

Cyngor Sir Ceredigion County Council

Executive Summary Report

Childcare Sufficiency Assessment 2011 – 2014

1. Introduction

This Summary Report of the second Ceredigion Childcare Sufficiency Assessment (CSA) provides, in brief, the key findings of the assessment. The full draft report is available upon request or can be accessed electronically via the Ceredigion Information Service Web-site <http://cis.ceredigion.gov.uk>

It is based on the recommended age ranges and follows the guidance as provided by the Welsh Assembly Government (WAG) and it is divided into the following sections:-

- Childcare supply
- Childcare Demand
- Gap analysis
- Conclusions
- Recommendations.

A variety of consultations were carried out with parents, providers, employers, professionals, children and young people. Focus groups were also held. The findings together with quantitative data about the county and supply of childcare form the assessment. Information and research was provided through the council departments. This assessment has been based around the 6 market towns.

2. Childcare Supply

In November 2010, there were **144** registered settings recorded by Care Social Standards Inspectorate Wales (CSSIW) which provide a minimum of **1850** registered childcare places. The total number of childcare places in Ceredigion for which the childcare element of the Working Tax Credit (WTC) can be claimed in 2010 was **1850**, based on all settings requiring fees.

For children aged 0-14 year olds 10,759 (including 60 young people with disabilities aged 15 to 17) there are 17 childcare places per 100 children. This is one registered childcare place for every 5.8 children across the county. The following table provides a breakdown of settings along with registered childcare places provided by (CSSIW) November 2010.

AREA TOWNS	Total No. of registered places	No. of Childminders	Childminder places	No. of sessional care settings	Sessional care places	No. of full day care settings	Full day care places	No. of out of school settings	Out of school places	No. of Open Access Play	Places in Open Access Play	No. of Creche	Creche places
Ceredigion	1850	74	340	38	617	11	386	18	426	2	65	1	16
Aberaeron	143	7	36	4	68	0	0	2	39	0	0	0	0
Aberystwyth	813	16	76	10	181	8	288	11	255	1	13	0	0
Cardigan	332	25	103	6	113	0	0	1	48	1	52	1	16
Lampeter	236	10	54	3	44	3	98	2	40	0	0	0	0
Llandysul	249	13	59	10	146	0	0	2	44	0	0	0	0
Tregaron	77	3	12	5	65	0	0	0	0	0	0	0	0

Childcare provision is not evenly distributed across the county by choice of provision or availability. The number of available places is low in both the Aberaeron and Tregaron area for pre-school provision and school aged children. Provision for the 11-14 age groups remains to be low right across the county. It would seem that provision at present is insufficient for after school care or during the holidays.

Provision for disabled children is provided by mainstream childcare settings, as all are required as part of their registration to provide care for children with disabilities. The specialist Disabilities and Self Help voluntary organization (DASH) provide a limited number of places for disabled children in holiday clubs. The Ceredigion Referral Scheme helps families with children who have special needs to attend the local playgroup. The scheme funds 10 hours a week per child.

Early education is provided the term following a child's 3rd birthday. In September 2010, there were 38 non-maintained (childcare) and 9 maintained settings providing early education for the free 3 year old education. 361 children benefited from the free 3 year old education in non-maintained settings. 884 access this provision in the maintained settings. The Education Department pays £290.00 per term for each individual 3 year old to receive 10 hours of early education for 3 terms (37 weeks). This equates to £870.00 a year in non-maintained settings.

The majority of childcare settings operate within the normal hours of 8:00a.m. – 6:00p.m. five days a week Monday to Friday. Sessional Care Settings and After School Clubs run for an average of 2 to 2½ hours a day. Childminders offer more flexible opening hours to suit parents between 7:00a.m. and 6:00p.m.. Holiday Clubs open between 8:00a.m. and 6:00p.m. 60 childminders informed that they are willing to provide holiday care.

The cost of childcare varies within settings. Compared with the average costs of childcare in Wales, prices in Ceredigion are lower. On average the most expensive form of childcare in Ceredigion is childminders, based on an 8 hour a day = £28.00 per day which for a full week would be £140.00. There is no stability between costs for full day care provision as they vary

between £15.00 and £33.00 per day. The age of the child can impact on the cost. Sessional day care settings rely heavily on the three year old education funding in order to help sustain them. The average price for attending a Cylch Meithrin/Playgroup is between £3.50 and £4.00 a session. Average cost for after school clubs range between £5.00 and £7.00 per session. It appears that the cost for after school clubs is much higher when provided in a day nursery setting than when run in a school environment. The average cost for a holiday playscheme varies between £17.00 and £24.00 per day.

During 2010/11, 179 children benefitted from free childcare provision in the three Flying Start areas – Cardigan, Llanarth and Penparcau. Flying Start gives parents the opportunity to receive the free childcare provision either through a childminder, sessional day care provision or full day care provision. Funding has been utilized to train staff from these sectors. Recently Flying Start identified an increase in population within the Cardigan area. Parents' first choice to access the free childcare provision is through the local Cylch Meithrin. Due to the significant demand for sessional childcare, WAG approved the investment of a substantial sum of money in the school which has agreed to accept children to the school the term before their fourth birthday, thus enabling more available places within the Cylch to accept children from the Flying Start area. However, evidence from this report does still highlight the vacancies available with childminders in the Cardigan area.

The majority of childcare settings in Ceredigion categorise themselves as predominantly Welsh language provision. Out of the 11 full day care settings 10 are classed as Welsh language or bilingual provision. All 38 registered Cylchoedd Meithrin are all classed as Welsh language provision. One playgroup provides bilingual provision. Overall 34 childminders can provide their service through Welsh. 33 childminders provide an English medium service. 5 childminders haven't specified what language their service is provided through. The provision of Welsh speaking childminders/settings is proportionally lower than other types of provision in Ceredigion. 2 After school clubs stated that the provision is English. All the others are either Welsh language provision or bilingual provision. 2 of the Holiday clubs are English medium with the remaining classed as Welsh or bilingual provision.

3. Childcare Demand

During November 2010, out of the **1850** places there were **290** full time vacancies and **575** part-time vacancies available. By area Lampeter and Cardigan had the highest number of full-time vacancies whereas compared to Lampeter and Llandysul in the 2008 CSA. This seems to conflict with parents perceptions. Aberystwyth had the highest number of part-time vacancies. The sector with the highest number of vacancies is the sessional day care provision. Out of school care has seen a decrease in attendance figures as the number of vacancies are increasing. Childminders noted a trend in provision over recent years more parents want part-time places rather than a full week.

The parent/carer survey found that only 32% of parents of children aged 0-14 in Ceredigion regularly use formal childcare provision. The main reasons for the decrease in number of parents accessing formal childcare are costs, choice for different ages, accessibility, availability and information.

Term time provision:

Of those parents using formal childcare they do so for between 6 and 10 hours provision per week. Demand on childcare is higher when there is no cost for it, as seen in the 3 year old education programme and Flying Start where free childcare are highly subscribed. The average spend on childcare ranges between £21 and £50 per week. 89% of parents rely on provision within Ceredigion with 6% outside of Ceredigion and 5% a mixture of both. 58% of parents said their childcare arrangements fully met their needs during term time. 33% answered partly with only 7% saying that childcare arrangements weren't meeting their needs.

Holiday time provision:

Parents remain to rely heavily on family/friends to provide childcare to provide care despite the increase in formal care during this period. Parents use more than 30 hours a week registered care for each child. As the number of hours increases so does the average cost. Between £51.00 and £80.00 is spent. We see a change in responses during the holiday period. Only 45% said yes childcare needs fully met, 38% said needs partly met and 15% said no their childcare needs weren't met.

Parents were asked if they were aware of the Ceredigion Information Service (CIS) with only 30% of parents saying they were. The (CIS) provide parents on up-to-date information on where childcare provision is available along with the latest information provided by settings themselves. The (CIS) encourage regular contact with providers to update their information.

Parents were asked "would they like more Welsh Language provision?" Responses varied between the Welsh and English surveys with the Welsh surveys identifying a need for more Welsh language provision. Roughly half of the English responses suggested there was also a need for more Welsh language responses.

Job Centre Plus informed that it was a very low number of parents, (only 2) that had identified childcare as a barrier for them returning back to work.

Of the employers interviewed 22% identified that childcare is an issue, 56% said it wasn't an issue at all and 22% said it wasn't applicable in employees taking up employment. However, agricultural families have found that childcare provision can be an issue. Shift work was a particular difficulty. Employers are becoming more aware of childcare as an issue it seems that more incentives are being offered to staff including part-time and flexi-time working, temporarily reduced hours, job share and homeworking. Employers are also offering childcare vouchers, information about tax credits and information about childcare provision. The take up of these benefits is very low.

4. Gap analysis

Geographical Gaps

Relating the supply of childcare to demand is a complex calculation that involves many variables.

Childcare Supply

In 2011 there were on average, 17.3 childcare places in Ceredigion for every 100 children aged 0 to 14 years of age. The rate of daycare for pre-school children of 22.4 places per 100 children was significantly higher than the rate for childcare for school-aged children (12.5 per 100 children in after school clubs and 12.9 in school holiday schemes). The rates across the County varied considerably with much lower provision in Aberaeron and Tregaron for both early years and later years childcare when compared with the local populations.

To get to a situation where there were an equal amount of provision in all areas of the County, 406 new childcare places would be required made up of 160 new daycare places (with day nurseries or childminders) to be created along with 166 term-time out of school places and 79 holiday scheme places. (See figure 82 in full report).

Filling the gaps identified above through developing new childcare places would result in a minimum level of provision being available in all areas of Ceredigion and there is some evidence from the levels of vacancies in current settings and in consultation with parents, that there is demand in some of the areas for childcare services to fill these gaps. However, the analysis fails to take into account the geographical, social and economic conditions which would make much of the additional care unsustainable.

Childcare Demand

In bringing together a number of updated socio-economic statistics as set out in the CSA report, along with data on vacancies and parental attitude, a picture of current childcare demand in each area of Ceredigion can be built up.

The following table combines a range of data to summarise the local childcare supply and demand situation in each area of Ceredigion. While this may provide some guidance in developing strategy, further local context will need to be sought prior to any new development of childcare places.

Area	Early Years Care Supply Level	Out of School Care Supply Level	Demand Level
Aberaeron	low	low	low
Aberystwyth	high	high	high
Cardigan	high	high	high
Lampeter	high	high	low
Llandysul	low	high	low
Tregaron	low	low	high

Income Gaps

The average weekly salary for working people in Ceredigion was £375.20 in 2010¹. This was 17% lower than the average for Wales (£451) and 25% less than the average across Great Britain (£500.40). The average hourly cost for childcare in Ceredigion was found to be £3.53 per hour or £24.53 per day. A full week of daycare with a childminder or in a day nursery will cost on average £140. The average cost of childcare in Wales in 2011² was £3.78 per hour. While childcare costs in Ceredigion are therefore 7% lower than the average for Wales, earnings are much lower and therefore childcare will be harder for parents to afford in Ceredigion than elsewhere. Given the data collected on average childcare costs in set against information regarding average wages a number of examples can be constructed that illustrate the affordability of childcare in Ceredigion. It is clear that the proportion of family income spent on childcare is far greater when children require early-years care; and as a proportion of family income, it is greater for lone parents than couples. Whether or not childcare is affordable will depend on a range of other factors – including housing and other household costs – and individual perceptions of what people find affordable. The data reinforces many comments from parents who find childcare expensive, and a major consideration in whether women in particular, participate in the labour market.

Specific Needs Gaps

The National Minimum Standards for Daycare and Childminding, say that all childcare providers should be able to provide for each child's special needs; this could include special educational needs and disabilities. They must have a written policy on special needs. Children with special needs in a childcare setting should have access alongside their peers to the facilities, activities and play opportunities provided, if reasonable. If a childcare setting needs additional equipment or training, they should be able to ask the local authority for help. There are an estimated 823 disabled children in Ceredigion. If they were to take up childcare in the same proportion as all children in the population, then some 288 places would be needed, a proportion of which would need to be supported with additional resources. In reality, provision in Ceredigion is very limited and childcare settings where staff are well trained and have

experience of working with disabled children and children with special educational needs are hard to find.

Time Gaps

The majority of childcare available in Ceredigion operates within fairly 'standard' hours, which in some cases is not meeting the needs of parents working hours. This is particularly the case for parents working shifts or unusual hours. Demand could be met by childminders who with some support and encouragement could be able to cater for flexible working. Information is important here, in providing parents with the links to childminders who are willing to operate outside of normal hours.

In some cases, childcare is not even meeting the needs of parents working 'normal' hours. This is particularly the case for parents who commute, where an extra 30 minutes of childcare at the beginning or end of the day could make a big difference. It would be helpful for childcare providers – especially out of school clubs - to review their hours in consultation with their customers.

5. Conclusions

The main finding is that since the last assessment, the supply of child care places has increased and exceeds current demand. Ceredigion has moved significantly towards achieving sufficiency of child care, but there are sectors where there is still insufficient provision. These are:

- Ceredigion's number of children is decreasing in some areas whilst other areas are seeing an increase in population. Thus the demand for childcare could also decrease with the sustainability of provision becoming more of an issue with less children available to sustain settings. This is especially the case in rural areas.
- The number of people able to speak Welsh remains high across the county. All schools are moving towards providing a fully bilingual education. Due to this move the childcare sector needs to consider that the supply of provision meets the demand for Welsh language provision. In particular there is a gap in Welsh speaking childminders.
- The uptake of the childcare element of WTC has increased since the last CSA was completed. However, statistics show that the uptake remains low. More work needs to be done nationally and locally to raise people's awareness that they can apply for tax credits and, in particular, use childcare tax credits to make childcare more affordable .
- The Government's decision to reduce the childcare element of Working Tax Credit from 80 to 70 per cent in April 2011 will have an impact on families who currently receive it. This could lead to a decrease in the amount of childcare accessed due to parents unable to afford it.
- Childcare providers need to ensure their responsibility in updating information with the CIS on a regular basis.
- Provision along the eastern side of the county is very limited or even nonexistent. More financial support to develop childminders when they start a business could be beneficial.

- Provision for the early years appear to be sufficient. We have a number of childminders across the county along with full-day care provision in two of our towns. The only development required is to target more Welsh speaking childminders in the Aberystwyth, Aberaeron and Tregaron areas as provision available through the medium of Welsh is low. Sessional care is also well distributed across the county. Childcare provider's state that the funding provided, through DECS, does not cover the actual costs of providing the 10 hours free 3 year old education within a sessional care setting.
- Parents see the free breakfast clubs initiative as a form of childcare provision which gives them the opportunity to leave children at the school where they are supervised, whilst they can go to work. This is not the initial aim of the initiative by WAG. The aim is to provide breakfast for children who would otherwise start the day without receiving breakfast.
- After school and holiday provision for school aged children varies greatly between areas. Aberystwyth has a high number of places available whilst Aberaeron and Tregaron both score very low on the number of places available.
- DASH and the Referral scheme support parents of disabled children to take-up pre-school or after school opportunities by the provision of additional paid workers. However, questions were raised by some parents regarding the level of funding available to support them in childcare settings.
- Parents' understanding of childcare is uncertain, as they have asked for clarity on what is meant by childcare.
- Comparing this report with the 2008 CSA we see a significant increase in the amount of care now accessed by family or friends. The reason for this could be the financial situation families are in.
- Part-time employment is the highest form of employment identified from the parent surveys. The main focus for this is that parents try and fit the work patterns in around their children's needs. Parents are also concerned about the push to get everybody back into employment.
- The decommissioning of the NCMA and employing an independent local Childminding Development Officer (following a best value exercise) has been of great benefit to the county, the number of childminders has increased; with a number of childminders also in the process to become registered childminders. They have also had more contact with their development officer, from the first contact, right through the registration process and thereafter.
- Sustainability is a continuing concern across all sectors. All development officers (DO's) received training in providing business health checks during spring 2010. This knowledge is now transferred down to settings via the DO's. Settings must plan ahead as a business.
- New and existing childminders have been given the opportunity to attend a dedicated business start up course through Antur Teifi. This course provides childminders with the knowledge and experience of starting up a new business.
- Many childcare workers have other jobs as well, often in related care or education work. The main reason for this being the income for the childcare work alone simply isn't enough to survive on. Work needs to be done nationally to raise the profile of employment opportunities in the childcare sector whilst at the same time increasing the wages for staff, whilst keeping costs affordable for parents.

- Some employers highlighted the need for more after school and holiday care which is affordable and of good quality.
- Employees who work unsociable hours have difficulty finding suitable provision. They have to rely on family to assist.
- Employers from the smaller businesses reported that childcare is an issue when trying to recruit staff. The larger organizations didn't highlight childcare as an issue. Although employers are offering various benefits to staff, the most popular being childcare vouchers, the actual take up of childcare vouchers is low. There is a tax saving element here which has not been appreciated.
- Following consultation with children it appears that the children are happy with the provision available for them. Each setting offers a vast variety of activities which provides them with new opportunities. Although this survey is about sufficiency of childcare.
- Provision for the 11-14 age groups remains to be an issue from the first CSA carried out in 2008. The main barrier identified is transport. Young people are unable to access provision due to transport not being available to take them home at a later time when the school bus has left.
- It appears that parent's knowledge of the CIS remains to be low. Although knowledge has increased since the last CSA was completed. More work is needed to publicize the role of the CIS. CIS needs to be promoted within communities and the capacity to so needs to be increased.
- More work is needed to dispel parent's perceptions around childcare.
- Young people are unaware of what services are available locally. The CIS have worked on developing a directory of services which aims to inform what provision is available and where. Work needs to be done to publicize this service amongst young people, parents and practitioners working with children and young people.

6. Recommendations

The Local Authority will be responsible for taking forward the recommendations in this report. Resources therefore will need to be targeted at initiatives and projects which will aim to address the recommendations. This will ensure that any new childcare provision is developed alongside the demand. This in turn will assist in getting parents back into employment, training or education which will assist the local economy.

- **Vacancies** – The CIS needs to work with childcare providers to promote the benefits of childcare provision to parents. This in turn will address the high number of vacancies and help address sustainability issues.
- **Insufficiency** – The local authority needs to target specific areas – Aberaeron, Tregaron and Aberystwyth to develop childcare provision in partnership with the childcare umbrella organisations.
- **Welsh language provision** – More encouragement is needed to encourage current childcare providers to increase number of registered places that provide Welsh language provision. More after school provision and childminders through the medium of Welsh in the Aberystwyth area required.

- **Provision suitable for children with severe disabilities** – The local authority needs to provide more training for the childcare sector that increases confidence in providing care for disabled children. More resources are needed to ensure that disabled children receive the same service as all children.
- **11-14 year olds** – The local authority need to develop after school and holiday provision appropriate for 11-14 year olds. There is an opportunity to work with the Youth Service and Leisure Department.
- **After School Care** – Funding is required to continue the work of the Childminding Development Officer in linking childminders with the small rural schools.
- **Holiday provision** – Providers need to promote the service in advance to working parents within the communities. Work in partnership with the CIS to promote the clubs opening session. The provision available doesn't always meet the needs of parents as it isn't available for the whole holiday period in the case of some clubs.
- **Flexibility** – Childminders need to be encouraged to consider offering a service that meets the needs of parents working shifts.
- **Cost of childcare** – The CIS need to promote the benefits of tax credits to working parents. Tax credits can assist parents with up to 70% of the cost of childcare.
- **Information** – The CIS needs more capacity to increase its opportunities to carry out outreach work in promoting the service. More awareness if the CIS is needed. The CIS needs to develop closer links in promoting the service through the local primary and secondary schools.
- **Education** – developments within education need to consider the impact on childcare services across the county when developing new schools.
- **3 year old Education** – The funding to secure the cost per child receiving the free 3 year old funding has remained the same within the authority for a number of years. Staff costs, rent etc are increasing but the 3 year old element provided by the authority isn't. The Education Department needs to consider increasing its funding for the non-maintained sector.
- **Sustainability** – all childcare sectors to look at their organization as a business. Need to plan ahead and not just rely on today. Take advantage of business support on offer from the Childcare Umbrella Organisations.
- **Quality assurance** - is a concern within the national organizations following WAG's decision to postpone the development of national QA schemes. WAG need to develop a national quality assurance scheme appropriate across all childcare sectors.