

THE MARIN COUNTY  
CHILD CARE

# MASTER PLAN

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2008 TO 2013

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This Master Plan is a culmination of the hard work and diverse beliefs and principles of many individuals who are bound together by their common vision of all families being able to access quality child care for their children. The conduit for their efforts was a master plan workgroup convened by the Marin County Child Care Commission to develop the Master Plan for 2008 to 2013. Members of the Master Plan Committee included:

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- ❑ Mary Donovan, Program Manager, Social Services Division, Health & Human Services Department
- ❑ Ponta Ghofrani, Commission Coordinator, Marin County Child Care Commission
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- ❑ Paula Robertson, Program Manager, Marin County Children & Family Services
- ❑ Dani Tarry, County Coordinator, Marin County School Linked Services Initiative
- ❑ Tina Warren, Early Care and Education Policy Consultant
- ❑ Kay Wernert, Director, Marin Head Start

Assisting the Master Plan Committee in its work was Hatchuel Tabernik & Associates, a consulting firm that offers a complete range of planning, research, evaluation, grant writing, and training services. Team members included Tim Tabernik, Jamie Harris, and Carol Palinski Hildebrand.

The 2008-2013 Master Plan builds on the 2002-2007 Master Plan, created by the Marin Child Care Commission and Applied Survey Research.

**This report was developed with generous financial support from local child care planning grant funds from the California Department of Education.**



## INTRODUCTION AND PURPOSE

The Marin County Child Care Commission strives to lead the community in establishing and maintaining comprehensive, high quality countywide child care system. Created in July 1995, the Commission serves as an advisory committee to the Department of Health and Human Services and the Board of Supervisors, and acts as the county's state-mandated local child care planning council. As a representative body, the Commission is charged with outlining a master plan for child care in Marin County every five years.

In 2007, the Marin County Child Care Commission began preparing a new Master Plan for the period 2008-2013. The Master Plan Committee requested and received approval from the Commission to assess and report on progress made since the 2002-2007 Plan, update the needs assessment, and draft a new master plan with a deeper examination of issues related to quality child care.

The Commission retained Hatchuel Tabernik & Associates (HTA), a Bay Area-based consulting firm, to partner with the Child Care Commission's Master Plan Committee in revising the Master Plan and leading a process that included:

1. Conducting a *Needs Assessment* that involved updating our community's progress toward indicators established in the 2002-2007 Plan. This Needs Assessment implemented a new methodology for estimating demand, and enhanced the focus on quality and coordination of the child care system. This process included engaging stakeholders in understanding and interpreting the needs assessment findings through targeted outreach to community members, community forums, and surveys of child care providers.
2. *Development of the 2008-2013 Master Plan*, primarily through nine monthly Master Plan Committee meetings and a day-long planning retreat, including Commission members and other community leaders who are deeply invested in child care in Marin. Plan development also included providing information for geographic information system (GIS) mapping of county and locality-level child care on the Marin County Website.

The Master Plan for 2008-2013, therefore, presents an updated picture of the state of child care in Marin, highlighting both strengths and challenges and setting a clear course for improving the access, quality, and coordination of the child care system. For additional information on the Needs Assessment process, refer to Appendix 7 — *Data Collection Process*.



# OVERVIEW OF THE REPORT

The 2008 – 2013 Master Plan for Child Care is built upon a collaborative planning and needs assessment process, the findings of which are organized into three sections: Child Care in Marin County — The Setting, The Status of Child Care in Marin County, and Top Issues and Recommendations.

## PART 1: Child Care in Marin County — The Setting

**Part 1: Child Care in Marin County — The Setting** begins with a subsection, *The Social and Economic Context* that establishes the broad context of child care in Marin County in terms of general demographic changes and fluctuations in the regional economy, both of which impact the everyday business of providing and acquiring child care.

Part 1 develops a general *Overview of Child Care in Marin County* that describes the major types of child care. It also provides a summary of Marin Child Care Commission’s components of quality child care, built on nationally accepted norms of quality child care.

The Master Plan Committee identified *Indicators of the Child Care System* to better understand how close Marin County is to its ideal system of child care. Part 1 concludes with an overview of these 15 indicators, grouped into the three broad issue areas: Access to Child Care, Quality of Child Care, and Coordination of the Child Care System.

**Part 1 helps explain:**  
**What is important to us in child care, and why?**

## PART 2: The Status of Child Care in Marin County

Working with data collected in the needs assessment, Part 2 describes how the County’s child care system is doing. As mentioned above, this data is grouped into three issue areas:

- A. *Access to Child Care*
- B. *Quality of Child Care*
- C. *Coordination of the Child Care System*

Each issue area begins with a brief discussion about the indicators, followed by both summary and detailed descriptions of the findings from the needs assessment. The Quality of Child Care section includes a more in-depth explanation of a number of the components of quality child care, as adopted by the Child Care Commission in 2007 (Appendix 6).

**Part 2 helps explain:**  
**How are we doing?**



## PART 3: Top Issues and Recommendations

Having described the status of the system in Parts 1 and 2, Part 3 of the Master Plan explores and examines the most pressing areas for action.

Part 3 begins with *The Vision of Child Care in Marin County*, which presents the Marin Child Care Commission's ideal child care system for Marin County children, families, and providers. Next, the *Summary of Issues and Recommendations* presents the three broad issue areas, each with its own set of goals, objectives, indicators, current initiatives, and strategies for meeting the needs of the child care community.

While the goals will remain constant over the next five years, the tactics or strategies employed to achieve them may shift as the recommended strategies are implemented or modified and new opportunities arise.

It is the Commission's intent that the data, discussion, and strategies included in this report provide a clear framework for action and continuous improvement in Marin County's child care system.

Part 3 helps  
explain:

**What are the  
biggest issues?**

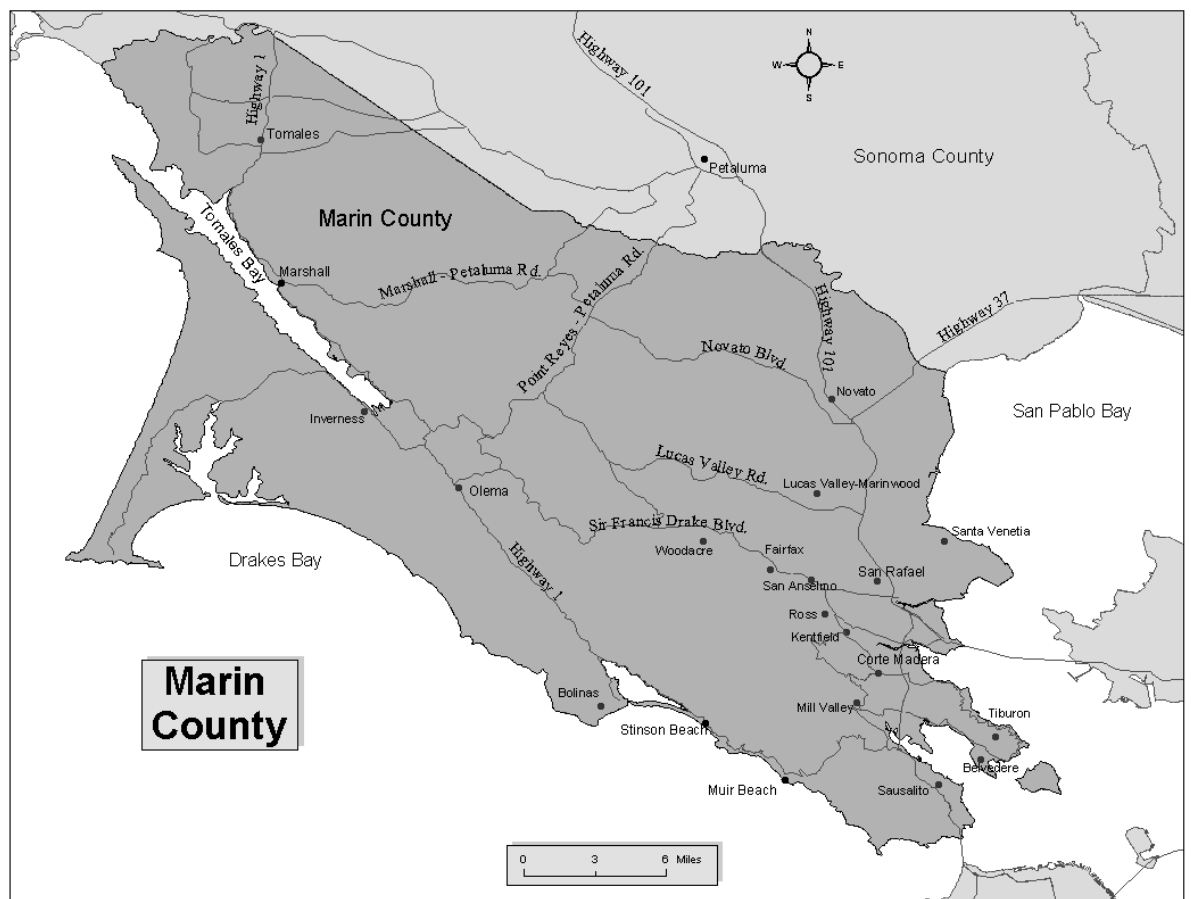
**What can we do  
about them?**





## PART 1: CHILD CARE IN MARIN COUNTY

# THE SETTING





# THE SOCIAL AND ECONOMIC CONTEXT

Marin County covers the north end of the Bay Area and has long been considered a desirable place to live for its natural beauty, small towns, cultural wealth, and open space, all in close proximity to San Francisco and other major employment centers. With nearly 85% of the county’s land protected from development, Marin County is referred to as the ‘green thumb’ of the Bay Area.<sup>1</sup>

The large proportion of land that is protected from development, combined with a high cost of living, places a significant constraint on population growth in Marin County. Since 2002, the local population has increased at a slower rate than in neighboring counties and the state overall (Figure A). The population growth rate from 2002 to 2007 was 2.4%, compared to a rate of 4.2% for 1996-2001 (as reported in the 2002-2007 Master Plan). The greatest growth within the county over the last five years has occurred in Novato and San Rafael.

**FIGURE A — POPULATION GROWTH BY AREA, MARIN COUNTY**

Area	2002	2007	2002-2007	
			% Change	Net Change
Belvedere	2,144	2,149	0.2%	5
Corte Madera	9,425	9,465	0.4%	40
Fairfax	7,356	7,375	0.3%	19
Larkspur	12,079	12,121	0.3%	42
Mill Valley	13,705	13,822	0.9%	117
Novato	48,808	52,426	7.4%	3,618
Ross	2,353	2,379	1.1%	26
San Anselmo	12,410	12,518	0.9%	108
San Rafael	56,660	58,047	2.4%	1,387
Sausalito	7,381	7,454	1.0%	73
Tiburon	8,749	8,882	1.5%	133
Unincorporated	69,202	69,344	0.2%	142
Marin County	250,090	255,982	2.4%	5,892
San Francisco County	788,971	808,844	2.5%	19,873
San Mateo County	715,072	733,496	2.6%	18,424
Sonoma County	469,014	481,765	2.7%	12,751
California	35,088,671	37,662,518	7.3%	2,573,847

Source: Department of Finance, Demographic Research Unit, E-4 Population Estimates for Cities, Counties and State, 2002-2007

While Marin County’s general population has grown, albeit at a slower rate than in neighboring counties, the proportion of the population that is under 18 years old has remained almost

<sup>1</sup>Marin County Visitor’s Bureau, February 5, 2008.



constant since 1990, at approximately 20%. Population projections to 2012 indicate that this trend will continue in Marin and around the state (Figure B).

**FIGURE B – PERCENTAGE OF POPULATION UNDER AGE 18**

County	1990	2000	2006	2012
Marin	19.1%	20.3%	19.8%	21.1%
San Francisco	16.1%	14.5%	14.8%	15.1%
San Mateo	21.9%	22.9%	23.2%	21.8%
Sonoma	24.7%	24.5%	22.8%	24.3%
<b>California</b>	<b>26%</b>	<b>27.3%</b>	<b>26.1%</b>	<b>25%</b>

Sources: U.S. Census Bureau, 2006 American Community Survey, Department of Finance Data Projections.

Figure C shows that Marin has a relatively older population, with a larger percentage of people over age 65 than in neighboring counties or statewide.

**FIGURE C — PERCENTAGE OF POPULATION OVER AGE 65**

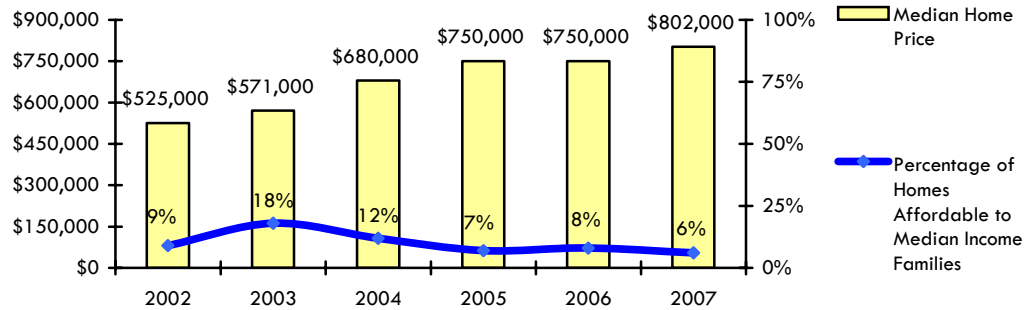
County	2006
Marin	14.9%
San Francisco	14.8%
San Mateo	13.0%
Sonoma	12.7%
<b>California</b>	<b>10.8%</b>

Source: US Census Bureau, State and County Quick Facts, 2006.

While the general and youth populations have remained relatively stable, the Bay Area economy has changed dramatically. Even with the recent slowdown in the Bay Area technology sector, the price of real estate has continued to rise. Although the downturn of the real estate market has affected virtually all of the country, the San Francisco metropolitan area — including Marin, San Francisco, San Mateo, and Redwood City — was ranked as one of least affordable places to live in the United States; in 2007, less than 6% of homes were within reach of a median income family (Figure D).



**FIGURE D — HOMES AFFORDABLE TO MEDIAN INCOME FAMILIES IN MARIN COUNTY**



Source: National Association of Home Builders, *Housing Opportunity Index*, 2007.

Furthermore, the Marin County self-sufficiency standard, which calculates how much income working adults need to meet their minimal basic needs without subsidies of any kind, is \$69,585 for a family of two adults, an infant and a preschooler.<sup>2</sup> This amount is well out of reach for the minimum wage earner salary of \$15,600. A family of four would need to earn approximately eighty percent of Marin County’s median income (\$91,200) in order to attain the self-sufficiency standard. Considering that many of Marin’s workers, including the majority of child care teachers and assistants, are not making anywhere near this median income, much less the self-sufficiency standard, it is easy to see why it is challenging for many families, including those employed by the child care industry, to come to and remain in Marin County.

<sup>2</sup> Mill Valley Chamber of Commerce, Marin County FY 2006, Median Family Income Schedule. Self-Sufficiency Standard for California, 2003. Please note self-sufficiency wage figures given are for 2003, the most recent year available, all other figures are 2006.



# OVERVIEW OF THE CHILD CARE SYSTEM IN MARIN COUNTY

The ideal child care system is one that can accommodate and serve the number of children who need care and meets the individual needs and preferences of parents. The ability of Marin County's parents to access the child care they need is dependent on several key factors: quantity of slots, quality, type of care, affordability, and coordination of the child care system.

Finding child care is the responsibility of each individual family, yet it is also in the best interest of a community to ensure that all of its children are well cared for. Studies have demonstrated the positive impacts of quality child care experiences on children's readiness for school and academic achievement, in addition to reduced special education use and grade repetition, and higher rates of high school graduation for children from a range of racial or ethnic and economic backgrounds.<sup>3</sup> Changes in family structure and neighborhood cohesion and an increased need for additional income now require many parents to pay others to care for their children while they are at work. When families can not afford the reliable, quality child care they need, it is a community concern.

What exactly is *child care*? The term is broad and includes a variety of services and organizations that educate and care for children, making it possible for parents to work or receive education or employment training. Child care arrangements fall into two categories: licensed care and license-exempt care. *Licensed care* includes most child care centers and family child care homes. These establishments face the same demands as any other small business: providing quality services to consumers at a competitive price; maintaining adequate numbers of qualified staff; and complying with state regulations. Throughout the state, there is a shortage of licensed child care slots compared to the number of children needing care.<sup>4</sup>

The second type of child care is *license-exempt care* — care that is exempt from state licensing requirements. This category includes individuals hired to come into the home to care for children (for example, a nanny, *au pair*, or neighbor); child care centers that operate in public schools; recreation programs that operate fewer than 13 hours a week or more than 12 hours a week but no longer than 12 weeks during the year (such as a summer program); drop-in arrangements such as a health club nursery or child care co-op; and family child care homes that care for children from only one family other than their own. Parents who use in-home, license-exempt care can call the Trustline Registry to check the provider's background for a criminal record.<sup>5</sup>

Of course, a significant portion of children receive *parent-only care*, meaning child care that is provided by one or more parent or guardian of a child. There are other providers as well who do

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<sup>3</sup> Cannon, Jill S., Lynn A. Karoly; Rand Labor and Population. *Who Is Ahead and Who Is Behind? Gaps in School Readiness and Student Achievement in the Early Grades for California's Children*, 2007.

<sup>4</sup> The California Child Care Portfolio 2007, California Child Care Resource and Referral Network.

<sup>5</sup> Trustline Registry may be accessed at <http://www.trustline.org> or by calling 1-800-822-8490.



not acquire the permits and licenses required by California law to care for children and are referred to in the field as *unlicensed providers*.

Some families qualify for *subsidized child care* slots, which is free or lower-cost child care for low-income parents who are working, in school, or in a training program.<sup>6</sup> This care can be provided in licensed or license-exempt private and public child care centers as well as family child care homes.

In summary, child care refers to the myriad of arrangements that parents seek to provide care and education for their children. Whether parents decide to seek licensed, license-exempt, subsidized or unsubsidized care there are guidelines for what constitutes quality care. Combining various well respected sources with the Child Care Commission's basic definition of quality child care, the Commission created "key components" of quality early care and education. These components of quality care are explored in more detail in the *Quality of Child Care* section of the plan. Essentially, child care can be of high quality in many different settings if there is caring support and interaction by an adult who is knowledgeable about child development and who provides a safe environment, rich with materials and other stimuli to help children develop cognitively, socially, physically and emotionally. Quality care helps create successful students and, eventually, strong community members.

Given the social and economic context of Marin County, how well does the current child care system accommodate the needs of parents? What types of challenges do providers face in delivering high quality child care and what are some potential solutions? How can city, county, and community based agencies facilitate the process of ensuring access to affordable, high quality, well-coordinated child care in every community? These questions and more are addressed in the remainder of this plan.

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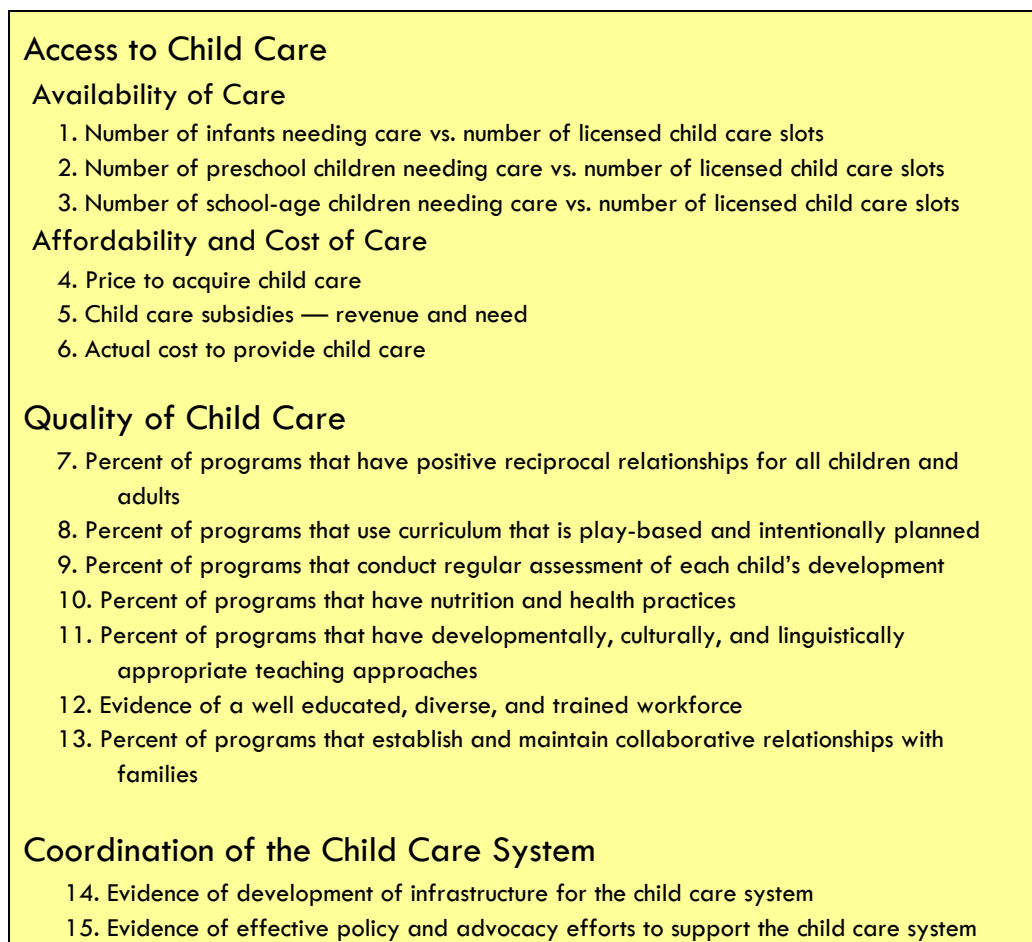
<sup>6</sup> Low-income families are defined as those earning up to 75 percent of the state median income.



# INDICATORS OF THE CHILD CARE SYSTEM

In 2008, how close is Marin County to its ideal system of child care? To answer this question, the Master Plan Committee worked with Commission members and a cross-section of stakeholders to identify the top issues and challenges within the child care system. The results can be categorized into three broad issue areas: Access to Child Care, Quality of Child Care, and Coordination of the Child Care System. Each of the issue areas has a set of indicators of the health of that component of the child care system. Clearly all of these issues are interrelated and interdependent, however for the purposes of analysis and planning, the Committee took these issues apart and examined them one by one. The next section, *Part 2: The Status of Child Care in Marin County*, presents the complete findings.

**FIGURE E – INDICATORS OF THE HEALTH OF MARIN COUNTY’S CHILD CARE SYSTEM**





**PART 2: THE STATUS OF CHILD CARE IN MARIN COUNTY**

# **THE INDICATORS**



## THE STATUS OF CHILD CARE IN MARIN – ISSUE AREA A

# ACCESS TO CHILD CARE

Ensuring access to child care requires an understanding of a complex array of issues including but not limited to supply, affordability, location, hours of operation, transportation accessibility, and type of caregiver. This section will deal with three of the most critical factors: availability of care (supply and demand), affordability, and cost of care.

However, it is important to note that having a sufficient supply of affordable child care does not guarantee that those who need care will access it. Parent needs and preferences for care are shaped by many factors, including the ages of their children, family size and structure, income level, work schedules, and their culture and beliefs about child rearing and gender roles within the family. Some parents require care because of their work situation while others are interested in exposing their child to outside enrichment and learning opportunities. Some parents would like to manage care at home by arranging work schedules with their partner or other family members, or by finding a babysitter or nanny to come to their homes. Still others prefer to take their children to licensed family child care homes or centers. To more accurately measure the demand for childcare in a community, these factors must be taken into account.

Of course, parents are not always able to make arrangements for their preferred mode of child care, and often end up choosing an alternative or creating a patchwork of arrangements that meets their price and schedule requirements. That is why the issue of “availability” of child care in the county must look at both supply (available slots) and demand, using usage patterns based on many of the factors mentioned above. The following section examines the issue of access to child care in terms of availability, as well as analyzing the affordability of care for Marin’s families.

### Availability of Care

As supply data is not available for license-exempt or unlicensed care, indicators for this section focus on licensed centers and licensed family child care homes. Data on licensed care reveals that the county’s system has shortages in both amount and types of child care available. Further, we know that some families cannot access available care because they cannot afford it and there are not enough subsidized care slots available. A more detailed discussion of this challenge can be found in the *Affordability of Care* subsection of this report.



The following table presents a summary of each of the indicators of the availability of child care in Marin:

The Indicators	How We're Doing
<p><b>1. Number of Infants Needing Care vs. Number of Licensed Child Care Slots</b></p>	<ul style="list-style-type: none"> <li>Overall, since 2001, the number of children ages 0-12 needing licensed care has increased 5% to 11,642; the number of licensed child care slots has increased 6% to 9,986.</li> <li>The biggest gains in capacity occurred with licensed child care centers — 377 slots gained. Family child care homes increased by 150 slots.</li> </ul>
<p><b>2. Number of Preschool Children Needing Care vs. Number of Licensed Child Care Slots</b></p>	<ul style="list-style-type: none"> <li>The gap between supply and demand for licensed slots decreased slightly from the year 2000 (1,673) to 2007 (1,656). The licensed child care system is generally equally able to accommodate the number of children needing care today as it was in 2000.</li> <li>There are enough licensed slots to accommodate 86% of the children needing licensed care.</li> <li>Licensed <u>infant</u> care is in short supply in Marin, with a gap between supply and demand of 139 slots. This finding is confirmed by community members who cited the difficulties of finding infant care in Marin.</li> </ul>
<p><b>3. Number of School-Age Children Needing Care vs. Number of Licensed Child Care Slots</b></p>	<ul style="list-style-type: none"> <li>For licensed <u>preschool</u> care, supply is greater than demand, with a surplus of 1,071 slots. However, not all child care slots are available full time. Preschool slots in particular are often available only for part-day enrichment care, as opposed to the full-time care slots that are needed for full-time working families.</li> <li>Licensed <u>school-age</u> care (ages 6-13) shows the greatest shortage of supply. With a gap of 2,588 between supply and demand, providers have slots to serve only about one-half of the children needing care.</li> </ul>

### *Supply and Demand Estimation Methodology*

The Master Plan Committee worked with the Marin Child Care Council to generate supply data, and partnered with Bay Area Economics (BAE) to generate child care demand data. While family employment status may be one of the major factors impacting demand, the Committee recognized that it is not the only one. Some families seek child care for enrichment purposes, particularly as their children reach preschool-age. Furthermore, families prefer different types of arrangements for their children. Understanding families’ typical usage patterns or preferences allows for a more refined demand estimate by type of care.

The demand methodology used in this Master Plan is more complex and comprehensive than the methodology used in the previous Master Plan (2002-2007). The new demand methodology provides a breakdown of the care arrangements for all children aged 0 through 12. Those arrangements, described in more detail below, include 1) licensed center-based care, 2) licensed family child care homes, 3) other care, such as in-home nannies or license exempt providers and 4) parent-only care. To generate this estimate, the model applies findings from the National Survey of American Families, a comprehensive study that surveyed over 25,000 families. The study identified four family characteristics as predictors of child care use: 1) child’s age, 2) family



income, 3) labor force participation (LFP), and 4) ethnicity.<sup>7</sup> For additional information on the demand estimation methodology used in this report, please refer to Appendix 2.

### Work-Related and Enrichment Child Care Demand

Unlike the more traditional approach for estimating demand, this demand model accounts for child care arrangements needed for all children from 0 through 12 years. *Work-related demand* refers to children in families that require child care because there is no parent at home to care for the child as a single parent or both parents are working. This is the only type of child care need traditionally included in demand estimates. *Enrichment or other demand* refers to children in families that choose child care for enrichment, socialization, and other purposes but have one or more parents not working or who are staying home and taking care of their children themselves.<sup>8</sup>

Although both types of demand are important, meeting work-related demand requires specific focus because a family with work-related demand usually does not have the flexibility to take on child care responsibilities without having to quit or change their job. Further, working families often require full-time care, as opposed to part-day care.

### Types of Care

Types of care can be broken in to three broad categories: 1) *licensed care* (which includes both child care centers and family child care homes; 2) *other care* (often referred to as license exempt care, which includes relative care outside of a child’s home and relative or non-relative care inside a child’s home); and 3) *parent only care*, which refers to care provided by one or more of the child’s parents.<sup>9</sup>

There are approximately 38,782 children ages 0-12 in Marin County. Figure F shows that licensed care (center and family child care combined) accounts for approximately one-third of demand, other care for approximately one-third, and parent-only care for approximately one-third.

**FIGURE F — ESTIMATED DISTRIBUTION OF CHILD CARE DEMAND IN MARIN COUNTY, 2007**

Primary Care Arrangement	2007	
	Number	Percent of Total
Center Care	8,699	22%
Family Licensed Care	2,943	8%
Other care	12,395	32%
Parent-only care	14,745	38%
<b>Total</b>	<b>38,782</b>	<b>100%</b>

Sources: Demand data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census Data was projected to 2007 using Department of Finance county growth rate.

<sup>7</sup> The measure used to quantify work-related demand for care is called the labor force participation rate (LFP), or the percentage of children who need care because either both their parents work full time or they live with a single parent who works full time.

<sup>8</sup> As defined in Alameda County Early Care and Education for All, Needs Assessment Report, 2006.

<sup>9</sup> Because of questions used to guide data collection regarding child care usage patterns, “other” care refers to license exempt care provided by a relative or other individual, such as a nanny or babysitter, hired to come to the child’s home or to care for the child in their home. It does not include license exempt programs that operate for limited hours at a school, recreation program or drop-in child care programs held at health clubs, co-ops, etc.

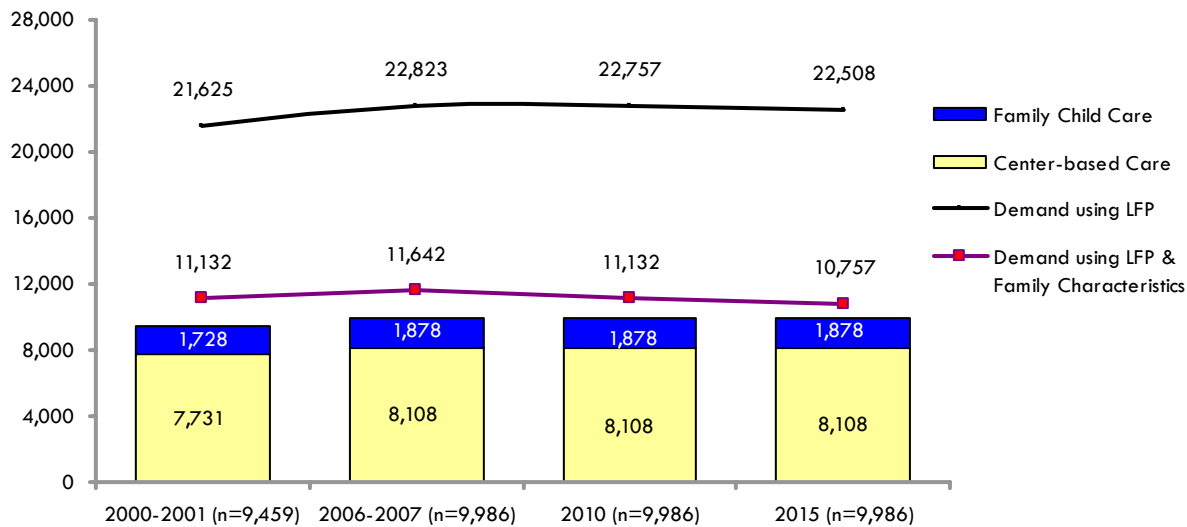


As the data shows, there is significant demand for other and parent-only care in Marin County. However, for the purposes of the Master Plan, the primary focus is on meeting the need for licensed care, recognizing that some families may prefer other types of care for their children or to provide the care themselves.

### Estimating Licensed Care Demand

Figure G shows the difference in demand for licensed care estimates applying the traditional method for estimating demand (using labor force participation only) and the new methodology (using labor force participation and family characteristics). The new methodology provides a much lower demand estimate for licensed care although in both estimates, the demand exceeds the supply of available licensed care. In light of the added sensitivity of the new methodology that allows us to factor in LFP along with specific family characteristics (child’s age, family income, and ethnicity), the remainder of this report, except where otherwise noted, will apply this methodology to the analysis of overall and licensed supply and demand at the county and locality-levels.

**FIGURE G — DEMAND FOR LICENSED CARE 2000-2015, USING LABOR FORCE PARTICIPATION (LFP) ONLY VERSUS LFP AND SPECIFIC FAMILY CHARACTERISTICS<sup>10</sup>**



Sources: Demand data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census Data was projected to 2007 using Department of Finance county growth rate.

<sup>10</sup> As supply projections are not available, supply is held constant from 2007 to 2015.



## ***Demand for Types of Licensed Care by Family Characteristics***

Family characteristics play a significant role in determining demand for licensed care, as presented in this section. Detailed tables relating to each characteristic and other types of care can be found in Appendix 3.<sup>11</sup>

### **Child's Age**

A child's age is an important factor in the type of care chosen by parents. In 2007, parents of preschool-age children were more likely to choose licensed center-based care than parents of infants or school-age children. Parents of school-age children were the least likely to use licensed family child care. These trends in demand are consistent from 2000 through projections to 2015. See Appendix 3, Figure H for additional information.

### **Income**

Slightly more than one-quarter of children (9,937) ages 0-12 in Marin are living in homes where the family income is below 200% of the federal poverty line.<sup>12</sup> These families are less likely to choose licensed center-based care than families who are above 200% of the federal poverty line. Families with incomes below 200% of the federal poverty line are equally likely to choose licensed family child care for infant and school-age care and less likely to choose licensed family child care for preschool care than are families who are above 200% of the federal poverty line. See Appendix 3, Figure I for additional information.

### **Labor Force Participation**

In 2007, there was demand for 8,295 licensed child care slots for children in families where both parents or a single parent is working. There was demand for 3,347 licensed child care slots for children in families where one or more parents are not working. As such, children in families where all parents were working accounted for 80% of the total licensed child care demand. See Appendix 3, Figure I for additional information.

### **Ethnicity**

In Marin, African American families are more likely to use licensed center-based care than other ethnic groups for all age groups and Latino families are least likely. When it comes to licensed family child care, White, Asian, and Pacific Islander families are the most likely to use licensed family child care for infant and preschool care whereas African American families are least likely. For school-age care, all ethnicities have an approximately equal likelihood of using licensed family child care. See Appendix 3, Figure J for additional information.

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<sup>11</sup> The framing of family characteristics was informed by Bay Area Economics and the *Alameda County Early Care and Education for All, Needs Assessment Report, 2006*.

<sup>12</sup> 200% of poverty for a family of 4 is \$42,400 (federal poverty guidelines, doubled). Federal poverty is \$21,200 in 2008.



### INDICATORS 1-3

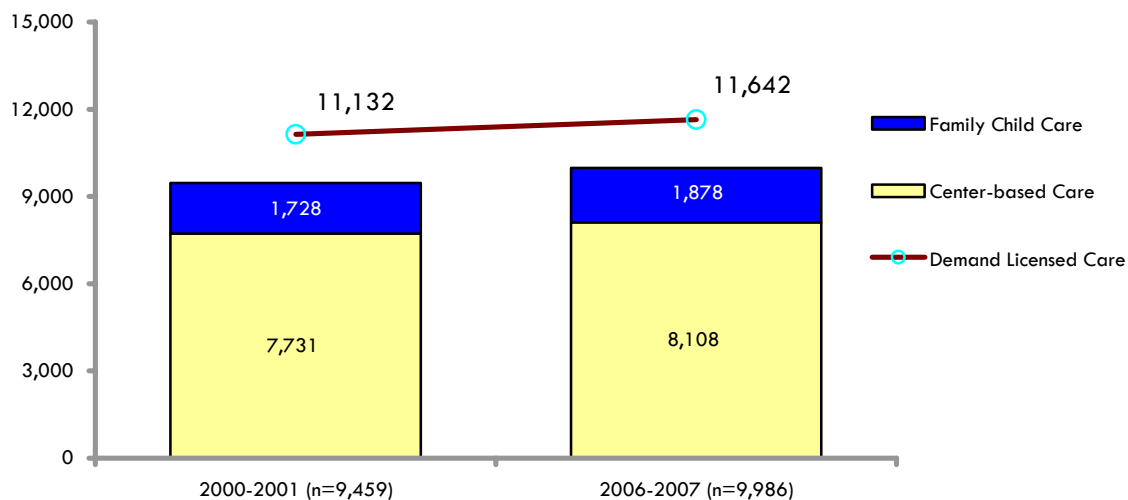
# NUMBER OF INFANTS, PRESCHOOL, AND SCHOOL-AGE CHILDREN NEEDING LICENSED CARE VS. NUMBER OF LICENSED CHILD CARE SLOTS

Does Marin County have enough supply to cover the needs for licensed child care?

The total supply of licensed child care in Marin County, including all age groups and jurisdictions, can serve 86% of children who need licensed care. Most of that licensed child care is provided by centers (81%), compared to 19% of care that is provided by family child care homes. Since 2001, the overall supply of licensed child care slots – in centers and family child care homes – has increased 6% to 9,986. Currently, there are approximately 139 licensed child care centers and 189 licensed family child care homes in Marin County, an increase from 2001 when there were 134 licensed child care centers and 177 licensed family child care homes. However, the demand for licensed child care has also grown by 5%, since 2001 (from 11,132 to 11,642).

Figure 1.1 shows how many licensed child care slots are available, compared to the number of children needing care, and how that comparison has changed over time.

**FIGURE 1.1 – NUMBER OF LICENSED CHILD CARE SLOTS IN MARIN COUNTY, 2000 – 2007**



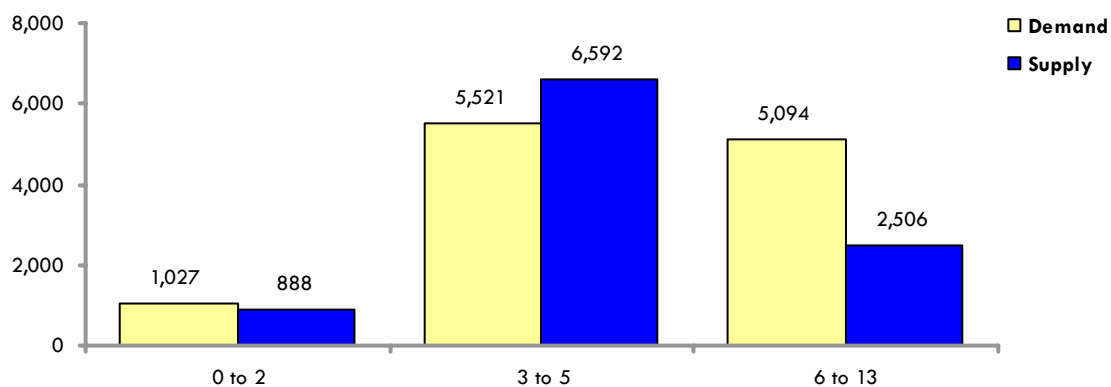
Sources: Demand data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census data was projected to 2007 using Department of Finance county growth rate. Supply data from California Child Care Resource and Referral Network 2007 Child Care Portfolio.

In 2007, the licensed child care system was *equally as able* to accommodate the number of children needing care as it was in 2001.



Does the child care gap vary by age group? Figure 1.2 shows how supply in 2007 compared to demand for child care by age group. The largest shortage in licensed care is for school-age children, for whom providers have slots to serve only about one-half of the children needing care. Infant care is also in short supply, a finding that was confirmed through the needs assessment process by child care stakeholders who cited the difficulties of finding infant care in Marin.

**FIGURE 1.2 – LICENSED CHILD CARE SUPPLY AND DEMAND IN MARIN COUNTY, NUMBER OF SLOTS BY AGES OF CHILDREN, 2006-07<sup>13</sup>**



Sources: Demand data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census data was projected to 2007 using Department of Finance county growth rate. Supply data from California Child Care Resource and Referral Network 2007 Child Care Portfolio.

As mentioned previously, the need for child care is estimated based on the child’s ethnicity, family income, and child’s age, as well as parent labor force participation rate. Because many parents seek child care in order to work, they often need full-time care.

However, not all child care slots are available full-time. Preschool slots in particular are often available only for part-day enrichment care. The vast majority of centers (115) have both full-time and part-time slots available. Data on how many part-time and full-time slots those centers have was not available, and therefore we could not calculate what percentage of overall slots in Marin are part-time. Figure 1.3 presents available data on full-time and part-time center-based care and shows that 90% of slots cannot be identified as full or part time.

<sup>13</sup> Family child care providers do not report their supply by age group. To estimate the number of children served in family child care homes by age, the proportion of infants, preschool children and school-age children were applied to total supply, as calculated in the California Early Care and Education Workforce Study, Licensed Family Child Care Providers, Marin County, 2006. This report offers a low and high estimate. For the purposes of the Master Plan, the midpoint between the two estimates was used. The percentages were calculated as 27% infants, 62% preschool children, 11% school-age children.



**FIGURE 1.3 — LICENSED CHILD CARE CENTER SUPPLY BY FULL-TIME, PART-TIME, BOTH STATUS**

	Full-Time Only n=6 Centers	Part-Time Only n=15 Centers	Both (FT & PT) n=115 Centers	Total
Infant Slots	4	16	361	381
Preschool Slots	203	451	4774	5,428
School-Age Slots	28	80	2191	2,299
Total Slots	235	547	7326	8,108
% of Total Licensed Childcare Supply	2.9%	6.7%	90.4%	100.0%

Source: California Child Care Resource and Referral Network, 2007

How does Marin County’s child care gap compare to those of other Bay Area counties? With a total of 11,642 children estimated to need licensed care, and only 9,986 licensed child care slots to accommodate them, Marin County has approximately 1.1 children for every licensed slot. Marin is slightly better able to meet the needs of children needing licensed care than is Alameda County (1.3 children for every licensed slot), which was chosen for comparison because Alameda recently used a similar methodology to estimate demand. When using a more traditional demand estimation methodology for Marin and other neighboring counties (such as San Francisco, Sonoma and San Mateo counties) and for California overall, Marin County still appears somewhat better able to meet the needs for licensed care.<sup>14</sup>

Figure 1.4 illustrates how child care supply compares to demand in various parts of Marin County. Parents who live in one zip code area may arrange child care in another zip code — either where they work or where their other children go to school – which cannot be accounted for in this zip code comparison. Nevertheless, the table below shows that there is still a shortage of licensed slots countywide.

<sup>14</sup> California Child Care Resource and Referral Network, Child Care Portfolio, 2007.



**FIGURE 1.4 – CHILD CARE GAP IN MARIN COUNTY, BY JURISDICTION, 2007**

Area—Zip Code	Supply (ages 0-12) Number of slots		Demand (ages 0-12) Number of slots		Gap in Supply and Demand <sup>15</sup>
	Licensed Center Care	Licensed Family Child Care	Licensed Center Care	Licensed Family Child Care	
Belvedere/Tiburon—94920	324	14	382	131	175
Bolinas—94924	30	8	45	16	22
Corte Madera—94925	728	190	337	126	-455
Dillon Beach—94929	0	0	12	5	17
Fairfax—94930	252	60	286	102	76
Forest Knolls—94933	0	0	34	14	49
Greenbrae—94904	206	8	327	115	228
Inverness—94937	0	0	29	11	40
Lagunitas—94938	0	0	25	8	33
Larkspur—94939	130	0	212	81	163
Marshall—94940	0	0	9	3	13
Mill Valley—94941	937	308	991	359	105
Nicasio—94946	0	0	21	7	28
Novato—94945, 94947, 94949	2,255	488	1,799	679	-264
Olema—94950	0	0	4	1	5
Point Reyes Station—94956	35	0	50	16	31
Ross—94915, 94957	20	0	n/a	n/a	n/a
San Anselmo—94960	546	114	607	217	164
San Geronimo—94963	78	0	9	3	-66
San Quentin—94964	0	0	13	5	17
San Rafael—94901, 94903	2,182	596	2,412	855	489
Sausalito—94965	293	78	366	113	108
Stinson Beach—94970	20	0	22	9	11
Tomales—94971	48	0	7	2	-39
Woodacre—94973	24	14	45	17	24
	<b>8,108</b>	<b>1,878</b>	<b>8,044</b>	<b>2,898</b>	<b>956</b>

Sources: Demand data from analysis conducted by Bay Area Economics and adapted by Hatchuel Tabernik & Associates. Demand data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census Data was projected to 2007 using Association of Bay Area Governments projections. Supply data from California Child Care Resource and Referral Network 2007  
 Notes: Demand data for Ross (94915 and 94957) are not available. Negative numbers refer to instances where more child care slots exist than is indicated by demand.

Overall, the greatest shortages of child care slots occur in San Rafael, Greenbrae, and Belvedere/Tiburon. Appendix 4 includes a more detailed profile for each locality in Marin County, with supply and demand projections, a gap analysis and basic demographic information.

<sup>15</sup> For maximum accuracy, Association of Bay Area Governments (ABAG) data was used to estimate demand by jurisdiction, whereas Department of Finance data was used to estimate demand at the county-level. Due to different methods of projecting population between ABAG and the Department of Finance, overall estimates of demand appear 6% lower at the locality-level than the county-level.



## THE STATUS OF CHILD CARE IN MARIN – ISSUE AREA A- ACCESS TO CHILD CARE

### Affordability and Cost of Care

Marin County has never been considered an inexpensive place to live; however, economic conditions in the Bay Area over the past six years have made it one of the *most* expensive places to live in the country.<sup>16</sup> How has this affected the child care market? Two measures for looking at these impacts are **affordability** and **cost of child care**.

Parents in the county face some of the highest child care prices in the state. Despite these relatively high prices, providers cannot cover their actual costs based on fees alone, and must look to additional sources, such as private fundraising, government grants, etc.

The following table presents highlights from the key indicators of this section.

The Indicators	How We're Doing
<p><b>4. Price to Acquire Child Care</b></p>	<ul style="list-style-type: none"> <li>• Marin County's market rates for center-based and family-based care for school-age, preschool and infant care are generally higher than those in surrounding counties.</li> <li>• From 2001 to 2005, the price to acquire center-based care <b>increased</b> for all age groups, with infant care being the most costly, approaching \$1,200 per month.</li> <li>• From 2001 to 2005, the price to acquire care in a family child care home <b>decreased</b> for school-age, but <b>increased</b> for preschool and <b>remained almost the same</b> for infants.</li> <li>• Median incomes in Marin County have kept pace with the cost of care. In 2001, center-based care required 24% of the median income; in 2006 it required 23%. However, combined with continued increases in housing and basic needs costs, families may not have much income left over.</li> </ul>
<p><b>5. Child Care Subsidies — Revenue and Need</b></p>	<ul style="list-style-type: none"> <li>• Following state subsidy guidelines for income eligibility, there are 7,700 children who live in families that are at or below 75% of the state median income. Of those children, 3,907 are estimated to be in families where all parents are working. As there are only 1,813 subsidized slots available, there is a significant gap of subsidized slots.</li> <li>• The greatest unmet need for subsidized care is for school-age children, followed by infants and then preschool children.</li> <li>• As of April 2008, 905 children are awaiting subsidized care on the Centralized Eligibility List.</li> </ul>
<p><b>6. Actual Cost to Provide Child Care</b></p>	<ul style="list-style-type: none"> <li>• One factor that drives up the cost of child care is that real estate costs in Marin County are among the highest in the country. The average cost of rent has steadily increased over the last five years as vacancy rates decreased. This continues a trend - reported in the previous Master Plan (2002-2007) - that has been ongoing since at least as early as 1997.</li> <li>• In many instances, parent fees do not cover the total cost of providing child care. A National Economic Development and Law Center study found that, of the revenues in the Marin child care system, about 85% come from parent fees. The remaining 15% come from government grants, business, and private fundraising efforts. Studies of other communities have confirmed that parent fees often do not cover the total cost of providing care, but also that care would likely be even more expensive if programs were to implement often costly quality measures.</li> </ul>

<sup>16</sup> National Association of Home Builders, *Housing Opportunity Index*, 2007.



## INDICATOR 4

# PRICE TO ACQUIRE CHILD CARE

Finding child care that suits their values, schedules and other needs is part of the challenge that parents face, but can they afford the care once they find it?

The California Child Care Resource and Referral Network’s Regional Market Rate Survey for California reports that in 2005, the average monthly cost for infant care in Marin was \$1,192 per month in centers and \$820 in family child care homes. Infant care is generally more expensive to provide because it is more labor intensive; teacher-to-child ratios for infant care are lower than they are for preschool-age children. Preschool care is reported to be slightly less expensive, at an average of \$864 a month in centers and \$764 in family child care homes. School-age care is least expensive, at an average of \$624 a month in child care centers and \$597 in family child care homes (after school hours only). Figures 4.1 and 4.2 present the average fees for center-based and family child care over time in Marin and neighboring counties.

**FIGURE 4.1 – AVERAGE MONTHLY FEE OF CENTER-BASED CHILD CARE, BY COUNTY**

County	1997	2001	2005	2001-2005 % Net Change
<b>Marin</b>				
Infant	\$731	\$899	\$1,192	33%
Preschool	\$602	\$705	\$864	22%
School-age	\$407	\$530	\$624	18%
<b>San Francisco</b>				
Infant	\$790	\$1,041	\$1,071	3%
Preschool	\$557	\$672	\$788	17%
School-age	\$461	\$446	\$588	32%
<b>San Mateo</b>				
Infant	\$733	\$995	\$1,163	17%
Preschool	\$538	\$649	\$813	25%
School-age	\$406	\$448	\$585	30%
<b>Sonoma</b>				
Infant	\$594	\$677	\$856	26%
Preschool	\$462	\$540	\$622	15%
School-age	\$399*	\$460	\$501	9%

Source: California Child Care Resource and Referral Network, Regional Market Rate Survey for California Child Care Providers, Mean Rates for Child Care, 1997, 2001, and 2005.

\*Monthly estimates calculated using mean weekly rate multiplied by 52 (weeks per year), then divided by 12 (months per year).



**FIGURE 4.2 – AVERAGE MONTHLY FEE OF FAMILY-BASED CHILD CARE, BY COUNTY**

County		1997	2001	2005	2001-2005 % Net Change
<b>Marin</b>					
	Infant	\$610	\$810	\$820	1%
	Preschool	\$592	\$650	\$764	18%
	School-age	\$313*	\$667	\$597	-10%
<b>San Francisco</b>					
	Infant	\$575	\$718	\$803	12%
	Preschool	\$561	\$744	\$734	-1%
	School-age	\$435	\$655	\$591	-10%
<b>San Mateo</b>					
	Infant	\$527	\$804	\$770	-4%
	Preschool	\$537	\$698	\$705	1%
	School-age	\$521	\$597	\$590	-1%
<b>Sonoma</b>					
	Infant	\$420	\$579	\$675	17%
	Preschool	\$403	\$642	\$627	-2%
	School-age	\$410*	\$603	\$547	-9%

Source: California Child Care Resource and Referral Network, Regional Market Rate Survey for California Child Care Providers, Mean Rates for Child Care, 1997, 2001, and 2005.

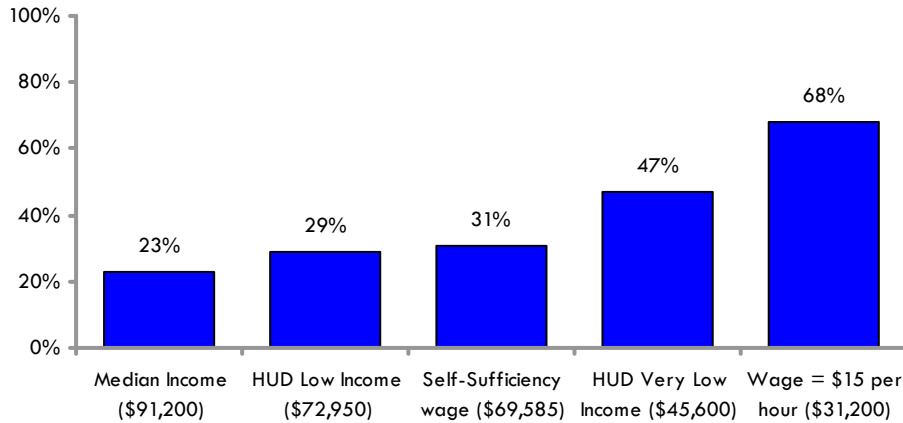
\*Monthly estimates calculated using mean weekly rate multiplied by 52 (weeks per year), then divided by 12 (months per year).

These child care market survey data demonstrate that the costs for all types of school-age care, along with the costs of center-based preschool and family child care for infants are higher in Marin County than they are in three neighboring counties.

How have these prices impacted parents? Figure 4.3 shows the percentage of income spent on child care by families at various income levels. These levels have remained very similar to those reported in the previous Master Plan.



**FIGURE 4.3 – PERCENTAGE OF ANNUAL INCOME NEEDED TO PAY FOR CARE FOR 1 INFANT AND 1 PRESCHOOLER, AT VARIOUS FAMILY INCOME LEVELS – 2006\***



Source: California Child Care Resource and Referral Network, Regional Market Rate Survey for California Child Care Providers, Mean Rates for Child Care, 2001; Californians for Family Economic Self-Sufficiency/Equal Rights Advocates, The Self-Sufficiency Standard for California, 2003. Marin County FY 2006 Median Family Income Schedule, Mill Valley Chamber of Commerce, Marin County FY 2006, Median Family Income Schedule, [www.millvalleycommunity.org/docs/housingincomelevels.pdf](http://www.millvalleycommunity.org/docs/housingincomelevels.pdf).

\* Assuming infant and preschool care are center-based (\$21300) and cost is shared between two wage earners (four-person household). Please note self-sufficiency wage figures given are for 2003, the most recent year available. All other figures are for 2006.

In 2006, a median-income family with one infant and one preschooler in Marin County paid about 24% of its annual income of \$91,200 for center-based care. Meanwhile, a family earning between the self-sufficiency wage (\$69,585 annually) and HUD low-income wage (\$72,950 annually) paid about one-third of its income for child care. Parents earning what HUD considers *very low income* — about \$22 an hour between two parents — would have paid nearly half (47%) of their income for center-based infant and preschool care. Finally, a family or a single parent earning \$15 an hour, or about \$31,200 a year, would have paid 68% of their income for child care. In summary, faced with the choice of spending large portions of their income on licensed child care, lower-income families often have to seek alternative, more affordable child care arrangements.

The high-cost of living in Marin County adds to the challenge of affording child care. According to the 2007 Marin Child Care Portfolio, minimum wage earners (\$15,600 annually) would have to pay 130% of their salary just on housing, leaving nothing left over to pay the estimated \$10,452 needed to pay for an infant/toddler in a family child care home. Entry-level public school teachers with an infant/toddler in a child care center pays 55% of their annual salary in housing and 40% for child care, leaving only 5% of their income left over for all other family needs.



## INDICATOR 5

# CHILD CARE SUBSIDIES – REVENUE AND NEED

For both providers and parents, subsidies are one way to mitigate the expense of child care in a county with a high cost of living, such as Marin. Subsidies designed to stabilize or reduce operating costs for providers include grants for infrastructure enhancement, rent, programs, or facilities. Subsidies intended to ease the expense of child care for parents include voucher systems, alternative payments, and sliding scale fee schedules.

While complete data about child care subsidies is difficult to come by, the Marin County Child Care Commission estimated that in 2006-2007 the county received \$15,138,950 from the California Department of Education, Head Start, and CalWORKs to provide support to both parents and providers. Marin County parents receive subsidies either through Marin County's state or federally subsidized centers, or through vouchers given to them directly.

How well are these parent subsidy dollars meeting the demand for subsidized child care? Continuing the trend reflected in the 2002-2007 Master Plan, preliminary evidence indicates that there is not enough subsidized care in Marin County to meet the demand.

A special census data run sponsored by the California Child Care Coordinators Association provides data on the demand for subsidized care in Marin County (See Appendix 5 for detailed data tables). The data run takes into account both labor force participation and income to estimate subsidized demand. This demand estimation combined with the number of subsidized slots in Marin County reveals that there are not enough subsidy dollars for all children who are eligible for and needing subsidized care. In 2007, there were an estimated 3,907 children who were eligible for and needing subsidized care and only 1,813 slots available to meet this need.<sup>17</sup> As seen in Figure 5.1, in 2007 there were an estimated 2,094 children who could not be accommodated.

Many child care experts in the Bay Area believe that the real need for subsidized care is significantly underestimated because income eligibility guidelines are based on state and federal limits, rather than considering the realities of a high cost county like Marin.

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<sup>17</sup> Eligibility estimates include the number of children in families where all parents are working and where the families are earning under 75% of the State Median Income for their family size. The estimates are considerably higher when LFP is not factored in as an indicator of which families may be seeking subsidized care. Appendix 5 includes tables showing subsidized demand estimates with and without LFP.



**FIGURE 5.1 – ESTIMATED UNMET NEED FOR SUBSIDIZED CHILD CARE, 2007** <sup>18, 19, 20</sup>

Area/Zip Code	Unmet Need (Infant)	Unmet Need (Preschool)	Unmet Need (School-Age)	Unmet Need Total
Belvedere/Tiburon – 94920	-3	23	24	45
Bolinas – 94924	0	5	32	37
Corte Madera – 94925	-7	-4	46	35
Greenbrae – 94904	-1	23	1	23
Fairfax – 94930, 94978	-8	4	97	93
Forest Knolls – 94933	0	-1	-1	-2
Inverness – 94937	0	0	0	0
Lagunitas – 94938	4	3	13	20
Larkspur – 94939	19	0	4	23
Mill Valley – 94941, 94942	10	28	117	156
Novato – 94945, 94947, 94948, 94949	37	-43	435	430
Point Reyes Station – 94956	-1	9	41	49
San Anselmo – 94960	10	6	193	209
San Geronimo – 94963	-1	0	0	-1
San Rafael – 94901, 94903, 94912, 94915	83	-46	586	623
Sausalito – 94965, 94966	1	17	152	170
Stinson Beach – 94970	4	4	19	27
Woodacre – 94973	11	33	13	56
San Quentin 94964	0	-2	0	-2
Nicasio 94946	-1	-2	0	-3
Other	32	21	54	106
<b>Total</b>	<b>189</b>	<b>78</b>	<b>1,827</b>	<b>2,094</b>

Sources: Supply data is based on CalWORKS, Head Start, and California Department of Education-funded capacity. Demand analysis conducted by the US Census Bureau, 2007.

The Budget Act of 2006-07, AB 1801 authorized and funded a Centralized Eligibility List (CEL) for every local Alternative Payment Program and requires all childcare and development contractors to participate in the CEL, with some exemptions. Parents now apply once to all state-funded programs. Marin Head Start and College of Marin may also access this list.

**What is the Centralized Eligibility List?** A single, countywide list of all children from income eligible families who are waiting for subsidized childcare.

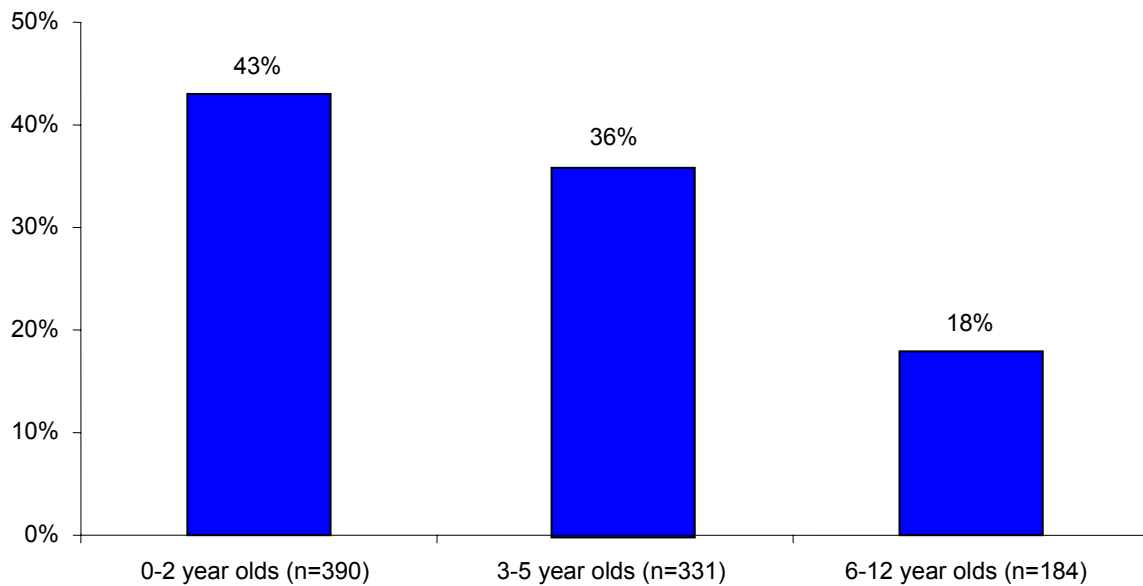
18 A negative value indicates that there are more children being served in subsidized slots than there are eligible children in that zip code area.  
 19 Demand is based on Census 2000 data from a special data run sponsored by California Child Care Coordinators Association. Data for Ross and Marshall are not available.

20 Demand data for Figure 5.1 takes income and labor force participation rate of parents in to account. See Appendix 5 for data tables detailing demand based on income level versus demand based on income level and labor force participation. Also included in Appendix 5 is additional detail on subsidized supply by Marin County jurisdictions.



As of April 2008, 905 children were on the Centralized Eligibility List waiting for subsidized care. Figure 5.2 below shows the current age breakdown and percentages of children on the CEL; with the greatest number of children awaiting care being infants, followed by preschool children and then school-age children. The number of children on the list is consistently increasing as eligible parents learn about the CEL and add their child's names to the list.

**FIGURE 5.2 – PERCENTAGE OF CHILDREN ON CENTRALIZED ELIGIBILITY LIST BY AGE GROUPS**



Source: Marin Child Care Council, as of April 1, 2008.

Further indication that there is a gap between the supply and demand of subsidized slots comes from a recent survey of 574 parents whose children receive subsidized care.<sup>21</sup> Over half (57%) of respondents reported that it took more than a month to find care.

As awareness of the existence of the CEL continues to grow and parents continue to add their children to the list, it will be interesting to see if the numbers of children in each age group more closely align to the estimated gaps in supply as presented in table 5.1. The consistent message across both data sources, however, is that Marin County has a shortage of subsidized care slots, compared to the need that exists among children in all age groups.

<sup>21</sup> Philliber Research Associates, 2008



## INDICATOR 6

# ACTUAL COST TO PROVIDE CHILD CARE

How much does it cost to provide child care in Marin County? Are parent fees able to cover these costs?

Determining the actual cost to provide care, or the amount of revenue that child care providers in Marin County need in order to provide quality care, is challenging. General proxy measures are available, such as the average rent per square foot of real estate, but they don't tell the whole story because they do not account for insurance costs, salary costs, staff development, materials, and other expenses.

There is evidence that, despite the high prices parents pay for care (Indicator 4), their fees do not cover the actual cost of care. One study conducted by the National Economic Development and Law Center found that 85% of Marin County's child care system revenues come from parent fees. The remaining 15% come from government grants, business contributions, and private fundraising efforts.<sup>22</sup> Fees for infant care may fall even shorter of covering the actual cost of care due to the lower staff to infant ratios required by law. Another study completed in 2004 in Massachusetts confirmed that while the majority of centers' revenues come from parent fees (67% for infant centers, 70% for toddler centers) a significant portion of the remaining costs (26% and 27%, respectively) come from government subsidies.<sup>23</sup>

Other studies have attempted to estimate the true cost of quality care.<sup>24</sup> A 2002 study completed in Santa Clara County assumed upgrades to the quality of child care such as lower staff to child ratios and higher teacher wages and estimated that the average true cost per child per month was \$1,525, or \$18,300 per year. The study went on to conclude that the Santa Clara system is under-funded in total by approximately 48%. Another study completed in Long Beach in 2006 developed a prototype center that included various quality upgrades and determined that, on average, staffing alone for this prototype would require 83% of the budget.<sup>25</sup>

Conversations with a number of child care centers in Marin County affirm these study findings and highlight one of the defining factors embedded in the price and cost of care issue: child care providers cannot recover from consumers the actual cost of providing child care. If providers cannot fill the cost gap from other sources, such as grants or in-kind subsidies (e.g., discounted or free operating space) or by reduced staffing and salary costs, they will go out of business.

What factors are driving up the actual cost to provide care? One of the primary causes is the high cost of residential and commercial real estate in Marin County, which translates to higher facility costs and higher cost of living for child care staff. Figure 6.1 illustrates the combined

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<sup>22</sup> National Economic Development and Law Center. *The Economic Impact of Child Care in Marin County*, 1998

<sup>23</sup> Center for Research on Women. *The Cost and Quality of Full-Day Year-Round Early Care and Education in Massachusetts: Infant and Toddler Classrooms*, 2004.

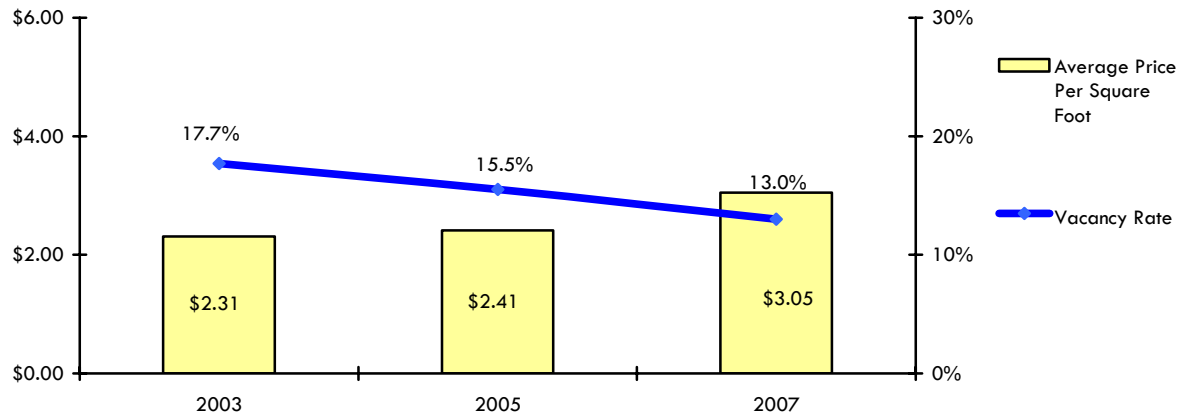
<sup>24</sup> Local Child Care Planning Council of Santa Clara County and Local Investment in Child Care Project. *The True Cost of Quality Care: Financing Strategies for Silicon Valley*, July 2002.

<sup>25</sup> Long Beach Early Care and Education Committee. *Economic Model of Quality Early Care and Education: What does quality cost?*, 2006.



average rent per square foot for Class A and Class B commercial space in various parts of Marin County compared to the vacancy rate for the same real estate.

**FIGURE 6.1 – AVERAGE RENT PER SQUARE FOOT AND VACANCY RATE, MARIN COUNTY**



Source: Orion Partners, Office Market Report, End of Year, 2003, 2005, Third Quarter, 2007

Area	2003	2005	2007
Southern Marin	\$2.70	\$2.77	\$3.22
Central Marin	\$2.73	\$2.74	\$3.22
Central San Rafael	\$2.39	\$2.39	\$2.66
North San Rafael	\$2.07	\$2.26	\$2.43
Novato	\$2.06	\$2.08	\$1.74
<b>Marin Total</b>	<b>\$2.31</b>	<b>\$2.41</b>	<b>\$3.05</b>
<b>Overall Vacancy Rate</b>	<b>17.7%</b>	<b>15.5%</b>	<b>13.0%</b>

Source: Orion Partners, Office Market Report, End of Year, 2003, 2005, Third Quarter, 2007.

Figure 6.1 shows that the average cost of rent has steadily increased over the last five years as vacancy rates have decreased. This continues a trend — as reported in the 2002-2007 Master Plan — that has been ongoing since at least as early as 1997. According to Orion Partners, even with rising lease rates of Class A properties, the Marin office market continues to report high levels of tenant demand. The county-wide vacancy rate has also remained low. After the rapid downsizing of the technology sector in the early part of the decade led to an increase in the commercial vacancy rate and a slight decrease in average rents per square foot, the rental rates per square foot have climbed back up to \$3.05 per square foot. By the third quarter of 2007, the vacancy rate for Class A and Class B real estate had declined to 13%.



For child care centers or family child care providers who own the site on which they operate, the rising costs per square foot and decreasing vacancy rates have not had much impact. But those providers who rent or lease their work space — particularly those with short-term or year-to-year leases — have certainly been affected by the last several years of rising commercial lease and residential rates. This has affected center-based and home-based providers alike.

For businesses operating in Marin County — including private sector child care providers — the most practical way to survive in such a market is to reduce operating costs (such as teacher salaries) or pass costs on to consumers (raise prices). Unfortunately, with rapidly rising fuel and food prices added to the high cost of housing, cuts to the already low salaries of child care staff would likely make it impossible for staff to remain in their jobs. Further, most consumers can only pay up to a certain limit before having to move on to another provider who they hope can give them acceptable service for a better price.

## Access to Child Care Summary

The data presented for this issue area is an initial effort to measure certain components of access to child care in Marin County, namely availability, affordability and cost of care. In addition to these components, various other components should be assessed in the future, such as hours of operation, location and transportation accessibility, type of caregiver, and parent needs and preferences.

Overall, the efforts to promote access to child care in Marin County have paid off with regard to availability of child care. The gap between supply and demand has not narrowed, but neither has it expanded. However, considering the persisting gap between supply and demand, further efforts are needed to address this challenge.

Marin continues to be a relatively expensive place, both for parents to find child care and for providers to operate. With the high cost of child care in Marin and a continued shortage of subsidized child care, the need for affordable and subsidized care is as pressing as ever. Furthermore, based on studies indicating that parent fees often do not cover providers' expenses, many providers are left to rely on government subsidies and other outside funding sources to make ends meet, which effectively makes it difficult for them to consider lowering their rates. With an increased push to provide high-quality care, which often requires additional funds, some providers may even feel pressure to further raise parent fees. As such, issues of both affordability and the high cost of child care will need significant attention in the coming years.



## THE STATUS OF CHILD CARE IN MARIN – ISSUE AREA B

# QUALITY OF CHILD CARE

For the 2008-2013 Master Plan, the Committee chose to enhance the Master Plan’s focus on quality to reflect the growing awareness of the impact that key components of quality care have on young children’s development.

Combining various well-respected sources with the Child Care Commission’s basic definition of quality child care, the Commission identified these “key components” of quality early care and education (Appendix 6)<sup>26, 27</sup>. These components of quality care will serve as the conceptual framework for future work on developing or advocating for quality early care and education. The quality components also served as a guide for the development of indicators for this portion of the plan.

The Marin Child Care Commission has continued to seek community input to further develop and refine the key components. Thus far, the Commission has received positive feedback about the components in public meetings and through conversations with key stakeholders.

### **Efforts to collect additional data on quality of child care**

Given the enhanced focus on quality, the needs assessment included several strategies for collecting data on the quality of child care in Marin County.

**Quality Survey** — The Master Plan Committee developed a survey for center directors focused specifically on quality. It was sent to 367 licensed centers and family child care providers. The survey had a low response rate of 33 respondents, though at least one respondent was replying on behalf of the multiple centers that she oversees. Respondents were primarily from licensed centers (94%).

**Provider Survey** — The Marin Child Care Council distributed a survey to 367 child care providers. It achieved a response rate of 125, with about half from centers (n=60) and half from family child care homes (n=65).

**California Early Care and Education Workforce Study** — Although not carried out specifically for the Master Plan, the 2006 California Early Care and Education Workforce Study, Marin County, conducted by the Center for the Study of Child Care Employment and the California Child Care Resource and Referral Network served as a key source of data relating to the quality of child care. The study collected data from ECE providers--94 licensed family child care homes and 63 centers.

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<sup>26</sup> Marin County Child Care Commission, *Marin’s Child Care Challenge: Finding the People and Places to Care For Our Children*, December, 1999. Definition: “Children need safe, clean and stimulating physical environments, and consistent, trusting relationships with trained caregivers”

<sup>27</sup> The Commission relied primarily on (1) *High Quality Preschool: Why We Need It and What it Looks Like* by Linda M Espinosa, Issue 1/November 2002, National Institute of Early Education Research and (2) NAEYC’s Program Standards (10 standards that define excellent programs and reflect NAEYC’s Accreditation system), <http://www.naeyc.org/academy/standards/>



**Stakeholder Input** — The Master Plan Committee gathered input from a variety of stakeholders to delve more deeply into specific questions about quality. Respondents included school principals, a program director of a community-based organization, a coordinator of a countywide child care program, family advocates, a school readiness coordinator, and a public health nurse.

Stakeholder input confirmed the need for strengthening Marin County’s efforts to improve the quality of child care. Those key informants cited various ways that the quality of child care has an impact on the work that they do, for example, high quality child care is a critical means of family support and is essential in helping children become better prepared for school.

While the responses do not by any means represent all of the child care providers in the county, they do provide a window into both program practices and staff development related to quality.

Seven indicators were developed to assess the status of quality of care in Marin County. The following table presents a summary of the indicators.

The Indicators	How We’re Doing
<p><b>7. Percent of programs that have positive reciprocal relationships for all children and adults</b></p>	<p><b>Adult:Child Ratio</b></p> <ul style="list-style-type: none"> <li>• 100% providers who responded to the Providers Survey meet the minimum licensing adult:child ratios.</li> <li>• 36% of infant care center providers who responded to the Providers Survey provide care at the National Association for the Education of Young Children (NAEYC) recommended ratio of 1:3.</li> <li>• 44% of toddler care center providers who responded to the Providers Survey provide care at the NAEYC recommended ratio of 1:4.</li> </ul> <p><b>Group Size</b></p> <ul style="list-style-type: none"> <li>• 100% of providers who responded to the Providers Survey meet the group size required for licensing.</li> <li>• 73% of infant care center providers who responded to the Providers Survey were at or below the maximum NAEYC recommended group size of eight.</li> <li>• 77% of toddler care center providers who responded to the Providers Survey were at or below the maximum NAEYC recommended group size of 12.</li> <li>• 55% of preschool-age center providers who responded to the Providers Survey were at or below the maximum NAEYC recommended group size of 20. State funding is based on a group size of 24; an additional 16% of respondents provide care at this group size.</li> </ul> <p><b>Staff-Child Interactions</b></p> <ul style="list-style-type: none"> <li>• Early Childhood Environmental Rating Scale (ECERS) data collected from 14 centers indicate that improvements could be made in staff-child interactions. Just over one-third (36%) of centers scored above the “acceptable score” of 4.5.</li> </ul>



The Indicators	How We're Doing
<p><b>8. Percent of programs that use curriculum that is play-based and intentionally planned.</b></p>	<ul style="list-style-type: none"> <li>All Quality Survey respondents said they use a defined curriculum model/approach. However, the type of curriculum differs significantly across centers, with the highest percentage of respondents (28%) reporting they have a self-designed curriculum, followed by 16% using "theme-based" curriculum. More information is needed to understand what these models entail and how they are being applied.</li> <li>Two-thirds (66%) of Quality Survey respondents reported that they are "very interested" or "somewhat interested" in further developing the curriculum component of their programs.</li> </ul>
<p><b>9. Percent of programs that conduct regular assessment of each child's development</b></p>	<ul style="list-style-type: none"> <li>84% of respondents to the Quality Survey and 64% of respondents to the Providers Survey conduct regular formal or informal assessments of children in their care.</li> <li>96% of Quality Survey respondents reported that child assessment is useful for program improvement; the most commonly cited uses are "to provide parents with feedback on their child" and "to better address the needs and strengths of children."</li> <li>62% of Quality Survey respondents reported that child assessments are "very important" in guiding daily activities with children.</li> </ul>
<p><b>10. Percent of programs that have nutrition and health practices</b></p>	<ul style="list-style-type: none"> <li>The majority of programs responding to the Quality Survey either do not offer regular screenings or only offer them occasionally. The most commonly offered screenings are vision, with 46% of survey respondents, followed by developmental (24%) and dental (21%).</li> <li>The majority of Quality Survey respondents felt that health and nutrition are "very" (55%) or "somewhat" (28%) integrated in to the program's curriculum and/or activities.</li> <li>63% of Quality Survey respondents would be likely to use health consultation if it were provided at an affordable cost.</li> </ul>
<p><b>11. Percent of programs that have developmentally, culturally and linguistically appropriate teaching approaches</b></p>	<p><b>Serving Dual Language Learners*</b></p> <ul style="list-style-type: none"> <li>Just over one third (36%) of centers employ at least one teacher with relevant non-credit training in supporting dual language learners. Eighteen percent of centers employ at least one teacher with relevant college coursework.</li> </ul> <p><b>Serving Children with Disabilities and Other Special Needs*</b></p> <ul style="list-style-type: none"> <li>Nearly half (47%) of licensed providers have relevant non-credit training in working with children with special needs; 20% have completed relevant college coursework.</li> <li>Nearly three-quarters (74%) of centers employ at least one teacher with relevant non-credit training in working with children with special needs; 59% employ at least one teacher with relevant college coursework.</li> </ul> <p><b>Serving the Mental Health Needs of Children</b></p> <ul style="list-style-type: none"> <li>42% of Quality Survey respondents reported asking one or two children to leave the program within the past year due to behavior issues.</li> <li>45% of Quality Survey respondents have received training in early childhood mental health, while 83% would be interested in receiving training.</li> </ul> <p><i>* Data from the California Early Care and Education Workforce Study, 2006.</i></p>
<p><b>12. Evidence of well-educated, diverse, and trained workforce</b></p>	<p><b>Education Level of Program Staff*</b></p> <ul style="list-style-type: none"> <li>48% of ECE teachers hold a BA or higher (although not necessarily in ECE or a related field).</li> <li>Half of center teachers with an AA degree or higher also hold a child development permit.</li> </ul>



The Indicators	How We're Doing
	<ul style="list-style-type: none"> <li>87% percent of centers employ at least one teacher with a BA or higher degree.</li> </ul> <p><b>Meeting Language and Cultural Needs of Children*</b></p> <ul style="list-style-type: none"> <li>Family child care providers and assistant teachers are nearly twice as likely as teachers and directors to be able to communicate in a language other than English.</li> <li>Center assistant teachers are the most likely to be women of color (43%), followed by family child care providers (34%) and then center teachers (23%).</li> </ul> <p><b>Teacher Salaries and Staff Turnover*</b></p> <ul style="list-style-type: none"> <li>Child care teachers' turnover rates are 22%, which is twice that of elementary school teachers. Assistant teacher turnover is also high, at 18%. Turnover rates for directors are extremely low, at less than 1%.</li> <li>Center staff in more senior-level positions are more likely to have been at their current centers for 5 or more years. This is the case for 26% of assistant teachers, 46% of teachers, and 77% of directors.</li> <li>There are a good number of family child care providers who have provided care for three years or less (26%), as well as a good number who have provided care for 18 years or more (27%).</li> <li>From 2000-2006, the average hourly rate for the highest paid teachers increased proportionally more than the increase of the self-sufficiency rate (34% vs. 24%). However, this increase still does not ensure self-sufficiency. The average hourly wage for centers' highest-paid teachers is \$19.94/hour, which is above the 2006 self-sufficiency wage for a single person with no dependents in Marin County (\$13.90/hr), though far below the self-sufficiency wage for an adult with an infant and preschooler (\$32.22).</li> </ul> <p><i>* Data from the California Early Care and Education Workforce Study, 2006.</i></p>
<p><b>13. Percent of programs that establish and maintain collaborative relationships with families</b></p>	<p><b>Family Involvement</b></p> <ul style="list-style-type: none"> <li>63% of programs responding to the Quality Survey report having dedicated staff or staff time to family involvement and support.</li> <li>The most commonly cited family involvement and support activities provided by centers include family members participating in program activities (86%), parent conferences (82%) and parent networking and support (79%).</li> </ul> <p><b>Parent Perception of Quality</b></p> <ul style="list-style-type: none"> <li>Benefits for Children             <ul style="list-style-type: none"> <li>A survey recently conducted by Philliber Research Associates (2007) of parents in subsidized programs found that that 94% of parents felt the child care programs helps or will help prepare their child to succeed in school. Likewise, the vast majority of parents (94%) were satisfied with the overall quality of the program.</li> <li>The Philliber Research Associates survey reported that 85% of parents felt that their child was "happy" or "very happy" in the program.</li> </ul> </li> <li>Benefits for Parents             <ul style="list-style-type: none"> <li>78-80% of parents responding to the Philliber Research Associates survey felt the child care program makes it easier for them to keep a job or attend an educational or training program.</li> <li>Eighty-nine (89%) of parents responding to the Philliber Research Associates survey felt more confident as a parent as a result of being a part of the child care program.</li> </ul> </li> </ul>



## INDICATOR 7

# POSITIVE RECIPROCAL RELATIONSHIPS

One of the components of quality is to promote positive reciprocal relationships for all children and adults. Do Marin’s child care program staff, structures and systems indeed encourage these positive relationships?

In addition to looking at staff-child interaction, this indicator focuses on an important precursor to establishing positive relationships — the adult:child ratio. For a high quality program, the National Association for the Education of Young Children (NAEYC) recommends ratios that are lower than those required by Community Care licensing: 1:3 for infants, 1:4 for toddlers, 1:8 for preschoolers, and 1:18 for school-age children.<sup>28</sup>

### *Adult-Child Ratio and Group Sizes*

The Provider Survey conducted by the Marin Child Care Council found that all respondents are providing care in compliance with licensing requirements for adult:child ratios and group sizes.

In addition, 36% of infant care providers who responded are providing care below the state required ratio at the NAEYC recommended ratio of 1:3. Forty-four percent (44%) of toddler care providers who responded are providing care below the required ratio at the NAEYC recommended ratio of 1:4.<sup>29</sup>

When asked about their maximum group size, 73% of infant center providers, 77% of toddler center providers and 55% of school-age center providers reported being at or below the maximum recommended NAEYC group sizes of eight, 12 and 20 respectively. The staffing qualifications and requirements in state subsidized programs indicate that maintaining a group size of 24 is the best way to maximize resources. An additional 16% of respondents provide preschool care at this group size.

Early Childhood Environmental Rating Scale (ECERS) data collected from 14 centers indicate that improvements could be made in staff-child interactions.<sup>30</sup> Just over one-third (36%) of centers scored above the “acceptable score” of 4.5 (out of 7 possible).

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28 National Association for the Education of Young Children, [http://www.naeyc.org/academy/criteria/teacher\\_child\\_ratios.html](http://www.naeyc.org/academy/criteria/teacher_child_ratios.html).

29 The maximum ratio allowed by licensing for infant care is 1:4. Data was not collected in a way that allowed measurement of ratios for preschool and school-age children.

30 The staff-child interactions area included supervision of gross motor activities, general supervision of children, discipline, staff-child interactions and interactions among children.



## INDICATOR 8

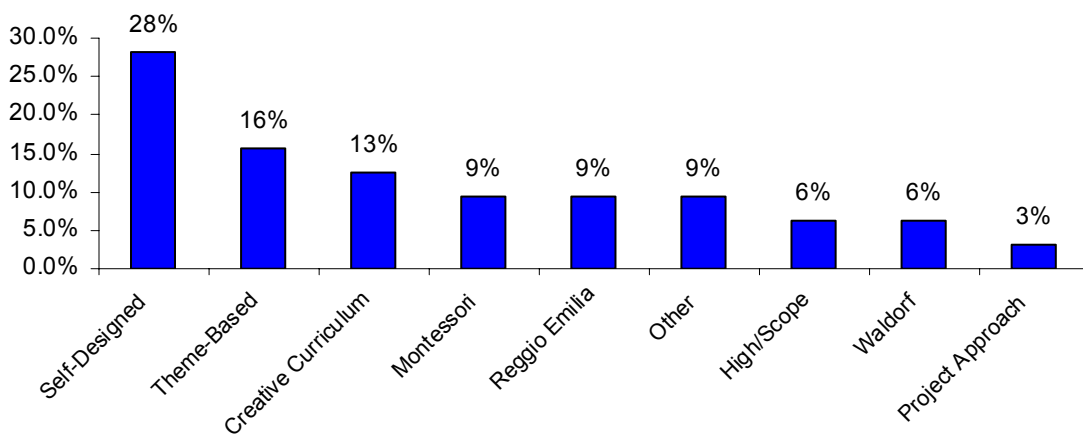
# PLAY-BASED, INTENTIONAL CURRICULUM

The Marin County Child Care Commission believes that high quality curriculum is play-based and intentionally planned to promote learning goals that include all developmental areas (cognitive, social emotional, language, physical) and that is specific to children’s individual development and emergent ideas and interests.

How many child care providers in Marin County use a defined curriculum approach and how does this approach guide their work with children?

The Quality Survey found that all respondents use a defined curriculum model/approach. As shown in Figure 8.1 there are a variety of approaches used, with “self-designed” curriculum being the most commonly cited. Sixty-eight percent of respondents to the Quality Survey reported that curriculum is very important in guiding their daily activities and results with children.

**FIGURE 8.1 — CURRICULUM APPROACHES USED BY LICENSED CARE PROVIDERS**



Source: Marin Child Care Commission Quality Survey, 2008

With this relatively small sample size, further investigation is warranted to gain a broader understanding of how frequently curricula are used, what the curricula consist of, especially those that are self-designed, and how implementation can be strengthened. Indeed, two-thirds of respondents to the Quality Survey said that they are “very interested” (49%) or “somewhat interested” (17%) in further developing the curriculum component of their programs.



## INDICATOR 9

# REGULAR CHILD ASSESSMENT

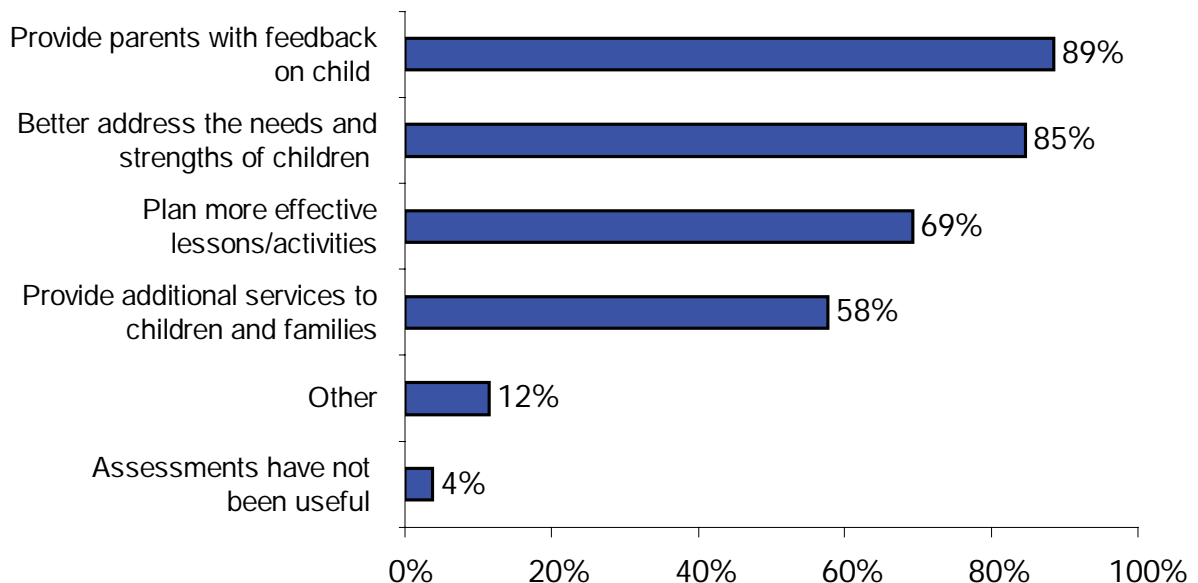
High quality programs conduct regular assessments of each child’s development that is observable during a child’s natural participation and make program adjustments based on assessment information.

How prevalent are regular child assessments in Marin child care programs and how is assessment information used?

Of respondents to the Provider Survey and the Quality Survey, the majority conduct regular assessments of children, 64% and 84% respectively. Nearly half (46%) of Quality Survey respondents reported that they conduct informal assessments (i.e., prepare a written summary based on experiences with a child over time), while 35% conduct formal assessments (i.e., observe and record observations on a standardized tool) and 19% conduct “other” kinds of assessments.

The majority of respondents (62%) to the Quality Survey said child assessments are “very important” in guiding daily activities with children and nearly all (96%) said that child assessment is useful for program improvement. As shown in Figure 9.1, the most commonly cited benefits of child assessment were to provide parents with feedback on their child and to better address the needs and strengths of children.

**FIGURE 9.1 — WAYS STAFF HAVE USED ASSESSMENT TO IMPROVE AND GUIDE PLANS AND ACTIVITIES**



Source: Marin Child Care Commission Quality Survey, 2008



Further investigation is warranted to gain a deeper understanding of how widely child assessments are used, what is entailed in the assessments, and how the implementation and use of assessments can be strengthened.



## INDICATOR 10

# PRACTICES SUPPORTING NUTRITION AND HEALTH

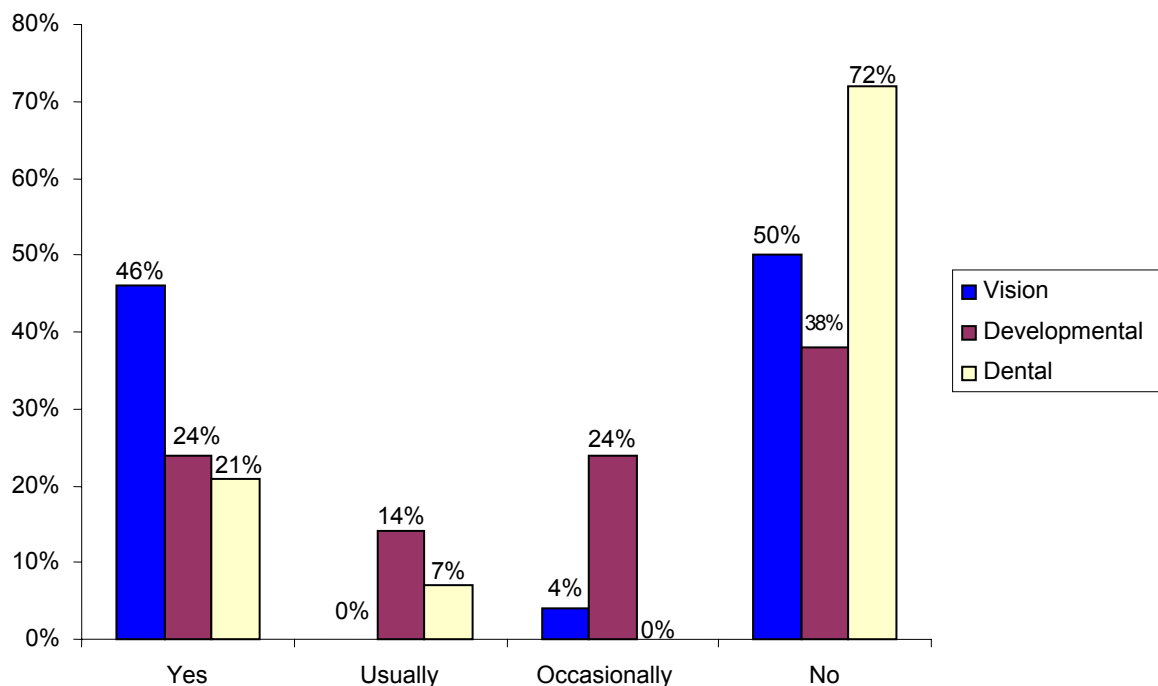
Educational practices that support the nutrition and health of children and staff are an important component of high quality programs.

How frequently are programs incorporating these educational practices to serve the children in their care? Are these practices only used when specific needs arise or are they a well-integrated part of program curricula and activities?

In considering the health and nutrition practices of child care programs in Marin County, it is helpful to examine the prevalence of health screenings, how well-integrated these activities are into the program, and whether staff have access to health consultation.

As shown in Figure 10.1, the majority of programs responding to the Quality Survey either do not offer screenings or only offer them occasionally. The most commonly offered regular screenings are vision (provided by 46% of programs), followed by developmental (24%) and dental (21%).

**FIGURE 10.1 — FREQUENCY OF REGULAR SCREENINGS FOR ALL CHILDREN IN PROGRAMS**

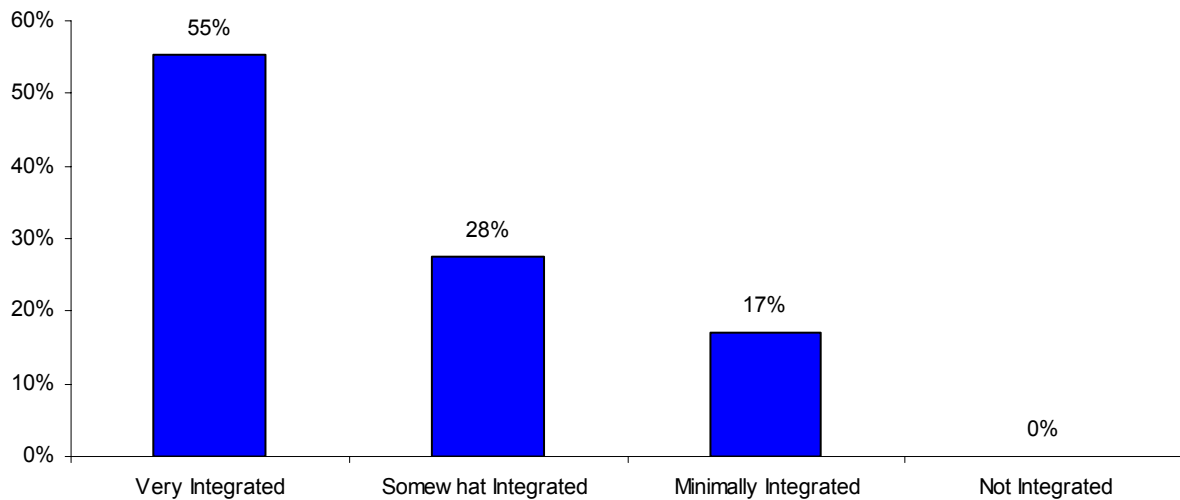


Source: Marin Child Care Commission Quality Survey, 2008



There are indications of some positive practices at work in Marin County; however, providers are interested in additional resources to improve their work. The majority of respondents to the Quality Survey felt that health and nutrition are “very” (55%) or “somewhat” (28%) integrated into the program’s curriculum and/or activities (Figure 10.2). However, 63% of respondents to the Quality Survey would be “very likely” (35%) or “somewhat likely” (28%) to use health consultation if it were provided at an affordable cost.

**FIGURE 10.2 — EXTENT TO WHICH HEALTH AND NUTRITION ISSUES ARE INTEGRATED IN TO CURRICULUM AND/OR ACTIVITIES**



Source: Marin Child Care Commission Quality Survey, 2008

While the needs assessment includes some self-reported information on nutrition and health practices to support children and families, it is important to gain a broader understanding of what educational practices are employed to support the nutrition and health of children, how they are being applied, and how programs are operating to support staff well-being.



## INDICATOR 11

# APPROPRIATE AND SUPPORTIVE TEACHING APPROACHES

Teaching approaches that are developmentally, culturally, and linguistically appropriate and that support the group and individual's needs and learning styles contribute to a high quality child care setting.<sup>31</sup>

How well are providers prepared to meet the diverse needs of the children in their care? For example, have they received adequate training and resources to work effectively with English Language Learners, dual language learners and children who have special needs? Do providers have access to adequate training and support to meet the mental health needs of the children they serve?

### **Serving children who are English or dual language learners**

In 2007, 17% of Marin children entering kindergarten were designated as English Language Learners.<sup>32</sup> However, only 17% of licensed providers have received non-credit training, and only 15% have completed college coursework in working with children who are dual language learners. Given the low numbers of teachers with relevant training, it is not surprising that only 36% of centers employ at least one teacher with relevant non-credit training, and only 18% employ at least one teacher with relevant college coursework.<sup>33</sup>

### **Serving children with disabilities and other special needs**

Obtaining high quality child care in Marin County can be especially problematic for families of children with special needs. Many of these children have speech and language delays, specific learning disabilities, and other special physical, environmental, behavioral, or learning needs. Figure 11.1 presents data regarding the number of children who have been formally identified by the Marin County Office of Education as having special needs, and who are receiving services accordingly.

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<sup>31</sup> An area for additional definition and investigation is whether teaching approaches are developmentally appropriate, which is not addressed in this report.

<sup>32</sup> California Department of Education, Dataquest, 2007.

<sup>33</sup> California Early Care and Education Workforce Study: Marin County Highlights, 2006.



**FIGURE 11.1 — SPECIAL EDUCATION ENROLLMENT BY AGE AND DISABILITY**

Disability	Infant Enrollment (0-2)	Preschool Enrollment (3-5)	School-Age Enrollment (6-13)	Total
Speech or Language Impediment	0	401	881	1,282
Specific Learning Disability	0	2	795	797
Emotional Disturbance	0	0	153	153
Other Health Impairment	0	5	110	115
Autism	0	25	87	112
Hearing Impairment	12	11	47	70
Orthopedic Impairment	11	24	33	68
Mental Retardation	0	9	32	41
Visual Impairment	4	7	25	36
Multiple Disability	0	2	5	7
Deafness	0	1	3	4
Traumatic Brain Injury	0	0	2	2
Deaf-Blindness	0	0	1	1
<b>Total</b>	<b>27</b>	<b>487</b>	<b>2,174</b>	<b>2,688</b>

Source: California Department of Education<sup>34</sup>

Although not all children with special needs require child care, these data provide a minimum estimate of the number of children with special needs who might need care; there are likely other children in the county whose special needs have not been formally identified or whose needs do not meet the legal requirements to be eligible for services.

Enrollment is only one piece of the puzzle in understanding the issues of providing care for children with disabilities and other special needs. Providers of special needs care face many of the same revenue and staffing challenges as providers of traditional care, further exacerbated by the heightened level of need among the children in their care. In gathering information from local stakeholders, several reasons emerge why respondents might not be able to fully meet these needs.<sup>35</sup>

- **Not enough providers willing to take children with special needs.** Available child care slots are often filled by children who are easier to serve. The shortage of providers who feel comfortable in meeting the needs of children with increased challenges often requires parents of these children to drive to another area of the county; for families without adequate transportation, this poses a significant problem.

<sup>34</sup> Data provided by the Marin SELPA (415) 499-5850; data is compiled effective December 1, 2006.

<sup>35</sup> 2002-2007 Marin Child Care Master Plan.



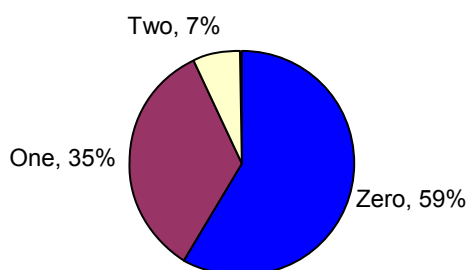
- **Inadequate staffing and staff development.** Providing appropriate and supportive care continues to be a challenge. Centers already serving at least one child with special needs employ a higher percentage of teachers with relevant training or coursework, in large part because California law has provided funding for such training since 2000. Seventy-four percent of centers employ at least one teacher with relevant non-credit training, and 59% employ at least one teacher with relevant college coursework.<sup>36</sup>

However, only 47% of licensed providers have received relevant non-credit training, and 20% have completed college coursework in working with children with special needs.<sup>37</sup> Two-thirds (67%) of respondents to the Quality Survey do not have resources and training available to serve children with disabilities and other special needs. Over half (55%) said they need resources and training to better serve children with disabilities and other special needs, with the top items requested being knowledge of and access to adaptive materials (63%) and on-site coaching and consultation (63%).

### Meeting mental health needs

Preliminary indications show a strong need and interest on the part of providers for additional training in early childhood mental health. Having strategies and practices to help guide children to positive and appropriate behavior is an important part of a provider's teaching approach. Unfortunately, nearly half (42%) of respondents to the Quality Survey reported asking one or two children to leave the program within the past year because of behavior issues.

**FIGURE 11.2 — NUMBER OF CHILDREN ASKED TO LEAVE PROGRAM BECAUSE OF BEHAVIOR ISSUES**



Source: Marin Child Care Commission Quality Survey, 2008

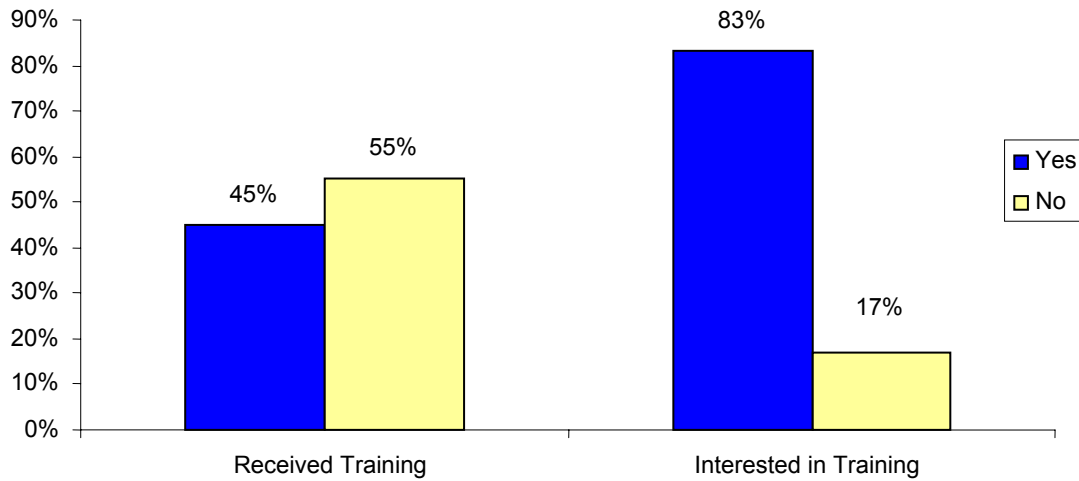
This highlights the significant gap in relevant mental health training and support. Less than half (45%) of respondents to the Quality Survey have received training in early childhood mental health, while 83% are interested in receiving more (Figure 11.3). Nearly three quarters (72%) of respondents to the Quality Survey would be likely to use mental health consultation if it were provided at an affordable cost.

<sup>36</sup> California Early Care and Education Workforce Study: Marin County Highlights, 2006.

<sup>37</sup> California Early Care and Education Workforce Study: Marin County Highlights, 2006.



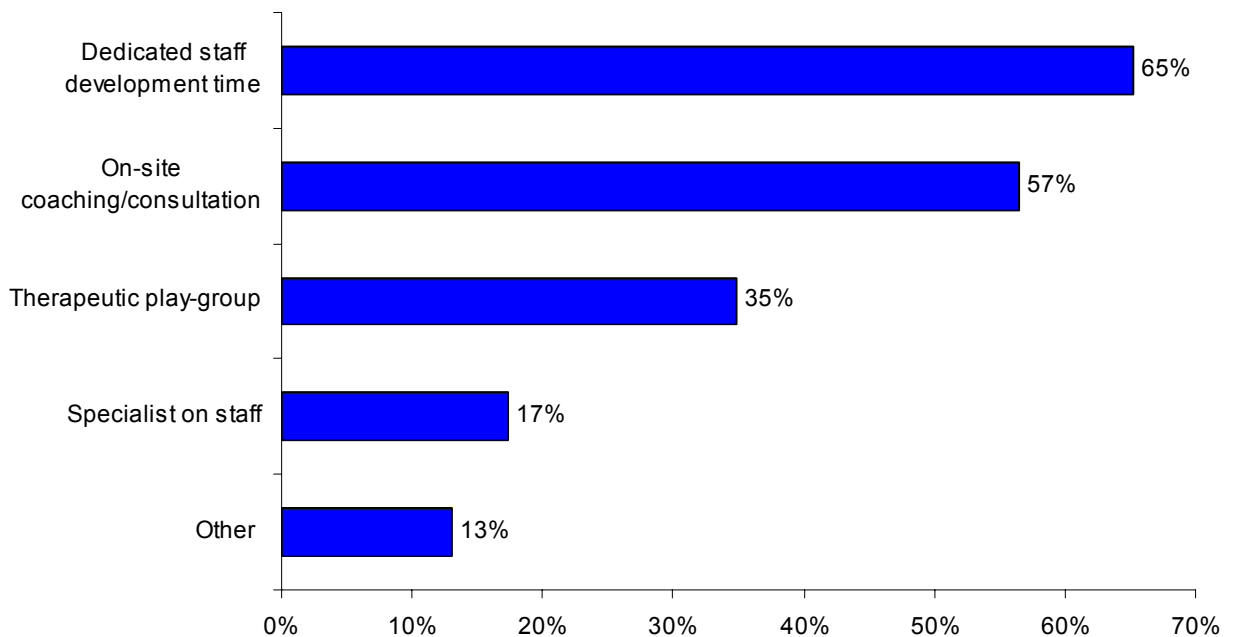
**FIGURE 11.3 — PROVIDER TRAINING IN EARLY CHILDHOOD MENTAL HEALTH, RECEIVED VS. INTERESTED IN RECEIVING**



Source: Marin Child Care Commission Quality Survey, 2008

When asked specifically what is needed to better understand and work with the mental health needs of children, the top answers were “dedicated staff development time” (65%) and “on-site coaching/consultation” (57%) (Figure 11.4).

**FIGURE 11.4 — RESOURCES AND TRAINING NEEDED TO BETTER UNDERSTAND AND WORK WITH MENTAL HEALTH NEEDS OF CHILDREN**



Source: Marin Child Care Commission Quality Survey, 2008



## INDICATOR 12

# WELL-EDUCATED, DIVERSE, TRAINED WORKFORCE

High quality programs depend on having a well-educated and trained workforce that reflects the language and the culture of the families served. In turn, this workforce needs to be supported with adequate compensation, supervision and professional development opportunities.

What evidence is there of a well-educated, diverse and trained workforce? When it comes to this indicator, what are the characteristics of Marin County's child care workforce?

While there are a variety of possible measures for assessing this indicator, the Master Plan Committee chose to focus on the following four categories: education level of program staff; extent to which programs are able to meet the language and cultural needs of children; staff turnover; and teacher salaries.

### **Education level of program staff**

Educational level is measured in two ways: higher education (AA, BA, and graduate degrees) and Child Development Division Permits from the California Commission on Teachers Credentialing (otherwise know as CDD permits). Understanding that more highly trained providers can improve the quality of child care programs, there is a focus and long-term goal to employ and retain staff who have completed significant formal training, such as a Bachelors degree (BA) and specific training in early childhood education.<sup>38</sup>

In Marin County, 48% of licensed center ECE teachers hold a BA degree or higher and 87% of centers employ at least one teacher with a BA degree or higher. As shown in Figure 12.1, the majority of staff with any degree have a degree related to Early Childhood Development, except in the case of center assistant teachers, where 68% have a degree unrelated to Early Childhood Development.<sup>39</sup>

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<sup>38</sup> A long term goal is to meet NAEYC and National Institute for Early Education Research (NIEER) recommendations that teachers have, at a minimum, a Bachelors degree and specific training in early childhood education.

<sup>39</sup> California Early Care and Education Workforce Study: Marin County Highlights, 2006.



**FIGURE 12.1 – PROVIDERS DEGREES, RELATION TO EARLY CHILDHOOD DEVELOPMENT**

	Degree related to Early Childhood Development	Degree unrelated to Early Childhood
<b>Center Providers</b>		
Directors with AA or higher	70%	30%
Teachers with AA	77%	23%
Teachers with BA or higher	57%	43%
Assistants with AA or higher	32%	68%
<b>Family Child Care Providers</b>		
Providers with AA or higher	67%	33%
Providers with AA degree	58%	42%
Providers with BA degree	73%	27%

Source: California Early Care and Education Workforce Study: Licensed Child Care Centers; Licensed Family Child Care Providers; Marin Highlights, 2006.

Child Development Division permits are required for teachers in licensed, state funded, center-based child care and development programs operated by the Child Development Division.<sup>40</sup> There are six levels of CDD permits, ranging from assistant to program director. To obtain a permit, applicants must complete a specified number of units of course work in Early Childhood Education/Child Development and fulfill various other requirements, depending on the permit level. Permits are valid for five years and can be renewed.

Figure 12.2 shows that, twice as many licensed center teachers with an AA degree or higher hold CDD permits, compared to licensed center assistant teachers with an AA degree or higher.

**FIGURE 12.2 — PERCENTAGE OF TEACHERS AND ASSISTANT TEACHERS WITH AA DEGREES HOLDING CDD PERMITS**

	% with CDD Permits
Licensed Center Teachers with AA degree or higher	50%
Licensed Center Assistant Teachers with AA degree or higher	25%

Source: California Early Care and Education Workforce Study: Licensed Child Care Centers Providers, 2006.

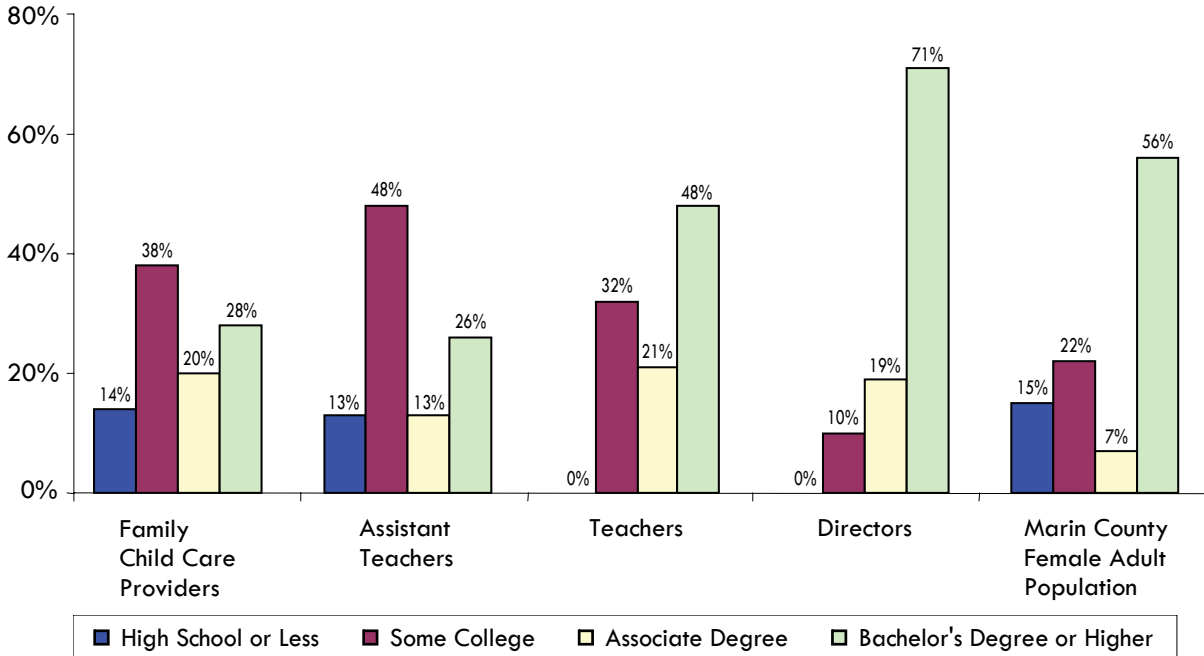
Possibly because of the different requirements for center and family child care homes, center staff have attained higher levels of education than family child care providers (Figure 12.3). Compared to Marin County’s overall adult female population, center teachers, assistant

<sup>40</sup> Federally funded and privately funded child development programs may or may not require CDD permits.



teachers, and family child care providers are less likely and center directors more likely to have completed a bachelor's or higher degree.

**FIGURE 12.3 — ESTIMATED EDUCATIONAL ATTAINMENT OF THE ECE WORKFORCE COMPARED TO MARIN COUNTY'S FEMALE ADULT POPULATION**



Source: California Early Care and Education Workforce Study: Marin County Highlights 2006.

**Meeting language and cultural needs**

Seventeen percent (17%) of children entering kindergarten in Marin County in 2007 were designated English Language Learners. Providers' ability to meet these children and families' language needs varies. Certain groups within the child care workforce are more likely than others to be able to communicate with children in a language other than English. Forty-six percent (46%) of family child care providers and 41% of assistant teachers are able to speak a language other than English versus 23% of teachers and 21% of directors.

As shown in Figure 12.4, even though the early childhood education providers are primarily White/Non-Hispanic, their ethnic distribution is more diverse and more closely reflects Marin's young children than do Marin's public school teachers. Center assistant teachers are the most likely to be women of color, followed by family child care providers and then teachers.<sup>41</sup>

<sup>41</sup> California Early Care and Education Workforce Study: Marin County Highlights, 2006.



**FIGURE 12.4 — ETHNICITY OF MARIN COUNTY CHILDREN BIRTH TO FIVE, ECE WORKFORCE, AND K-12 TEACHERS**

	Children 0-5 Years	Family Child Care Providers	Center Teachers	Assistant Teachers	Directors	K-12 Teachers
White	70%	66%	77%	57%	92%	92%
Latino/a	20%	23%	10%	30%	0%	4%
African American	2%	2%	2%	5%	2%	1%
Asian/Pacific Islander	4%	6%	7%	7%	4%	2%
Other	5%	3%	4%	1%	2%	1%
Total	100%	100%	100%	100%	100%	100%

Source: California Early Care and Education Workforce Study; Marin County Highlights, 2006.

Over two-thirds (69%) of respondents to the Quality Survey felt they are “fully able” to meet the language needs of the children they serve, while just over half (54%) felt they are able to meet the “cultural needs” of their children. Approximately two-thirds (64%) of respondents to the Quality Survey said they are interested in additional resources or training to meet the language and cultural needs of children in their care, with the most commonly requested resources cited being bilingual staff (32%) and greater family involvement (32%).

While portions of the child care workforce more closely reflect the diversity of children served, and language expertise does exist within the workforce, it is clear that there is a strong interest and need to continue to recruit, retain and support a diverse pool of providers.

**Staff Turnover**

In the Marin County child care community, there is considerable concern about teacher turnover and the effect it has on the quality of care. Data from the California Early Care and Education Workforce Study (2006) indicates that Marin’s child care teachers have an annual turnover rate of 22%, which is twice that of California public school K-12 teachers (11%).<sup>42</sup> The turnover rate is slightly higher than in 2001, when the rate was 20% for ECE teachers. Turnover among ECE assistant teachers is similar to the ECE teachers, at 18%. Director turnover, however, is less than one percent per year (Figure 12.5). It may be that because of low wages, fewer assistants and teachers view their jobs as part of a career path. In other cases, some assistant and teacher jobs are filled by seasonal or part-time workers, such as students.

**FIGURE 12.5 — ESTIMATED MEAN PERCENTAGE OF ANNUAL JOB TURNOVER AMONG ECE STAFF**

	Percent
Teachers	22%
Assistant Teachers	18%
Directors	1%

Source: California Early Care and Education Workforce Study; Licensed Child Care Centers, 2006.

A recent study of center-based providers found that 26% of ECE assistant teachers, 46% teachers, and 77% of directors have been at their current center for five or more years.<sup>43</sup> When it

<sup>42</sup> Alliance for Excellence Education, 2005.

<sup>43</sup> California Early Care and Education Workforce Study; Licensed Child Care Centers, 2006.



comes to family child care providers, the mean years of tenure is 12 years, with approximately one-quarter of providers (26%) having provided care for less than 3 years, and approximately one quarter (27%) having provided care for more than 18 years.<sup>44</sup>

### **Recruitment**

Recruitment – another piece of a stable, qualified workforce – is also of concern. Overall, there is a decline in people who are choosing early childhood care and education as their course of study. Statewide enrollment in ECE college courses has declined approximately 11% over the last five years. College of Marin Early Childhood Education course enrollment has also declined during that time, though not as significantly as the state average. The decline at College of Marin between fall 2002 and fall 2006 was about 5%.<sup>45</sup> There are also indications that among child care providers nearing retirement, a large portion represent the most well-trained members of the workforce.<sup>46</sup> When coupled with declining enrollment in ECE college courses, this presents a potential challenge in recruiting the numbers of teachers needed, let alone matching the training levels of the retirees. This constellation of circumstances underscores the need for ensuring strong recruitment and staff development strategies.

### **Teacher Salaries**

Previous data in this Plan have shown that Marin County has a high cost of living, and that market conditions in the county have driven up providers' facility costs. Given these conditions, many of Marin's child care teachers and assistants are not being paid a livable wage. The good news is that the rates of pay for the highest paid teachers have increased at a more rapid pace than the self-sufficiency rates in Marin County (34% vs. 24%). However, there is a long way to go until wages for even the most highly paid teaching staff meet the self-sufficiency rates. Figure 12.6 illustrates the average hourly rate for the highest paid center teachers, compared to the self-sufficiency wage for a single person in Marin County with no dependents; and for an adult with an infant and a preschooler.

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<sup>44</sup> California Early Care and Education Workforce Study, Licensed Family Child Care Providers, 2006

<sup>45</sup> College of Marin, 2007.

<sup>46</sup> California Early Care and Education Workforce Study: Marin County Highlights, 2006.



**FIGURE 12.6 — HIGHEST RATES OF PAY VS. SELF-SUFFICIENCY, 2000, 2006<sup>47</sup>**

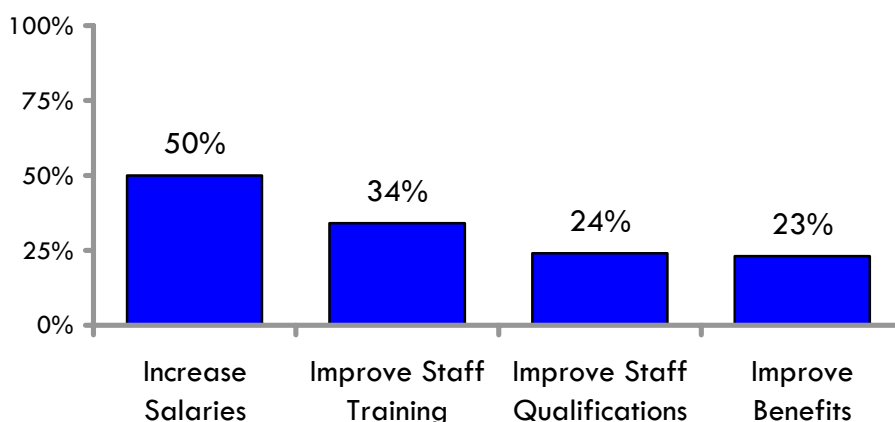
	Highest Paid Teachers Average Hourly Rate	Self-Sufficiency, Single Adult, no dependents	Self-Sufficiency, Adult with Infant and Preschooler
2000	\$14.91	\$11.18	\$29.69
2006	\$19.94	\$13.90	\$32.22
Percent Increase	34%	24%	9%

Source: California Early Care and Education Workforce Study, Marin County Highlights, 2006. Center for Child Care Workforce, A Profile of Marin County, Child Care Workforce, 2000.

Even though the salaries have been increasing at a steady rate for the highest paid teachers, data suggests that teachers with dependents need a second income to make ends meet in Marin County. The self-sufficiency wage for a single person in Marin County is \$13.90 hourly (\$28,912 annually). A single preschool teacher with an infant and preschooler would need to earn \$32.22 an hour to meet basic needs – over 50% more than the average teaching salary of the County’s highest paid teachers.

On the Provider Survey, center directors were asked what they would improve if their programs received additional funding. The number one response was to increase staff salaries. Responding directors also wanted to improve staff training, improve staff qualifications, and improve benefits, all steps that would likely enhance staff retention and quality (Figure 12.7).

**FIGURE 12.7 – WHAT DIRECTORS SAY THEY WOULD IMPROVE IF THEIR CENTERS HAD ADDITIONAL FUNDING, 2007**



Source: Marin Child Care Council Providers Survey, 2007

<sup>47</sup> The Family Economic Self-Sufficiency Standard (Self-Sufficiency Standard) measures how much income is needed for a family of a certain composition living in a particular county to adequately meet its minimal basic needs. It is based on the costs families face on a daily basis – housing, food, child care, out-of-pocket medical expenses, transportation, and other necessary spending – and provides a picture of what it takes for families to make ends meet.



### INDICATOR 13

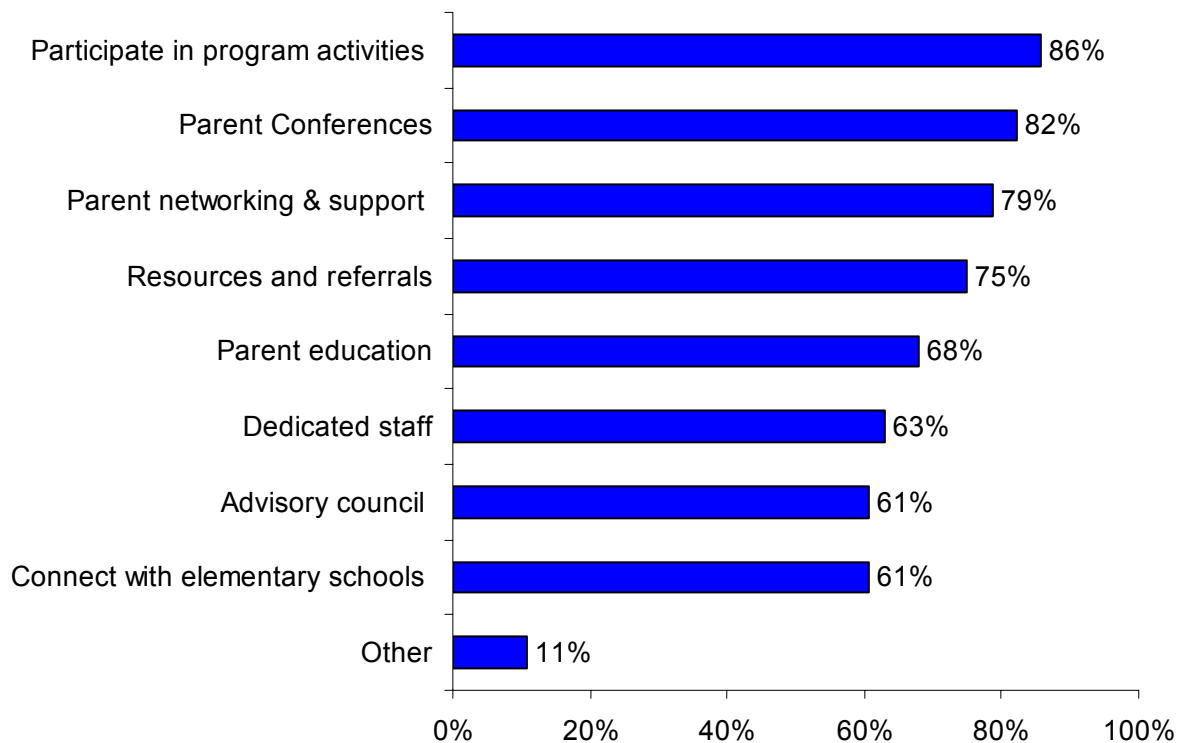
## COLLABORATIVE RELATIONSHIPS WITH FAMILIES

Establishing and maintaining collaborative relationships with families is an integral part of the overall quality of programs.

How do Marin County programs work with families? Do they offer parents opportunities to participate in programs? Are programs dedicating staff time to parent/family support and involvement? And, how satisfied are parents with program quality?

The Quality Survey asked center directors to name family involvement/support activities provided in their programs. Among this small sample, the most commonly reported activity is having family members participate in program activities (86%), followed by parent conferences (82%) and parent networking and support (79%). In addition, 63% of these programs reported having dedicated staff/staff time to parent/family support and involvement (Figure 13.1).

**FIGURE 13.1 — PARENT/FAMILY SUPPORT AND INVOLVEMENT ACTIVITIES PROVIDED IN PROGRAMS**



Source: Marin Child Care Commission Quality Survey, 2008

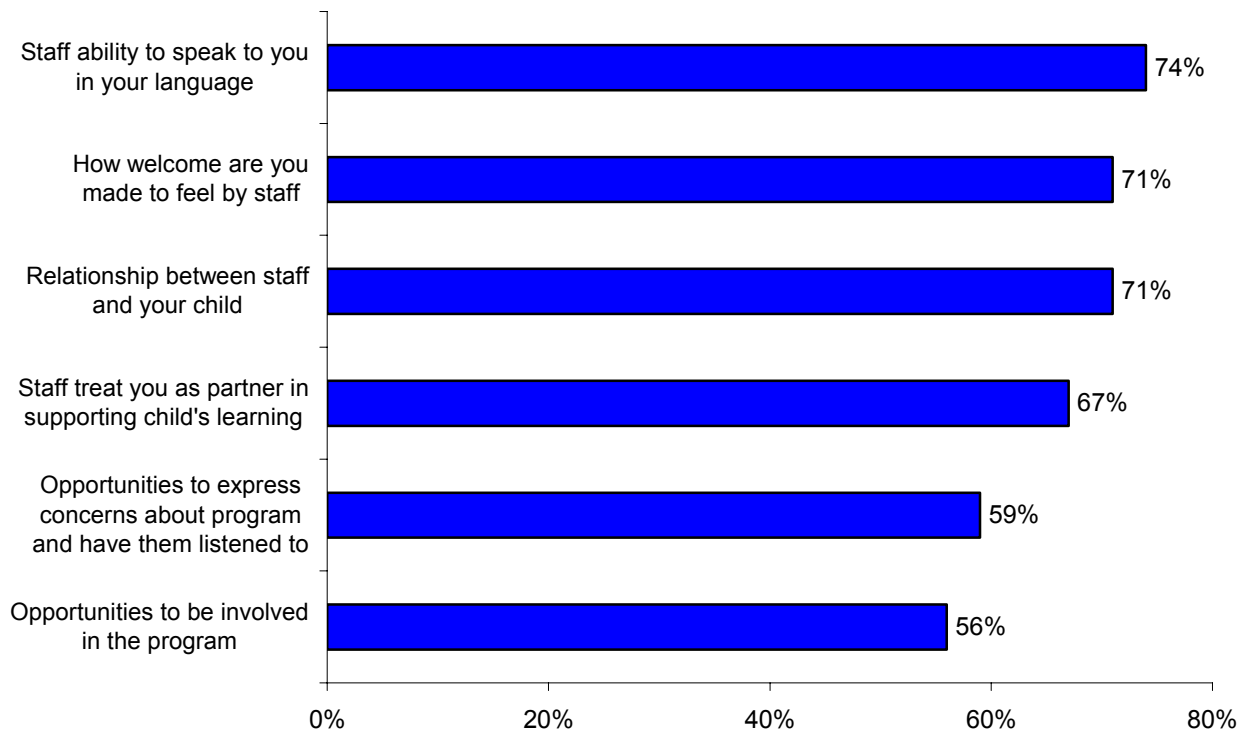


A multitude of factors affect what parents value in seeking child care and their satisfaction with that care, including how the provider interacts with their child, the safety of the environment, the richness of education materials, and other factors such as location and accessibility.

Given the characteristics that parents are looking for when selecting child care, how satisfied are parents with their child care arrangement? A 2007 survey conducted by Philliber Research Associates with 671 Marin families whose children received subsidized child care found that 94% were “satisfied” or “very satisfied” with the overall quality of the program. Parents who were more involved in their program reported a significantly higher level of satisfaction with the program than parents who were less involved.

Parents were asked to rate their satisfaction regarding several aspects of child care, including a subset of features characteristic of a quality child care setting. Responses are shown in Figure 13.2. The majority of respondents were “very satisfied” with all aspects.

**FIGURE 13.2 – PARENTS REPORTING THEY WERE “VERY SATISFIED” WITH VARIOUS ASPECTS OF CARE**



Source: Philliber Research Associates, Marin Child Care Outcomes Project Parent Survey Results, Aggregate Report, October 2007

When parents were asked to rate how happy their child was in the program, 85% reported that their child was “happy” or “very happy” in the program, and 94% of parents felt that the program



helps or will help their child succeed in school. Eighty-nine percent (89%) of parents felt that they were more confident as a result of being a part of their child care program. The survey also found that approximately 80% of parents felt their child care program made it easier for them to keep a job or attend an educational or training program.

## Quality of Child Care Summary

Overall, Marin County has a wide array of efforts to promote high quality child care experiences for children, families, and staff. While by no means an exhaustive analysis, this issue area of Quality provides a baseline for understanding and measuring certain components of quality. In addition to the components discussed in this report, there are other elements that are important and should be assessed in the future, such as:

- Establishing and maintaining relationships with, and using, the resources of the families' communities, such as health, social services, education and recreation to promote children's optimal development.
- Providing a safe, healthful and well-equipped physical environment.
- Implementing strong management policies and practices to ensure successful delivery of early childhood education services.

Developing a better understanding of and system for assessing quality of child care programs will likely be a focus for the child care field in Marin County for years to come.



## THE STATUS OF CHILD CARE IN MARIN – ISSUE AREA C

# COORDINATION OF THE CHILD CARE SYSTEM

Marin County has a range of child care options, services and resources available for families, as well as a number of initiatives to promote better access to and improve the quality of child care.

The Master Plan revision process led to the creation of a new issue area that was not explicitly included in the 2002-2007 Master Plan: Coordination of the Child Care System. The parameters and indicators for this issue area emerged from examination of the needs assessment data, Master Plan Committee meetings, interviews, community forums, and the planning retreat. As neither this issue area nor specific indicators were identified in the 2002-2007 Plan, the needs assessment did not include data collection to measure the current status of coordination in the county. However, the following data points do establish a baseline for much of the work to be undertaken as part of the 2008-2013 Master Plan. Furthermore, the final section of this Master Plan includes more specific indicators that will be used to measure progress towards the 2008-2013 goals and objectives in two areas of coordination: infrastructure for the child care system and policy and advocacy efforts.

The Indicators	How We're Doing
<p><b>14. Evidence of development of infrastructure for the child care system.</b></p>	<p><b>Countywide infrastructure for childcare</b> — There are a number of initiatives in Marin County that exist to coordinate collaborative efforts, although these initiatives are not as well integrated as they could be and lack a central access point for child care providers to access information and resources.</p> <p><b>Connection between child care and other children's service providers</b> — Though various efforts exist, especially around connections with elementary schools, these efforts are only for specific geographic areas and populations. Successful projects or strategies should be further developed to build consistent, strong connections between child care programs and other children's services across the entire county.</p>
<p><b>15. Evidence of effective policy and advocacy efforts to support the child care system</b></p>	<p><b>Coordinated policy and advocacy efforts for family and children</b> — There are several policies and advocacy efforts aimed at strengthening the child care system, however, this effort needs to be coordinated and integrated into all county systems.</p> <p><b>State activities that may impact local coordination and integration</b> — In addition to local efforts, a number of activities at the state-level offer promising avenues for better coordination and integration of Marin's child care system.</p>

During Master Plan Committee meetings, public meetings, and conversations with key stakeholders, a vision of a coordinated child care system began to emerge. This vision includes greater coordination both *within* the child care system and *between* the child care system and other resources and systems in Marin. The vision also incorporates the coordination of advocacy and policy efforts to establish child care as a vital component of the health and prosperity of the county.



## INDICATOR 14

# THE CHILD CARE INFRASTRUCTURE

A comprehensive, high quality child care system requires having a county-wide infrastructure that both coordinates child care services and supports and promotes integration of child care programs with other children's services. How well has Marin succeeded in building this type of a child care system?

Currently, efforts do exist to both build infrastructure within the child care system itself and foster connections between child care programs and other children's services, including articulation between preschool and kindergarten. A detailed listing of current initiatives can be found in the final section of this plan – Section 3 – under the section titled *Coordination of the Child Care System*.

Progress, however, has been choppy; and while many pieces are in place, significant work remains in establishing the local institutional capacity needed to develop, administer, and manage a comprehensive and coordinated system.

### ***Infrastructure for Child Care System***

Even though “building infrastructure” was not an explicit goal in the 2002-2007 Master Plan, the community has recognized the need for better coordination within the child care system. Several recent local efforts are underway to strengthen system cohesiveness that we can look at to establish a baseline assessment of the child care infrastructure in Marin. They include:

#### **Integration Across Programs and Providers**

The Marin County Child Care Commission, in partnership with several community agencies, applied for and received the Early Learning Opportunities Act (ELOA) grant through the Administration for Children, Youth and Their Families in late 2003. This 15-month grant supported First 5 Marin's School Readiness Summer Bridge programs (administered initially by Marin Head Start), Early Childhood Mental Health Consultation, Raising a Reader Family Literacy, and Child Care Health Linkages projects. Agencies participating in this grant had the opportunity to work together to link their services and integrate them into a more comprehensive program. Together, they achieved the expected results and benefits for the grant, including strong collaboration and involvement of the key partners throughout the planning and implementation of programs.

Following the completion of the ELOA grant, several agencies involved in quality improvement projects continued working to coordinate their services. These agencies meet as an ad-hoc committee of the Child Care Commission called the Quality Improvement group. Their purpose is to share information about services and explore



how they can better organize their services in order to work with child care programs more effectively.

### **Planning for a Center for Early Childhood Excellence in Marin**

In February 2002, a group of early care and education professionals began to meet to explore the issue of quality and what might be needed in Marin to systemically improve the quality of care. This group proposed the establishment of a Center for Excellence in Early Childhood. The purpose of the Center was to “realize excellent early care and education for all children birth through 8 years of age”. While the center was not established due to lack of funding, the group agreed that the current structure and service delivery system need to be better coordinated and integrated.

### **Early Childhood Education Partnership**

In 2005, the Marin County Superintendent of Schools convened four organizations that have been heavily involved in early care and education issues: First 5 Marin, Marin Child Care Council, Marin County Child Care Commission, and the Marin County Office of Education (MCOE) itself. While the initial focus of this group was to track and discuss the development of the state ballot initiative Proposition 82 – Preschool for All, the group has continued meeting regularly to share information about early education issues and local activities. The group has collaborated on several different projects including a Community Forum on Preschool for All and the renewal of the MCOE’s Regional Occupation Program (ROP) for early childhood educators. This group meets monthly and provides a regular opportunity for coordination and services development across these agencies.

These local initiatives, among others, demonstrate the community’s strong passion and commitment to quality early care and education. However, it became clear during this planning process that improving access and quality would not be possible without intentional coordination of individual efforts. Although there has been a series of conscientious efforts to coordinate many aspects of the child care community, significant work remains to develop the infrastructure necessary for an integrated, high quality child care system.

## ***Connection between Child Care Programs and Other Children’s Services***

Various efforts exist in Marin to connect child care programs with other children’s services, including public education and health and human services; however there is significant room for improvement and expansion in this area. During the needs assessment, one of the most commonly cited areas for needing improvement was the linkage between preschool and kindergarten. Linkages include activities such as supporting children and families as they transition from one system to the next, ensuring preschool and elementary curricula are aligned, and developing a system for sharing information between the two systems. For example, when



asked about transition activities, sixty-two percent (62%) of respondents to the Provider Survey reported that they have a process in place to help children. Most commonly cited efforts include having children visit a kindergarten class, having a kindergarten teacher visit a preschool, and having a kindergarten orientation for parents.

Though various efforts exist, these efforts are only for specific geographic areas and populations. For example, School Readiness and School Linked Services Initiatives in five Marin communities promote comprehensive Kindergarten transition activities such as Summer Bridge, Kinder Academy, and informal conversations among Pre-K and Kindergarten teachers.

Successful projects or strategies should be further developed to build consistent, strong connections between child care programs and other children's services across the entire county.



## INDICATOR 15

# POLICY AND ADVOCACY EFFORTS

Accessible, high quality child care is critical to the overall health and well-being of any community. A coordinated child care system contributes to healthy child development, family support, and the economic and community development of the county.

Is the child care system sufficiently well-connected with other sectors and systems in Marin, as well as advocacy and policy efforts, to ensure high quality and sustainable services for children and families?

### ***Coordinated Policy and Advocacy Efforts for Families and Children***

There are currently efforts underway at the local, state and federal levels to improve child care accessibility and quality. The work of these initiatives and organizations range from developing a community vision for children built upon the importance of early care and education, to a year-long effort to build support for a national policy platform for families and children.

However, discussions at meetings, through outreach to stakeholders, and at the planning retreat surfaced the clear need for a coordinated policy effort to establish child care as a cornerstone of child, family and community development in the county. Many organizations advocate actively for individual issues. Harnessing these efforts into a collective child care policy platform will result in a stronger and more powerful advocacy effort.

### ***State Activities that May Impact Local Coordination and Integration***

While state-level activities are not entirely within our control, there are number of activities at the state-level that offer promising avenues for improving the coordination, quality, and access of Marin's child care system, and therefore warrant mention in our county Master Plan.

#### **State Preschool for All Initiative**

Significant activity took place during 2005-06 to establish publicly funded preschool. In 2005, Jack O'Connell, Superintendent of Public Instruction called for Preschool for All: A First-Class Learning Initiative in his State of Education Address and proposed "state and local policy actions to guide preschools in their work preparing three and four year olds for kindergarten through second grade." Specific components of the Initiative included:

- Developing high-quality pre-K content standards
- Building a first-class professional learning system for preschool teachers
- Implementing a results-based accountability system
- Creating seamless transitions from pre-K to kindergarten and first grade
- Involving all stakeholders in the learning process



During the same time period, State Proposition 82: Preschool for All, was developed and placed on the June 2006 ballot. Although the initiative did not pass in 2006, it raised awareness across the state and built momentum that is still in place.

### **California Department of Education P-16 Report**

During 2007 the state's P-16 Council prepared an important report highlighting the need for early education. The P-16 Council is a statewide assembly of education, business, and community leaders charged with developing strategies to better coordinate, integrate, and improve education for preschool through college students. In their report, the P-16 Council presents a framework for closing California's academic achievement gap. They present four underlying causes and proposed solutions, including **access** to basic, quality education. The first recommendation under the Access theme is to provide high quality pre-kindergarten for all students. The report offers a "roadmap" for achieving quality which includes a) high quality benchmarks based on the work of the National Institute for Early Education Research, b) new pre-k facilities, c) articulation of pre-K programs with kindergarten, d) workforce recruitment and preparation, e) quality improvement systems and tiered reimbursement, f) results-based accountability systems and g) full-day, full-year services.

In his 2008 annual address, the Superintendent formally accepted the P-16 Council report and pointed to specific steps he has taken to move the effort forward. He called for the consolidation of existing state-funded programs in order to streamline current services. He proposed the creation of a quality-improvement system that ties higher levels of funding to higher levels of quality. He also announced the completion of the Preschool Learning Foundations which will soon be followed by the development of frameworks to guide early childhood teachers in their work with children. In Marin, the child care field can leverage and build upon this important work happening at the state-level.

### **State Legislative Proposals Pending for 2008**

SB 1629 and AB 2759 are two recent policy proposals for improving the quality of California's early care and education system. SB 1629, introduced by Senator Steinberg, will establish a Commission to create an Early Learning Quality Improvement System and develop a framework for improving the quality of preschool programs. This includes a quality rating scale to help parents make informed decisions about programs for their children and a graduated funding model to help existing and future preschool programs reach and maintain higher levels of quality. SB 1629 is joined to AB 2759 which consolidates and streamlines existing Title V programs for three and four year olds. These bills will support and further not only the coordination goals in the Plan, but the access and quality goals as well.

## **Coordination of the Child Care System Summary**

Since the creation of the 2002-2007 Master Plan, the child care community has made much progress in the area of coordination. This is true both of efforts to coordinate programs and



providers within the child care field as well as strengthening connections between the child care sector and other children's service providers. And yet, there is much still to do, including building a strong county infrastructure, expanding on effective integration strategies and developing new ones, and building a cohesive child care policy platform will inform countywide policies and services, and provide a powerful advocacy base.

A collaborative and inclusive process should be at the heart of efforts to further develop the vision and next steps for coordination of the child care system in Marin.



**PART 3: RECOMMENDATIONS**

# **TOP ISSUES AND RECOMMENDATIONS**



# THE VISION FOR CHILD CARE IN MARIN COUNTY

In 1995, the Marin County Child Care Commission identified the following components of an ideal child care system for children, families and child care providers:

<b>Meets the Needs of Marin County's Families Because It...</b>	<b>Meets the Needs of the County's Children Because It Promotes Programs That...</b>	<b>Meets the Needs of The County's Service Providers By...</b>
<ul style="list-style-type: none"> <li>• Is accessible</li> <li>• Is affordable (fees based on ability to pay)</li> <li>• Accommodates children from birth through age 14 with full continuous care</li> <li>• Serves children and families in special circumstances</li> <li>• Provides readily accessible parent support services such as parent education, information and referral to community resources</li> <li>• Allows for choice among a range of options</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage self-exploration</li> <li>• Nurture self-acceptance</li> <li>• Provide environments that are healthy and safe</li> <li>• Identify needs for early preventive or remedial intervention</li> <li>• Encourage development of the whole child</li> <li>• Are developmentally appropriate</li> <li>• Are culturally sensitive and appropriate</li> <li>• Prepare the child to cope with and succeed in school</li> <li>• Accommodate the schedule and balance the routine of the school-age child</li> </ul>	<ul style="list-style-type: none"> <li>• Covering the full and actual cost of providing high quality child care, including adequate staff compensation, as well as appropriate physical facilities and supplies</li> <li>• Promoting collaboration and cooperation among child care providers and between child care providers and providers of other types of ancillary community social services</li> <li>• Providing resources; opportunities for professional support, development, and recognition; and training for new providers</li> <li>• Offering technical support in areas such as general management and personnel issues</li> </ul>

Source: Marin County Child Care Master Plan, 1995-2000.

This vision set the stage for the Marin Child Care Commission to go one step further by refining the Components of Quality Early Care and Education (Appendix 6). This expanded vision of quality child care helped steer the data collection, analysis, and planning efforts necessary to develop the 2008-13 Master Plan goals, objectives, and recommendations for enhancing Marin County's child care system.



## SUMMARY OF ISSUES AND RECOMMENDATIONS

With the current economic conditions of the Bay Area, Marin County families and child care providers are challenged to make ends meet. Providers balance escalating real estate costs and teacher salaries with what parents can be charged. Parents balance their preferences around child care with what they can afford. The Marin Child Care Commission, in partnership with the child care field, is responsible for helping families and providers find that balance.

The Master Plan Committee identified key indicators that reflect the health of the system within three main issue areas: **Access to Child Care, Quality of Child Care, and Coordination of the Child Care System**. In updating the Master Plan, the Committee reviewed the indicators and progress made towards the original goals and objectives. Based on that analysis and considerable community input, the Committee identified the following issues facing Marin's child care system:

1. ***Inadequate licensed supply:*** There are more children in need of quality child care than there are licensed child care slots to accommodate them. For the estimated 11,642 children needing licensed care, there are only 9,986 licensed slots.
2. ***Inadequate service for children with special needs:*** Child care capacity for children with special needs is also in short supply. Providers are at times reluctant to take such children because of the extra level of care and training involved, which often must be provided with no extra reimbursement.
3. ***Inability to cover the cost of care:*** The high costs of doing business and living in Marin County makes child care unaffordable for providers and parents alike. At a cost of about \$600 to \$1,200 per child, parent fees for licensed child care already exceed what is charged in neighboring Bay Area counties, yet those fees are still not enough to pay the providers' basic operating costs. In addition, there is a shortage of subsidized child care slots, with approximately 2,094 children eligible for, but not receiving subsidized care.
4. ***Insufficient staff salaries, development, and stability:*** Even with parent fees as high as they are, these fees do not provide enough revenue for teachers to earn a living wage. Cost and other factors lead to a significant portion of staff not having adequate training and support to meet the diverse needs of the children they serve. The child care teacher turnover rate is 22%, which is twice that of elementary school teachers.
5. ***Underdeveloped quality program practices:*** There are a number of high quality programs in Marin County, and various supports and resources to improve quality. However, program components such as curriculum, teaching approaches, assessment, health and nutrition, family involvement, and cultural competence show room for improvement. Importantly, providers show a strong interest in further developing their practices in these



areas. The majority of survey respondents (55-76%) responded that they are interested in further developing these aspects of their programs.

- 6. *Insufficient coordination of the system:*** Marin County has a number of initiatives and programs that exist to coordinate certain components of the child care system. However, there is a need for better integration of and investment in these efforts. The need for coordination to support child care extends beyond those agencies and individuals involved in the local child care system to include other child and family support systems, businesses and local leaders, and state and local policy and advocacy efforts.

Various stakeholders in Marin County affirmed the Master Plan workgroup's findings about the top issues for child care. When asked what key things the Marin community should focus on in improving child care, those contacted offered the following themes in their suggestions:

- Increase access
- Provide more affordable care and more subsidies
- Have highly qualified staff and systematize staff training opportunities
- Provide quality care, school readiness, and enrichment activities
- Coordinate child care system efforts to better support and strengthen programs

The Commission recognizes that some of the issues identified in this Master Plan could be addressed through the implementation of a statewide, publicly-funded early childhood education system. It is the Commission's intent that the strategies identified here will provide program improvements and support as the state continues to develop and implement state-wide reforms. The Commission plans to support and advocate for these state-wide reforms and to ensure that they mesh in an integrated way with existing local services.

To respond to the child care needs identified through the Master Plan needs assessment process, the next several pages outline recommendations for Marin County's child care community. They are grouped into three Issue Areas, same as the needs assessment portion of the plan: **Access to Child Care, Quality of Child Care, and Coordination of the Child Care System**. Each issue area includes updated goals and objectives for building a more comprehensive, high quality child care system, and related indicators. For each goal, we list relevant initiatives that are currently underway, as well as new strategies to achieve the goals and objectives.



**ISSUE AREA A:  
ACCESS TO CHILD CARE**

# THE GOAL

**1. All families in Marin have access to child care that meets their individual needs and preferences.**

Objective Area:

**Availability — Increase the supply of child care options that meet the needs and preferences of parents.**

The Objectives

- A. Increase supply of licensed infant child care options.
- B. Increase supply of full-time licensed preschool options.
- C. Increase supply of school-age child care options for K-5.
- D. Increase supply of middle school child care options.
- E. Increase supply of licensed child care options for children with disabilities and other special needs.
- F. Increase supply of child care options available during non-traditional hours.

Some Recent Initiatives:

- Marin Child Care Council; Child Care Initiative Project (CCiP), brought about an increase of family child care homes and primarily infant/toddler slots.
- A partnership between Homeward Bound of Marin, Marin Head Start, and the Marin County School Linked Services provided Family Village, a Head Start program for infant/toddler homeless children at the Homeward Bound Emergency Shelter.
- San Rafael City Schools received State preschool funds to open Pre-K classrooms at Bahia Vista and San Pedro Elementary schools.

### THE ISSUE

***Inadequate licensed supply:***

There are more children in need of quality child care than there are licensed child care slots to accommodate them. Of the three age groups, school-age children and infants face significant shortages; licensed providers can only serve about 49% and 86% of them, respectively.

### THE KEY INDICATORS TO WATCH

- Number of infants needing care vs. number of slots
- Number of preschool children needing care vs. number of slots
- Number of school-age children needing care vs. number of slots
- Level of parent satisfaction with their child care arrangements
- Ability of child care providers to serve children with disabilities and other special needs



- After School Education and Safety (ASES) and 21st Century grant funding have created new slots at public elementary and middle schools providing over 800 school-age children free after school care in Novato, San Rafael, Sausalito, Marin City, Inverness, and Bodega Bay.

**Potential Strategies:**

- Develop targeted campaign to incentivize new family child care infant homes and/or network for family child care homes that are “enhanced” for special needs care.
- Expand capacity to serve all children in inclusive settings.
- Develop enhanced therapeutic preschool classrooms.
- Partner with local elementary and middle schools, as well as parks and recreation departments to develop programs targeted to both elementary and middle school children.
- Reduce or eliminate local regulatory barriers to child care development.



**Objective Area:**

**Affordability: Maintain or reduce the percentage of family income needed to pay for child care costs.**

**The Objectives**

- A. Increase the amount of subsidized child care in the county for all age groups.
- B. Increase the amount of public investment in child care.
- C. Increase the amount of private investment in child care.

**Some Recent Initiatives**

- Marin Child Care Council maintains a centralized eligibility list to enable parents a single entry point for subsidized child care.
- Child care funding from the California Department of Education (Child Development Division), Head Start, and CalWORKS provides child care subsidies to over 1,800 children of low-income families in Marin.
- First 5 Marin funds one subsidized preschool class in San Rafael.
- Marin County General Plan now includes language, which is needed to institute a county “in lieu” fee, to increase local funding for child care space preservation and expansion.

**Potential Strategies:**

- Join San Mateo/San Francisco pilot project that allows state subsidized contractors the regulatory flexibility to retain full child care contract allocations.
- Advocate for completion of the “Nexus Study” that would allow establishment of “in-lieu” fees through Marin County’s general plan process.
- Create a scholarship program with local businesses and organizations to sponsor children to attend after school programs, targeting ages 10-13.
- Advocate at the state level to expand efforts to increase the reimbursement rate and establish universal preschool.

**THE ISSUE**

*Inability to cover the cost of care:* The high costs of doing business and living in Marin County makes child care unaffordable for providers and parents alike. At a monthly price of about \$600 to \$1,200 per child, parent fees for licensed child care already exceed what is charged in neighboring Bay Area counties, yet those fees are still not enough to pay the providers’ basic operating costs.

**THE KEY INDICATORS TO WATCH**

- The cost of child care as a percentage of family income
- Number of children eligible for subsidized care that are not being served
- The number of families on the Centralized Eligibility List (CEL)
- Length of time for families on the CEL prior to receiving needed child care placement
- Amount of public and private money invested in child care



**ISSUE AREA B:  
QUALITY OF CHILD CARE**

# THE GOAL

**2. All child care arrangements (licensed and license exempt) provide children with high quality experiences that support the development of the whole child.**

**Objective Area**

**Child Care Workforce — Increase recruitment, support and retention of a high quality workforce (including licensed and license exempt providers of child care).**

**Objectives:**

- A. Build the child care workforce through intentional outreach and recruiting.
- B. Retain highly skilled and experienced members of the child care workforce.
- C. Increase education and skill levels of the child care workforce.
- D. Increase cultural and linguistic competence of the child care workforce.
- E. Increase the compensation levels of the child care workforce to be commensurate with similar professions, reflective of our local economy, and linked to training and development.

**Some Recent Initiatives**

- The College of Marin has taken leadership to provide alternative training opportunities including on-site evening and weekend classes; and established the Marin Child Care Director’s Network.
- Marin Child Care Council provides family child care provider training, a license exempt provider training project, increased support and technical assistance to unlicensed child care/license exempt providers, and special needs training. In addition, the organization coordinates a family child care mentor project with an emphasis on health and safety in the child care home, as well as the annual Striving for Excellence conference.

**THE ISSUE**

*Insufficient staff salaries, development and stability:* Even with parent fees as high as they are, these fees do not provide enough revenue for many teachers to earn a living wage. Cost and other factors lead to a significant portion of staff not having adequate training and support to meet the diverse needs of the children they serve. The teacher turnover rate is over 20%.

**THE KEY INDICATORS TO WATCH**

- Education level of the Marin County child care workforce
- Stability of the Marin County child care workforce
- Compensation level of the Marin County child care workforce
- Availability of outside support and professional development opportunities for child care programs to develop effective experiences for special child populations



- MarinCARES promotes staff training and retention by providing financial incentives to teachers and has worked to expand and improve career counseling services with College of Marin. In addition, with the support college of Marin, MarinCARES is coaching and mentoring a cohort of early childhood education students through Supportive Learning Communities program.
- Marin County Office of Education administers the Regional Occupation Program (ROP), for high school students interested in early childhood education and a leadership program for preschool administrators
- Through a partnership with Marin high schools, students can earn ECE Credits while in high school, an AA degree at the College of Marin, and a BA degree at San Francisco State University.

#### **Potential Strategies:**

- Support efforts to increase access to higher education and achievement degrees and early childhood certifications.
- Sustain staff training and retention programs like MarinCARES.
- Provide training, including onsite follow-up to staff to develop cultural and linguistic competencies.
- Develop current and future leadership, both administrators and master teachers, through training, networks, and collaborative opportunities.
- Create a pool of substitute teachers by establishing a collaborative that provides funding, benefits, and bonuses for being a substitute teacher.
- Establish a county-wide child care specialist consultant pool to facilitate program quality and staff development and training.
- Recruit new workforce by intentional outreach in non-traditional places, e.g., high schools, retirees, college and employment counselors, co-ops, and mothers' clubs.



## Objective Area

### **Child Care Program Practices — Support child care programs, centers and homes to implement quality practices.**

#### Objectives:

- A. Establish a sustained program quality enhancement project.
- B. Strengthen on-site coordination of and access to health and mental health services.
- C. Develop or strengthen programs' curricula and "intentional" teaching practices.<sup>48</sup>
- D. Increase the amount of family support and involvement opportunities.
- E. Increase programs' ability to provide a safe, well-equipped physical environment.

#### Some Recent Initiatives

- Components of quality care have been identified, and the Child Care Commission adopted a quality statement as the working definition of quality in early care and education.
- Special Needs Early Childhood Mental Health Initiative works with child care providers to identify and link children with special needs to appropriate services. Services include on-site coaching and consultation and a pilot therapeutic play group.
- Marin First 5 Small Grant Program provides funding for program improvement or enhancement activities.
- First 5 sponsored School Readiness and Health Initiatives in five Marin communities engage parents to increase opportunities and knowledge around aspects of school readiness, health, and nutrition.
- Early Learning Program Enhancement Project (PEP), a one year pilot program focused on program quality assessment and professional development in areas identified for improvement.
- The Parent Services Project provides coaching for staff and parents to address how parents can be meaningfully engaged and take leadership roles on behalf of their children.

#### **THE ISSUE**

**Underdeveloped quality program practices:** While there are a number of high quality programs in Marin County, and various supports and resources to improve quality, program components including curriculum, teaching approaches, assessment, health and nutrition, family involvement, language and cultural needs show room for improvement. Importantly, providers show a strong interest in further developing these areas of their programs, with the majority of survey respondents (55-76%) responding that they are "interested in further developing these aspects of their programs."

#### **THE KEY INDICATORS TO WATCH**

- Prevalence of quality practices as defined by Components of Quality
  - Countywide scores on program quality tools
  - Number of child care centers that access support services in health, mental health and instructional services
- Level of parent satisfaction with the quality of child care
- Number of families receiving information and education regarding health and safety

<sup>48</sup> The term "Intentional" refers to teaching practices which have intentional learning goals.



### Potential Strategies

- Broaden and deepen the reach of the Special Needs Early Childhood Mental Health Initiative, including supporting on-site coordination.
- Expand the number and role of child care health advocates to provide regular on-site program support for integration of practices and services.
- Marin Child Care Commission adopts and distributes an agreed upon program quality assessment tool and encourages child care programs to establish a regular assessment cycle.
- Develop a funding source to assist with identified needs in facility improvement, staff training, and curriculum development.
- Develop and deepen existing parent leadership and family engagement initiatives, and develop a process for parents to regularly assess program quality.
- Develop a model training and curriculum implementation project integrating the Preschool Learning Foundation, and authentic assessment based on the key components to quality early care and education (Appendix 6).



**ISSUE AREA C:  
COORDINATION OF THE EARLY CARE AND  
EDUCATION SYSTEM**

# THE GOAL

## **3. Accessible, high quality child care is a coordinated component of Marin’s infrastructure to support families and to sustain community development.**

**Objective Area:**

**Infrastructure — Develop a county-wide infrastructure for child care and early learning that promotes coordination and integration across the field and with schools, agencies, and service providers that support children and families.**

**The Objectives:**

- A. Develop a countywide infrastructure to coordinate collaborative efforts and provide programs with a central access point for information and resources.
- B. Strengthen linkages among early childhood and other children’s service providers.
- C. Strengthen articulation between the early childhood and school systems.

**Some Recent Initiatives**

- School Readiness and School Linked Services Initiatives in five Marin communities promote comprehensive Kindergarten transition activities such as Summer Bridge, Kinder Academy, and informal conversations among Pre-K and Kindergarten teachers.
- The Child Care Commission developed the Kindergarten Snapshot, a tool to help parents and teachers to share pertinent information about incoming Kindergarten children.
- The Quality Improvement Group, a workgroup facilitated by the Marin Child Care Commission, meets monthly to collaborate and better integrate their support activities with child care programs and the resources available for quality improvement.
- The Early Childhood Education Partnership with representation from Marin County Office of Education, the Marin Child Care Council, First 5 Marin, and the Child Care Commission

**THE ISSUE**

**Improving the Child Care Infrastructure:** There is a need for better integration of and investment in Marin’s efforts to coordinate the child care system.

**THE KEY INDICATORS TO WATCH**

- Availability of an accurate and accessible source of data and resources regarding child care in the county
- Level of collaboration and coordination of services as measured by the Resource and Referral Provider survey
- Amount of contact between early childhood professionals and their elementary school counterparts
- Number of child care programs and elementary schools with formalized transition practices



meets on a regular basis to exchange information, ideas and to improve coordination and linkages of early care and education activities and opportunities.

### Potential Strategies

- Convene stakeholders to develop a process to identify a lead individual or organization to coordinate collaboration efforts.
- Establish a cohesive, systematic approach involving all training agencies resulting in a collaborative training calendar.
- Strengthen and support the coordination of professional development opportunities for child care professionals
- Explore the potential for developing a P-16 Council (an assembly of education, business, and community leaders charged with developing strategies to better coordinate, integrate, and improve education for preschool through college students) in Marin.
- Enhance relationships between ECE and K-3 professionals by providing opportunities for joint training, curriculum development, sharing information about children's progress, networking, etc.



**Objective Area:**

**Policy and Advocacy — Increase public information and advocacy efforts to support the establishment of the child care system as a vital component of Marin’s infrastructure to support families and sustain community development.**

**The Objectives:**

- A. Coordinate policy and advocacy efforts of child care and other family and children support systems.
- B. Increase public ownership of and investment in child care.
- C. Increase private ownership of and investment in child care.

**Some Recent Initiatives**

- First 5 Marin is working with stakeholders throughout the county to craft a common vision for the well-being of all of Marin's children.
- Marin Community Foundation’s Education Initiative includes building public will to ensure all children are well-prepared to start Kindergarten.
- Parent Voices: Marin Child Care Council runs the Marin chapter of this statewide group of parents (parent-led, parent-run grassroots organizing) that helps parents meet directly with their legislators to advocate for increased childcare funding on a statewide and/or local level.

**Potential Strategies**

- Develop county-wide policy platform on issues that affect children and families in Marin.
- Coordinate with existing efforts to develop a public awareness campaign on the importance of early childhood care and education.
- Designate a child care point person to track local regulations affecting child care and to advocate for child care elements in county and city general plans.
- Develop a Child Care Economic Impact Report for Marin County.
- Establish an exploratory committee to pursue new local revenue streams to support child care.

**THE ISSUE**

*Stepping up Policy and Advocacy Efforts:* The need for coordination to support child care extends beyond those agencies and individuals involved in the local child care system to include other child and family support systems, as well as state and local policy and advocacy efforts.

**THE KEY INDICATORS TO WATCH**

- Existence and impact of Child Care Commission Public Policy Platform
- Amount of public and private investment in child care
- Frequency and quality of public education messages about child care in the media



## APPENDIX 1

# REFERENCES

The reports and data sources below were reviewed for information and/or analysis related to Marin County's child care system.

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## APPENDIX 2

# DEMAND ESTIMATION METHODOLOGY

The Master Plan Committee worked with the Marin Child Care Council to generate supply data, and partnered with Bay Area Economics (BAE) to generate child care demand data. While the Availability Section contains some information on the demand estimation methodology, additional detailed information is included here.<sup>49</sup>

### *Countywide versus Locality Estimations*

The methodologies for determining child care gaps between supply and demand are slightly different at the county and locality-levels:

- a) Countywide estimates combine US Census data (Primary Users Microdata Sample) with the National Survey of American Families child care use patterns.
- b) Locality estimates (including cities, towns and unincorporated areas) combine available US Census categories at the locality-level with the National Survey of American Families child care use patterns.

The countywide model uses individual census records, which allow for cross-tabbing very specific demographic subpopulations with child care use patterns within these subpopulations. The locality-level model is restricted by available US Census and population projection information within locality boundaries.

### *Age Projections at the County and Locality Levels*

Age projections were made using California Department of Finance (DOF) data at the county-level and Association of Bay Area Governments (ABAG) data at the locality-level. Association of Bay Area Government's projection model apportions countywide projections from the Department of Finance to zip codes in the county based on historic development trends, available land, zoning, and a "network of neighborhoods" model which distributes growth around public transportation corridors and existing urban areas. ABAG projects the population of children by birth to four years and five to 19 years; therefore, the locality-level projections assume growth among infants, toddlers, and preschoolers at the same annual growth rate as birth to four year olds, and growth among school-age children (five to 12 year olds) at the same annual growth rate as five to 19 year olds.

While matching the DOF projections to the county level and ABAG projections to the locality level provides the most accurate demand estimations possible at each level, it does create some discrepancies in overall demand estimates. Since ABAG projects fewer children than the

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<sup>49</sup> Explanation of the demand estimation methodology is drawn from the *Alameda County, Early Care and Education for All, Needs Assessment Report*, First 5 Alameda County, written by Design Community & Environment in association with Bay Area Economics, June 2006.



Department of Finance, the overall demand estimate for the locality-level is 6% lower than the county level.

## ***Family Characteristics***

The demand methodology applies findings from the National Survey of American Families, a comprehensive study that surveyed over 25,000 families. This study identified four family characteristics as predictors of child care use: 1) child's age, 2) family income, 3) labor force participation (LFP), and 4) ethnicity.<sup>50</sup> The model also accounts for "pent-up" demand, those households that are not using child care services but would if an affordable and quality option were available to them, as well as school-age children currently under self-care.

### **Child's Age**

Age groupings for supply in this report follow community care licensing groupings: infant (0-1 year old), preschool (2-5 years old), and school-age (6 years old and older), unless otherwise noted. Demand age groupings adhere to the same licensing grouping for infants, but at the county-level, the percentage of five-year olds estimated to be not yet in kindergarten (37%) has been apportioned to the preschool group and the balance to the school-age group. At the locality-level, all five year olds are included in the school-age group. Given that children transition to kindergarten around age five, this a difficult group for which to estimate demand.

### **Family Income**

Income of families below and above 200% of the Federal Poverty Level indicated statistically significant differences in child care use. A family's income often determines their ability to provide child care outside the home and the type of care they will access. Without subsidized care, affordability becomes a significant barrier to child care. While families use an assortment of care options, the type of care they choose depends partially on what they can afford and their work schedules.

### **Labor Force Participation**

Parent workforce participation plays an important role in determining child care use, as families with one or more parents not working are less likely to access center-based or non-relative out of home care. Families with both parents working or a single parent who works are significantly more likely to access child care outside of the home than families with one or more parents not working.

### **Ethnicity**

In this report, ethnicity is broken down in to four sub-groups: African American; Latino; Native American and Multi-racial; and White, Asian, and Pacific Islander. The NSAF found similar child care use patterns between Asian, Pacific Islander, and White families and, as such, they are grouped together. Also, the NSAF could not distinguish between child care use patterns of Native Americans and Multi-racial families.

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<sup>50</sup> The measure used to quantify work-related demand for care is called the labor force participation rate (LFP), or the percentage of children who need care because either both their parents work full time or they live with a single parent who works full time.



## ***Pent-Up Demand***

The demand estimation methodology also takes into account those households that would access child care if an affordable and quality option were available to them, as well as school-age children currently under self-care (in economic terms, this is referred to as “pent-up demand”). Approximately half of parents (51% of infant/toddler parents and 49% of preschool parents) below 200% of the poverty level said they would access child care if a quality and affordable option were available. Whereas, only 26% of infant/toddler parents and 29% of preschool parents equal to or above 200% of the poverty level said they would access child care if a quality and affordable option were available.<sup>51</sup>

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<sup>51</sup> National Household Education Survey, US Department of Education, 2001.



### APPENDIX 3

# DEMAND ESTIMATION BY FAMILY CHARACTERISTICS

**FIGURE H — ESTIMATED DISTRIBUTION OF CARE FOR ALL CHILDREN IN MARIN COUNTY, BY AGE, 2000-2015**

Primary Care Arrangement	2000		2007		2010		2015	
	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total
<b>Infant</b>								
Center Care	583	11%	491	10%	451	10%	481	9%
Family Licensed Care	602	11%	536	11%	504	11%	556	11%
Other care	2,424	45%	2,277	46%	2,186	47%	2,466	47%
Parent-only care	1,772	33%	1,630	33%	1,552	33%	1,735	33%
<i>Subtotal</i>	5,381	100%	4,934	100%	4,693	100%	5,238	100%
<b>Preschool</b>								
Center Care	3,986	44%	4,474	42%	3,889	42%	3,746	42%
Family Licensed Care	934	10%	1,047	10%	903	10%	864	10%
Other care	2,669	29%	3,180	30%	2,795	30%	2,757	31%
Parent-only care	1,516	17%	1,856	18%	1,641	18%	1,637	18%
<i>Subtotal</i>	9,114	100%	10,557	100%	9,228	100%	9,004	100%
<b>School-Age</b>								
Center Care	3,671	17%	3,734	16%	3,951	16%	3,759	16%
Family Licensed Care	1,356	6%	1,360	6%	1,434	6%	1,351	6%
Other care	6,724	30%	6,938	30%	7,391	30%	7,052	29%
Parent-only care	10,488	47%	11,259	48%	12,157	49%	11,803	49%
<i>Subtotal</i>	22,238	100%	23,291	100%	24,933	100%	23,965	100%
<b>Total</b>	<b>36,733</b>		<b>38,782</b>		<b>38,854</b>		<b>38,207</b>	

Sources: Bay Area Economics using data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census Data was projected to 2007 using Department of Finance county growth rate.



**FIGURE I — CHILD CARE DEMAND BY INCOME AND PARENT LABOR FORCE PARTICIPATION, 2007**

Primary Care Arrangement	Children in Families at Less than 200% of Poverty					Children in Families at More than 200% of Poverty						
	Single working parent or both parents work		1 or more parent not working		Total	Single working parent or both parents work		1 or more parent not working		Total		
	#	%	#	%	#	%	#	%	#	%	#	%
<b>Infant/Toddler</b>												
Center Care	46	12%	27	4%	73	6%	310	14%	107	7%	417	11%
Family Licensed Care	51	14%	70	9%	121	11%	333	15%	83	5%	416	11%
Other care	203	55%	369	48%	572	50%	1,113	50%	592	37%	1,705	45%
Parent-only care	69	19%	299	39%	368	32%	455	21%	807	51%	1,262	33%
<b>Total</b>	<b>369</b>	<b>100%</b>	<b>766</b>	<b>100%</b>	<b>1,135</b>	<b>100%</b>	<b>2,211</b>	<b>100%</b>	<b>1,590</b>	<b>100%</b>	<b>3,801</b>	<b>100%</b>
<b>Preschool, plus 5 y/o in KG</b>												
Center Care	571	40%	522	36%	1,093	38%	1955	44%	1426	43%	3,381	44%
Family Licensed Care	156	11%	55	4%	211	7%	655	15%	182	6%	837	11%
Other care	505	36%	413	29%	918	32%	1,426	32%	836	25%	2,262	29%
Parent-only care	183	13%	449	31%	632	22%	377	9%	847	26%	1,224	16%
<b>Total</b>	<b>1,414</b>	<b>100%</b>	<b>1,438</b>	<b>100%</b>	<b>2,852</b>	<b>100%</b>	<b>4,413</b>	<b>100%</b>	<b>3,291</b>	<b>100%</b>	<b>7,704</b>	<b>100%</b>
<b>School-Age</b>												
Center Care	407	14%	274	9%	681	11%	2666	23%	385	7%	3,052	18%
Family Licensed Care	283	10%	54	2%	337	6%	862	7%	162	3%	1,024	6%
Other care	963	33%	462	15%	1,425	24%	4,040	35%	1,473	25%	5,513	32%
Parent-only care	1,234	43%	2,270	74%	3,505	59%	3,955	34%	3,799	65%	7,754	45%
<b>Total</b>	<b>2,888</b>	<b>100%</b>	<b>3,059</b>	<b>100%</b>	<b>5,948</b>	<b>100%</b>	<b>11,522</b>	<b>100%</b>	<b>5,818</b>	<b>100%</b>	<b>17,342</b>	<b>100%</b>

Source: Bay Area Economics, using data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census Data was projected to 2007 using Department of Finance county growth rate.



**FIGURE J — CHILD CARE DEMAND BY ETHNICITY, 2007**

Primary Care Arrangement	White, Asian, Pacific Islander		Latino		Black		Native American and Multiracial		Total	
<b>Infant/Toddler</b>										
Center Care	384	12%	72	5%	22	19%	13	12%	491	10%
Family Licensed Care	368	12%	149	9%	6	5%	12	11%	535	11%
Other care	1,337	43%	834	52%	54	47%	52	46%	2,277	46%
Parent-only care	1,021	33%	538	34%	33	29%	35	31%	1,627	33%
Total	3,110	100%	1,593	100%	115	100%	112	100%	4,930	100%
<b>Preschool, plus 5 y/o in KG</b>										
Center Care	2,680	45%	1,376	37%	95	54%	323	44%	4,474	42%
Family Licensed Care	654	11%	306	8%	11	6%	76	10%	1,047	10%
Other care	1,696	28%	1,223	33%	44	25%	215	29%	3,178	30%
Parent-only care	931	16%	777	21%	26	15%	123	17%	1,857	18%
Total	5,961	100%	3,682	100%	176	100%	737	100%	10,556	100%
<b>School-Age</b>										
Center Care	2,314	17%	1,078	14%	149	28%	192	16%	3,733	16%
Family Licensed Care	887	6%	375	5%	29	5%	71	6%	1,362	6%
Other care	4,306	31%	2,147	28%	134	25%	353	30%	6,940	30%
Parent-only care	6,477	46%	4,008	53%	227	42%	548	47%	11,260	48%
Total	13,984	100%	7,608	100%	539	100%	1,164	100%	23,295	100%

Source: Bay Area Economics, using data from 2000 Census, National Survey of American Families, PUMS, National Household Education Survey. Census Data was projected to 2007 using Department of Finance county growth rate.



**APPENDIX 4**

**PROFILES OF MARIN COUNTY  
JURISDICTIONS**

## Marin County Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	16%	71%	2%	4%	1%	5%	100%
0 - 1 Years	1,046	3,596	103	226	24	311	5,306
2 - 4 Years	1,488	5,608	169	301	51	473	8,090
5 - 12 Years	3,346	16,825	609	973	174	1,206	23,133
13 Years +	21,471	168,225	6,065	9,908	1,099	3,992	210,760
<b>Total 0-12 Years</b>	<b>5,880</b>	<b>26,029</b>	<b>881</b>	<b>1,500</b>	<b>249</b>	<b>1,990</b>	<b>36,529</b>
<b>Total Population</b>	<b>27,351</b>	<b>194,254</b>	<b>6,946</b>	<b>11,408</b>	<b>1,348</b>	<b>5,982</b>	<b>247,289</b>

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	2,464	28%	10,580	26%
5 years	504	6%	2,235	6%
6 to 11 years	2,901	33%	14,334	35%
12 to 17 years	2,818	32%	13,378	33%
<b>Total</b>	<b>8,687</b>	<b>100%</b>	<b>40,527</b>	<b>100%</b>

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	29,347	80%
Spanish or Spanish Creole	4,312	12%
French	463	1%
Chinese	342	1%
Vietnamese	326	1%
All Other Languages	1,937	5%
<b>Total</b>	<b>36,727</b>	<b>100%</b>

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	8,300	53%
One or more parents not working	7,248	47%
<b>6 to 17 years:</b>		
Single working parent or both parents working	21,971	68%
One or more parents not working	10,496	32%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

## Marin County Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	8,926	8,458	7,802	7,099	14%
2 - 4 Years	13,610	12,896	11,895	10,823	22%
5 - 12 Years	36,481	37,031	37,871	37,347	63%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	536	504	556
Center-Based	491	451	481
At-Home/Relative Care	3,907	3,737	4,201
<b>2-4 Years</b>			
Family Licensed Care	1,047	903	864
Center-Based	4,474	3,889	3,746
At-Home/Relative Care	5,036	4,435	4,394
<b>5 - 12 Years</b>			
Family Licensed Care	1,360	1,434	1,351
Center-(After/Before School)	3,734	3,951	3,759
At-Home/Relative Care	18,197	19,548	18,855

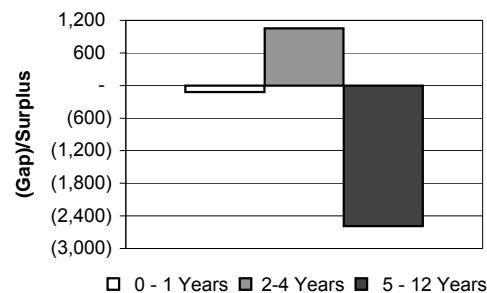
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	526	526
Center-Based	381	381
<b>2-4 Years</b>		
Family Licensed Care	1,146	1,146
Center-Based	5,428	5,428
<b>5 - 12 Years</b>		
Family Licensed Care	207	207
Center-(After/Before School)	2,299	2,299

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	22
Center-Based	(110)	(70)
<i>Subtotal</i>	(120)	(49)
<b>2-4 Years</b>		
Family Licensed Care	99	243
Center-Based	954	1,539
<i>Subtotal</i>	1,053	1,781
<b>5 - 12 Years</b>		
Family Licensed Care	(1,153)	(1,227)
Center-(After/Before School)	(1,435)	(1,652)
<i>Subtotal</i>	(2,588)	(2,879)
<b>Total</b>	<b>(1,655)</b>	<b>(1,146)</b>

Marin County ECE Supply, 2006



Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

## Belvedere/Tiburon Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	4%	85%	1%	4%	1%	5%	100%
0 - 1 Years	17	241	*	15	*	19	294
2 - 4 Years	24	436	*	16	*	26	505
5 - 12 Years	55	1,146	*	65	*	55	1,339
13 Years +	352	9,759	82	506	34	177	10,910
Total 0-12 Years	96	1,823	11	96	12	100	2,138
Total Population	448	11,582	93	602	46	277	13,048

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	29	19%	707	27%
5 years	15	10%	187	7%
6 to 11 years	35	23%	948	36%
12 to 17 years	71	47%	776	30%
Total	150	100%	2,618	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	1,830	88%
Spanish or Spanish Creole	60	3%
Persian	25	3%
Chinese	38	2%
All Other Languages	100	5%
Total	2,086	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	323	34%
One or more parents not working	615	66%
<b>6 to 17 years:</b>		
Single working parent or both parents working	983	54%
One or more parents not working	830	46%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Belvedere/Tiburon Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	216	208	198	206	11%
2 - 4 Years	370	358	340	354	18%
5 - 12 Years	1,411	1,377	1,328	1,197	71%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	20	19	19
Center-Based	20	19	20
At-Home/Relative Care	168	160	166
<b>2-4 Years</b>			
Family Licensed Care	32	30	31
Center-Based	157	149	155
At-Home/Relative Care	168	159	166
<b>5 - 12 Years</b>			
Family Licensed Care	80	77	69
Center-(After/Before School)	205	198	178
At-Home/Relative Care	1,092	1,053	949

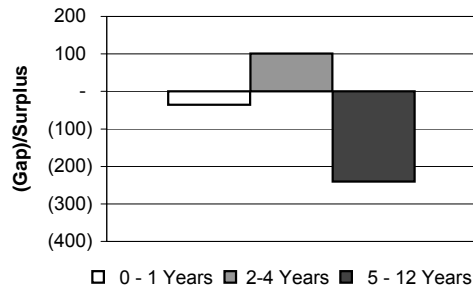
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	*	*
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	*	*
Center-Based	282	282
<b>5 - 12 Years</b>		
Family Licensed Care	*	*
Center-(After/Before School)	42	42

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(16)	(15)
Center-Based	(20)	(19)
<i>Subtotal</i>	(36)	(33)
<b>2-4 Years</b>		
Family Licensed Care	(24)	(22)
Center-Based	125	133
<i>Subtotal</i>	101	110
<b>5 - 12 Years</b>		
Family Licensed Care	(78)	(75)
Center-(After/Before School)	(163)	(156)
<i>Subtotal</i>	(241)	(231)
<b>Total</b>	<b>(175)</b>	<b>(154)</b>

Belvedere/Tiburon ECE Supply, 2006



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Bolinas Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	14%	77%	*	*	0%	*	100%
0 - 1 Years	*	*	0	0	0	*	13
2 - 4 Years	*	25	0	0	0	*	31
5 - 12 Years	19	106	*	*	0	*	139
13 Years +	69	1,235	21	23	*	21	1,377
Total 0-12 Years	25	140	*	*	0	*	183
Total Population	94	1,375	27	27	*	29	1,560

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	13	13%	37	20%
5 years	0	0%	*	3%
6 to 11 years	26	27%	71	38%
12 to 17 years	58	60%	72	39%
Total	97	100%	186	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	268	95%
Spanish or Spanish Creole	11	0%
All Other Languages	*	*
Total	282	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	35	63%
One or more parents not working	21	38%
<b>6 to 17 years:</b>		
Single working parent or both parents working	160	82%
One or more parents not working	35	18%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Bolinas Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	23	22	21	20	13%
2 - 4 Years	56	53	50	47	30%
5 - 12 Years	106	99	91	96	57%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	17	16	15
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	24	22	21
At-Home/Relative Care	24	22	21
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	18	17	18
At-Home/Relative Care	70	64	68

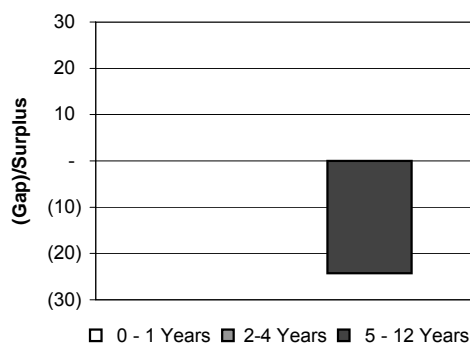
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	*	*
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	*	*
Center-Based	30	30
<b>5 - 12 Years</b>		
Family Licensed Care	*	*
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	*	*
<i>Subtotal</i>	*	*
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(18)	(17)
<i>Subtotal</i>	(24)	(22)
<b>Total</b>	<b>(22)</b>	<b>(18)</b>

Bolinas ECE Supply, 2006 \*



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Corte Madera Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	7%	81%	1%	4%	*	6%	100%
0 - 1 Years	17	183	*	16	*	11	230
2 - 4 Years	32	258	*	13	*	34	341
5 - 12 Years	59	777	11	37	*	49	937
13 Years +	396	6,419	63	447	36	150	7,511
<b>Total 0-12 Years</b>	<b>108</b>	<b>1,218</b>	<b>15</b>	<b>66</b>	<b>*</b>	<b>94</b>	<b>1,508</b>
<b>Total Population</b>	<b>504</b>	<b>7,637</b>	<b>78</b>	<b>513</b>	<b>43</b>	<b>244</b>	<b>9,019</b>

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	34	25%	533	28%
5 years	21	15%	106	6%
6 to 11 years	48	35%	648	34%
12 to 17 years	33	24%	605	32%
<b>Total</b>	<b>136</b>	<b>100%</b>	<b>1,892</b>	<b>100%</b>

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	1,270	87%
Spanish or Spanish Creole	68	5%
Chinese	43	3%
Portuguese	24	2%
All Other Languages	60	4%
<b>Total</b>	<b>1,465</b>	<b>100%</b>

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	415	60%
One or more parents not working	279	40%
<b>6 to 17 years:</b>		
Single working parent or both parents working	955	74%
One or more parents not working	344	26%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Corte Madera Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	220	203	180	166	14%
2 - 4 Years	326	301	268	246	21%
5 - 12 Years	946	964	993	945	66%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	25	22	20
Center-Based	25	22	21
At-Home/Relative Care	153	136	125
<b>2-4 Years</b>			
Family Licensed Care	34	30	28
Center-Based	134	119	109
At-Home/Relative Care	133	119	109
<b>5 - 12 Years</b>			
Family Licensed Care	67	69	65
Center-(After/Before School)	178	184	175
At-Home/Relative Care	719	741	705

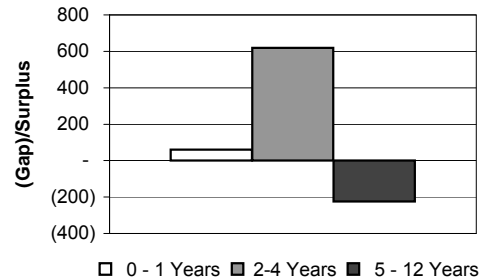
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	53	53
Center-Based	57	57
<b>2-4 Years</b>		
Family Licensed Care	116	116
Center-Based	671	671
<b>5 - 12 Years</b>		
Family Licensed Care	21	21
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	28	31
Center-Based	32	35
<i>Subtotal</i>	60	66
<b>2-4 Years</b>		
Family Licensed Care	82	86
Center-Based	537	552
<i>Subtotal</i>	619	638
<b>5 - 12 Years</b>		
Family Licensed Care	(46)	(48)
Center-(After/Before School)	(178)	(184)
<i>Subtotal</i>	(224)	(231)
<b>Total</b>	<b>455</b>	<b>472</b>

Corte Madera ECE Supply, 2006



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

## Dillon Beach Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	0%	90%	0%	*	0%	*	100%
0 - 1 Years	0	*	0	0	0	0	*
2 - 4 Years	0	*	0	0	0	0	*
5 - 12 Years	0	17	0	*	0	*	20
13 Years +	*	271	*	*	*	*	290
Total 0-12 Years	0	26	0	*	0	*	29
Total Population	*	297	*	*	*	*	319

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	0	0%	12	29%
5 years	0	0%	*	14%
6 to 11 years	0	0%	0	0%
12 to 17 years	0	0%	24	57%
Total	0	0%	42	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	30	100%
All Other Languages	0	0%
Total	30	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	*	*
One or more parents not working	0	0%
<b>6 to 17 years:</b>		
Single working parent or both parents working	24	100%
One or more parents not working	0	0%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Dillon Beach Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	*	*	*	*	*
2 - 4 Years	13	12	12	11	29%
5 - 12 Years	28	27	26	25	63%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	*	*	*
At-Home/Relative Care	17	16	16

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>Total</b>	<b>(17)</b>	<b>(16)</b>

#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Fairfax Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	8%	84%	1%	2%	*	5%	100%
0 - 1 Years	12	139	*	4	0	*	162
2 - 4 Years	21	221	*	4	0	16	265
5 - 12 Years	63	623	*	11	*	43	750
13 Years +	365	6,492	71	167	51	153	7,299
Total 0-12 Years	96	983	11	19	*	63	1,177
Total Population	461	7,475	82	186	56	216	8,476

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	36	0%	359	25%
5 years	*	0%	50	4%
6 to 11 years	82	0%	489	34%
12 to 17 years	95	0%	526	37%
Total	222	0%	1,424	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	1,160	92%
Spanish or Spanish Creole	39	3%
French	22	2%
All Other Languages	34	3%
Total	1,255	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	240	54%
One or more parents not working	204	46%
<b>6 to 17 years:</b>		
Single working parent or both parents working	906	76%
One or more parents not working	286	24%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Fairfax Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	197	180	156	138	15%
2 - 4 Years	322	294	256	226	24%
5 - 12 Years	726	736	752	743	61%

### Child Care Demand by Age

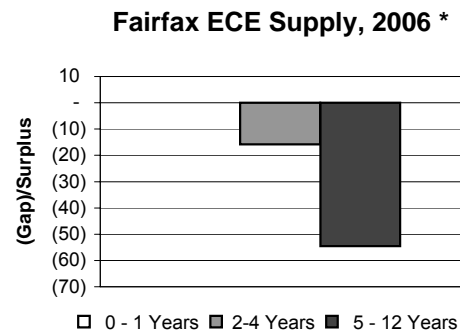
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	21	18	16
Center-Based	21	18	16
At-Home/Relative Care	135	118	104
<b>2-4 Years</b>			
Family Licensed Care	31	27	24
Center-Based	129	112	99
At-Home/Relative Care	131	114	101
<b>5 - 12 Years</b>			
Family Licensed Care	50	52	51
Center-(After/Before School)	136	139	137
At-Home/Relative Care	550	562	555

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	17	17
Center-Based	19	19
<b>2-4 Years</b>		
Family Licensed Care	36	36
Center-Based	108	108
<b>5 - 12 Years</b>		
Family Licensed Care	*	*
Center-(After/Before School)	125	125

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	*
Subtotal	(*)	0
<b>2-4 Years</b>		
Family Licensed Care	*	*
Center-Based	(21)	(*)
Subtotal	(16)	*
<b>5 - 12 Years</b>		
Family Licensed Care	(43)	(45)
Center-(After/Before School)	(11)	(14)
Subtotal	(55)	(59)
<b>Total</b>	<b>(76)</b>	<b>(54)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Forest Knolls Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	7%	86%	*	*	*	*	100%
0 - 1 Years	0	22	0	*	0	*	24
2 - 4 Years	*	28	*	0	*	*	37
5 - 12 Years	*	104	0	*	*	*	118
13 Years +	44	736	18	*	12	20	840
Total 0-12 Years	12	154	*	*	*	*	179
Total Population	56	890	19	15	14	25	1,019

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	22	47%	23	13%
5 years	0	0%	0	0%
6 to 11 years	*	*	75	44%
12 to 17 years	19	40%	74	43%
Total	47	100%	172	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	174	96%
Spanish or Spanish Creole	*	*
All Other Languages	0	0%
Total	181	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	39	87%
One or more parents not working	*	*
<b>6 to 17 years:</b>		
Single working parent or both parents working	125	75%
One or more parents not working	42	25%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Forest Knolls Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	22	21	20	19	14%
2 - 4 Years	34	32	31	29	21%
5 - 12 Years	103	98	92	88	65%

### Child Care Demand by Age

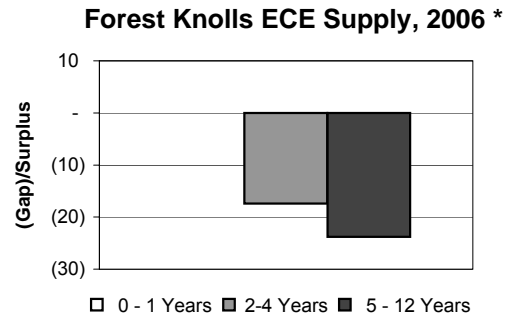
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	13	12	12
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	13	12	12
At-Home/Relative Care	11	11	10
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	17	16	15
At-Home/Relative Care	68	64	60

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(13)	(12)
<i>Subtotal</i>	(17)	(16)
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(17)	(16)
<i>Subtotal</i>	(24)	(22)
<b>Total</b>	<b>(48)</b>	<b>(45)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Greenbrae Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	3%	87%	*	2%	1%	7%	100%
0 - 1 Years	*	184	*	*	0	22	218
2 - 4 Years	16	312	*	*	*	31	369
5 - 12 Years	35	1,010	*	27	11	60	1,144
13 Years +	307	9,370	*	356	28	147	10,268
Total 0-12 Years	60	1,506	*	36	13	113	1,731
Total Population	367	10,876	63	392	41	260	11,999

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	47	20%	499	24%
5 years	18	8%	97	5%
6 to 11 years	77	33%	724	34%
12 to 17 years	88	38%	802	38%
Total	230	100%	2,122	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	1,609	89%
Spanish or Spanish Creole	48	3%
French	37	2%
Portuguese	37	2%
All Other Languages	82	5%
Total	1,813	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	264	40%
One or more parents not working	391	60%
<b>6 to 17 years:</b>		
Single working parent or both parents working	803	48%
One or more parents not working	883	52%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

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## Greenbrae Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	199	195	189	199	12%
2 - 4 Years	337	330	321	337	20%
5 - 12 Years	1,209	1,167	1,107	1,019	69%

### Child Care Demand by Age

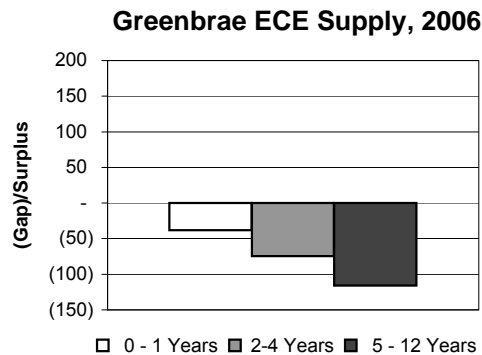
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	20	19	20
Center-Based	20	20	21
At-Home/Relative Care	155	151	158
<b>2-4 Years</b>			
Family Licensed Care	31	31	32
Center-Based	146	142	149
At-Home/Relative Care	153	148	156
<b>5 - 12 Years</b>			
Family Licensed Care	64	61	56
Center-(After/Before School)	161	152	140
At-Home/Relative Care	942	894	823

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	*	*
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	*	*
Center-Based	98	98
<b>5 - 12 Years</b>		
Family Licensed Care	*	*
Center-(After/Before School)	108	108

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(18)	(17)
Center-Based	(20)	(20)
<i>Subtotal</i>	(38)	(37)
<b>2-4 Years</b>		
Family Licensed Care	(26)	(26)
Center-Based	(48)	(44)
<i>Subtotal</i>	(75)	(69)
<b>5 - 12 Years</b>		
Family Licensed Care	(63)	(60)
Center-(After/Before School)	(53)	(44)
<i>Subtotal</i>	(116)	(104)
<b>Total</b>	<b>(228)</b>	<b>(211)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Inverness Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	46%	50%	*	0%	*	*	100%
0 - 1 Years	12	*	0	0	0	*	21
2 - 4 Years	17	20	*	0	0	0	38
5 - 12 Years	49	58	*	0	*	0	112
13 Years +	192	612	*	*	*	*	824
Total 0-12 Years	78	86	*	0	*	*	171
Total Population	270	698	*	*	*	*	995

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	37	36%	39	59%
5 years	*	*	0	0%
6 to 11 years	41	40%	22	33%
12 to 17 years	18	18%	*	*
Total	102	100%	66	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	27	29%
Spanish or Spanish Creole	65	71%
All Other Languages	0	0%
Total	92	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	35	49%
One or more parents not working	37	51%
<b>6 to 17 years:</b>		
Single working parent or both parents working	52	60%
One or more parents not working	34	40%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

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## Inverness Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	17	17	16	16	12%
2 - 4 Years	31	31	29	29	22%
5 - 12 Years	94	92	89	87	66%

### Child Care Demand by Age

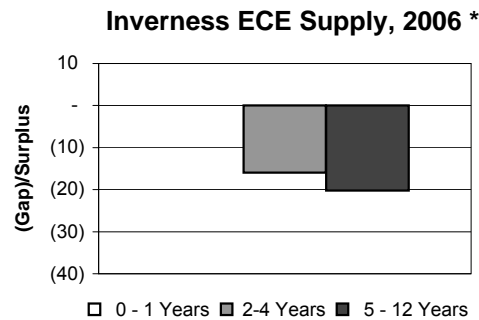
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	13	13	12
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	12	12	12
At-Home/Relative Care	14	13	13
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	15	15	14
At-Home/Relative Care	69	67	65

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(12)	(12)
<i>Subtotal</i>	(16)	(15)
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(15)	(15)
<i>Subtotal</i>	(20)	(20)
<b>Total</b>	<b>(40)</b>	<b>(39)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Lagunitas Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	11%	79%	*	*	0%	*	100%
0 - 1 Years	*	*	0	0	0	*	13
2 - 4 Years	*	15	0	*	0	*	21
5 - 12 Years	*	77	*	0	0	*	93
13 Years +	31	607	*	*	11	21	686
Total 0-12 Years	14	100	*	*	0	*	127
Total Population	45	707	*	12	11	31	813

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	*	*	52	30%
5 years	0	0%	0	0%
6 to 11 years	13	50%	63	37%
12 to 17 years	*	*	56	33%
Total	26	100%	171	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	120	88%
Spanish or Spanish Creole	17	12%
All Other Languages	0	0%
Total	137	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	23	38%
One or more parents not working	37	62%
<b>6 to 17 years:</b>		
Single working parent or both parents working	84	61%
One or more parents not working	53	39%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Lagunitas Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	17	16	15	15	14%
2 - 4 Years	27	26	25	24	23%
5 - 12 Years	77	74	70	66	64%

### Child Care Demand by Age

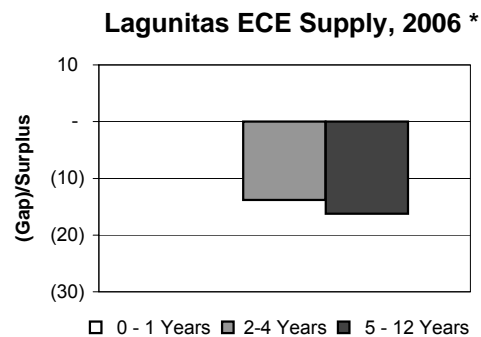
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	13	12	12
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	11	11	*
At-Home/Relative Care	12	12	11
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	12	11	*
At-Home/Relative Care	58	54	52

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(11)	(11)
<i>Subtotal</i>	(14)	(13)
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(12)	(11)
<i>Subtotal</i>	(16)	(15)
<b>Total</b>	<b>(33)</b>	<b>(31)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Larkspur Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	5%	86%	*	2%	*	5%	100%
0 - 1 Years	*	140	0	*	*	*	160
2 - 4 Years	*	188	*	*	*	15	222
5 - 12 Years	30	449	*	11	*	24	524
13 Years +	212	5,281	40	217	14	96	5,860
Total 0-12 Years	48	777	*	20	*	44	906
Total Population	260	6,058	47	237	24	140	6,766

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	25	28%	391	36%
5 years	0	0%	36	3%
6 to 11 years	22	25%	351	32%
12 to 17 years	42	47%	320	29%
Total	89	100%	1,098	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	717	92%
French	22	3%
Spanish or Spanish Creole	17	2%
Italian	10	1%
All Other Languages	14	2%
Total	780	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	275	62%
One or more parents not working	168	38%
<b>6 to 17 years:</b>		
Single working parent or both parents working	469	64%
One or more parents not working	262	36%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Larkspur Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	158	145	127	117	14%
2 - 4 Years	219	201	176	163	20%
5 - 12 Years	651	662	677	665	66%

### Child Care Demand by Age

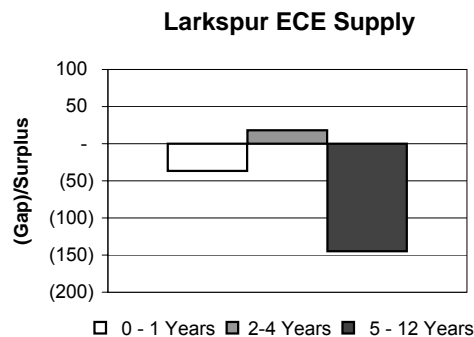
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	18	16	15
Center-Based	18	16	15
At-Home/Relative Care	108	95	88
<b>2-4 Years</b>			
Family Licensed Care	23	20	19
Center-Based	89	78	72
At-Home/Relative Care	87	76	71
<b>5 - 12 Years</b>			
Family Licensed Care	40	41	40
Center-(After/Before School)	105	107	105
At-Home/Relative Care	473	484	475

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	130	130
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(18)	(16)
Center-Based	(18)	(16)
<i>Subtotal</i>	(37)	(32)
<b>2-4 Years</b>		
Family Licensed Care	(23)	(20)
Center-Based	41	52
<i>Subtotal</i>	18	32
<b>5 - 12 Years</b>		
Family Licensed Care	(40)	(41)
Center-(After/Before School)	(105)	(107)
<i>Subtotal</i>	(145)	(148)
<b>Total</b>	<b>(163)</b>	<b>(149)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

## Marshall Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	63%	37%	0%	0%	0%	0%	100%
0 - 1 Years	*	*	0	0	0	0	*
2 - 4 Years	*	*	0	0	0	0	*
5 - 12 Years	22	16	0	0	0	0	38
13 Years +	77	250	*	*	*	*	340
Total 0-12 Years	34	20	0	0	0	0	54
Total Population	111	270	*	*	*	*	394

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	14	30%	*	*
5 years	0	0%	*	*
6 to 11 years	29	63%	54	77%
12 to 17 years	*	*	*	*
Total	46	100%	70	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	21	22%
Spanish or Spanish Creole	48	51%
German	25	27%
All Other Languages	0	0%
Total	94	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	16	67%
One or more parents not working	*	33%
<b>6 to 17 years:</b>		
Single working parent or both parents working	36	41%
One or more parents not working	52	59%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Marshall Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	*	*	*	*	14%
2 - 4 Years	13	12	12	11	24%
5 - 12 Years	32	31	30	29	61%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	*	*	*
At-Home/Relative Care	26	25	24

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>Total</b>	<b>(13)</b>	<b>(12)</b>

#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Mill Valley Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	5%	83%	1%	5%	1%	6%	100%
0 - 1 Years	36	539	*	42	*	40	664
2 - 4 Years	46	778	*	47	*	61	947
5 - 12 Years	129	2,319	32	125	15	156	2,776
13 Years +	842	21,441	256	1,306	101	385	24,331
Total 0-12 Years	211	3,636	46	214	23	257	4,387
Total Population	1,053	25,077	302	1,520	124	642	28,718

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	167	28%	1,347	26%
5 years	16	3%	253	5%
6 to 11 years	213	36%	1,861	36%
12 to 17 years	198	33%	1,767	34%
Total	594	100%	5,228	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	3,884	89%
Spanish or Spanish Creole	169	4%
French	102	2%
German	31	1%
All Other Languages	193	4%
Total	4,379	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	870	49%
One or more parents not working	893	51%
<b>6 to 17 years:</b>		
Single working parent or both parents working	893	40%
One or more parents not working	1,332	60%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

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## Mill Valley Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	683	622	540	484	14%
2 - 4 Years	974	886	770	691	19%
5 - 12 Years	3,075	3,084	3,099	2,883	67%

### Child Care Demand by Age

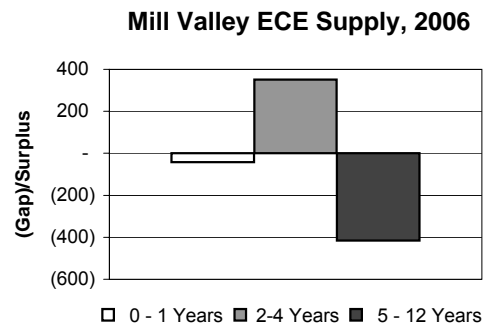
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	68	59	53
Center-Based	69	60	54
At-Home/Relative Care	484	420	377
<b>2-4 Years</b>			
Family Licensed Care	92	80	72
Center-Based	395	343	307
At-Home/Relative Care	400	347	312
<b>5 - 12 Years</b>			
Family Licensed Care	199	200	186
Center-(After/Before School)	527	530	493
At-Home/Relative Care	2,358	2,369	2,204

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	86	86
Center-Based	*	*
<b>2-4 Years</b>		
Family Licensed Care	188	188
Center-Based	650	650
<b>5 - 12 Years</b>		
Family Licensed Care	34	34
Center-(After/Before School)	277	277

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	18	27
Center-Based	(59)	(50)
<i>Subtotal</i>	(42)	(23)
<b>2-4 Years</b>		
Family Licensed Care	96	108
Center-Based	255	307
<i>Subtotal</i>	352	416
<b>5 - 12 Years</b>		
Family Licensed Care	(165)	(166)
Center-(After/Before School)	(250)	(253)
<i>Subtotal</i>	(416)	(419)
<b>Total</b>	<b>(105)</b>	<b>(27)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## Nicasio Profile

### Age by Race

Age Cohort	Hispanic or Latino	Non-Hispanic or Latino					Total
		White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	11%	85%	*	2%	0%	0%	100%
0 - 1 Years	*	11	0	0	0	0	13
2 - 4 Years	*	18	0	0	0	0	22
5 - 12 Years	*	60	*	*	0	0	70
13 Years +	65	398	*	*	*	*	484
Total 0-12 Years	12	89	*	*	0	0	105
Total Population	77	487	*	12	*	*	589

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	15	60%	35	26%
5 years	0	0%	12	9%
6 to 11 years	*	*	47	35%
12 to 17 years	0	0%	39	29%
Total	25	100%	133	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	94	85%
Spanish or Spanish Creole	12	11%
All Other Languages	4	4%
Total	110	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	36	64%
One or more parents not working	20	36%
<b>6 to 17 years:</b>		
Single working parent or both parents working	52	58%
One or more parents not working	37	42%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Nicasio Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	11	11	*	*	12%
2 - 4 Years	19	18	17	16	20%
5 - 12 Years	65	63	61	58	68%

### Child Care Demand by Age

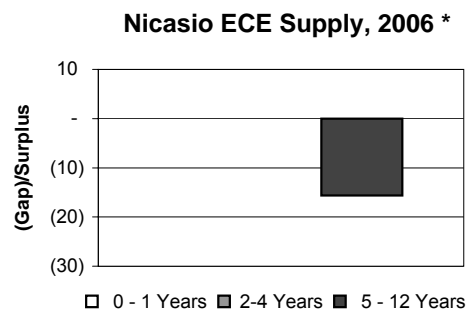
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	11	11	11
At-Home/Relative Care	48	46	44

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(11)	(11)
<i>Subtotal</i>	(16)	(15)
<b>Total</b>	<b>(28)</b>	<b>(27)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## Novato Profile

### Age by Race

Age Cohort	Hispanic or Latino	Non-Hispanic or Latino					Total
		White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	18%	69%	2%	4%	1%	6%	100%
0 - 1 Years	270	800	18	50	*	79	1,226
2 - 4 Years	438	1,269	36	67	*	109	1,928
5 - 12 Years	927	4,108	124	258	48	359	5,824
13 Years +	4,969	36,225	746	2,370	219	1,000	45,529
<b>Total 0-12 Years</b>	<b>1,635</b>	<b>6,177</b>	<b>178</b>	<b>375</b>	<b>66</b>	<b>547</b>	<b>8,978</b>
<b>Total Population</b>	<b>6,604</b>	<b>42,402</b>	<b>924</b>	<b>2,745</b>	<b>285</b>	<b>1,547</b>	<b>54,507</b>

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	548	25%	2,466	24%
5 years	172	8%	700	7%
6 to 11 years	805	36%	3,580	35%
12 to 17 years	681	31%	3,473	34%
<b>Total</b>	<b>2,206</b>	<b>100%</b>	<b>10,219</b>	<b>100%</b>

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	7,600	80%
Spanish or Spanish Creole	1,087	11%
Chinese	95	1%
French	77	1%
Portuguese	73	1%
All Other Languages	569	6%
<b>Total</b>	<b>9,506</b>	<b>100%</b>

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	2,248	58%
One or more parents not working	1,612	42%
<b>6 to 17 years:</b>		
Single working parent or both parents working	5,922	71%
One or more parents not working	2,418	29%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

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## Novato Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	1,318	1,298	1,267	1,212	14%
2 - 4 Years	2,073	2,041	1,993	1,905	22%
5 - 12 Years	5,936	5,930	5,921	5,835	64%

### Child Care Demand by Age

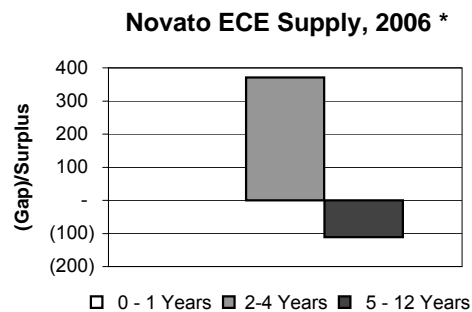
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	150	147	140
Center-Based	136	133	127
At-Home/Relative Care	992	969	926
<b>2-4 Years</b>			
Family Licensed Care	228	223	213
Center-Based	871	851	813
At-Home/Relative Care	903	882	843
<b>5 - 12 Years</b>			
Family Licensed Care	300	300	296
Center-(After/Before School)	792	791	779
At-Home/Relative Care	3,894	3,888	3,831

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	136	136
Center-Based	155	155
<b>2-4 Years</b>		
Family Licensed Care	298	298
Center-Based	1,173	1,173
<b>5 - 12 Years</b>		
Family Licensed Care	54	54
Center-(After/Before School)	927	927

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(14)	(11)
Center-Based	19	22
<i>Subtotal</i>	*	11
<b>2-4 Years</b>		
Family Licensed Care	70	75
Center-Based	302	322
<i>Subtotal</i>	371	397
<b>5 - 12 Years</b>		
Family Licensed Care	(246)	(246)
Center-(After/Before School)	135	136
<i>Subtotal</i>	(111)	(110)
<b>Total</b>	<b>264</b>	<b>299</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## Olema Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	43%	55%	0%	2%	0%	0%	100%
0 - 1 Years	*	0	0	0	0	0	*
2 - 4 Years	*	*	0	0	0	0	*
5 - 12 Years	14	15	0	*	0	0	30
13 Years +	49	140	*	12	*	0	203
Total 0-12 Years	18	23	0	*	0	0	42
Total Population	67	163	*	13	*	0	245

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	0	0%	0	0%
5 years	0	0%	0	0%
6 to 11 years	0	0%	0	0%
12 to 17 years	0	0%	13	100%
Total	0	0%	13	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	13	100%
All Other Languages	0	0%
Total	13	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	0	0%
One or more parents not working	0	0%
<b>6 to 17 years:</b>		
Single working parent or both parents working	13	100%
One or more parents not working	0	0%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Olema Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	*	*	*	*	*
2 - 4 Years	*	*	*	*	*
5 - 12 Years	30	29	28	28	1

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	0	0	0
Center-Based	0	0	0
At-Home/Relative Care	0	0	0
<b>2-4 Years</b>			
Family Licensed Care	0	0	0
Center-Based	0	0	0
At-Home/Relative Care	0	0	0
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	*	*	*
At-Home/Relative Care	11	*	*

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<i>Subtotal</i>	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<i>Subtotal</i>	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>Total</b>	(*)	(*)

#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## Point Reyes Station Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	18%	76%	*	0%	*	*	100%
0 - 1 Years	*	26	*	0	0	*	31
2 - 4 Years	11	32	*	0	0	0	44
5 - 12 Years	25	108	0	0	*	*	143
13 Years +	131	1,456	*	19	*	34	1,656
Total 0-12 Years	39	166	*	0	*	*	218
Total Population	170	1,622	*	19	11	43	1,874

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	19	17%	15	7%
5 years	0	0%	0	0%
6 to 11 years	40	37%	110	53%
12 to 17 years	50	46%	84	40%
Total	109	100%	209	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	289	90%
Spanish or Spanish Creole	33	10%
All Other Languages	0	0%
Total	322	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	20	59%
One or more parents not working	14	41%
<b>6 to 17 years:</b>		
Single working parent or both parents working	264	99%
One or more parents not working	*	*

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Point Reyes Station Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	39	38	36	35	16%
2 - 4 Years	55	53	51	49	23%
5 - 12 Years	144	141	136	131	61%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	28	27	26
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	17	16	16
At-Home/Relative Care	19	18	18
<b>5 - 12 Years</b>			
Family Licensed Care	11	11	11
Center-(After/Before School)	31	30	29
At-Home/Relative Care	99	95	92

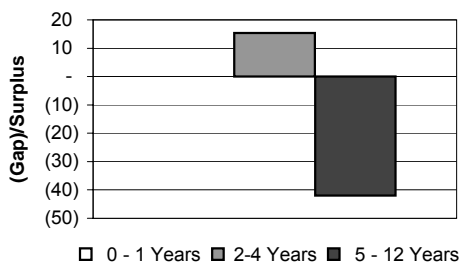
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	35	35
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	18	19
<i>Subtotal</i>	15	16
<b>5 - 12 Years</b>		
Family Licensed Care	(11)	(11)
Center-(After/Before School)	(31)	(30)
<i>Subtotal</i>	(42)	(41)
<b>Total</b>	<b>(31)</b>	<b>(29)</b>

Point Reyes Station ECE Supply, 2006 \*



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## San Anselmo Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	4%	88%	0%	2%	*	5%	100%
0 - 1 Years	16	327	*	*	0	17	367
2 - 4 Years	22	553	*	13	*	32	624
5 - 12 Years	80	1,614	*	34	*	90	1,835
13 Years +	512	12,663	137	405	60	243	14,020
Total 0-12 Years	118	2,494	13	53	*	139	2,826
Total Population	630	15,157	150	458	69	382	16,846

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	71	20%	971	27%
5 years	0	0%	160	4%
6 to 11 years	91	25%	1,317	37%
12 to 17 years	202	55%	1,127	32%
Total	364	100%	3,575	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	2,731	93%
Spanish or Spanish Creole	74	3%
German	42	1%
All Other Languages	91	3%
Total	2,938	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	607	51%
One or more parents not working	589	49%
<b>6 to 17 years:</b>		
Single working parent or both parents working	1,913	72%
One or more parents not working	735	28%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

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## San Anselmo Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	340	322	296	286	12%
2 - 4 Years	579	547	503	486	20%
5 - 12 Years	1,847	1,802	1,737	1,568	67%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	37	34	33
Center-Based	38	35	34
At-Home/Relative Care	247	227	220
<b>2-4 Years</b>			
Family Licensed Care	58	54	52
Center-Based	244	224	217
At-Home/Relative Care	245	225	217
<b>5 - 12 Years</b>			
Family Licensed Care	122	118	106
Center-(After/Before School)	325	313	283
At-Home/Relative Care	1,355	1,307	1,179

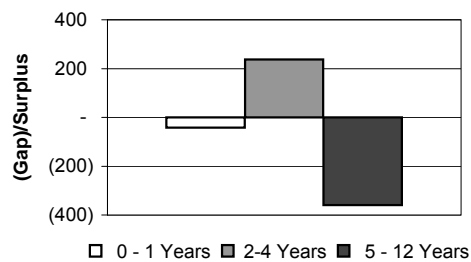
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	32	32
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	69	69
Center-Based	471	471
<b>5 - 12 Years</b>		
Family Licensed Care	13	13
Center-(After/Before School)	75	75

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(38)	(35)
<i>Subtotal</i>	(42)	(36)
<b>2-4 Years</b>		
Family Licensed Care	11	15
Center-Based	227	247
<i>Subtotal</i>	238	262
<b>5 - 12 Years</b>		
Family Licensed Care	(109)	(105)
Center-(After/Before School)	(250)	(238)
<i>Subtotal</i>	(359)	(343)
<b>Total</b>	<b>(164)</b>	<b>(117)</b>

San Anselmo ECE Supply, 2006



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## San Geronimo Profile

### Age by Race

Age Cohort	Hispanic or Latino	Non-Hispanic or Latino				Other Race (a)	Two or More Races	Total
		White	Black or African American	Asian and Pacific Islander				
Percent of All Children 0-12	*	73%	*	*	*	*	100%	
0 - 1 Years	*	*	0	0	0	0	*	
2 - 4 Years	*	*	0	0	0	0	*	
5 - 12 Years	*	40	*	*	*	*	51	
13 Years +	58	382	*	13	*	*	469	
Total 0-12 Years	*	43	*	*	*	*	59	
Total Population	66	425	*	14	*	13	528	

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	0	0%	0	0%
5 years	0	0%	0	0%
6 to 11 years	*	*	35	61%
12 to 17 years	*	*	22	39%
Total	14	100%	57	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	71	100%
All Other Languages	0	0%
Total	71	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	0	0%
One or more parents not working	0	0%
<b>6 to 17 years:</b>		
Single working parent or both parents working	54	76%
One or more parents not working	17	24%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

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## San Geronimo Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	14	14	13	13	18%
2 - 4 Years	14	14	13	13	18%
5 - 12 Years	52	49	46	44	64%

### Child Care Demand by Age

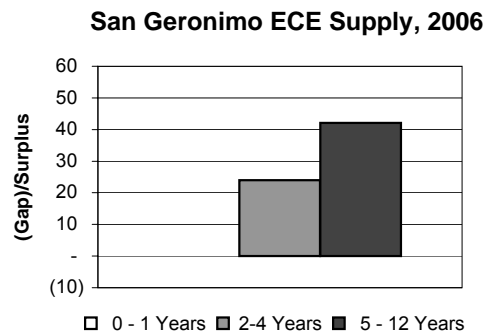
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	0	0	0
Center-Based	0	0	0
At-Home/Relative Care	0	0	0
<b>2-4 Years</b>			
Family Licensed Care	0	0	0
Center-Based	0	0	0
At-Home/Relative Care	0	0	0
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	*	*	*
At-Home/Relative Care	34	32	30

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	24	24
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	54	54

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<i>Subtotal</i>	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	24	24
<i>Subtotal</i>	24	24
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	45	46
<i>Subtotal</i>	42	43
<b>Total</b>	<b>66</b>	<b>67</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## San Quentin Profile

### Age by Race

Age Cohort	Hispanic or Latino	Non-Hispanic or Latino					Total
		White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	*	44%	*	0%	0%	*	100%
0 - 1 Years	0	*	0	0	0	*	*
2 - 4 Years	*	0	0	0	0	*	*
5 - 12 Years	*	*	*	0	0	*	18
13 Years +	1,319	2,272	2,524	130	142	27	6,414
Total 0-12 Years	*	11	*	0	0	*	25
Total Population	1,327	2,283	2,526	130	142	31	6,439

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	0	0%	13	54%
5 years	0	0%	0	0%
6 to 11 years	0	0%	11	46%
12 to 17 years	*	*	0	0%
Total	*	*	24	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	11	58%
Spanish or Spanish Creole	*	*
All Other Languages	0	0%
Total	19	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	13	100%
One or more parents not working	0	0%
<b>6 to 17 years:</b>		
Single working parent or both parents working	11	100%
One or more parents not working	0	0%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## San Quentin Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	*	12	14	18	17%
2 - 4 Years	14	15	19	24	23%
5 - 12 Years	36	40	48	59	60%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	11
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	*	*	*
At-Home/Relative Care	15	18	23

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>Total</b>	<b>(18)</b>	<b>(21)</b>

#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## San Rafael Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	30%	56%	3%	5%	1%	5%	100%
0 - 1 Years	605	776	39	72	*	79	1,577
2 - 4 Years	778	1,252	49	113	20	114	2,326
5 - 12 Years	1,714	3,702	193	357	52	309	6,327
13 Years +	10,835	41,593	1,087	3,362	279	1,236	58,392
<b>Total 0-12 Years</b>	<b>3,097</b>	<b>5,730</b>	<b>281</b>	<b>542</b>	<b>78</b>	<b>502</b>	<b>10,230</b>
<b>Total Population</b>	<b>13,932</b>	<b>47,323</b>	<b>1,368</b>	<b>3,904</b>	<b>357</b>	<b>1,738</b>	<b>68,622</b>

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	1,192	33%	2,644	27%
5 years	175	5%	573	6%
6 to 11 years	1,149	32%	3,528	36%
12 to 17 years	1,057	30%	3,088	31%
<b>Total</b>	<b>3,573</b>	<b>100%</b>	<b>9,833</b>	<b>100%</b>

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	6,196	64%
Spanish or Spanish Creole	2,460	25%
Vietnamese	225	2%
Chinese	160	2%
French	148	2%
All Other Languages	527	5%
<b>Total</b>	<b>9,716</b>	<b>100%</b>

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	2,436	55%
One or more parents not working	2,030	45%
<b>6 to 17 years:</b>		
Single working parent or both parents working	5,720	68%
One or more parents not working	2,706	32%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## San Rafael Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	1,853	1,731	1,564	1,348	16%
2 - 4 Years	2,733	2,554	2,307	1,988	23%
5 - 12 Years	6,469	6,723	7,123	7,192	61%

### Child Care Demand by Age

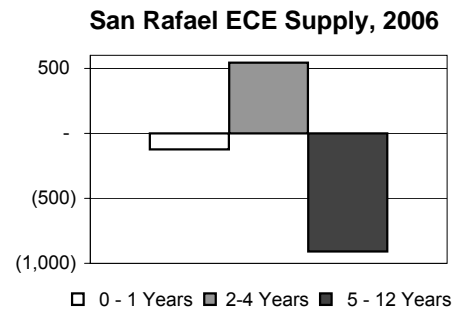
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	189	171	147
Center-Based	167	151	130
At-Home/Relative Care	1,376	1,243	1,071
<b>2-4 Years</b>			
Family Licensed Care	254	229	198
Center-Based	1,085	980	845
At-Home/Relative Care	1,215	1,097	946
<b>5 - 12 Years</b>			
Family Licensed Care	413	437	441
Center-(After/Before School)	1,160	1,229	1,241
At-Home/Relative Care	5,151	5,457	5,510

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	167	167
Center-Based	64	64
<b>2-4 Years</b>		
Family Licensed Care	363	363
Center-Based	1,520	1,520
<b>5 - 12 Years</b>		
Family Licensed Care	66	66
Center-(After/Before School)	598	598

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(22)	(*)
Center-Based	(103)	(87)
<i>Subtotal</i>	<i>(125)</i>	<i>(90)</i>
<b>2-4 Years</b>		
Family Licensed Care	109	134
Center-Based	435	540
<i>Subtotal</i>	<i>544</i>	<i>674</i>
<b>5 - 12 Years</b>		
Family Licensed Care	(347)	(371)
Center-(After/Before School)	(562)	(631)
<i>Subtotal</i>	<i>(909)</i>	<i>(1,002)</i>
<b>Total</b>	<b>(489)</b>	<b>(419)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

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## Sausalito Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	9%	46%	30%	6%	1%	7%	100%
0 - 1 Years	12	135	32	12	*	23	217
2 - 4 Years	23	114	60	14	*	22	237
5 - 12 Years	52	205	202	32	*	27	524
13 Years +	434	8,119	923	510	54	188	10,228
Total 0-12 Years	87	454	294	58	13	72	978
Total Population	521	8,573	1,217	568	67	260	11,206

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	147	30%	315	40%
5 years	47	10%	35	4%
6 to 11 years	180	37%	181	23%
12 to 17 years	108	22%	261	33%
Total	482	100%	792	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	686	83%
Spanish or Spanish Creole	48	6%
Korean	41	5%
All Other Languages	56	7%
Total	831	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	279	52%
One or more parents not working	255	48%
<b>6 to 17 years:</b>		
Single working parent or both parents working	427	63%
One or more parents not working	255	37%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Sausalito Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	408	347	271	182	24%
2 - 4 Years	446	379	296	198	26%
5 - 12 Years	609	712	899	1,022	50%

### Child Care Demand by Age

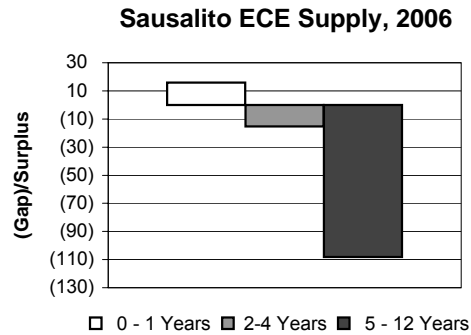
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	37	29	19
Center-Based	45	35	24
At-Home/Relative Care	265	207	139
<b>2-4 Years</b>			
Family Licensed Care	35	27	18
Center-Based	176	137	92
At-Home/Relative Care	168	131	88
<b>5 - 12 Years</b>			
Family Licensed Care	41	52	59
Center-(After/Before School)	145	183	208
At-Home/Relative Care	526	663	755

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	22	22
Center-Based	76	76
<b>2-4 Years</b>		
Family Licensed Care	47	47
Center-Based	148	148
<b>5 - 12 Years</b>		
Family Licensed Care	*	*
Center-(After/Before School)	69	69

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(15)	(*)
Center-Based	31	41
<i>Subtotal</i>	16	34
<b>2-4 Years</b>		
Family Licensed Care	12	20
Center-Based	(28)	11
<i>Subtotal</i>	(15)	31
<b>5 - 12 Years</b>		
Family Licensed Care	(32)	(43)
Center-(After/Before School)	(76)	(114)
<i>Subtotal</i>	(108)	(157)
<b>Total</b>	<b>(108)</b>	<b>(93)</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Stinson Beach Profile

### Age by Race

Age Cohort	Hispanic or Latino	Non-Hispanic or Latino					Total
		White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	*	88%	*	*	0%	*	100%
0 - 1 Years	*	13	0	0	0	0	15
2 - 4 Years	*	13	0	0	0	*	16
5 - 12 Years	*	58	*	*	0	*	65
13 Years +	21	632	*	*	*	12	676
Total 0-12 Years	*	84	*	*	0	*	96
Total Population	28	716	*	*	*	14	772

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	*	*	21	18%
5 years	*	*	*	*
6 to 11 years	14	41%	51	44%
12 to 17 years	15	44%	35	30%
Total	34	100%	115	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	131	96%
All Other Languages	*	*
Total	136	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	24	75%
One or more parents not working	*	*
<b>6 to 17 years:</b>		
Single working parent or both parents working	61	62%
One or more parents not working	37	38%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Stinson Beach Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	19	18	17	16	17%
2 - 4 Years	20	19	18	17	19%
5 - 12 Years	71	67	61	65	64%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	13	12	12
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	11	*	*
At-Home/Relative Care	51	47	50

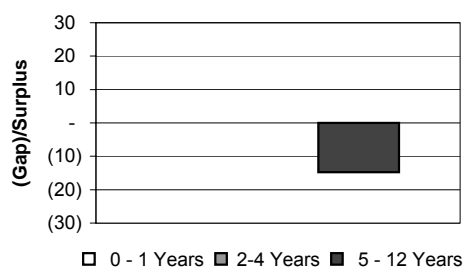
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	20	20
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	(*)	(*)
Center-Based	11	12
<i>Subtotal</i>	*	*
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(11)	(10)
<i>Subtotal</i>	(15)	(13)
<b>Total</b>	<b>(11)</b>	<b>(*)</b>

Stinson Beach ECE Supply, 2006



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Tomales Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	28%	70%	0%	0%	0%	2%	100%
0 - 1 Years	0	*	0	0	0	0	*
2 - 4 Years	*	*	0	0	0	0	16
5 - 12 Years	*	25	0	0	0	*	32
13 Years +	21	285	*	*	*	*	318
Total 0-12 Years	15	37	0	0	0	*	53
Total Population	36	322	*	*	*	*	371

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	0	0%	12	13%
5 years	0	0%	0	0%
6 to 11 years	0	0%	23	25%
12 to 17 years	0	0%	56	62%
Total	0	0%	91	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	68	86%
French	11	14%
All Other Languages	0	0%
Total	79	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	0	0%
One or more parents not working	12	100%
<b>6 to 17 years:</b>		
Single working parent or both parents working	70	89%
One or more parents not working	*	*

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Tomales Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	*	*	*	*	10%
2 - 4 Years	15	14	13	12	33%
5 - 12 Years	25	24	23	23	57%

### Child Care Demand by Age

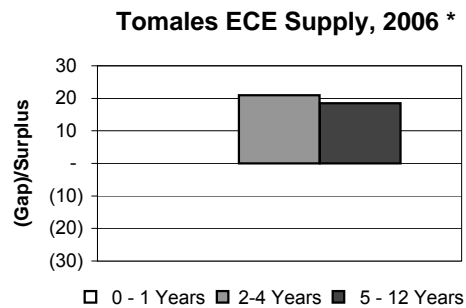
	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	0	0	0
Center-Based	0	0	0
At-Home/Relative Care	*	*	*
<b>2-4 Years</b>			
Family Licensed Care	0	0	0
Center-Based	*	*	*
At-Home/Relative Care	*	*	*
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	*	*	*
At-Home/Relative Care	14	13	13

### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	24	24
<b>5 - 12 Years</b>		
Family Licensed Care	0	0
Center-(After/Before School)	24	24

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	0	0
Center-Based	0	0
<i>Subtotal</i>	(*)	0
<b>2-4 Years</b>		
Family Licensed Care	0	0
Center-Based	21	21
<i>Subtotal</i>	21	21
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	20	20
<i>Subtotal</i>	19	19
<b>Total</b>	<b>39</b>	<b>39</b>



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Woodacre Profile

### Age by Race

Age Cohort	Non-Hispanic or Latino						Total
	Hispanic or Latino	White	Black or African American	Asian and Pacific Islander	Other Race (a)	Two or More Races	
Percent of All Children 0-12	6%	87%	*	*	*	*	100%
0 - 1 Years	*	19	0	*	0	0	22
2 - 4 Years	*	38	0	*	0	*	44
5 - 12 Years	*	128	*	*	*	*	146
13 Years +	51	1,124	*	*	12	20	1,222
Total 0-12 Years	13	185	*	*	*	*	212
Total Population	64	1,309	*	13	14	28	1,434

### Age by Poverty Status, Children 17 Years and Younger

Age Cohort	Below 200% of Poverty		Above 200% of Poverty	
	Number	Percent	Number	Percent
Under 5 years	16	18%	55	19%
5 years	23	26%	*	*
6 to 11 years	*	*	108	37%
12 to 17 years	45	51%	123	42%
Total	89	100%	290	100%

### Language Spoken at Home, Children 5 to 17 Years

Language Spoken at Home	Number	Percent
English	285	93%
Spanish or Spanish Creole	19	6%
All Other Languages	*	*
Total	308	100%

### Workforce Status by Presence of Children in Families

Workforce Status by Age Cohort	Number	Percent
<b>Under 6 years:</b>		
Single working parent or both parents working	69	70%
One or more parents not working	29	30%
<b>6 to 17 years:</b>		
Single working parent or both parents working	157	57%
One or more parents not working	117	43%

Notes: (a) Other includes the category American Indian and Alaska Native.

Sources: U.S. Census 2000 SF-1, SF-3; Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates, 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.

## Woodacre Projections and Gap Analysis

### Projections by Age

Age Cohort	2005	2007	2010	2015	Percent Children 0-12, 2007
0 - 1 Years	26	25	24	23	12%
2 - 4 Years	52	50	47	45	25%
5 - 12 Years	134	128	120	114	63%

### Child Care Demand by Age

	2007	2010	2015
<b>0 - 1 Years</b>			
Family Licensed Care	*	*	*
Center-Based	*	*	*
At-Home/Relative Care	18	17	17
<b>2-4 Years</b>			
Family Licensed Care	*	*	*
Center-Based	22	21	20
At-Home/Relative Care	21	20	19
<b>5 - 12 Years</b>			
Family Licensed Care	*	*	*
Center-(After/Before School)	19	18	17
At-Home/Relative Care	100	94	89

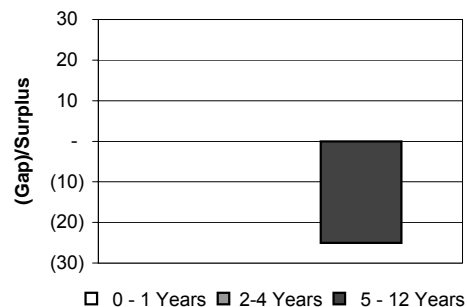
### Child Care Supply by Age (b)

	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	*	*
Center-Based	0	0
<b>2-4 Years</b>		
Family Licensed Care	*	*
Center-Based	24	24
<b>5 - 12 Years</b>		
Family Licensed Care	*	*
Center-(After/Before School)	0	0

### Child Care Gap Analysis by Age

	Surplus/(Gap)	
	2006	2010
<b>0 - 1 Years</b>		
Family Licensed Care	*	*
Center-Based	(*)	(*)
<i>Subtotal</i>	(*)	(*)
<b>2-4 Years</b>		
Family Licensed Care	*	*
Center-Based	*	*
<i>Subtotal</i>	*	*
<b>5 - 12 Years</b>		
Family Licensed Care	(*)	(*)
Center-(After/Before School)	(19)	(18)
<i>Subtotal</i>	(25)	(23)
<b>Total</b>	<b>(24)</b>	<b>(21)</b>

Woodacre ECE Supply, 2006 \*



#### Notes:

(b) Assumes supply remains constant from 2006 to 2010.

Sources: Association of Bay Area Governments Zip Code Projections 2007; U.S. Census 2000 SF-1 and SF-3; Marin Child Care Council; California Child Care Resource and Referral Network; National Survey of American Families, 2002. Model developed by Bay Area Economics, 2006 and adapted by Hatchuel Tabernik & Associates 2008.

\* Data totaling 10 or fewer are not shown for purposes of confidentiality.



APPENDIX 5

# SUBSIDIZED CHILD CARE DEMAND AND SUPPLY IN MARIN COUNTY JURISDICTIONS

**FIGURE M — NUMBER OF CHILDREN AGES 0 TO 12 WITH FAMILY INCOME IN 1999 BELOW SPECIFIED THRESHOLDS<sup>52</sup>**

ZCTA5 Code	Total	Age of Related Child												
		0	1	2	3	4	5	6	7	8	9	10	11	12
San Rafael, 94901	2,430	255	195	155	220	250	195	205	210	180	260	110	155	45
San Rafael, 94903	705	45	85	20	35	75	45	45	55	45	85	90	35	50
Greenbrae, 94904	175	0	10	20	10	10	20	15	0	25	4	25	10	30
Belvedere/Tiburon, 94920	130	10	0	10	4	4	15	0	0	15	15	10	25	25
Bolinas, 94924	55	4	0	4	4	10	0	4	4	4	10	4	4	4
Corte Madera, 94925	125	15	15	0	0	0	20	0	30	4	0	30	4	0
Fairfax, 94930	260	20	15	4	0	20	20	25	35	20	20	20	30	35
Lagunitas, 94938	30	10	0	4	0	0	0	0	4	4	0	4	4	0
Larkspur, 94939	60	20	10	4	0	0	0	0	0	15	0	10	4	0
Mill Valley, 94941	510	40	50	15	35	80	15	55	35	50	55	25	40	20
Novato, 94945	590	15	30	60	65	45	70	35	25	75	45	50	45	30
Nicasio, 94946	15	4	0	4	4	0	0	4	0	0	0	0	0	0
Novato, 94947	1,000	85	55	65	40	35	115	100	40	110	105	95	85	65
Novato, 94949	490	25	35	80	25	35	40	45	50	40	45	40	20	20
Point Reyes Station, 94956	60	0	0	0	20	0	0	10	4	10	10	0	10	4
San Anselmo, 94960	315	35	10	10	0	35	0	15	45	15	20	35	65	30
Sausalito, 94965	485	35	10	25	40	45	45	65	60	15	35	55	20	35
Stinson Beach, 94970	30	4	0	0	0	0	4	4	0	0	0	0	15	10
Woodacre, 94973	65	10	0	4	4	4	25	0	4	4	0	0	4	4
Other	220	30	15	20	30	4	10	20	10	4	25	10	35	4

Sources: Supply data is based on CalWORKS, Head Start, and California Department of Education-funded capacity. Demand analysis conducted by the US Census Bureau, 2007.

<sup>52</sup> A ZICTA is a Zip Code Tabulation Area, which is the set of census tracts that best approximates the boundaries of a Zip Code.



**FIGURE N — NUMBER OF CHILDREN AGES 0 TO 12 WITH FAMILY INCOME IN 1999 BELOW SPECIFIED THRESHOLDS AND WITH ALL PARENTS (1 OR 2) EMPLOYED<sup>53</sup>**

ZCTA5 Code	Total	Age of Related Child												
		0	1	2	3	4	5	6	7	8	9	10	11	12
San Rafael, 94901	890	80	50	65	80	70	50	110	75	70	115	35	60	30
San Rafael, 94903	395	15	40	10	30	50	15	20	30	25	45	85	20	15
Greenbrae, 94904	50	0	0	4	10	10	10	0	0	4	0	4	0	0
Belvedere/Tiburon, 94920	55	0	0	10	0	0	15	0	0	0	10	0	10	10
Bolinas, 94924	35	0	0	4	0	4	0	4	4	4	10	4	0	4
Corte Madera, 94925	60	0	0	0	0	0	10	0	25	4	0	15	4	0
Fairfax, 94930	155	0	0	0	0	20	10	15	4	20	15	20	30	20
Lagunitas, 94938	20	4	0	4	0	0	0	0	0	4	0	4	4	0
Larkspur, 94939	30	20	0	4	0	0	0	0	0	0	0	0	4	0
Mill Valley, 94941	185	4	15	0	15	25	0	25	15	0	35	20	15	15
Novato, 94945	340	4	20	15	25	20	35	25	4	55	25	40	45	20
Nicasio, 94946	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Novato, 94947	470	45	20	40	25	10	60	40	20	70	40	50	10	35
Novato, 94949	250	15	20	20	25	20	20	20	20	15	35	15	15	10
Point Reyes Station, 94956	55	0	0	0	20	0	0	10	0	10	10	0	10	0
San Anselmo, 94960	225	15	0	4	0	15	0	15	40	10	15	35	55	25
Sausalito, 94965	315	15	10	10	20	35	45	55	35	15	20	30	20	15
Stinson Beach, 94970	25	4	0	0	0	0	4	4	0	0	0	0	10	4
Woodacre, 94973	55	10	0	4	4	4	20	0	4	4	0	0	0	4
Other	110	20	10	10	4	4	4	10	4	0	4	10	20	4

Sources: Supply data is based on CalWORKS, Head Start, and California Department of Education-funded capacity. Demand analysis conducted by the US Census Bureau, 2007.

<sup>53</sup> A ZICTA is a Zip Code Tabulation Area, which is the set of census tracts that best approximates the boundaries of a Zip Code.



**FIGURE O — SUPPLY OF SUBSIDIZED CHILD CARE SLOTS IN MARIN COUNTY, 2007**

Area/Zip Code	Infant	Preschool	School-Age	Total
Belvedere/Tiburon – 94920	3	3	7	13
Bolinas – 94924	0	3	0	3
Corte Madera – 94925	7	15	4	26
Greenbrae – 94904	1	13	7	21
Fairfax – 94930, 94978	8	28	33	69
Forest Knolls – 94933	0	1	1	2
Inverness – 94937	0	0	0	0
Lagunitas – 94938	0	1	0	1
Larkspur – 94939	2	4	0	6
Mill Valley – 94941, 94942	10	14	14	38
Novato – 94945, 94947, 94948, 94949	93	374	205	672
Point Reyes Station – 94956	1	12	1	14
San Anselmo – 94960	6	14	12	32
San Geronimo – 94963	1	0	0	1
San Rafael – 94901, 94903, 94912, 94915	112	435	187	734
Sausalito – 94965, 94966	25	99	48	172
Stinson Beach – 94970	0	0	0	0
Woodacre – 94973	0	1	0	1
San Quentin 94964	0	2	0	2
Nicasio 94946	1	2	0	3
Other	0	2	1	3
<b>Total</b>	<b>270</b>	<b>1,023</b>	<b>520</b>	<b>1,813</b>

Sources: CalWORKS, Head Start, and California Department of Education-funded capacity.



## APPENDIX 6

# KEY COMPONENTS TO QUALITY EARLY CARE AND EDUCATION

The Quality Committee of the Marin Child Care Commission created a definition of quality early care and education as required by the *Marin County Child Care Master Plan 2002-2007*. The Child Care Commission approved this definition in summer 2007.

### **Purpose:**

The purpose of this initial definition is to provide “key components” of quality care. They will serve as the conceptual framework upon which future Commission work of developing or advocating for quality early care and education can be based. These elements are not yet sufficiently detailed to be considered formal measures or assessment of quality care, but – instead – provide the basis upon which such measures can be considered and adopted.

### **Key Components to Quality Early Care and Education:**

- Promote positive, reciprocal relationships for all children and adults. Adult/child ratios should not exceed National Association for the Education of Young Children (NAEYC) recommendations.<sup>54</sup>
- Have curriculum that is play-based and intentionally planned to promote learning goals that include all developmental areas (cognitive, social emotional, language, physical) and that are specific to children’s individual development and emergent ideas and interests.
- Use teaching approaches that are developmentally, culturally, and linguistically appropriate and that support the group and individual children’s needs and learning styles
- Regularly assess each child’s development observable during a child’s natural participation. Make program adjustments based on assessment information.
- Promote education practices that support the nutrition and health of children and staff.
- Employ a well educated, diverse, and trained workforce that reflects the language and the culture of the families served. Support the workforce with adequate compensation, supervision and professional development opportunities.<sup>55</sup>

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<sup>54</sup> See [http://www.naeyc.org/academy/criteria/teacher\\_child\\_ratios.html](http://www.naeyc.org/academy/criteria/teacher_child_ratios.html)

<sup>55</sup> A long term goal is to meet NAEYC and National Institute for Early Education Research (NIEER) recommendations that teachers have, at a minimum, a Bachelors degree and specific training in early childhood education.



- Establish and maintain collaborative relationships with families.
- Establish and maintain relationships with, and use, the resources of the families' communities, such as health, social services, education and recreation to promote children optimal development.
- Provide a safe, healthful and well-equipped physical environment
- Implement strong management policies and practices to ensure successful delivery of early childhood education services.

**Resources:**

The group relied primarily on (1) *High-Quality Preschool: Why We Need It and What it Looks Like* by Linda M Espinosa, Issue 1/November 2002, National Institute of Early Education Research and (2) NAEYC's Program Standards (10 standards that define excellent programs and reflect NAEYC's Accreditation system), <http://www.naeyc.org/academy/standards/>.



## APPENDIX 7

# DATA COLLECTION PROCESS

Hatchuel Tabernik & Associates (HTA), the consulting firm for the Master Plan, began collecting data to determine the status of indicators of Marin County's child care system, as identified in the 2002-2007 Master Plan. A good amount of data was available from existing reports, and the remainder was collected from either primary or secondary sources. Secondary data sources included the California Child Care Resource and Referral Network, Marin Child Care Council, National Association of Home Builders, Orion Partners, the Commission on Teacher Credentialing, First 5 Alameda County and Design, Community & Environment, as well as other sources listed in *References*, Appendix 1. The consulting team also employed a new methodology for estimating child care demand data, as described in Appendix 2. The new model, developed by Bay Area Economics, used updated 2000 Census information, Association of Bay Area Governments and Department of Finance data, and the National Survey of American Families and National Household Education Survey. Supply data for this methodology was gathered from the Child Care Resource and Referral Network.

Several indicators necessitated primary data collection in order to assess progress, especially those related to examining child care quality in ways that had not been done previously. Therefore, HTA and the Master Plan Committee developed a survey of licensed providers focusing on components of quality care. This survey (n=33) yielded valuable data, however, attaining a high response rate proved difficult, despite individual follow-up efforts with providers. Additional questions were also added to the Marin Child Care Council's provider survey, which yielded responses from 125 licensed child care center and family child care providers.

We also designed an interview protocol to gather more in-depth information on issues central to the needs assessment. Using this protocol, the Master Plan Committee gathered information from nine key community stakeholders. Respondents included school principals, a program director of a community-based organization, a coordinator of a countywide child care program, family advocates, a school readiness coordinator, and a public health nurse.

We held two community forums and a presentation to the Child Care Commission at key points in the Master Plan development process. These events served as opportunities to synthesize and present significant portions of data from the needs assessment. The consultants presented findings by indicator area and sought feedback from attendees which was incorporated into ongoing work with the needs assessment and planning retreat.

The final step was a day-long, facilitated Master Plan Retreat which allowed Commission members and other key child care stakeholders to discuss, develop, and approve the goals, objectives, and strategies included in this report.

The Master Plan Committee worked to gather additional feedback on those goals, objectives, and strategies after the retreat and to finalize the new Master Plan.

