

FIRST 5



**ALAMEDA
COUNTY**



**ALAMEDA COUNTY
EARLY CARE AND
EDUCATION LICENSED
FACILITIES ASSESSMENT**

FALL 2022

INTRODUCTION AND ACKNOWLEDGEMENTS

Acknowledgements

First 5 Alameda would like to acknowledge all the individuals and agencies who made this report possible. We are grateful to the many child care providers who shared aspects of their experiences and built environment. Special thanks to the local child care Resource and Referral agencies who engaged licensed child care facilities in the distribution of the survey that informed this report. We would also like to express our thanks to members of the Alameda County Early Care and Education Program Facilities Ad Hoc Subcommittee who shared their invaluable input, perspective, and observations throughout the development of the report, including the provider survey and engagement, analysis, and interpretation of findings as well as recommendations. This report builds upon the analysis undertaken by Brion Economics on behalf of San Mateo County, and the many analyses produced on the subject of child care facilities in the past by the Alameda County Early Care and Education Program.

About this Report

Assets matter. Across history, place, and issue areas, assets have proven their role as a determining factor for who has access to resources, capital, power, and opportunity. The role of assets -specifically land, built environment, and capital- cannot be overstated in our current economic and political system. This holds true in the lives of children 0-5 and their families, as well as those who have made a profession of the care and education of young children. First 5 Alameda's Kindergarten Readiness Assessment has consistently found that the strongest predictors of kindergarten readiness are structural conditions, socioeconomics, and access to resources- which are all driven by persistent structural race and class bigotries.

With cautious optimism and anticipation of potential new state, federal, and local facilities funding opportunities, First 5 Alameda developed the 2022 Alameda County Early Care and Education Licensed Facilities Needs Assessment. The goal of this report is to take a facilities-focused lens on the Alameda County ECE landscape:

- to understand the current conditions of facilities in the Alameda County ECE landscape, and how need and infrastructure vary by place, population, care type,
- to understand the role of facilities in the Alameda County ECE system,
- to address new facilities gaps in licensed care for 0-5 year olds due to the impact of the pandemic,
- to identify areas of opportunity for investment in ECE facilities as one part of a holistic support strategy for the field,
- to inform advocacy and strategies to respond to the gaps in licensed care and facilities needs, and finally,
- to position the local ECE field to take advantage of new and existing funding options, (federal/state and local).



This report was developed with support and engagement from the Alameda County Early Care and Education Planning Council, who convened an Ad Hoc Committee on Facilities in the Winter and Spring of 2022 with the goal of convening a community partnership to advise First 5 Alameda in the development of the survey instrument, conducting the survey, and shaping this report and recommendations. The survey responses reflect 324 individual licensed child care sites that serve 6,167 children in Alameda County.

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Why Now

In 2020, the ECE field's operating context changed dramatically. The COVID-19 pandemic decimated an already fragile, underfunded, and fragmented "system" of licensed care. The vital links between families and their local economic, health, and social supports were severely challenged. Families experienced historic levels of job loss, child care and school closures, health care challenges, and food and housing insecurity. Between March 2020 and January 2021, an estimated 153 (7%) of licensed child care facilities in Alameda County closed permanently. Social distancing, remote learning, and quarantine policies compounded the isolation and stress endured by low- to moderate-income families and caregivers. The lack of access to in-person learning, play, and interaction negatively impacted children's learning, growth, and development. The pandemic exacerbated persistent health and economic inequities that disproportionately impacted Black and Brown communities, creating increased risks for family's economic security, emotional well-being, educational progress, health, and safety.

Alameda County's ECE system, like many across the country, was on perilous footing before the COVID-19 pandemic began. First 5 Alameda estimates that the Alameda County ECE field lost \$395 million in fiscal year 2020–2021 alone. More than two years into the pandemic, the ECE system, infrastructure, and workforce remains under-resourced, with many providers closed or teetering on the brink of closure. ECE providers face significant challenges to providing quality, equitable access, and affordable care.

It is evident that President Biden's proposals in support of families with young children, and Governor Newsom's investments in early childhood are informed by the growing recognition of both the conditions necessary to support family and child well-being, as well as the need for public policy to address the increasing inequality. The COVID-19 pandemic, which has destabilized the private and public sector, has also exponentially increased community and family needs, and further highlighted government's unique and necessary role in meeting the moment in hopes of a better future.

This is a moment to invest in a better future through long-term, systemic solutions for children and families.

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KEY FINDINGS AND RECOMMENDATIONS

Equity is embedded as a consideration across each of the individual findings and recommendations outlined in this report. Inequities observed and experienced in the landscape conditions, systems, and supports for ECE licensed facilities impact the health and well-being of children, providers, and families. This report recommends programs and policies for ECE licensed facilities that address structural racism and economic inequity, that ensure basic facilities needs are met, that increase access to quality support and technical assistance services, and that consider the role of place in the fostering of economically stable communities and opportunities for connection. **Across all findings and recommendations, this report recommends prioritizing investments with an equity lens and with an eye toward mediating and ameliorating persistent inequities.**

“Las proveedoras necesitamos apollo. – We the providers need support.”

- Family child care operating in Hayward for 8 years

Key Findings and Recommendations	
Landscape Conditions	
Key Findings	Recommendations
<p>Supply for Child Care is Low in Alameda County Relative to Demand</p> <ul style="list-style-type: none"> Licensed care facilities face a wide range of conditions in the ECE landscape including dramatic differences in supply and demand and facilities costs, but most parts of the county remain a child care desert, particularly for infant/toddler age care. 85% of infants and toddlers in working families do not have access to a licensed space. Licensed child care declined at differing rates across the county during the pandemic, with family child care sites closing at a dramatically higher rate than centers. The cities of Fremont and Oakland, as well as the unincorporated communities of the county saw the most site closures. 	<p>Define the goal Define a community-led vision and set clear short and long term goals for the landscape and conditions of ECE facilities in Alameda County. Name the amount and types of facilities needed and measure progress toward meeting that goal.</p>

<p>There is significant need for investment and interest in expansion in ECE licensed facilities in Alameda County.</p> <ul style="list-style-type: none"> Internal analysis conducted by First 5 Alameda in Spring 2022¹ suggests that the facilities cost to build enough supply to meet demand for licensed child care in Alameda County is likely in the range of \$2 billion to \$4 billion. 	<p>Maximize Available Resources</p> <p>Explore strategies to leverage capital investments including fund development, land trusts, first right to purchase policies. Explore relationships with banks, community funds, and credit unions that deepen and broaden the field’s access to property and capital.</p> <p>Leverage and layer with existing or new state, federal, and private opportunities for ECE facilities funding. Examples of opportunities to leverage include:</p> <ul style="list-style-type: none"> California Department of Social Services Minor and Major Renovation and Repair Program, state and federal supports for first time homebuyers, state and federal supports to nonprofits and small businesses including COVID-19 emergency response supports. Community Development funding for renovation and repair for community space Playground grants, such as KABOOM and other grantmakers Philanthropic capital grants
<p>Most Sites are Experiencing Some Deferred Maintenance</p> <ul style="list-style-type: none"> Facility conditions vary widely across the county, with significant differences by place, facility type, age of children served, and property component. Most sites report only “adequate” conditions of their site components (landscape, HVAC, outdoor area, kitchen, etc), but some property components were reported at over 30% inadequate, substandard, or worse. 61% of sites reported at least one of their property components are inadequate, substandard, or worse, while 29% of sites reported that six or more of their property components are inadequate, substandard, or worse. 	<p>Prioritize Investments</p> <p>Prioritize investments with an equity lens and with an eye toward mediating and ameliorating persistent inequities, for example:</p> <ul style="list-style-type: none"> Focus resources on child care deserts, communities of color, women owned businesses, sites that serve infants and toddlers, facilities needs to address inclusionary practices. Balance renovation and repair with preventative maintenance. Deferred maintenance is not distributed equitably across licensed child care facilities in Alameda County, a reflection of historic and persistent inequities by race, class, and place. include consideration of license exempt care facilities including family, friend, and neighbor care program settings, Family Resource Centers, drop-in child care, license-exempt onsite child care in shelters or homeless supportive housing, and playgroup settings.

<p>Property owners and renters experience different challenges in the ECE operating landscape</p> <ul style="list-style-type: none"> • 67% of sites own their property, with notable differences by facility type and tenure. • Particularly with FCCs, tenure at a site and ownership of the site are tightly correlated, which may point to promotion of site ownership as a strategy to retain existing or new slots. • Providers who lease or use sites that were donated to them articulated concerns about their stability amid condition changes in the rental market. 	<p>Take an Asset Building Approach Balance renovation, repair, expansion, and new construction acknowledging the role that property ownership or lease status plays in financial security.</p> <p>Adopt a spectrum of asset building strategies targeted to the long-term financial well-being of the ECE community. Strategies could include financial and small business education, bank or credit union accounts, tax credits and tax filing assistance, insurance pooling, supports to access federal and state benefits, and access to low-interest loans. Include child care in new housing development, particularly for mixed use, mixed income, to secure centers and family child care and meet community needs where there is planned growth for increased housing.</p>
<p>Systems Change</p>	
<p><i>Key Findings</i></p>	<p><i>Recommendations</i></p>
<p>The current ECE facilities landscape is experiencing and perpetuating persistent inequities</p> <ul style="list-style-type: none"> • Sites with existing access to capital, property ownership, and financial knowledge are able to leverage those resources to grow, expand, weather economic shocks, and pursue continuous quality improvement. Meanwhile, sites with a historic and continued disconnection from such resources struggle even to “get to the starting line.” 	<p>Advocate for Systems Change Pair facilities investments with systems change advocacy to ensure that the investments result in lasting outcome improvements.</p> <p>Advocate to deepen investment in ECE as a public good and supporting strategies such as child care rate reform, valuing paid and unpaid labor that is traditional performed by women, paid family leave, tax reform, housing justice and city planning.</p>
<p>Stakeholders are Disconnected</p> <ul style="list-style-type: none"> • Sites feel overwhelmed and frustrated navigating and negotiating a landscape full of stakeholders who are often unprepared to collaborate. <ul style="list-style-type: none"> ○ For example, guidance from a city permit office may differ from that of the Fire Marshall, but projects need approval from both. Meanwhile, often neither the city permit office nor Fire Marshall have familiarity with the needs of a high quality or licensable ECE environment. 	<p>Partner and Coordinate Across Systems Stakeholders like city planning departments, financing institutions, housing developers, architecture firms, etc. should be resourced with attention, materials, and supports that prepare them to collaborate and partner with the ECE field. In the event that new revenue for facilities becomes available, explore the role that an experienced fiscal intermediary could play in bringing expertise and technical assistance to the field as a benefit to a diverse community of stakeholders.</p>

Engagement and Support

<i>Key Findings</i>	<i>Recommendations</i>
<p>Sites need help to get to the “starting line”</p> <ul style="list-style-type: none"> Sites articulated a need for deep and consistent technical assistance and support in facilities project management, access to capital, and project planning in order to renovate, repair, expand, or build new ECE facilities. Sites expressed a need for support and assistance with identifying quality contractors, with project management, with navigating the construction process, with accessing financing. 	<p>Deepen Technical Assistance and support Provide technical assistance and support to sites before, during, and after facilities development projects at the individual site level to ensure that all providers have an equal opportunity to meet their facilities goals. Specialized and targeted supports could include:</p> <ul style="list-style-type: none"> Technical assistance and training on maintaining a building assistance in accessing capital, assistance in working with contractors, support for project management for major projects access to lease brokers and/or real estate agents specializing in identifying and securing licensable sites, access to a pool of qualified architects knowledgeable about designing quality ECE spaces assistance with navigating local permitting processes.
<p>Community Care Licensing (CCLD) is a major factor across facilities focus areas</p> <ul style="list-style-type: none"> Challenges and opportunities with the CA Department of Social Services Community Care Licensing Division comes up across almost all domains of the assessment and is a persistent issue across the ECE field beyond the scope of the Facilities Needs Assessment. Working with licensing during the expansion process was the top concern for FCCs and a top priority for centers. 	<p>Deepen Partnership with CDSS Community Care Licensing Division Deepen partnership with CCLD to support expansion and renovation of ECE facilities in Alameda County. When identifying areas of priority for investment, prioritize health and safety issues with licensing as a minimum standard for licensed sites.</p>
<p>Sites are interested in expanding</p> <ul style="list-style-type: none"> 56% of survey respondents reported interest in expanding their site if resources were available, but different types of sites observed different potential barriers to expansion and expressed differing needs for support to expand: <ul style="list-style-type: none"> For example, training on “how to do a successful capital campaign” was the top ranked need for centers interested in expanding, but ranked toward the bottom of training needs expressed by family child care. 	<p>Emphasize Community Engagement Include community engagement as core to the planning and implementation process. Leverage existing community engagement spaces, forums, and materials, while also making space for new venues for community engagement related to ECE facilities as appropriate.</p>

ECE LANDSCAPE AND CONTEXT

ECE is a cornerstone of the early childhood system. ECE enables parents to work outside the home and is a vital part of the local economy. It is an under-resourced and underappreciated profession.

Participation in ECE is a leading factor in predicting kindergarten readiness, as research has shown that participation in ECE significantly narrowed readiness gaps.ⁱⁱ First 5 Alameda County's biannual Kindergarten Readiness studies have consistently found less than half of children in Alameda County are fully ready for kindergarten, largely due to socioeconomics tied to structural racism, with particular consequences for African American and Latinx children.

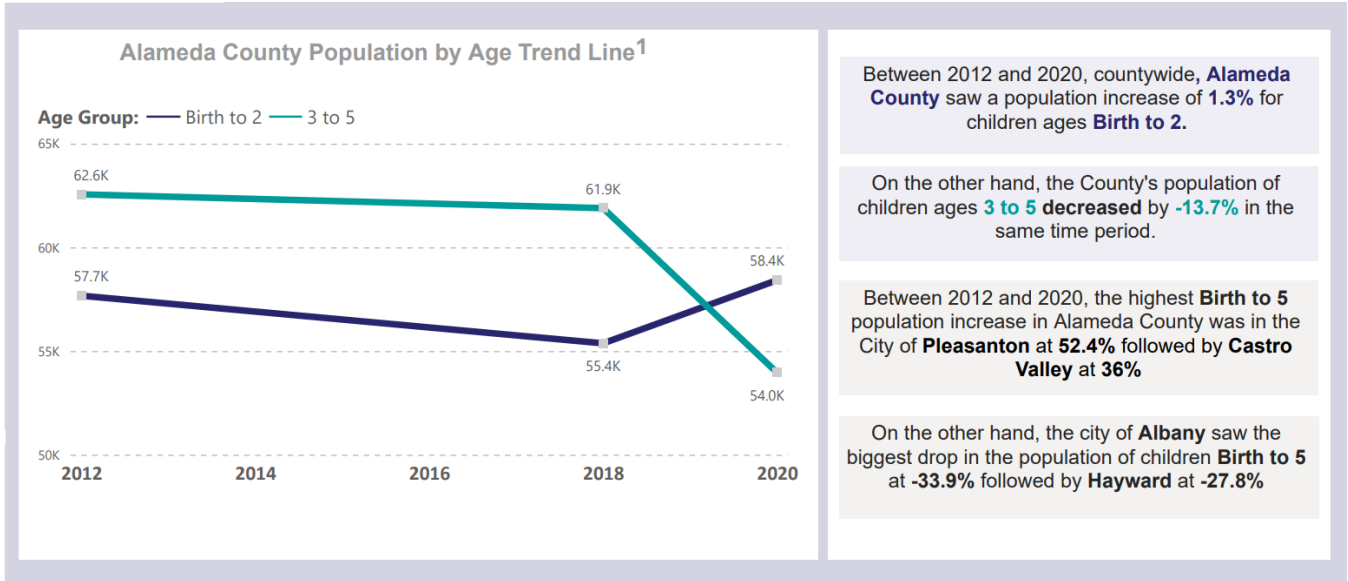
Affordability is a major barrier to accessing ECE. The cost of child care has risen 68% since 2014; a family of four in Alameda County with a preschooler and an infant pay one-third of their income toward child care costs.ⁱⁱⁱ At the same time, there is a significant gap in access to subsidies for income-eligible families with an unmet need in 2018 of 91% of eligible infants and 46% of eligible preschool children in Alameda County.^{iv} The pandemic worsened existing inequities, with families facing historic levels of job loss, school and child care closures, and food insecurity.



ECE professionals are an underpaid and aging workforce, with high attrition rates. Eighty-seven (87%) of Alameda County ECE professionals, 79% of whom identify as Black, Indigenous, or other women of color, are considered very low-income for the county.^v Across the county, the number of licensed family child care providers declined by 34% between 2007 and 2019.^{vi} These operational challenges increased in the pandemic. From 2019 to 2021 270 family child care homes closed in Alameda County. First 5 Alameda County estimates that the Alameda County ECE field lost \$395 million in FY2020-21 alone (\$220 million without taking into consideration the increased cost of providing care) and these losses are expected to continue in the current fiscal year.^{vii}

High-quality ECE, licensed and community-based childhood development programming are key components of the early childhood system of care. First 5 Alameda County's (First 5) Quality ECE (QECE) strategy provides quality improvement supports for the mixed delivery system—centers, family child care (FCC) providers, and family friend and neighbor (FFN) providers—with coaching, training, professional development, technical assistance, and financial incentives and supports that include learning networks for each type of child care delivery setting, ensuring technical support, and fostering leadership and community. First 5 promotes inclusive practices in classrooms and built environment to meet the requirements of children with special needs, so that all early learners are positioned for success.

LICENSED CHILD CARE LANDSCAPE ANALYSIS

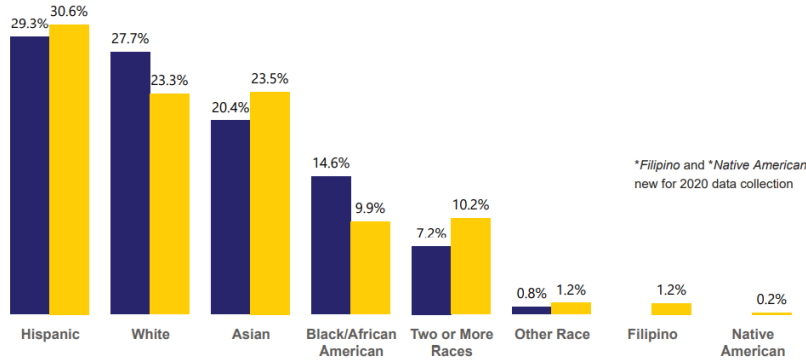


Source: (1) 2012, 2018 & 2020 American Institutes for Research Early Learning Needs Assessment Tool (ELNAT).



Changing Racial Demographics of Children Birth to 5 Over Time (2006 - 2020)²

Year ● 2006 ● 2020



Between 2006 and 2020, the county saw a decrease in children birth to 5 that identify as **Black/African American (-4.7%)** and **White (-4.4%)**. In the same time period, the county saw an increase in the number of children birth to 5 that identify as **Asian (3.1%)** and **Two or More Races (3%)**.

2018 English Language Learners Preschool Snapshot³

30%

of the county's preschoolers are considered English Language Learners.

18,294

number of preschoolers considered English Language Learners.

The City of Oakland has the highest number of preschoolers (6,051) in the County that identify as English Language Learners followed by Fremont (2,893) then Hayward (2,696)

Note: English Language Learner (ELL) is a California Department of Education (CDE) term that does not exactly match our Alameda County focus on Dual Language Learners. ELL is used here as that is how CDE collects and reports the data.

Change in County's Median Income (2010-2018)⁴



Countywide between 2010 and 2018, Alameda County 's median income increased by **33.4 %**

The City of Emeryville's median income increase of **64.6%** was the highest compared to the other cities in the county. The City of San Leandro had the lowest increase in median income at **13%**.

Number of Children Birth to 12 in Families Receiving CalWORKs Public Assistance (2018)⁵ **11,699**

Number of Children Birth to 5 living below the 2020 Federal Poverty Line - FPL (\$21,960)⁶



Number of Children under 85% of the 2020 State Median Income (\$78,135)⁶



Learn more about Federal Poverty Line (FPL) and State Median Income (SMI) on the sources page.

Source: (2) 2018 & 2020 American Institutes for Research Early Learning Needs Assessment Tool (ELNAT). 2006 Alameda County City Profiles. Note: Race/ethnicity categories are defined in a variety of ways depending upon the entity collecting the data. Categories are reported according to source categorization.

(3) 2018 ELNAT. Note: City data is calculated by combining proportional data from relevant zip codes. English Language Learner (ELL) is a California Department of Education (CDE) term that does not exactly match our Alameda County focus on Dual Language Learners. ELL is used here as that is how CDE collects and reports the data.

(4) 2010-2018 Healthy Alameda County / American Community Survey (5-year estimates)

(5) October 2019, Alameda County Social Services Agency.

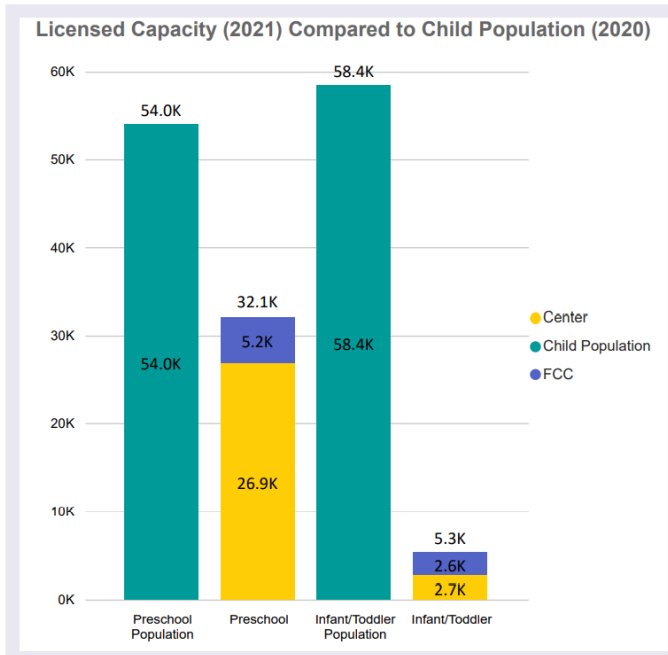
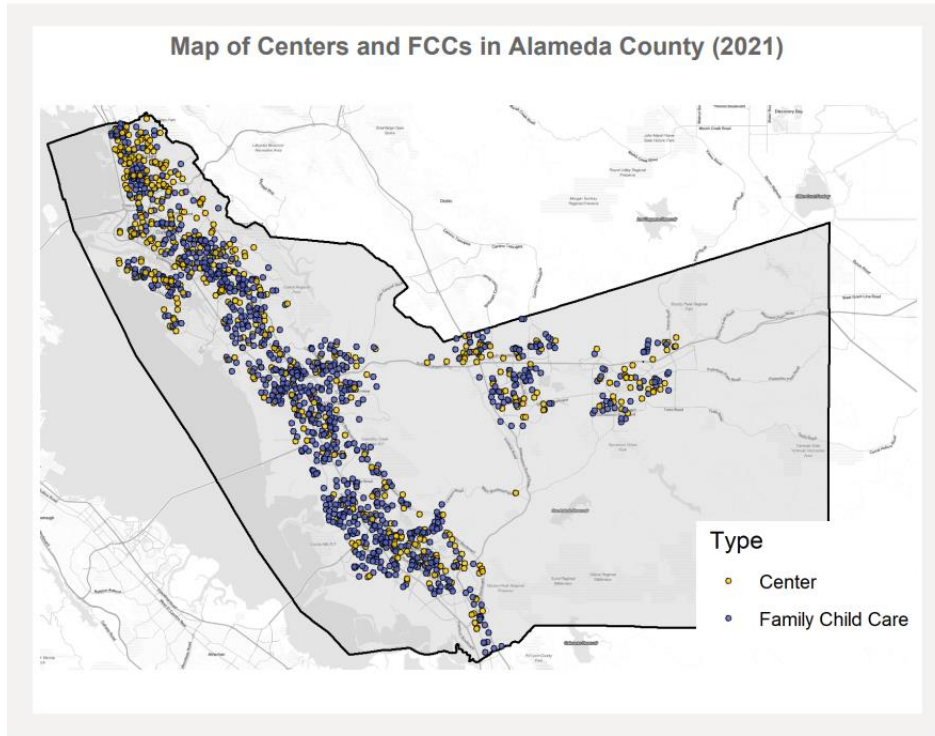
(6) 2020 ELNAT. [Federal Poverty Level \(FPL\)](#), [State Median Income \(SMI\)](#).

“Child care providers are essential to the foundation of early learning. We want to be equipped with the tools needed to support kids and families especially during these special times.”

- Family child care operating in Oakland for 3 years



Supply and Demand



Change in Licensed Capacity

From 2019 to 2021, licensed **center** capacity for children birth to age 5 has changed by **9.2%**. Since 2006, licensed center capacity for children birth to age 5 has changed by **3.7%**.

From 2019 to 2021, licensed **family child care** capacity for children birth to age 5 has changed by **-22.6%**. Since 2006, licensed family child care capacity for children birth to age 5 has changed by **-42.3%**.

Source: 2019 and 2021 CA R&R Resource and Referral Network, BANANAS, 4Cs of Alameda County, and Hively Alameda County Child Care Site data. Child population data from the 2020 ELNAT.

Infant/Toddler

The table below outlines one approach for estimating demand for licensed **infant/toddler** child care in Alameda County based on population. Another table available in the appendix uses census data about the total number of infants/toddlers in “working families”^{viii} as a proxy for demand. First 5 Alameda recognizes that there is not currently an ideal measure of demand for licensed infant/toddler child care in the county, and that no proxy estimate of demand can offer the full picture of demand for this critical service for families.



Infant/Toddler Unmet Need for Child Population - Top Zip Codes

Region	City	Zip Code	Number of Infant/Toddlers Without a Licensed Space	Unmet Need for Infant/Toddler Population
South	Union City, Hayward	94587	2,450	93.8%
North	Oakland	94601	2,256	95.6%
South	Hayward, Ashland, Cherryland, Fairview, San Lorenzo	94541	2,242	91.1%
South	Fremont	94536	2,153	90.8%
South	Hayward	94544	2,106	91.4%
North	Alameda	94501	1,944	87.8%
East	Livermore	94550	1,931	91.2%
South	Fremont	94538	1,876	89.2%
East	Dublin	94568	1,839	88.1%
South	Castro Valley	94546	1,771	91.1%
South	San Leandro, Ashland	94578	1,542	96.9%
North	Oakland	94603	1,537	96.5%
North	Oakland, Piedmont	94611	1,394	97.1%
North	Oakland	94609	761	96.9%
South	Hayward, Sunol	94552	596	98.2%
South	Hayward, Fairview	94542	406	96.4%
North	Berkeley	94707	322	96.7%
North	Berkeley	94709	301	100.0%
North	Berkeley	94708	301	97.7%
East	Sunol	94586	45	100.0%

Source: unmet need analysis from the 2021 Alameda County R&R Child Care Site Data and 2020 American Institutes for Research Early Learning Needs Assessment Tool (ELNAT) data for the number of children by zip code. School age excluded due to the extensive use of unlicensed programs and settings. Data set includes the top 10 zip codes for number of children without a licensed space and the top 10 zip codes for percentage of children without a licensed space. Note: See Appendix for full data set for all zip codes.

“Having a yard would be nice. Especially during Covid. It is hard to avoid the park because of overcrowding or having to leave early for the same reason. Aside from the pandemic a yard would be nice but isn’t a necessity.”

- *Family child care operating in the City of Alameda for 10 years*



Preschool Age

The table below outlines one approach for estimating demand for licensed **preschool age** child care in Alameda County based on population. Another table available in the appendix uses census data about the total number of preschool age children in “working families”^{ix} as a proxy for demand.

Preschool Unmet Need for Child Population - Top Zip Codes

Region	City	Zip Code	Number of Preschoolers Without a Licensed Space	Unmet Need for Preschool Population
South	Union City, Hayward	94587	1,470	66.5%
South	Fremont	94538	1,420	56.3%
South	Fremont	94536	1,176	41.3%
East	Livermore	94550	1,128	58.5%
South	San Leandro, Ashland	94578	1,108	76.2%
South	San Leandro	94577	1,093	66.0%
North	Oakland, Piedmont	94611	1,069	72.7%
South	Hayward, Ashland, Cherryland, Fairview, San Lorenzo	94541	1,066	51.4%
North	Oakland	94603	1,046	82.7%
North	Oakland	94605	989	61.4%
North	Oakland	94621	817	67.2%
South	San Lorenzo, Ashland, Hayward	94580	664	62.5%
North	Berkeley, Oakland	94704	578	76.5%
South	San Leandro	94579	558	74.4%
South	Hayward, Sunol	94552	369	71.9%
South	Hayward, Fairview	94542	313	89.2%

Source: Unmet need analysis from the 2021 Alameda County R&R Child Care Site Data and 2020 American Institutes for Research Early Learning Needs Assessment Tool (ELNAT) data for the number of children by zip code. School age excluded due to the extensive use of unlicensed programs and settings. Data set includes the top 10 zip codes for number of children without a licensed space and the top 10 zip codes for percentage of children without a licensed space.

Note: See Appendix for full data set for all zip codes.

Change in Supply

Per the table below, licensed child care in Alameda has declined significantly in recent years, with sharp differences in the percent change in number of licensed spaces depending on the setting and age of child served.

FCCs experienced permanent site closures at a dramatically greater rate than Centers during the early years of the pandemic. This has led to a shift in the landscape of child care in Alameda County, particularly with infant and toddler care. Although historically more infants and toddlers in the county were served in FCCs than in centers, today centers are the licensed care setting that provide care to the larger share of the county’s infants and toddlers.

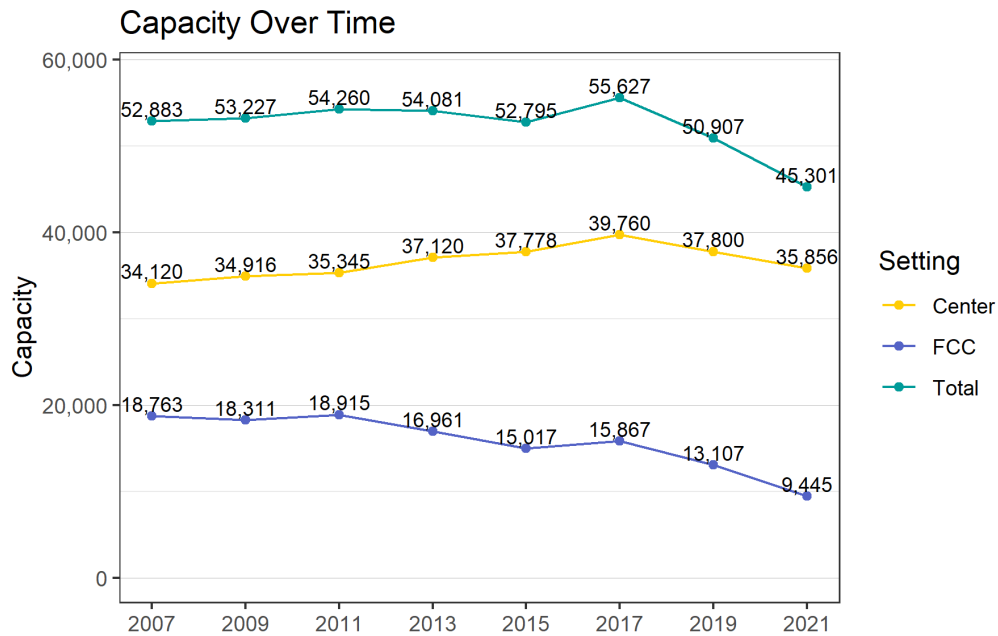
Although historically more infant and toddlers in the county were served in FCCs than in centers, today, centers are the licensed care setting that provide care to the larger share of the county’s infants and toddlers.

Change in Licensed Capacity from 2019 to 2021

Setting	Infant/Toddler				Preschool			
	2019 Supply	2021 Supply	Change in # of Spaces	% Change in # of Spaces	2019 Supply	2021 Supply	Change in # of Spaces	% Change in # of Spaces
FCC	3,399	2,553	-846	-25%	6,699	5,141	-1,558	-23%
Center	2,206	2,594	388	18%	24,856	24,257	-599	-2%
Total	5,605	5,147	-458	-8%	31,555	29,398	-2,157	-7%

Setting	Children Birth - 5				School Age			
	2019 Supply	2021 Supply	Change in # of Spaces	% Change in # of Spaces	2019 Supply	2021 Supply	Change in # of Spaces	% Change in # of Spaces
FCC	10,098	7,694	-2,404	-24%	1,517	1,751	234	15%
Center	27,062	26,851	-211	-1%	9,804	9,005	-799	-8%
Total	37,160	34,545	-2,615	-7%	11,321	10,756	-565	-5%

Source: 2019 and 2021 analysis of Alameda County licensed capacity by age and setting. Data from the R&R Network and Alameda County R&Rs (4Cs of Alameda County, BANANAS, and Hively). Note: Distribution of FCC spaces across age groups reflects an estimate based on typical distribution of spaces according to licensing ratios and provider enrollment preferences as reported to the R&Rs.

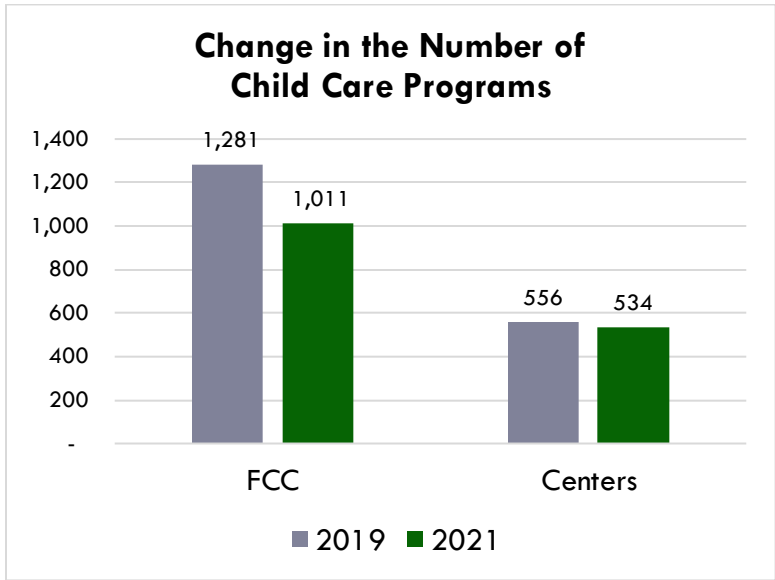


Source: 2007 to 2021 data from the R&R Network licensed capacity for all ages by setting.

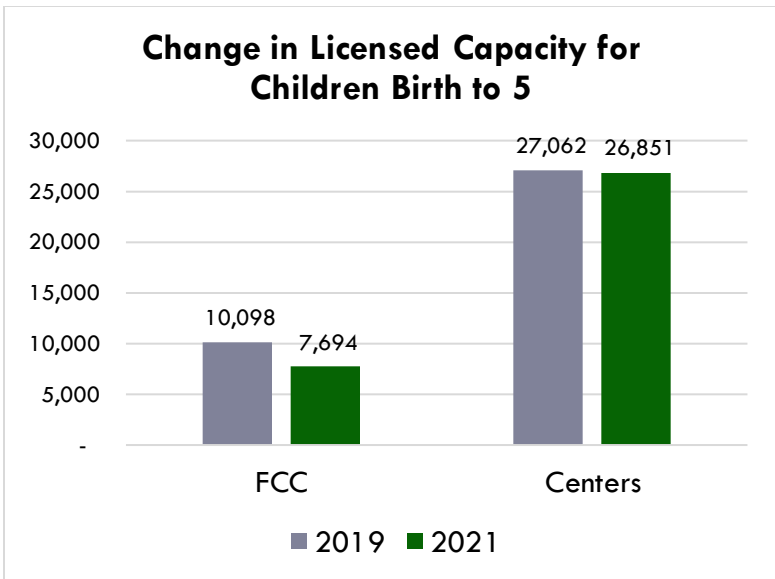
- 21% reduction in the number of FCCs, (270 FCCs)
 - 24% reduction in FCC spaces for children birth to 5 (2,404 FCC spaces for children birth to 5 lost)
- 4% reduction in the number of centers, (21 centers)
 - 1% reduction in center spaces for children birth to 5 (211 center spaces for children birth to 5 lost)
- 8% reduction in the number of infant/toddler spaces countywide (458 spaces lost)
- 7% reduction in the number of preschool spaces countywide (2,157 spaces lost)

“There is more to expansion than just expanding services – there are things that Directors need to consider when expanding. Like how expansion pulls away a director – funding also must go to supporting additional staff while and ED or Administration is tending to the building and fundraising and oversight of expansion.”

- Center based provider operating in Berkeley for 41 years



Source: 2019 and 2021 analysis of Alameda County licensed capacity by age and setting. Data from the R&R Network and Alameda County R&Rs (4Cs of Alameda County, BANANAS, and Hively).



Source: 2019 and 2021 analysis of Alameda County licensed capacity by age and setting. Data from the R&R Network and Alameda County R&Rs (4Cs of Alameda County, BANANAS, and Hively).

Change in Number of Sites by City from 2019 to 2021

City	Family Child Care		Centers		All Sites	
	Number of FCCs	Net Change from 2019 to 2021	Number of Centers	Net Change from 2019 to 2021	Number of Sites	Net Change from 2019 to 2021
Alameda	40	-5	36	3	76	-2
Albany	56	37	16	6	72	43
Ashland (94578, 94580)	16	-54	10	-7	26	-61
Berkeley	52	-15	59	-1	111	-16
Castro Valley	43	-12	19	-3	62	-15
Cherryland (94541)	58	-5	13	-3	71	-8
Dublin	42	-6	27	-2	69	-8
Emeryville	2	-2	6	1	8	-1
Fremont	166	-64	83	-8	249	-72
Hayward	136	-22	34	-6	170	-28
Livermore	44	2	35	-1	79	1
Newark	38	-7	9	-1	47	-8
Oakland	199	-86	136	-8	335	-94
Piedmont	3	-1	5	-1	8	-2
Pleasanton	47	-9	20	0	67	-9
San Leandro	58	-12	26	0	84	-12
San Lorenzo	35	-4	11	-1	46	-5
Sunol	0	0	2	1	2	1
Union City	55	-17	12	1	67	-16
Alameda County	1,011	-270	535	-21	1,546	-291

Source: 2019 and 2021 analysis of Alameda County licensed capacity by setting. Data from the R&R Network and Alameda County R&Rs (4Cs of Alameda County, BANANAS, and Hively).

Change in Capacity by City and Setting from 2019 to 2021

City	Family Child Care Birth-5 Capacity		Center Birth-5 Capacity		Total Birth-5 Capacity	
	Capacity Net Change	Percent Change	Capacity Net Change	Percent Change	Capacity Net Change	Percent Change
Alameda	-29	-7.6%	236	14.3%	206	10.1%
Ashland (94578, 94580)	-32	-17.9%	25	8.9%	-7	-1.5%
Albany	-105	-21.8%	-209	-29.6%	-314	-26.4%
Berkeley	-126	-21.6%	297	9.7%	170	4.7%
Castro Valley	-101	-22.7%	-20	-2.6%	-121	-9.9%
Cherryland (94541)	-48	-9.2%	-81	-10.2%	-129	-9.8%
Dublin	-75	-19.5%	57	3.6%	-18	-0.9%
Emeryville	-14	-41.4%	-46	-8.8%	-60	-10.8%
Fremont	-541	-29.4%	-221	-4.7%	-762	-11.7%
Hayward	-170	-13.3%	-128	-6.6%	-298	-9.2%
Livermore	-69	-20.5%	-2	-0.1%	-70	-3.4%
Newark	-57	-16.9%	-40	-5.8%	-97	-9.5%
Oakland	-701	-28.8%	-442	-6.5%	-1143	-12.4%
Piedmont	-12	-35.3%	-20	-32.3%	-32	-33.3%
Pleasanton	-156	-36.7%	131	8.1%	-25	-1.2%
San Leandro	-124	-24.4%	-31	-3.4%	-155	-11.0%
San Lorenzo	-33	-12.3%	-24	-8.8%	-57	-10.5%
Sunol	0	0.0%	35	145.8%	35	145.8%
Union City	-119	-21.0%	20	4.5%	-99	-9.8%
Alameda County	-2,404	-23.8%	-211	-0.8%	-2,615	-7.0%

Source: 2019 and 2021 analysis of Alameda County licensed capacity by setting. Data from the R&R Network and Alameda County R&Rs (4Cs of Alameda County, BANANAS, and Hively).

Change in Capacity by City and Age from 2019 to 2021

City	Infant/Toddler Capacity		Preschool Capacity		School Age Capacity	
	Capacity Net Change	Percent Change	Capacity Net Change	Percent Change	Capacity Net Change	Percent Change
Alameda	31	10.4%	175	10.1%	63	17.4%
Ashland(94578, 94580)	-7	-13.9%	0	0.1%	55	11.9%
Albany	-238	-64.3%	-77	-9.4%	23	6.5%
Berkeley	131	25.9%	39	1.2%	69	29.2%
Castro Valley	-45	-20.5%	-77	-7.6%	-906	-93.3%
Cherryland (94541)	-2	-1.0%	-127	-11.7%	666	
Dublin	20	8.8%	-37	-2.1%	-90	-7.9%
Emeryville	-34	-17.7%	-26	-7.1%	-1	-100.0%
Fremont	-180	-21.8%	-582	-10.3%	-148	-6.5%
Hayward	-64	-11.4%	-234	-8.8%	-63	-14.8%
Livermore	5	1.1%	-75	-4.4%	-209	-11.0%
Newark	-28	-22.2%	-70	-7.7%	17	11.3%
Oakland	-140	-10.7%	-1,002	-12.7%	-58	-3.6%
Piedmont	-11	-61.1%	-21	-26.9%	0	0.0%
Pleasanton	-3	-1.0%	-22	-1.3%	-82	-13.6%
San Leandro	-43	-21.9%	-112	-9.2%	26	4.0%
San Lorenzo	-19	-18.1%	-39	-8.7%	18	7.0%
Sunol	0	0.0%	35	145.8%	-24	-100.0%
Union City	-37	-18.2%	-62	-7.7%	22	25.6%
Alameda County	-385	-6.9%	547	1.7%	-416	-3.7%

Source: 2019 and 2021 analysis of Alameda County licensed capacity by age. Data from the R&R Network and Alameda County R&Rs (4Cs of Alameda County, BANANAS, and Hively). Note: Distribution of FCC spaces across age groups reflects an estimate based on typical distribution of spaces according to licensing ratios and provider enrollment preferences as reported to the R&Rs.

“Expanding daycare providers license would help us to serve so many more families and provide the need services our parents and communities need. Providing upgrades to our existing homes to provide the needed care is more cost effective and allowing us to have access to funds to help our business is important. We are already under paid, and these services are the stepping stone to children’s lives. This is urgent.”

- Family child care operating in Oakland for 30 years

LICENSED FACILITY SURVEY ANALYSIS

About the Survey

First 5 Alameda partnered with the Alameda County Early Care and Education Planning Council to develop an online survey of licensed child care and early learning sites serving children in Alameda County. The survey was Administered via email in partnership with the three local resource and referral agencies (4Cs of Alameda County, BANANAS, and Hively) in February and March 2022. The survey was available in English, Spanish, and Chinese. The focus of the survey was to understand the landscape and status of licensed child care and early learning facilities, program demand and supply, providers’ interest in program expansion and to identify potential supports and opportunities for expansion of child care and early learning facilities in Alameda County.

Between February and March 2022, 324 unique sites completed the survey. In total, respondents reported current enrollments of 1,221 infant and toddler children, 4,153 preschool aged children, and 793 school aged children, for a total of 6,167 child care and early learning spaces reported.

	# Sites	# Children Enrolled
Serving Infants/Toddlers	227	1,221
Serving Preschool Age	258	4,153
Serving School Age	132	793
All Sites Reporting	324	6,167

Of those responding, significantly more respondents represented licensed family child care sites relative to licensed center based sites, with 240 respondents representing family child care (74% of the 324 sites reporting) and 84 respondents representing center based sites (26% of the 324 sites reporting).

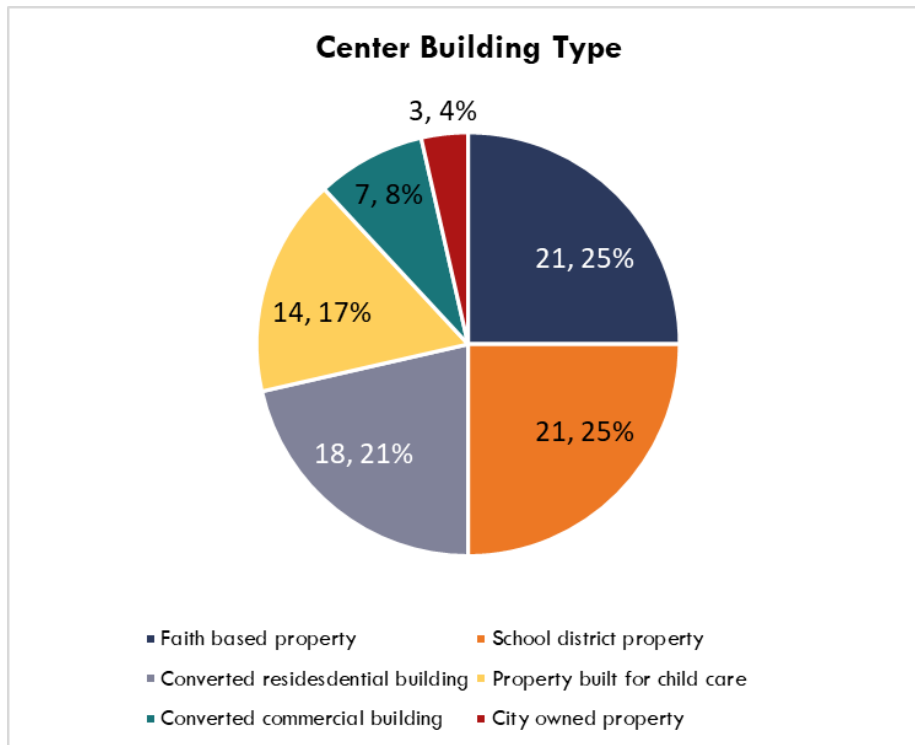
All Sites Reporting	# Sites	# Children Enrolled
Family Child Care	240	1,825
Center Based Care	84	4,342
All Sites Reporting	324	6,167

While the response rates were impressive, it is impossible to know if those that did not respond are facing significantly different conditions than respondents. Timing of administration of the survey posed a challenge: the survey was administered during February and March 2022 as the county was facing an active COVID-19 surge that demanded the attention of ECE sites.



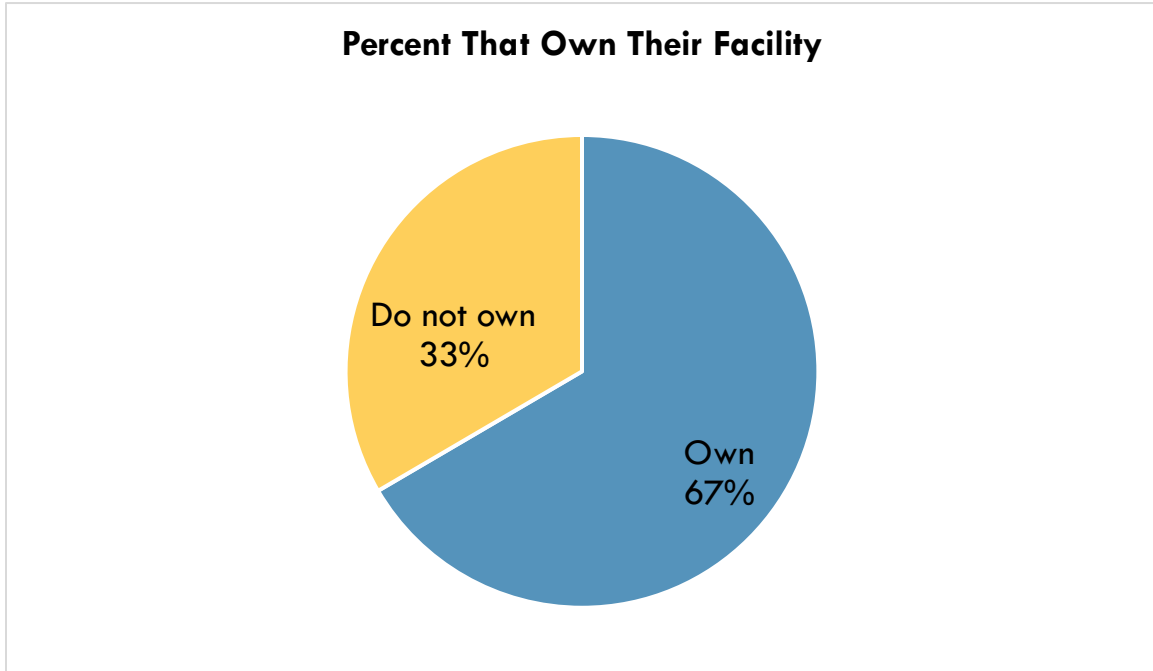
Site Tenure and Building Types

Of those responding, the average number of years of operation in the current site was 15 years, with responses ranging from 1 year to 84 years for center-based care and 1 month to 40 years for family child care. Of those that do not own their facility, the average tenure at that location was 10.6 years, with a range from 1 month to 84 years.

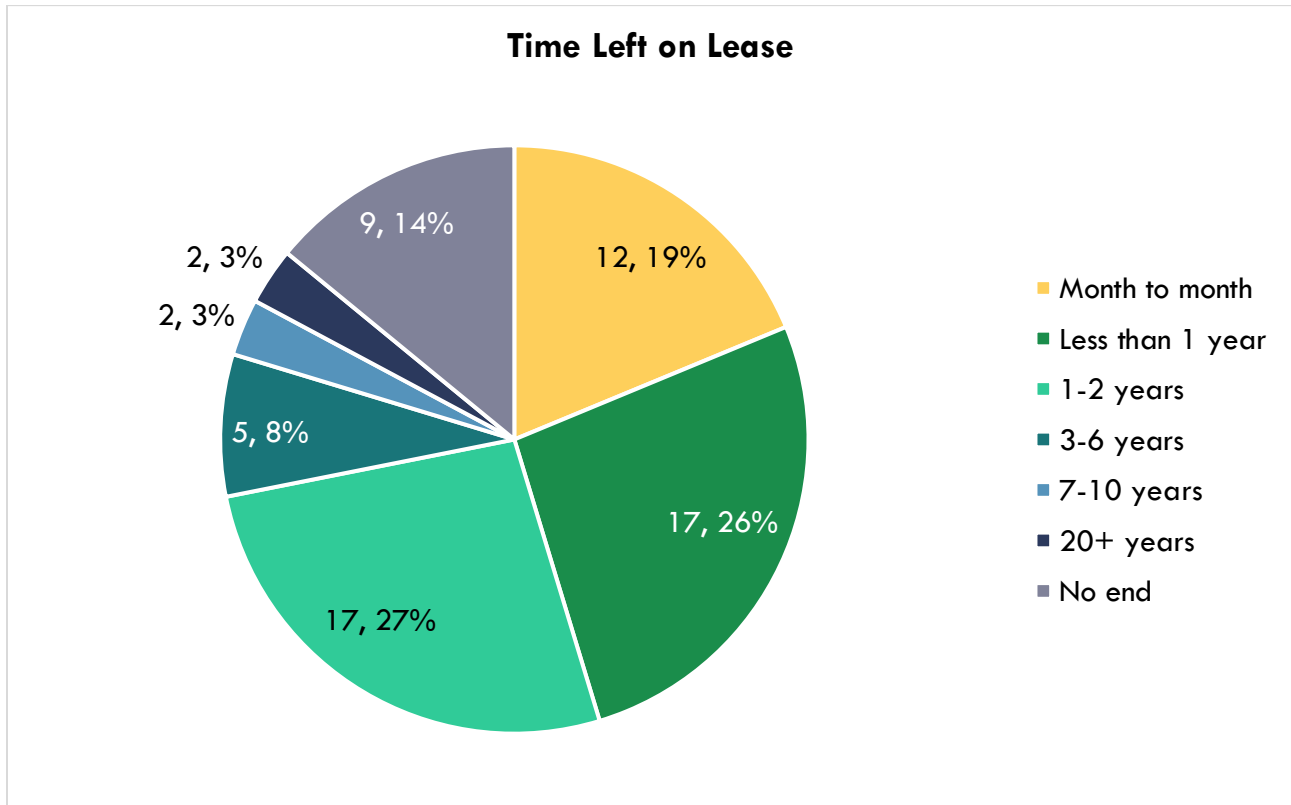


Site Ownership and Lease Conditions

Approximately two out of every three sites reported that they own the building where their child care site is located. 67% (217 of the 324 sites responding) own their building. 62% of center-based sites own their building, compared to 68% of family child care sites. Family child care sites who own their property were two years older on average than those who do not own their property.



Leased Sites



“Not sure whether the owner can continue renewing my lease for many years. The price for selling her house is more worthy than renting to me.”

- Family child care operating in Albany for 8 years

The survey section on leased sites included an open-ended question: “Do you anticipate problems renewing your lease?”

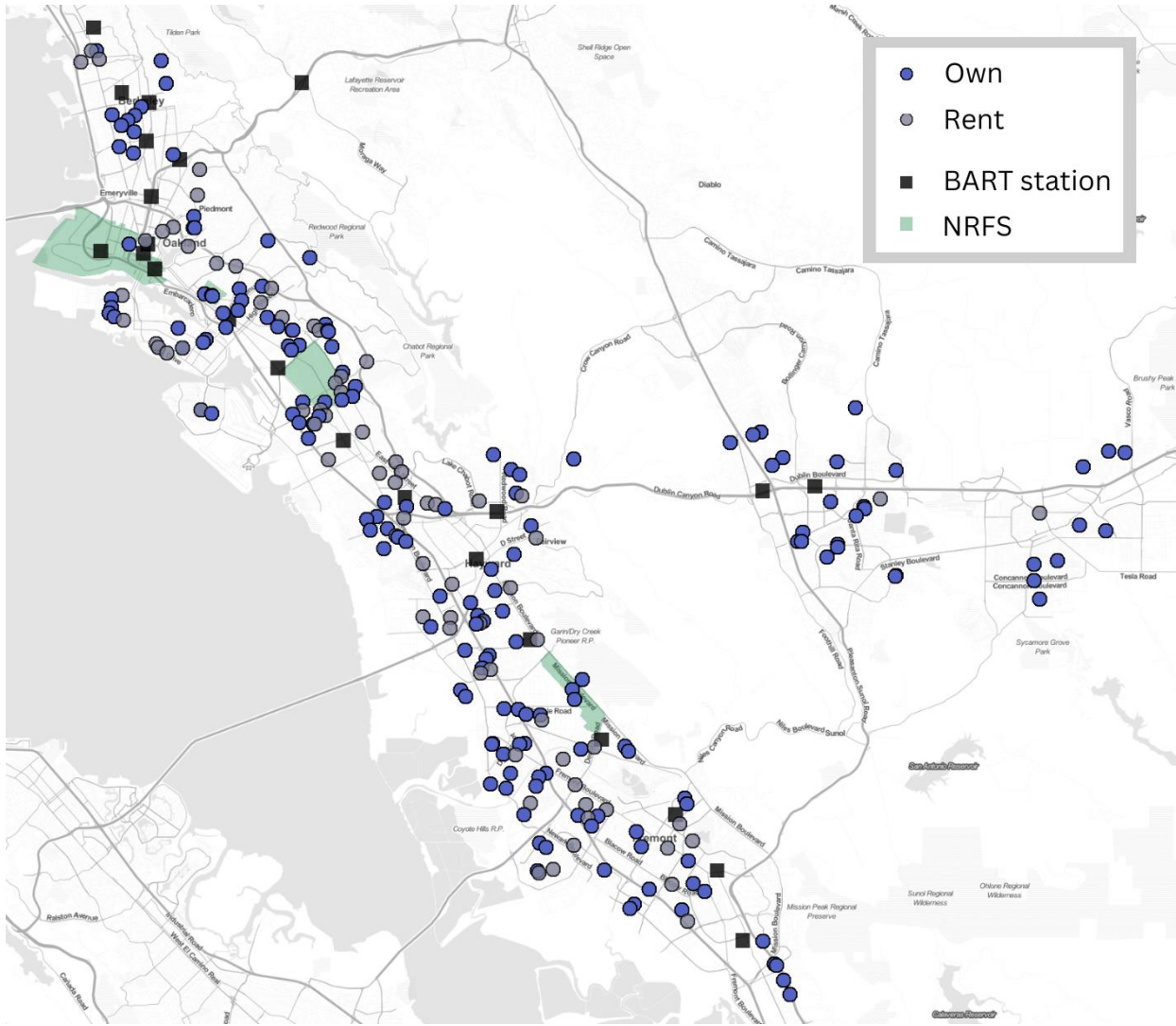
Do you anticipate problems renewing your lease?

Response	Number of Sites	Percentage of Sites
Yes	5	6.9%
No	67	93.1%
Total	72	100.0%

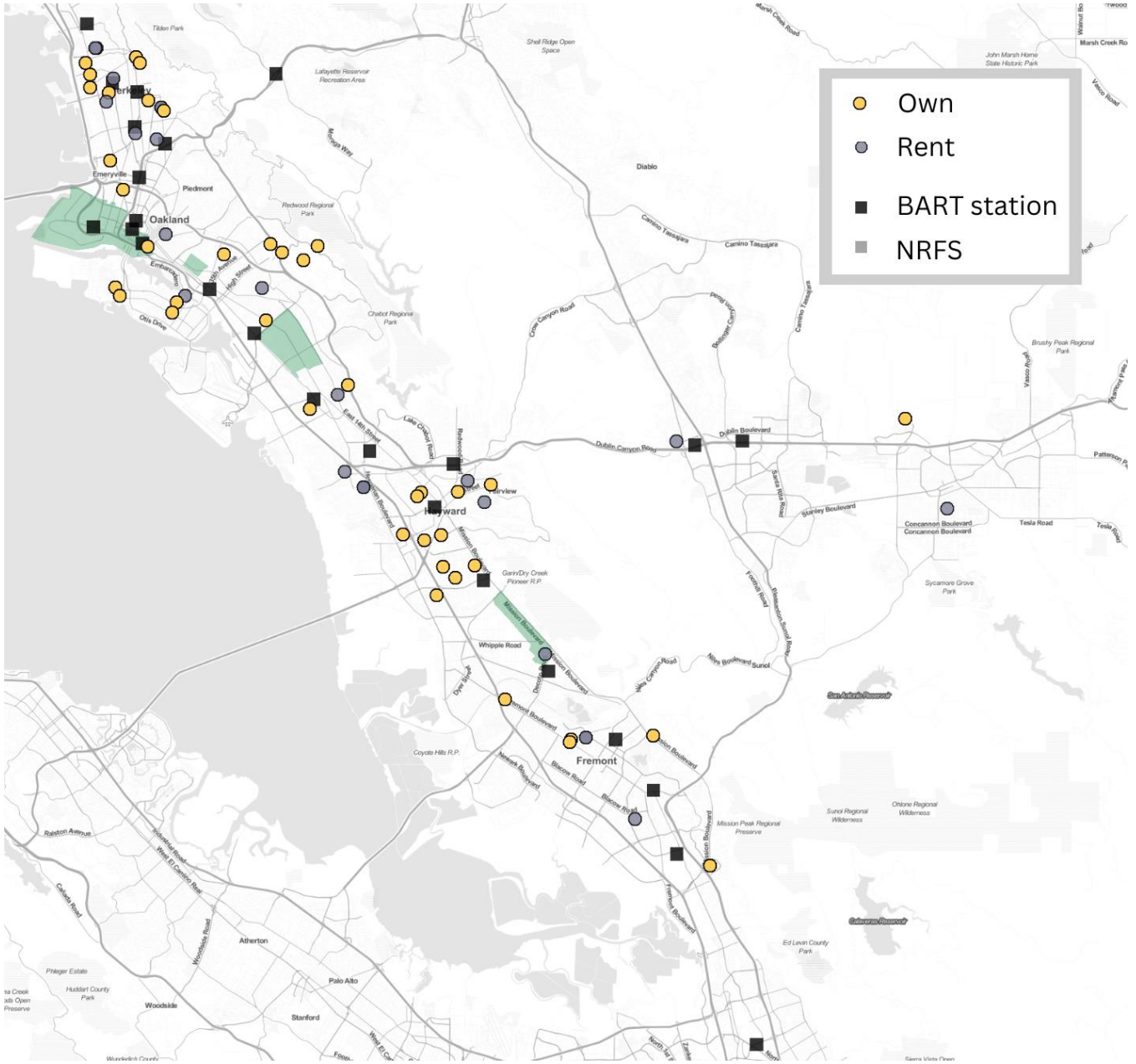
All responses except “no”, “none” or “not at this time” or similar are included in table below. Edits have been made to correct typos and minor grammar errors for clarity. Identifying information has been removed. Chinese and Spanish responses have been translated into English.

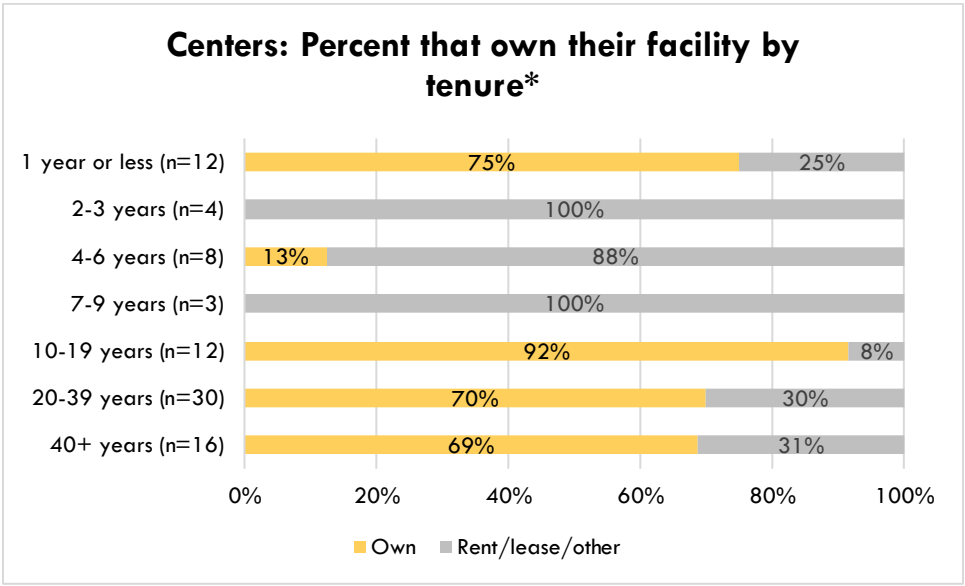
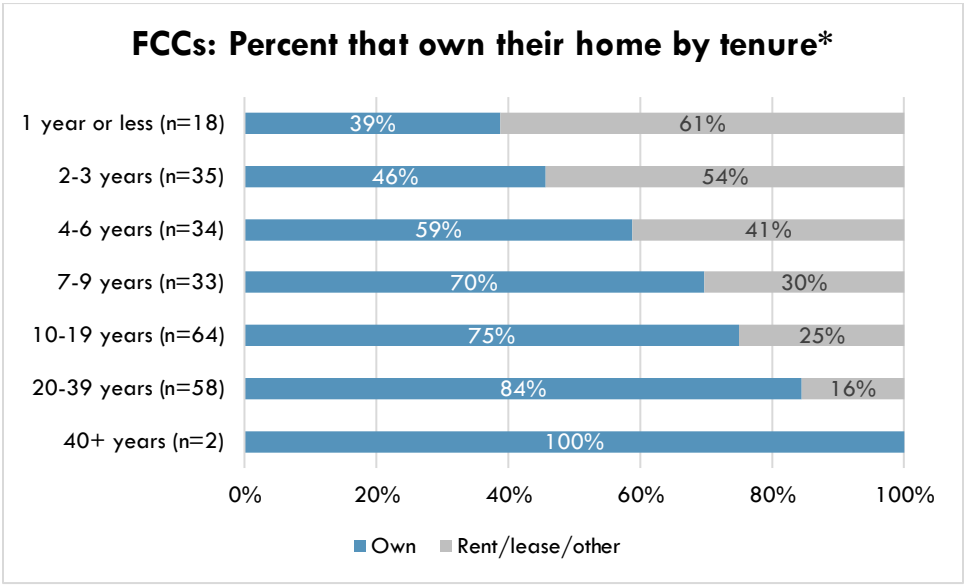
Type of Child Care	Narrative Response to Question: Do you anticipate problems renewing your lease?
Center based	The rent will be discussed
Center based	We never know when the school district will want this land
Family child care	No problem
Family child care	Not sure whether the owner can continue renewing my lease for many years. The price for selling her house is more worthy than renting to me.
Family child care	The owner may sell their house
Family child care	If I do a big brand nursery, I don't know if the owner would like it. I don't know if the owner will sell the house in the future, because the owner is an elderly person
Family child care	Landlord health

Family Child Care Home Ownership



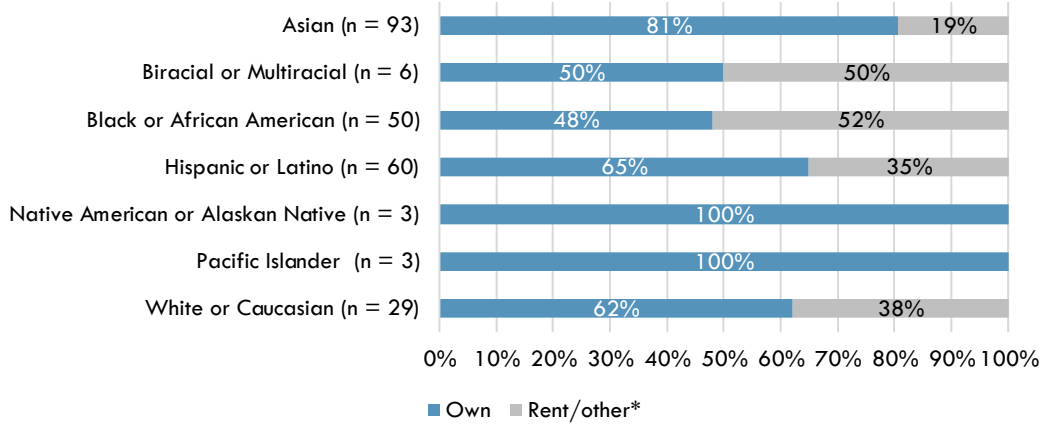
Center Facility Ownership





*Tenure refers to the number of years the child care program has been operating at the specified location.

Percent of FCC respondents that own their home by race/ethnicity



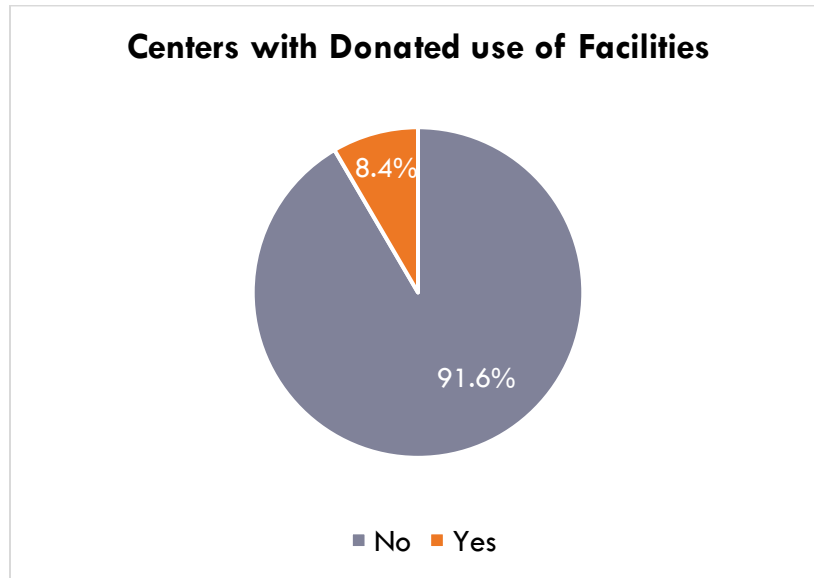
Note: Some respondents reported more than one race/ethnicity. All responses by race/ethnicity were included.

*75 respondents rent or lease and 5 respondents reported that they do not rent or lease their home.



Donated use of Facilities

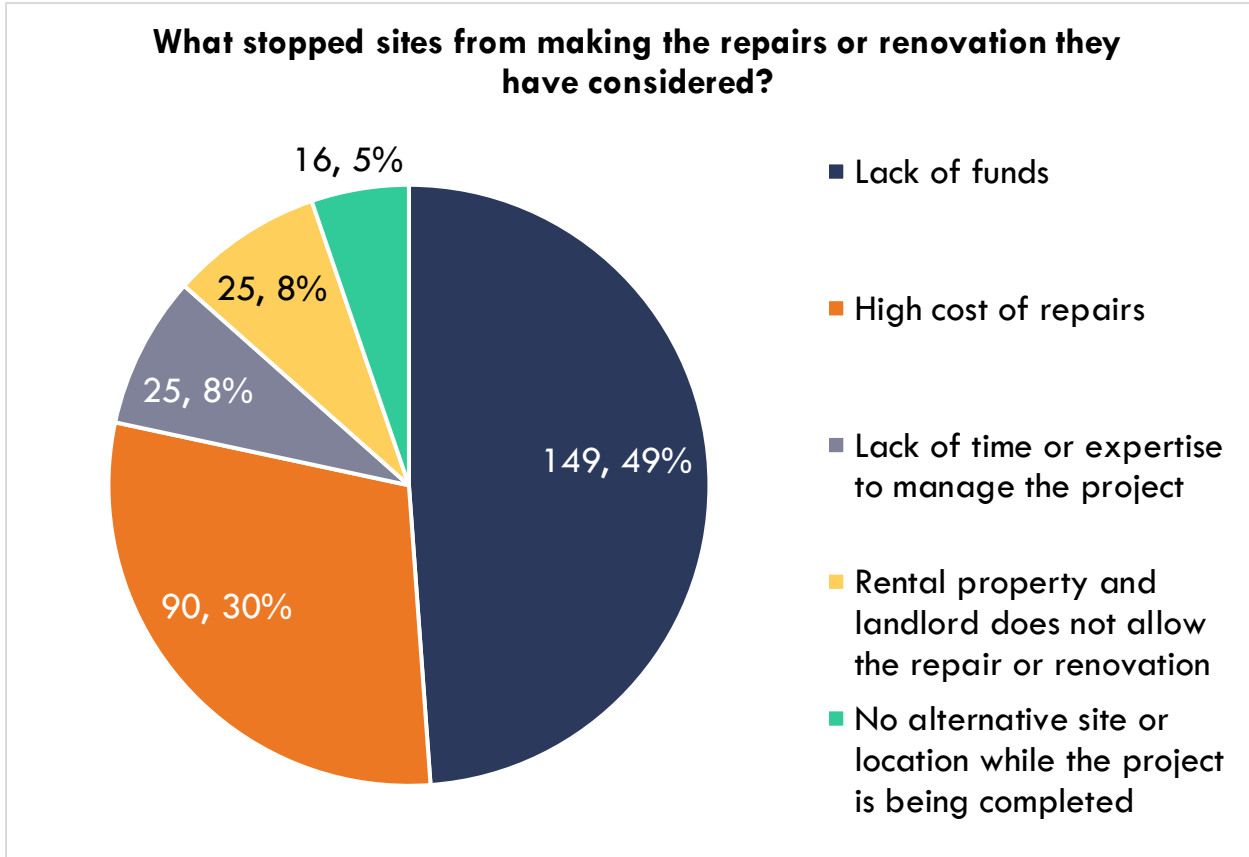
8.4% (7 of 83) of centers reported that they have donated use of facilities.



Building Type	Facility Use Donator	Number of Sites
Property built for child care	Local Post Secondary Institution	3
School district property	City Government	3
Converted residential building	Family Trust	1

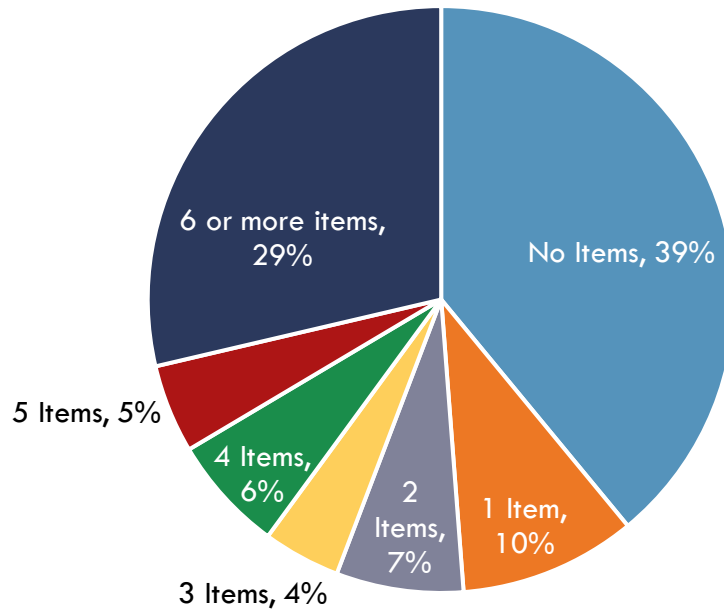
Site Condition and Maintenance

The survey asked respondents to report their perceptions of the adequacy of various components of their site facility. Most programs reported that they were keeping up with critical facilities and grounds maintenance. 29.1% of reporting sites (86 of 296) are currently investing in repairs or renovations, ranging from routine maintenance like painting, deck-sanding and carpet replacement to major energy and seismic retrofits.

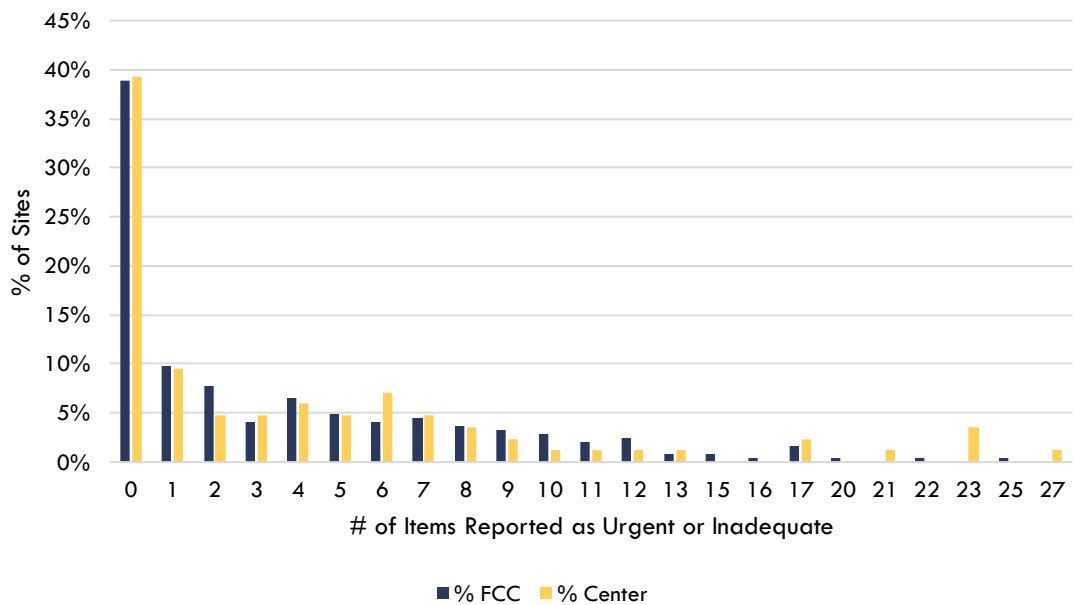


On average, family child care programs reported using 68% of their home for child care. 22.4% reported that they use more than 90% of their home for child care, with 8% reporting that they use their entire home for care.

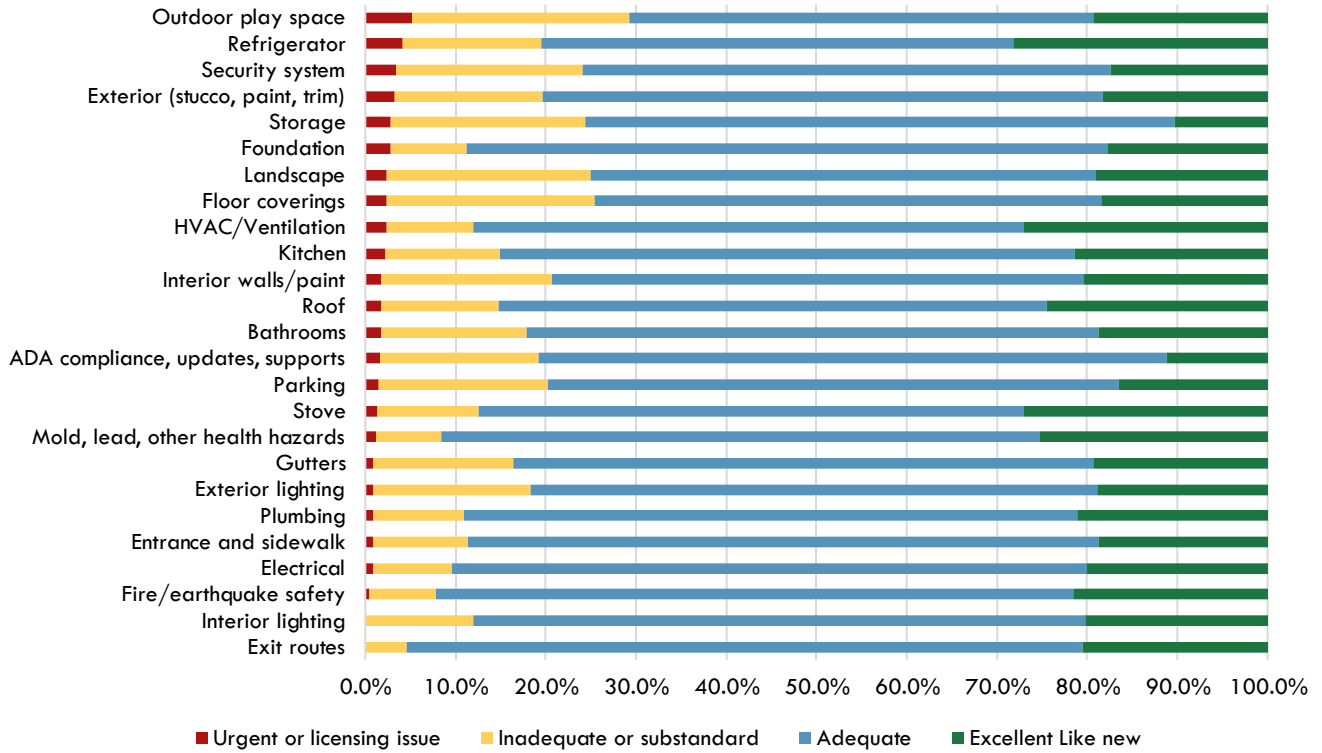
% Sites with # Items Reported as Urgent or Inadequate



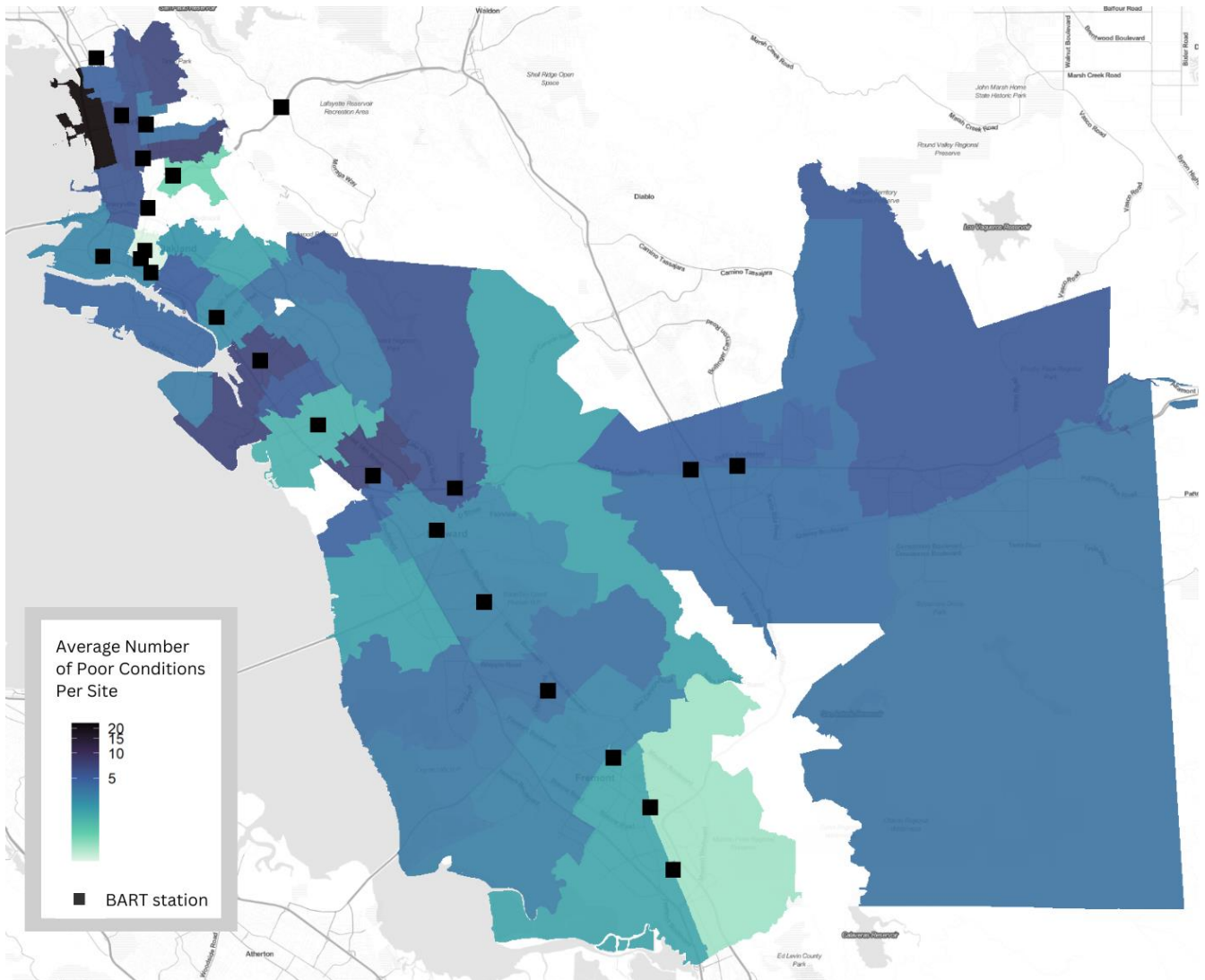
% Sites with # Items Reported as Urgent or Inadequate



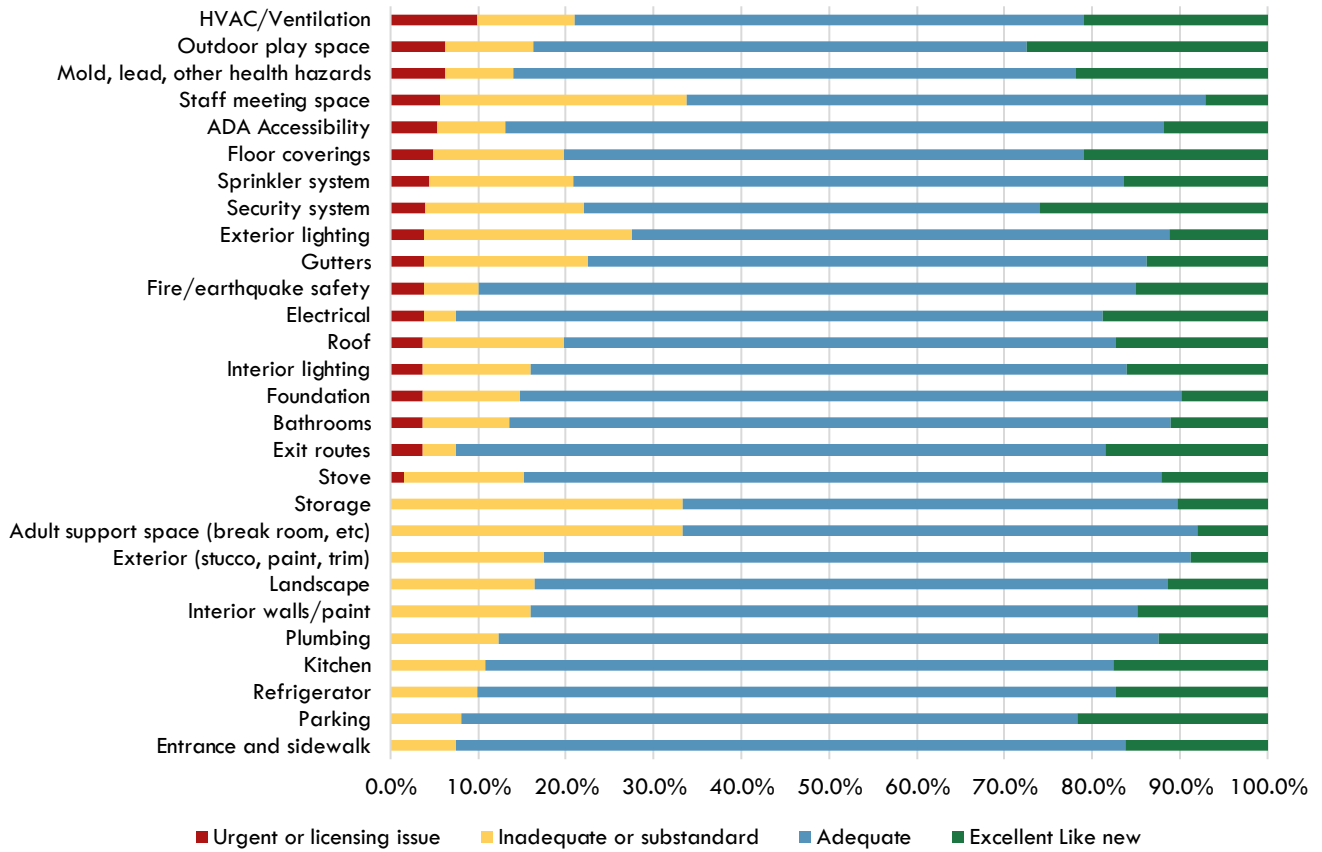
FCC: Reported Conditions of Components



Site Average Reported Number of Poor Conditions by Zip Code



Centers: Reported Conditions of Components



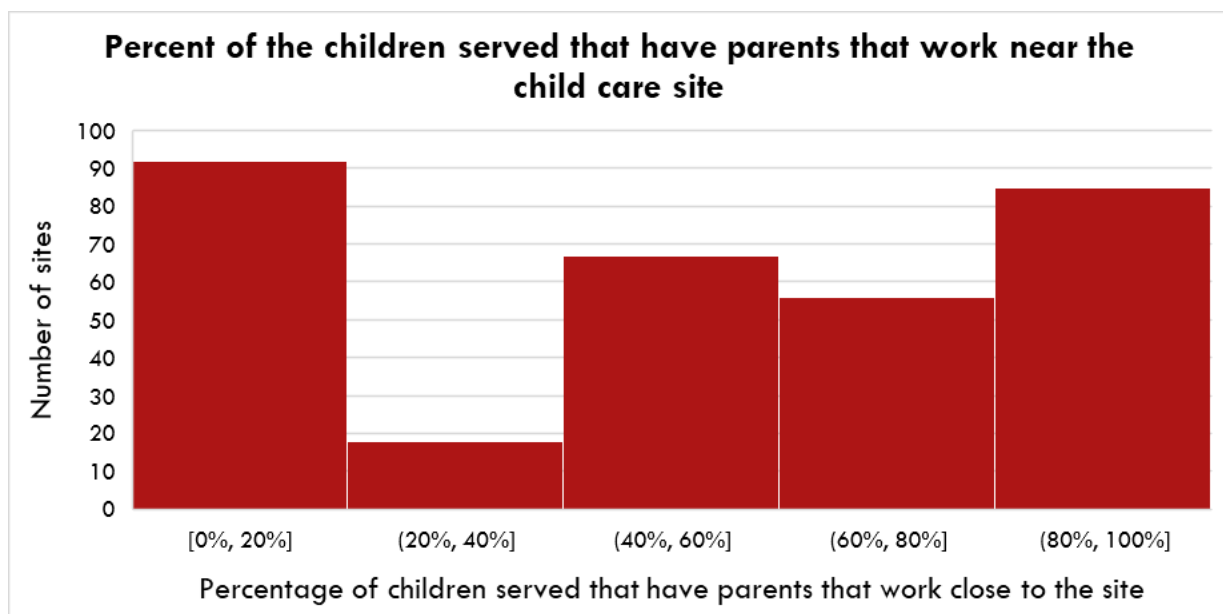
Waitlists and Enrollment Targets

The majority of sites have waitlists and would consider expanding to serve more children in Alameda County if resources were available.

- 206 of the reporting sites (63.6%) have waitlists
 - 132 sites reported a total of 1,566 infants/toddlers (age 0-24 months) on waitlists.
 - 130 sites reported a total of 2,237 preschool children (ages 2-5 years) on waitlists.

Waitlist Data by Age and Setting

Setting	Infant/Toddler			Preschool			School Age		
	% of Sites with Waitlist	Number of Infant/Toddlers	Avg Per Site	% of Sites with Waitlist	Number of Preschoolers	Avg Per Site	% of Sites with Waitlist	Number of School Age	Avg Per Site
Licensed center based care	34.5%	1,155	39.8	59.5%	1,928	38.6	15.5%	245	18.8
Licensed family child care	42.9%	411	4.0	33.3%	309	3.0	10.0%	60	0.6
Total	40.7%	1,566	11.9	40.1%	2,237	16.9	11.4%	305	2.3



Under Enrollment Percentage by Setting and Age

Setting	Infant/Toddler Under Enrollment	Preschool Under Enrollment	School Age Under Enrollment	Under Enrollment Overall
Licensed center based care	12.4%	17.0%	23.3%	17.2%
Licensed family child care	27.0%	27.1%	45.3%	30.9%
Total	21.3%	19.2%	33.6%	21.8%

Change in Under Enrollment from 2020 to 2022

Setting	2020 Survey Percent Under Enrollment	2022 Survey Percent Under Enrollment	Difference from 2020 to 2022
Licensed center based care	29.7%	17.2%	12.5%
Licensed Family child care	31.2%	30.9%	0.3%
Total	30.0%	21.8%	8.2%

Source: Also includes survey data from October 2020 distributed by First 5 Alameda County.

Interest in Expansion

- When asked “Would you or your organization/business consider expanding to serve more children ages 0-5 in Alameda County at this or another location?” 87% (257 of 296 sites) would consider expanding.
 - 91% of FCC respondents would consider expanding (196 of 216 sites)
 - 76% of center respondents would consider expanding (61 of 80 sites)

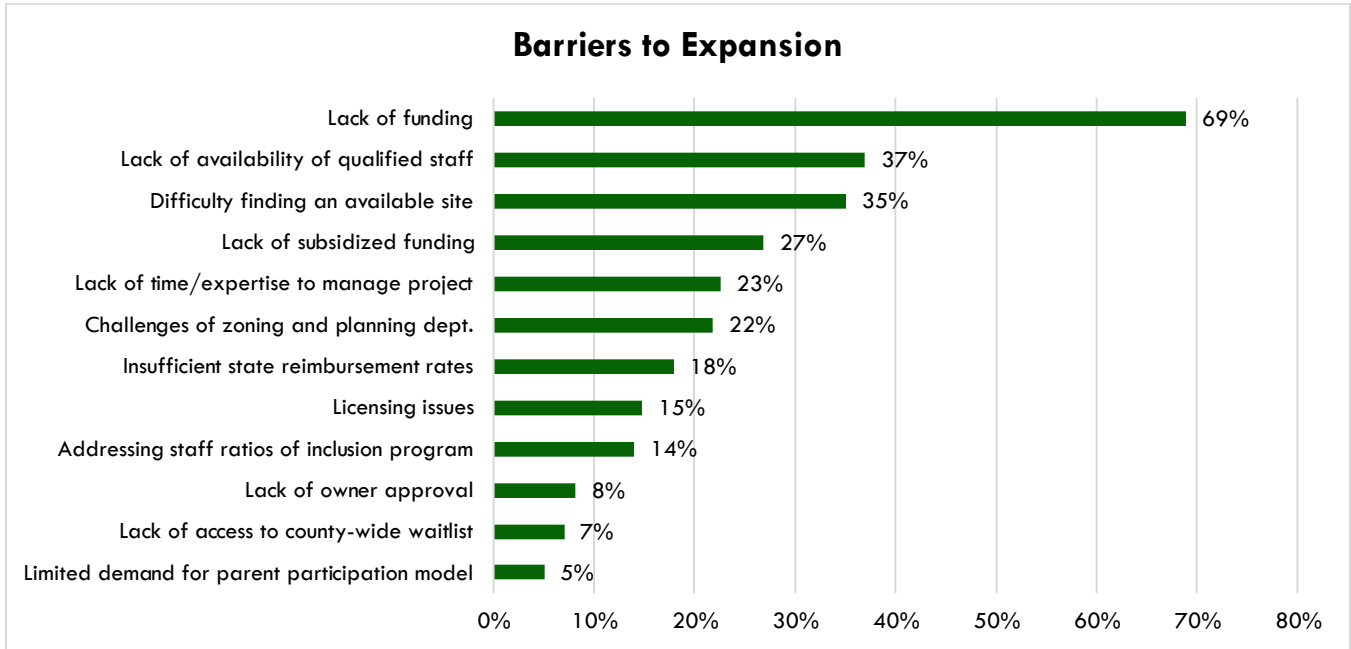
Number of Spaces

Setting	Infant/Toddlers		Preschoolers		School Age	
	Number of Spaces	Avg Number of Spaces per Site	Number of Spaces	Avg Number of Spaces per Site	Number of Spaces	Avg Number of Spaces per Site
Licensed family child care	492	2.5	865	4.4	314	1.6
Licensed center-based care	359	5.9	800	13.1	178	2.9
Total	851	4.3	1,665	8.5	492	2.5

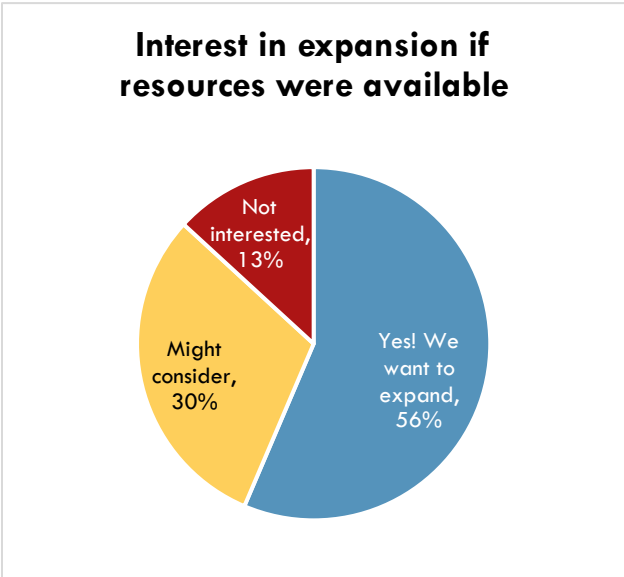
- Spaces dedicated to children with special needs
 - 85% of sites that *know* they want to expand reported that some of the spaces may be dedicated to children with special needs.
 - These sites reported that there could be at least 540 new spaces for children with special needs, which would be 18% of expanded spaces.
- Of the 167 sites that *know* they want to expand, only 9 sites (5%) don't anticipate any barriers for program expansion.
- When asked “If there was a county-wide program to assist child care providers with facilities expansion, would you or your organization be interested in finding out more and possibly participating?”, 88% (286 sites) expressed interest.

“Me gustaría más información de cómo expandir mi negocio y que procesos tengo que hacer. - *I would like more information on how to expand my business and what the process is.*”

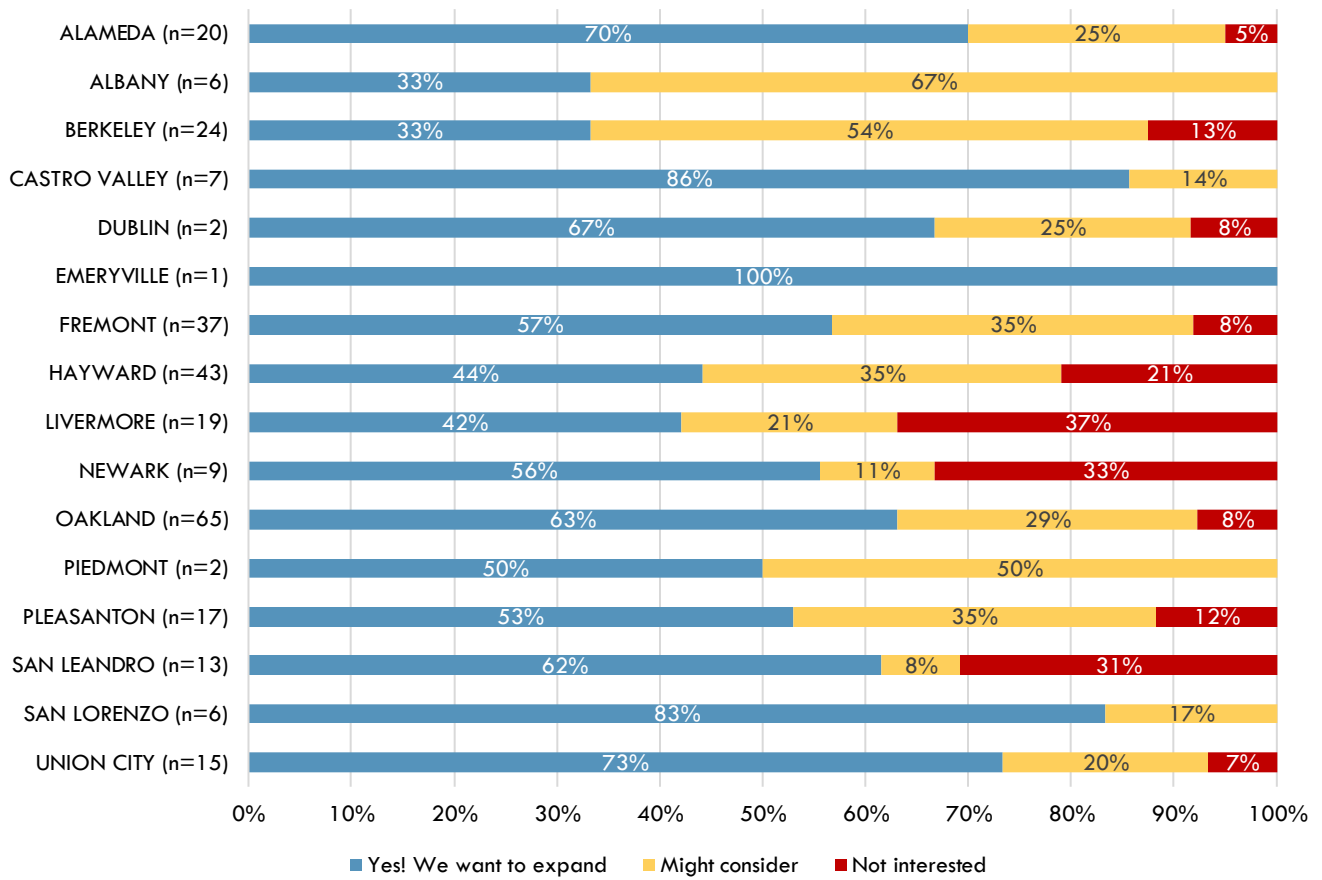
- *Family child care operating in Hayward for 9 years*



Note: Data from 257 programs who reported that they may be interested in expansion.

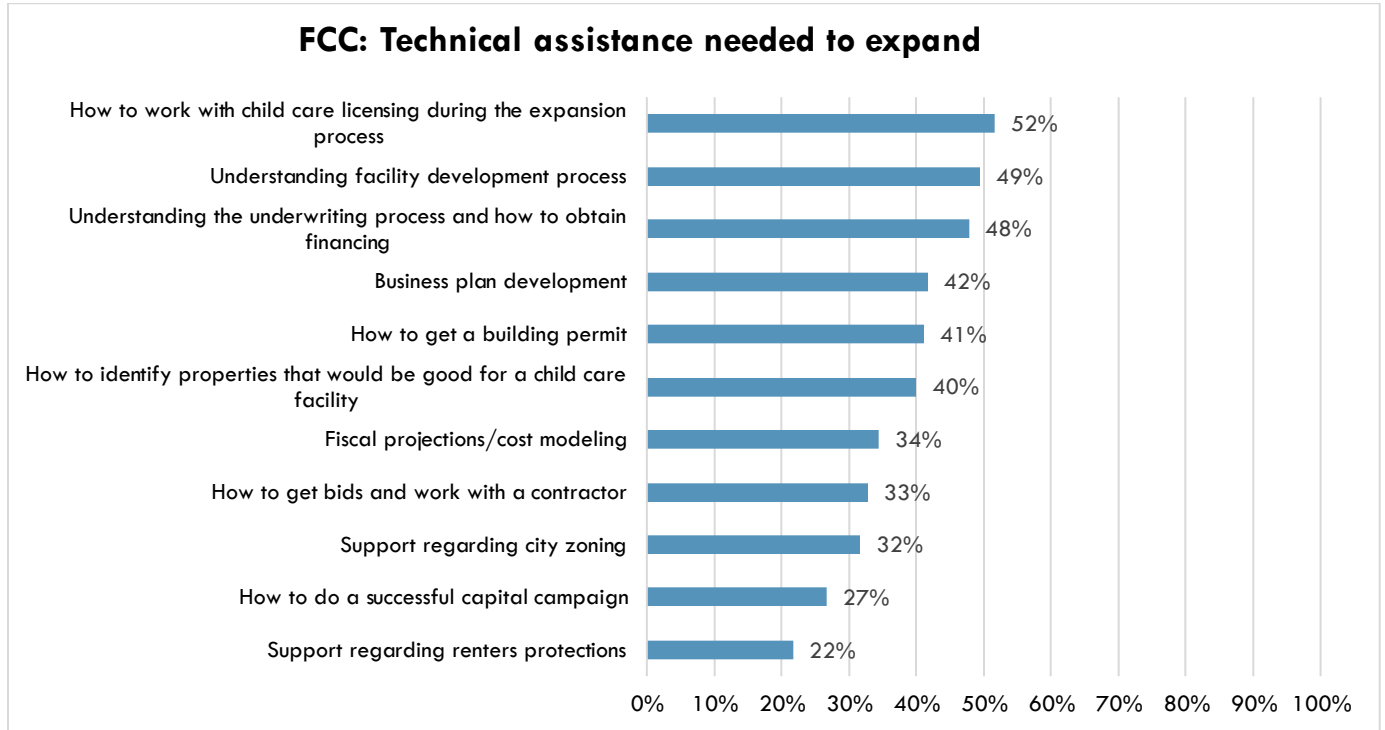


All respondents: Interest in Expansion by City

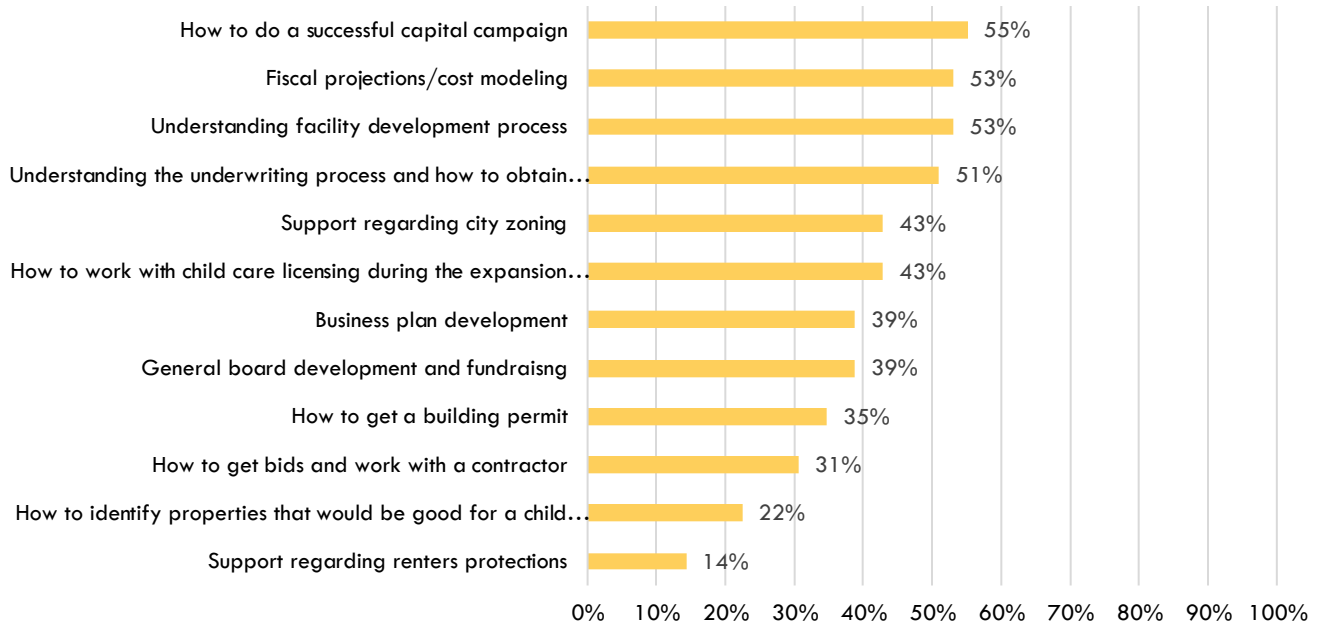


Technical Assistance Supports

Sites that expressed an interest in expanding were asked about the types of technical assistance that would be needed in order for them to expand.



Centers: Technical assistance needed to expand



Responding Providers Comments

The survey ended with an open-ended question: “Do you have anything else you would like to tell us as we consider ways to ensure adequate supply of child care facilities in Alameda County for the years to come?”

All responses except “no”, “none” or “not at this time” or similar are included in table below. Edits have been made to correct typos and minor grammar errors for clarity. Identifying information has been removed. Chinese and Spanish responses have been translated into English.



Do you have anything else you would like to tell us as we consider way to ensure adequate supply of child care facilities in Alameda County for the years to come?
If they could give me help to change the roof of my house that would be great.
Castro Valley is growing fast with residential spaces. Its residents are traveling further away from home for quality child care. We desperately need child care expansion here.
Thank you
Full support from the government.
If each childcare was allotted to have 6 infants and 12 preschoolers with teacher to student ratio change and no school age kids. My home is large enough to accommodate those need. I have been wanting to expand but the licensing regulations are not available or accommodating it. The two school-age spots are never used so that's loss of enrollment though licensed for 13 as a large daycare.
Help finding an affordable home I can buy.
I love my job and what I do... so expanding would make a brighter future for so many children in our community.
How to retain employees
Increased number of babies
Change of capacity process should be improved.
I would like to convert my entire house to a childcare center.
I would love to take more children in my home. I would love to have 100% preschool children vs. infants, but I don't know how I can do this or if my state license will allow it. I've always read I have to have infants and toddlers?
Knowing where/which location/city need more child care service? To balance the family care service and market need in different area.
I would like to rebuild the house where it actually operates and make the space more functional
Funding
We want to get grants or funding to upgrade the better environment for daycare.
I want to apply for large license.
Need to change the age ratio of infants to 18 months. That would give us opportunities to take another infant into small and large programs sooner.

I sure hope you consider helping childcare providers and don't leave us feeling like there's discrimination that only the ones who serve low income families get the top priority on any funds and grants. Thank u for listening to us and I'm sure you'll do great.
Generally, Alameda County has done a great job.
Thank you
Many other states other than California allow more than one family childcare we would appreciate if we can expand our business more for better so we can serve more children.
I would like to improve my current space in my daycare.
Got more help in the fund is subsidized.
Our extended family has a property for a second family childcare dedicated to infants and toddlers; my sister is prepared to get her large license in the home, but it needs renovation work and we lack funds. We are seeking a HELOC to get funds to complete it, but we are facing barriers. With funding we are ready to have a new FCC for 12 infants and toddlers in business by 9/22 or earlier. Thank you.
Expanding daycare providers license would help us to serve so many more families and provide the need services our parents and communities need. Providing upgrades to our existing homes to provide the needed care is more cost effective and allowing us to have access to funds to help our business is important. We are already under paid and these services are the stepping stone to children's lives. This is urgent.
What requirement to setup center
I am very worried that the state will have universal preschool and take all of my older kids out of my care and not sure if I will find other kids to take first space, I'm not sure I would want to expand knowing that children might get free preschool at the public schools in the near future this terrifies me.
I would like more information about how to expand my business, how to expand it and the processes which I have to do
Hard to find rental property to do daycare.
I would like to grow my business in my own site for that I need financial help and administration orientation
It is hoped that the regulation will be unrestricted, and the childcare rights can be fully opened to renters
Create a website to provide licensed family childcare information, allowing parents to choose the right childcare center
I would like to have more information regarding this
Been in this for less number of months to know that
You're on the right track of help is needed!
Marketing the benefits of a career in ECD, enhance pay from county and not the parent.
How I can get subsidized children.
I would like to make my dream of having a private school for small children come true
Anything they can provide us
Helping us find and understand how to expand
I want to register for quality care training
Rental houses could be used just for daycare
My city's firefighters have never approved the expansion of my daycare
Emergency supplies if needed
I want to know how to apply for the one for minor repairs and continue with the second to remodel my infant daycare room
A lot of us are having difficulty expanding due to square footage issues, funding, knowledge of how a center/bigger daycare needs to be structured and ran. Perhaps block grants will be a great idea to help daycare providers to expand to an actual location and not have to worry about financial issues for the first 3 to 5 years.
More funds and subsidiary programs

Early Learning Facilities Needs Assessment

I need more space for kids so we can do more learning
Provide more gloves, disinfecting stuff, masks to the family child cares
Raise the salary for childcare provider
Hope to provide a reference for the charges of different quality nurseries. In addition, I hope that relevant institutions can hold some lectures to strengthen parenting education for parents, respect the duties of childcare, so as to improve the enthusiasm of childcare workers! Complaining about childcare workers at every turn will make everyone have reservations when teaching at work, and it is the children who suffer.
Need to develop concentration in preschoolers
PPE , antigen test, cleaner, disinfectant etc.
Increase the number of admissions for licenses
Well, we providers need support
Yes, please consider providing home daycare providers referral services for parents to reach out to home daycares. It's greatly needed, especially now during Covid. Thank you kindly.
Many thanks to childcare institutions for adequate supply
Help with payroll and a refi home program.
Owning a house to do a daycare is better than renting
Having a yard would be nice. Especially during Covid. It is hard having to avoid the park because of overcrowding or having to leave early for the same reason. Aside from the pandemic a yard would be nice but it isn't a necessity.
Raise fees
That it is very important that children have enough space in the childcare centers for their development
It is best that small-brand nurseries can have 4 under two years old and 2 over two years old children. Places for children under two years of age are often in short supply
Please support family daycare to expand with more benefits
Looking forward to the number of services and the quality of service can be satisfied, the staff are very hard, I hope their families can also be taken care of
Help with transitioning family childcare to centers would be great! I know a number of other family care providers who would love to do this too!
About unemployment
I greatly appreciate the Resource and Referrals. I appreciate how they keep child care providers updated. Child care providers are essentials to the foundation of early learning. We want to be equipped with the tools needed to support kids and families especially during these special times.
More support.
Please supply us with hand washing soap, bleach, and Lysol wipes
I think the years that daycare providers have been operated already should be credited towards the years of work they would need in a supervised school environment in order to become a center director.
How to be able to fill my capacity, I have space for 5 infants
Get Licensing to change the capacity requirements.
Home ownership program for providers.
Special expansion grants would help
It would be amazing to be able to apply for grants for construction and remodel of our current sites. If Covid had hit us this hard, many of us would have done the work needed to keep our business thriving but we such a steep loss of income the risk of closing for construction is TOO HIGH! Please help us remain open!
We need your support so we can support the children and their families!
Funding and affordable home based and commercial spaces biggest barrier.

Childcare needs are high, we need to develop support for families and programs to find each other -no program should be under enrolled as the needs are out there and some programs seek enrollment.
Thank you for the work you're doing!
WE NEED HELP ASAP
You need to reimburse subsidized spaces at market rate, we can't provide the difference
Contact admin department
Just concerned it will be difficult as COVID concerns continue
Any help at all would be appreciated!
Staffing is a MUST. We are not getting applications and are constantly looking.
Help us have a fresh outdoor facility for children to grow better.
Infant and after-school care are in high demand
Childcare going through a terrible loss in business due to pandemic and extreme shortage of staff any fund that could help the owners of the school as well as teachers benefit would be great. Funding to keep running the business would be very helpful since it is a lot on our plate right now with CDC guidelines, protocol follow up, lack of funding and its extremely stressful
I have a site that I'm looking into in Dublin. I would love to expand my program and build a new site in Dublin to expand and provide care
We do need a lot more funding/grant/stipends from local and state government to support the child care centers as the on-going pandemic deeply hurts the industry.
We are interested in sites where there are close to Fremont or Southern Alameda County
Takes too much time to get city permits
There is more to expansion than just expanding services - there are things to consider that Directors need to consider when expanding. Like how expansion pulls away a director -- funding also has to go to supporting additional staff while an ED or Administration is tending to the building and fundraising and oversight of expansion.
Our program has a long standing in the community.
I appreciate the support we have received. Quality is most important than expanding.
It's not just a question of facilities, it's a question of paying teachers a living wage so they want to stay in this industry.
Alameda is primarily residential and hard to find space
We need to address long term staff retention in the Bay Area. The cost of living, teacher salaries, and expectations on teachers/schools are in conflict with one another. We feel so fortunate that we are able to pay our teachers a competitive salary, but we also charge high tuition rates and have less available for financial aid sadly.
Teachers need to be paid more and given better benefits.

CITATIONS AND REFERENCES

- ⁱ Based on [cost per slot estimates](#) by facility type applied to the conditions of the local landscape for licensed child care. This does not include the cost to address deferred maintenance for existing facilities.
- ⁱⁱ Applied Survey Research. (2020). 2019 Alameda County Kindergarten Readiness Assessment. <http://www.first5alameda.org/2019-alameda-county-kindergarten-readiness-assessment>
- ⁱⁱⁱ Insight Center (2021). California Family Needs Calculator (formerly the California Family Economic Self-Sufficiency Standard or Self-Sufficiency Standard), Alameda County. Retrieved from <https://insightcced.org/family-needs-calculator/> and Insight Center (2021). Family Needs Indicator - Alameda County Fact Sheet. Retrieved from: <https://insightcced.org/the-cost-of-being-californian-alameda-county-fact-sheet/>
- ^{iv} Alameda County Early Care and Education Planning Council, Alameda County Early Care and Education Needs Assessment. (2021) 6.4. Retrieved from <http://www.first5alameda.org/files/2021%20Alameda%20County%20ECE%20Needs%20Assessment%20FINAL.pdf>
- ^v California Early Care and Education (ECE) Workforce Registry. (October 2020). Note: Self-reported data for 2,348 people registered in the Alameda County Workforce Registry as of October 2020. The Workforce Registry only represents a subset of the ECE workforce as it is a voluntary database. The registry includes an overrepresentation of those working at child care centers and Title 5 programs compared to other child care program types. Registry participants report wages as an hourly gross rate or annual, monthly, or weekly gross salary. Annual wage was calculated by multiplying their self-reported wage and their self-reported number of hours worked by 50 weeks.
- ^{vi} Alameda County Early Care and Education Planning Council, Alameda County Early Care and Education Needs Assessment. (2021) 6.4. Retrieved from <http://www.first5alameda.org/files/2021%20Alameda%20County%20ECE%20Needs%20Assessment%20FINAL.pdf>
- ^{vii} Estimate based on extrapolation from survey data and administrative data from October 2020 Alameda County Child Care Program Survey conducted by the Alameda County Early Care and Education Program Local Planning Council and First 5 Alameda County
- ^{viii} Definition of working family: Civilian Labor Force consists of people classified as employed or unemployed in accordance with the criteria described: Employed - This category includes all civilians 16 years old and over who either (1) were "at work," that is, those who did any work at all during the reference week as paid employees, worked in their own business or profession, worked on their own farm, or worked 15 hours or more as unpaid workers on a family farm or in a family business; or (2) were "with a job but not at work," that is, those who did not work during the reference week but had jobs or businesses from which they were temporarily absent due to illness, bad weather, industrial dispute, vacation, or other personal reasons. Excluded from the employed are people whose only activity consisted of work around the house or unpaid volunteer work for religious, charitable, and similar organizations; also excluded are all institutionalized people and people on active duty in the United States Armed Forces. For the complete definition, go to [ACS subject definitions](#) "Employment Status."
- ^{ix} Definition of working family: Civilian Labor Force consists of people classified as employed or unemployed in accordance with the criteria described: Employed - This category includes all civilians 16 years old and over who either (1) were "at work," that is, those who did any work at all during the reference week as paid employees, worked in their own business or profession, worked on their own farm, or worked 15 hours or more as unpaid workers on a family farm or in a family business; or (2) were "with a job but not at work," that is, those who did not work during the reference week but had jobs or businesses from which they were temporarily absent due to illness, bad weather, industrial dispute, vacation, or other personal reasons. Excluded from the employed are people whose only activity consisted of work around the house or unpaid volunteer work for religious, charitable, and similar organizations; also excluded are all institutionalized people and people on active duty in the United States Armed Forces. For the complete definition, go to [ACS subject definitions](#) "Employment Status."

APPENDICES AND TABLES

Infant/Toddler Unmet Need for 100% of Children – All Zip Codes

Region	City	Zip Code	Number of Infant/Toddlers Without a Licensed Space	Unmet Need for 100% of Infant/Toddlers
South	Union City, Hayward	94587	2,450	93.8%
North	Oakland	94601	2,256	95.6%
South	Hayward, Ashland, Cherryland, Fairview, San Lorenzo	94541	2,242	91.1%
South	Fremont	94536	2,153	90.8%
South	Hayward	94544	2,106	91.4%
North	Alameda	94501	1,944	87.8%
East	Livermore	94550	1,931	91.2%
South	Fremont	94538	1,876	89.2%
East	Dublin	94568	1,839	88.1%
South	Castro Valley	94546	1,771	91.1%
East	Pleasanton, Sunol	94566	1,656	89.5%
South	Fremont	94539	1,642	95.0%
South	San Leandro	94577	1,603	95.8%
South	San Leandro, Ashland	94578	1,542	96.9%
North	Oakland	94603	1,537	96.5%
North	Oakland	94605	1,529	86.3%
South	Newark	94560	1,505	93.9%
North	Oakland	94621	1,474	94.2%
East	Livermore, Dublin	94551	1,445	86.8%
North	Oakland, Piedmont	94611	1,394	97.1%

North	Oakland	94606	1,325	95.5%
East	Pleasanton, Hayward, Sunol	94588	1,294	92.8%
South	San Lorenzo, Ashland, Hayward	94580	1,170	93.4%
South	Fremont	94555	1,129	90.7%
North	Oakland	94602	1,096	90.8%
North	Oakland, Piedmont	94610	1,070	94.7%
North	Oakland	94619	899	86.5%
North	Oakland	94607	876	92.6%
North	Emeryville, Oakland	94608	870	81.8%
South	Hayward	94545	867	92.3%
North	Oakland	94609	761	96.9%
South	San Leandro	94579	720	95.0%
South	Hayward, Sunol	94552	596	98.2%
North	Oakland	94618	594	94.4%
North	Berkeley, Oakland	94704	544	82.8%
North	Albany, Berkeley	94706	452	89.9%
North	Oakland	94612	443	81.4%
North	Alameda	94502	435	87.2%
South	Hayward, Fairview	94542	406	96.4%
North	Berkeley	94703	387	76.5%
North	Berkeley	94707	322	96.7%
North	Oakland, Berkeley	94705	315	88.5%
North	Berkeley	94709	301	100.0%
North	Berkeley	94708	301	97.7%

North	Berkeley	94702	271	66.1%
North	Berkeley, Albany	94710	55	30.9%
East	Sunol	94586	45	100.0%
North	Oakland	94613	16	55.2%
North	Berkeley	94720	0	0.0%

Source: Unmet need analysis from the 2021 Alameda County R&R Child Care Site Data and 2020 American Institutes for Research Early Learning Needs Assessment Tool (ELNAT) data for the number of children by zip code. School age excluded due to the extensive use of unlicensed programs and settings.

First 5 Alameda recognizes that there is not currently an ideal measure of demand for licensed infant/toddler child care in the county, and that no proxy estimate of demand can offer the full picture of demand for this critical service for families. Not all infants/toddlers in “working families” need or want licensed child care, and we recognize that there are infants/toddlers whose families need or want licensed child care even though the census doesn’t identify them as a member of a “working family.” Also, families, particularly those seeking infant/toddler care, may prefer to care closer to work than to home. Consequently, this approach to estimating demand for licensed infant/toddler child care serves as one perspective of demand.

Infant/Toddler Unmet Need for Children in Working Families – All Zip Codes

Region	City	Zip Code	Number of Infant/Toddlers Without a Licensed Space	Unmet Need for the Number of Children in Working Families
South	Hayward	94544	1,629	89.2%
South	Hayward, Ashland, Cherryland, Fairview, San Lorenzo	94541	1,355	86.1%
South	Union City, Hayward	94587	1,233	88.3%
North	Alameda	94501	1,176	81.4%
South	Fremont	94536	1,080	83.1%
South	San Leandro	94577	1,022	93.6%
North	Oakland	94601	1,022	90.7%
North	Oakland, Piedmont	94611	987	96.0%
East	Livermore	94550	979	84.0%
South	Fremont	94538	926	80.4%
South	Castro Valley	94546	920	84.2%
South	San Leandro, Ashland	94578	911	94.9%
East	Dublin	94568	900	78.3%
South	Fremont	94539	858	90.8%
North	Oakland	94605	826	77.3%

East	Pleasanton, Sunol	94566	822	80.8%
South	Newark	94560	753	88.6%
North	Oakland	94603	732	93.0%
East	Livermore, Dublin	94551	697	76.0%
South	Hayward	94545	672	90.3%
East	Pleasanton, Hayward, Sunol	94588	667	87.0%
North	Oakland	94602	662	85.6%
North	Oakland	94621	660	88.0%
North	Oakland, Piedmont	94610	638	91.4%
South	San Lorenzo, Ashland, Hayward	94580	622	88.2%
North	Oakland	94606	590	90.4%
South	Fremont	94555	552	82.6%
North	Oakland	94619	503	78.2%
South	San Leandro	94579	457	92.3%
North	Oakland	94609	422	94.6%
North	Oakland	94618	417	92.3%
North	Oakland	94607	375	84.3%
South	Hayward, Sunol	94552	359	97.0%
North	Berkeley, Oakland	94704	339	75.0%
North	Emeryville, Oakland	94608	308	61.5%
South	Hayward, Fairview	94542	304	95.3%
North	Albany, Berkeley	94706	297	85.3%
North	Alameda	94502	262	80.4%
North	Berkeley	94703	230	65.9%
North	Berkeley	94709	209	100.0%

North	Oakland, Berkeley	94705	209	83.6%
North	Berkeley	94707	208	95.0%
North	Berkeley	94708	197	96.6%
North	Oakland	94612	156	60.7%
North	Berkeley	94702	144	50.9%
East	Sunol	94586	25	100.0%
North	Oakland	94613	10	43.5%
North	Berkeley, Albany	94710	1	0.8%
North	Berkeley	94720	-	0.0%

Source: Unmet need analysis from the 2021 Alameda County R&R Child Care Site Data and 2020 American Institutes for Research Early Learning Needs Assessment Tool (ELNAT) data for the number of children by zip code. School age excluded due to the extensive use of unlicensed programs and settings.

Preschool Unmet Need for 100% of Children – All Zip Codes

Region	City	Zip Code	Number of Preschoolers Without a Licensed Space	Unmet Need for 100% of Preschoolers
South	Union City, Hayward	94587	1,470	66.5%
South	Fremont	94538	1,420	56.3%
South	Fremont	94536	1,176	41.3%
East	Livermore	94550	1,128	58.5%
South	San Leandro, Ashland	94578	1,108	76.2%
South	San Leandro	94577	1,093	66.0%
North	Oakland, Piedmont	94611	1,069	72.7%
South	Hayward, Ashland, Cherryland, Fairview, San Lorenzo	94541	1,066	51.4%
North	Oakland	94603	1,046	82.7%
North	Oakland	94605	989	61.4%
North	Oakland	94601	971	54.3%
South	Hayward	94544	921	48.1%
South	Castro Valley	94546	917	55.6%
North	Oakland	94621	817	67.2%
South	Fremont	94539	732	35.8%
North	Alameda	94501	729	33.3%
East	Livermore, Dublin	94551	706	46.6%
East	Pleasanton, Hayward, Sunol	94588	691	54.4%
South	San Lorenzo, Ashland, Hayward	94580	664	62.5%
North	Oakland	94602	603	52.8%
North	Berkeley, Oakland	94704	578	76.5%
North	Oakland, Piedmont	94610	568	56.0%

South	San Leandro	94579	558	74.4%
North	Oakland	94606	532	54.0%
East	Pleasanton, Sunol	94566	526	31.3%
South	Newark	94560	519	38.3%
South	Hayward	94545	382	49.0%
South	Hayward, Sunol	94552	369	71.9%
South	Hayward, Fairview	94542	313	89.2%
North	Oakland	94618	283	43.7%
North	Oakland	94609	205	31.3%
North	Berkeley	94703	202	34.6%
South	Fremont	94555	194	16.2%
North	Oakland, Berkeley	94705	191	47.5%
North	Emeryville, Oakland	94608	185	24.5%
East	Dublin	94568	176	9.3%
North	Albany, Berkeley	94706	164	28.2%
North	Berkeley	94708	148	47.4%
North	Berkeley	94702	94	20.0%
North	Oakland	94612	79	20.4%
North	Oakland	94607	60	8.9%
North	Alameda	94502	59	11.9%
North	Berkeley	94707	55	16.5%
East	Sunol	94586	0	0.0%
North	Oakland	94613	0	0.0%
North	Oakland	94619	0	0.0%

North	Berkeley	94709	0	0.0%
North	Berkeley	94720	0	0.0%
North	Berkeley, Albany	94710	0	0.0%

Source: Unmet need analysis from the 2021 Alameda County R&R Child Care Site Data and 2020 American Institutes for Research Early Learning Needs Assessment Tool (ELNAT) data for the number of children by zip code. School age excluded due to the extensive use of unlicensed programs and settings. Data set includes the top 10 zip codes for number of children without a licensed space and the top 10 zip codes for percentage of children without a licensed space.

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Preschool Unmet Need for Children in Working Families – All Zip Codes

Region	City	Zip Code	Number of Preschoolers Without a Licensed Space	Unmet Need for the Number of Children in Working Families
South	Union City, Hayward	94587	1,016	57.9%
South	Hayward	94544	890	47.2%
South	San Leandro, Ashland	94578	656	65.5%
South	San Leandro	94577	649	53.6%
North	Oakland	94603	645	74.7%
South	Hayward, Ashland, Cherryland, Fairview, San Lorenzo	94541	566	36.0%
East	Livermore	94550	552	40.8%
North	Oakland, Piedmont	94611	516	56.2%
South	Fremont	94538	484	30.6%
North	Oakland	94601	439	35.0%
North	Oakland	94621	425	51.6%
North	Oakland	94605	413	39.9%
South	Hayward	94545	369	48.1%
South	San Leandro	94579	357	65.0%
South	Castro Valley	94546	333	31.2%
East	Pleasanton, Hayward, Sunol	94588	313	35.1%
North	Oakland	94606	302	39.9%

South	Hayward, Fairview	94542	289	88.4%
South	San Lorenzo, Ashland, Hayward	94580	289	42.0%
North	Berkeley, Oakland	94704	279	61.1%
East	Livermore, Dublin	94551	255	23.9%
South	Newark	94560	237	22.1%
North	Oakland, Piedmont	94610	233	34.3%
South	Hayward, Sunol	94552	223	60.8%
North	Oakland	94602	190	26.1%
North	Alameda	94501	142	8.9%
South	Fremont	94536	119	6.7%
North	Oakland	94618	38	9.5%
North	Berkeley	94708	34	17.2%
North	Oakland, Berkeley	94705	33	13.5%
East	Pleasanton, Sunol	94566	27	2.3%
North	Emeryville, Oakland	94608	8	1.4%
North	Oakland	94609	6	1.3%
South	Fremont	94539	-	0.0%
North	Oakland	94612	-	0.0%
North	Berkeley	94703	-	0.0%
South	Fremont	94555	-	0.0%
North	Albany, Berkeley	94706	-	0.0%
North	Oakland	94607	-	0.0%
North	Alameda	94502	-	0.0%
East	Dublin	94568	-	0.0%

North	Berkeley	94707	-	0.0%
North	Berkeley	94702	-	0.0%
North	Oakland	94619	-	0.0%
East	Sunol	94586	-	0.0%
North	Berkeley	94709	-	0.0%
North	Berkeley	94720	-	0.0%
North	Oakland	94613	-	0.0%
North	Berkeley, Albany	94710	-	0.0%