



Marin County Child Care Commission

2018-2019

EARLY LEARNING AND CARE

NEEDS ASSESSMENT

KEY FINDINGS



Marin County
Early Learning and Care
Needs Assessment
2018-2019

Special thanks to **First 5 Marin Children and Families Commission** for providing generous funding for this report. Based on this support, we were able to retain Mission Analytics Group, a Bay-Area based women-owned consulting firm to collaborate with our Commission in collecting the quantitative data for this needs assessment.



Over 70% of children in Marin County have all parents working

Children under the age of six in Marin County are more likely to have all parents working, 74% compared to 63% statewide.

Table 1: Marin County Children with Working Parents, 2017

Age	Number of Children in Marin County	Number with All Parents in Workforce	Share with All Parents Working
Under 6 years	14,202	10,527	74%
6 to 17 years	36,672	26,405	72%
Total	50,874	36,932	73%

Source: United States Census Bureau. (2017e).

Compared to statewide, fewer families with children under 18 in Marin County have income low enough to qualify for subsidized child care

Income Distribution of Marin County and California Families with Children Under 18, 2016

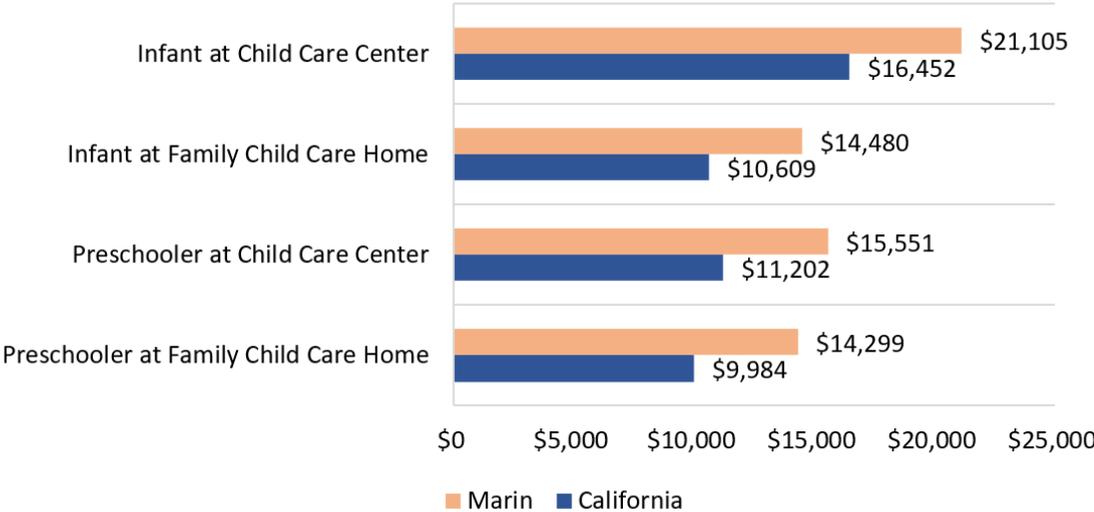
Income Category	Number of Families in Marin County	Percent of Families in Marin County	Percent of Families in California
Up to \$20,000	1,802	6%	14%
\$20,000 to \$40,000	2,537	9%	17%
\$40,000 to \$60,000	2,235	8%	14%
\$60,000 to \$100,000	4,083	14%	20%
\$100,000 to \$150,000	4,665	16%	15%
\$150,000 to \$200,000	3,720	13%	8%
\$200,000 or more	10,109	35%	10%
Total	29,151	100%	100%

Source: United States Census Bureau. (2016b).

Approximately 25% of families w/children qualify for subsidized child care compared to 43% statewide

The cost of child care was substantially higher in Marin County than in California overall

Figure 11: Cost of Child Care in Marin County and California, 2016



The average **cost for center based preschool care** was **39% higher in Marin** than statewide average. **For center-based infant care**, families may pay nearly **28% more** than the statewide average.

In Marin County, the cost of child care in 2016 was over 50% higher for compared to 2012

The county has one of the highest Self-Sufficiency Standards in the state

Table 17: Income Ceilings for Subsidized Child Care and Monthly Median Family Income Relative to Various Measures for Monthly Income for “Basic Needs” in Marin County and California, 2017 and 2018

Monthly Income for “Basic Needs”	Marin County	California
Income Cutoff for Child Care Subsidy (2018)	\$5,256	\$5,256
Monthly Median Family Income (2018)	\$9,867	\$6,458
NLIHC Housing Wage (2018)	\$10,403	\$5,665
CBP Monthly Family Budget (December 2017)		
Without Child Care	\$7,271	\$5,029
With Child Care	\$9,212	\$6,329
California Self-Sufficiency Standards (2018)		
Without Child Care	\$8,830	N/A
With Child Care	\$12,462	N/A

Source: California Department of Education. (2018d); National Low-Income Housing Coalition. (2018); California Budget & Policy Center. (2017); and Insight Center for Community Economic Development. (2018).

The median family income in Marin County is \$118,400, or \$9,867 per month, which is \$4,611 above the income ceiling for subsidized child care for a family of four

Families at the median income are earning above the income ceiling for subsidized child care, but below the Self-Sufficiency Standard.

The majority of requests for child care are for infant and toddlers (under the age of two)

Table 23: Parent Requests for Child Care, 2012 and 2016

Age	Percent of 2012 Requests	Percent of 2016 Requests	Percentage Point Change
Under 2 years	43%	48%	5%
2 – 5 years	46%	26%	-20%
6 years and older	11%	12%	1%

Child care keeps families working: 90% of families seek child care due to parent employment

There was a decline in the overall supply of child care slots in Marin County

Table 19: Number of Licensed Child Care Slots Overall, 2014 and 2017

Child Care Supply	2014	Overall ¹² 2017	% Change
Total Slots	10,714	9,957	-7%
Total Number of Sites	322	325	1%

Source: California Child Care Resource and Referral Network. (2017).

From 2014 to 2017,
the number of
child care slots
decreased by 7%.

Supply of child care slots in Marin County: Centers

Table 20: Number of Licensed Child Care Slots in Child Care Centers, 2014 and 2017

Child Care Supply	Child Care Centers		
	2014	2017	% Change
Infant/Toddler Slots ¹³	319	282	-12%
Preschool Slots ¹⁴	6,137	5,317	-13%
School-Age Slots ¹⁵	2,386	2,392	<1%
Total Slots	8,842	7,991	-10%
Total Number of Sites	153	136	-11%

Source: California Child Care Resource and Referral Network. (2017).

Child care centers experienced an overall 10% decrease in the number of child care slots, which is consistent with the 11% decrease in the number of child care center sites.

Supply of child care slots in Marin County: Family Child Care

Number of Licensed Child Care Slots in Family Child Care Homes, 2014 and 2017

Child Care Supply	Family Child Care Homes		
	2014	2017	% Change
Total Slots	1,872	1,966	5%
Total Number of Sites	169	189	12%

Source: California Child Care Resource and Referral Network. (2017).



There was a 5% increase in the number of slots in family child care homes and a 12% increase in the number of family child care home sites from 2014 to 2017.

The demand for child care is higher than the supply



Child care slots are **not** available to almost half (46%) of infants and toddlers with working parents and to about two thirds (63%) of school-aged children with working parents.

Among infant and toddlers in working families who qualify for subsidized child care (with income at/below 70% SMI), over 60% are not receiving subsidized child care.

The demand for child care is higher than the supply (cont.)

For school-aged children in working families, 54% of those who are eligible for state subsidies are not receiving subsidized child care.

Though there is a surplus of full-time preschool child care slots for working families of all incomes, there is an unmet need for part-time preschool child care slots for enrichment and school readiness



Turnover is an impactful issue at most licensed child care centers

- Almost **75%** of centers had at least one staff member quit in 2014.
- Over half (**58%**) of the staff that quit were teachers and **36%** were assistant teachers.
- Publicly funded centers had a larger percentage (**65%**) of teachers quitting in 2014.



Many child care providers struggled to cover the cost of living with current wages

- **Low wages led to many providers seeking public income support**
- **The mean hourly wage for the highest paid teachers at child care centers was \$25.46, while the mean hourly wage for the lowest paid teachers was \$17.49.**
- **The highest paid assistant teachers were paid a mean hourly wage of \$14.33, and the lowest were paid \$14.10 (2015).**



For more information, please contact the
Marin County Child Care Commission
eerickson@marinschools.org
www.marinchildcare.org
