BRION & ASSOCIATES

FINAL REPORT:

2012 UPDATE
CHILD CARE ECONOMIC IMPACT ANALYSIS
FOR SONOMA COUNTY

Prepared for:
Child Care Planning Council of Sonoma County

Child Care Planning Council of Sonoma County

Prepared by

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I. Introduction and Summary of Findings

This study provides an assessment of the economic impact of the child care industry in Sonoma County as of 2012. It represents an update and expansion of a similar study prepared for the County in 2002. We have also included information and data on the current state of child care supply and demand as well as demographic information about the general population and children in the County.

The purpose of this study is to educate the public and local policy makers about the importance of child care in the local economy. Not only does child care allow parents to go to work, it allows children to learn, grow, and develop in order to lead healthy and productive lives. Numerous studies have shown the significant benefit of early care and education, including child care. According to Professor James Heckman, an economist at The University of Chicago, the longer we wait to intervene in the life cycle of the child, the more costly it is to remediate.[1]

The Child Care Planning Council of Sonoma County (Council) retained Brion & Associates to conduct this study, for which we worked closely with the Council's Child Care Coordinator. The study uses the most current and up-to-date data available. The study helps to demonstrate how important child care is in every county in California, and especially smaller rural counties such as Sonoma. It also places the child care industry in the context of other large industries in the County.

Child care supports families and children, keeps parents working, and drives local economies. Quality child care allows parents to work, to feel comfortable being away from their children, and is shown to reduce absenteeism, which is a direct benefit to employers and businesses. Many public agencies offer child care on-site to public employees because they recognize the importance of child care to quality of life and its potential to increase worker productivity. According to the 2002 NEDLC study, early care and education (also called early childhood education) produces numerous economic benefits. Children who have experienced high quality early childhood education are more likely to have increased behavioral and academic readiness, which can lead to greater success in grades K-12, including higher test scores and graduation rates. This in turn leads to fewer public dollars spent on remedial education and a more prepared workforce to support the local economy. Early childhood education can also decrease public spending by lowering of criminal justice costs from youth delinquency and reducing welfare use. Investing in children at an early age therefore generates life-long benefits for children and society as a whole.

[1] "Upstream Investments to Reduce Long-Range Demand for County Criminal Justice Strategic Plan Project #27." Report to the Board of Supervisors, Sonoma County. January 11, 2010. Page 38.

In some of the communities that Brion & Associates has worked with, child care is considered so important that child care impact fees have been adopted to help build child care facilities.

Every county in the State is required by legislation to have a local child care planning council and prepare a Needs Assessment every five years. In almost every Child Care Needs Assessment prepared by Brion & Associates, there has been an overall countywide shortage of child care. Statewide, while some wealthy cities or cities with high employment may have a slight surplus of child care relative to demand, most communities are woefully underserved with licensed child care.

Even where there is a surplus of child care, many families cannot afford it. For many families, child care costs comprise 20% to 40% of their gross income. For single female heads of household, the cost of child care often makes working impossible without the skills and education to secure a higher paying job.

This study addresses these issues and presents data and analysis pertaining to these topics.

Background

This study updates a study titled "Child Care Economic Impact Analysis for Sonoma County, California" prepared in 2002 for the Community Child Care Council of Sonoma County by the National Economic Development and Law Center (NEDLC) .[2] This study incorporates some general information on child care from the 2002 study. The NEDLC no longer exists, but its methodology is still widely used. We follow the general approach used by the NEDLC in the 2002 study, with refinements based on our broader experience in urban economic analysis, child care analysis, and Needs Assessments.

In addition to benefiting children and families, the child care industry positively impacts the economy of Sonoma County directly and indirectly. Annual gross receipts for child care in Sonoma County in 2002 were just over $91 million, resulting in an additional $16 million in additional economic activity countywide. This is nearly as much as local dairy industry receipts in the same year, and much higher than tourist industry receipts. In the same year, the local child care industry drew almost $30 million in State and Federal child care funds to Sonoma County, and licensed child care facilities created 2,412 full-time equivalent jobs.

Other industries supported by the child care industry include bookkeeping, tax compliance and audits, food, banking, real estate, and other suppliers to the child care industry.

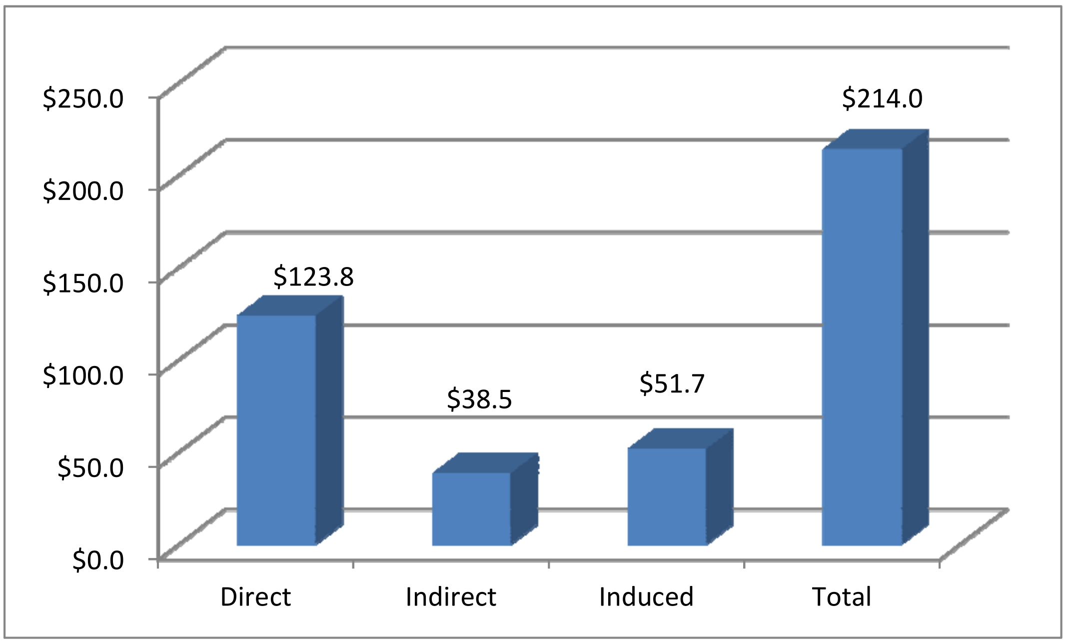
[2] The Community Child Care Council of Sonoma County has since been renamed the Child Care Planning Council of Sonoma County.

Summary of Findings

This section summarizes the key findings of the report. These findings are discussed further in **Chapter IV**.

1. In 2012, there is $123.8 million spent annually on child care in Sonoma County. This spending creates an additional impact of $90.2 million in the local economy, for a total impact of $214 million. For every direct dollar spent on child care, an additional $0.73 is generated in the local economy.

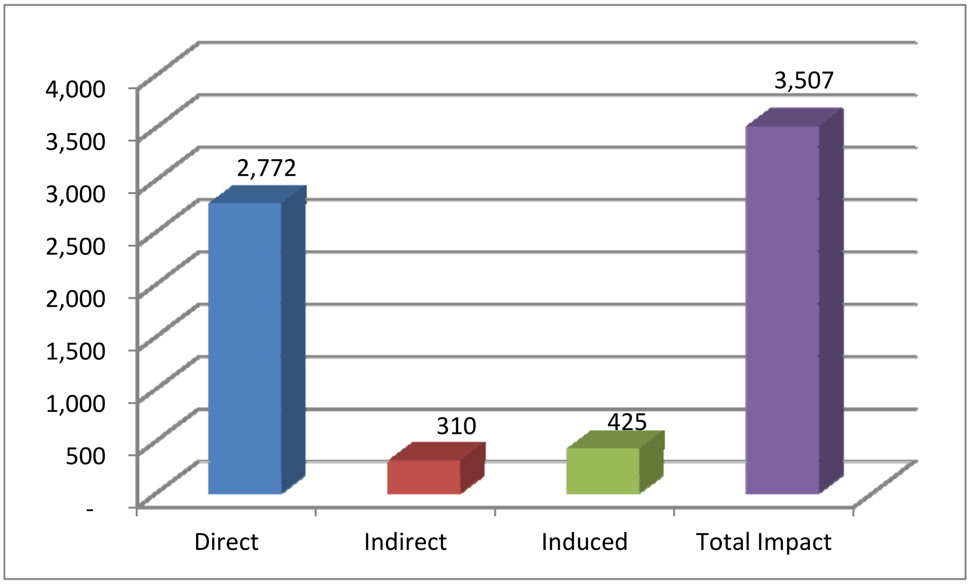
Figure S-1: Economic Multiplier Impact of Child Care on the Local Sonoma Economy (millions of dollars)



2. Based on the economic input/output analysis conducted for this study, this 2012 expenditure of $123.8 million supported total of 3,507 jobs countywide.

3. For every direct job in child care, an extra 0.26 job is created in the local economy. These jobs, in turn, support employment in other sectors, principally food services and drinking places as well as securities, commodity contracts, investments, and related activities.

Figure S-2: Employment Multiplier Impact of Child Care on Local Economy – Total Number of Jobs Supported



4. The dollars spent on child care impact the overall output of other sectors, principally real estate establishments and securities, and commodity contracts, investments, and related activities.

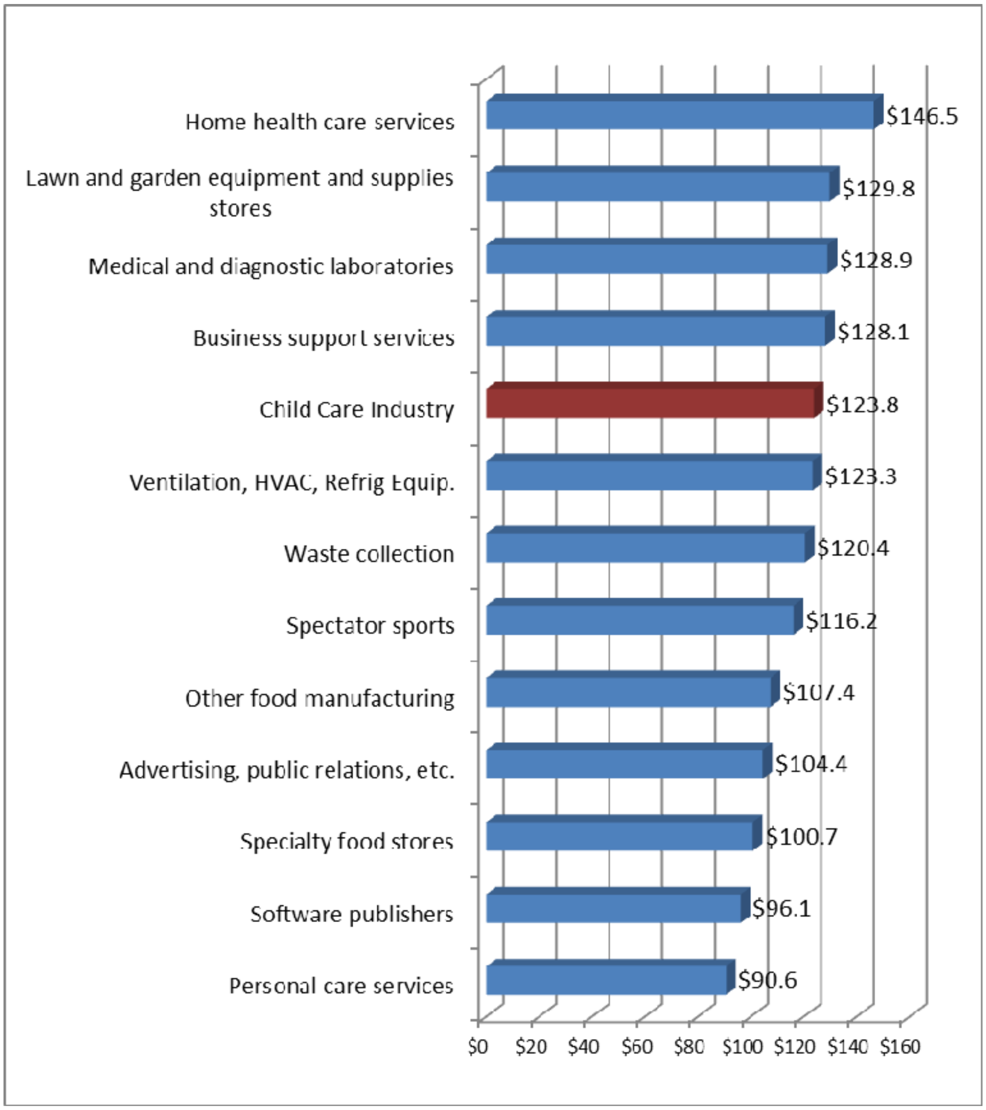
5. According to data from the Economic Census, the child care industry in Sonoma County generates more gross economic activity than the food manufacturing industry, HVC industry, the spectator sports industry, waste collection, personal care services, advertising and public relations, and software publishers.

6. Of 116 industrial sectors in the County, 47 have lower gross receipts than the child care industry, and 68 have higher gross receipts, according to data from the Economic Census. The largest industry in the County is fruit and vegetable processing (i.e. the wine industry and agriculture).

7. Child Care generates a wide variety of social economic benefits including reducing long term public spending on social services and criminal justice system costs. For every dollar invested in early child care, $2 to $4 in net present value benefits will be produced.[3]

[3] *The Economic Promise of Investing in High-Quality Preschool* published by the Committee for Economic Development in Washington DC.

Figure S-3: Industries Comparable to Child Care in Sonoma County (millions of dollars)



8. A recent study on the long term benefits of Early Care and Education found that for individuals at age 30:[4]

- Had significantly more years of education as compared to peers that were in the control group.

[4] "Benefits of High Quality Child Care Persist 30 Years Later." January 19, 2012. University of North Carolina at Chapel Hill website. Viewed on October 11, 2012.

- Were four times more likely to have college degrees, with 23% of participants having graduated from a four-year college compared to only 6% from the control group.[5]
- Completed college, which applied to both girls and boys, and is noteworthy according to lead researcher and co-author Elizabeth Pungello, Ph.D. given the "low rate of college gradation for minority males in our country."[6]
- Were more likely to have been consistently employed and less likely to have used public assistance.
- Had a tendency to delay parenthood by almost two years.
- Seemed to do better in relation to other social and economic measures (including higher incomes) but the results were not statistically significant.

9. As of 2012, the County has an estimated 487,000 residents, of which 15.5% are estimated to be children 0 to 12 years old.

10. There are an estimated 21,150 licensed child care spaces in Sonoma County, of which 6% serve infants, 41% serve preschool-age children, and 54% serve school-age children.

11. The demand for child care as of 2012 and countywide equals about 23,298 spaces with 12% in infant care, 33% in preschool care, and 56% in school age care.

12. Child care expenses represent a significant portion of family income. On average 25% to 33% of the typical family's expenses is spent on child care. For low-income single parents this percentage is even higher.

13. Wages in the child care industry are much lower than in other service industries in the County; the average wage is $12.37 per hour for FCCH child care workers and $14.38 per hour for Center-based child care workers.

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[5] "Benefits of High Quality Child Care Persist 30 Years Later." January 19, 2012. University of North Carolina at Chapel Hill website. Viewed on October 11, 2012.
[6] Ibid.

Figure S-4: Supply of Child Care by Age/Type in Sonoma County – 2012

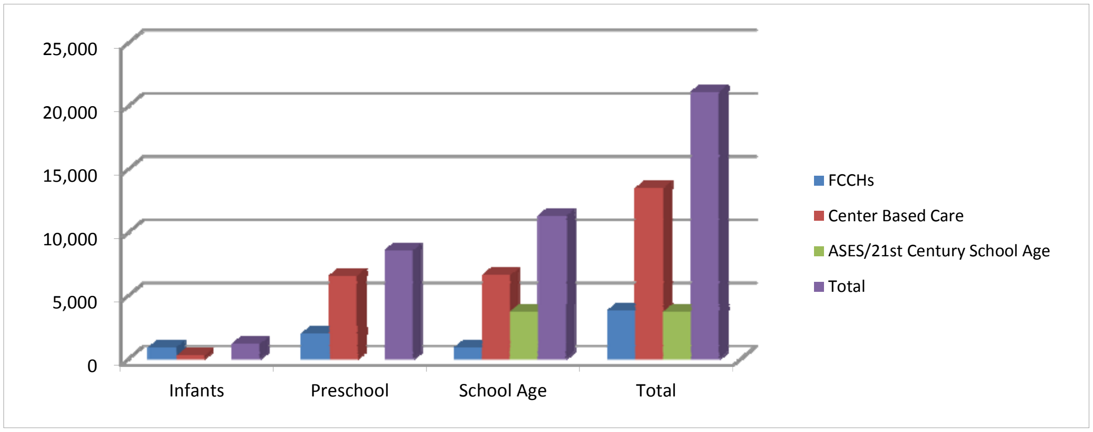
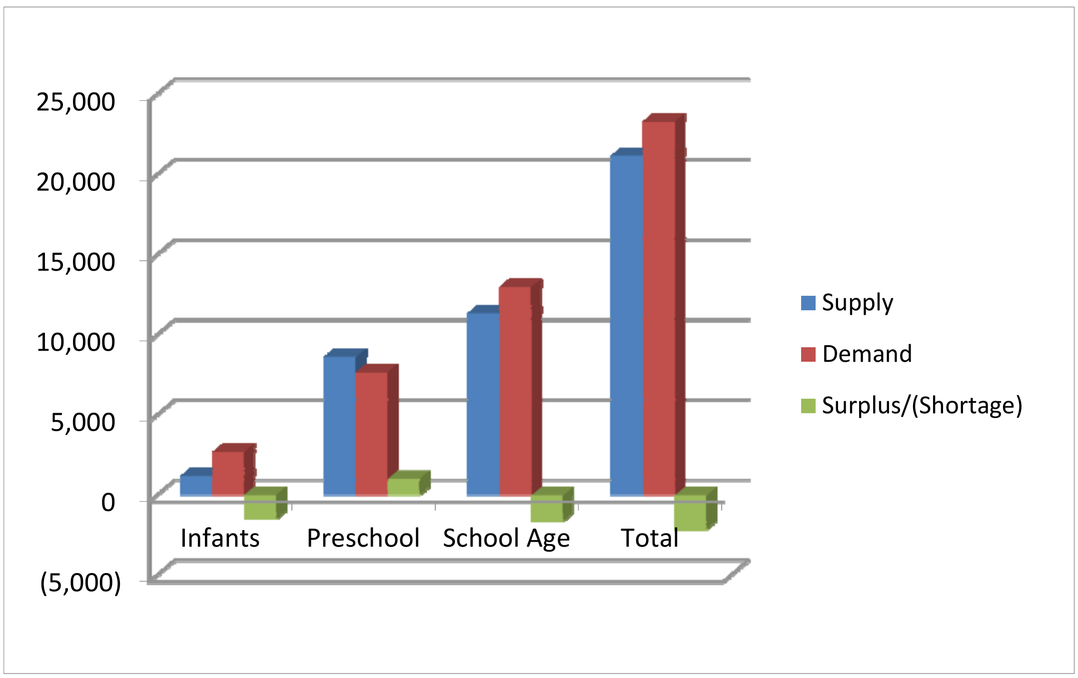


Figure S-5: Supply and Demand for Child Care in Sonoma County – 2012



Defining Child Care

Child care is provided in a wide range of facilities by a wide range of providers. This type of study generally focuses on formally licensed child care, but it should be noted that child care is also provided at home and in other informal settings by friends, relatives, or nannies.

Local planning councils for child care promote high quality child care in licensed environments and work diligently to improve the education and quality of teachers and providers with a variety of services, resources, and workshops and other events. In general there are several types of providers/facilities for child care.

- **Small and Large Family Child Care Homes** where children are cared for in someone's home. Small FCCHs can serve up to 8 children and large FCCHs can serve up to 14. Rarely do FCCHs serve the maximum number of children. These providers serve all age groups but tend to focus on infants, toddlers, and preschool children. This type of care is generally less expensive than formal child care center based care.

- **Child Care Centers** are located in commercial buildings, portable buildings or portions of commercial spaces or community spaces such as churches. Child care centers can be privately owned and operated, run by non-profits, by public or private schools, or by community organizations.

- **School Age** child care is offered by a variety of organizations and is typically located at school sites. School age child care often uses portable buildings added since the school was constructed. Generally this type of care is considered license-exempt. Other after-school care is provided by community organizations such as Boys & Girls Clubs, YMCAs, ASES/21st Century programs, and others. Some children receive before and after school care while others receive one or the other. As children reach the age of 9 or 10, they start to participate in more after school programs and sports, and need less and less formal child care.

- **Publicly funded child care** programs come in a variety of settings. Head Start programs are federally funded and serve low income preschool age children. The State of California provides subsidies for child care through contracts to child care providers. Depending on the subsidy type, parents must meet income threshold limits and need requirements (working or attending school) to qualify. In general there are never enough subsidy dollars to meet the need for subsidy.

- **Co-ops** are typically run by parents with a trained teacher or director and can provide care at a lower cost than formally licensed providers. This type of care is not as common, as most parents work full time and do not have the time or expertise to work in a co-op setting.

The State of California licenses child care providers and sets certain minimum staffing ratios through the Community Care Licensing Division (CCL) of the Department of Social Services (CDSS). These staffing requirements are used to estimate employment in the child care industry, but they are minimum requirements, not averages. Infant care has higher staffing ratios than preschool care; school age care has the lowest staffing ratios. The CCL also sets per-child indoor and outdoor space requirements for child care facilities. In general, under California Law, small FCCHs are allowed by right in single family and multi-family homes, and large FCCHs are allowed by right with review of parking, fire safety and noise.

Child care does not usually generate enough profit to fund newly constructed facilities, and is often reduced to locating in substandard commercial spaces, old houses, or church basements. About 85% of a child care provider's budget goes to labor, leaving very little funding for high quality buildings and spaces. For this analysis we focus on the direct annual operating impacts of the child care industry and not the capital improvement or development side.

Role of Local Child Care Planning Councils

The primary mission of the Local Child Care and Development Planning Councils (LPCs) is to plan for child care and development services based on the needs of families in local communities. LPCs are intended to serve as a forum to address the child care needs of all families in the community for all types of child care, both subsidized and non-subsidized. There are currently LPCs representing each county in California. (See Education Code, Chapter 2.3, Article 1, Section 8499 and Article 2, Sections 8499.3, 8499.5 and 8499.7.)[7] The responsibilities of LPCs include but are not limited to the following:

- Conduct an assessment of child care needs in the county no less than once every five years.

- Prepare local comprehensive countywide child care plans designed to mobilize public and private resources to address identified needs.

- Identify local funding priority areas for child care services, for General Child Care and Development Programs, for the State Preschool Program and for new state and federal funds.

[7] As reported at http://www.cde.ca.gov/sp/cd/re/lpc.asp.

- Conduct local forums to encourage public input in the development of local priorities.

- Foster local partnerships with subsidized and non-subsidized providers, local and state children and families commissions, county welfare departments, human service agencies, regional centers, job training programs, employers, parent organizations, early start family resource centers, family empowerment centers on disability, local child care resource and referral programs, and other interested parties.

- Coordinate part-day programs, including state preschool and Head Start, with other child care and development services to provide full-day child care.

- Design a system to consolidate local child care waiting lists.

Study Methodology and Approach

This report includes two types of analysis that Brion & Associates typically prepares for local planning councils and other child care related agencies and departments: an economic multiplier or impact analysis (i.e. Input/Output Analysis with IMPLAN software) and a supply and demand analysis. The following discussion summarizes the purpose and approach of each analysis; further discussion is included in the chapters where analysis methods and results are presented.

Economic Impact Analysis or Multiplier Analysis

The economic and employment impact analysis of the child care industry uses IMPLAN Version 3.0® software to analyze data from Sonoma County, and estimates of gross receipts for the child care industry. This is described in detail in **Chapter II**. The potential economic impact of any project or industry depends directly on the complexity of the local economy and the presence of the goods and services that an industry or activity requires. For example, a California sales tax initiative in the 1990s to fund mass transit had only a small multiplier effect, because very little mass transit equipment (i.e., trains, buses and ferries) is actually manufactured in California. In general, manufacturing has a broader economic multiplier effect than the activities of a dentist or some other type of customer service.

Input/Output analyses are generally prepared at the county level, as the IMPLAN model is structured at the county level. There are 440 industry sectors in the IMPLAN model for Sonoma County. The model's child care category is called "child day care services."

The model estimates direct, indirect, and induced economic impacts. Direct impacts include dollars spent on child care services by parents and subsidies provided by public agencies.

Indirect impacts are the spending caused by direct impacts on goods and services required by the child care industry, such as accountants, toys and food. Induced impacts are the impacts that wages and salaries paid to child care industry employees cause in the local economy, including spending on housing, food, services, and health care. This analysis reports economic activity in two ways:

- **Economic Effects** or Output: all economic activity including commodity inputs, labor income, property income, and other components.

- **Employment:** the number of jobs supported annually as a result of each impact.

Child Care Supply and Demand Analysis

This analysis compares the demand or need for child care to the current estimate of supply, estimated by number of licensed spaces by age or type of child care, typically infant, preschool, and school age. The ages served by each type of care can vary slightly, but generally infant care serves children from 0 to 1-2 years old; preschools serve children 3 to 5 years old; and school age care serves children 6 to 12 years old.

Child care demand or need is calculated in several steps using various assumptions and data. Starting with an estimate of child population in Sonoma County for 2012, we apply labor force participation rates to these estimates of working parents with children by age group, as discussed in **Chapter III**. This provides an estimate of the number of children with working parents. We know from surveys and other studies that not every child with a working parent or parents needs licensed child care, although this study, like most child care studies, focuses on licensed care. To account for this, we apply licensed child care demand factors by type of care to determine how many children require licensed care. This approach normally results in an overall demand rate for licensed care of 1 out of every 3 or 4 children. The remaining children are cared for by parents, families, friends, neighbors, nannies, and unlicensed child care providers.

This type of analysis is conducted by each county's LPC as part of the Needs Assessments which are required every five years. Brion & Associates has prepared many of these studies and our approach for this study is consistent with our past work and the work of others on the issue.

Data Availability and Potential Changes in Child Care Funding

This study uses existing data collected by other agencies as of summer 2012 and does not rely on primary data collection. To gather the information used in the study, we reviewed a variety of reports and documents and contacted people working in child care in the County. This study presents current County child care funding and expenditures as of 2012. Given California's recent budget crisis and consequent proposed reductions in child care funding, the funding levels presented here may not match the actuals at the end of Fiscal Year 2012/2013 budget.

Report Organization

This report is organized into four chapters including this chapter, which presents an introduction and findings. **Chapter II** presents an economic multiplier or impact analysis and describes current direct funding for child care from all sources, including families as well as local, state and federal subsidies. **Chapter III** analyzes the current supply and demand for child care in the County as well as County demographics, household income, and child care costs. **Chapter IV** presents the findings of the analysis and their implications for child care planning. Two appendices follow the report, and are listed in the **Table of Contents**.

II. Economic Impacts of Child Care Industry

This section analyzes the economic and employment effects of the child care industry on the local economy using IMPLAN Version 3.0® software and data for Sonoma County, California. Input/Output analyses are generally prepared at the County level, as the IMPLAN model is structured at the county level. This study does so as well, since we are analyzing benefits and impacts of the child care industry for Sonoma County's economy. **Table 1** summarizes the results of the economic multiplier analysis and discusses the approach, assumptions, and methodology used.

Overview of Economic Multiplier Analysis

The magnitude of the potential economic impact of any industry sector is in direct relation to the complexity of the local economy and the presence of the goods and services the industry sector requires. If a county does not have the goods and services required for a particular industry, this will lessen the economic impact. Manufacturing usually has a higher multiplier effect than services or retail because it requires more resource and labor inputs. There are 440 industry sectors in the IMPLAN model for Sonoma County. We based our calculations for this analysis on the Child Day Care Services sector. The analysis reports economic activity in two ways:

- **Economic Effects** or Output: all economic activity including commodity inputs, labor income, property income, and other components.
- **Employment:** the number of jobs supported annually as a result of each impact.

The multiplier impacts of each impact include direct, indirect, and induced impacts.

- **Direct Effects** represent the economic response for a given industry of final demand for that same industry, such as a change in employment.[8]
- **Indirect Effects** represents the economic response by all local industries caused by the new industry purchasing from other industries. For example, the number of jobs and other impacts that are generated throughout Sonoma County when the child care industry must purchase goods and labor in order to provide services.

[8] The set of expenditures applied to the predictive model (i.e., I/O multipliers) for impact analysis. It is a series (or single) of production changes or expenditures made by producers/consumers as a result of an activity or policy. Applying these initial changes to the multipliers in an IMPLAN model will then display how the region will respond, economically to these initial changes.

- **Induced Effects** represent the economic response of all local industries in Sonoma County caused by the expenditures of new household income generated by the direct and indirect effects of final demand for a given industry. These induced impacts most typically occur in retail and other local-serving industry categories such as education, health care, and personal services.

- **Total** is the total multiplier effect of a given economic activity, which is the sum of the direct, indirect, and induced effects. It represents the entire response of final demand.

In this analysis, two types of benefits are provided – output and employment. This analysis measures how every dollar spent or generated by the child care industry creates an additional economic benefit in the County.

Direct Impacts of Child Care Industry

This analysis calculates the multiplier impact based on industry output and employment. The impact is run on IMPLAN Professional for the child care sector. It is estimated that $123.8 million is spent annually in the child care industry in Sonoma County, as shown below in **Table 1**. About 22% of this amount comes from child care subsidies, 2% from child care agency and organization budgets, and the remaining 76% from families in the form of child care fees. This $123.8 million is the direct input used to estimate the economic impact of the child care industry. The results are discussed below and shown in detailed tables in **Appendix B** of this report.

Indirect and Induced Economic Activity

Our analysis finds that, for every dollar spent on in the child care industry, another $0.73 is spent in the local Sonoma County economy. We estimate, therefore, that the $123.8 million spent on child care generates an additional $90.2 million in economic activity (see **Table 1**). This $90.2 million represents $38.5 million in indirect effects and $51.7 million in induced effects. Together with the $123.8 million in direct effects, the indirect and induced economic activity produces a total impact on the local economy of $214.0 million.

Further, our IMPLAN analysis finds that the $123.8 million spent annually in the child care sector produces 2,772 jobs directly. This produces an additional 310 indirect jobs and 425 induced jobs. Therefore, every direct job in child care generates an additional 0.26 jobs in Sonoma County, for a total of 3,507 jobs based on child care spending in 2012.

Table 1
Summary of Economic Benefits - Input/Output Analysis
Sonoma County Economic Impact Report - 2012

Regional Economic Impacts	Economic Multiplier Analysis				Net Economic Impact	Multiplier Effect (1)
	Direct	Indirect	Induced	Total Impact		
	(in millions of dollars or total jobs)					
Child Care Annual Operations Benefits						
Revenue in Local Economy	$123.8	$38.5	$51.7	$214.0	$90.2	$0.73
Percent Distribution	58%	18%	24%	100%		
Permanent Annual Jobs	2,772	310	425	3,507	734	0.26
Percent Distribution		11%	15%		26%	

Note: *This analysis uses the IMPLAN input/output model data for Sonoma County as of 2010.*
The analysis uses the gross dollar volume of activity in the child care industry as the "input".
The results estimate the economic multiplier effect of the child care industry on the Sonoma County economy.

(1) For every $1 in direct spending an additional X dollars is generated;
for every one new direct job, an additional X job are generated.

Sources: 2010 Minnesota IMPLAN Group, Inc.; Child Care Planning Council of Sonoma County; Brion & Associates.

Table 2 summarizes the direct, indirect, induced, and total effects of the child care industry on output, employment, labor income, and total value added. Labor income is considered to be all forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income.[9] We estimate these effects at $60.1 million of direct labor income and $87.2 million of total income.

The top ten industries affected by employment in the child care industry are listed in **Table 3**. After child care, food services and drinking places receive the greatest benefit, followed by securities, commodity contracts, investments and related activities, and real estate services.

The top ten industries affected by output in the child care industry are listed in **Table 4**. After child care, real estate services receive the greatest benefit, followed by securities, commodity contracts, investments and related activities.

The ripple effects of the child care industry in Sonoma County affect numerous other industries and have a significant impact on the County's economy.

[9] Definition of labor income from the IMPLAN Group website's glossary. http://implan.com.

Table 2
Impact Summary of Effects of Child Care Services on Sonoma County Economy
Sonoma County Economic Impact Report - 2012

	Annual Benefits of Child Care Industry					
Impact Type	**Output**	**Employment**	**Labor Income**	**Percent of Output**	**Total Value Added**	**Percent of Output**
Direct Effect	$123,804,000	2,772	$60,111,000	49%	$77,488,000	63%
Indirect Effect	$38,452,000	310	$10,172,000	26%	$20,892,000	54%
Induced Effect	$51,726,000	425	$16,950,000	33%	$32,681,000	63%
Total Effect	$213,982,000	3,507	$87,233,000	41%	$131,061,000	61%

Sources: 2010 Minnesota IMPLAN Group, Inc.; Child Care Planning Council of Sonoma County; Brion & Associates.

Table 3
Top Ten Industries Affected by Employment in Child Care Industry in Jobs
Sonoma County Economic Impact Report - 2012

		Annual Benefits			
Sector	**Description**	**Total Annual Employment**	**Total Labor Income**	**Total Value Added**	**Total Output**
399	Child day care services	2,777	$60,208,489	$77,612,558	$124,004,015
413	Food services and drinking places	81	$1,751,985	$2,778,681	$5,027,991
356	Securities, commodity contracts, investments, etc.	76	$495,467	$637,374	$7,654,169
360	Real estate establishments	59	$1,196,280	$9,997,895	$11,548,497
382	Employment services	41	$1,174,252	$1,276,210	$1,599,148
388	Services to buildings and dwellings	26	$712,997	$939,010	$1,730,185
394	Offices of physicians, dentists, and other health practitioners	24	$1,824,096	$1,885,999	$3,019,784
368	Accounting, tax preparation, bookkeeping, and payroll services	17	$898,584	$1,276,186	$1,795,803
355	Non-depository credit intermediation and related activities	15	$1,058,718	$1,212,774	$2,183,407
324	Retail Stores - Food and beverage	15	$544,446	$782,724	$1,039,830

Sources: 2010 Minnesota IMPLAN Group, Inc.; Brion & Associates.

Table 4
Top Ten Industries Affected by Child Care Related Output in Dollars
Sonoma County Economic Impact Report - 2012

		Annual Benefits			
Sector	**Description**	**Total Output**	**Total Employment**	**Total Labor Income**	**Total Value Added**
399	Child day care services	$31,595,616	785.3	$11,855,810	$19,807,254
360	Real estate establishments	$2,580,405	18.9	$464,245	$2,013,737
361	Imputed rental activity for owner-occupied dwellings	$1,442,769	0.0	$0	$977,230
356	Securities, commodity contracts, investments, etc.	$1,296,579	8.4	$422,424	$430,407
357	Insurance carriers	$829,338	2.8	$204,527	$375,824
432	Other state and local government enterprises	$788,495	2.7	$228,848	$299,077
413	Food services and drinking places	$474,559	8.3	$169,635	$251,776
394	Offices of physicians, dentists, and other health practitioners	$427,997	3.5	$260,011	$299,635
354	Monetary authorities and depository credit intermediation activities	$413,764	1.9	$113,662	$296,897
382	Employment services	$412,029	16.1	$274,010	$297,401

Sources: 2010 Minnesota IMPLAN Group, Inc.; Brion & Associates.

To put the economic benefits in context, **Table 5** presents similarly-sized industry sectors in the County, based on data from the Bureau of Economic Analysis' Economic Census. The ventilation and heating industry has similar gross receipts, at about $123 million. Industries with slightly lower gross receipts include personal services, specialty food stores, advertising and public relations, waste collections and spectator sports. However, the Child Care industry overall represents less than one percent of gross economic activity in Sonoma County.

Table 5
Gross Receipts for Similar Sized Industries to Child Care
Santa Rosa-Petaluma, CA Metro Area
Sonoma County Economic Impact Report - 2012

Industry	Gross Receipts in Millions	Percent above or below Child Care Industry
Child Care Industry (1)	$123.8	
Comparable Industries in Gross Receipts (2)		
Personal care services	$90.6	73%
Software publishers	$96.1	78%
Specialty food stores	$100.7	81%
Advertising, public relations, and related services	$104.4	84%
Other food manufacturing	$107.4	87%
Spectator sports	$116.2	94%
Waste collection	$120.4	97%
Ventilation, heating, air-conditioning, and commercial refrigeration equipment manufacturing	$123.3	100%
Business support services	$128.1	103%
Medical and diagnostic laboratories	$128.9	104%
Lawn and garden equipment and supplies stores	$129.8	105%
Home health care services	$146.5	118%

(1) Based on estimated gross receipts shown in table 12.
(2) The data in this file come from separate 2007 Economic Census Industry Series, Geographic Area Series, and Summary Series data files and flow files from 2009 and 2011.

Sources: Bureau of Economic Analysis; Brion & Associates.

III. Economic Profile of Sonoma County

This chapter examines current demographics in Sonoma County and current demand and supply of child care in the County. It also discusses household and family income, wages and employment, and child care fees. The purpose of this analysis is to provide an overall picture of child care in the county including surpluses and shortages in supply; future demand; and issues of cost of care and affordability.

Current Demographics

Table 6 shows current population estimates for Sonoma County in 2010 and 2012 from the California Department of Finance (DOF). There are about 487,000 residents currently in Sonoma County, and about 205,400 housing units. The average household size in the County is 2.55 persons.

Table 7 summarizes population by age and gender from the 2010 Census. The U.S. Census data has been adjusted to account for growth in the County from 2010 to 2012. There are about 75,000 children ages 0 to 12 years old in Sonoma County in 2012, making them about 15.5% of the population. This is an important demographic indicator for child care planning efforts.

Table 6
Total Population, Households and Housing Units from CA Department of Finance
Sonoma County Economic Impact Report - 2012

	POPULATION			HOUSING UNITS								
COUNTY	Total	Household	Group Quarters	Total	Single Detached	Single Attached	Two to Four	Five Plus	Mobile Homes	Occupied	Vacancy Rate	Persons per Household
2012												
Sonoma	487,011	476,290	10,721	205,363	140,823	14,364	13,448	25,342	11,386	186,542	9.16%	2.553
2010												
Sonoma	483,878	473,835	10,043	204,572	140,376	14,325	13,421	25,086	11,364	185,825	9.16%	2.550
Change - 2010 to 2012	3,133	2,455	678	791	447	39	27	256	22	717	0.00%	0.003
Percent Change	0.65%	0.52%	6.75%	0.39%	0.32%	0.27%	0.20%	1.02%	0.19%	0.39%	0.00%	0.12%

(1) From the E-5 Report prepared by the California Department of Finance.
http://www.dof.ca.gov/research/demographic/reports/estimates/e-5/2011-20/view.php
as viewed on September 17, 2012.
Sources: CA Department of Finance; Brion & Associates.

Table 7
Population by Age and Sex for Sonoma County
from 2010 US Census
Sonoma County Economic Impact Report - 2012

Age	Number			Percent			Males per 100 females
	Both sexes	Male	Female	Both	Male	Female	
Total population (all ages)	483,878	237,902	245,976	100.0	100.0	100.0	96.7
Under 5 years	28,199	14,419	13,780	5.8	6.1	5.6	104.6
Under 1 year	5463	2,795	2,668	1.1	1.2	1.1	104.8
1 year	5504	2,769	2,735	1.1	1.2	1.1	101.2
2 years	5573	2,893	2,680	1.2	1.2	1.1	107.9
3 years	5945	3,043	2,902	1.2	1.3	1.2	104.9
4 years	5714	2,919	2,795	1.2	1.2	1.1	104.4
5 to 9 years	29263	14,967	14,296	6.0	6.3	5.8	104.7
5 years	5865	2,994	2,871	1.2	1.3	1.2	104.3
6 years	5881	3,051	2,830	1.2	1.3	1.2	107.8
7 years	5858	2,946	2,912	1.2	1.2	1.2	101.2
8 years	5776	3,007	2,769	1.2	1.3	1.1	108.6
9 years	5883	2,969	2,914	1.2	1.2	1.2	101.9
10 to 14 years	29724	15,176	14,548	6.1	6.4	5.9	104.3
10 years	5809	3,020	2,789	1.2	1.3	1.1	108.3
11 years	5905	2,973	2,932	1.2	1.2	1.2	101.4
12 years	5881	3,024	2,857	1.2	1.3	1.2	105.8
13 years	6,127	3,151	2,976	1.3	1.3	1.2	105.9
14 years	6,002	3,008	2,994	1.2	1.3	1.2	100.5
15 to 19 years	33,298	17,210	16,088	6.9	7.2	6.5	107.0
20 to 24 years	32,068	16,797	15,271	6.6	7.1	6.2	110.0
25 to 29 years	31,730	16,536	15,194	6.6	7.0	6.2	108.8
30 to 34 years	29,567	15,252	14,315	6.1	6.4	5.8	106.5
35 to 39 years	28,968	14,601	14,367	6.0	6.1	5.8	101.6
40 to 44 years	31,635	15,937	15,698	6.5	6.7	6.4	101.5
45 to 49 years	36,096	17,391	18,705	7.5	7.3	7.6	93.0
50 to 54 years	37,422	18,095	19,327	7.7	7.6	7.9	93.6
55 to 59 years	36,355	17,311	19,044	7.5	7.3	7.7	90.9
60 to 64 years	32,189	15,323	16,866	6.7	6.4	6.9	90.9
65 to 69 years	21,407	10,122	11,285	4.4	4.3	4.6	89.7
70 to 74 years	14,137	6,470	7,667	2.9	2.7	3.1	84.4
75 to 79 years	10,975	4,780	6,195	2.3	2.0	2.5	77.2
80 to 84 years	9,639	3,805	5,834	2.0	1.6	2.4	65.2
85 to 89 years	7,266	2,525	4,741	1.5	1.1	1.9	53.3
90 to 94 years	2,992	977	2,015	0.6	0.4	0.8	48.5
95 to 99 years	837	194	643	0.2	0.1	0.3	30.2
100 to 104 years	97	13	84	0.0	0.0	0.0	15.5
105 to 109 years	14	1	13	0.0	0.0	0.0	7.7
110 years and over	0	0	0	0.0	0.0	0.0	(X)

X Not applicable.
Source: U.S. Census Bureau. 2010 Census.
Summary File 1. Table PCT12.
QT-P2-Geography-Sonoma County,
2010 Census Summary File 1
NOTE: For information on confidentiality protection, nonsampling error, and definitions, see
http://www.census.gov/prod/cen2010/doc/sf1.pdf.
Sources: US Census; Brion & Associates.

Countywide Child Care Supply and Demand

Current Supply and Demand

There are two child care resource and referral agencies in the County: Community Child Care Council of Sonoma County (4Cs) and River to Coast Children's Services. River to Coast serves most of the West County, and 4Cs serves the remainder of the County. As shown in **Table 3**, there are a total of 739 child care facilities countywide, of which 418 are FCCHs, 206 are centers, and the remainder are school related programs. There are a total of 21,152 licensed child care spaces in the County.

In the 4Cs' service area there is a vacancy rate of 17% overall and 40% for FCCHs. In the River to Coast area there is an overall vacancy rate of 25%. There are 3,772 school age spaces at 55 school sites throughout the County. No vacancy data for this type of care is available. Including the ASES/21st Century program, the overall vacancy rate is 14%. In all areas, there is a significant amount of available child care. Most providers are having trouble finding parents that can afford child care. In some cases parents may not need child care because one parent is not working. While we estimate supply and demand based on total licensed care, keep in mind that not all available spaces are occupied by children.

Table 9 shows current demand and supply for child care as of 2012 in Sonoma County. Existing demand is calculated based on the estimated number of children in the County, multiplied by demand factors including parents' 2010 Labor Force Participation Rates and estimates of the need for licensed care by age group. The result represents the number of children with working parents that may need licensed child care. However, based on surveys and studies we know that not all children with working parents require or use licensed care. Thus, this is only the first step towards estimating demand. Labor Force Participation Rates (LFPRs) from the 2000 Census for the County are shown in **Table 9**. The Census collects LFPRs for parents of children in two age groups: 0 to 6 and 6 to 17. As shown, the LFPR for parents of children 0 to 6 years old is 65.7%; for parents of children 6 to 17 years old the LFPR is 74.9%. This reflects the fact that some women return to work after their children start school. We should also note that these factors are much higher than in 2000.

The percent of children requiring licensed care is then calculated by applying percentages based on other studies used by cities and counties, some that we prepared and some prepared by others. This ensures a realistic estimate of demand for licensed care.

Table 8
Summary of Supply by Age and Type of Child Care and Agency
Sonoma County Economic Impact Report - 2012

Facility Type	Facilities Count	Capacity	Vacancies	Vacancy Rate	Occupied Spaces
4Cs of Sonoma County					
Small Family Child Care	323	2,584	-		
Large Family Child Care	77	1,078	-		
Total Family Child Care	400	3,662	1,447	40%	2,215
Licensed Center - Infant	17	271	-		-
Licence Exempt Center - Infant	-	-	-		
Total Infant Centers	17	271	31	11%	240
Licensed Center - Preschool	141	6,125	-	0%	-
Licence Exempt Center - Preschool	7	344	-		
Total Preschool Centers	148	6,469	736	11%	5,733
Licensed Center - School-age	40	2,860	-	0%	-
Licence Exempt Center - School-age	47	3,521	-	0%	-
Total School-age Centers	87	6,381	630	10%	5,751
Total Spaces	**652**	**16,783**	**2,844**	**17%**	**13,939**
River to Coast Children's Services					
Small Family Child Care	10	80	21	26%	59
Large Family Child Care	8	112	35	31%	77
Total Family Child Care	18	192	56	29%	136
Licensed Center - Infant	1	4	3	75%	1
Licence Exempt Center - Infant	-	-	-		
Total Infant Centers	1	4	3	75%	1
Licensed Center - Preschool	7	140	52	37%	88
Licence Exempt Center - Preschool	-	-	-		
Total Preschool Centers	7	140	52	37%	88
Licensed Center - School-age					
Licence Exempt Center - School-age	7	261	40	15%	221
Total School-age Centers	7	261	40	15%	221
Total Spaces	**33**	**597**	**151**	**25%**	**446**
Total Sonoma County					
Small Family Child Care	333	2,664	21	26%	59
Large Family Child Care	85	1,190	35	31%	77
Total Family Child Care	418	3,854	1,503	69%	2,351
Licensed Center - Infant	18	275	3	75%	1
Licence Exempt Center - Infant	-	-	-	0%	-
Total Infant Centers	18	275	34	86%	241
Licensed Center - Preschool	148	6,265	52	37%	88
Licence Exempt Center - Preschool	7	344	-	0%	-
Total Preschool Centers	155	6,609	788	49%	5,821
Licensed Center - School-age	40	2,860	-	0%	
Licence Exempt Center - School-age	54	3,782	40	15%	221
Total School-age Centers	94	6,642	40	15%	221
ASES/21st Century School Age	55	3,772	-	0%	
Total Spaces w (ASES/21St)	**740**	**21,152**	**2,995**	**14%**	**14,385**

These data are as of summer of 2012.
Vacancy data is not available for all categories or age groups.
ASES/21st Century data is not available by area in the county and is county wide.
Sources: Sonoma County Child Care Planning Council; Community Child Care Council of Sonoma County (4Cs); River to Coast Children's Services; and Brion & Associates.

For this study we assume that, for residents, licensed child care is needed by:

- 37% of infants with working parents,
- 50% of preschool age children with working parents, and
- 42% of school age children with working parents.

Applying these assumptions, we arrive at the total number of children requiring licensed child care spaces. Other children are assumed to be cared for by other family members, friends, relatives, nannies, or unlicensed providers. However, it should be noted that the State Resource & Referral Agency assumes all children with working parents need licensed care. Thus the SRRA, or others using their methodology, may arrive at higher estimates of demand. Therefore, we consider our estimates to be fairly conservative.

As shown in **Table 9**, there are an estimated 11,038 infants; 23,247 preschool age children ages 2 to 5; and 35,445 children ages 6 to 12 in Sonoma County. Applying the LFPRs to these numbers results in an estimate of 7,257 infants, 15,284 preschool age children, and 41,258 school age children with working parents who may need licensed child care. This totals 53,242 children ages 0 to 12, or 70% of all children overall. Our licensed child care demand factors are then applied to these numbers to produce the number of children in each age group requiring licensed care. We estimate that a total of 23,298 children – 2,685 infants, 7,642 preschool age children, and 12,971 school age children – currently require licensed care in Sonoma County.

Current data on child care supply for 2012 was provided by the Sonoma County Child Care Resource & Referral Agencies and is shown in **Table 8.** Matching current supply with our estimate of demand, we find a shortage of 1,489 infant spaces; a surplus of 979 preschool spaces; and a shortage of 1,636 school age spaces. Thus, there is an overall shortfall of 2,146 child care spaces. It is important to note that the overall surplus or shortage is only a general indicator: school age spaces cannot address infant or preschool need and vice versa. Thus, true indicators of need or shortage of supply are the individual shortages or surplus by age group.

Table 9
Existing Child Care Demand and Supply: 2012
Sonoma County Economic Impact Report - 2012

SONOMA COUNTY		No. of Child Care Facilities	Child Care Demand & Supply as of 2012: 0 to 1 or Infants	2 to 5 or Preschool	6 to 12 or School Age	0 to 12 Year Olds
EXISTING DEMAND						
Estimated Total Children	(1)		11,038	23,247	41,258	75,543
Average Labor Force Participation Rates	(2)		65.7%	65.7%	74.9%	70.7%
Children With Working Parents			7,257	15,284	30,883	53,424
% Children Needing Licensed Care	(3)		37%	50%	42%	44%
Total Demand for Child Care Spaces			**2,685**	**7,642**	**12,971**	**23,298**
% Distribution of Total Demand			12%	33%	56%	100%
% of Total Children Needing Licensed Care			24%	33%	31%	31%
EXISTING SUPPLY	(4)					
Family Child Care Homes Supply	(5)					
Licensed for 8		333	666	1,332	666	2,664
Licensed for 14		85	255	680	255	1,190
Child Care Center Spaces		267	275	6,609	6,642	13,526
ASES/21st Century School Age		55	na	na	3,772	3,772
Current Child Care Spaces		**740**	**1,196**	**8,621**	**11,335**	**21,152**
Percent Distribution			6%	41%	54%	100%
EXISTING SURPLUS/(SHORTAGE)			**(1,489)**	**979**	**(1,636)**	**(2,146)**
Percent Distribution			69%	-46%	76%	100%

(1) Based on estimated number of children for Sonoma County from the 2010 Census, adjusted for population growth between 2010 and 2012, from CA Dept. of Finance. Between 2010 and 2012 there has been a .065% change in population. See Tables A-1 and A-2.
(2) Labor force participation rates are from the 2010 Census and include children with two working parents or single working parents. Rates vary by age, under over 6 years. For County total, represents the sum of all planning areas, which results in a slightly higher Labor Force Participation Rates for the under 6 category.
(3) Not all children with working parents are assumed to need licensed care: the assumptions - % - under each age category are used. The remaining children are assumed to be carec for by family members, nannies, friends, and unlicensed care. Percentages are based on a detailed review of 12 other child care studies, including impact fee studies.
(4) Data on child care supply provided by Community Child Care Council of Sonoma County (4Cs) and River to Coast Children's Services as of August 2012. Assumes 8 licensed spaces for Small FCCHs and 14 for Large FCCHs.
(5) FCCH spaces by age are broken down by licensing regulations and adjusted for desired capacity. It is assumed that for small FCCHs, 2 spaces are infant, 3 are preschool, and 1 is school age. For large FCCHs, it is assumed that 3 spaces are infant, 7 are preschool, and 2 are school age.

Sources: CA Dept. of Finance; US Census 2010; Community Child Care Council of Sonoma County; Community Child Care Council of Sonoma County (4Cs);River to Coast Children's Services; and Brion & Associates.

Child Care Affordability and Impact on Families

Household income can significantly affect a family's ability to afford child care. **Table 10** shows a breakdown of incomes in Sonoma County from the American Community Survey 2011, a division of the Census Bureau. The estimated median household income in Sonoma County is $73,946 in 2011 dollars. However, for households with children under 18, the median household income is $82,856, which is 12% higher. This higher median income for families with children is caused by many families with two working parents.

Further, this changes significantly when looking at single-parent households. For fathers with children under 18, median household income is $42,342, only 57% of the County-wide median.

For female head-of-households median income is even less at $30,510, only 41% of the median household income for the County.

Table 10
Median Family Income by Presence of Children Under 18 Years
Sonoma County Economic Impact Report - 2012

Family Type	Sonoma County 2011	
	Median Family Income	Percent of Total
Median family income in the past 12 months (in 2011 inflation-adjusted dollars) --		
Total:	$73,946	
Married-couple family --		
Total	$86,412	117%
With own children under 18 years	$82,856	112%
No own children under 18 years	$89,110	121%
Other family --		
Total	$43,181	58%
Male householder, no wife present --		
Total	$55,358	75%
With own children under 18 years	$42,342	57%
No own children under 18 years	$65,883	89%
Female householder, no husband present --		
Total	$38,687	52%
With own children under 18 years	$30,510	41%
No own children under 18 years	$43,793	59%

Source: U.S. Census Bureau, 2011 American Community Survey;
Brion & Associates.

In many child care studies we use data from the Family Economic Self-Sufficiency Standard. [10] The Self-Sufficiency Standard is created for each of the 58 counties in California as well as 35 other states. It measures the income a family of a certain composition in a particular county requires 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 complete picture of what families need to make

[10] The Family Economic Self-Sufficiency Standard is published annually for each county in California by Insight Center for Community Economic Development. The data is adjusted to 2011 dollars.

ends meet.[11] **Table 11** shows the Self-Sufficiency Standard for Sonoma County in 2011 for families with a single working parent and two working parents. The table compares the amount needed by each household type to the average household income of that type (two-parent, male head of household and female head of household).

Table 11
The Self Sufficiency Standard for Sonoma County: 2011 Dollars
Sonoma County Economic Impact Report - 2012

	Single Working Parent				Two Working Parents			
	Infant & Preschooler		Preschooler & School-age		Infant & Preschooler		Preschooler & School-age	
Item	**Cost**	**% of Total**	**Cost**	**% of Total**	**Cost**	**% of Total**	**Cost**	**% of Total**
Monthly Budget (1)								
Housing	$1,351	26%	$1,351	21%	$1,351	21%	$1,293	23%
Child Care	**$1,954**	**37%**	**$1,477**	**23%**	**$1,954**	**30%**	**$1,414**	**25%**
Food	$528	10%	$602	9%	$755	12%	$791	14%
Transportation	$288	6%	$288	4%	$547	8%	$524	9%
Health Care	$405	8%	$416	6%	$465	7%	$455	8%
Miscellaneous	$452	9%	$414	6%	$508	8%	$448	8%
Taxes	$1,183	23%	$967	15%	$1,235	19%	$982	17%
Earned Income Tax Credit (-)	$0	0%	$0	0%	$0	0%	$0	0%
Child Care Tax Credit (-)	($104)	-2%	($104)	-2%	($104)	-2%	($100)	-2%
Child Tax Credit (-)	($174)	-3%	($174)	-3%	($174)	-3%	($167)	-3%
Monthly Budget	**$5,882**	**112%**	**$5,236**	**80%**	**$6,536**	**100%**	**$5,640**	**100%**
Annual Self-Sufficiency Budget (1)	**$70,584**		**$62,836**		**$78,432**		**$67,680**	
Required Hourly Wage per Adult	$33.42		$29.74		$18.57		$16.74	
Child Care as % of Total Mo. Budget	33%		28%		30%		25%	
Estimated Median Household Income in 2011 (2)								
Male, Head of Household	$42,342		$42,342					
Female, Head of Household	$30,510		$30,510					
Two Working Married Parents					$82,856		$82,856	
Amount Above or Below Self-Sufficiency								
Male, Head of Household	($28,242)	-40%	($20,494)	-33%				
Female, Head of Household	($40,074)	-57%	($32,326)	-51%				
Two Working Married Parents					$4,424	6%	$15,176	22%

(1) From Insight - Center for Community Economic Development
Self-Sufficiency Standard for California & Self-Sufficiency Calculator for Sonoma County, inflated from 2008 to 2011 dollars.
http://www.insightcced.org/calculator.html on September 29, 2012
http://www.bls.gov/data/inflation_calculator.htm on September 29, 2012
(2) See Table 5 for family income data.
Sources: Insight - Center for Community Economic Development; Brion & Associates

As shown, single parent households with an infant and preschooler are assumed to need a monthly income of $5,882, or annual income of $70,584, to purchase housing, child care, food, transportation, health care, and other basic necessities. Single mother households earn, on

[11] From the Insight Center for Community Economic Development's website as viewed on September 29, 2012. http://www.insightcced.org/calculator.html.

average, only 43% of this amount. For single father households, average earnings are 60% of this amount. Both types of single-parent household fall significantly short of the salary assumed to be needed to meet basic needs. For families with a preschooler and a school-age child, monthly expenses are assumed to be slightly less at $5,236 per month or $62,836 annually. However, single parent households fall below this amount as well. Regardless of the age of children, the average single parent household does not earn enough to sustainably meet basic needs.

In Sonoma County, the average household with two working parents earns more than the basic estimated amount, by 6% for families with an infant and preschooler and by 22% for families with a preschooler and school age child. Affordability of child care is of greatest concern to single working parents, many of whom likely require subsidized child care in order to work.

Child Care Wages and Workforce Data

Table 12 shows wages for different industry sectors in Sonoma County for the second quarter of 2011, according to the EDD. The highest average salary, at approximately $5,490 per month, is in the manufacturing sector. Using an average of $12.06 per hour for a child care worker, child care workers earn an average of $2,074 monthly. Child care management workers earn an average of $22.61 per hour, or $3,889 monthly. Although child care is considered a service industry, child care workers earn only 60% of the average wage for service workers. A child care manager earns just 5% more than the average worker, but only 42% of the average manager's wage.

The Child Care Planning Council conducted a Child Care Workforce Survey in 2011. They collected 649 survey responses, representing a 31% response rate, which is considered an excellent response rate. Survey results on average wages, wages by type of care, and wages by education level are presented below.

Average Income of Child Care Provider/Director by Type of Care

- Family Child Care Providers - $16,500 to $23,000 per year
- Center Based Providers – $26,000 to $40,000 per year

Average Wages per Child Care Worker

- Family Child Care Worker - $8,600 to $11,600 per year
- Center Based Child Care Worker - $21,168 to $3,333 per year

Table 13 presents the distribution of income for child care management by income range, from the workforce survey. As shown, center directors are paid higher wages than family child care providers. This is due in part to higher education levels for center directors based on licensing requirements.

Table 12
Current Average Wages by Sector in Sonoma County: 2011 (1)
Sonoma County Economic Impact Report - 2012

Major Industry Title		**Number Establish-ments**	**Average Monthly Employ-ment**	**Total Annual Payroll ($1,000)**	**Average Weekly Pay**	**Average Monthly Pay (2)**
Private Ownership:						
Total, all industries		18,399	151,970	$6,745,409	$854	$3,701
Goods-Producing		3,016	34,770	$1,961,919	$1,085	$4,702
Natural Resources and Mining		575	5,971	$171,998	$554	$2,401
Construction		1,634	8,589	$458,853	$1,027	$4,450
Manufacturing		807	20,209	$1,331,068	$1,267	$5,490
Service-Providing		15,383	117,200	$4,783,490	$785	$3,402
Trade, Transportation, and Utilities		2,373	32,502	$1,262,391	$747	$3,237
Information		161	2,466	$148,790	$1,160	$5,027
Financial Activities		1,157	7,586	$430,103	$1,090	$4,723
Professional and Business Services		2,096	21,004	$1,057,108	$968	$4,195
Education and Health Services		1,505	24,042	$1,247,772	$998	$4,325
Leisure and Hospitality		1,268	20,405	$381,511	$360	$1,560
Other Services		6,051	8,438	$226,148	$515	$2,232
Unclassified		773	758	$29,668	$752	$3,259
Government Ownership:						
Federal Government		65	1,557	$98,094	$1,212	$5,252
Local Government		282	19,604	$972,326	$954	$4,134
State Government		161	4,091	$199,279	$937	$4,060
Child Care Worker						$2,074
Child Care - Management						$3,889

Child Care Worker as % of All Industries	56%
Child Care Management as % of All Industries	105%

(1) Data is from California Economic Development Department, Labor Market Information.
http://www.labormarketinfo.edd.ca.gov/qcew/CEW-Major_NAICS.asp on September 29, 2012
(2) Assumes 4.3 weeks per month on average.

Sources: EDD; Brion & Associates.

Table 13
Annual Income Range of Child Care Management (1)
Sonoma County Economic Impact Report - 2012

Income Range	FCC Providers	Center Directors
$0 to $8,600	24%	3%
$8,601 to $11,600	10%	2%
$11,601 to $16,500	17%	2%
$16.501 to $23,200	15%	2%
$23,201 to $26,200	8%	5%
$23,1001 to $35,000	14%	36%
$35,001 to $40,000	2%	24%
$40,001 to $45,000	2%	7%
$45,001 to $50,000	5%	5%
$50,000 to $55,000	1%	7%
$55,001 to $60,000	0%	2%
$60,001 to $75,000	1%	5%
$75,000 and Greater	2%	2%

Note: Figures may add up to slightly more than 100 due to rounding.
(1) From "Sonoma County Early Childhood Education Professional Workforce Survey: 2010"
Prepared by LFA Group.

Child Care Subsidies

Table 14 summarizes current child care subsidies available to children in the County in 2012. There are 10 types of child care subsidies or programs. As shown, estimated subsidies total $29.6 million. This is down slightly from over $30 million in 2008. About 23% of this funding comes from the federal government through the Head Start and Early Start programs. The next largest contributor is school age subsidies through the ASES/21st Century programs, which provide 19.5% of funding. This is followed by State Preschool at 18.5%. Together these three programs make up over 60% of subsidies.

Table 14
Estimated Child Care Subsidy Funding in Sonoma County - 2012
Sonoma County Economic Impact Report - 2012

Child Care Subsidy Program Name	**Total Estimated Funding by Program** *(rounded $1000)*	**Percent Distribution**
Center Based Care	$1,139,994	3.8%
FCCH Ed Networks	$1,832,217	6.2%
CalWORKS Stage 1	$3,842,194	13.0%
CalWORKS Stage 2	$3,074,015	10.4%
CalWORKS Stage 3	$761,671	2.6%
Alternative Payment Care	$540,208	1.8%
State Preschool	$5,475,240	18.5%
Head Start and Early Head Start	$6,949,310	23.5%
Tribal Funded	$226,810	0.8%
ASES/21st Century	$5,777,622	19.5%
Total Funding - All Programs	**$29,619,281**	100.0%

Provided by Carol Simmons, Child Care Coordinator, Sonoma County (August 2012).
Sources: Sonoma County Child Care Planning Council; and Brion & Associates.

Child Care Fees and Gross Annual Economic Activity

This section provides data on current average child care costs by type of care (FCCH or Center) and provider, based on information provided to the Sonoma County resource and referral agencies by child care providers. These costs are important in and of themselves, but they are also used to estimate the total annual dollar value of the child care industry in the County, which is needed for the economic impact analysis.

The average monthly cost of child care by age group and type of care is shown at the top of **Table 15**. Infant care is the most expensive type, at $910 for FCCH care and $1,014 for center-based care. Monthly preschool costs average $849 at FCCHs and $790 at centers. School age care is the least expensive because the care is part-day; it averages $760 for FCCH care and $587 per month for center-based care. However, license-exempt school age care can cost less than this.

These average monthly rates are applied to our estimate of occupied child care spaces by age and type to produce an estimate of $123.8 million in total parent fees in the County for the year. Of these expenditures, 4% go to infant care, 58% to preschool and 37% to school age care. Some of this is paid for by subsidies, which total $29.6 million per year as discussed above. Thus, after accounting for subsidies, total parent fees are estimated at $94.2 million per year.

Table 16 summarizes estimated child care industry gross revenues in Sonoma County. As discussed above, total parent fees are estimated at $94.1 million. Child care subsidies total about $29 million, producing total gross annual activity of $123.8 million. This economic activity is used as the “input” into the economic multiplier analysis discussed in **Chapter II**.

Table 15
Estimate Annual Child Care Gross Revenues -Non-Subsidized - 2012
Sonoma County Economic Impact Report - 2012

	Type of Care			
	Infant Care	**Preschool Age**	**School-Age**	**Total, All Types of Care**
Average Child Care Monthly Fees				
Licensed Family Child Care Provider Homes	$910	$849	$760	na
Licensed Centers	$1,014	$790	$587	na
Occupied Supply of Child Care Supply				
Family Child Care Provider Homes (1)	235	1,646	470	2,351
Child Care Centers	241	5,821	5,972	12,034
Total Supply of Child Care	476	7,467	6,442	14,385
Estimated Parent Fees per Year				
Licensed Family Child Care Provider Homes	$2,567,292	$16,766,392	$4,288,224	$23,621,908
Licensed Centers	$2,932,488	$55,183,080	$42,066,768	$100,182,336
Total Child Care Annual Fees	**$5,499,780**	**$71,949,472**	**$46,354,992**	**$123,804,244**
Percent Distribution	4%	58%	37%	100%
	227	2,084	857	3,168
Subsidized Care in Spaces				**$29,619,281**
Subsidized Care in Value				
				$94,184,963
Adjusted Gross Child Care Operating Revenue, Countywide				

	Infants	Preschool	School Age	Total
(1) Distribution of Family Child Care Home Spaces	10%	70%	20%	100%
Includes a current	39% vacancy rate for FCCHs			

Sources: Sonoma County Child Care Planning Council; Community Child Care Council of Sonoma County (4Cs); River to Coast Children's Services; and Brion & Associates.

Table 16
Total Gross Economic Activity Related to Child Care
Sonoma County Economic Impact Report - 2012

Type of Expenditure	Amount	Percent Distribution
Private Child Care Fees per Year	$94,184,963	76%
State and Federal Child Care Subsidies	$27,421,983	22%
Local Child Care Agencies (1)	$2,197,298	2%
Total Direct Expenditures on Child Care	**$123,804,244**	**100%**

(1) Includes Local Planning County, First 5 and other public agencies with budgets that serve children related to Child Care including the 4Cs and River to Coast budgets.

Sources: Sonoma County Child Care Planning Council; Community Child Care Council of Sonoma County (4Cs); River to Coast Children's Services; and Brion & Associates.

IV. Child Care and Socio-Economic Benefits

This study focuses on the economic impacts of the child care industry to Sonoma County. The study presents two important sets of information. The first characterizes the child care field, providing current demographics, supply and demand for child care, affordability data, and employment and wage information. The second set of information and analysis is the economic multiplier effect of the child care industry and how this effect ripples through the County's economy. These two quantitative chapters present very important information regarding the benefits of child care. However, there are additional qualitative benefits, which are the focus of this chapter.

Socio-Economic Benefits

Child care is a core component of a healthy and vibrant economy. It not only provides a critical service to working parents allowing them to function in the workforce, it provides children with developmental and social skills early in life which lead to more success in school and throughout their lives. Furthermore, the industry generates additional multiplier benefits to the economy as discussed above.

The 2002 study prepared for the Child Care Planning Study outlined a number of key areas that child care directly benefits. These include:[12]

- Expanding local labor force participation by enabling people to work. This contributes to increased output, greater personal income, more business formation, and higher revenues from local taxes.
- Increasing productivity and retention of employees in businesses in the County.
- Reducing future local expenditures on social needs by lowering the drop-out rates and crime rates and decreasing special education and welfare cost.
- Cultivating Sonoma County's future workforce by improving the cognitive skills and emotional well-being of children and ensuring that they enter school ready to learn.
- Capturing more federal and state child care subsidies, which in addition to bringing new dollars into the local economy, make child care more affordable to Sonoma County workers.

[12] See "The Economic Impact of the Child Care Industry in Sonoma County" prepared for the Community Child Care Council of Sonoma County by National Economic Development and Law Center (2002) page27.

All of these statements are still true and relevant. Assuming that most of the demand for child care is work-related, about 14,000 children in Sonoma County have parents that are able to work because they have their children enrolled in local licensed child care. There is another large group of parents that use unlicensed care that is not quantifiable. There are currently 540 infants, 2,176 preschoolers, and 609 school age children waiting for subsidized child care in the County.[13] For many parents, market rate child care is out of their reach financially. Currently there are approximately 3,000 children receiving some type of child care subsidy in the County.

Socio-Economic Benefits and Quality of Life

In January 2010, Sonoma County Board of Supervisors commissioned a report entitled "Upstream Investments to Reduce Long-Range Demand for County Criminal Justice Strategic Plan Project #27" (*Upstream Investments*). The purpose of this report was to "understand the antecedents to criminal behavior and to identify upstream interventions that reduce downstream criminal justice costs."[14]

The team that worked on *Upstream Investments* conducted a literature review and two main themes regarding upstream interventions became apparent. First, that ensuring protective factors for children builds resilience, and second, the most effective ways to ensure protective factors and build resilience are through early childhood interventions.[15] Based on these two themes, the team worked to identify upstream interventions for Sonoma County that could be effective and cost-effective.[16]

Per Upstream *Investments*, both academic researchers and economists agree that early childhood interventions are the "most effective options to reduce entry to and long term involvement in the criminal justice system."[17] The report cites the importance of early childhood, from birth to age 5, as a critical time in a child's development. To support this argument, the report quotes Robert Dugger of the Tudor Investment Corporation who argues, "From the time of conception to the first day of kindergarten, development proceeds at a pace exceeding that of any subsequent stage of life. It is during this time that the brain undergoes its most dramatic growth, and children acquire the ability to think, speak, learn and reason. Early experiences can and do influence the physical architecture of the brain, literally shaping the neural connections in an infant's developing brain."[18]

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[13] Data provided by Lori Siebler, Community Child Care Council of Sonoma County, October 10, 2012 via email.
[14] "Upstream Investments to Reduce Long-Range Demand for County Criminal Justice Strategic Plan Project, #27." Report to the Board of Supervisors, Sonoma County. January 11, 2010. Page i.
[15] Ibid. Page 33.
[16] Ibid.
[17] Ibid, Page 37.
[18] Ibid.

The argument for and support of quality early childhood education recognizes this critical period in a child's life and the impact it has on an individual's future. Ability gaps between the advantaged and disadvantaged show up early and, according to James Heckman, an economist at the University of Chicago. “Life cycle skill formation is dynamic in nature. Skill begets skill; motivation begets motivation. If a child is not motivated or stimulated to learn and engage early on in life, the more likely it is that when the child becomes an adult [he/she] will fail in social and economic life. The longer we wait to intervene in the life cycle of the child, the more costly it is to remediate.”[19] Based on this and other literature reviewed in the Upstream Investments report, the argument is made that “dollars invested in early childhood development yield extraordinary returns and pay big dividends to society including increased skill in the workforce, improved health, and reduced crime. A key difference between early childhood investments and investments at primary and secondary education levels is the potential for compounding. That is, enhancing early childhood development appears to improve a child’s ability to learn at later stages.”[20]

After conducting their literature review, the report team looked at cost benefit analyses to document the cost of early childhood interventions. The report quotes Temple, a professor at the University of Minnesota who states “Unlike a decade ago, scientific support for the benefits of preschool programs is strong. A major conclusion from these findings for early childhood policy is that for the first time a critical mass of evidence exists that preschool programs have comparatively high levels of cost-effectiveness.”[21] Findings 3b and 3c of *Upstream Investments* are most relevant to the importance of investing in high-quality early childhood education.

Finding 3b states:

> *The preponderance of the evidence confirms that early childhood interventions yield a tremendous benefit to individuals, children and families. When targeted to at-risk children and families, early childhood interventions reduce crime, substance abuse, child abuse, and welfare dependency, and they improve educational attainment, health outcomes, and income.*

Finding 3c states:

> *Investing in early childhood interventions aligns with approaches recommended and implemented by First 5, the Innovation Council, the Mental Health Services Act, and Health Action. In the past five years, First 5 has invested $21 million in early childhood interventions to improve the health and school readiness of children from*

[19]“Upstream Investments to Reduce Long-Range Demand for County Criminal Justice Strategic Plan Project #27.” Report to the Board of Supervisors, Sonoma County. January 11, 2010. Page 38.
[20]Ibid.
[21]Ibid, Page 43.

birth to age five in Sonoma County. In 2009-2010, Sonoma County will invest $500,000 through the Mental Health Services Act for prevention programs.[22]

Per the *Upstream Investments* report, representing an economist perspective, Kilburn of the RAND Corporation (2008) clearly articulates the rationale for early childhood investments. "Previous arguments for public support of early childhood programs focused on equity, promoting individual well-being, and spillover benefits to the rest of society. Cost benefit analysis have provided evidence that early childhood programs have the potential to save government money in the long run. These findings moved early childhood policy from being strictly a social-service policy and philanthropic endeavor to an economic-development strategy. Economic research promotes a reorientation of child and human services toward investment and prevention, in contrast to the current approach of attempting to 'treat' poor outcomes that manifest themselves later in the life cycle. Shifting toward a paradigm in which resources are invested in early human capital might produce better outcomes, save taxpayers money, and improve the quality of life for the people in whom we as a society invest."[23]

Marion Wright Edelman, writing for the Children's Defense Fund, gives a moral and ethical argument arguing "States spend on average nearly three times as much per prisoner as per public school pupil. In some states, the growth of prison costs exceeds the growth in higher education spending. What a wrongheaded investment policy. We call for a fundamental paradigm shift in child policy and practice away from the too frequent first choice of punishment and incarceration to prevention and early intervention and sustained child investment. Right now, the only thing our rich nation will guarantee every child is a jail or detention cell after s/he gets into trouble, fails in school, becomes a child parent or explodes in rage from undiagnosed and untreated health and mental health, neglect and abuse problems."[24]

In 2009 the Bay Area Council published a study, "Key to Economic Success in the 21st Century: Investment in Early Childhood Programs" which looks at the benefits and highlights the importance of quality early childhood education for the Bay Area. According to the study, the local economy will demand a highly educated, skilled, and flexible workforce.[25] The study argues that providing high-quality early care and education (ECE) has the potential to closing achievement gaps and increasing the success of future generations of workers. It is known that as early as when children begin kindergarten, there are already significant achievement gaps

[22] "Upstream Investments to Reduce Long-Range Demand for County Criminal Justice Strategic Plan Project #27." Report to the Board of Supervisors, Sonoma County. January 11, 2010. Page 60.
[23] "Upstream Investments to Reduce Long-Range Demand for County Criminal Justice Strategic Plan Project #27." Report to the Board of Supervisors, Sonoma County. January 11, 2010. Page 61.
[24] Ibid.
[25] "Key to Economic Success: Investment in Early Childhood Programs," Bay Area Council, May 2009.

between disadvantaged and affluent children.[26] Some reasons for this are based on research in brain development which shows that the human brain achieves 90% of postnatal grown between birth and age three and continues to rapidly grow during the preschool years. Therefore, the learning that takes place during the early ages greatly affects the foundation children have for future development, cognitively and emotionally.[27]

Another point raised in the study based on research by W. Steven Barnett (an expert in the costs and benefits of ECE), states that one-third of upper-middle-income children and one-fourth of middle-income families also come to kindergarten without “key pre-literacy skills.”[28] This further supports the importance of quality ECE for all children, regardless of economic background, prior to entering kindergarten, that can provide many benefits including curiosity, self-confidence, self-control, motivation, group identification, goal orientation, and a love for learning.[29]

Further support for ECE comes from data that is summarized in the Bay Area Council's report that shows that children who attend high-quality ECE programs are less likely to require special education, are less likely to repeat classes while in school, and are less likely to drop out of high school. Subsequently, students that graduate are more likely to go on to college. Additionally, girls are less likely to become pregnant as teenagers and as adults, these children are less likely to commit crimes or become incarcerated. All of these improvements allow taxpayers to avoid substantial costs and the increased earnings of those who have received high-quality early care and education also yield higher tax revenue.[30]

It is pertinent to note, that not all early care is high-quality care. The Bay Area Council's study cites various factors that make a program “high-quality,” with one of the key factors being the educational background and experience of teachers. In California, many ECE teachers and directors do not have BA degrees. However, given the low compensation that ECE professionals receive it can't be expected that there will be ECE professionals with higher education.

Access to high-quality ECE in the Bay Area is also a factor of cost. The study states that for lower-income families, care can cost over 27% of a family's income.[31] Additionally, current state assistance is not adequate to cover the number of families’ eligible for assistance (only

[26]Ibid.
[27]Ibid.
[28]Ibid.
[29]Ibid.
[30]Ibid.
[31]Ibid.

one-third of eligible families receive assistance) and the amount of assistance offered doesn't cover the cost of high-quality ECE.[32]

The Bay Area Council's study concludes by stating the benefits to families, employers, tax payers, and society as a whole, that are a result of high-quality ECE, which arguably offset the expenditures necessary to provide high-quality ECE and provide one of the highest returns of investment of publicly spent funds.[33]

Potential Future Cost Savings in Public Services

The benefits of early child care, especially quality preschool programs, are well documented. Studies have shown that children who participate in such programs are more likely to graduate from high school and college, less likely to become involved in criminal activity later in life, more likely to be employed, and less likely to depend on public assistance programs. According to the Committee for Economic Development[34]:

- For every dollar invested in early child care, $2 to $4 in net-present value benefits will be produced.
- Governments will spend less time and resources on remediation, incarceration, and welfare, positively affecting their overall budget if there is quality early child care.
- For every preschool dollar spent, states are projected to recoup 50 to 85 cents in reduced crime costs and 36 to77 cents in school savings.

Providing quality early child care for all children is a costly endeavor but is less costly in the long run than not investing in it because of later ramifications. It is important for the economic well-being of the Country.

The National Institute for Early Education Research estimates that for every dollar invested, the return is $7, based on the reduced costs of remedial education and justice system expenditures, and on the increased earnings and projected tax revenues for participants.[35] Overall they estimate the average benefits from a universally accessible program at ages 3 and 4 to be at least $25,000 per child, substantially more than the costs.[36]

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[32] Ibid.

[33] Ibid.

[34] *The Economic Promise of Investing in High-Quality Preschool* published by the Committee for Economic Development in Washington DC.

[35] From the National Institute for Early Education Research website: http://nieer.org/resources/facts/index.php?FastFactID=6.

[36] Ibid.

Therefore, while the child care industry generates significant direct benefits and multiplier effects in the County, it also has the potential to save the County money that would be put to better use in education, libraries, infrastructure, and other cultural/arts programs. This study demonstrates how important child care is to the Sonoma County economy, but also how important it is to one of our most precious resources, our children.

Demonstrated Long-Term Benefits of High Quality Care

In January 2012, new results were published from The Carolina Abecedarian Project run by the FPG Child Development Center at the University of North Carolina at Chapel Hill.[37] This long-running, carefully controlled scientific study examines the potential benefits of early childhood education for children from low-income families who were at risk of developmental delays or academic failure. Participants attended a full-time child care facility that operated year-round, from infancy until they entered kindergarten. Throughout their early years, the children were provided with educational activities designed to support their language, cognitive, social and emotional development.[38,39] The study separated children born between 1972 and 1977 into four cohorts and children were randomly assigned as infants to either a control group or the early educational intervention group.[40] There were 111 children, 98 percent African-American who participated in the study and 101 of them participated in the 30 year follow up study.[41] Children who were selected for the study:

- Were children from low-income families received full-time, high-quality educational intervention in a childcare setting from infancy through age 5.
- Had an individualized prescription of educational activities.
- Had educational activities consisted of "games" incorporated into the child's day.
- Participated in activities which focused on social, emotional, and cognitive areas of development but gave particular emphasis to language.

[37] Entire study “Adult Outcomes as a Function of an Early Childhood Educational Program: An Abecedarian Project Follow-up” was published in “Developmental Psychology” on January 18, 2012.
[38] The Carolina Abecedarian Project website, http://projects.fpg.unc.edu/~abc/. Viewed on October 11, 2012.
[39] “Benefits of High Quality Child Care Persist 30 Years Later.” January 19, 2012. University of North Carolina at Chapel Hill website. Viewed on October 11, 2012.
[40] The Carolina Abecedarian Project website, http://projects.fpg.unc.edu/~abc/. Viewed on October 11, 2012.
[41] “Benefits of High Quality Child Care Persist 30 Years Later.” January 19, 2012. University of North Carolina at Chapel Hill website. Viewed on October 11, 2012.

- Had their progress was monitored over time with follow-up studies conducted at ages 12, 15, and 21.[42]

The data released in January provides evidence that the adults who participated in high quality early childhood education programs continue to benefit from the early experiences. The latest study of the children at age 30 showed that participants:

- Had significantly more years of education as compared to peers that were in the control group.

- Were four times more likely to have college degrees, with 23% of participants having graduated from a four-year college compared to only 6% from the control group.[43]

- Completed college, which applied to both girls and boys, and is noteworthy according to lead researcher and co-author Elizabeth Pungello, Ph.D. given the "low rate of college gradation for minority males in our country."[44]

- Were more likely to have been consistently employed and less likely to have used public assistance.

- Had a tendency to delay parenthood by almost two years.

- Seemed to do better in relation to other social and economic measures (including higher incomes) but the results were not statistically significant.

According to Craig Ramey, Ph.D., a study co-author, these findings have strong public policy implications. "I believe that the pattern of results over the first 30 years of life provides a clearer than ever scientific understanding of how early childhood education can be an important contributor to academic achievement and social competence in adulthood. The next major challenge is to provide high quality early childhood education to all the children who need it and who can benefit from it."[45]

[42]The Carolina Abecedarian Project website, http://projects.fpg.unc.edu/~abc/. Viewed on October 11, 2012.
[43]"Benefits of High Quality Child Care Persist 30 Years Later." January 19, 2012. University of North Carolina at Chapel Hill website. Viewed on October 11, 2012.
[44]Ibid.
[45]Ibid.

Implications for Planning

The child care industry represents a very complex delivery system comprised of public, private, nonprofit and education entities. There are numerous public agencies involved in one capacity or another in the delivery of child care. The subsidy system is a maze of funding sources, with a wide range of requirements and restrictions. Typical child care providers and workers have expertise in educating and taking care of children and little or no experience in development, permit applications, lobbying, or finance. Thus, organizations like the CCPC are needed to support and advocate for them and to educate the broader community about the benefits of child care.

This study suggests that child care is a key component of the local economy, both through its direct and indirect economic effects, and through the role it plays in allowing parents to go to work, supporting productivity of workers, and reducing public sector social service costs. This work suggests some effort on the part of the CCPC and broader community. Some of these issues could be addressed through the Comprehensive Child Care Plan update. Stakeholders should:

- Identify more support and assistance for single heads of households, and in particular seek to provide women with child care cost assistance.
- Increase infant care spaces, the least-served child care sector in the County.
- Work with the Economic Development Department and local business community to educate the broader community about the role of child care in the County and the economic benefits of the industry.
- Work with the planning department to ensure that child care is considered and addressed in all large scale planning efforts, specific plans, and city and County general plans.

Appendix A: Detailed Supporting Data

Table A-1
Operating Child Care Expenditures for 2012 (Non Subsidy Expenditures)
Sonoma County Economic Impact Report - 2012

No.	Agency Name	Code	Total Budget	Notes/Rates	Non-Child Care Subsidy Budget
1	Associated Students - CSU Sonoma	CCTR	$132,339		
		CSPP	$101,333		
2	Children and Family Circle	CFCC	$787,589	30% admin	$236,277
3	Children's Workshop - Petaluma Inc	CSPP	$87,158		
4	Community Child Care Council of So Co	C2AP	$2,980,462	15% admin per contract	$447,069
		C3AP	$728,510		$109,277
		CAPP	$1,203,990		$180,599
		CCTR	$218,173		$32,726
		CRRP	$221,443	not child care subsidy	$221,443
		CSPP	$2,797,465		$419,620
5	Extended Child Care	CCTR	$478,668		
6	Healdsburg Unified School District	CSPP	$236,269		
7	Kenwood School District	CSPP	$23,098		
8	Old Adobe School District	CSPP	$118,120		
9	River to Coast Children's Services	C2AP	$93,553		$14,033
		C3AP	$33,161		$4,974
		CAPP	$347,886		$52,183
		CFCC	$1,044,628	30% admin	$313,388
		CRRP	$165,710	100% admin	$165,710
10	Roseland Elementary School District	CSPP	$573,667		
11	Santa Rosa Elementary School District	CSPP	$343,764		
12	Sonoma County Human Services Dept.	CAPP	$192,322		
13	Sonoma County Junior College District	CCTR	$262,073		
		CSPP	$218,357		
14	Sonoma County Office of Education	CSPP	$127,481		
15	Sonoma Valley Unified School District	CSPP	$78,738		
16	STARS Preschools	CSPP	$236,771		
17	Waugh Elementary School District	CCTR	$48,741		
		CSPP	$19,372		
18	West Santa Rosa Local Action	CSPP	$262,029		
19	YWCA of Sonoma County	CSPP	$251,618		
Total Budgets and Non Subsidy Budgets			**$14,414,488**		**$2,197,298**

Provided by Carol Simmons, Child Care Coordinator, Sonoma County (August 2012).
Sources: Sonoma County Child Care Planning Council; and Brion & Associates.

Table A-2
Labor Force Participation Rate Data from 2010 Census
B23008: AGE OF OWN CHILDREN UNDER 18 YEARS
2010 American Community Survey 1-Year

	Sonoma County, California		LFPR Rate
	Estimate	**Margin of Error**	
Total:	100,002	+/-2,188	
Under 6 years:	32,197	+/-1,818	
Living with two parents:	21,686	+/-2,094	65.7%
Both parents in labor force	12,686	+/-1,795	
Father only in labor force	7,861	+/-1,724	
Mother only in labor force	922	+/-996	
Neither parent in labor force	217	+/-345	
Living with one parent:	10,511	+/-1,967	
Living with father:	4,551	+/-1,516	
In labor force	4,515	+/-1,512	
Not in labor force	36	+/-62	
Living with mother:	5,960	+/-1,274	
In labor force	3,968	+/-1,090	
Not in labor force	1,992	+/-938	
6 to 17 years:	67,805	+/-2,083	74.9%
Living with two parents:	48,275	+/-3,187	
Both parents in labor force	32,885	+/-3,241	
Father only in labor force	13,417	+/-2,137	
Mother only in labor force	1,853	+/-879	
Neither parent in labor force	120	+/-174	
Living with one parent:	19,530	+/-2,694	
Living with father:	5,600	+/-1,705	
In labor force	4,813	+/-1,517	
Not in labor force	787	+/-936	
Living with mother:	13,930	+/-2,652	
In labor force	13,055	+/-2,575	
Not in labor force	875	+/-558	

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin

of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables.

Employment and unemployment estimates may vary from the official labor force data released by the Bureau of Labor Statistics because of differences in survey design and data collection. For guidance on differences in employment and unemployment estimates from different sources go to Labor Force Guidance.

The Census Bureau introduced an improved sequence of labor force questions in the 2008 ACS questionnaire. Accordingly, we recommend using caution when making labor force data comparisons from 2008 or later with data from prior years. For more information on these questions and their evaluation in the 2006 ACS Content Test, see the "Evaluation Report Covering Employment Status" at http://www.census.gov/acs/www/Downloads/methodology/content_test/P6a_Employment_Status.pdf, and the "Evaluation Report Covering Weeks Worked" at http://www.census.gov/acs/www/Downloads/methodology/content_test/P6b_Weeks_Worked_Final_Report.pdf. Additional information can also be found at http://www.census.gov/hhes/www/laborfor/laborforce.html.

While the 2010 American Community Survey (ACS) data generally reflect the December 2009 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities.

Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Source: U.S. Census Bureau, 2010 American Community Survey; Brion & Associates.

Appendix B: Economic Multiplier – Input/Output Analysis Tables

Table B-1
Estimated Employment Output of Child Care Services on Sonoma County Economy
Sonoma County Economic Impact Report - 2012

Sector	Description	Direct	Indirect	Induced	Total
0	**Total**	**2,772.3**	**309.6**	**424.5**	**3,506.5**
1	Oilseed farming	0.0	0.0	0.0	0.0
2	Grain farming	0.0	0.0	0.0	0.0
3	Vegetable and melon farming	0.0	0.0	0.0	0.0
4	Fruit farming	0.0	0.0	0.4	0.4
5	Tree nut farming	0.0	0.0	0.0	0.0
6	Greenhouse, nursery, and floriculture production	0.0	0.0	0.0	0.0
7	Tobacco farming	0.0	0.0	0.0	0.0
8	Cotton farming	0.0	0.0	0.0	0.0
9	Sugarcane and sugar beet farming	0.0	0.0	0.0	0.0
10	All other crop farming	0.0	0.1	0.1	0.2
11	Cattle ranching and farming	0.0	0.1	0.1	0.2
12	Dairy cattle and milk production	0.0	1.2	0.4	1.6
13	Poultry and egg production	0.0	0.0	0.0	0.0
14	Animal production, except cattle and poultry and eggs	0.0	0.1	0.2	0.3
15	Forestry, forest products, and timber tract production	0.0	0.0	0.0	0.0
16	Commercial logging	0.0	0.0	0.0	0.1
17	Commercial Fishing	0.0	0.0	0.0	0.0
18	Commercial hunting and trapping	0.0	0.0	0.0	0.0
19	Support activities for agriculture and forestry	0.0	0.2	0.4	0.5
20	Extraction of oil and natural gas	0.0	0.2	0.3	0.5
21	Mining coal	0.0	0.0	0.0	0.0
22	Mining iron ore	0.0	0.0	0.0	0.0
23	Mining copper, nickel, lead, and zinc	0.0	0.0	0.0	0.0
24	Mining gold, silver, and other metal ore	0.0	0.0	0.0	0.0
25	Mining and quarrying stone	0.0	0.1	0.0	0.1
26	Mining and quarrying sand, gravel, clay, and ceramic and refractory minerals	0.0	0.0	0.0	0.1
27	Mining and quarrying other nonmetallic minerals	0.0	0.0	0.0	0.0
28	Drilling oil and gas wells	0.0	0.0	0.0	0.0
29	Support activities for oil and gas operations	0.0	0.0	0.0	0.0
30	Support activities for other mining	0.0	0.0	0.0	0.0
31	Electric power generation, transmission, and distribution	0.0	0.0	0.0	0.0
32	Natural gas distribution	0.0	0.2	0.3	0.5
33	Water, sewage and other treatment and delivery systems	0.0	0.3	0.4	0.7
34	Construction of new nonresidential commercial and health care structures	0.0	0.0	0.0	0.0
35	Construction of new nonresidential manufacturing structures	0.0	0.0	0.0	0.0
36	Construction of other new nonresidential structures	0.0	0.0	0.0	0.0
37	Construction of new residential permanent site single- and multi-family structures	0.0	0.0	0.0	0.0
38	Construction of other new residential structures	0.0	0.0	0.0	0.0
39	Maintenance and repair construction of nonresidential structures	0.0	7.8	2.1	9.8
40	Maintenance and repair construction of residential structures	0.0	0.1	0.7	0.8
41	Dog and cat food manufacturing	0.0	0.0	0.0	0.0
42	Other animal food manufacturing	0.0	0.0	0.1	0.1
43	Flour milling and malt manufacturing	0.0	0.0	0.0	0.0
44	Wet corn milling	0.0	0.0	0.0	0.0
45	Soybean and other oilseed processing	0.0	0.0	0.0	0.0
46	Fats and oils refining and blending	0.0	0.0	0.0	0.0
47	Breakfast cereal manufacturing	0.0	0.0	0.0	0.0
48	Sugar cane mills and refining	0.0	0.0	0.0	0.0
49	Beet sugar manufacturing	0.0	0.0	0.0	0.0
50	Chocolate and confectionery manufacturing from cacao beans	0.0	0.0	0.0	0.0

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Sector	Description	Direct	Indirect	Induced	Total
51	Confectionery manufacturing from purchased chocolate	0.0	0.0	0.0	0.0
52	Nonchocolate confectionery manufacturing	0.0	0.0	0.0	0.0
53	Frozen food manufacturing	0.0	0.0	0.3	0.3
54	Fruit and vegetable canning, pickling, and drying	0.0	0.1	0.0	0.2
55	Fluid milk and butter manufacturing	0.0	0.7	0.2	0.9
56	Cheese manufacturing	0.0	0.1	0.0	0.1
57	Dry, condensed, and evaporated dairy product manufacturing	0.0	0.0	0.0	0.0
58	Ice cream and frozen dessert manufacturing	0.0	0.0	0.0	0.0
59	Animal (except poultry) slaughtering, rendering, and processin	0.0	0.1	0.1	0.2
60	Poultry processing	0.0	0.4	0.7	1.0
61	Seafood product preparation and packaging	0.0	0.0	0.0	0.0
62	Bread and bakery product manufacturing	0.0	0.1	0.2	0.3
63	Cookie, cracker, and pasta manufacturing	0.0	0.0	0.0	0.1
64	Tortilla manufacturing	0.0	0.0	0.1	0.1
65	Snack food manufacturing	0.0	0.0	0.0	0.0
66	Coffee and tea manufacturing	0.0	0.0	0.0	0.0
67	Flavoring syrup and concentrate manufacturing	0.0	0.0	0.0	0.0
68	Seasoning and dressing manufacturing	0.0	0.0	0.0	0.0
69	All other food manufacturing	0.0	0.0	0.0	0.0
70	Soft drink and ice manufacturing	0.0	0.0	0.0	0.0
71	Breweries	0.0	0.0	0.0	0.0
72	Wineries	0.0	0.0	0.2	0.2
73	Distilleries	0.0	0.0	0.0	0.0
74	Tobacco product manufacturing	0.0	0.0	0.0	0.0
75	Fiber, yarn, and thread mills	0.0	0.0	0.0	0.0
76	Broadwoven fabric mills	0.0	0.0	0.0	0.0
77	Narrow fabric mills and schiffli machine embroidery	0.0	0.0	0.0	0.0
78	Nonwoven fabric mills	0.0	0.0	0.0	0.0
79	Knit fabric mills	0.0	0.0	0.0	0.0
80	Textile and fabric finishing mills	0.0	0.0	0.0	0.0
81	Fabric coating mills	0.0	0.0	0.0	0.0
82	Carpet and rug mills	0.0	0.0	0.0	0.0
83	Curtain and linen mills	0.0	0.0	0.0	0.0
84	Textile bag and canvas mills	0.0	0.0	0.0	0.0
85	All other textile product mills	0.0	0.0	0.0	0.0
86	Apparel knitting mills	0.0	0.0	0.0	0.0
87	Cut and sew apparel contractors	0.0	0.0	0.0	0.1
88	Mens and boys cut and sew apparel manufacturing	0.0	0.0	0.0	0.0
89	Womens and girls cut and sew apparel manufacturing	0.0	0.0	0.0	0.0
90	Other cut and sew apparel manufacturing	0.0	0.0	0.0	0.0
91	Apparel accessories and other apparel manufacturing	0.0	0.0	0.0	0.0
92	Leather and hide tanning and finishing	0.0	0.0	0.0	0.0
93	Footwear manufacturing	0.0	0.0	0.0	0.0
94	Other leather and allied product manufacturing	0.0	0.0	0.0	0.0
95	Sawmills and wood preservation	0.0	0.1	0.0	0.1
96	Veneer and plywood manufacturing	0.0	0.0	0.0	0.0
97	Engineered wood member and truss manufacturing	0.0	0.1	0.0	0.1
98	Reconstituted wood product manufacturing	0.0	0.0	0.0	0.0
99	Wood windows and doors and millwork manufacturing	0.0	0.1	0.0	0.1
100	Wood container and pallet manufacturing	0.0	0.0	0.1	0.1
101	Manufactured home (mobile home) manufacturing	0.0	0.0	0.0	0.0

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Sector	Description	Direct	Indirect	Induced	Total
102	Prefabricated wood building manufacturing	0.0	0.0	0.0	0.0
103	All other miscellaneous wood product manufacturing	0.0	0.0	0.0	0.0
104	Pulp mills	0.0	0.0	0.0	0.0
105	Paper mills	0.0	0.0	0.0	0.0
106	Paperboard Mills	0.0	0.0	0.0	0.0
107	Paperboard container manufacturing	0.0	0.0	0.0	0.0
108	Coated and laminated paper, packaging paper and plastics film manufacturin	0.0	0.0	0.0	0.0
109	All other paper bag and coated and treated paper manufacturin	0.0	0.0	0.0	0.0
110	Stationery product manufacturing	0.0	0.0	0.0	0.0
111	Sanitary paper product manufacturing	0.0	0.0	0.0	0.0
112	All other converted paper product manufacturing	0.0	0.0	0.0	0.0
113	Printing	0.0	0.4	0.3	0.7
114	Support activities for printing	0.0	0.0	0.0	0.0
115	Petroleum refineries	0.0	0.0	0.0	0.0
116	Asphalt paving mixture and block manufacturing	0.0	0.0	0.0	0.0
117	Asphalt shingle and coating materials manufacturing	0.0	0.0	0.0	0.0
118	Petroleum lubricating oil and grease manufacturing	0.0	0.0	0.0	0.0
119	All other petroleum and coal products manufacturing	0.0	0.0	0.0	0.0
120	Petrochemical manufacturing	0.0	0.0	0.0	0.0
121	Industrial gas manufacturing	0.0	0.0	0.0	0.0
122	Synthetic dye and pigment manufacturing	0.0	0.0	0.0	0.0
123	Alkalies and chlorine manufacturing	0.0	0.0	0.0	0.0
124	Carbon black manufacturing	0.0	0.0	0.0	0.0
125	All other basic inorganic chemical manufacturing	0.0	0.0	0.0	0.0
126	Other basic organic chemical manufacturing	0.0	0.0	0.0	0.0
127	Plastics material and resin manufacturing	0.0	0.0	0.0	0.0
128	Synthetic rubber manufacturing	0.0	0.0	0.0	0.0
129	Artificial and synthetic fibers and filaments manufacturin	0.0	0.0	0.0	0.0
130	Fertilizer manufacturing	0.0	0.0	0.0	0.0
131	Pesticide and other agricultural chemical manufacturing	0.0	0.0	0.0	0.0
132	Medicinal and botanical manufacturing	0.0	0.0	0.0	0.0
133	Pharmaceutical preparation manufacturing	0.0	0.0	0.0	0.0
134	In-vitro diagnostic substance manufacturing	0.0	0.0	0.0	0.0
135	Biological product (except diagnostic) manufacturing	0.0	0.0	0.0	0.0
136	Paint and coating manufacturing	0.0	0.0	0.0	0.0
137	Adhesive manufacturing	0.0	0.0	0.0	0.0
138	Soap and cleaning compound manufacturing	0.0	0.0	0.0	0.0
139	Toilet preparation manufacturing	0.0	0.0	0.0	0.0
140	Printing ink manufacturing	0.0	0.0	0.0	0.0
141	All other chemical product and preparation manufacturing	0.0	0.0	0.0	0.0
142	Plastics packaging materials and unlaminated film and sheet manufacturin	0.0	0.0	0.0	0.0
143	Unlaminated plastics profile shape manufacturing	0.0	0.0	0.0	0.0
144	Plastics pipe and pipe fitting manufacturin	0.0	0.0	0.0	0.0
145	Laminated plastics plate, sheet (except packaging), and shape manufacturin	0.0	0.0	0.0	0.0
146	Polystyrene foam product manufacturing	0.0	0.0	0.0	0.0
147	Urethane and other foam product (except polystyrene) manufacturing	0.0	0.0	0.0	0.0
148	Plastics bottle manufacturing	0.0	0.0	0.0	0.0
149	Other plastics product manufacturing	0.0	0.1	0.1	0.2
150	Tire manufacturing	0.0	0.0	0.0	0.0
151	Rubber and plastics hoses and belting manufacturin	0.0	0.0	0.0	0.0
152	Other rubber product manufacturing	0.0	0.0	0.0	0.0

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Sector	Description	Direct	Indirect	Induced	Total
153	Pottery, ceramics, and plumbing fixture manufacturing	0.0	0.0	0.0	0.0
154	Brick, tile, and other structural clay product manufacturing	0.0	0.0	0.0	0.1
155	Clay and nonclay refractory manufacturing	0.0	0.0	0.0	0.0
156	Flat glass manufacturing	0.0	0.0	0.0	0.0
157	Other pressed and blown glass and glassware manufacturing	0.0	0.0	0.0	0.0
158	Glass container manufacturing	0.0	0.0	0.0	0.0
159	Glass product manufacturing made of purchased glass	0.0	0.0	0.0	0.0
160	Cement manufacturing	0.0	0.0	0.0	0.0
161	Ready-mix concrete manufacturing	0.0	0.2	0.0	0.2
162	Concrete pipe, brick, and block manufacturing	0.0	0.0	0.0	0.0
163	Other concrete product manufacturing	0.0	0.1	0.0	0.2
164	Lime and gypsum product manufacturing	0.0	0.0	0.0	0.0
165	Abrasive product manufacturing	0.0	0.0	0.0	0.0
166	Cut stone and stone product manufacturing	0.0	0.0	0.0	0.0
167	Ground or treated mineral and earth manufacturing	0.0	0.0	0.0	0.0
168	Mineral wool manufacturing	0.0	0.0	0.0	0.0
169	Miscellaneous nonmetallic mineral product manufacturing	0.0	0.0	0.0	0.0
170	Iron and steel mills and ferroalloy manufacturing	0.0	0.0	0.0	0.0
171	Steel product manufacturing from purchased stee	0.0	0.0	0.0	0.0
172	Alumina refining and primary aluminum production	0.0	0.0	0.0	0.0
173	Secondary smelting and alloying of aluminum	0.0	0.0	0.0	0.0
174	Aluminum product manufacturing from purchased aluminum	0.0	0.0	0.0	0.0
175	Primary smelting and refining of copper	0.0	0.0	0.0	0.0
176	Primary smelting and refining of nonferrous metal (except copper and aluminum	0.0	0.0	0.0	0.0
177	Copper rolling, drawing, extruding and alloying	0.0	0.0	0.0	0.0
178	Nonferrous metal (except copper and aluminum) rolling, drawing, extruding and all	0.0	0.0	0.0	0.0
179	Ferrous metal foundries	0.0	0.0	0.0	0.0
180	Nonferrous metal foundries	0.0	0.0	0.0	0.0
181	All other forging, stamping, and sintering	0.0	0.0	0.0	0.0
182	Custom roll forming	0.0	0.0	0.0	0.0
183	Crown and closure manufacturing and metal stamping	0.0	0.0	0.0	0.0
184	Cutlery, utensil, pot, and pan manufacturing	0.0	0.0	0.0	0.0
185	Handtool manufacturing	0.0	0.0	0.0	0.0
186	Plate work and fabricated structural product manufacturing	0.0	0.0	0.0	0.0
187	Ornamental and architectural metal products manufacturing	0.0	0.0	0.0	0.0
188	Power boiler and heat exchanger manufacturing	0.0	0.0	0.0	0.0
189	Metal tank (heavy gauge) manufacturing	0.0	0.0	0.0	0.0
190	Metal can, box, and other metal container (light gauge) manufacturing	0.0	0.0	0.0	0.0
191	Ammunition manufacturing	0.0	0.0	0.0	0.0
192	Arms, ordnance, and accessories manufacturing	0.0	0.0	0.0	0.0
193	Hardware manufacturing	0.0	0.0	0.0	0.0
194	Spring and wire product manufacturing	0.0	0.0	0.0	0.0
195	Machine shops	0.0	0.0	0.0	0.0
196	Turned product and screw, nut, and bolt manufacturing	0.0	0.0	0.0	0.0
197	Coating, engraving, heat treating and allied activitie	0.0	0.0	0.0	0.0
198	Valve and fittings other than plumbing manufacturing	0.0	0.0	0.0	0.0
199	Plumbing fixture fitting and trim manufacturing	0.0	0.0	0.0	0.0
200	Ball and roller bearing manufacturing	0.0	0.0	0.0	0.0
201	Fabricated pipe and pipe fitting manufacturing	0.0	0.0	0.0	0.0
202	Other fabricated metal manufacturing	0.0	0.0	0.0	0.0
203	Farm machinery and equipment manufacturing	0.0	0.0	0.0	0.0

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Sector	Description	Direct	Indirect	Induced	Total
204	Lawn and garden equipment manufacturing	0.0	0.0	0.0	0.0
205	Construction machinery manufacturing	0.0	0.0	0.0	0.0
206	Mining and oil and gas field machinery manufacturing	0.0	0.0	0.0	0.0
207	Other industrial machinery manufacturing	0.0	0.0	0.0	0.0
208	Plastics and rubber industry machinery manufacturing	0.0	0.0	0.0	0.0
209	Semiconductor machinery manufacturing	0.0	0.0	0.0	0.0
210	Vending, commercial, industrial, and office machinery manufacturing	0.0	0.0	0.0	0.0
211	Optical instrument and lens manufacturing	0.0	0.0	0.0	0.0
212	Photographic and photocopying equipment manufacturing	0.0	0.0	0.0	0.0
213	Other commercial and service industry machinery manufacturing	0.0	0.0	0.0	0.0
214	Air purification and ventilation equipment manufacturing	0.0	0.0	0.0	0.0
215	Heating equipment (except warm air furnaces) manufacturing	0.0	0.0	0.0	0.0
216	Air conditioning, refrigeration, and warm air heating equipment manufacturin	0.0	0.0	0.0	0.0
217	Industrial mold manufacturing	0.0	0.0	0.0	0.0
218	Metal cutting and forming machine tool manufacturing	0.0	0.0	0.0	0.0
219	Special tool, die, jig, and fixture manufacturing	0.0	0.0	0.0	0.0
220	Cutting tool and machine tool accessory manufacturing	0.0	0.0	0.0	0.0
221	Rolling mill and other metalworking machinery manufacturing	0.0	0.0	0.0	0.0
222	Turbine and turbine generator set units manufacturing	0.0	0.0	0.0	0.0
223	Speed changer, industrial high-speed drive, and gear manufacturin	0.0	0.0	0.0	0.0
224	Mechanical power transmission equipment manufacturing	0.0	0.0	0.0	0.0
225	Other engine equipment manufacturing	0.0	0.0	0.0	0.0
226	Pump and pumping equipment manufacturing	0.0	0.0	0.0	0.0
227	Air and gas compressor manufacturing	0.0	0.0	0.0	0.0
228	Material handling equipment manufacturing	0.0	0.0	0.0	0.0
229	Power-driven handtool manufacturing	0.0	0.0	0.0	0.0
230	Other general purpose machinery manufacturing	0.0	0.0	0.0	0.0
231	Packaging machinery manufacturing	0.0	0.0	0.0	0.0
232	Industrial process furnace and oven manufacturing	0.0	0.0	0.0	0.0
233	Fluid power process machinery manufacturing	0.0	0.0	0.0	0.0
234	Electronic computer manufacturing	0.0	0.0	0.0	0.0
235	Computer storage device manufacturing	0.0	0.0	0.0	0.0
236	Computer terminals and other computer peripheral equipment manufacturing	0.0	0.0	0.0	0.0
237	Telephone apparatus manufacturing	0.0	0.0	0.0	0.0
238	Broadcast and wireless communications equipment manufacturing	0.0	0.0	0.0	0.0
239	Other communications equipment manufacturing	0.0	0.0	0.0	0.0
240	Audio and video equipment manufacturing	0.0	0.0	0.0	0.0
241	Electron tube manufacturing	0.0	0.0	0.0	0.0
242	Bare printed circuit board manufacturing	0.0	0.0	0.0	0.0
243	Semiconductor and related device manufacturing	0.0	0.0	0.0	0.0
244	Electronic capacitor, resistor, coil, transformer, and other inductor manufacturing	0.0	0.0	0.0	0.0
245	Electronic connector manufacturing	0.0	0.0	0.0	0.0
246	Printed circuit assembly (electronic assembly) manufacturing	0.0	0.0	0.0	0.0
247	Other electronic component manufacturing	0.0	0.0	0.0	0.0
248	Electromedical and electrotherapeutic apparatus manufacturing	0.0	0.0	0.0	0.0
249	Search, detection, and navigation instruments manufacturing	0.0	0.0	0.0	0.0
250	Automatic environmental control manufacturing	0.0	0.0	0.0	0.0
251	Industrial process variable instruments manufacturing	0.0	0.0	0.0	0.0
252	Totalizing fluid meters and counting devices manufacturing	0.0	0.0	0.0	0.0
253	Electricity and signal testing instruments manufacturing	0.0	0.0	0.0	0.0
254	Analytical laboratory instrument manufacturing	0.0	0.0	0.0	0.0

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Sector	Description	Direct	Indirect	Induced	Total
255	Irradiation apparatus manufacturing	0.0	0.0	0.0	0.0
256	Watch, clock, and other measuring and controlling device manufacturing	0.0	0.0	0.0	0.0
257	Software, audio, and video media for reproduction	0.0	0.0	0.0	0.0
258	Magnetic and optical recording media manufacturing	0.0	0.0	0.0	0.0
259	Electric lamp bulb and part manufacturing	0.0	0.0	0.0	0.0
260	Lighting fixture manufacturing	0.0	0.0	0.0	0.0
261	Small electrical appliance manufacturing	0.0	0.0	0.0	0.0
262	Household cooking appliance manufacturing	0.0	0.0	0.0	0.0
263	Household refrigerator and home freezer manufacturing	0.0	0.0	0.0	0.0
264	Household laundry equipment manufacturing	0.0	0.0	0.0	0.0
265	Other major household appliance manufacturing	0.0	0.0	0.0	0.0
266	Power, distribution, and specialty transformer manufacturing	0.0	0.0	0.0	0.0
267	Motor and generator manufacturing	0.0	0.0	0.0	0.0
268	Switchgear and switchboard apparatus manufacturing	0.0	0.0	0.0	0.0
269	Relay and industrial control manufacturing	0.0	0.0	0.0	0.0
270	Storage battery manufacturing	0.0	0.0	0.0	0.0
271	Primary battery manufacturing	0.0	0.0	0.0	0.0
272	Communication and energy wire and cable manufacturing	0.0	0.0	0.0	0.0
273	Wiring device manufacturing	0.0	0.0	0.0	0.0
274	Carbon and graphite product manufacturing	0.0	0.0	0.0	0.0
275	All other miscellaneous electrical equipment and component manufacturing	0.0	0.0	0.0	0.0
276	Automobile manufacturing	0.0	0.0	0.0	0.0
277	Light truck and utility vehicle manufacturing	0.0	0.0	0.0	0.0
278	Heavy duty truck manufacturing	0.0	0.0	0.0	0.0
279	Motor vehicle body manufacturing	0.0	0.0	0.0	0.0
280	Truck trailer manufacturing	0.0	0.0	0.0	0.0
281	Motor home manufacturing	0.0	0.0	0.0	0.0
282	Travel trailer and camper manufacturing	0.0	0.0	0.0	0.0
283	Motor vehicle parts manufacturing	0.0	0.0	0.0	0.0
284	Aircraft manufacturing	0.0	0.0	0.0	0.0
285	Aircraft engine and engine parts manufacturing	0.0	0.0	0.0	0.0
286	Other aircraft parts and auxiliary equipment manufacturing	0.0	0.0	0.0	0.0
287	Guided missile and space vehicle manufacturing	0.0	0.0	0.0	0.0
288	Propulsion units and parts for space vehicles and guided missiles manufacturin	0.0	0.0	0.0	0.0
289	Railroad rolling stock manufacturing	0.0	0.0	0.0	0.0
290	Ship building and repairing	0.0	0.0	0.0	0.0
291	Boat building	0.0	0.0	0.0	0.0
292	Motorcycle, bicycle, and parts manufacturing	0.0	0.0	0.0	0.0
293	Military armored vehicle, tank, and tank component manufacturing	0.0	0.0	0.0	0.0
294	All other transportation equipment manufacturing	0.0	0.0	0.0	0.0
295	Wood kitchen cabinet and countertop manufacturing	0.0	0.0	0.0	0.0
296	Upholstered household furniture manufacturing	0.0	0.0	0.0	0.0
297	Nonupholstered wood household furniture manufacturing	0.0	0.0	0.0	0.0
298	Metal and other household furniture manufacturing	0.0	0.0	0.0	0.0
299	Institutional furniture manufacturing	0.0	0.0	0.0	0.0
300	Office Furniture	0.0	0.0	0.0	0.0
301	Custom architectural woodwork and millwork manufacturing	0.0	0.0	0.0	0.0
302	Showcase, partition, shelving, and locker manufacturing	0.0	0.0	0.0	0.0
303	Mattress manufacturing	0.0	0.0	0.0	0.0
304	Blind and shade manufacturing	0.0	0.0	0.0	0.0
305	Surgical and medical instrument, laboratory and medical instrument manufacturing	0.0	0.0	0.0	0.0

Table B-1
Estimated Employment Output of Child Care Services on Sonoma County Economy
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Sector	Description	Direct	Indirect	Induced	Total
306	Surgical appliance and supplies manufacturing	0.0	0.0	0.1	0.1
307	Dental equipment and supplies manufacturing	0.0	0.0	0.0	0.0
308	Ophthalmic goods manufacturing	0.0	0.0	0.0	0.0
309	Dental laboratories manufacturing	0.0	0.0	0.0	0.0
310	Jewelry and silverware manufacturing	0.0	0.0	0.0	0.0
311	Sporting and athletic goods manufacturing	0.0	0.0	0.0	0.0
312	Doll, toy, and game manufacturing	0.0	0.1	0.0	0.1
313	Office supplies (except paper) manufacturing	0.0	0.0	0.0	0.0
314	Sign manufacturing	0.0	0.1	0.1	0.2
315	Gasket, packing, and sealing device manufacturing	0.0	0.0	0.0	0.0
316	Musical instrument manufacturing	0.0	0.0	0.0	0.0
317	All other miscellaneous manufacturing	0.0	0.0	0.0	0.1
318	Broom, brush, and mop manufacturing	0.0	0.0	0.0	0.0
319	Wholesale trade businesses	0.0	3.2	9.2	12.4
320	Retail Stores - Motor vehicle and parts	0.0	0.1	7.7	7.9
321	Retail Stores - Furniture and home furnishings	0.0	0.0	2.4	2.4
322	Retail Stores - Electronics and appliances	0.0	0.0	2.3	2.3
323	Retail Stores - Building material and garden supply	0.0	0.1	4.7	4.9
324	Retail Stores - Food and beverage	0.0	0.2	14.9	15.1
325	Retail Stores - Health and personal care	0.0	0.1	4.9	5.0
326	Retail Stores - Gasoline stations	0.0	0.0	2.2	2.2
327	Retail Stores - Clothing and clothing accessories	0.0	0.1	7.6	7.7
328	Retail Stores - Sporting goods, hobby, book and music	0.0	0.0	4.0	4.1
329	Retail Stores - General merchandise	0.0	0.1	11.3	11.4
330	Retail Stores - Miscellaneous	0.0	0.1	7.5	7.5
331	Retail Nonstores - Direct and electronic sales	0.0	0.1	8.4	8.4
332	Transport by air	0.0	0.0	0.0	0.0
333	Transport by rail	0.0	0.0	0.0	0.0
334	Transport by water	0.0	0.0	0.0	0.0
335	Transport by truck	0.0	1.5	1.8	3.3
336	Transit and ground passenger transportation	0.0	1.5	2.1	3.6
337	Transport by pipeline	0.0	0.0	0.0	0.0
338	Scenic and sightseeing transportation and support activities for transportation	0.0	0.7	0.8	1.5
339	Couriers and messengers	0.0	1.4	1.2	2.6
340	Warehousing and storage	0.0	0.6	0.8	1.4
341	Newspaper publishers	0.0	1.1	1.2	2.3
342	Periodical publishers	0.0	0.2	0.1	0.4
343	Book publishers	0.0	0.1	0.1	0.2
344	Directory, mailing list, and other publishers	0.0	0.0	0.0	0.1
345	Software publishers	0.0	0.1	0.0	0.1
346	Motion picture and video industries	0.0	4.7	0.8	5.5
347	Sound recording industries	0.0	0.0	0.0	0.0
348	Radio and television broadcasting	0.0	1.1	0.7	1.9
349	Cable and other subscription programming	0.0	0.5	0.3	0.8
350	Internet publishing and broadcasting	0.0	0.2	0.1	0.3
351	Telecommunications	0.0	2.8	2.0	4.8
352	Data processing, hosting, ISP, web search portals and related service	0.0	0.1	0.2	0.2
353	Other information services	0.0	0.0	0.0	0.0
354	Monetary authorities and depository credit intermediation activitie	0.0	3.1	4.4	7.5
355	Nondepository credit intermediation and related activities	0.0	5.7	9.6	15.3
356	Securities, commodity contracts, investments, and related activities	0.0	57.2	18.8	76.0

Table B-1
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Sector	Description	Direct	Indirect	Induced	Total
357	Insurance carriers	0.0	2.2	2.7	4.9
358	Insurance agencies, brokerages, and related activitie:	0.0	2.9	3.0	5.9
359	Funds, trusts, and other financial vehicle:	0.0	0.1	0.9	0.9
360	Real estate establishment:	0.0	38.9	20.6	59.5
361	Imputed rental activity for owner-occupied dwelling:	0.0	0.0	0.0	0.0
362	Automotive equipment rental and leasing	0.0	0.2	0.3	0.4
363	General and consumer goods rental except video tapes and disc	0.0	0.1	0.9	1.0
364	Video tape and disc renta	0.0	0.0	0.4	0.4
365	Commercial and industrial machinery and equipment rental and leasing	0.0	0.3	0.1	0.4
366	Lessors of nonfinancial intangible asset:	0.0	0.1	0.0	0.1
367	Legal services	0.0	4.0	4.3	8.3
368	Accounting, tax preparation, bookkeeping, and payroll service:	0.0	12.9	4.2	17.2
369	Architectural, engineering, and related service:	0.0	5.9	1.5	7.4
370	Specialized design service:	0.0	0.3	0.2	0.5
371	Custom computer programming services	0.0	0.7	0.3	1.0
372	Computer systems design service:	0.0	2.5	0.9	3.4
373	Other computer related services, including facilities managemen	0.0	0.5	0.2	0.7
374	Management, scientific, and technical consulting service	0.0	5.2	2.0	7.1
375	Environmental and other technical consulting service:	0.0	1.2	0.5	1.6
376	Scientific research and development service:	0.0	0.2	0.6	0.8
377	Advertising and related service:	0.0	2.5	1.5	4.1
378	Photographic services	0.0	0.1	0.2	0.3
379	Veterinary services	0.0	0.0	2.0	2.0
380	All other miscellaneous professional, scientific, and technical service	0.0	0.9	0.4	1.2
381	Management of companies and enterprise:	0.0	1.7	1.0	2.7
382	Employment services	0.0	33.0	8.2	41.2
383	Travel arrangement and reservation service:	0.0	0.2	0.6	0.7
384	Office administrative service:	0.0	2.4	0.7	3.1
385	Facilities support service:	0.0	0.1	0.0	0.2
386	Business support service:	0.0	1.5	1.0	2.4
387	Investigation and security service:	0.0	3.6	2.1	5.7
388	Services to buildings and dwelling:	0.0	19.4	6.3	25.7
389	Other support services	0.0	0.7	0.5	1.2
390	Waste management and remediation service:	0.0	1.8	1.1	2.9
391	Private elementary and secondary schools	0.0	0.0	6.8	6.8
392	Private junior colleges, colleges, universities, and professional school	0.0	0.0	0.2	0.2
393	Other private educational service:	0.0	0.1	7.1	7.2
394	Offices of physicians, dentists, and other health practitioner	0.0	0.0	24.5	24.5
395	Home health care services	0.0	0.0	3.0	3.0
396	Medical and diagnostic labs and outpatient and other ambulatory care service	0.0	0.0	6.7	6.7
397	Private hospitals	0.0	0.0	14.3	14.3
398	Nursing and residential care facilitie:	0.0	0.0	14.2	14.2
399	Child day care services	2,772.3	0.0	4.5	2,776.8
400	Individual and family service:	0.0	0.0	11.4	11.4
401	Community food, housing, and other relief services, including rehabilitation service	0.0	0.0	3.3	3.3
402	Performing arts companies	0.0	0.5	2.9	3.5
403	Spectator sports companies	0.0	4.1	5.1	9.2
404	Promoters of performing arts and sports and agents for public figure	0.0	3.1	2.6	5.7
405	Independent artists, writers, and performer:	0.0	5.3	0.5	5.8
406	Museums, historical sites, zoos, and parks	0.0	0.0	0.5	0.5
407	Fitness and recreational sports center:	0.0	1.1	2.7	3.7

Table B-1
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Sector	Description	Direct	Indirect	Induced	Total
408	Bowling centers	0.0	0.0	0.1	0.1
409	Amusement parks, arcades, and gambling industries	0.0	0.0	3.8	3.8
410	Other amusement and recreation industries	0.0	0.4	2.2	2.6
411	Hotels and motels, including casino hotels	0.0	0.5	0.3	0.8
412	Other accommodations	0.0	0.0	0.0	0.0
413	Food services and drinking places	0.0	32.1	49.2	81.3
414	Automotive repair and maintenance, except car washes	0.0	1.3	4.0	5.4
415	Car washes	0.0	0.1	1.0	1.1
416	Electronic and precision equipment repair and maintenance	0.0	0.3	0.3	0.6
417	Commercial and industrial machinery and equipment repair and maintenance	0.0	0.8	0.5	1.2
418	Personal and household goods repair and maintenance	0.0	0.3	0.5	0.8
419	Personal care services	0.0	0.0	5.0	5.0
420	Death care services	0.0	0.0	0.6	0.6
421	Dry-cleaning and laundry services	0.0	3.2	1.6	4.8
422	Other personal services	0.0	0.3	2.0	2.3
423	Religious organizations	0.0	0.0	2.6	2.6
424	Grantmaking, giving, and social advocacy organizations	0.0	0.0	4.6	4.6
425	Civic, social, professional, and similar organizations	0.0	1.8	6.1	7.9
426	Private household operations	0.0	0.0	14.0	14.0
427	US Postal Service	0.0	1.7	1.9	3.6
428	Federal electric utilities	0.0	0.0	0.0	0.0
429	Other Federal Government enterprises	0.0	0.1	0.1	0.2
430	State and local government passenger transit	0.0	0.5	0.7	1.2
431	State and local government electric utilities	0.0	0.2	0.1	0.3
432	Other state and local government enterprises	0.0	5.2	2.8	8.0
433	* Not an industry (Used and secondhand goods)	0.0	0.0	0.0	0.0
434	* Not an industry (Scrap)	0.0	0.0	0.0	0.0
435	* Not an industry (Rest of the world adjustment)	0.0	0.0	0.0	0.0
436	* Not an industry (Noncomparable foreign imports)	0.0	0.0	0.0	0.0
437	* Employment and payroll only (state & local govt, non-education)	0.0	0.0	0.0	0.0
438	* Employment and payroll only (state & local govt, education)	0.0	0.0	0.0	0.0
439	* Employment and payroll only (federal govt, non-military)	0.0	0.0	0.0	0.0
440	* Employment and payroll only (federal govt, military)	0.0	0.0	0.0	0.0

Sources: 2010 Minnesota IMPLAN Group, Inc.; Brion & Associates.

Table B-2
Estimated Output of Child Care Services on Sonoma County Economy
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Sector	Description	Direct	Indirect	Induced	Total
0	**Total**	**$123,804,244**	**$38,452,018**	**$51,725,510**	**$213,981,772**
1	Oilseed farming	$0	$0	$0	$0
2	Grain farming	$0	$429	$718	$1,147
3	Vegetable and melon farming	$0	$643	$12,482	$13,125
4	Fruit farming	$0	$5,646	$81,447	$87,094
5	Tree nut farming	$0	$19	$775	$794
6	Greenhouse, nursery, and floriculture production	$0	$591	$10,649	$11,241
7	Tobacco farming	$0	$0	$0	$0
8	Cotton farming	$0	$0	$0	$0
9	Sugarcane and sugar beet farming	$0	$0	$0	$0
10	All other crop farming	$0	$22,015	$13,592	$35,607
11	Cattle ranching and farming	$0	$16,337	$14,227	$30,564
12	Dairy cattle and milk production	$0	$175,096	$64,175	$239,272
13	Poultry and egg production	$0	$7,406	$20,823	$28,229
14	Animal production, except cattle and poultry and eggs	$0	$3,488	$16,123	$19,611
15	Forestry, forest products, and timber tract production	$0	$65	$7	$72
16	Commercial logging	$0	$5,321	$522	$5,844
17	Commercial Fishing	$0	$747	$2,477	$3,224
18	Commercial hunting and trapping	$0	$0	$0	$0
19	Support activities for agriculture and forestry	$0	$6,352	$15,392	$21,744
20	Extraction of oil and natural gas	$0	$29,255	$35,800	$65,055
21	Mining coal	$0	$0	$0	$0
22	Mining iron ore	$0	$0	$0	$0
23	Mining copper, nickel, lead, and zinc	$0	$0	$0	$0
24	Mining gold, silver, and other metal ore	$0	$0	$0	$0
25	Mining and quarrying stone	$0	$26,445	$11,227	$37,673
26	Mining and quarrying sand, gravel, clay, and ceramic and refractory minerals	$0	$5,595	$1,172	$6,767
27	Mining and quarrying other nonmetallic minerals	$0	$0	$0	$0
28	Drilling oil and gas wells	$0	$0	$0	$0
29	Support activities for oil and gas operations	$0	$905	$1,102	$2,007
30	Support activities for other mining	$0	$0	$0	$0
31	Electric power generation, transmission, and distribution	$0	$0	$0	$0
32	Natural gas distribution	$0	$277,677	$365,877	$643,554
33	Water, sewage and other treatment and delivery systems	$0	$76,456	$87,941	$164,397
34	Construction of new nonresidential commercial and health care structures	$0	$0	$0	$0
35	Construction of new nonresidential manufacturing structures	$0	$0	$0	$0
36	Construction of other new nonresidential structures	$0	$0	$0	$0
37	Construction of new residential permanent site single- and multi-family structui	$0	$0	$0	$0
38	Construction of other new residential structures	$0	$0	$0	$0
39	Maintenance and repair construction of nonresidential structures	$0	$1,166,252	$311,324	$1,477,576
40	Maintenance and repair construction of residential structures	$0	$23,941	$134,866	$158,806
41	Dog and cat food manufacturing	$0	$0	$0	$0
42	Other animal food manufacturing	$0	$42,272	$69,804	$112,077
43	Flour milling and malt manufacturing	$0	$10,762	$2,709	$13,471
44	Wet corn milling	$0	$0	$0	$0
45	Soybean and other oilseed processing	$0	$0	$0	$0
46	Fats and oils refining and blending	$0	$2,789	$12,503	$15,293
47	Breakfast cereal manufacturing	$0	$0	$0	$0
48	Sugar cane mills and refining	$0	$0	$0	$0
49	Beet sugar manufacturing	$0	$0	$0	$0
50	Chocolate and confectionery manufacturing from cacao beans	$0	$650	$792	$1,442
51	Confectionery manufacturing from purchased chocolate	$0	$99	$672	$771
52	Nonchocolate confectionery manufacturing	$0	$0	$0	$0
53	Frozen food manufacturing	$0	$11,520	$105,632	$117,151
54	Fruit and vegetable canning, pickling, and drying	$0	$60,283	$23,937	$84,220
55	Fluid milk and butter manufacturing	$0	$427,529	$151,793	$579,322
56	Cheese manufacturing	$0	$78,732	$28,879	$107,611
57	Dry, condensed, and evaporated dairy product manufacturing	$0	$20,165	$4,026	$24,191

Table B-2
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Sector	Description	Direct	Indirect	Induced	Total
58	Ice cream and frozen dessert manufacturing	$0	$13,552	$1,609	$15,161
59	Animal (except poultry) slaughtering, rendering, and processing	$0	$42,648	$40,285	$82,933
60	Poultry processing	$0	$89,705	$161,077	$250,782
61	Seafood product preparation and packaging	$0	$1,639	$9,107	$10,745
62	Bread and bakery product manufacturing	$0	$22,578	$29,231	$51,809
63	Cookie, cracker, and pasta manufacturing	$0	$11,173	$13,811	$24,985
64	Tortilla manufacturing	$0	$672	$19,747	$20,419
65	Snack food manufacturing	$0	$0	$0	$0
66	Coffee and tea manufacturing	$0	$3,734	$20,108	$23,842
67	Flavoring syrup and concentrate manufacturing	$0	$0	$0	$0
68	Seasoning and dressing manufacturing	$0	$1,829	$4,367	$6,196
69	All other food manufacturing	$0	$7,815	$4,673	$12,489
70	Soft drink and ice manufacturing	$0	$1,452	$34,725	$36,177
71	Breweries	$0	$1,258	$44,923	$46,181
72	Wineries	$0	$3,249	$68,663	$71,912
73	Distilleries	$0	$0	$0	$0
74	Tobacco product manufacturing	$0	$0	$0	$0
75	Fiber, yarn, and thread mills	$0	$25	$115	$140
76	Broadwoven fabric mills	$0	$7	$105	$112
77	Narrow fabric mills and schiffli machine embroidery	$0	$0	$0	$0
78	Nonwoven fabric mills	$0	$0	$0	$0
79	Knit fabric mills	$0	$0	$0	$0
80	Textile and fabric finishing mills	$0	$49	$355	$404
81	Fabric coating mills	$0	$0	$0	$0
82	Carpet and rug mills	$0	$0	$0	$0
83	Curtain and linen mills	$0	$97	$1,545	$1,642
84	Textile bag and canvas mills	$0	$70	$310	$380
85	All other textile product mills	$0	$162	$440	$602
86	Apparel knitting mills	$0	$0	$0	$0
87	Cut and sew apparel contractors	$0	$1,299	$3,651	$4,950
88	Mens and boys cut and sew apparel manufacturing	$0	$13	$1,590	$1,602
89	Womens and girls cut and sew apparel manufacturing	$0	$8	$3,967	$3,975
90	Other cut and sew apparel manufacturing	$0	$4	$145	$149
91	Apparel accessories and other apparel manufacturing	$0	$3	$346	$349
92	Leather and hide tanning and finishing	$0	$0	$0	$0
93	Footwear manufacturing	$0	$0	$0	$0
94	Other leather and allied product manufacturing	$0	$33	$132	$165
95	Sawmills and wood preservation	$0	$28,948	$2,057	$31,005
96	Veneer and plywood manufacturing	$0	$0	$0	$0
97	Engineered wood member and truss manufacturing	$0	$8,834	$1,823	$10,658
98	Reconstituted wood product manufacturing	$0	$0	$0	$0
99	Wood windows and doors and millwork manufacturing	$0	$17,179	$2,648	$19,827
100	Wood container and pallet manufacturing	$0	$4,348	$10,332	$14,680
101	Manufactured home (mobile home) manufacturing	$0	$29	$8	$37
102	Prefabricated wood building manufacturing	$0	$117	$54	$171
103	All other miscellaneous wood product manufacturing	$0	$5,705	$2,158	$7,864
104	Pulp mills	$0	$0	$0	$0
105	Paper mills	$0	$266	$436	$702
106	Paperboard Mills	$0	$0	$0	$0
107	Paperboard container manufacturing	$0	$6,641	$1,547	$8,189
108	Coated and laminated paper, packaging paper and plastics film manufacturing	$0	$0	$0	$0
109	All other paper bag and coated and treated paper manufacturing	$0	$0	$0	$0
110	Stationery product manufacturing	$0	$1,038	$2,503	$3,541
111	Sanitary paper product manufacturing	$0	$0	$0	$0
112	All other converted paper product manufacturing	$0	$250	$1,051	$1,301
113	Printing	$0	$72,674	$43,964	$116,638
114	Support activities for printing	$0	$41	$32	$73
115	Petroleum refineries	$0	$0	$0	$0

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Sector	Description	Direct	Indirect	Induced	Total
116	Asphalt paving mixture and block manufacturing	$0	$3,056	$1,184	$4,240
117	Asphalt shingle and coating materials manufacturing	$0	$0	$0	$0
118	Petroleum lubricating oil and grease manufacturing	$0	$1,952	$983	$2,935
119	All other petroleum and coal products manufacturing	$0	$0	$0	$0
120	Petrochemical manufacturing	$0	$0	$0	$0
121	Industrial gas manufacturing	$0	$0	$0	$0
122	Synthetic dye and pigment manufacturing	$0	$0	$0	$0
123	Alkalies and chlorine manufacturing	$0	$0	$0	$0
124	Carbon black manufacturing	$0	$0	$0	$0
125	All other basic inorganic chemical manufacturing	$0	$0	$0	$0
126	Other basic organic chemical manufacturing	$0	$3,385	$3,414	$6,799
127	Plastics material and resin manufacturing	$0	$1,172	$786	$1,958
128	Synthetic rubber manufacturing	$0	$0	$0	$0
129	Artificial and synthetic fibers and filaments manufacturing	$0	$15	$7	$22
130	Fertilizer manufacturing	$0	$9,021	$11,909	$20,930
131	Pesticide and other agricultural chemical manufacturing	$0	$0	$0	$0
132	Medicinal and botanical manufacturing	$0	$2	$11	$13
133	Pharmaceutical preparation manufacturing	$0	$19	$24,566	$24,585
134	In-vitro diagnostic substance manufacturing	$0	$0	$0	$0
135	Biological product (except diagnostic) manufacturing	$0	$0	$0	$0
136	Paint and coating manufacturing	$0	$0	$0	$0
137	Adhesive manufacturing	$0	$0	$0	$0
138	Soap and cleaning compound manufacturing	$0	$1,252	$5,775	$7,027
139	Toilet preparation manufacturing	$0	$139	$5,284	$5,423
140	Printing ink manufacturing	$0	$30	$18	$48
141	All other chemical product and preparation manufacturing	$0	$90	$76	$165
142	Plastics packaging materials and unlaminated film and sheet manufacturing	$0	$9,513	$5,960	$15,473
143	Unlaminated plastics profile shape manufacturing	$0	$99	$53	$153
144	Plastics pipe and pipe fitting manufacturing	$0	$0	$0	$0
145	Laminated plastics plate, sheet (except packaging), and shape manufacturing	$0	$1,002	$687	$1,689
146	Polystyrene foam product manufacturing	$0	$0	$0	$0
147	Urethane and other foam product (except polystyrene) manufacturing	$0	$43	$108	$150
148	Plastics bottle manufacturing	$0	$0	$0	$0
149	Other plastics product manufacturing	$0	$32,824	$12,585	$45,409
150	Tire manufacturing	$0	$0	$0	$0
151	Rubber and plastics hoses and belting manufacturing	$0	$0	$0	$0
152	Other rubber product manufacturing	$0	$0	$0	$0
153	Pottery, ceramics, and plumbing fixture manufacturing	$0	$24	$56	$80
154	Brick, tile, and other structural clay product manufacturing	$0	$7,296	$3,160	$10,456
155	Clay and nonclay refractory manufacturing	$0	$0	$0	$0
156	Flat glass manufacturing	$0	$13	$26	$39
157	Other pressed and blown glass and glassware manufacturing	$0	$0	$0	$0
158	Glass container manufacturing	$0	$281	$387	$668
159	Glass product manufacturing made of purchased glass	$0	$230	$2,289	$2,519
160	Cement manufacturing	$0	$0	$0	$0
161	Ready-mix concrete manufacturing	$0	$49,556	$9,600	$59,155
162	Concrete pipe, brick, and block manufacturing	$0	$0	$0	$0
163	Other concrete product manufacturing	$0	$22,837	$6,332	$29,168
164	Lime and gypsum product manufacturing	$0	$0	$0	$0
165	Abrasive product manufacturing	$0	$0	$0	$0
166	Cut stone and stone product manufacturing	$0	$917	$2,624	$3,541
167	Ground or treated mineral and earth manufacturing	$0	$765	$828	$1,592
168	Mineral wool manufacturing	$0	$0	$0	$0
169	Miscellaneous nonmetallic mineral product manufacturing	$0	$108	$50	$158
170	Iron and steel mills and ferroalloy manufacturing	$0	$1,197	$371	$1,568
171	Steel product manufacturing from purchased steel	$0	$0	$0	$0
172	Alumina refining and primary aluminum production	$0	$0	$0	$0
173	Secondary smelting and alloying of aluminum	$0	$0	$0	$0

Table B-2
Estimated Output of Child Care Services on Sonoma County Economy
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Sector	Description	Direct	Indirect	Induced	Total
174	Aluminum product manufacturing from purchased aluminum	$0	$0	$0	$0
175	Primary smelting and refining of copper	$0	$0	$0	$0
176	Primary smelting and refining of nonferrous metal (except copper and aluminur	$0	$0	$0	$0
177	Copper rolling, drawing, extruding and alloying	$0	$0	$0	$0
178	Nonferrous metal (except copper and aluminum) rolling, drawing, extruding an	$0	$0	$0	$0
179	Ferrous metal foundries	$0	$0	$0	$0
180	Nonferrous metal foundries	$0	$5	$4	$9
181	All other forging, stamping, and sintering	$0	$1,074	$995	$2,069
182	Custom roll forming	$0	$0	$0	$0
183	Crown and closure manufacturing and metal stamping	$0	$0	$0	$0
184	Cutlery, utensil, pot, and pan manufacturing	$0	$0	$0	$0
185	Handtool manufacturing	$0	$148	$406	$554
186	Plate work and fabricated structural product manufacturing	$0	$2,913	$836	$3,749
187	Ornamental and architectural metal products manufacturing	$0	$7,024	$1,281	$8,305
188	Power boiler and heat exchanger manufacturing	$0	$0	$0	$0
189	Metal tank (heavy gauge) manufacturing	$0	$397	$225	$622
190	Metal can, box, and other metal container (light gauge) manufacturing	$0	$0	$0	$0
191	Ammunition manufacturing	$0	$1	$30	$32
192	Arms, ordnance, and accessories manufacturing	$0	$0	$0	$0
193	Hardware manufacturing	$0	$326	$263	$589
194	Spring and wire product manufacturing	$0	$0	$0	$0
195	Machine shops	$0	$262	$233	$496
196	Turned product and screw, nut, and bolt manufacturing	$0	$253	$190	$442
197	Coating, engraving, heat treating and allied activities	$0	$61	$68	$129
198	Valve and fittings other than plumbing manufacturing	$0	$514	$210	$725
199	Plumbing fixture fitting and trim manufacturing	$0	$503	$206	$709
200	Ball and roller bearing manufacturing	$0	$0	$0	$0
201	Fabricated pipe and pipe fitting manufacturing	$0	$0	$0	$0
202	Other fabricated metal manufacturing	$0	$1,035	$727	$1,761
203	Farm machinery and equipment manufacturing	$0	$66	$42	$108
204	Lawn and garden equipment manufacturing	$0	$0	$0	$0
205	Construction machinery manufacturing	$0	$0	$0	$0
206	Mining and oil and gas field machinery manufacturing	$0	$0	$0	$0
207	Other industrial machinery manufacturing	$0	$128	$252	$379
208	Plastics and rubber industry machinery manufacturing	$0	$0	$0	$0
209	Semiconductor machinery manufacturing	$0	$0	$0	$0
210	Vending, commercial, industrial, and office machinery manufacturing	$0	$0	$0	$0
211	Optical instrument and lens manufacturing	$0	$42	$161	$203
212	Photographic and photocopying equipment manufacturing	$0	$8	$28	$36
213	Other commercial and service industry machinery manufacturing	$0	$72	$315	$387
214	Air purification and ventilation equipment manufacturing	$0	$405	$202	$607
215	Heating equipment (except warm air furnaces) manufacturing	$0	$444	$1,367	$1,811
216	Air conditioning, refrigeration, and warm air heating equipment manufacturing	$0	$965	$355	$1,320
217	Industrial mold manufacturing	$0	$289	$142	$431
218	Metal cutting and forming machine tool manufacturing	$0	$12	$39	$50
219	Special tool, die, jig, and fixture manufacturing	$0	$1	$1	$2
220	Cutting tool and machine tool accessory manufacturing	$0	$1	$2	$3
221	Rolling mill and other metalworking machinery manufacturing	$0	$0	$0	$0
222	Turbine and turbine generator set units manufacturing	$0	$0	$0	$0
223	Speed changer, industrial high-speed drive, and gear manufacturing	$0	$0	$0	$0
224	Mechanical power transmission equipment manufacturing	$0	$0	$0	$0
225	Other engine equipment manufacturing	$0	$518	$733	$1,251
226	Pump and pumping equipment manufacturing	$0	$123	$99	$222
227	Air and gas compressor manufacturing	$0	$0	$0	$0
228	Material handling equipment manufacturing	$0	$0	$0	$0
229	Power-driven handtool manufacturing	$0	$9	$48	$58
230	Other general purpose machinery manufacturing	$0	$25	$18	$43
231	Packaging machinery manufacturing	$0	$0	$2	$3

Table B-2
Estimated Output of Child Care Services on Sonoma County Economy
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Sector	Description	Direct	Indirect	Induced	Total
232	Industrial process furnace and oven manufacturing	$0	$47	$96	$143
233	Fluid power process machinery manufacturing	$0	$223	$134	$356
234	Electronic computer manufacturing	$0	$114	$588	$702
235	Computer storage device manufacturing	$0	$0	$0	$0
236	Computer terminals and other computer peripheral equipment manufacturing	$0	$23	$40	$63
237	Telephone apparatus manufacturing	$0	$293	$418	$711
238	Broadcast and wireless communications equipment manufacturing	$0	$9	$55	$64
239	Other communications equipment manufacturing	$0	$979	$495	$1,474
240	Audio and video equipment manufacturing	$0	$146	$446	$593
241	Electron tube manufacturing	$0	$0	$0	$0
242	Bare printed circuit board manufacturing	$0	$0	$0	$0
243	Semiconductor and related device manufacturing	$0	$256	$300	$556
244	Electronic capacitor, resistor, coil, transformer, and other inductor manufacturi	$0	$19	$17	$35
245	Electronic connector manufacturing	$0	$331	$186	$517
246	Printed circuit assembly (electronic assembly) manufacturing	$0	$24	$46	$70
247	Other electronic component manufacturing	$0	$11	$13	$24
248	Electromedical and electrotherapeutic apparatus manufacturing	$0	$1	$4,586	$4,587
249	Search, detection, and navigation instruments manufacturing	$0	$2	$16	$18
250	Automatic environmental control manufacturing	$0	$429	$298	$728
251	Industrial process variable instruments manufacturing	$0	$66	$78	$144
252	Totalizing fluid meters and counting devices manufacturing	$0	$115	$90	$205
253	Electricity and signal testing instruments manufacturing	$0	$136	$169	$305
254	Analytical laboratory instrument manufacturing	$0	$296	$271	$567
255	Irradiation apparatus manufacturing	$0	$0	$0	$0
256	Watch, clock, and other measuring and controlling device manufacturing	$0	$83	$234	$317
257	Software, audio, and video media for reproduction	$0	$0	$0	$0
258	Magnetic and optical recording media manufacturing	$0	$3,275	$4,394	$7,668
259	Electric lamp bulb and part manufacturing	$0	$0	$0	$0
260	Lighting fixture manufacturing	$0	$41	$22	$63
261	Small electrical appliance manufacturing	$0	$0	$0	$0
262	Household cooking appliance manufacturing	$0	$0	$0	$0
263	Household refrigerator and home freezer manufacturing	$0	$0	$0	$0
264	Household laundry equipment manufacturing	$0	$0	$0	$0
265	Other major household appliance manufacturing	$0	$0	$0	$0
266	Power, distribution, and specialty transformer manufacturing	$0	$0	$0	$0
267	Motor and generator manufacturing	$0	$56	$46	$102
268	Switchgear and switchboard apparatus manufacturing	$0	$793	$185	$978
269	Relay and industrial control manufacturing	$0	$323	$222	$545
270	Storage battery manufacturing	$0	$0	$0	$0
271	Primary battery manufacturing	$0	$0	$0	$0
272	Communication and energy wire and cable manufacturing	$0	$799	$238	$1,037
273	Wiring device manufacturing	$0	$368	$152	$520
274	Carbon and graphite product manufacturing	$0	$0	$0	$0
275	All other miscellaneous electrical equipment and component manufacturing	$0	$39	$79	$118
276	Automobile manufacturing	$0	$0	$0	$0
277	Light truck and utility vehicle manufacturing	$0	$0	$0	$0
278	Heavy duty truck manufacturing	$0	$0	$0	$0
279	Motor vehicle body manufacturing	$0	$0	$0	$0
280	Truck trailer manufacturing	$0	$0	$0	$0
281	Motor home manufacturing	$0	$0	$0	$0
282	Travel trailer and camper manufacturing	$0	$0	$0	$0
283	Motor vehicle parts manufacturing	$0	$4,686	$3,636	$8,322
284	Aircraft manufacturing	$0	$0	$0	$1
285	Aircraft engine and engine parts manufacturing	$0	$0	$0	$0
286	Other aircraft parts and auxiliary equipment manufacturing	$0	$0	$0	$0
287	Guided missile and space vehicle manufacturing	$0	$0	$0	$0
288	Propulsion units and parts for space vehicles and guided missiles manufacturing	$0	$0	$0	$0
289	Railroad rolling stock manufacturing	$0	$3	$4	$7

Table B-2
Estimated Output of Child Care Services on Sonoma County Economy
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Sector	Description	Direct	Indirect	Induced	Total
290	Ship building and repairing	$0	$0	$0	$0
291	Boat building	$0	$0	$0	$0
292	Motorcycle, bicycle, and parts manufacturing	$0	$1,649	$1,612	$3,262
293	Military armored vehicle, tank, and tank component manufacturing	$0	$0	$0	$0
294	All other transportation equipment manufacturing	$0	$0	$0	$0
295	Wood kitchen cabinet and countertop manufacturing	$0	$4,102	$2,171	$6,273
296	Upholstered household furniture manufacturing	$0	$0	$0	$0
297	Nonupholstered wood household furniture manufacturing	$0	$1	$2,912	$2,913
298	Metal and other household furniture manufacturing	$0	$10	$409	$419
299	Institutional furniture manufacturing	$0	$391	$88	$479
300	Office Furniture	$0	$1	$1,660	$1,661
301	Custom architectural woodwork and millwork manufacturing	$0	$4	$5	$9
302	Showcase, partition, shelving, and locker manufacturing	$0	$124	$100	$224
303	Mattress manufacturing	$0	$0	$0	$0
304	Blind and shade manufacturing	$0	$420	$974	$1,394
305	Surgical and medical instrument, laboratory and medical instrument manufactu	$0	$22	$2,145	$2,167
306	Surgical appliance and supplies manufacturing	$0	$988	$25,035	$26,022
307	Dental equipment and supplies manufacturing	$0	$3	$50	$53
308	Ophthalmic goods manufacturing	$0	$0	$920	$920
309	Dental laboratories manufacturing	$0	$0	$1,292	$1,292
310	Jewelry and silverware manufacturing	$0	$19	$631	$651
311	Sporting and athletic goods manufacturing	$0	$131	$209	$340
312	Doll, toy, and game manufacturing	$0	$33,371	$8,032	$41,403
313	Office supplies (except paper) manufacturing	$0	$2,524	$524	$3,048
314	Sign manufacturing	$0	$12,358	$7,327	$19,685
315	Gasket, packing, and sealing device manufacturing	$0	$0	$0	$0
316	Musical instrument manufacturing	$0	$21	$637	$658
317	All other miscellaneous manufacturing	$0	$12,186	$9,832	$22,018
318	Broom, brush, and mop manufacturing	$0	$0	$0	$0
319	Wholesale trade businesses	$0	$519,632	$1,491,345	$2,010,977
320	Retail Stores - Motor vehicle and parts	$0	$14,222	$793,476	$807,698
321	Retail Stores - Furniture and home furnishings	$0	$1,927	$224,866	$226,793
322	Retail Stores - Electronics and appliances	$0	$3,458	$332,737	$336,195
323	Retail Stores - Building material and garden supply	$0	$10,597	$414,828	$425,425
324	Retail Stores - Food and beverage	$0	$10,980	$1,028,850	$1,039,830
325	Retail Stores - Health and personal care	$0	$4,442	$408,498	$412,940
326	Retail Stores - Gasoline stations	$0	$4,551	$332,974	$337,525
327	Retail Stores - Clothing and clothing accessories	$0	$4,392	$449,086	$453,478
328	Retail Stores - Sporting goods, hobby, book and music	$0	$2,213	$222,566	$224,779
329	Retail Stores - General merchandise	$0	$7,247	$683,719	$690,966
330	Retail Stores - Miscellaneous	$0	$4,384	$428,981	$433,365
331	Retail Nonstores - Direct and electronic sales	$0	$4,390	$512,727	$517,118
332	Transport by air	$0	$1,270	$2,058	$3,328
333	Transport by rail	$0	$295	$205	$500
334	Transport by water	$0	$338	$2,425	$2,763
335	Transport by truck	$0	$191,643	$238,554	$430,198
336	Transit and ground passenger transportation	$0	$95,367	$139,538	$234,905
337	Transport by pipeline	$0	$0	$0	$0
338	Scenic and sightseeing transportation and support activities for transportation	$0	$91,145	$99,968	$191,113
339	Couriers and messengers	$0	$144,061	$127,652	$271,713
340	Warehousing and storage	$0	$53,372	$74,512	$127,884
341	Newspaper publishers	$0	$138,692	$146,902	$285,594
342	Periodical publishers	$0	$57,392	$38,073	$95,466
343	Book publishers	$0	$25,603	$41,742	$67,345
344	Directory, mailing list, and other publishers	$0	$11,557	$9,141	$20,698
345	Software publishers	$0	$41,564	$18,294	$59,858
346	Motion picture and video industries	$0	$1,162,210	$200,488	$1,362,698
347	Sound recording industries	$0	$7,341	$28,208	$35,548

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Estimated Output of Child Care Services on Sonoma County Economy
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Sector	Description	Direct	Indirect	Induced	Total
348	Radio and television broadcasting	$0	$258,382	$162,765	$421,147
349	Cable and other subscription programming	$0	$157,180	$109,698	$266,878
350	Internet publishing and broadcasting	$0	$42,124	$25,612	$67,736
351	Telecommunications	$0	$1,415,702	$1,031,536	$2,447,238
352	Data processing, hosting, ISP, web search portals and related services	$0	$22,584	$57,113	$79,697
353	Other information services	$0	$1,055	$1,860	$2,916
354	Monetary authorities and depository credit intermediation activities	$0	$1,340,151	$1,874,243	$3,214,394
355	Nondepository credit intermediation and related activities	$0	$810,443	$1,372,964	$2,183,407
356	Securities, commodity contracts, investments, and related activities	$0	$5,759,202	$1,894,967	$7,654,169
357	Insurance carriers	$0	$729,719	$914,479	$1,644,198
358	Insurance agencies, brokerages, and related activities	$0	$404,188	$411,786	$815,974
359	Funds, trusts, and other financial vehicles	$0	$34,513	$318,497	$353,010
360	Real estate establishments	$0	$7,548,327	$4,000,170	$11,548,497
361	Imputed rental activity for owner-occupied dwellings	$0	$0	$7,235,754	$7,235,754
362	Automotive equipment rental and leasing	$0	$46,569	$61,385	$107,955
363	General and consumer goods rental except video tapes and discs	$0	$11,360	$81,796	$93,155
364	Video tape and disc rental	$0	$0	$31,253	$31,253
365	Commercial and industrial machinery and equipment rental and leasing	$0	$77,879	$34,394	$112,273
366	Lessors of nonfinancial intangible assets	$0	$120,030	$93,443	$213,473
367	Legal services	$0	$600,190	$636,897	$1,237,086
368	Accounting, tax preparation, bookkeeping, and payroll services	$0	$1,353,652	$442,151	$1,795,803
369	Architectural, engineering, and related services	$0	$675,874	$170,302	$846,175
370	Specialized design services	$0	$38,502	$29,553	$68,056
371	Custom computer programming services	$0	$111,071	$42,837	$153,908
372	Computer systems design services	$0	$156,800	$57,109	$213,910
373	Other computer related services, including facilities management	$0	$136,879	$48,380	$185,259
374	Management, scientific, and technical consulting services	$0	$513,085	$194,698	$707,783
375	Environmental and other technical consulting services	$0	$109,999	$42,364	$152,363
376	Scientific research and development services	$0	$29,026	$98,168	$127,194
377	Advertising and related services	$0	$288,931	$171,577	$460,508
378	Photographic services	$0	$10,028	$24,787	$34,815
379	Veterinary services	$0	$323	$113,284	$113,608
380	All other miscellaneous professional, scientific, and technical services	$0	$208,562	$82,900	$291,462
381	Management of companies and enterprises	$0	$291,294	$179,626	$470,920
382	Employment services	$0	$1,281,476	$317,673	$1,599,148
383	Travel arrangement and reservation services	$0	$28,578	$80,812	$109,390
384	Office administrative services	$0	$219,337	$60,141	$279,479
385	Facilities support services	$0	$17,596	$5,340	$22,936
386	Business support services	$0	$76,998	$50,088	$127,087
387	Investigation and security services	$0	$142,150	$83,285	$225,435
388	Services to buildings and dwellings	$0	$1,307,536	$422,649	$1,730,185
389	Other support services	$0	$109,363	$76,411	$185,774
390	Waste management and remediation services	$0	$372,976	$226,722	$599,698
391	Private elementary and secondary schools	$0	$0	$304,621	$304,621
392	Private junior colleges, colleges, universities, and professional schools	$0	$41	$16,268	$16,309
393	Other private educational services	$0	$4,849	$324,705	$329,554
394	Offices of physicians, dentists, and other health practitioners	$0	$5	$3,019,779	$3,019,784
395	Home health care services	$0	$0	$210,980	$210,980
396	Medical and diagnostic labs and outpatient and other ambulatory care services	$0	$702	$1,199,806	$1,200,508
397	Private hospitals	$0	$5	$2,336,648	$2,336,653
398	Nursing and residential care facilities	$0	$0	$916,132	$916,132
399	Child day care services	$123,804,244	$0	$199,771	$124,004,015
400	Individual and family services	$0	$0	$387,567	$387,567
401	Community food, housing, and other relief services, including rehabilitation ser	$0	$0	$152,866	$152,866
402	Performing arts companies	$0	$13,737	$74,629	$88,366
403	Spectator sports companies	$0	$132,594	$163,518	$296,112
404	Promoters of performing arts and sports and agents for public figures	$0	$165,837	$139,213	$305,050
405	Independent artists, writers, and performers	$0	$843,200	$77,420	$920,620

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Estimated Output of Child Care Services on Sonoma County Economy
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Sector	Description	Direct	Indirect	Induced	Total
406	Museums, historical sites, zoos, and parks	$0	$0	$67,094	$67,094
407	Fitness and recreational sports centers	$0	$41,316	$103,684	$145,000
408	Bowling centers	$0	$90	$7,348	$7,439
409	Amusement parks, arcades, and gambling industries	$0	$606	$389,884	$390,490
410	Other amusement and recreation industries	$0	$25,032	$152,193	$177,226
411	Hotels and motels, including casino hotels	$0	$54,744	$30,288	$85,032
412	Other accommodations	$0	$553	$690	$1,243
413	Food services and drinking places	$0	$1,985,145	$3,042,846	$5,027,991
414	Automotive repair and maintenance, except car washes	$0	$144,740	$433,416	$578,156
415	Car washes	$0	$4,561	$45,612	$50,173
416	Electronic and precision equipment repair and maintenance	$0	$40,994	$52,924	$93,918
417	Commercial and industrial machinery and equipment repair and maintenance	$0	$88,511	$52,348	$140,858
418	Personal and household goods repair and maintenance	$0	$52,466	$75,103	$127,569
419	Personal care services	$0	$0	$373,590	$373,590
420	Death care services	$0	$0	$83,714	$83,714
421	Dry-cleaning and laundry services	$0	$246,071	$127,373	$373,444
422	Other personal services	$0	$43,203	$310,884	$354,087
423	Religious organizations	$0	$0	$360,871	$360,871
424	Grantmaking, giving, and social advocacy organizations	$0	$159	$483,866	$484,025
425	Civic, social, professional, and similar organizations	$0	$145,910	$497,705	$643,615
426	Private household operations	$0	$0	$155,037	$155,037
427	US Postal Service	$0	$181,326	$199,283	$380,609
428	Federal electric utilities	$0	$0	$0	$0
429	Other Federal Government enterprises	$0	$38,028	$31,665	$69,693
430	State and local government passenger transit	$0	$21,187	$31,000	$52,186
431	State and local government electric utilities	$0	$65,714	$59,212	$124,925
432	Other state and local government enterprises	$0	$1,535,372	$840,241	$2,375,614
433	* Not an industry (Used and secondhand goods)	$0	$0	$0	$0
434	* Not an industry (Scrap)	$0	$0	$0	$0
435	* Not an industry (Rest of the world adjustment)	$0	$0	$0	$0
436	* Not an industry (Noncomparable foreign imports)	$0	$0	$0	$0
437	* Employment and payroll only (state & local govt, non-education)	$0	$0	$0	$0
438	* Employment and payroll only (state & local govt, education)	$0	$0	$0	$0
439	* Employment and payroll only (federal govt, non-military)	$0	$0	$0	$0
440	* Employment and payroll only (federal govt, military)	$0	$0	$0	$0

Sources: 2010 Minnesota IMPLAN Group, Inc., Brion & Associates.