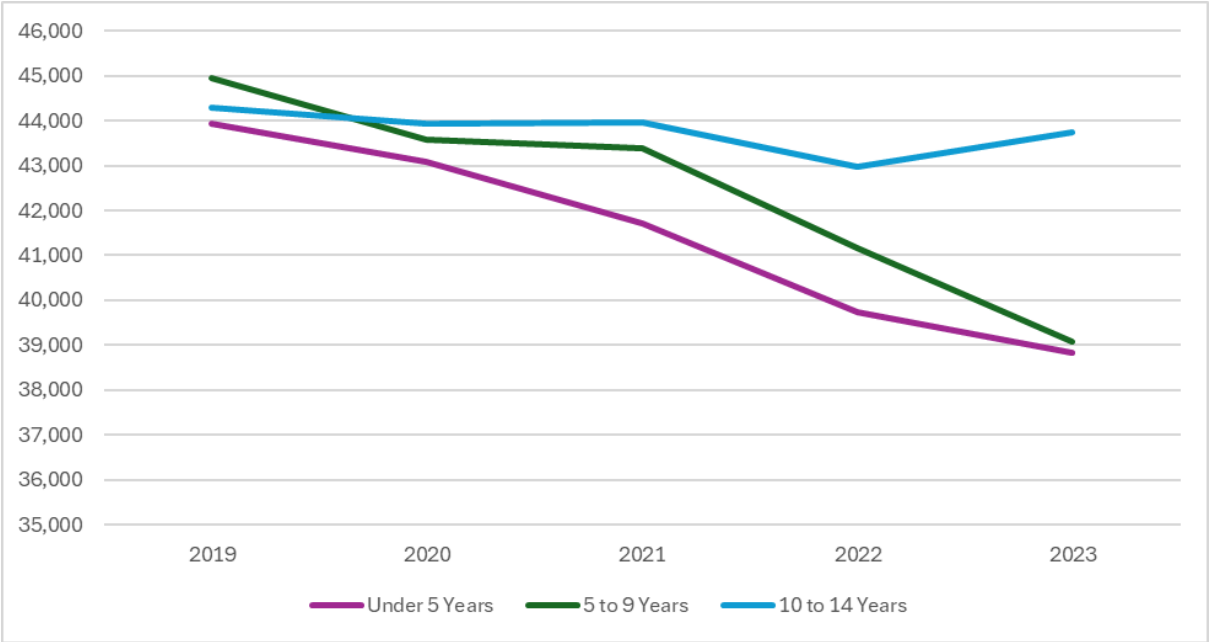
Child Care Demand

A change in the number of children in the County is the first factor impacting demand for child care. The number of children has been declining for several years as shown in

[6] For Large FCCs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCs, it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces. For Small FCCs licensed for 8, it is estimated that there are 3 infant and 3 preschool spaces. If an FCC does not enroll school age children, they can enroll more younger children.

Figure 1.[7] The number of children under age 5 has decreased by 12%, the number of children ages 5 to 9 has decreased by 13%, and the number of children ages 10 to 14 has declined by 1%. These declines will impact the demand for infant, preschool, and after-school care.

Figure 1: Change in Number of Children by Age Group, San Mateo County, 2019 to 2023

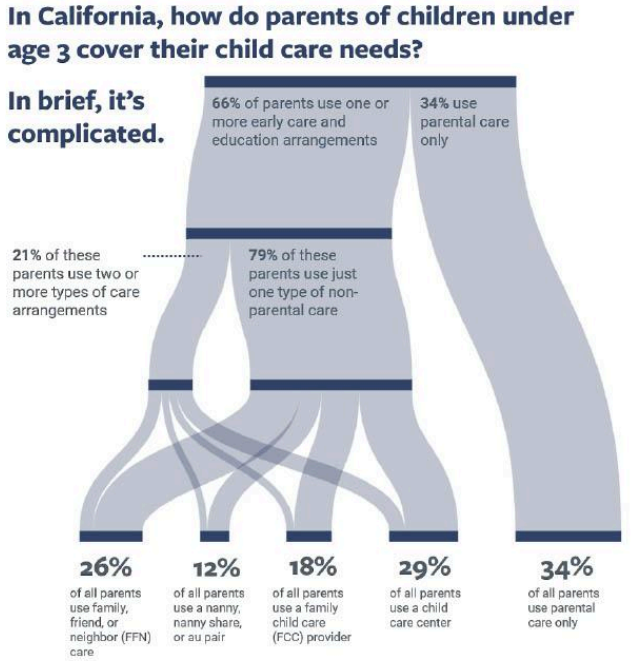


To refine, the estimate of demand for child care, many Local Child Care Planning Councils, for example Santa Clara County[8] and Sacramento County,[9] and the California Resource and Referral Network[10] apply the Labor Force Participation Rate (LFPR) - a measure of the number of children with all parents in the workforce, to determine child care demand in their child care needs assessments. In the *2022 San Mateo County Child Care Needs Assessment*, LFPR was not used; rather a demand factor was applied from a local parent survey. Both of these methodologies may overstate the demand for formal child care.

Figures 2 and **3**, from a recent study from the Center for the Study of Child Care Employment (CSCCE) on parent preferences in Family, Friend, Neighbor, and Nanny Care, illustrate the complex ways that parents in California are covering their child care needs. The variety of child care arrangements made by families complicate efforts to estimate child care demand.

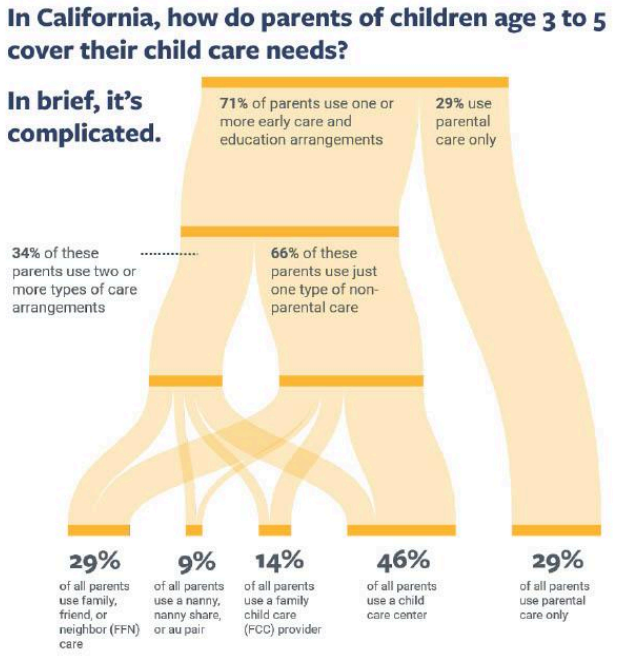
[7] American Community Survey, S0101: Age and Sex, 5-year estimates.
[8] Santa Clara County Office of Education, Santa Clara County 2023 Child Care Needs Assessment.
[9] Sacramento County Office of Education, Sacramento County Child Care Needs Assessment, December 2020.
[10] California Child Care Resource and Referral Network, Child Care Data Tool, Availability of Child Care for Working Families, https://rrnetwork.org/research/child-care-data-tool#!0, retrieved on April 3, 2025.

Figure 2: Child Care Arrangements for Children Under Age 3, California, 2022[11]



Source: Center for the Study of Child Care Employment, University of California, Berkeley
Note: Data were collected in 2022. Bottom row does not sum to 100 percent because some parents use more than one child care arrangement (excluding parent-only care).
N=612

Figure 3: Child Care Arrangements for Children Age 3 to 5, California, 2022



Source: Center for the Study of Child Care Employment, University of California, Berkeley
Note: Data were collected in 2022. Chart does not include hours enrolled in transitional kindergarten or kindergarten. Bottom row does not sum to 100 percent because some parents use more than one child care arrangement (excluding parent-only care).
N=975

[11]Center for the Study of Child Care Employment, Parent Preferences in Family, Friend and Neighbor, and Nanny Care, May 2023.

This analysis seeks to provide a realistic estimate of the demand from families for formal child care by layering several demand factors. First, the LFPR is applied. This assumes that the primary demand for child care comes from working families. Next, the number of children is adjusted by the percentage of families likely to use formal child care. This is a similar methodology to that used by the local planning council in Marin in their child care needs assessment.[12]

Several recent local, state, and national studies have sought to understand parent's usage of child care and can provide a basis for the parent demand factor used in this analysis. Unfortunately, each study asks the parent survey questions in a different manner and uses different age groups of children, making it difficult to apply one metric to estimate demand. The studies are summarized in the following table.

Table 3: Summary of Parent Child Care Use and Preference Surveys

<table>
<tr><th rowspan="2">Study Name</th><th colspan="7">Child Age in Years</th></tr>
<tr><th>0</th><th>1</th><th>2</th><th>3</th><th>4</th><th>5</th><th>6 +</th></tr>
<tr><td>1. Understanding Employed Parents Using Informal Child Care[13]</td><td colspan="5">42% of parents with children under 5 would prefer formal care for youngest child if child care free/convenient</td><td></td><td></td></tr>
<tr><td rowspan="2">2. San Mateo County Fall 2022 Parent Survey Results[14]</td><td colspan="2">35.5% prefer formal care</td><td colspan="3">68.8% prefer formal care</td><td colspan="2">54.0% prefer formal care</td></tr>
<tr><td colspan="2">37.2% currently use formal care</td><td colspan="3">61.2% currently use formal care</td><td colspan="2">46.9% currently use formal care</td></tr>
<tr><td>3. Parent Preferences in Family, Friend, Neighbor, and Nanny Care[15]</td><td colspan="4">47% currently use formal care</td><td colspan="3">60% currently use formal care</td><td></td></tr>
<tr><td>4. 2023 The Big Lift UPK & After School Access Data[16]</td><td></td><td></td><td></td><td></td><td>50% need after school for TK</td><td>62% need after school for K</td><td></td></tr>
<tr><td>5. 4Cs UPK Parent Survey[17]</td><td colspan="6">75% prefer formal setting for early education</td><td></td></tr>
</table>

[12] Marin County Office of Education, Marin County Early Learning and Care Needs Assessment 2018-2019.
[13] Bipartisan Policy Center, Understanding Employed Parents Using Informal Child Care, June 2022.
[14] Brion Economics, San Mateo County Child Care Needs Assessment - 2022.
[15] Center for the Study of Child Care Employment (CSCCE), Parent Preferences in Family, Friend, Neighbor, and Nanny Care, May 2023.
[16] San Mateo County Office of Education, 2023 The Big Lift UPK & After School Access Data.
[17] Child Care Coordinating Council (4Cs), UPK Parent Survey, 2024.

For this analysis, the following demand factors will be applied:

- **Infants under 2 years old: 40%.** This number is between those reported in the San Mateo County Parent Survey and the findings of the CSCCE Parent Survey (see lines 2 and 3 above).
- **Preschool for 2 year olds: 60%.** This number is between those reported in the San Mateo County Parent Survey and the findings of the CSCCE Parent Survey (see lines 2 and 3 above).
- **Preschool for 3 and 4 year olds: 95%.** This sets an ambitious target to bring the County closer to the goal of Universal Preschool and would apply to all children with both working and non-working parents.
- **School Age for 5 years and older: 55%.** This number is between those reported in the San Mateo County Parent Survey and The Big Lift After School Access data (see lines 2 and 4 above).

The expansion of TK in the public schools reduces the demand for preschool and increases the demand for before/after school care for this population. To account for this, the estimated number of children enrolled in TK in the 2025-26 school year is subtracted from the number of 4-year-olds and added to the school age population.

Using this methodology, **Table 4** summarizes the demand for child care for infant, preschool, and school age children in the County.

Table 4: Child Care Demand, San Mateo County, 2025

	Infant	Preschool			School Age				Total
	< 2 yrs	2 yrs	3 - 4 yrs	Total 2 - 4 yrs	5 yrs	6 - 11 yrs	12 yrs	Total 5 - 12 yrs	0 - 12 yrs
Number of children [18]	15,533	7,765	15,532	23,297	7,816	48,748	8,742	65,306	**104,136**
TK enrollment[19]			-3,635	-3,635	3,635			3,635	
Adjusted number of children	15,533	7,765	11,897	19,622	11,451	48,748	8,742	68,941	**104,136**
Labor force participation rate[20]	73.6%	73.6%	73.6%	73.6%	73.6%	75.5%	75.0%		
No. children with all parents working	11,432	5,715	8,756	14,471	8,428	36,805	6,557	51,789	**77,693**
No. 3 and 4 year olds with one or more non-working parent			3,141	3,141					**3,141**
Child Care Demand Factor	40%	60%	95%	95%	55%	55%	55%	55%	
Estimated demand for child care	4,573	3,429	8,318	11,747	4,635	20,243	3,606	28,484	**44,804**
Estimated demand for part-day preschool			2,984	2,984					**2,984**
Total Demand for Child Care & Preschool	**4,573**	3,429	11,302	**14,731**	4,635	20,243	3,606	**28,484**	**47,788**

Surplus or Deficit of Child Care

When the supply of formal child care is compared to the estimated demand, there is **a deficit of 1,403 Infant spaces and 7,501 School Age spaces**. **For Preschool, there is a surplus of 6,019 spaces.** The following table shows supply compared to demand and the surplus or deficit by age group.

[18] American Community Survey, S0101: Age and Sex, 2023, 5-year estimates.
[19] The Center for Learning Analytics at the San Mateo County Office of Education estimates that between 3,326 and 3,942 children will be enrolled in TK in the 2027-28 school year. This analysis takes the average of these two numbers to estimate TK enrollment. San Mateo County Office of Education, San Mateo County TK Enrollment Projections, June 2024. Retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.
[20] American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents, 2023, 5-year estimates.

Table 5: Surplus or Deficit of Child Care, San Mateo County, 2025

	Infant (under 2 years)	Preschool (2 to 4 years)	School Age (5 to 12 years)	Total (0 to 12 years)
Number of Center-based spaces	1,901	18,240	19,275	**39,416**
Number of Family Child Care spaces	1,269	2,510	1,708	**5,487**
Total Spaces	**3,170**	**20,750**	**20,983**	**44,903**
Surplus or Deficit of Spaces	**(1,403)**	**6,019**	**(7,501)**	**(2,885)**
Percent of Demand Met	**69%**	**141%**	**74%**	**94%**

Factors Impacting Child Care Choice

In the fall of 2022, the Center for the Study of Child Care Employment (CSCCE) surveyed 1,310 parents of children under age six in California to better understand their caregiving arrangements. For families in the Bay Area with children under age 3, 29% use parental care only; this drops to 16% of families with children ages 3 to 5.[21] Based on this survey, most families are using some form of non-parental care. In the Bay Area, just 15% of parents with children under age 3 and 24% of parents with children ages 3 to 5 years reported that their current care arrangement is already their ideal.

Many factors affect a family's choices for child care, such as affordability, available openings, schedule of care, quality and location. **Table 6** shows parents' rating of several decision factors from the CSCCE parent survey.[22] Health and safety practices were selected by the greatest number of families as "very important" to their decision. The hours of care was also "very important" to all families. For families with children under 3, many families reported that "it just felt right" was a factor in their decision. For families with children ages 3 to 5, the availability of an opening for their child impacted their decision.

[21]CSCCE, Parent Preferences in Family, Friend, and Nanny Care, May 2023.
[22] Ibid.

Table 6: Child Care Decision Factors

Selection of "Very Important" Decision Factors, Bay Area Region	Parents with children under 3 years	Parents with children 3 to 5 years
Close to home or work	64%	58%
Cost	64%	52%
Cultural background	23%	26%
Hours of care available	76%	68%
Health and safety practices	85%	74%
Learning opportunities	56%	63%
Language(s) spoken	36%	36%
Had an opening for my child	69%	68%
Personal connections/previous relationship	38%	38%
It just felt right	73%	56%
N	*143*	*191*

Some of these decision factors are echoed in the parent survey for San Mateo County from the 2022 needs assessment.[23] In that survey, parents were asked about a number of considerations when searching for child care. The top challenges reported by parents were:

- Affordable care: 65% of respondents indicated this was somewhat or very hard to find
- Able to Enroll Right Away: 53% of respondents indicated this was somewhat or very hard to find
- Desired Schedule: 41% of respondents indicated this was somewhat or very hard to find

A Note About Family-Friend-Neighbor (FFN) Care

While this study is focused on the supply and demand for formal child care, primarily licensed family child care homes and centers, we know that many families in the County have family, friends, or neighbors, paid or unpaid, caring for their children. In 2022, the Center for the Study of Child Care Employment at UC Berkeley, in partnership with the RAPID Survey at Stanford, conducted the California Family,

[23] Brion Economics, Inc. San Mateo County Child Care Needs Assessment – 2022.

Friend, Neighbor (FFN), and Nanny Child Care Study.[24] This study provides some data for the Bay Area Region, which includes San Mateo County, on parents' use of FFN care. In the Bay Area, 23% of families with a child under age 3 and 28% of families with a child age 3 to 5 are using FFN care. An additional 17% of families with a child under 3 and 15% of families with a child age 3 to 5 are using Nanny care. In the Bay Area, 64% of FFN caregivers were a grandparent, 10% were an aunt or uncle, 7% were another family member, 10% were a friend of the family, and 8% were a neighbor.

Table 7: Estimate of FFN and Nanny Child Care, San Mateo County, 2025

	Under 3	3 to 5	Total
Number of children[25]	23,298	23,348	**46,646**
Estimated number of children cared for by FFN[26]	5,359	6,537	**11,896**
Estimated number of children cared for by Nanny[27]	3,961	3,502	**7,463**
Total number of children cared for by informal caregiver	**9,320**	**10,039**	**19,359**
Estimated number of FFN and Nanny caregivers[28]	**4,660**	**5,020**	**9,680**

There are close to 20,000 children between the ages of 0 to 5-years-old being cared for by FFN or nannies in the County, or 42% of the children in this age group.

Subsidized Child Care and Preschool

Subsidized Child Care and Preschool Need

In prior years, the Child Care Partnership Council was able to use the Early Learning Needs Assessment Tool (ELNAT) - a tool available to local planning councils through a subscription service to the American Institutes of Research. However, that tool has not been updated since the 2020 Census, so another data source and proxy to determine need must be used. The American Community Survey from 2023 is the most recent data available, and is used to estimate the need for subsidized child care and preschool. Specifically, estimates of the number of children in families with incomes below a certain percentage of the Federal Poverty Level (FPL) are used to estimate need.

[24] Center for the Study of Child Care Employment, 2022 California Family, Friend, Neighbor (FFN), and Nanny Child Care Study, https://cscce.berkeley.edu/projects/california-ffn-study/.
[25] American Community Survey, S0101: Age and Sex, 2023, 5-year estimates.
[26] In the Bay Area, 23% of families with a child under age 3 and 28% of families with a child age 3 to 5 are using FFN care. These percentages were applied to the number of children to estimate the number cared for by FFN.
[27] An additional 17% of families with a child under 3 and 15% of families with a child age 3 to 5 are using Nanny care. These percentages were applied to the number of children to estimate the number cared for by Nannies.
[28] Assumes two children per FFN or Nanny.

Table 8 compares California State Median Income levels (used for child care and preschool program eligibility) to FPL levels. Income-eligibility varies across state-funded preschool and child care programs. The California State Preschool Program (CSPP) sets income eligibility at 100% of State Median Income (SMI).[29] Child care programs, such as the Alternative Payment Program (APP) and General Child Care (CCTR), that are funded through the California Department of Social Services limit income eligibility to 85% SMI.[30] As shown in **Table 8**, 400% FPL would be lower than the eligibility limit for CSPP for all family sizes. Therefore, 500% FPL is used to estimate the number of subsidy-eligible children, or "need," by age group as shown in **Table 9**.

Table 8: Percentages of State Median Income Compared to Federal Poverty Level

Family Size	State Median Income for FY24-25		Federal Poverty Level, 2023	
	100%	85%	500%	400%
2	$93,108	$79,143	$98,600	$78,880
3	$105,480	$89,660	$124,300	$99,440
4	$122,988	$104,544	$150,000	$120,000

Table 9: Number of Subsidy-Eligible Children (Need), San Mateo County, 2025[31]

Age Group	Number of Children
Infants (0 to 2 years)	9,203
Preschool (3 to 4 years)	6,135
School Age (5 to 12 years)	26,188
All (0 to 12 years)	**41,526**

[29] California Department of Education, Management Bulletin 24-05: Revised State Median Income Ceilings and Income Ranking Table for Fiscal Year 2024–25. CSPP programs have limited allowance to enroll families with incomes up to 115% SMI if all other eligible children have been served.
[30] California Department of Social Services, Child Care Bulletin (CCB) No. 24-12: Revised State Median Income (SMI) Ceilings and Income Ranking Table for Fiscal Year (FY) 2024-25.
[31] Calculated from American Community Survey, S0101: Age and Sex and B17024: Age by Ratio of Income to Poverty Level, 2023, 5-year estimates.

Subsidized Child Care and Preschool Supply

The supply of subsidized child care and preschool includes the following:

- Count of spaces funded through California General Child Care (CCTR), California State Preschool (CSPP), Early Head Start/Head Start, and The Big Lift. Reported by contractors via survey for January 2025.
- Count of children who are currently enrolled and receiving child care through a 4Cs voucher (Alternative Payment Program (APP), CalWORKS Stage 1, 2, and 3), by family residence zip code. Provided by 4Cs via email, January 2025.
- Enrollment in TK in the 2023-24 school year. Provided by California Department of Education. Adjusted to model projected TK enrollment in 2025-26 year.
- Analysis of funding allocations for Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) for FY24-25.

Table 10 summarizes the number of currently funded subsidized spaces by age group.

Table 10: Supply of Subsidized Child Care and Preschool, San Mateo County, 2025

Age Group	Number of Subsidized Spaces
Infants (0 to 2 years olds)	1,138
Preschool (3 to 4 years old)	4,905
School Age (5 to 12 years old)	12,503
Total (0 to 12 years old)	**18,546**

Some subsidized programs report that they are not enrolled to their full capacity primarily due to insufficient staff or experiencing less parent interest than in previous years.[32]

For the CSPP spaces, 76% of contracted spaces are full-day and 24% are part-day.

Summary of Subsidized Child Care Supply and Need

The following table summarizes the deficit of subsidized child care by age group.

[32] Survey of state contracted child care programs, February/March 2025.

Table 11: Deficit of Subsidized Child Care and Preschool, San Mateo County, 2025

Age Group	No. Eligible Children	No. of Funded Spaces	Deficit	% Not Served
Infant/ Toddler (0 to 2 years)	9,203	1,138	(8,065)	88%
Preschool (3 and 4 years)	6,135	4,905	(1,230)	20%
School Age (5 to 12 years)	26,188	12,503	(13,685)	52%
Total (0 to 12 years)	**41,526**	**18,546**	**(22,980)**	**55%**

Since the 2022 needs assessment, there has been an improvement in the percentage of the need being met for all age groups. In 2022, 96% of infants, 48% of preschoolers, and 79% of school age children were not served. Some of the reasons for improvement include: expanded eligibility criteria for CSPP, expansion of TK, and new ELO-P funding. **Appendix 4** provides the Zip Code Priorities for subsidized care that will be presented to the San Mateo County Board of Supervisors on May 20, 2025 for their approval. Priority 1 zip codes have the largest deficits of subsidized care.

4Cs maintains an eligibility list of children and families who are waiting for a child care voucher. **Table 12** shows the number of children living in San Mateo County on the eligibility list, by age group, who are waiting for child care vouchers.[33]

Table 12: San Mateo County Children on Child Care Voucher Eligibility List, 2025

Age Group	Number of Children
Infant/ Toddler (0 to 2 years)	365
Preschool (3 and 4 years)	302
School Age (5 to 12 years)	492
Total (0 to 12 years)	**1,159**

In addition to the 1,159 children who live in San Mateo County, there are an additional 77 children on the eligibility list who live in surrounding counties: 22 infants, 27 preschoolers, and 28 school age children.

In the 4Cs' referral database, 43% of active providers have indicated that they accept subsidies, 15% do not accept subsidies, and the remaining 42% did not provide an

[33] Reported by 4Cs via email, January 2025.

answer to this question on their MyChildCarePlan profile.[34] This indicates that a significant number of providers stand ready to accept subsidies were there additional funding to serve all of the children waiting on the eligibility list.

Conclusion

This report has provided an update on the surplus/deficit of child care for families of all income levels, as well as the need for additional subsidized care. Since 2022, the following factors have impacted child care supply and demand:

- A decreased number of children in the County.
- An increased number of formal child care spaces for all age groups.
- Expansion of Transitional Kindergarten (TK).
- Expansion of the Expanded Learning Opportunities Program (ELO-P) for before/after school and summer and intersession programming.
- Expanded eligibility for the California State Preschool Program (CSPP).

All of these factors interplay with parental consideration of affordability, availability, schedules, quality (health and safety and "just feeling right"), and location to create a new child care landscape in San Mateo County.

Key Findings

The key findings from this updated supply and demand analysis are summarized below.

Affordability

A deficit of subsidized child care exists for all ages of children in families with incomes below 500% of Federal Poverty Level ($150,000 annual income for a family of 4), creating a need for additional funding. The County needs an additional 8,065 subsidized infant spaces, 1,230 additional subsidized preschool spaces, and an additional 13,685 subsidized school age spaces. The majority of new subsidy funding should be directed to subsidizing existing child care programs, making them more affordable for more families.

Supply Gaps for Infants and School Age

An additional 1,403 formal spaces need to be created for infants and 7,501 spaces for school age to meet demand. The cities with the largest deficits of infant spaces are Daly City/Colma, San Mateo, San Bruno, Pacifica, Millbrae, Belmont and Burlingame.

[34] Reported by 4Cs via email, March 2025.

The cities with the largest deficits of school age spaces are Daly City/Colma, San Mateo, San Bruno, Belmont, Foster City, and Burlingame.

Loss of Family Child Care Homes

There are 24% fewer FCCs today than there were in 2017. FCCs are significant providers of infant care in the County, providing 40% of the formal child care spaces for this age group. To address the infant care shortage, the challenges impacting FCC businesses must also be addressed.

Adaptations to a Changing Child Care Market

There appears to be a surplus of 6,019 preschool spaces (equivalent to 250 to 300 classrooms) when compared to demand, due largely to the decrease in the number of children and the increased availability of TK. Resources and support are needed to help preschool programs with a desire to shift to serving either infants/toddlers or before/after school care. These programs will require financial incentives to offset the loss of full-time preschool children, and the lower adult:child ratios and smaller group sizes in infant/toddler programs. They will also need resources for staff training and recruitment, and to modify or adapt facilities and furnishings. Additionally, those providers who desire to pivot to serving younger or older students need resources and support to reconfigure their programs. Preschool programs would also benefit from technical assistance to better understand market-research, advertising, and branding, to understand what parents are seeking in a child care or preschool program and to adapt their programming to today's families.

In conclusion, this report shows a need to advocate and plan for making child care for children of all ages more affordable, addressing the shortage of infant and school age care in communities with supply gaps, addressing the loss of Family Child Care Homes, and supporting programs to adapt to a changing child care market.

Appendix 1:
Child Care Supply and Demand, San Mateo County, 2025

Child Care Supply and Demand, All Families, San Mateo County, 2025
Subsidized Child Care and Preschool, San Mateo County, 2025

Child Care Supply and Demand, All Families, San Mateo County, 2025

SAN MATEO COUNTY PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	15,533	7,765	7,766	7,766	23,297	7,816	48,748	8,742	65,306	104,136
Transitional Kindergarten enrollment	(2)				-3,635	-3,635	3,635			3,635	
Adjusted Number of Children		15,533	7,765	7,766	4,131	19,662	11,451	48,748	8,742	68,941	104,136
Labor Force Participation Rate	(3)	73.6%	73.6%	73.6%	73.6%		73.6%	75.5%	75.0%		
Number of children with all parents in labor force		11,432	5,715	5,716	3,040	14,471	8,428	36,805	6,557	51,789	77,693
Number of 3 and 4 year olds with at least one non-working parent				2,050	1,091	3,141					3,141
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		4,573	3,429	5,430	2,888	11,747	4,635	20,243	3,606	28,484	44,804
Estimated of demand for part-day preschool				1,948	1,036	2,984					2,984
Total Demand for Formal Child Care/Preschool		**4,573**	**3,429**	**7,378**	**3,924**	**14,731**	**4,635**	**20,243**	**3,606**	**28,484**	**47,788**
SUPPLY											
Number of Center-Based Spaces	(5)	1,901				18,240				19,275	39,416
Number of Family Child Care Spaces	(6)	1,269				2,510				1,708	5,487
Total Child Care Spaces		**3,170**				**20,750**				**20,983**	**44,903**
SURPLUS/DEFICIT		**(1,403)**				**6,019**				**(7,501)**	**(2,885)**
Percentage of Demand Met		**69%**				**141%**				**74%**	**94%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) The Center for Learning Analytics at the San Mateo County Office of Education estimates that between 3,326 and 3,942 children will be enrolled in TK in the 2027-28 school year. This analysis takes the average of these two numbers to estimate TK enrollment. San Mateo County Office of Education, San Mateo County TK Enrollment Projections, June 2024. Retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SAN MATEO COUNTY PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	23,298	15,532	65,306	104,136
Percent below 500% Federal Poverty Level (FPL)	(2)	39.5%	39.5%	40.1%	39.9%
Estimated number of children eligible for subsidized care		**9,203**	**6,135**	**26,188**	**41,526**
SUPPLY					
Count of Voucher Enrollment	(3)	426	428	840	1,694
Number of Contractor Spaces	(4)	712	4,477	11,663	16,852
Total Subsidized Child Care Spaces		**1,138**	**4,905**	**12,503**	**18,546**
SURPLUS/DEFICIT		**(8,065)**	**(1,230)**	**(13,685)**	**(22,980)**
Percentage of Need Met		**12%**	**80%**	**48%**	**45%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Appendix 2:
Child Care Supply and Demand, City Profiles, 2025

Atherton, Child Care Supply and Demand, All Families, 2025
Atherton, Subsidized Child Care and Preschool, 2025
Belmont, Child Care Supply and Demand, All Families, 2025
Belmont, Subsidized Child Care and Preschool, 2025
Brisbane, Child Care Supply and Demand, All Families, 2025
Brisbane, Subsidized Child Care and Preschool, 2025
Burlingame, Child Care Supply and Demand, All Families, 2025
Burlingame, Subsidized Child Care and Preschool, 2025
Daly City / Colma, Child Care Supply and Demand, All Families, 2025
Daly City / Colma, Subsidized Child Care and Preschool, 2025
East Palo Alto, Child Care Supply and Demand, All Families, 2025
East Palo Alto, Subsidized Child Care and Preschool, 2025
Foster City, Child Care Supply and Demand, All Families, 2025
Foster City, Subsidized Child Care and Preschool, 2025
Half Moon Bay Region, Child Care Supply and Demand, All Families, 2025
Half Moon Bay Region, Subsidized Child Care and Preschool, 2025
Hillsborough, Child Care Supply and Demand, All Families, 2025
Hillsborough, Subsidized Child Care and Preschool, 2025
Menlo Park, Child Care Supply and Demand, All Families, 2025
Menlo Park, Subsidized Child Care and Preschool, 2025
Millbrae, Child Care Supply and Demand, All Families, 2025
Millbrae, Subsidized Child Care and Preschool, 2025
Pacifica, Child Care Supply and Demand, All Families, 2025
Pacifica, Subsidized Child Care and Preschool, 2025
Portola Valley, Child Care Supply and Demand, All Families, 2025
Portola Valley, Subsidized Child Care and Preschool, 2025
Redwood City, Child Care Supply and Demand, All Families, 2025
Redwood City, Subsidized Child Care and Preschool, 2025
San Bruno, Child Care Supply and Demand, All Families, 2025
San Bruno, Subsidized Child Care and Preschool, 2025
San Carlos, Child Care Supply and Demand, All Families, 2025
San Carlos, Subsidized Child Care and Preschool, 2025
San Mateo, Child Care Supply and Demand, All Families, 2025
San Mateo, Subsidized Child Care and Preschool, 2025
South Coast Region, Child Care Supply and Demand, All Families, 2025
South Coast Region, Subsidized Child Care and Preschool, 2025
South San Francisco, Child Care Supply and Demand, All Families, 2025
South San Francisco, Subsidized Child Care and Preschool, 2025
Woodside, Child Care Supply and Demand, All Families, 2025
Woodside, Subsidized Child Care and Preschool, 2025

Child Care Supply and Demand, All Families, San Mateo County, 2025

ATHERTON PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	55	28	28	28	83	34	374	118	526	664
Transitional Kindergarten enrollment	(2)				0	0	0			0	
Adjusted Number of Children		55	28	28	28	83	34	374	118	526	664
Labor Force Participation Rate	(3)	71.7%	71.7%	71.7%	71.7%		71.7%	43.9%	43.9%		
Number of children with all parents in labor force		40	20	20	20	59	25	164	52	240	339
Number of 3 and 4 year olds with at least one non-working parent				8	8	16					16
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		16	12	19	19	49	14	90	28	132	198
Estimated of demand for part-day preschool				7	7	15					15
Total Demand for Formal Child Care/Preschool		**16**	**12**	**26**	**26**	**64**	**14**	**90**	**28**	**132**	**212**
SUPPLY											
Number of Center-Based Spaces	(5)	24				266				60	350
Number of Family Child Care Spaces	(6)	3				6				5	14
Total Child Care Spaces		**27**				**272**				**65**	**364**
SURPLUS/DEFICIT		**11**				**208**				**(67)**	**152**
Percentage of Demand Met		**171%**				**423%**				**49%**	**171%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) There are four elementary schools with an Atherton address. Their TK enrollment is being included as follows: Las Lomitas Elementary, Encinal Elementary, and Laurel Elementary are being included in the Menlo Park profile; Adelante Selby Lane is being included in the Redwood City profile.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education. 148 preschool spaces with an Atherton address are being counted elsewhere: 98 spaces in Menlo Park and 50 spaces in Redwood City. 676 licensed school age spaces are being counted in Menlo Park. 400 license-exempt spaces are being counted in Redwood City.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

ATHERTON PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	83	55	526	664
Percent below 500% Federal Poverty Level (FPL)	(2)	16.4%	16.4%	16.9%	16.8%
Estimated number of children eligible for subsidized care		**14**	**9**	**89**	**112**
SUPPLY					
Count of Voucher Enrollment	(3)	0	0	0	0
Number of Contractor Spaces	(4)	0	0	0	0
Total Subsidized Child Care Spaces		**0**	**0**	**0**	**0**
SURPLUS/DEFICIT		**(14)**	**(9)**	**(89)**	**(112)**
Percentage of Need Met		**0%**	**0%**	**0%**	**0%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) 416 spaces with an Atherton address are being counted elsewhere: 72 infant, 72 preschool and 200 school age spaces in Redwood City; 72 school age in Menlo Park.

Child Care Supply and Demand, All Families, San Mateo County, 2025

BELMONT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	564	282	282	282	847	322	2,067	390	2,779	4,190
Transitional Kindergarten enrollment	(2)				-119	-119	119			119	
Adjusted Number of Children		564	282	282	163	727	441	2,067	390	2,898	4,190
Labor Force Participation Rate	(3)	78.3%	78.3%	78.3%	78.3%		78.3%	82.2%	82.2%		
Number of children with all parents in labor force		442	221	221	128	569	345	1,700	321	2,366	3,377
Number of 3 and 4 year olds with at least one non-working parent			4	61	35	97					97
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		177	133	210	121	464	190	935	177	1,301	1,942
Estimated of demand for part-day preschool				58	34	92					92
Total Demand for Formal Child Care/Preschool		**177**	**133**	**268**	**155**	**555**	**190**	**935**	**177**	**1,301**	**2,033**
SUPPLY											
Number of Center-Based Spaces	(5)	39				612				595	1,246
Number of Family Child Care Spaces	(6)	28				56				36	120
Total Child Care Spaces		**67**				**668**				**631**	**1,366**
SURPLUS/DEFICIT		**(110)**				**113**				**(670)**	**(667)**
Percentage of Demand Met		**38%**				**120%**				**48%**	**67%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Belmont-Redwood Shores Elementary Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

BELMONT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	847	564	2,779	4,190
Percent below 500% Federal Poverty Level (FPL)	(2)	25.0%	25.0%	18.0%	20.3%
Estimated number of children eligible for subsidized care		**212**	**141**	**500**	**852**
SUPPLY					
Count of Voucher Enrollment	(3)	13	16	34	63
Number of Contractor Spaces	(4)	3	34	219	255
Total Subsidized Child Care Spaces		**16**	**50**	**253**	**318**
SURPLUS/DEFICIT		**(196)**	**(91)**	**(247)**	**(534)**
Percentage of Need Met		**8%**	**35%**	**51%**	**37%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

BRISBANE PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	118	59	59	59	176	55	332	55	443	737
Transitional Kindergarten enrollment	(2)				0	0	0			0	
Adjusted Number of Children		118	59	59	59	176	55	332	55	443	737
Labor Force Participation Rate	(3)	59.3%	59.3%	59.3%	59.3%		59.3%	95.3%	95.3%		
Number of children with all parents in labor force		70	35	35	35	105	33	317	53	402	577
Number of 3 and 4 year olds with at least one non-working parent				24	24	48					48
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		28	21	33	33	87	18	174	29	221	336
Estimated of demand for part-day preschool				23	23	45					45
Total Demand for Formal Child Care/Preschool		**28**	**21**	**56**	**56**	**133**	**18**	**174**	**29**	**221**	**382**
SUPPLY											
Number of Center-Based Spaces	(5)	0				48				120	168
Number of Family Child Care Spaces	(6)	3				6				5	14
Total Child Care Spaces		**3**				**54**				**125**	**182**
SURPLUS/DEFICIT		**(25)**				**(79)**				**(96)**	**(200)**
Percentage of Demand Met		**11%**				**41%**				**56%**	**48%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Brisbane Elementary Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

BRISBANE PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	176	118	443	737
Percent below 500% Federal Poverty Level (FPL)	(2)	56.0%	56.0%	60.2%	58.5%
Estimated number of children eligible for subsidized care		**99**	**66**	**267**	**432**
SUPPLY					
Count of Voucher Enrollment	(3)	1	0	0	1
Number of Contractor Spaces	(4)	0	0	32	32
Total Subsidized Child Care Spaces		**1**	**0**	**32**	**33**
SURPLUS/DEFICIT		**(98)**	**(66)**	**(235)**	**(398)**
Percentage of Need Met		**1%**	**0%**	**12%**	**8%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

BURLINGAME PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	741	370	370	370	1,110	360	2,300	429	3,090	4,941
Transitional Kindergarten enrollment	(2)				-235	-235	235			235	
Adjusted Number of Children		741	370	370	135	875	596	2,300	429	3,325	4,941
Labor Force Participation Rate	(3)	74.3%	74.3%	74.3%	74.3%		74.3%	75.1%	75.1%		
Number of children with all parents in labor force		550	275	275	100	650	442	1,727	322	2,492	3,692
Number of 3 and 4 year olds with at least one non-working parent				95	35	130					130
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		220	165	261	95	521	243	950	177	1,370	2,112
Estimated of demand for part-day preschool				90	33	123					123
Total Demand for Formal Child Care/Preschool		**220**	**165**	**352**	**128**	**644**	**243**	**950**	**177**	**1,370**	**2,235**
SUPPLY											
Number of Center-Based Spaces	(5)	72				1,077				809	1,958
Number of Family Child Care Spaces	(6)	44				88				56	188
Total Child Care Spaces		**116**				**1,165**				**865**	**2,146**
SURPLUS/DEFICIT		**(104)**				**521**				**(505)**	**(89)**
Percentage of Demand Met		**53%**				**181%**				**63%**	**96%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Burlingame Elementary Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

BURLINGAME PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,111	740	3,090	4,941
Percent below 500% Federal Poverty Level (FPL)	(2)	17.4%	17.4%	30.1%	25.3%
Estimated number of children eligible for subsidized care		**193**	**129**	**930**	**1,251**
SUPPLY					
Count of Voucher Enrollment	(3)	7	17	23	47
Number of Contractor Spaces	(4)	15	60	254	329
Total Subsidized Child Care Spaces		**22**	**77**	**277**	**376**
SURPLUS/DEFICIT		**(171)**	**(52)**	**(653)**	**(875)**
Percentage of Need Met		**11%**	**60%**	**30%**	**30%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

DALY CITY & COLMA PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	1,853	927	927	927	2,780	918	5,578	952	7,449	12,082
Transitional Kindergarten enrollment	(2)				-409	-409	409			409	
Adjusted Number of Children		1,853	927	927	518	2,371	1,327	5,578	952	7,858	12,082
Labor Force Participation Rate	(3)	76.4%	76.4%	76.4%	76.4%		76.4%	81.6%	81.6%		
Number of children with all parents in labor force		1,416	708	708	395	1,811	1,014	4,553	777	6,345	9,572
Number of 3 and 4 year olds with at least one non-working parent				219	122	341					341
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		566	425	672	376	1,473	558	2,504	428	3,490	5,529
Estimated of demand for part-day preschool				208	116	324					324
Total Demand for Formal Child Care/Preschool		**566**	**425**	**880**	**492**	**1,797**	**558**	**2,504**	**428**	**3,490**	**5,853**
SUPPLY											
Number of Center-Based Spaces	(5)	128				1,279				1,883	3,290
Number of Family Child Care Spaces	(6)	117				228				141	486
Total Child Care Spaces		**245**				**1,507**				**2,024**	**3,776**
SURPLUS/DEFICIT		**(321)**				**(290)**				**(1,466)**	**(2,077)**
Percentage of Demand Met		**43%**				**84%**				**58%**	**65%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade Report. Elementary schools included for Daly City & Colma are: Jefferson, Skyline, Bayshore and Panorama. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

DALY CITY & COLMA PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	2,780	1,853	7,449	12,082
Percent below 500% Federal Poverty Level (FPL)	(2)	63.4%	63.4%	60.5%	61.6%
Estimated number of children eligible for subsidized care		**1,763**	**1,175**	**4,507**	**7,445**
SUPPLY					
Count of Voucher Enrollment	(3)	53	51	71	175
Number of Contractor Spaces	(4)	56	513	1,805	2,374
Total Subsidized Child Care Spaces		**109**	**564**	**1,876**	**2,549**
SURPLUS/DEFICIT		**(1,654)**	**(611)**	**(2,631)**	**(4,896)**
Percentage of Need Met		**6%**	**48%**	**42%**	**34%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

EAST PALO ALTO PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	661	331	331	331	992	331	2,018	347	2,696	4,349
Transitional Kindergarten enrollment	(2)				-100	-100	100			100	
Adjusted Number of Children		661	331	331	231	892	431	2,018	347	2,796	4,349
Labor Force Participation Rate	(3)	63.2%	63.2%	63.2%	63.2%		63.2%	74.1%	74.1%		
Number of children with all parents in labor force		418	209	209	146	564	273	1,496	257	2,026	3,008
Number of 3 and 4 year olds with at least one non-working parent				122	85	206					206
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		167	125	199	139	463	150	823	141	1,114	1,744
Estimated of demand for part-day preschool				115	81	196					196
Total Demand for Formal Child Care/Preschool		**167**	**125**	**314**	**219**	**659**	**150**	**823**	**141**	**1,114**	**1,940**
SUPPLY											
Number of Center-Based Spaces	(5)	20				714				1,059	1,793
Number of Family Child Care Spaces	(6)	67				134				105	306
Total Child Care Spaces		**87**				**848**				**1,164**	**2,099**
SURPLUS/DEFICIT		**(80)**				**189**				**50**	**159**
Percentage of Demand Met		**52%**				**129%**				**104%**	**108%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Ravenswood City School District Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

EAST PALO ALTO PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	992	661	2,696	4,349
Percent below 500% Federal Poverty Level (FPL)	(2)	92.7%	92.7%	84.8%	87.8%
Estimated number of children eligible for subsidized care		**920**	**613**	**2,287**	**3,820**
SUPPLY					
Count of Voucher Enrollment	(3)	52	47	119	218
Number of Contractor Spaces	(4)	18	368	1,059	1,444
Total Subsidized Child Care Spaces		**70**	**415**	**1,178**	**1,662**
SURPLUS/DEFICIT		**(850)**	**(198)**	**(1,109)**	**(2,158)**
Percentage of Need Met		**8%**	**68%**	**51%**	**44%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

FOSTER CITY PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	796	398	398	398	1,193	409	2,464	415	3,288	5,277
Transitional Kindergarten enrollment	(2)				-205	-205	205			205	
Adjusted Number of Children		796	398	398	192	988	614	2,464	415	3,493	5,277
Labor Force Participation Rate	(3)	64.7%	64.7%	64.7%	64.7%		64.7%	78.7%	78.7%		
Number of children with all parents in labor force		514	257	257	124	639	397	1,939	326	2,662	3,815
Number of 3 and 4 year olds with at least one non-working parent				141	68	209					209
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		206	154	244	118	517	218	1,066	179	1,464	2,187
Estimated of demand for part-day preschool				134	65	198					198
Total Demand for Formal Child Care/Preschool		**206**	**154**	**378**	**183**	**715**	**218**	**1,066**	**179**	**1,464**	**2,385**
SUPPLY											
Number of Center-Based Spaces	(5)	149				931				813	1,893
Number of Family Child Care Spaces	(6)	81				162				119	362
Total Child Care Spaces		**230**				**1,093**				**932**	**2,255**
SURPLUS/DEFICIT		**24**				**378**				**(532)**	**(130)**
Percentage of Demand Met		**112%**				**153%**				**64%**	**95%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, San Mateo-Foster City Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

FOSTER CITY PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,193	796	3,288	5,277
Percent below 500% Federal Poverty Level (FPL)	(2)	19.7%	19.7%	18.9%	19.2%
Estimated number of children eligible for subsidized care		**235**	**157**	**623**	**1,014**
SUPPLY					
Count of Voucher Enrollment	(3)	15	15	26	56
Number of Contractor Spaces	(4)	0	51	290	341
Total Subsidized Child Care Spaces		**15**	**66**	**316**	**397**
SURPLUS/DEFICIT		**(220)**	**(90)**	**(307)**	**(617)**
Percentage of Need Met		**6%**	**42%**	**51%**	**39%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

HALF MOON BAY REGION PROFILE*		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	467	234	234	234	701	233	1,451	260	1,943	3,111
Transitional Kindergarten enrollment	(2)				-109	-109	109			109	
Adjusted Number of Children		467	234	234	125	592	342	1,451	260	2,052	3,111
Labor Force Participation Rate	(3)	75.8%	75.8%	75.8%	75.8%		75.8%	77.7%	77.7%		
Number of children with all parents in labor force		354	177	177	95	448	259	1,127	202	1,587	2,390
Number of 3 and 4 year olds with at least one non-working parent				57	30	87					87
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		142	106	168	90	364	142	620	111	873	1,379
Estimated of demand for part-day preschool				54	29	83					83
Total Demand for Formal Child Care/Preschool		**142**	**106**	**222**	**119**	**447**	**142**	**620**	**111**	**873**	**1,461**
SUPPLY											
Number of Center-Based Spaces	(5)	36				320				461	817
Number of Family Child Care Spaces	(6)	18				36				22	76
Total Child Care Spaces		**54**				**356**				**483**	**893**
SURPLUS/DEFICIT		**(88)**				**(91)**				**(390)**	**(568)**
Percentage of Demand Met		**38%**				**80%**				**55%**	**61%**

* *Half Moon Bay Region includes: El Granada, Half Moon Bay, Montara and Moss Beach.*

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Cabrillo Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

HALF MOON BAY REGION PROFILE*		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	701	467	1,943	3,111
Percent below 500% Federal Poverty Level (FPL)	(2)	48.1%	48.1%	58.2%	54.4%
Estimated number of children eligible for subsidized care		**337**	**225**	**1,132**	**1,694**
SUPPLY					
Count of Voucher Enrollment	(3)	5	3	11	19
Number of Contractor Spaces	(4)	44	216	437	697
Total Subsidized Child Care Spaces		**49**	**219**	**448**	**716**
SURPLUS/DEFICIT		**(288)**	**(5)**	**(684)**	**(978)**
Percentage of Need Met		**15%**	**98%**	**40%**	**42%**

* *Half Moon Bay Region includes: El Granada, Half Moon Bay, Montara and Moss Beach.*

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

HILLSBOROUGH PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	190	95	95	95	286	169	1,129	226	1,524	2,000
Transitional Kindergarten enrollment	(2)				-44	-44	44			44	
Adjusted Number of Children		190	95	95	51	242	213	1,129	226	1,568	2,000
Labor Force Participation Rate	(3)	69.3%	69.3%	69.3%	69.3%		69.3%	52.3%	52.3%		
Number of children with all parents in labor force		132	66	66	36	168	148	591	118	857	1,157
Number of 3 and 4 year olds with at least one non-working parent				29	16	45					45
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		53	40	63	34	136	81	325	65	471	660
Estimated of demand for part-day preschool				28	15	43					43
Total Demand for Formal Child Care/Preschool		**53**	**40**	**90**	**49**	**179**	**81**	**325**	**65**	**471**	**703**
SUPPLY											
Number of Center-Based Spaces	(5)	0				99				60	159
Number of Family Child Care Spaces	(6)	3				6				5	14
Total Child Care Spaces		**3**				**105**				**65**	**173**
SURPLUS/DEFICIT		**(50)**				**(74)**				**(406)**	**(530)**
Percentage of Demand Met		**6%**				**59%**				**14%**	**25%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Hillsborough Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

HILLSBOROUGH PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	286	190	1,524	2,000
Percent below 500% Federal Poverty Level (FPL)	(2)	15.5%	15.5%	23.6%	21.7%
Estimated number of children eligible for subsidized care		**44**	**30**	**360**	**434**
SUPPLY					
Count of Voucher Enrollment	(3)	0	0	0	0
Number of Contractor Spaces	(4)	0	7	15	22
Total Subsidized Child Care Spaces		**0**	**7**	**15**	**22**
SURPLUS/DEFICIT		**(44)**	**(23)**	**(345)**	**(412)**
Percentage of Need Met		**0%**	**23%**	**4%**	**5%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

MENLO PARK PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	1,039	519	519	519	1,558	537	3,104	479	4,119	6,716
Transitional Kindergarten enrollment	(2)				-433	-433	433			433	
Adjusted Number of Children		1,039	519	519	86	1,125	970	3,104	479	4,552	6,716
Labor Force Participation Rate	(3)	63.7%	63.7%	63.7%	63.7%		63.7%	69.5%	69.5%		
Number of children with all parents in labor force		661	331	331	55	716	618	2,156	332	3,106	4,483
Number of 3 and 4 year olds with at least one non-working parent				189	31	220					220
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		265	198	314	52	565	340	1,186	183	1,708	2,537
Estimated of demand for part-day preschool				179	30	209					209
Total Demand for Formal Child Care/Preschool		**265**	**198**	**493**	**82**	**773**	**340**	**1,186**	**183**	**1,708**	**2,746**
SUPPLY											
Number of Center-Based Spaces	(5)	123				1,581				1,640	3,344
Number of Family Child Care Spaces	(6)	55				110				65	230
Total Child Care Spaces		**178**				**1,691**				**1,705**	**3,574**
SURPLUS/DEFICIT		**(87)**				**918**				**(3)**	**828**
Percentage of Demand Met		**67%**				**219%**				**100%**	**130%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Las Lomitas, Menlo Park, Ravenswood and Redwood City Reports. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

MENLO PARK PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,558	1,039	4,119	6,716
Percent below 500% Federal Poverty Level (FPL)	(2)	27.6%	27.6%	12.8%	18.5%
Estimated number of children eligible for subsidized care		**430**	**287**	**526**	**1,244**
SUPPLY					
Count of Voucher Enrollment	(3)	20	23	36	79
Number of Contractor Spaces	(4)	35	446	952	1,433
Total Subsidized Child Care Spaces		**55**	**469**	**988**	**1,512**
SURPLUS/DEFICIT		**(375)**	**182**	**462**	**269**
Percentage of Need Met		**13%**	**163%**	**188%**	**122%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

MILLBRAE PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	508	254	254	254	762	180	1,177	229	1,586	2,856
Transitional Kindergarten enrollment	(2)				-74	-74	74			74	
Adjusted Number of Children		508	254	254	180	688	254	1,177	229	1,660	2,856
Labor Force Participation Rate	(3)	72.6%	72.6%	72.6%	72.6%		72.6%	82.7%	82.7%		
Number of children with all parents in labor force		369	185	185	131	500	184	973	189	1,347	2,216
Number of 3 and 4 year olds with at least one non-working parent				69	49	119					119
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		148	111	175	124	410	101	535	104	741	1,299
Estimated of demand for part-day preschool				66	47	113					113
Total Demand for Formal Child Care/Preschool		**148**	**111**	**241**	**171**	**523**	**101**	**535**	**104**	**741**	**1,412**
SUPPLY											
Number of Center-Based Spaces	(5)	0				352				260	612
Number of Family Child Care Spaces	(6)	36				72				44	152
Total Child Care Spaces		**36**				**424**				**304**	**764**
SURPLUS/DEFICIT		**(112)**				**(99)**				**(437)**	**(648)**
Percentage of Demand Met		**24%**				**81%**				**41%**	**54%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Millbrae Elementary Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

MILLBRAE PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	762	508	1,586	2,856
Percent below 500% Federal Poverty Level (FPL)	(2)	29.9%	29.9%	34.3%	32.3%
Estimated number of children eligible for subsidized care		**228**	**152**	**545**	**924**
SUPPLY					
Count of Voucher Enrollment	(3)	8	13	15	36
Number of Contractor Spaces	(4)	6	36	260	302
Total Subsidized Child Care Spaces		**14**	**49**	**275**	**338**
SURPLUS/DEFICIT		**(214)**	**(103)**	**(270)**	**(586)**
Percentage of Need Met		**6%**	**32%**	**50%**	**37%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

PACIFICA PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	716	358	358	358	1,075	340	2,183	411	2,934	4,725
Transitional Kindergarten enrollment	(2)				-176	-176	176			176	
Adjusted Number of Children		716	358	358	183	899	516	2,183	411	3,109	4,725
Labor Force Participation Rate	(3)	79.3%	79.3%	79.3%	79.3%		79.3%	79.3%	79.3%		
Number of children with all parents in labor force		568	284	284	145	713	409	1,731	326	2,465	3,746
Number of 3 and 4 year olds with at least one non-working parent				74	38	112					112
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		227	170	270	138	578	225	952	179	1,356	2,161
Estimated of demand for part-day preschool				71	36	107					107
Total Demand for Formal Child Care/Preschool		**227**	**170**	**340**	**174**	**684**	**225**	**952**	**179**	**1,356**	**2,267**
SUPPLY											
Number of Center-Based Spaces	(5)	34				636				989	1,659
Number of Family Child Care Spaces	(6)	45				90				67	202
Total Child Care Spaces		**79**				**726**				**1,056**	**1,861**
SURPLUS/DEFICIT		**(148)**				**42**				**(300)**	**(406)**
Percentage of Demand Met		**35%**				**106%**				**78%**	**82%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Pacifica Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

PACIFICA PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,075	716	2,934	4,725
Percent below 500% Federal Poverty Level (FPL)	(2)	39.0%	39.0%	44.5%	42.4%
Estimated number of children eligible for subsidized care		**419**	**280**	**1,306**	**2,005**
SUPPLY					
Count of Voucher Enrollment	(3)	13	15	20	48
Number of Contractor Spaces	(4)	76	150	198	424
Total Subsidized Child Care Spaces		**89**	**165**	**218**	**472**
SURPLUS/DEFICIT		**(330)**	**(115)**	**(1,087)**	**(1,533)**
Percentage of Need Met		**21%**	**59%**	**17%**	**24%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

PORTOLA VALLEY PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	128	64	64	64	192	68	374	52	494	814
Transitional Kindergarten enrollment	(2)				-72	-72	72			72	
Adjusted Number of Children		128	64	64	-8	120	140	374	52	566	814
Labor Force Participation Rate	(3)	70.0%	70.0%	70.0%	70.0%		70.0%	38.5%	38.5%		
Number of children with all parents in labor force		90	45	45	-6	84	98	144	20	262	435
Number of 3 and 4 year olds with at least one non-working parent				19	-2	17					17
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		36	27	43	-5	64	54	79	11	144	244
Estimated of demand for part-day preschool				18	-2	16					16
Total Demand for Formal Child Care/Preschool		**36**	**27**	**61**	**-8**	**80**	**54**	**79**	**11**	**144**	**260**
SUPPLY											
Number of Center-Based Spaces	(5)	0				204				40	244
Number of Family Child Care Spaces	(6)	0				0				0	0
Total Child Care Spaces		**0**				**204**				**40**	**244**
SURPLUS/DEFICIT		**(36)**				**124**				**(104)**	**(16)**
Percentage of Demand Met		**0%**				**255%**				**28%**	**94%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Portola Valley Elementary Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

PORTOLA VALLEY PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	192	128	494	814
Percent below 500% Federal Poverty Level (FPL)	(2)	5.4%	5.4%	0.0%	2.1%
Estimated number of children eligible for subsidized care		**10**	**7**	**0**	**17**
SUPPLY					
Count of Voucher Enrollment	(3)	1	1	1	3
Number of Contractor Spaces	(4)	0	4	14	18
Total Subsidized Child Care Spaces		**1**	**5**	**15**	**21**
SURPLUS/DEFICIT		**(9)**	**(2)**	**15**	**3**
Percentage of Need Met		**10%**	**71%**	**100%**	**119%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

REDWOOD CITY PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	2,395	1,198	1,198	1,198	3,593	1,234	7,676	1,370	10,279	16,267
Transitional Kindergarten enrollment	(2)				-570	-570	570			570	
Adjusted Number of Children		2,395	1,198	1,198	627	3,023	1,804	7,676	1,370	10,850	16,267
Labor Force Participation Rate	(3)	68.8%	68.8%	68.8%	68.8%		68.8%	73.6%	73.6%		
Number of children with all parents in labor force		1,649	824	824	432	2,080	1,242	5,652	1,009	7,903	11,632
Number of 3 and 4 year olds with at least one non-working parent				373	196	569					569
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		659	495	783	410	1,688	683	3,109	555	4,347	6,694
Estimated of demand for part-day preschool				355	186	540					540
Total Demand for Formal Child Care/Preschool		**659**	**495**	**1,138**	**596**	**2,228**	**683**	**3,109**	**555**	**4,347**	**7,234**
SUPPLY											
Number of Center-Based Spaces	(5)	429				2,359				3,670	6,458
Number of Family Child Care Spaces	(6)	239				471				317	1,027
Total Child Care Spaces		**668**				**2,830**				**3,987**	**7,485**
SURPLUS/DEFICIT		**9**				**602**				**(360)**	**251**
Percentage of Demand Met		**101%**				**127%**				**92%**	**103%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Belmont-Redwood Shores Elementary and Redwood City Elementary Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

REDWOOD CITY PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	3,593	2,395	10,279	16,267
Percent below 500% Federal Poverty Level (FPL)	(2)	46.9%	46.9%	45.1%	45.8%
Estimated number of children eligible for subsidized care		**1,685**	**1,123**	**4,640**	**7,448**
SUPPLY					
Count of Voucher Enrollment	(3)	80	81	138	299
Number of Contractor Spaces	(4)	299	743	3,099	4,141
Total Subsidized Child Care Spaces		**379**	**824**	**3,237**	**4,440**
SURPLUS/DEFICIT		**(1,306)**	**(299)**	**(1,403)**	**(3,008)**
Percentage of Need Met		**22%**	**73%**	**70%**	**60%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SAN BRUNO PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	794	397	397	397	1,192	389	2,506	475	3,370	5,356
Transitional Kindergarten enrollment	(2)				-218	-218	218			218	
Adjusted Number of Children		794	397	397	180	974	607	2,506	475	3,587	5,356
Labor Force Participation Rate	(3)	80.4%	80.4%	80.4%	80.4%		80.4%	80.7%	80.7%		
Number of children with all parents in labor force		638	319	319	144	783	488	2,023	383	2,893	4,315
Number of 3 and 4 year olds with at least one non-working parent				78	35	113					113
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		255	192	303	137	632	268	1,112	211	1,591	2,479
Estimated of demand for part-day preschool				74	33	108					108
Total Demand for Formal Child Care/Preschool		**255**	**192**	**377**	**171**	**739**	**268**	**1,112**	**211**	**1,591**	**2,586**
SUPPLY											
Number of Center-Based Spaces	(5)	20				1,220				609	1,849
Number of Family Child Care Spaces	(6)	70				137				93	300
Total Child Care Spaces		**90**				**1,357**				**702**	**2,149**
SURPLUS/DEFICIT		**(165)**				**618**				**(889)**	**(437)**
Percentage of Demand Met		**35%**				**184%**				**44%**	**83%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Millbrae, San Bruno and South San Francisco Reports. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SAN BRUNO PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,192	794	3,370	5,356
Percent below 500% Federal Poverty Level (FPL)	(2)	42.7%	42.7%	54.3%	50.0%
Estimated number of children eligible for subsidized care		**508**	**339**	**1,831**	**2,678**
SUPPLY					
Count of Voucher Enrollment	(3)	20	21	53	94
Number of Contractor Spaces	(4)	28	261	606	895
Total Subsidized Child Care Spaces		**48**	**282**	**659**	**989**
SURPLUS/DEFICIT		**(460)**	**(57)**	**(1,172)**	**(1,689)**
Percentage of Need Met		**9%**	**83%**	**36%**	**37%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SAN CARLOS PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	639	319	319	319	958	421	2,571	443	3,435	5,032
Transitional Kindergarten enrollment	(2)				-244	-244	244			244	
Adjusted Number of Children		639	319	319	75	714	665	2,571	443	3,679	5,032
Labor Force Participation Rate	(3)	77.1%	77.1%	77.1%	77.1%		77.1%	79.8%	79.8%		
Number of children with all parents in labor force		492	246	246	58	550	513	2,053	354	2,919	3,962
Number of 3 and 4 year olds with at least one non-working parent				73	17	91					91
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		197	148	234	55	437	282	1,129	194	1,606	2,239
Estimated of demand for part-day preschool				70	16	86					86
Total Demand for Formal Child Care/Preschool		**197**	**148**	**303**	**72**	**523**	**282**	**1,129**	**194**	**1,606**	**2,325**
SUPPLY											
Number of Center-Based Spaces	(5)	100				920				1,138	2,158
Number of Family Child Care Spaces	(6)	35				70				49	154
Total Child Care Spaces		**135**				**990**				**1,187**	**2,312**
SURPLUS/DEFICIT		**(62)**				**467**				**(419)**	**(13)**
Percentage of Demand Met		**69%**				**189%**				**74%**	**99%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, San Carlos Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SAN CARLOS PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	958	639	3,435	5,032
Percent below 500% Federal Poverty Level (FPL)	(2)	15.0%	15.0%	14.4%	14.6%
Estimated number of children eligible for subsidized care		**144**	**96**	**495**	**735**
SUPPLY					
Count of Voucher Enrollment	(3)	7	5	13	25
Number of Contractor Spaces	(4)	0	45	138	182
Total Subsidized Child Care Spaces		**7**	**50**	**151**	**207**
SURPLUS/DEFICIT		**(137)**	**(46)**	**(344)**	**(528)**
Percentage of Need Met		**5%**	**52%**	**30%**	**28%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SAN MATEO PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	2,575	1,287	1,287	1,287	3,862	1,053	6,754	1,272	9,078	15,515
Transitional Kindergarten enrollment	(2)				-395	-395	395			395	
Adjusted Number of Children		2,575	1,287	1,287	893	3,467	1,447	6,754	1,272	9,473	15,515
Labor Force Participation Rate	(3)	76.1%	76.1%	76.1%	76.1%		76.1%	75.5%	75.5%		
Number of children with all parents in labor force		1,959	980	980	679	2,638	1,101	5,100	960	7,161	11,759
Number of 3 and 4 year olds with at least one non-working parent				308	213	521					521
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		784	588	931	645	2,163	606	2,805	528	3,939	6,886
Estimated of demand for part-day preschool				292	203	495					495
Total Demand for Formal Child Care/Preschool		**784**	**588**	**1,223**	**848**	**2,659**	**606**	**2,805**	**528**	**3,939**	**7,381**
SUPPLY											
Number of Center-Based Spaces	(5)	251				3,196				2,477	5,924
Number of Family Child Care Spaces	(6)	283				560				395	1,238
Total Child Care Spaces		**534**				**3,756**				**2,872**	**7,162**
SURPLUS/DEFICIT		**(250)**				**1,097**				**(1,067)**	**(219)**
Percentage of Demand Met		**68%**				**141%**				**73%**	**97%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, San Mateo Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SAN MATEO PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	3,862	2,575	9,078	15,515
Percent below 500% Federal Poverty Level (FPL)	(2)	34.0%	34.0%	40.8%	38.0%
Estimated number of children eligible for subsidized care		**1,313**	**875**	**3,701**	**5,890**
SUPPLY					
Count of Voucher Enrollment	(3)	80	73	171	324
Number of Contractor Spaces	(4)	83	688	1,157	1,929
Total Subsidized Child Care Spaces		**163**	**761**	**1,328**	**2,253**
SURPLUS/DEFICIT		**(1,150)**	**(114)**	**(2,373)**	**(3,637)**
Percentage of Need Met		**12%**	**87%**	**36%**	**38%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SOUTH COAST REGION PROFILE*		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	67	33	33	33	100	29	181	33	243	410
Transitional Kindergarten enrollment	(2)				-11	-11	11			11	
Adjusted Number of Children		67	33	33	23	90	39	181	33	254	410
Labor Force Participation Rate	(3)	84.9%	84.9%	84.9%	84.9%		84.9%	54.4%	54.4%		
Number of children with all parents in labor force		57	28	28	19	76	33	99	18	150	283
Number of 3 and 4 year olds with at least one non-working parent				5	3	9					9
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		23	17	27	18	62	18	54	10	83	168
Estimated of demand for part-day preschool				5	3	8					8
Total Demand for Formal Child Care/Preschool		**23**	**17**	**32**	**22**	**70**	**18**	**54**	**10**	**83**	**176**
SUPPLY											
Number of Center-Based Spaces	(5)	0				60				126	186
Number of Family Child Care Spaces	(6)	0				0				0	0
Total Child Care Spaces		**0**				**60**				**126**	**186**
SURPLUS/DEFICIT		**(23)**				**(10)**				**43**	**10**
Percentage of Demand Met		**0%**				**85%**				**153%**	**106%**

* *South Coast Region includes: La Honda, Loma Mar, Pescadero, and San Gregorio.*

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, La Honda-Pescadero Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SOUTH COAST REGION PROFILE*		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	100	67	243	410
Percent below 500% Federal Poverty Level (FPL)	(2)	35.1%	35.1%	35.1%	35.1%
Estimated number of children eligible for subsidized care		**35**	**23**	**85**	**144**
SUPPLY					
Count of Voucher Enrollment	(3)	0	0	0	0
Number of Contractor Spaces	(4)	0	64	126	189
Total Subsidized Child Care Spaces		**0**	**64**	**126**	**189**
SURPLUS/DEFICIT		**(35)**	**40**	**40**	**45**
Percentage of Need Met		**0%**	**272%**	**147%**	**132%**

* *South Coast Region includes: La Honda, Loma Mar, Pescadero, and San Gregorio.*

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

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Child Care Supply and Demand, All Families, San Mateo County, 2025

SOUTH SAN FRANCISCO PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	1,110	555	555	555	1,665	674	4,138	721	5,533	8,308
Transitional Kindergarten enrollment	(2)				-193	-193	193			193	
Adjusted Number of Children		1,110	555	555	362	1,472	867	4,138	721	5,726	8,308
Labor Force Participation Rate	(3)	79.7%	79.7%	79.7%	79.7%		79.7%	76.5%	76.5%		
Number of children with all parents in labor force		884	442	442	288	1,173	691	3,165	552	4,407	6,464
Number of 3 and 4 year olds with at least one non-working parent				113	74	187					187
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		354	265	420	274	959	380	1,741	303	2,424	3,737
Estimated of demand for part-day preschool				107	70	177					177
Total Demand for Formal Child Care/Preschool		**354**	**265**	**527**	**344**	**1,136**	**380**	**1,741**	**303**	**2,424**	**3,914**
SUPPLY											
Number of Center-Based Spaces	(5)	476				2,274				2,418	5,168
Number of Family Child Care Spaces	(6)	142				278				184	604
Total Child Care Spaces		**618**				**2,552**				**2,602**	**5,772**
SURPLUS/DEFICIT		**264**				**1,416**				**178**	**1,858**
Percentage of Demand Met		**175%**				**225%**				**107%**	**147%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, South San Francisco Unified Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

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Subsidized Child Care and Preschool, San Mateo County, 2025

SOUTH SAN FRANCISCO PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,665	1,110	5,533	8,308
Percent below 500% Federal Poverty Level (FPL)	(2)	45.1%	45.1%	47.5%	46.7%
Estimated number of children eligible for subsidized care		**751**	**501**	**2,630**	**3,882**
SUPPLY					
Count of Voucher Enrollment	(3)	50	47	109	206
Number of Contractor Spaces	(4)	49	714	842	1,605
Total Subsidized Child Care Spaces		**99**	**761**	**951**	**1,811**
SURPLUS/DEFICIT		**(652)**	**260**	**(1,680)**	**(2,072)**
Percentage of Need Met		**13%**	**152%**	**36%**	**47%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

WOODSIDE PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	115	58	58	58	173	60	370	66	496	784
Transitional Kindergarten enrollment	(2)				-28	-28	28			28	
Adjusted Number of Children		115	58	58	30	145	88	370	66	524	784
Labor Force Participation Rate	(3)	76.2%	76.2%	76.2%	76.2%		76.2%	58.3%	58.3%		
Number of children with all parents in labor force		88	44	44	23	111	67	216	39	321	520
Number of 3 and 4 year olds with at least one non-working parent				14	7	21					21
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		35	26	42	21	90	37	119	21	177	301
Estimated of demand for part-day preschool				13	7	20					20
Total Demand for Formal Child Care/Preschool		**35**	**26**	**55**	**28**	**109**	**37**	**119**	**21**	**177**	**321**
SUPPLY											
Number of Center-Based Spaces	(5)	0				92				48	140
Number of Family Child Care Spaces	(6)	0				0				0	0
Total Child Care Spaces		**0**				**92**				**48**	**140**
SURPLUS/DEFICIT		**(35)**				**(17)**				**(129)**	**(181)**
Percentage of Demand Met		**0%**				**84%**				**27%**	**44%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Woodside and Cabrillo Reports. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

WOODSIDE PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	173	115	496	784
Percent below 500% Federal Poverty Level (FPL)	(2)	4.1%	4.1%	20.2%	14.3%
Estimated number of children eligible for subsidized care		**7**	**5**	**100**	**112**
SUPPLY					
Count of Voucher Enrollment	(3)	0	0	0	0
Number of Contractor Spaces	(4)	0	1	14	15
Total Subsidized Child Care Spaces		**0**	**1**	**14**	**15**
SURPLUS/DEFICIT		**(7)**	**(4)**	**(86)**	**(97)**
Percentage of Need Met		**0%**	**24%**	**14%**	**14%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Appendix 3:
Child Care Supply and Demand, School District Profiles, 2025

Bayshore, Child Care Supply and Demand, All Families, 2025
Bayshore, Subsidized Child Care and Preschool, 2025
Belmont-Redwood Shores, Child Care Supply and Demand, All Families, 2025
Belmont-Redwood Shores, Subsidized Child Care and Preschool, 2025
Brisbane, Child Care Supply and Demand, All Families, 2025
Brisbane, Subsidized Child Care and Preschool, 2025
Burlingame, Child Care Supply and Demand, All Families, 2025
Burlingame, Subsidized Child Care and Preschool, 2025
Cabrillo, Child Care Supply and Demand, All Families, 2025
Cabrillo, Subsidized Child Care and Preschool, 2025
Hillsborough, Child Care Supply and Demand, All Families, 2025
Hillsborough, Subsidized Child Care and Preschool, 2025
Jefferson Elementary, Child Care Supply and Demand, All Families, 2025
Jefferson Elementary, Subsidized Child Care and Preschool, 2025
La Honda - Pescadero, Child Care Supply and Demand, All Families, 2025
La Honda - Pescadero, Subsidized Child Care and Preschool, 2025
Las Lomitas, Child Care Supply and Demand, All Families, 2025
Las Lomitas, Subsidized Child Care and Preschool, 2025
Menlo Park, Child Care Supply and Demand, All Families, 2025
Menlo Park, Subsidized Child Care and Preschool, 2025
Millbrae, Child Care Supply and Demand, All Families, 2025
Millbrae, Subsidized Child Care and Preschool, 2025
Pacifica, Child Care Supply and Demand, All Families, 2025
Pacifica, Subsidized Child Care and Preschool, 2025
Portola Valley, Child Care Supply and Demand, All Families, 2025
Portola Valley, Subsidized Child Care and Preschool, 2025
Ravenswood, Child Care Supply and Demand, All Families, 2025
Ravenswood, Subsidized Child Care and Preschool, 2025
Redwood City, Child Care Supply and Demand, All Families, 2025
Redwood City, Subsidized Child Care and Preschool, 2025
San Bruno, Child Care Supply and Demand, All Families, 2025
San Bruno, Subsidized Child Care and Preschool, 2025
San Carlos, Child Care Supply and Demand, All Families, 2025
San Carlos, Subsidized Child Care and Preschool, 2025
San Mateo - Foster City, Child Care Supply and Demand, All Families, 2025
San Mateo - Foster City, Subsidized Child Care and Preschool, 2025
South San Francisco, Child Care Supply and Demand, All Families, 2025
South San Francisco, Subsidized Child Care and Preschool, 2025
Woodside, Child Care Supply and Demand, All Families, 2025
Woodside, Subsidized Child Care and Preschool, 2025

Child Care Supply and Demand, All Families, San Mateo County, 2025

BAYSHORE ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	45	22	22	22	67	53	383	86	521	633
Transitional Kindergarten enrollment	(2)				-21	-21	21			21	
Adjusted Number of Children		45	22	22	1	46	74	383	86	542	633
Labor Force Participation Rate	(3)	100.0%	100.0%	100.0%	100.0%		100.0%	76.9%	76.9%		
Number of children with all parents in labor force		45	22	22	1	46	74	295	66	434	525
Number of 3 and 4 year olds with at least one non-working parent				0	0	0					0
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		18	13	21	1	36	41	162	36	239	293
Estimated of demand for part-day preschool				0	0	0					0
Total Demand for Formal Child Care/Preschool		**18**	**13**	**21**	**1**	**36**	**41**	**162**	**36**	**239**	**293**
SUPPLY											
Number of Center-Based Spaces	(5)	24				125				195	344
Number of Family Child Care Spaces	(6)	24				13				9	46
Total Child Care Spaces		**48**				**138**				**204**	**390**
SURPLUS/DEFICIT		**30**				**102**				**(35)**	**97**
Percentage of Demand Met		**268%**				**383%**				**85%**	**133%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

BAYSHORE ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	67	45	521	633
Percent below 500% Federal Poverty Level (FPL)	(2)	51.2%	51.2%	51.6%	51.5%
Estimated number of children eligible for subsidized care		**34**	**23**	**269**	**326**
SUPPLY					
Count of Voucher Enrollment	(3)	3	3	4	10
Number of Contractor Spaces	(4)	0	57	180	237
Total Subsidized Child Care Spaces		**3**	**59**	**184**	**247**
SURPLUS/DEFICIT		**(31)**	**36**	**(85)**	**(79)**
Percentage of Need Met		**10%**	**259%**	**69%**	**76%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

BELMONT-REDWOOD SHORES SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	884	442	442	442	1,326	536	3,396	625	4,557	6,767
Transitional Kindergarten enrollment	(2)				-232	-232	232			232	
Adjusted Number of Children		884	442	442	210	1,094	768	3,396	625	4,789	6,767
Labor Force Participation Rate	(3)	80.6%	80.6%	80.6%	80.6%		80.6%	78.1%	78.1%		
Number of children with all parents in labor force		713	356	356	170	882	619	2,652	488	3,759	5,354
Number of 3 and 4 year olds with at least one non-working parent				86	41	126					126
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		285	214	339	161	714	341	1,458	268	2,067	3,066
Estimated of demand for part-day preschool				81	39	120					120
Total Demand for Formal Child Care/Preschool		**285**	**214**	**420**	**200**	**834**	**341**	**1,458**	**268**	**2,067**	**3,186**
SUPPLY											
Number of Center-Based Spaces	(5)	193				927				1,030	2,150
Number of Family Child Care Spaces	(6)	50				100				68	218
Total Child Care Spaces		**243**				**1,027**				**1,098**	**2,368**
SURPLUS/DEFICIT		**(42)**				**193**				**(970)**	**(818)**
Percentage of Demand Met		**85%**				**123%**				**53%**	**74%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

BELMONT-REDWOOD SHORES SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,326	884	4,557	6,767
Percent below 500% Federal Poverty Level (FPL)	(2)	23.7%	23.7%	21.3%	22.1%
Estimated number of children eligible for subsidized care		**315**	**210**	**971**	**1,495**
SUPPLY					
Count of Voucher Enrollment	(3)	14	17	36	67
Number of Contractor Spaces	(4)	3	59	284	346
Total Subsidized Child Care Spaces		**17**	**76**	**320**	**413**
SURPLUS/DEFICIT		**(298)**	**(134)**	**(651)**	**(1,082)**
Percentage of Need Met		**5%**	**36%**	**33%**	**28%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

BRISBANE SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	180	90	90	90	270	81	523	99	704	1,154
Transitional Kindergarten enrollment	(2)				-32	-32	32			32	
Adjusted Number of Children		180	90	90	58	238	113	523	99	735	1,154
Labor Force Participation Rate	(3)	57.2%	57.2%	57.2%	57.2%		57.2%	86.1%	86.1%		
Number of children with all parents in labor force		103	52	52	33	136	65	451	85	601	840
Number of 3 and 4 year olds with at least one non-working parent				38	25	63					63
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		41	31	49	32	112	36	248	47	330	483
Estimated of demand for part-day preschool				37	24	60					60
Total Demand for Formal Child Care/Preschool		**41**	**31**	**86**	**55**	**172**	**36**	**248**	**47**	**330**	**543**
SUPPLY											
Number of Center-Based Spaces	(5)	0				48				220	268
Number of Family Child Care Spaces	(6)	3				6				4	14
Total Child Care Spaces		**3**				**54**				**224**	**282**
SURPLUS/DEFICIT		**(38)**				**(118)**				**(106)**	**(261)**
Percentage of Demand Met		**8%**				**32%**				**68%**	**52%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

BRISBANE SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	270	180	704	1,154
Percent below 500% Federal Poverty Level (FPL)	(2)	52.5%	52.5%	57.9%	55.8%
Estimated number of children eligible for subsidized care		**142**	**94**	**408**	**644**
SUPPLY					
Count of Voucher Enrollment	(3)	4	3	4	11
Number of Contractor Spaces	(4)	0	17	44	60
Total Subsidized Child Care Spaces		**4**	**19**	**48**	**71**
SURPLUS/DEFICIT		**(137)**	**(75)**	**(360)**	**(573)**
Percentage of Need Met		**3%**	**20%**	**12%**	**11%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

BURLINGAME SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	740	370	370	370	1,110	358	2,290	428	3,076	4,926
Transitional Kindergarten enrollment	(2)				-235	-235	235			235	
Adjusted Number of Children		740	370	370	135	875	594	2,290	428	3,311	4,926
Labor Force Participation Rate	(3)	75.1%	75.1%	75.1%	75.1%		75.1%	75.2%	75.2%		
Number of children with all parents in labor force		556	278	278	101	657	446	1,722	322	2,490	3,702
Number of 3 and 4 year olds with at least one non-working parent				92	34	126					126
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		222	167	264	96	527	245	947	177	1,369	2,118
Estimated of demand for part-day preschool				88	32	120					120
Total Demand for Formal Child Care/Preschool		**222**	**167**	**352**	**128**	**646**	**245**	**947**	**177**	**1,369**	**2,238**
SUPPLY											
Number of Center-Based Spaces	(5)	72				1,077				809	1,958
Number of Family Child Care Spaces	(6)	43				86				58	188
Total Child Care Spaces		**115**				**1,163**				**867**	**2,146**
SURPLUS/DEFICIT		**(107)**				**517**				**(502)**	**(92)**
Percentage of Demand Met		**52%**				**180%**				**63%**	**96%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

BURLINGAME SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,110	740	3,076	4,926
Percent below 500% Federal Poverty Level (FPL)	(2)	16.8%	16.8%	29.5%	24.7%
Estimated number of children eligible for subsidized care		**187**	**125**	**907**	**1,218**
SUPPLY					
Count of Voucher Enrollment	(3)	7	17	23	47
Number of Contractor Spaces	(4)	15	59	254	327
Total Subsidized Child Care Spaces		**22**	**76**	**277**	**374**
SURPLUS/DEFICIT		**(165)**	**(49)**	**(630)**	**(844)**
Percentage of Need Met		**12%**	**61%**	**31%**	**31%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

CABRILLO UNIFIED SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	537	269	269	269	806	247	1,594	304	2,145	3,488
Transitional Kindergarten enrollment	(2)				-109	-109	109			109	
Adjusted Number of Children		537	269	269	160	697	356	1,594	304	2,254	3,488
Labor Force Participation Rate	(3)	76.5%	76.5%	76.5%	76.5%		76.5%	83.0%	83.0%		
Number of children with all parents in labor force		411	205	205	122	533	272	1,323	252	1,847	2,791
Number of 3 and 4 year olds with at least one non-working parent				63	38	101					101
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		164	123	195	116	435	150	728	139	1,016	1,615
Estimated of demand for part-day preschool				60	36	96					96
Total Demand for Formal Child Care/Preschool		**164**	**123**	**255**	**152**	**530**	**150**	**728**	**139**	**1,016**	**1,711**
SUPPLY											
Number of Center-Based Spaces	(5)	36				320				461	817
Number of Family Child Care Spaces	(6)	18				35				24	76
Total Child Care Spaces		**54**				**355**				**485**	**893**
SURPLUS/DEFICIT		**(111)**				**(176)**				**(531)**	**(818)**
Percentage of Demand Met		**33%**				**67%**				**48%**	**52%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

CABRILLO UNIFIED SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	806	537	2,145	3,488
Percent below 500% Federal Poverty Level (FPL)	(2)	51.4%	51.4%	48.4%	49.5%
Estimated number of children eligible for subsidized care		**414**	**276**	**1,038**	**1,728**
SUPPLY					
Count of Voucher Enrollment	(3)	5	3	11	19
Number of Contractor Spaces	(4)	44	220	437	700
Total Subsidized Child Care Spaces		**49**	**223**	**448**	**719**
SURPLUS/DEFICIT		**(365)**	**(53)**	**(591)**	**(1,009)**
Percentage of Need Met		**12%**	**81%**	**43%**	**42%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

HILLSBOROUGH CITY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	190	95	95	95	286	169	1,129	226	1,524	2,000
Transitional Kindergarten enrollment	(2)				-44	-44	44			44	
Adjusted Number of Children		190	95	95	51	242	213	1,129	226	1,568	2,000
Labor Force Participation Rate	(3)	69.3%	69.3%	69.3%	69.3%		69.3%	52.3%	52.3%		
Number of children with all parents in labor force		132	66	66	36	168	148	591	118	857	1,157
Number of 3 and 4 year olds with at least one non-working parent				29	16	45					45
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		53	40	63	34	136	81	325	65	471	660
Estimated of demand for part-day preschool				28	15	43					43
Total Demand for Formal Child Care/Preschool		**53**	**40**	**90**	**49**	**179**	**81**	**325**	**65**	**471**	**703**
SUPPLY											
Number of Center-Based Spaces	(5)	0				99				60	159
Number of Family Child Care Spaces	(6)	3				6				4	14
Total Child Care Spaces		**3**				**105**				**64**	**173**
SURPLUS/DEFICIT		**(50)**				**(73)**				**(407)**	**(530)**
Percentage of Demand Met		**6%**				**59%**				**14%**	**25%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

HILLSBOROUGH CITY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	286	190	1,524	2,000
Percent below 500% Federal Poverty Level (FPL)	(2)	15.5%	15.5%	23.6%	21.7%
Estimated number of children eligible for subsidized care		**44**	**30**	**360**	**434**
SUPPLY					
Count of Voucher Enrollment	(3)	0	0	0	0
Number of Contractor Spaces	(4)	0	7	16	23
Total Subsidized Child Care Spaces		**0**	**7**	**16**	**23**
SURPLUS/DEFICIT		**(44)**	**(23)**	**(344)**	**(411)**
Percentage of Need Met		**0%**	**23%**	**4%**	**5%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

JEFFERSON ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	1,494	747	747	747	2,241	759	4,514	740	6,013	9,748
Transitional Kindergarten enrollment	(2)				-316	-316	316			316	
Adjusted Number of Children		1,494	747	747	431	1,925	1,075	4,514	740	6,329	9,748
Labor Force Participation Rate	(3)	74.8%	74.8%	74.8%	74.8%		74.8%	81.8%	81.8%		
Number of children with all parents in labor force		1,117	559	559	322	1,440	803	3,691	605	5,099	7,656
Number of 3 and 4 year olds with at least one non-working parent				188	109	297					297
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		447	335	531	306	1,172	442	2,030	333	2,804	4,423
Estimated of demand for part-day preschool				179	103	282					282
Total Demand for Formal Child Care/Preschool		**447**	**335**	**710**	**410**	**1,454**	**442**	**2,030**	**333**	**2,804**	**4,706**
SUPPLY											
Number of Center-Based Spaces	(5)	104				1,154				1,260	2,518
Number of Family Child Care Spaces	(6)	93				183				125	401
Total Child Care Spaces		**197**				**1,337**				**1,385**	**2,919**
SURPLUS/DEFICIT		**(250)**				**(117)**				**(1,420)**	**(1,787)**
Percentage of Demand Met		**44%**				**92%**				**49%**	**62%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

JEFFERSON ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	2,241	1,494	6,013	9,748
Percent below 500% Federal Poverty Level (FPL)	(2)	62.3%	62.3%	64.1%	63.5%
Estimated number of children eligible for subsidized care		**1,397**	**931**	**3,857**	**6,185**
SUPPLY					
Count of Voucher Enrollment	(3)	43	42	58	143
Number of Contractor Spaces	(4)	56	405	1,685	2,146
Total Subsidized Child Care Spaces		**99**	**447**	**1,743**	**2,289**
SURPLUS/DEFICIT		**(1,298)**	**(485)**	**(2,114)**	**(3,896)**
Percentage of Need Met		**7%**	**48%**	**45%**	**37%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

LA HONDA-PESCADERO UNIFIED SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	62	31	31	31	92	29	181	33	243	397
Transitional Kindergarten enrollment	(2)				-11	-11	11			11	
Adjusted Number of Children		62	31	31	20	82	39	181	33	254	397
Labor Force Participation Rate	(3)	83.9%	83.9%	83.9%	83.9%		83.9%	56.7%	56.7%		
Number of children with all parents in labor force		52	26	26	17	69	33	103	19	154	275
Number of 3 and 4 year olds with at least one non-working parent				5	3	8					8
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		21	15	25	16	56	18	56	10	85	162
Estimated of demand for part-day preschool				5	3	8					8
Total Demand for Formal Child Care/Preschool		**21**	**15**	**29**	**19**	**64**	**18**	**56**	**10**	**85**	**170**
SUPPLY											
Number of Center-Based Spaces	(5)	0				60				126	186
Number of Family Child Care Spaces	(6)	0				0				0	0
Total Child Care Spaces		**0**				**60**				**126**	**186**
SURPLUS/DEFICIT		**(21)**				**(4)**				**41**	**16**
Percentage of Demand Met		**0%**				**94%**				**148%**	**110%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

LA HONDA-PESCADERO UNIFIED SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	92	62	243	397
Percent below 500% Federal Poverty Level (FPL)	(2)	35.1%	35.1%	35.1%	35.1%
Estimated number of children eligible for subsidized care		**32**	**22**	**85**	**139**
SUPPLY					
Count of Voucher Enrollment	(3)	0	0	0	0
Number of Contractor Spaces	(4)	0	64	126	189
Total Subsidized Child Care Spaces		**0**	**64**	**126**	**189**
SURPLUS/DEFICIT		**(32)**	**42**	**40**	**50**
Percentage of Need Met		**0%**	**295%**	**147%**	**136%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

LAS LOMITAS ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	166	83	83	83	249	94	676	150	919	1,334
Transitional Kindergarten enrollment	(2)				-83	-83	83			83	
Adjusted Number of Children		166	83	83	0	166	177	676	150	1,002	1,334
Labor Force Participation Rate	(3)	78.6%	78.6%	78.6%	78.6%		78.6%	69.5%	69.5%		
Number of children with all parents in labor force		131	65	65	0	131	139	470	104	713	974
Number of 3 and 4 year olds with at least one non-working parent				18	0	18					18
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		52	39	62	0	101	77	258	57	392	546
Estimated of demand for part-day preschool				17	0	17					17
Total Demand for Formal Child Care/Preschool		**52**	**39**	**79**	**0**	**118**	**77**	**258**	**57**	**392**	**562**
SUPPLY											
Number of Center-Based Spaces	(5)	0				280				276	556
Number of Family Child Care Spaces	(6)	8				16				11	35
Total Child Care Spaces		**8**				**296**				**287**	**591**
SURPLUS/DEFICIT		**(44)**				**178**				**(105)**	**28**
Percentage of Demand Met		**15%**				**251%**				**73%**	**105%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).
(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment was 84.
(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).
(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.
(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.
(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

LAS LOMITAS ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	249	166	919	1,334
Percent below 500% Federal Poverty Level (FPL)	(2)	12.8%	12.8%	7.3%	9.0%
Estimated number of children eligible for subsidized care		**32**	**21**	**67**	**120**
SUPPLY					
Count of Voucher Enrollment	(3)	3	3	5	12
Number of Contractor Spaces	(4)		11	55	66
Total Subsidized Child Care Spaces		**3**	**14**	**61**	**78**
SURPLUS/DEFICIT		**(29)**	**(7)**	**(7)**	**(43)**
Percentage of Need Met		**9%**	**66%**	**90%**	**64%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

MENLO PARK CITY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	678	339	339	339	1,017	388	2,236	343	2,966	4,661
Transitional Kindergarten enrollment	(2)				-232	-232	232			232	
Adjusted Number of Children		678	339	339	107	785	619	2,236	343	3,197	4,661
Labor Force Participation Rate	(3)	64.2%	64.2%	64.2%	64.2%		64.2%	59.8%	59.8%		
Number of children with all parents in labor force		435	218	218	69	504	397	1,337	205	1,940	2,879
Number of 3 and 4 year olds with at least one non-working parent				121	38	160					160
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		174	131	207	65	403	219	736	113	1,067	1,644
Estimated of demand for part-day preschool				115	37	152					152
Total Demand for Formal Child Care/Preschool		**174**	**131**	**322**	**102**	**555**	**219**	**736**	**113**	**1,067**	**1,796**
SUPPLY											
Number of Center-Based Spaces	(5)	115				1,015				772	1,902
Number of Family Child Care Spaces	(6)	28				56				38	122
Total Child Care Spaces		**143**				**1,071**				**810**	**2,024**
SURPLUS/DEFICIT		**(31)**				**516**				**(257)**	**228**
Percentage of Demand Met		**82%**				**193%**				**76%**	**113%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

MENLO PARK CITY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,017	678	2,966	4,661
Percent below 500% Federal Poverty Level (FPL)	(2)	22.3%	22.3%	10.3%	14.7%
Estimated number of children eligible for subsidized care		**227**	**151**	**305**	**683**
SUPPLY					
Count of Voucher Enrollment	(3)	11	12	19	42
Number of Contractor Spaces	(4)	0	52	130	181
Total Subsidized Child Care Spaces		**11**	**64**	**149**	**223**
SURPLUS/DEFICIT		**(216)**	**(87)**	**(157)**	**(460)**
Percentage of Need Met		**5%**	**42%**	**49%**	**33%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

MILLBRAE SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	574	287	287	287	862	226	1,454	275	1,955	3,391
Transitional Kindergarten enrollment	(2)				-105	-105	105			105	
Adjusted Number of Children		574	287	287	182	756	331	1,454	275	2,061	3,391
Labor Force Participation Rate	(3)	71.9%	71.9%	71.9%	71.9%		71.9%	83.8%	83.8%		
Number of children with all parents in labor force		413	207	207	131	544	238	1,219	231	1,687	2,644
Number of 3 and 4 year olds with at least one non-working parent				81	51	132					132
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		165	124	196	124	444	131	670	127	928	1,538
Estimated of demand for part-day preschool				77	49	125					125
Total Demand for Formal Child Care/Preschool		**165**	**124**	**273**	**173**	**570**	**131**	**670**	**127**	**928**	**1,663**
SUPPLY											
Number of Center-Based Spaces	(5)	0				495				260	755
Number of Family Child Care Spaces	(6)	42				83				57	182
Total Child Care Spaces		**42**				**578**				**317**	**937**
SURPLUS/DEFICIT		**(123)**				**9**				**(611)**	**(726)**
Percentage of Demand Met		**25%**				**102%**				**34%**	**56%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

MILLBRAE SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	862	574	1,955	3,391
Percent below 500% Federal Poverty Level (FPL)	(2)	36.0%	36.0%	40.9%	38.9%
Estimated number of children eligible for subsidized care		**311**	**207**	**800**	**1,318**
SUPPLY					
Count of Voucher Enrollment	(3)	10	15	21	46
Number of Contractor Spaces	(4)	6	52	306	364
Total Subsidized Child Care Spaces		**16**	**67**	**326**	**409**
SURPLUS/DEFICIT		**(295)**	**(140)**	**(474)**	**(908)**
Percentage of Need Met		**5%**	**32%**	**41%**	**31%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

PACIFICA SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	712	356	356	356	1,067	316	2,055	395	2,766	4,545
Transitional Kindergarten enrollment	(2)				-176	-176	176			176	
Adjusted Number of Children		712	356	356	180	892	492	2,055	395	2,942	4,545
Labor Force Participation Rate	(3)	78.7%	78.7%	78.7%	78.7%		78.7%	78.6%	78.6%		
Number of children with all parents in labor force		560	280	280	142	702	387	1,615	311	2,313	3,574
Number of 3 and 4 year olds with at least one non-working parent				76	38	114					114
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		224	168	266	135	569	213	888	171	1,272	2,064
Estimated of demand for part-day preschool				72	37	109					109
Total Demand for Formal Child Care/Preschool		**224**	**168**	**338**	**171**	**677**	**213**	**888**	**171**	**1,272**	**2,173**
SUPPLY											
Number of Center-Based Spaces	(5)	34				636				989	1,659
Number of Family Child Care Spaces	(6)	45				90				67	202
Total Child Care Spaces		**79**				**726**				**1,056**	**1,861**
SURPLUS/DEFICIT		**(145)**				**49**				**(216)**	**(312)**
Percentage of Demand Met		**35%**				**107%**				**83%**	**86%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade, Pacifica Report. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

PACIFICA SCHOOl DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,067	712	2,766	4,545
Percent below 500% Federal Poverty Level (FPL)	(2)	40.0%	40.0%	43.8%	42.3%
Estimated number of children eligible for subsidized care		**427**	**285**	**1,212**	**1,924**
SUPPLY					
Count of Voucher Enrollment	(3)	13	15	20	48
Number of Contractor Spaces	(4)	76	151	198	426
Total Subsidized Child Care Spaces		**89**	**166**	**218**	**474**
SURPLUS/DEFICIT		**(338)**	**(119)**	**(994)**	**(1,451)**
Percentage of Need Met		**21%**	**58%**	**18%**	**25%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

PORTOLA VALLEY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	158	79	79	79	237	71	439	78	588	983
Transitional Kindergarten enrollment	(2)				-72	-72	72			72	
Adjusted Number of Children		158	79	79	7	165	143	439	78	660	983
Labor Force Participation Rate	(3)	68.2%	68.2%	68.2%	68.2%		68.2%	53.3%	53.3%		
Number of children with all parents in labor force		108	54	54	5	113	97	234	42	373	594
Number of 3 and 4 year olds with at least one non-working parent				25	2	27					27
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		43	32	51	5	88	54	129	23	205	337
Estimated of demand for part-day preschool				24	2	26					26
Total Demand for Formal Child Care/Preschool		**43**	**32**	**75**	**7**	**114**	**54**	**129**	**23**	**205**	**362**
SUPPLY											
Number of Center-Based Spaces	(5)	0				204				40	244
Number of Family Child Care Spaces	(6)	0				0				0	0
Total Child Care Spaces		**0**				**204**				**40**	**244**
SURPLUS/DEFICIT		**(43)**				**90**				**(165)**	**(118)**
Percentage of Demand Met		**0%**				**179%**				**19%**	**67%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

PORTOLA VALLEY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	237	158	588	983
Percent below 500% Federal Poverty Level (FPL)	(2)	9.8%	9.8%	7.9%	8.7%
Estimated number of children eligible for subsidized care		**23**	**15**	**46**	**85**
SUPPLY					
Count of Voucher Enrollment	(3)	1	1	1	3
Number of Contractor Spaces	(4)	0	7	14	21
Total Subsidized Child Care Spaces		**1**	**8**	**15**	**24**
SURPLUS/DEFICIT		**(22)**	**(7)**	**(32)**	**(61)**
Percentage of Need Met		**4%**	**52%**	**32%**	**28%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

RAVENSWOOD CITY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	819	409	409	409	1,228	371	2,285	400	3,056	5,103
Transitional Kindergarten enrollment	(2)				-144	-144	144			144	
Adjusted Number of Children		819	409	409	265	1,084	515	2,285	400	3,200	5,103
Labor Force Participation Rate	(3)	61.7%	61.7%	61.7%	61.7%		61.7%	73.8%	73.8%		
Number of children with all parents in labor force		505	253	253	164	669	318	1,687	296	2,300	3,474
Number of 3 and 4 year olds with at least one non-working parent				157	102	258					258
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		202	152	240	156	547	175	928	163	1,265	2,014
Estimated of demand for part-day preschool				149	97	246					246
Total Demand for Formal Child Care/Preschool		**202**	**152**	**389**	**252**	**793**	**175**	**928**	**163**	**1,265**	**2,260**
SUPPLY											
Number of Center-Based Spaces	(5)	52				1,083				1,516	2,651
Number of Family Child Care Spaces	(6)	83				164				112	359
Total Child Care Spaces		**135**				**1,247**				**1,628**	**3,010**
SURPLUS/DEFICIT		**(67)**				**454**				**363**	**750**
Percentage of Demand Met		**67%**				**157%**				**129%**	**133%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

RAVENSWOOD CITY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	1,228	819	3,056	5,103
Percent below 500% Federal Poverty Level (FPL)	(2)	86.5%	86.5%	82.1%	83.9%
Estimated number of children eligible for subsidized care		**1,062**	**708**	**2,510**	**4,281**
SUPPLY					
Count of Voucher Enrollment	(3)	57	52	127	236
Number of Contractor Spaces	(4)	33	549	1,696	2,279
Total Subsidized Child Care Spaces		**90**	**602**	**1,824**	**2,515**
SURPLUS/DEFICIT		**(973)**	**(106)**	**(686)**	**(1,766)**
Percentage of Need Met		**8%**	**85%**	**73%**	**59%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

REDWOOD CITY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	2,198	1,099	1,099	1,099	3,297	1,121	6,983	1,250	9,354	14,849
Transitional Kindergarten enrollment	(2)				-469	-469	469			469	
Adjusted Number of Children		2,198	1,099	1,099	630	2,828	1,589	6,983	1,250	9,823	14,849
Labor Force Participation Rate	(3)	69.8%	69.8%	69.8%	69.8%		69.8%	71.9%	71.9%		
Number of children with all parents in labor force		1,534	767	767	440	1,974	1,109	5,024	900	7,033	10,541
Number of 3 and 4 year olds with at least one non-working parent				332	190	522					522
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		614	460	729	418	1,607	610	2,763	495	3,868	6,089
Estimated of demand for part-day preschool				315	181	496					496
Total Demand for Formal Child Care/Preschool		**614**	**460**	**1,044**	**599**	**2,103**	**610**	**2,763**	**495**	**3,868**	**6,585**
SUPPLY											
Number of Center-Based Spaces	(5)	275				2,227				2,227	4,729
Number of Family Child Care Spaces	(6)	223				441				300	965
Total Child Care Spaces		**498**				**2,668**				**2,527**	**5,694**
SURPLUS/DEFICIT		**(115)**				**565**				**(1,341)**	**(891)**
Percentage of Demand Met		**81%**				**127%**				**65%**	**86%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

REDWOOD CITY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	3,297	2,198	9,354	14,849
Percent below 500% Federal Poverty Level (FPL)	(2)	53.0%	53.0%	49.4%	50.8%
Estimated number of children eligible for subsidized care		**1,749**	**1,166**	**4,621**	**7,536**
SUPPLY					
Count of Voucher Enrollment	(3)	81	82	137	300
Number of Contractor Spaces	(4)	319	901	2,995	4,215
Total Subsidized Child Care Spaces		**400**	**983**	**3,132**	**4,515**
SURPLUS/DEFICIT		**(1,349)**	**(183)**	**(1,489)**	**(3,021)**
Percentage of Need Met		**23%**	**84%**	**68%**	**60%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SAN BRUNO PARK SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	650	325	325	325	975	319	2,088	406	2,813	4,438
Transitional Kindergarten enrollment	(2)				-186	-186	186			186	
Adjusted Number of Children		650	325	325	139	789	505	2,088	406	2,999	4,438
Labor Force Participation Rate	(3)	79.5%	79.5%	79.5%	79.5%		79.5%	79.7%	79.7%		
Number of children with all parents in labor force		517	258	258	111	627	402	1,664	324	2,389	3,533
Number of 3 and 4 year olds with at least one non-working parent				67	28	95					95
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		207	155	246	105	506	221	915	178	1,314	2,026
Estimated of demand for part-day preschool				63	27	90					90
Total Demand for Formal Child Care/Preschool		**207**	**155**	**309**	**132**	**596**	**221**	**915**	**178**	**1,314**	**2,116**
SUPPLY											
Number of Center-Based Spaces	(5)	20				1,077				409	1,506
Number of Family Child Care Spaces	(6)	49				97				66	213
Total Child Care Spaces		**69**				**1,174**				**475**	**1,719**
SURPLUS/DEFICIT		**(138)**				**579**				**(839)**	**(398)**
Percentage of Demand Met		**33%**				**197%**				**36%**	**81%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SAN BRUNO PARK SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	975	650	2,813	4,438
Percent below 500% Federal Poverty Level (FPL)	(2)	42.7%	42.7%	54.0%	49.9%
Estimated number of children eligible for subsidized care		**417**	**278**	**1,520**	**2,215**
SUPPLY					
Count of Voucher Enrollment	(3)	14	15	40	69
Number of Contractor Spaces	(4)	12	236	486	733
Total Subsidized Child Care Spaces		**26**	**250**	**525**	**802**
SURPLUS/DEFICIT		**(390)**	**(27)**	**(995)**	**(1,413)**
Percentage of Need Met		**6%**	**90%**	**35%**	**36%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SAN CARLOS SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	636	318	318	318	955	407	2,470	421	3,299	4,890
Transitional Kindergarten enrollment	(2)				-244	-244	244			244	
Adjusted Number of Children		636	318	318	74	711	651	2,470	421	3,543	4,890
Labor Force Participation Rate	(3)	77.2%	77.2%	77.2%	77.2%		77.2%	79.0%	79.0%		
Number of children with all parents in labor force		492	246	246	57	549	503	1,953	333	2,788	3,829
Number of 3 and 4 year olds with at least one non-working parent				72	17	89					89
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		197	147	233	54	435	277	1,074	183	1,534	2,166
Estimated of demand for part-day preschool				69	16	85					85
Total Demand for Formal Child Care/Preschool		**197**	**147**	**302**	**71**	**520**	**277**	**1,074**	**183**	**1,534**	**2,251**
SUPPLY											
Number of Center-Based Spaces	(5)	100				920				1,138	2,158
Number of Family Child Care Spaces	(6)	36				70				48	154
Total Child Care Spaces		**136**				**990**				**1,186**	**2,312**
SURPLUS/DEFICIT		**(61)**				**470**				**(348)**	**61**
Percentage of Demand Met		**69%**				**190%**				**77%**	**103%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SAN CARLOS SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	955	636	3,299	4,890
Percent below 500% Federal Poverty Level (FPL)	(2)	14.4%	14.4%	14.7%	14.6%
Estimated number of children eligible for subsidized care		**138**	**92**	**484**	**714**
SUPPLY					
Count of Voucher Enrollment	(3)	7	5	13	25
Number of Contractor Spaces	(4)	0	43	138	181
Total Subsidized Child Care Spaces		**7**	**48**	**151**	**206**
SURPLUS/DEFICIT		**(131)**	**(44)**	**(333)**	**(508)**
Percentage of Need Met		**5%**	**52%**	**31%**	**29%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SAN MATEO - FOSTER CITY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	3,285	1,642	1,642	1,642	4,927	1,434	8,928	1,596	11,958	20,170
Transitional Kindergarten enrollment	(2)				-600	-600	600			600	
Adjusted Number of Children		3,285	1,642	1,642	1,042	4,327	2,034	8,928	1,596	12,558	20,170
Labor Force Participation Rate	(3)	73.2%	73.2%	73.2%	73.2%		73.2%	76.7%	76.7%		
Number of children with all parents in labor force		2,405	1,203	1,203	763	3,168	1,489	6,844	1,224	9,556	15,130
Number of 3 and 4 year olds with at least one non-working parent				440	279	719					719
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		962	722	1,142	725	2,589	819	3,764	673	5,256	8,807
Estimated of demand for part-day preschool				418	265	683					683
Total Demand for Formal Child Care/Preschool		**962**	**722**	**1,560**	**990**	**3,272**	**819**	**3,764**	**673**	**5,256**	**9,490**
SUPPLY											
Number of Center-Based Spaces	(5)	400				4,127				3,290	7,817
Number of Family Child Care Spaces	(6)	370				731				498	1,598
Total Child Care Spaces		**770**				**4,858**				**3,788**	**9,415**
SURPLUS/DEFICIT		**(192)**				**1,586**				**(1,468)**	**(75)**
Percentage of Demand Met		**80%**				**148%**				**72%**	**99%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

(3) Estimates from American Community Survey, B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents (2023, 5-year estimates).

(4) Demand factors based on an analysis of recent parent surveys. Assumes a space for 95% of 3 to 4 year olds as county moves toward Universal PreKindergarten.

(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SAN MATEO - FOSTER CITY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	4,927	3,285	11,958	20,170
Percent below 500% Federal Poverty Level (FPL)	(2)	30.1%	30.1%	33.7%	32.2%
Estimated number of children eligible for subsidized care		**1,482**	**988**	**4,031**	**6,502**
SUPPLY					
Count of Voucher Enrollment	(3)	96	89	197	382
Number of Contractor Spaces	(4)	83	746	1,594	2,423
Total Subsidized Child Care Spaces		**179**	**835**	**1,791**	**2,805**
SURPLUS/DEFICIT		**(1,303)**	**(154)**	**(2,240)**	**(3,697)**
Percentage of Need Met		**12%**	**84%**	**44%**	**43%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Child Care Supply and Demand, All Families, San Mateo County, 2025

SOUTH SAN FRANCISCO UNIFIED SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	1,445	722	722	722	2,167	803	4,898	842	6,543	10,155
Transitional Kindergarten enrollment	(2)				-233	-233	233			233	
Adjusted Number of Children		1,445	722	722	489	1,934	1,037	4,898	842	6,776	10,155
Labor Force Participation Rate	(3)	78.2%	78.2%	78.2%	78.2%		78.2%	78.1%	78.1%		
Number of children with all parents in labor force		1,130	565	565	383	1,513	811	3,825	658	5,293	7,936
Number of 3 and 4 year olds with at least one non-working parent				157	106	264					264
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		452	339	537	363	1,239	446	2,104	362	2,911	4,603
Estimated of demand for part-day preschool				149	101	251					251
Total Demand for Formal Child Care/Preschool		**452**	**339**	**686**	**465**	**1,490**	**446**	**2,104**	**362**	**2,911**	**4,853**
SUPPLY											
Number of Center-Based Spaces	(5)	476				2,274				2,946	5,696
Number of Family Child Care Spaces	(6)	166				328				223	717
Total Child Care Spaces		**642**				**2,602**				**3,169**	**6,413**
SURPLUS/DEFICIT		**190**				**1,112**				**258**	**1,560**
Percentage of Demand Met		**142%**				**175%**				**109%**	**132%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) CDE DataQuest, 2023-24 Enrollment by Grade. 2023-24 enrollment is multiplied for 1.755 to estimate TK enrollment when fully implemented. Based on TK enrollment projections provided by the San Mateo County Office of Education which show an average 75.5% increase in TK enrollment between 2023-24 and 2027-28. Based on analysis of TK projections retrieved from https://www.smcoe.org/for-schools/research-and-systems-planning/county-data-dashboards-and-reports.html.

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(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

SOUTH SAN FRANCISCO UNIFIED SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	2,167	1,445	6,543	10,155
Percent below 500% Federal Poverty Level (FPL)	(2)	46.1%	46.1%	46.6%	46.4%
Estimated number of children eligible for subsidized care		**999**	**666**	**3,047**	**4,711**
SUPPLY					
Count of Voucher Enrollment	(3)	50	47	109	206
Number of Contractor Spaces	(4)	65	747	1,016	1,827
Total Subsidized Child Care Spaces		**115**	**794**	**1,125**	**2,033**
SURPLUS/DEFICIT		**(884)**	**128**	**(1,922)**	**(2,678)**
Percentage of Need Met		**12%**	**119%**	**37%**	**43%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

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Child Care Supply and Demand, All Families, San Mateo County, 2025

WOODSIDE ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler	Preschool				School Age				Total
		< 2 years	2 years	3 years	4 years	Total 2 to 4 years	5 years	6 to 11 years	12 years	Total 5 to 12 years	0 to 12 years
DEMAND											
Number of Children	(1)	76	38	38	38	114	35	247	53	335	525
Transitional Kindergarten enrollment	(2)				-28	-28	28			28	
Adjusted Number of Children		76	38	38	10	86	63	247	53	363	525
Labor Force Participation Rate	(3)	82.4%	82.4%	82.4%	82.4%		82.4%	45.5%	45.5%		
Number of children with all parents in labor force		63	31	31	8	71	52	112	24	189	322
Number of 3 and 4 year olds with at least one non-working parent				7	2	8					8
Child Care Demand Factor	(4)	40.0%	60.0%	95.0%	95.0%		55%	55%	55%		
Estimated of demand for child care		25	19	30	8	56	29	62	13	104	185
Estimated of demand for part-day preschool				6	2	8					8
Total Demand for Formal Child Care/Preschool		**25**	**19**	**36**	**9**	**64**	**29**	**62**	**13**	**104**	**193**
SUPPLY											
Number of Center-Based Spaces	(5)	0				92				48	140
Number of Family Child Care Spaces	(6)	0				0				0	0
Total Child Care Spaces		**0**				**92**				**48**	**140**
SURPLUS/DEFICIT		**(25)**				**28**				**(56)**	**(53)**
Percentage of Demand Met		**0%**				**143%**				**46%**	**73%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

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(5) Supply data includes: all licensed infant, preschool, and school age centers; licensed family child care homes; license-exempt programs such as City or School District operated, Parent Co-ops, and Heritage schools. Sources: Community Care Licensing, Child Care Coordinating Council of San Mateo County, California Department of Education.

(6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.

Subsidized Child Care and Preschool, San Mateo County, 2025

WOODSIDE ELEMENTARY SCHOOL DISTRICT PROFILE		Infant/Toddler 0 to 2 years	Preschool 3 to 4 years	School Age 5 to 12 years	Total 0 to 12 years
NEED					
Number of Children	(1)	114	76	335	525
Percent below 500% Federal Poverty Level (FPL)	(2)	0.9%	0.9%	14.0%	9.3%
Estimated number of children eligible for subsidized care		**1**	**1**	**47**	**49**
SUPPLY					
Count of Voucher Enrollment	(3)	0	0	0	0
Number of Contractor Spaces	(4)	0	0	14	15
Total Subsidized Child Care Spaces		**0**	**0**	**14**	**15**
SURPLUS/DEFICIT		**(1)**	**(0)**	**(33)**	**(34)**
Percentage of Need Met		**0%**	**37%**	**30%**	**30%**

(1) Estimates from American Community Survey, S0101: Age and Sex (2023, 5-year estimates).

(2) Estimates from American Community Survey, B17024: Age by Ratio of Income to Poverty Level in the Past 12 Months (2023, 5-year estimates).

(3) Voucher enrollment includes Alternative Payment Proogram, and CalWORKS Stage 1, 2, and 3 Child Care. Based on family residence zip code; parent can choose licensed or license-exempt care. Reported by 4Cs via email, January 2025.

(4) Contrator spaces include state contracts (CCTR-General Child Care and CSPP-State Preschool), Trasitional Kindergarten enrollment multiplied by the percent below 500% FPL, federal Early Head Start and Head Start Contracts, local Big Lift-funded preschool, Expanded Learning Opportunities Program (ELO-P) and After School Education and Safety Program (ASES) state funding. Gathered via survey of contractors in February 2025 and analysis of funding allocations.

Appendix 4: Zip Code Priorities for Subsidized Care

2024-2025 CCTR (Infant-Toddler) Zip Code Priorities

County Code	Zip Code	LPC Priority
41	94002	1
41	94005	2
41	94010	1
41	94014	1
41	94015	1
41	94019	1
41	94020	3
41	94021	3
41	94025	1
41	94027	3
41	94028	3
41	94030	1
41	94037	3
41	94038	3
41	94044	1
41	94060	3
41	94061	1
41	94062	2
41	94063	1
41	94065	3
41	94066	1
41	94070	2
41	94074	3
41	94080	1
41	94303	1
41	94401	1
41	94402	1
41	94403	1
41	94404	1

2024-2025 CSPP (Preschool) Zip Code Priorities

County Code	Zip Code	LPC Priority
41	94002	3
41	94005	3
41	94010	3
41	94014	2
41	94015	1
41	94019	3
41	94020	3
41	94021	3
41	94025	3
41	94027	3
41	94028	3
41	94030	2
41	94037	3
41	94038	3
41	94044	2
41	94060	3
41	94061	1
41	94062	3
41	94063	1
41	94065	3
41	94066	3
41	94070	3
41	94074	3
41	94080	3
41	94303	2
41	94401	3
41	94402	3
41	94403	3
41	94404	3

2024-2025 CCTR (School Age) Zip Code Priorities

County Code	Zip Code	LPC Priority
41	94002	1
41	94005	1
41	94010	1
41	94014	1
41	94015	1
41	94019	1
41	94020	3
41	94021	3
41	94025	3
41	94027	3
41	94028	3
41	94030	1
41	94037	3
41	94038	3
41	94044	1
41	94060	3
41	94061	2
41	94062	3
41	94063	1
41	94065	1
41	94066	1
41	94070	1
41	94074	3
41	94080	1
41	94303	1
41	94401	1
41	94402	2
41	94403	2
41	94404	2