



# Childcare Sufficiency Assessment

2022 - 2027

**DRAFT**

Childcare Unit February 2022  
Cyngor Sir Ceredigion County Council

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### Executive Summary

#### **Executive Summary:**

This Childcare Sufficiency Assessment (CSA) has been undertaken as part of our Local Authority Statutory duty under:

- the *Childcare Statutory Guidance (2016)*; and
- the circular letter WGC 003 2021/WG21-28 “*Childcare Statutory Guidance (2016): Securing Sufficient Childcare and Child Sufficiency Assessments*” issued on March 15<sup>th</sup>, 2021.

The 2022-2027 assessment was undertaken in-house by Local Authority officers and followed the process identified in the Childcare Statutory Guidance and supplementary guidance. The Authority has a dedicated Childcare Unit under Schools and Culture Services to support and advise the Childcare sector in Ceredigion.

The approach to undertake the assessment required:

- Assessing the demand for Childcare;
- Assessing the supply of Childcare;
- Analysing the gap between demand and supply;
- Identifying barriers to Childcare provision;
- Internal processes require that the Draft Assessment is presented to Learning Communities Overview and Scrutiny Committee prior to public consultation;
- Cabinet to approve the final report prior to publishing and submission to Welsh Government by 30 June 2022;
- Publishing the final Assessment on the Ceredigion County Council Childcare webpage

#### **Methodology:**

- Local Authorities are required to map the local Childcare provision taking into account the type of provision available, number of places, opening times, fees, language of service, age of service for, location of service, vacancies and any additional information relevant to the service in order to assess supply.
- This information was provided to Local Authorities by Care Inspectorate Wales (CIW) through the Self-Assessment of Service Statement (SASS) which was carried out with Childcare providers in July 2021.

- Ceredigion’s Childcare providers achieved a 95.9% response rate to the SASS, and the remaining data was captured by the Childcare Unit officers. The data used was therefore representative of 100% of the active and operational registered settings in Ceredigion as of July 2021.
- A caveat must be placed on all the data and subsequent results and conclusions drawn from them, as there were numerous discrepancies and inaccuracies in the data received. The Childcare Provider attendance and vacancies data information is as of June 2021 when the settings were experiencing attendance issues due to various COVID-19 restrictions and regulations, and did not reflect the service offered by all providers. Technical anomalies in the dataset received from this and Parent/Carer Surveys must be considered. The data set was ‘cleansed’ of inaccuracies, but the data and statistics presented must be used with caution, and in conjunction with current information before drawing any conclusions.
- The demand for Childcare was assessed from the responses received to the Welsh Government on-line Parent/Carer Survey which was open to the public during October 2021. A total of **633** parent/carers responses were received for Ceredigion.
- All consultations were undertaken online due to the COVID-19 pandemic restrictions imposed on a national and local level. These prevented face to face parent/carers consultations as conducted in previous CSAs.
- The Statutory Guidance states that Local Authorities are required to consult with persons with an interest in Childcare, and persons representing those with an interest in Childcare. A Stakeholder Survey was sent to a wide range of Third Sector Services, Health Services, Housing Agencies, Family & Children Centre and Employment Services.
- In line with the statutory guidance, consultation was undertaken with Schools and various Local Authority services with an interest in children and Childcare on the sufficiency of Childcare.
- Consultation will be undertaken with children during February half term in partnership with Play Officers and the work of the Play Sufficiency Assessment. Results and outcomes will be added to this Assessment before public consultation.
- Unregistered Childcare providers were contacted to gather data on their service and uptake by families
- Consideration has been given to other policies, reviews, and frameworks etc. which are likely to impact the Childcare sector in the coming years.
- In line with Ceredigion’s Well-being Assessment, the results have been analysed on the nine Middle Super Output Areas (MSOAs) of Ceredigion, which are community areas used to identify specific assets and challenges relating to well-being.

Borth and Bont-goch
Aberystwyth North
Aberystwyth South
Aberaeron & Llanrhystud
New Quay & Penbryn
Lampeter & Llanfihangel Ystrad
Cardigan & Aberporth

## Findings:

- Having analysed the supply of Childcare provision in Ceredigion and compared it with the demand for Childcare we can see that we have an insufficiency of Childcare places available to meet parents demand. There are pockets of areas where families are reporting difficulties in finding certain types of Childcare, in particular after school, holiday provision and full-day care provision. Since the last assessment 2017 – 2022 we have seen a loss of 375 Childcare places across all Childcare types.
- Accessible high quality and affordable Childcare is essential for families as it enables parents to access education, training or employment opportunities which contributes to the economy of Ceredigion as it enables parents to be economically active.
- The actions identified through this report have been grouped into seven themes:
  - Additional Learning Needs
  - Economy / Sustainability
  - Sustaining / Enhancing provision
  - Sharing Information
  - Welsh Language
  - Recruitment
  - Housing

### Additional Learning Needs (ALN):

- The number of additional learning needs referrals is on the increase for additional support through the Cynllun Cyfeirio scheme. Further work is required to investigate whether the funding allocated is sufficient to be able to provide the required support. We also need to ensure that all Childcare settings are meeting the requirements of the ALN code.

### Economy / Sustainability:

- Ensure the Economic Strategy takes account of the impact that Childcare provision has on the workforce.
- Ensure Childcare provision to enable parents to access education, training, or employment opportunities whilst at the same time contributing to the local economy.

### Sustaining / Enhancing provision:

- An essential element of addressing gaps in provision must be in sustaining existing Childcare provision which are managed and staffed by qualified and experienced practitioners. All types of Childcare settings are experiencing low morale and fatigue following the pandemic.

**Sharing Information:**

- Raising awareness of the professional status of Childcare providers.
- Raising awareness of Childcare provision and financial support available to parents.

**Welsh Language:**

- Welsh language provision is high across the county.
- Support the sector with Welsh language training. The difficulties in recruiting qualified Childcare and play workforce is a challenge for the sector, and there is a need to ensure that the Welsh language levels are supported.

**Recruitment:**

- Work with Welsh Government to investigate increased status and pay opportunities for the Childcare Workforce. Care Inspectorate Wales inspect quality of care for children, but consideration needs to be given to quality of working pay and conditions for the Childcare workforce.

**Housing:**

- Further research is required to look at historical and future impact on settings where there has been / will be significant housing development.

A more detailed breakdown of the actions can be seen in the following section.

**Action Plan**

These recommendations will be used to develop a five-year action plan which will aim to address the issues highlighted. The aim will be for the local authority to work in partnership with the private, voluntary and independent Childcare sector to ensure sufficient, sustainable and flexible Childcare that is responsive to families' needs in line with Welsh Government proposals and policies in an ever-changing landscape. Progress made to address the action plan will be reported to Welsh Government on an annual basis.

**CSA 2022 – 2027 Findings - Identified Themes:**

AREA	THEMES	Links to CCC Business planning	Schools and Culture Business Plans
ALN	Investigate demand for Ymuno support in key locations and address service provision.	1. Through Age Wellbeing (TAW) model	3.10 ALN
ALN	<p>An essential element of addressing gaps in provision must be maintaining Childcare provision which is already operating and run/staffed by qualified and experienced practitioners. All types of Childcare settings are experiencing low morale and fatigue following the pandemic, and reporting this to the Childcare Unit. They are facing the additional pressures of identifying need and putting in place provision for an increasing number of children with developmental delay and additional or emerging needs. This is compounded by the additional tasks required to ensure COVID safety, and additional paperwork needing to be undertaken in relation to this and in applying for grants.</p> <p>Need to commission research into ALN demand and provision, recruitment and retention of qualified staff, including area analysis and link to housing development to address the issues experienced by settings regarding ALN support.</p>	1. Through Age Wellbeing (TAW) model	3.10 ALN
ALN	Need to ensure that all Childcare settings are meeting the requirements of the ALN code.	1. Through Age Wellbeing (TAW) model	3.10 ALN
ALN	<p>Continue to monitor the impact of COVID-19 on pre-school children, children and staff in Childcare settings.</p> <p>Refer to Delphi Study on the impact of COVID-19 on children under age 5   GOV.WALES</p> <p>In addition consider COVID impact on ECEC</p> <p><a href="https://www.childreninwales.org.uk/news/ECECKeyfindings/">https://www.childreninwales.org.uk/news/ECECKeyfindings/</a></p>	1. Through Age Wellbeing (TAW) model	3.10 ALN

<b>ALN</b>	Monitor the funding of provision against number of children requiring additional support in Childcare settings.	1. Through Age Wellbeing (TAW) model	3.10 ALN
<b>Economy/Sustainability</b>	Ensure that any School Development projects include wrap around Childcare (Afterschool Club, Holiday Club and Cylch Meithrin/Playgroup) provision early in the planning phase and liaise with the Childcare Unit (or equivalent) to ensure suitability of such provision.	4. 21st Century Schools	2.2 Infrastructure and Resources
<b>Economy/Sustainability</b>	Ensure that Growing Mid Wales development projects include Childcare and Play provision in their impact assessments and developments	3. Growing Mid Wales	
<b>Economy/Sustainability</b>	Request that Economy & Regeneration Services e.g. planning and property services consider Childcare setting applications as a matter of urgency.		2.2 Infrastructure and Resources
<b>Sustaining / Enhancing Provision</b>	<p>Welsh Government National Minimum Standards (NMS) Review needs to consider the impact unregistered provision is having on registered day care provision.</p> <p>Parents are unable to claim financial help towards the unregistered provision. WG/CIW need to consider a lighter touch registration process for this type of provision which would allow parents to access financial help.</p> <p>Investigate possibility of piloting a registered holiday activity club within a leisure centre in area of demand, therefore allowing parents to apply for financial support for holiday provision and ensuring provision meets a level of expectation within service.</p>	1. Through Age Wellbeing (TAW) model /Play Sufficiency Assessment (PSA)	

<p><b>Sustaining / Enhancing Provision</b></p>	<p>Explore survey response on waiting lists and spaces available as the sample response in this survey was too small to draw conclusions. Establish a methodology to monitor waiting lists and space availability per Childcare type, linking with any proposed housing development information. Investigate potential for some existing providers to increase capacity rather than create new provision.</p>	<p>3. Growing Mid Wales / 2. Community Housing Scheme</p>	
<p><b>Sustaining / Enhancing Provision</b></p>	<p>Due to the vulnerability of the settings, qualified staff are looking elsewhere for more secure employment. Most settings are also voluntary organisations, with a huge burden on volunteer/committee members to manage the current and future delivery and provision of regulated, registered childcare for working parents. The future sustainability of the settings is more related to Committee membership and management rather than demand from parents. Need to work with Business Wales and Welsh Government on developing a pilot scheme for a robust structure for future provision.</p> <p>Over reliance upon Voluntary Committee run provision, an overhaul is needed of the Childcare infrastructure. Potential for Childcare Umbrella Organisations to consider taking on the responsibility for managing the settings.</p> <p>Many Sessional Day Care providers have operated under the ‘Cylch Meithrin’ model for many years (Mudiad Meithrin recently celebrated their 50 Years anniversary). However, demands driven by registration regulations under CIW during the last 20 years and Estyn requirements for those delivering 3-year olds education have increased significantly over this period and there is a need to consider if the model is fit for purpose.</p>		
<p><b>Sustaining / Enhancing Provision</b></p>	<p>Investigate the possibility of establishing a Sessional Day Care provision for 2-3 year olds without impacting on the two Full Day Care Providers and Childminders in Lampeter. Further research into Childcare needs of families living in Lampeter and Llanfihangel Ystrad MSOA community.</p>	<p>4. 21st Century Schools</p>	



<b>Sustaining / Enhancing Provision</b>	Ceredigion Local Authority to work with WG on how to implement the funded Childcare for 2-year-olds across Ceredigion and help with planning any additional provision. Investigate possible capital grant funding opportunities in line with further expansion of the Childcare Offer or 2 year old funding.	4. 21st Century Schools	
<b>Sustaining / Enhancing Provision</b>	Contribute to Welsh Government School Reform consultations and reviews and implement any actions	4. 21st Century Schools	
<b>Sharing information</b>	<p>Need to improve dialogue and partnership working between Childcare Unit and Social Care teams. Need closer working with Social Care teams to ensure recognition of the professional status of all Childcare providers and their role within children's lives.</p> <p>Childminders may feel the burden of the extra workload more acutely as they are lone workers working from their own homes, who often provide their services over extended hours and have their own family commitments. This means that all of their administration work is carried out outside of the hours they offer Childcare provision. Therefore, they would particularly benefit from extended support and recognition from other professionals of the importance they play in the lives of children.</p>		
<b>Sharing information</b>	There is a need to promote Childcare support schemes to parent/carers and businesses, and we propose to take this to the Tackling Hardship Strategy Group which aims to address in-work poverty in Ceredigion		
<b>Sharing information</b>	Raise awareness of the Tax-free Childcare initiative amongst Childcare providers and with parents as this supports Childcare costs for children 0-12 years of age.		
<b>Sharing information</b>	Childcare Unit and partners to undertake more localised promotion of the Childcare Offer to local businesses.		
<b>Sharing information</b>	The term before child is eligible arrange information sessions for parents with Childcare settings so that they can explain the Offer to parent/carers.		

<b>Sharing information</b>	Investigate if the low take-up of the Childcare Offer is down to not wanting to impact accessing the Childcare element support through Universal Credit.		
<b>Sharing information</b>	Monitor local take up of the Childcare Offer, compare national trends. Implement any actions needed to ensure all eligible parents can access the Childcare Offer. Welsh Government need to look at the eligibility to support working parents on low income.		
<b>Sharing information</b>	Work with WG to promote the new guidance being developed to inform agricultural families what information is required in readiness to apply for the Childcare Offer.		
<b>Sharing information</b>	Ensure all Childcare providers are ready for the new digital platform.		
<b>Sharing information</b>	There is a need to promote Childcare support schemes to parent/carers and businesses, and we propose to take this to the Tackling Hardship Strategy Group which aims to address in-work poverty in Ceredigion.		
<b>Sharing information</b>	Childcare Unit require access to Social Media platform to raise awareness of the Childcare Offer. Opportunity to engage with Childcare providers, parents and employers to raise awareness of the scheme and other initiatives to help with help with Childcare costs to mitigate in-work poverty and reduce the percentage of children living in poverty.		
<b>Sharing information</b>	Work with the Tackling Hardship group / establish a task group to carry out further research to identify issues or areas where affordability by parents is also impacting on sustainability of Childcare settings. Research into 20 most deprived areas and any correlation with sustainability of settings, and link with proposed housing development.		
<b>Sharing information</b>	Termly campaign for Setting staff/parents to explain the Childcare Offer.		
<b>Sharing information</b>	Childcare Unit to share responses from the Parent/Carer Survey with Flying Start Team for use in service planning and delivery.		
<b>Sharing information</b>	Local Authority to ensure Statutory duties are being met for the Family Information Service.		

<b>Sharing information</b>	The Childcare Unit needs additional funding as we are undertaking duties (outside our remit) to ensure that the statutory duties are being met.		
<b>Welsh language</b>	Ensure all settings are working towards the Care Inspectorate Wales' Welsh Language Active Offer.	8. Welsh Language	3.7 Welsh Education Strategic Plan
<b>Welsh language / Recruitment</b>	Support the sector with Welsh language training. The difficulties in recruiting qualified Childcare and play workforce is a challenge for the sector, and we must ensure Welsh language levels are supported.	8. Welsh Language	3.7 Welsh Education Strategic Plan 3.6 Post 14 and Post 16 Education
<b>Recruitment</b>	Set up a Childcare Employment and Learning Task group to include Employment and Training Services, School Services, Further Education College to offer appropriate courses and recruit learners. Work with Communities for Work+ and employability programmes to align the employment opportunities and training and advice Ensure input provided to the Post-16 education review to highlight issues around qualifications.	3. Growing Mid Wales	3.6 Post 14 and Post 16 Education
<b>Recruitment</b>	Further investigation is needed to identify what Childcare and Play training opportunities are available in Ceredigion. More work is needed locally to promote a career working in Childcare.	3. Growing Mid Wales	3.6

			Post 14 and Post 16 Education
<b>Recruitment</b>	Ensure CWLWM take note of CSA findings and work with LAs to support the sector.	3. Growing Mid Wales	
<b>Recruitment</b>	Work with Welsh Government to investigate increased status and pay opportunities for the Childcare Workforce. Care Inspectorate Wales inspect quality of care for children, but consideration needs to be given to quality of working pay and conditions for the Childcare workforce.		
<b>Recruitment</b>	<p>Health visitors - Recruitment challenges within Health Visiting is a risk associated with the Flying Start programme, and identified as a considerable risk factor to the delivery of the Healthy Child Wales Programme. There is also an impact on the Childcare sector where staff have to identify and address issues not previously identified due to lack of Health Visitor visits. Mitigation: Local Authority and Health Board representatives have met with Welsh Government to highlight concerns. A recruitment campaign between the Health Board and Local Authority (+ Discover Wales) was carried out in 2021, but there is still a shortage.</p> <p>Work with Public Service Board Partner - Aberystwyth University are launching a nursing degree, and investigate option of developing the Health Visitor qualification in order to retain the learners who go on placement in Ceredigion whilst studying in Aberystwyth.</p>		
<b>Housing</b>	The demand which housing developments place on Childcare settings needs to be monitored.	2. Community Housing Scheme	

<p><b>Housing</b></p>	<p>Further research is required to look at historical and future impact on settings where there has been / will be significant housing development. No additional Childcare spaces have been created in existing or new Day Nurseries; or an increase in registered Childminders in recent years, but they have recorded waiting lists for children under 2 years old. There is also anecdotal evidence of an increase in children requiring additional support in some settings, and any correlation will need to be investigated to ensure adequate funding and support is made available.</p>	<p>2. Community Housing Scheme</p>	
<p><b>Housing</b></p>	<p>Ensure consideration of Childcare provision is included in The Prospectus (Affordable Housing Strategic Delivery Document).</p>	<p>2. Community Housing Scheme</p>	

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## 1 INTRODUCTION / CONTEXT

This Childcare Sufficiency Assessment (CSA) has been undertaken as part of our statutory duty under the *Childcare Statutory Guidance (2016)* and the circular letter WGC 003 2021/WG21-28 “*Childcare Statutory Guidance (2016): Securing Sufficient Childcare and Child Sufficiency Assessments*” issued on March 15<sup>th</sup>, 2021.

The Act places a duty on Local Authorities in Wales “to secure, as far as is reasonably practical, sufficient Childcare to meet the requirements of parents in their area who require Childcare in order to train, to work or to prepare for work”. The Act encourages Local Authorities to work in partnership with the private, voluntary, independent and maintained sector to ensure sufficient, sustainable and flexible Childcare that is responsive to families’ needs.

2022 assessment was undertaken in-house by Local Authority officers and followed the process identified in the Childcare Statutory Guidance and supplementary guidance. The Authority has a dedicated Childcare Unit under Schools and Culture Services to support and advise the Childcare sector in Ceredigion.

The approach to undertake the assessment requires

- Assessing the demand for Childcare;
- Assessing the supply of Childcare;
- Analysing the gap between demand and supply;
- Identifying barriers to Childcare provision;
- Internal processes require that the Draft report is presented to Learning Communities Overview and Scrutiny Committee - prior to public consultation;
- Cabinet to approve the final report prior to publishing;
- Publishing the final assessment on the Ceredigion County Council Childcare webpage following public consultation on the draft assessment;

In addition to the above, the supplementary guidance requested additional information to be taken into consideration which looked at the challenges the pandemic had imposed on the Childcare sector:

- COVID-19;
- Welsh in Education Strategic Plans;
- Data capture and reporting;
- Nanny Scheme.

Two main data sources were used for the purpose of this report:

**i) The Self-Assessment of Service Statement (SASS)**

All registered providers were required to complete the SASS as part of their legal requirement with Care Inspectorate Wales (CIW) in July 2021 unless their service had been voluntarily suspended at the time of collation.

98 Childcare settings were required to complete the SASS from 102 registered providers. The process reminded closed providers to voluntarily suspend or cancel their registrations.

During 2021, CIW had a 90% response rate for all SASS returns in Wales. The Ceredigion completion rate was 95.9% for those that were required to complete their SASS. On further analysis of the non-completions, one Childcare setting had changed their legal entity, and two Childcare settings were new and therefore not required to complete for that period (2021). All outstanding settings completed the information manually with the Childcare Unit and therefore we were able to work with data from 100% of our active and operational registered settings.

**Table 1.1:**

**No. of Services eligible to submit SASS returns by Type of Service**

Local Authority		Ceredigion
Service Type	Child Minder	48
	Creche	2
	Full Day Care	29
	Open Access Play Provision	-
	Out of School Care	11
	Sessional Day Care	8
<b>Total</b>		<b>98</b>

Source: Care Inspectorate Wales

**Table 1.2:**

**% of Eligible Services that submitted SASS returns by Type of Service**

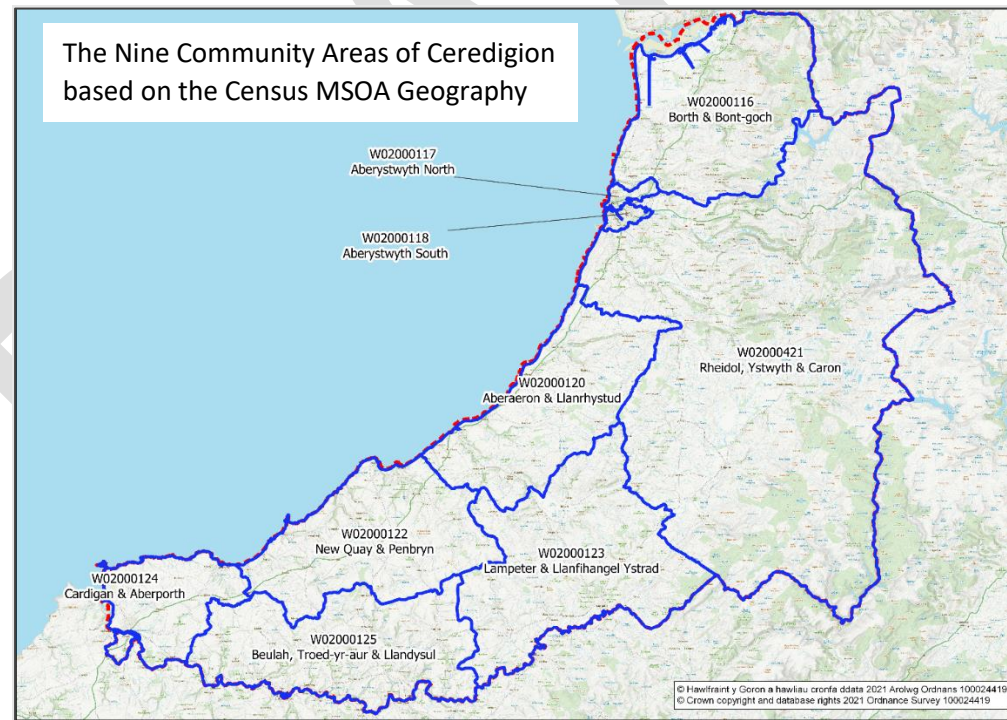
Local Authority		Ceredigion
Service Type	Child Minder	95.8%
	Creche	100.0%
	Full Day Care	93.1%
	Open Access Play Provision	-
	Out of School Care	100.0%
	Sessional Day Care	100.0%
<b>Total</b>		<b>95.9%</b>

**ii) The second main data source was the Parent/Carer Survey for the CSA. This was a national survey developed by Welsh Government in partnership with the all Wales Local Authority Early Years and Childcare Leads (AWARE) colleagues.**

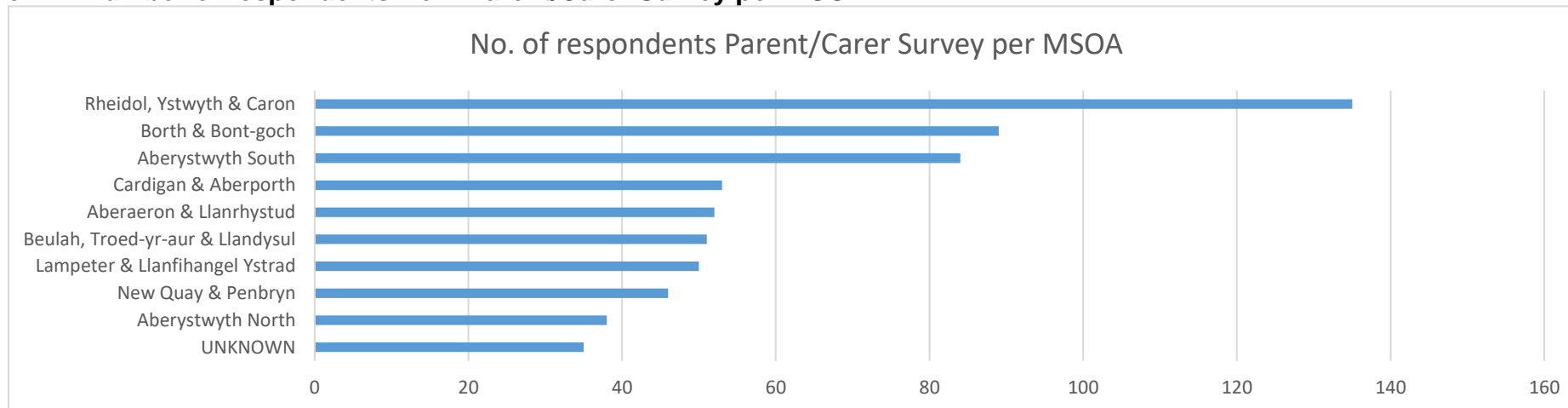
The '**Survey of all parents and carers who use Childcare in Wales**' was launched 1<sup>st</sup> October with a closing date of 24<sup>th</sup> October 2021. This was extended to 31<sup>st</sup> October in order to try and increase the response rate across Wales. This period was chosen to align with the end of the Coronavirus Job Retention Scheme (CJRS) 'furlough' period. Welsh Government shared the survey on their Social Media platforms. Local Authorities were tasked with promoting and sharing the survey locally with parents. The pandemic has led to new ways of working which meant that we have had to rely solely on online surveys this year. A total of **633** parent/carers responses were received.

In line with Ceredigion's Well-being Assessment, the results have been analysed on the nine Middle Super Output Areas (MSOAs) of Ceredigion, which are community areas used to identify specific assets and challenges relating to well-being. The full details are available in the Parent/Carer Survey section of this Assessment (Section 12 & 13)

**Figure 1.1: Map of Ceredigion's Community Areas or Middle Super Output Areas (MSOA's)**



**Figure 1.2: Number of respondents from Parent/Carer Survey per MSOA:**



The CSA must include an action plan detailing actions, priorities and milestones to maintain strengths and address shortcomings identified from the CSA. The full report must be submitted to Welsh Government (WG) by June 2022. Followed by an annual progress report to WG detailing progress made to the action plan. Reporting on progress made against targets set in this plan will be presented on an annual basis to the Learning Communities Overview and Scrutiny Committee.

We have also taken account of the following policies, reviews, frameworks etc. which are likely to impact the Childcare sector in the coming years as part of this assessment which include (but are not limited to) the following:

- [Children in Wales | Key Findings from the impact of COVID-19-19 on Early Childhood Education and Care \(ECEC\) provision](#)
- ECEC Quality Framework – consultation due Spring 2022
- [Curriculum for Wales & A curriculum for funded non-maintained nursery settings](#)
- Welsh Government's Early Years Project: [Renew and Reform Plan](#)
- National Minimum Standards review
- Exceptions Order
- Minding The Future report
- School Day Reform
- An independent review to inform Welsh Government actions and next steps for the professional registration of the Childcare Play and Early Years workforce to report end May 2022
- Qualification Framework for social care and regulated Childcare in Wales

## 2 CONSULTATION

Gathering the views of partners is a critical part of undertaking the CSA. To ensure we complied with the guidance a variety of surveys were developed and distributed during the autumn term. Due to the COVID-19 pandemic we were unable to carry out any face-to-face consultations. Therefore, all surveys have been completed using Microsoft Forms.

The Statutory Guidance states that Local Authorities are required to consult with persons with an interest in Childcare, and persons representing those with an interest in Childcare. A stakeholder survey was sent to a wide range of Third Sector Services, Health Services, Housing Agencies, Family & Children Centre and Employment Services.

Although surveys were widely circulated the response rate has been relatively poor for the different categories throughout the assessment. This could be down to a number of reasons – coupled with the COVID-19 pandemic recovery, there was ‘Consultation fatigue’ amongst partner organisations and the general public during this period as a number of consultations had been undertaken during the same period.

Responses from the consultations can be seen throughout the report as well as in Section 2: ‘*Consultation*’. As outlined in ‘Schedule 2 – Stakeholder Engagement’ consultation was undertaken with the following.

Stakeholder:	Action to comply with guidance:
<ul style="list-style-type: none"> <li>• children;</li> </ul>	<ul style="list-style-type: none"> <li>• Online survey developed in partnership with the Play Sufficiency Assessment to distribute to Out of School Care and play grant recipients.</li> <li>• Childcare and Play specialist commissioned to undertake a face-to-face event with children during February half term 2022 (<b>report to be included before public consultation</b>)</li> <li>• Corporate Communications Team promoted the survey via Social Media.</li> </ul>
<ul style="list-style-type: none"> <li>• parents or carers;</li> </ul>	<ul style="list-style-type: none"> <li>• Welsh Government developed a national Parent/Carer online survey which was promoted locally by each Local Authority in October 2021. Results available in Section 13 and Annex 2.</li> <li>• Reference has also been made to a parents' survey undertaken by Clybiau Plant Cymru Kids Clubs Wales (CPCKC) to gather their views on accessing out of school Childcare in Section 12.</li> </ul>

	<ul style="list-style-type: none"> <li>Evidence regarding Childcare gathered from the Family Support Services Survey and the Public Service Board (PSB) consultation has also been used as evidence.</li> </ul>
<ul style="list-style-type: none"> <li>Childcare providers;</li> </ul>	<ul style="list-style-type: none"> <li>Baseline data gathered from the Care Inspectorate Wales (CIW) Self-Assessment of Service Statement (SASS) July 2021</li> <li>Childcare Provider Survey January 2022. Results available in Section 2.3</li> <li>Unregistered Childcare Providers Survey feedback available in Section 7.2</li> </ul>
<ul style="list-style-type: none"> <li>persons representing children, parents or carers and Childcare providers;</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder and CWLWM Survey October 2021. Results available Section 2.1</li> </ul>
<ul style="list-style-type: none"> <li>persons with an interest in Childcare;</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder and CWLWM Survey October 2021. Results available Section 2 and 3</li> </ul>
<ul style="list-style-type: none"> <li>persons representing those with an interest in Childcare;</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder and CWLWM Survey October 2021. Results available Section 2 and 3</li> <li>Shared with CWLWM partners and Family Information service</li> </ul>
<ul style="list-style-type: none"> <li>persons representing local employers and employer organisations;</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder and CWLWM Survey October 2021. Results available Section 2 and 3</li> <li>Employer Survey November 2021. Results available Section 2 and 3</li> </ul>
<ul style="list-style-type: none"> <li>local employers;</li> </ul>	<ul style="list-style-type: none"> <li>Employer Survey November 2021. Results available Section 2.2</li> </ul>
<ul style="list-style-type: none"> <li>neighbouring local authorities;</li> </ul>	<ul style="list-style-type: none"> <li>See Cross Border – see Section 20</li> </ul>
<ul style="list-style-type: none"> <li>schools;</li> </ul>	<ul style="list-style-type: none"> <li>Schools Childcare Survey 2021. November 2021. Results available Section 2.4</li> </ul>
<ul style="list-style-type: none"> <li>further education colleges</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder and CWLWM Survey October 2021. Results available Section 2.1</li> </ul>
<p>Local Authorities must also consult with the following partnerships and organisations in conducting their CSA:</p>	
<p><b>Stakeholder:</b></p>	<p><b>Action to comply with guidance:</b></p>
<ul style="list-style-type: none"> <li>Safeguarding Children Board;</li> </ul>	<ul style="list-style-type: none"> <li>Ceredigion Local Operational Group (LOG) which comes under the governance of the Mid and West Wales Regional Safeguarding Board (CYSUR). Feedback available Section 3.2</li> </ul>
<ul style="list-style-type: none"> <li>Welsh Medium Education Forum</li> </ul>	<ul style="list-style-type: none"> <li>Welsh in Education Strategic Plan meetings attended by Childcare Strategic Manager, and input provided in the development of the Strategy</li> </ul>

<ul style="list-style-type: none"> <li>• Play Monitoring Group</li> </ul>	<ul style="list-style-type: none"> <li>• Members of Early Years, Childcare and Play Strategy Group all received the Stakeholder and CWLWM Survey October 2021.</li> </ul>
<ul style="list-style-type: none"> <li>• Job Centre Plus</li> </ul>	<ul style="list-style-type: none"> <li>• Stakeholder and CWLWM Survey October 2021. Results available Section 3.5</li> <li>• Department for Work and Pensions – PaCE (Parents and Childcare in Employment) Project officers are members of the Early Years, Childcare and Play Strategy Group</li> </ul>

As well as working with partner organisations, consultation was undertaken with other service areas within the Local Authority, which included the Economy Section (Section 3.7), Education and Early Years (Section 17), Flying Start (Section 17.2), Housing & Housing Development (Section 3.7), Transport (Section 3.7), and Social Care (Section 3.2). They were asked to report on *'any significant issues or changes which have happened over the period which have impacted on or have influenced the Childcare market in any way e.g. housing development, employment development etc., or future changes that will have an impact on the Childcare market'*.

The Performance and Research Team under Partnerships and Performance Service have assisted with data and demographic information Section 6) and Local Well-being Needs Assessment information (Section 5).

**2.1 STAKEHOLDER SURVEY RESULTS**

From the stakeholders survey 15 responses were received which included 9 from external services and 6 from Council services. We received a response rate of 21% feedback from 43 external agencies (including all CWLWM partners) compared to 50% in the 2017 Assessment.

<b>Stakeholders / Partners</b>	<b>CWLWM partners</b>	<b>Ceredigion County Council</b>
Coleg Ceredigion	Clybiau Plant Cymru Kids Club Wales	Ceredigion Council - PSB partnerships team
Community Council	Early Years Wales	County Councillor
DASH Ceredigion	Mudiad Meithrin	Early Years Team /Tim Blynnyddoedd Cynnar
Lampeter Family Centre	NDNA Cymru	Flying Start/Dechrau'n Deg Ceredigion
Plant Dewi	PACEY Cymru	Lampeter Leisure Centre

Separate responses were provided by the Safeguarding Local Operational Group under CYSUR, and Planning and Housing services and therefore not included in the Stakeholder Survey results:

Partners were asked to rate the following statements as poor, satisfactory, good, excellent or don't know:

- Quality of provision
- Range of Providers
- Number of Places
- Affordability
- Flexibility of provision and sessions
- Suitability of opening times
- Location and accessibility of Childcare
- Bilingual / Welsh provision.

The following table highlights how stakeholders rated the above statements from poor to excellent. Not all partner agencies felt they had enough knowledge to provide a response for all questions.

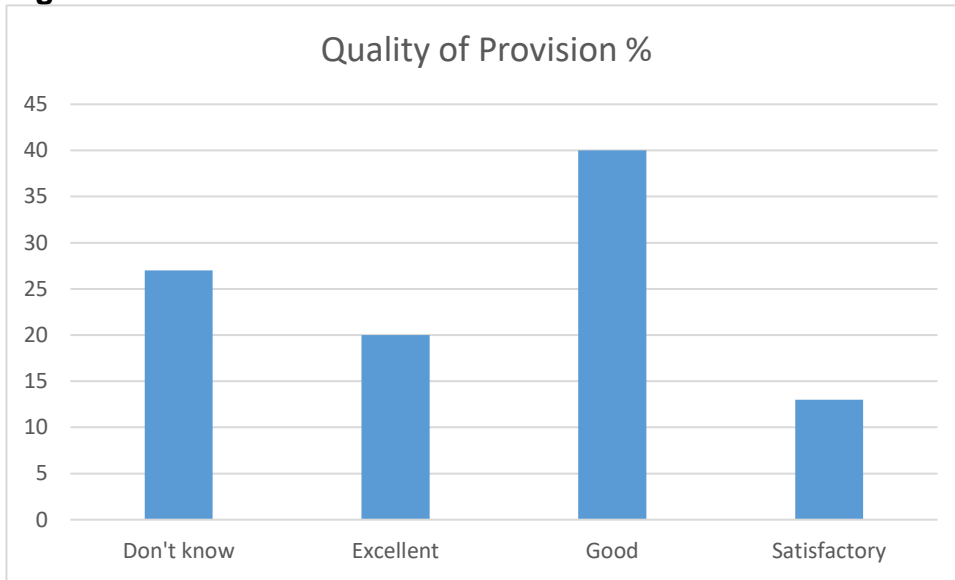
**Table 2.1.1: Stakeholder views on Childcare provision**

	Poor	Satisfactory	Good	Excellent	Don't Know
Quality of Provision		2	6	3	4
Range of Providers	1	4	5	1	4
Number of Places		6	4	1	4
Affordability	1	7	4	1	3
Flexibility of provision and sessions	4	2	5		4
Suitability of opening times	3	3	3	1	5
Location and accessibility of Childcare	3	5	2	1	4
Welsh Provision		2	7	2	4

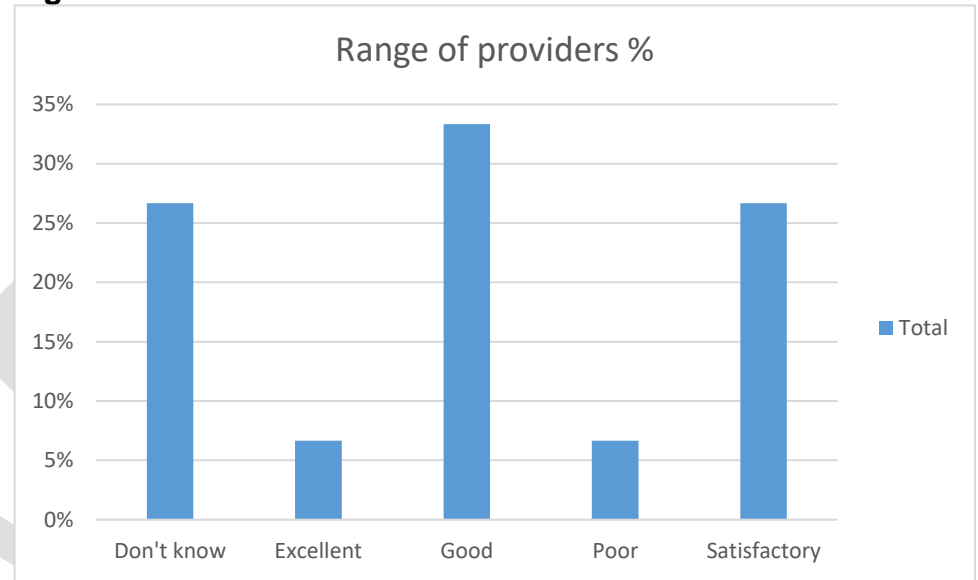
1. Regarding the range of registered Childcare that is available to parents and carers in Ceredigion, how would you rate the following?



**Figure 2.1.1**



**Figure 2.1.2**

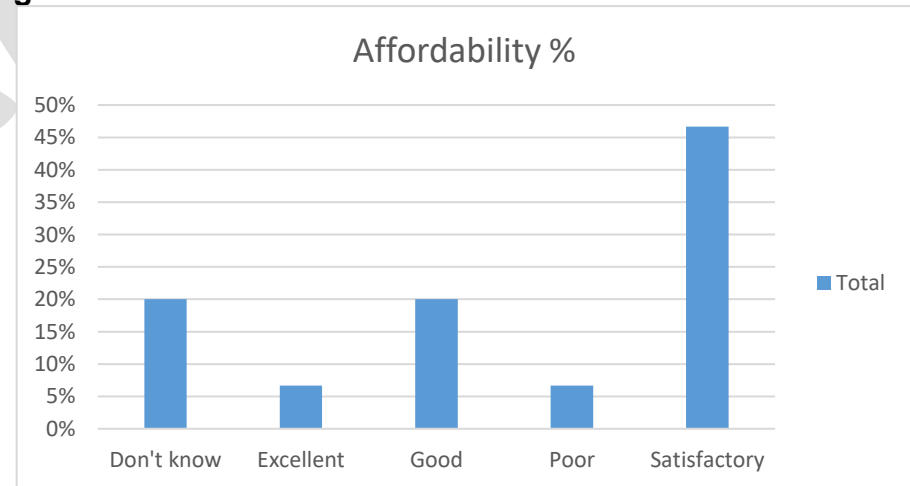


- 40% of stakeholders reported that the quality of provision is good and 20% reported excellent.
- 33% reported that the range of providers is good but 27% identified that the range of providers is satisfactory.

**Figure 2.1.3**

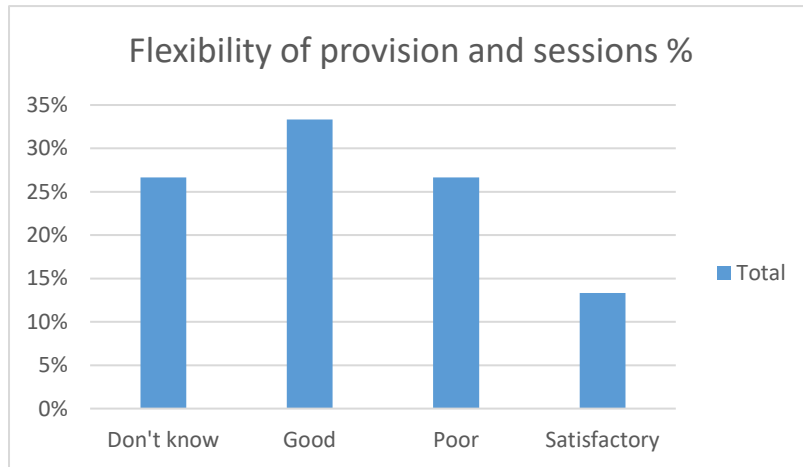


**Figure 2.1.4**

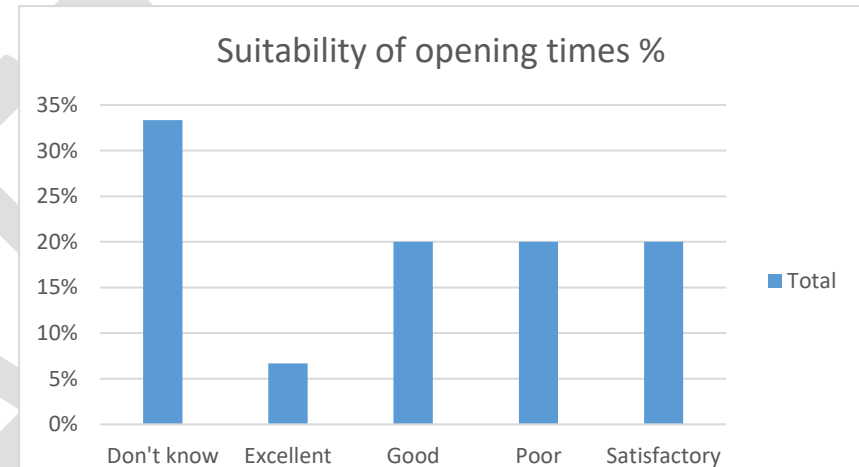


- 40% rated the number of places available as being satisfactory with 27% good.
- 47% informed that the affordability is satisfactory.

**Figure 2.1.5**

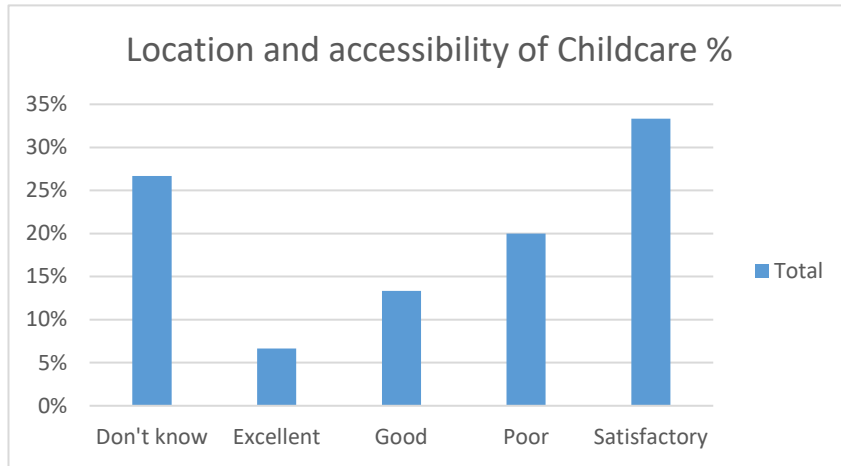


**Figure 2.1.6**

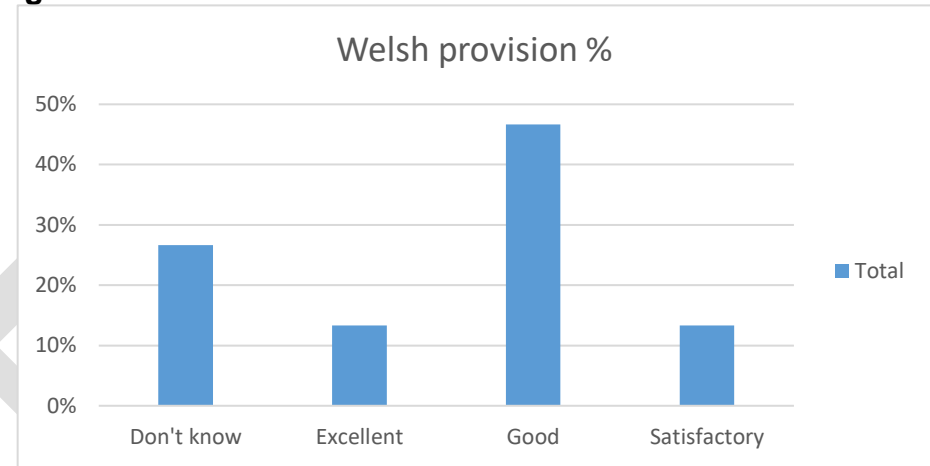


- 33% reported that the flexibility of provision and sessions were good but 27% reported it as poor.
- The responses were equal in terms of suitability of opening times between good, poor and satisfactory.

**Figure 2.1.7**



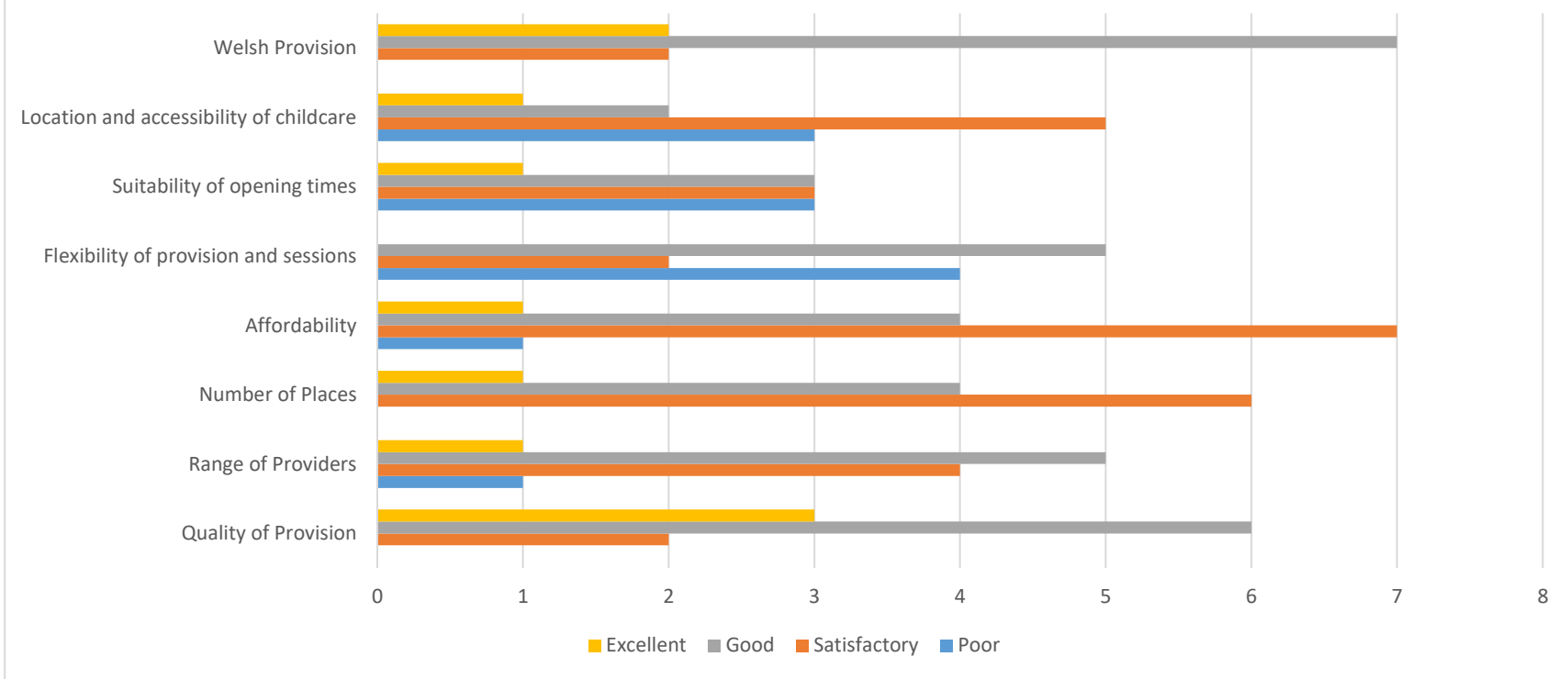
**Figure 2.1.8**



Not all partner agencies felt they had enough knowledge to provide a response for all questions, therefore we removed the response for 'Don't Know' from the summary graph below for clarity:

**Figure 2.1.9: Stakeholder views on known current provision**

### Stakeholder views on known current provision



## 2.2 EMPLOYER SURVEY

### Methodology

The Employer Survey was sent electronically to businesses in Ceredigion by the Economy and Regeneration Service within Ceredigion County Council, and to each Town and Community Council, town Business Clubs and CAVO requesting them to distribute to their members. The survey was also shared with other County Council service areas to distribute e.g. the Domiciliary Care team with a request to share with the

care agencies contracted to deliver services. The survey was also sent directly to approximately 40 small, medium and large employers who have previously engaged with the Assessment.

## RESULTS

We received 8 responses from across the public, private and third/voluntary sector. 75% were from the private sector, with 12.5% response from public and third/voluntary sector respectively. 25% were completed in Welsh and 75% completed in English. The low number of responses needs to be taken into account and are not representative of the area. See table for comparison.

**Table 2.2.1: Employer Survey response**

<b>Business Category</b>	<b>Survey response rate</b>	<b>Ceredigion businesses</b>
Micro enterprises (0-9 employees)	37.5%	91.9%
Small enterprises (10-49)	50%	7.3%
Medium business 50 – 249 employees	0	0.6%
Large enterprises (250+ employees)	12.5%	0.1%

### The following sectors were represented in the responses:

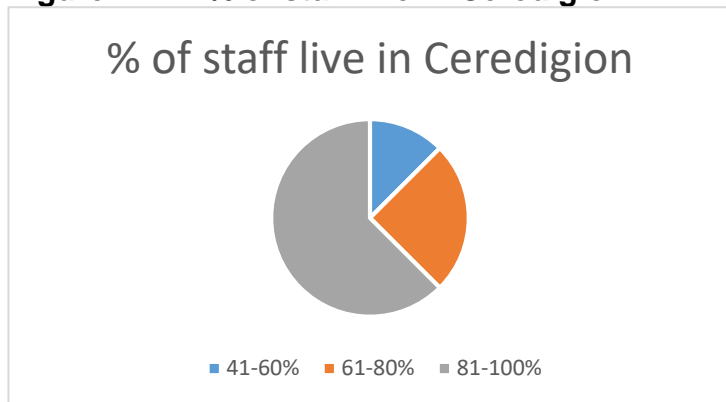
- Accommodation and Food Services
- Arts, Culture and Tourism, Sport and Recreation
- Building and Construction; Mining and Quarrying
- Finance, Banking, Information and Communication; Insurance, Legal or other Business Support services
- Health and Social Care
- Public administration
- Other services (Printing and publishing and cleaning services)

88% of employers stated that 61% or more of their employees lived within the local authority area.

Approximately 2302 employees were represented in the results, with 60% working 30 hours or more; or 77% who work 16 hours or more.

A total of 40% worked less than 30 hours a week.

**Figure 2.2.1: % of staff live in Ceredigion**



**Table 2.2.2: Staff working hours**

Approximately percentage of staff	Work less than 16 hours per week	Work between 16 hours and 30 hours per week	Work 30 hours or more
%	23	17	60
% across Ceredigion (Census 2011)*	12.4%	20.8%	66.8%

\*figures from Census 2011, so need to be used with caution. The proportion working 16 to 30 hours and 30 hours or more are slightly lower than Ceredigion figures in the survey returns. The proportion working less than 16 hours a week is almost twice as high in the survey returns than across Ceredigion as a whole.

50% of respondents had a female workforce of over 61%. In comparison with the workforce at large in Ceredigion, 46.9% are female and 53.1% are male

**Business hours and working arrangements:**

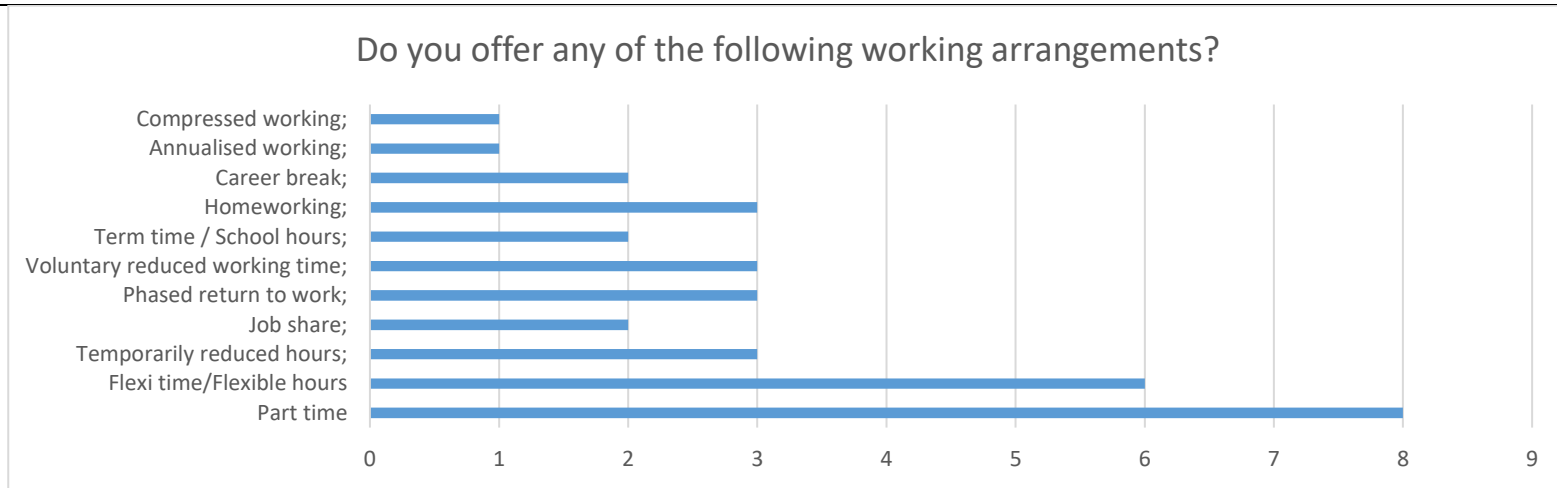
50% of respondents operated outside the hours of 8:00 a.m. – 6:00 p.m. and included early morning, evening, overnight and weekend shifts during unsociable hours.

**Working arrangements**

The following working arrangements were offered to employees:

Part time working was offered by all employers, and 75% offered flexi-time / Flexible hours. The greatest range of options for variable working arrangements for employees were offered by the public and voluntary sector.

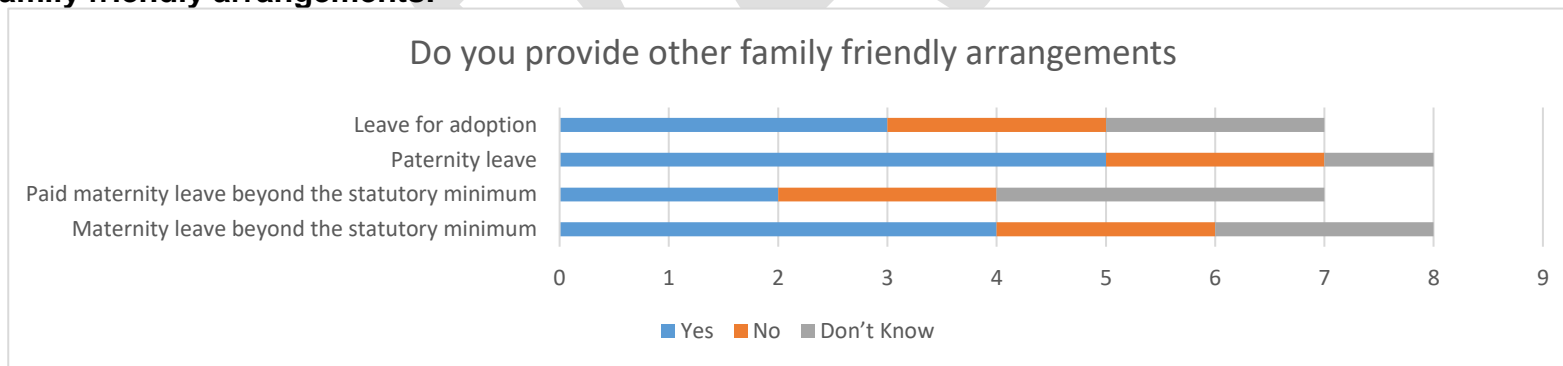
**Figure 2.2.2: Working arrangements**



**Other family friendly arrangements offered by employers are shown below.**

The greatest range of options were again offered by the public and voluntary sector to their employees, with most of the private sector responding 'No' or 'Don't know' to the following options:

**Figure 2.2.3: Family friendly arrangements:**



**COVID-19 impact on employers**

Employers were questioned on the impact COVID-19 had on the workforce and changes in the way the workforce accessed flexible working arrangements. All sectors reported that “More staff working / continuing to work from home” with one response stating that “A significant

*majority of the workforce who were previously office based have been working at home since the beginning of the pandemic, and will continue to do so for at least the next few months”*

The Private sector in particular reported a loss of 38% of its workforce, *“and inability to find quality skilled workforce”*; whilst another reported that staff *“don't want to work as many hours!”* One reason for this was stated as *“fewer people are available or willing to work due to the uncertainty of restrictions/school closures etc. They seem to have started relying on one income more and are unwilling or unable to offer the hours that we need covered.”*

These issues have an effect on affect business continuity, and individual employees who may be restricted in their working hours due to Childcare issues. But these changes also affect the Childcare providers, who have reported unused spaces – especially in after school provision. (See Table 7.4.4)

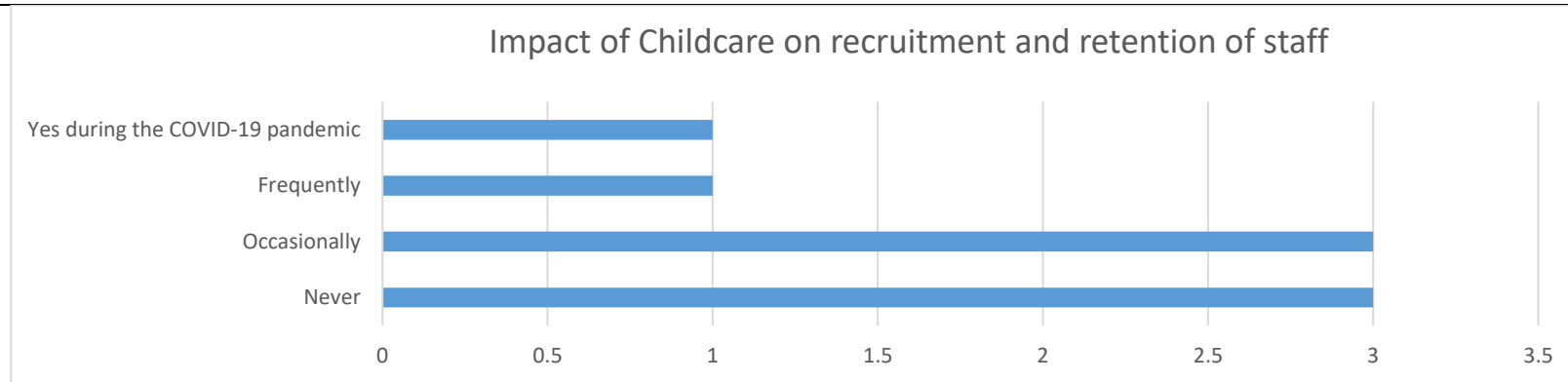
When asked whether COVID-19 changed the working patterns and workforce needs, the respondents' comments included the following:

- *Early / late shift instead of everyone starting and finishing at the same time*
- *For those previously office based the need for greater flexibility in working patterns was evident from the start as many were having to also deal with Childcare issues following school closures or during school holidays. Balancing these needs against that of the service delivery has proved difficult in some areas but there remains a level of flexibility necessary which is likely to still be required as we move to new hybrid ways of working in the future.*
- *Allowing more flexible working (early hours, late working - to enable staff to care for their children while there was a lack of school).*
- *Yes, unable to find quality skilled men, this probably was happening before the impact of Covid however it seems to be worse now.*

When asked if Childcare had an impact on recruitment or retention of staff two-thirds of the respondents reported that it had had an impact.

**Figure 2.2.4: Impact of Childcare on recruitment and retention of staff**





The National Day Nursery Association (NDNA) are members of the CWLWM umbrella group and manage a Powys & Ceredigion network. They reported that recruitment was the biggest issue facing members at the moment, in particular qualified staff at level 3.

*“Members are also facing short term staffing issues owing to staff having to isolate when testing positive. Guidance that allows children to attend nursery without testing has resulted in more staff testing positive. In addition some nurseries have unvaccinated staff who need to be risk assessed for and have to isolate if contacts of a positive case. While Grant funding is addressing this to a certain extent, nurseries cannot rely on this money being available in the future and cannot forward plan.”*

The comments regarding the availability of Childcare and its impact on the recruitment or retention of staff (pre and post COVID-19 pandemic) included:

*“We operate all year and cannot offer term time only work, therefore people need to be available to work during school holidays. There is little available in terms of Childcare for this. Also the cost of out of school Childcare is astronomical and makes it unviable for someone to go to work”*

*“The lack of availability of Childcare in certain areas of the county or for those starting earlier or finishing later has resulted in job offers having to be declined or staff leaving their roles in a few situations.”*

**The effect on business continuity was highlighted as:**

*“Yes, frequent issues with after school clubs and breakfast clubs being cancelled with little or no notice, no provision for holiday clubs at an affordable rate. All these things mean that mums with children are basically excluded from the workforce if they don't have extended family to help”*

However, the county has a large proportion of micro enterprises (0-9 employees) which make up 91.9% of all businesses, and during the pandemic many had to juggle Childcare and running their small/family business:

*“As a family run business we have thankfully been able to utilise our own child care”*

### **Childcare impact on employees:**

Survey feedback highlighted that 75% of employers experienced Staff absences due to Childcare issues

The availability of Childcare also had an impact on attendance or working patterns:

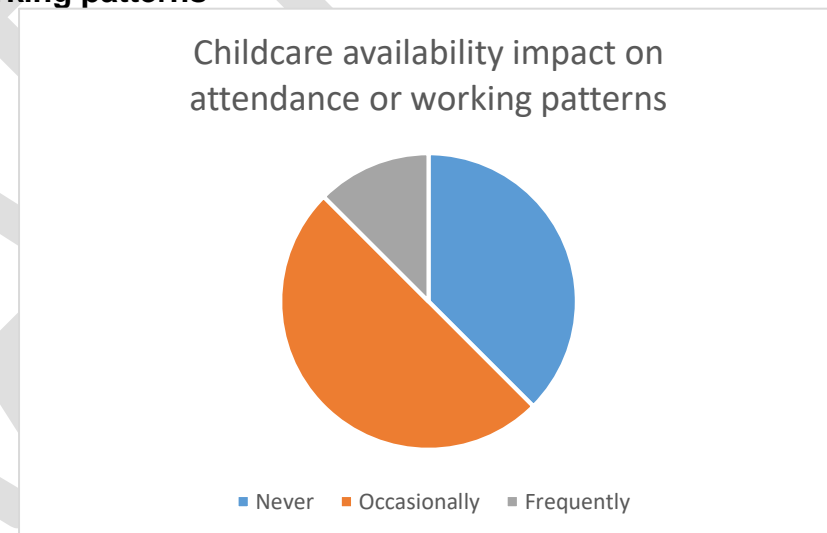
*Comments on the way that the availability of Childcare had an impact included:*

*“Staff unable to come to work when children are unwell or having to isolate. Family and friends unable to help (if they're in the circle of provision to start with)”.*

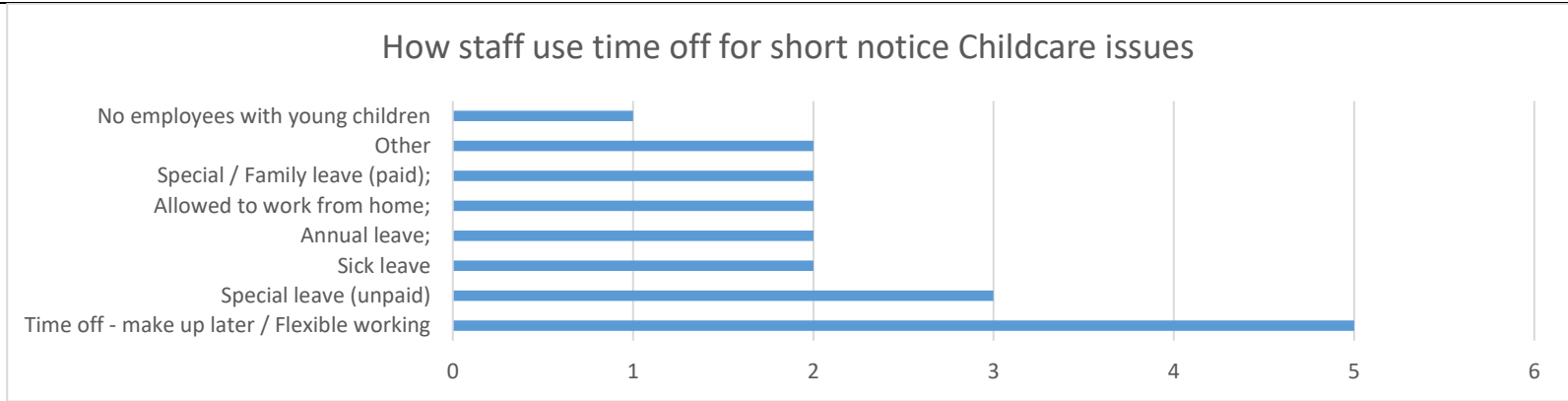
*“The complete absence of any afterschool activity these days in schools. This all means that mums who work for me have to cancel shifts at very short notice or no notice at all which upsets clients because I don't have other people I can send in their place. We've lost a few clients because of this issue.”*

Not all respondents employed parents with young children, but most offered Flexible working options to help parents deal with Childcare emergencies at short notice e.g., to look after a sick child or because of difficulties with Childcare. Employees in the private sector are most likely to use annual or special leave or take unpaid leave, and employers are aware that this affects the working terms and conditions. There are more options for parent/carers who work in the public or voluntary sector. The private sector which responded offered few opportunities to work from home, due to the nature of their business.

**Figure 2.2.5: Childcare availability impact on attendance or working patterns**

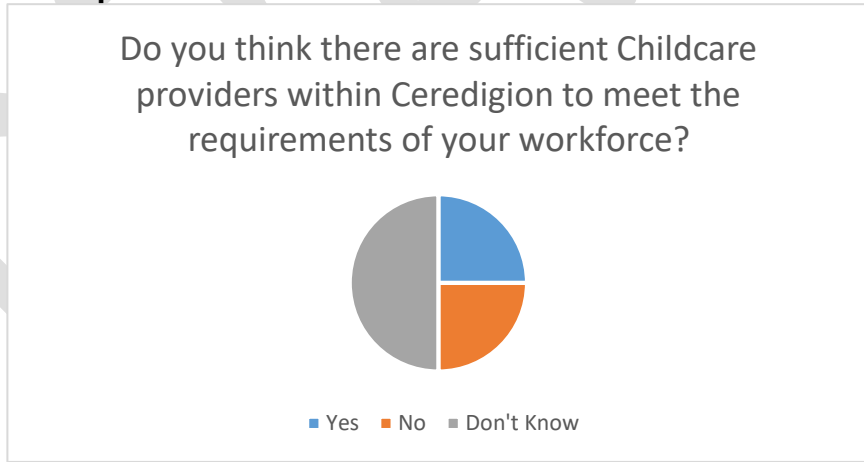


**Figure 2.2.6: How staff use time off for short notice Childcare issues:**



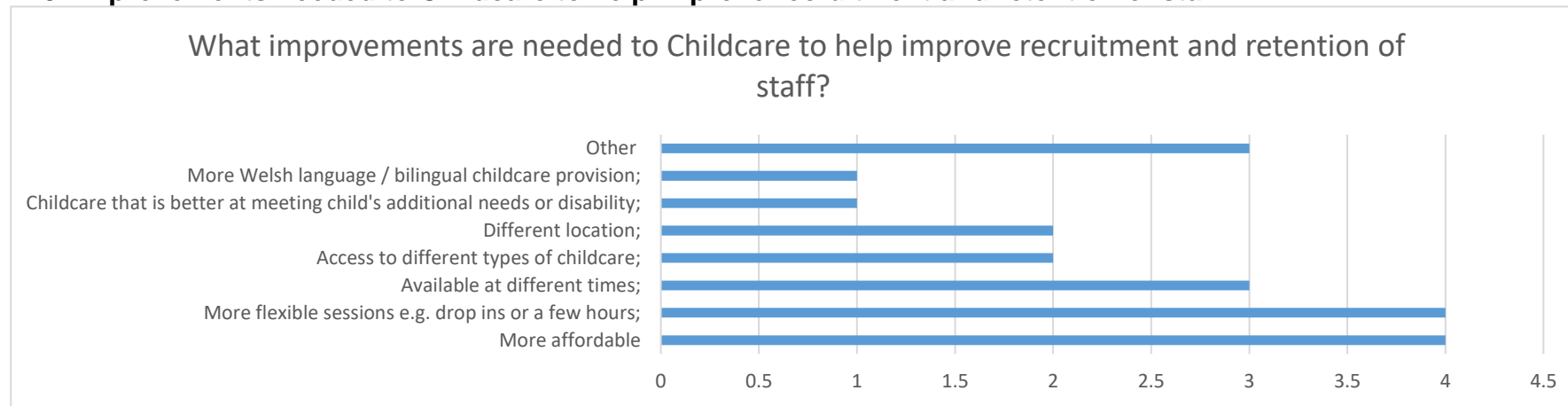
Employers were not confident on whether there was sufficient Childcare provision within Ceredigion to meet the requirements of their workforce. The Childcare provision fluctuates regularly regarding childminders, whereas the Day Nurseries and Playgroup provision remain relatively stable. However, there have been closures during the last two years – especially in the After School sector, and it is therefore of paramount importance that providers continue to update their service information on the Family Information Service /Dewis Cymru website to keep parents and employers informed.

**Figure 2.2.7: Sufficient Childcare to meet requirements of workforce**



The survey respondents indicated that the improvements highlighted below were needed in Childcare provision to help improve recruitment and retention of staff:

**Figure 2.2.8: Improvements needed to Childcare to help improve recruitment and retention of staff:**



Respondents who requested Childcare 'Available at different times' above, mostly indicated requiring hours between 7am and 9am, after school (until 6pm), After 6pm and weekends.

Preference of location was indicated as closer to home and closer to child's school, and the majority requested more Crèche (occasional Childcare), After School Club and Holiday provision. Some indicated requiring breakfast club provision, as well as full day care (e.g., Childminder and Day Nurseries).

The results were not analysed according to MSOA region due to the low number of responses, but the challenges faced by employers are also reflected in the Parent/Carer and Childcare provider results which show geographical gaps in some types of provision (see map in **Figure 8.5: All registered Childcare Providers**)

For Childcare providers to offer early starts / late finish and weekends, the demand needs to be there to ensure sustainability of provision. Due to the relatively low population and rurality of the area, the low demand coupled with staff recruitment issues results in many providers being unable to offer these additional hours/services.

However, individual childminders can provide flexibility, as evidenced in their services. Parents should always contact Childcare providers directly regarding their requirements and initiate the dialogue with them.

**Childcare Related Benefits for the Workforce**

From the small response we received it was clear that little information is shared with employers when it comes to promoting Childcare related benefits to the workforce. It is unknown if this is the same across other employers within the county. Data showed that there was a low to medium take up of the Childcare voucher scheme (which is being phased out/ no new applications have been accepted since October 2018) and a medium take up of interest in the Childcare element of working tax credits / universal credit for Childcare and other schemes. Employers did demonstrate they would welcome the opportunity to receive more information about the different schemes available. *“Need more information - should be sent out to all businesses”. “Awareness of their existence or lack of understanding on who to contact.”*

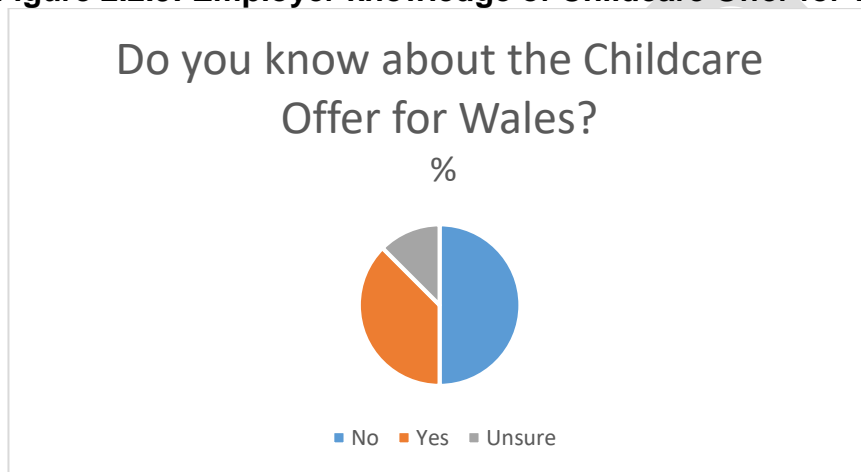
**ACTION: There is a need to promote Childcare support schemes to parent/carers and businesses, and we propose to take this to the Tackling Hardship Strategy Group which aims to address in-work poverty in Ceredigion**

**Childcare Offer for Wales:**

50% employers were not aware of the Childcare Offer. 12.5% of respondents felt the Offer had helped unemployed families with 3–4-year-olds to gain or increase employment.

**ACTION: Childcare Unit and partners to undertake more localised promotion of the Childcare Offer to local businesses.**

**Figure 2.2.9: Employer knowledge of Childcare Offer for Wales**



## 2.3 CHILDCARE PROVIDER CONSULTATION

### Methodology

The Self-Assessment of Service Statement (SASS) formed the baseline for analysing the supply of Childcare available in Ceredigion. Registered Childcare providers were required to complete the SASS as a duty under their registration. See information regarding response rate to the SASS in the introduction. An analysis of the SASS can be found in Section 7. The Childcare Unit contacted unregistered providers separately. To gain further insight into how providers view the Childcare market in Ceredigion, the impact COVID has had on their provision and what their long-term plans are for the provision, we sent out an online survey to ask further questions.

### Summary:

32 responses were received which represented 35% of registered providers (from a total of 91 registered providers). 2 responded in Welsh and 30 in English. 8 anonymous responses were received which represented the different Childcare types.

The questions and responses are collated below. We have not analysed the qualitative feedback or data per Middle Super Output Area (MSOA) due to the ability to identify settings. However, a response was received from each MSOA area and therefore each area has been represented. The relatively small response sample may not be totally representative of the views of all Childcare settings.

### Results:

**Type of Childcare Provider** – settings were able to tick all services that applied to them from the following list:

- Childminder
- Day Nursery
- Cylch Meithrin/Playgroup
- After School Club/ Holiday Playscheme
- Breakfast Club
- Other

**Table 2.3.1: Childcare Provider Consultation responses**

Type of Childcare Provider – all that apply	Childminder;	Cylch Meithrin / Playgroup;	Cylch Meithrin / Playgroup; After School Club / Holiday Playscheme;	Day Nursery;	Day Nursery; Cylch Meithrin / Playgroup;	Day Nursery; After School Club / Holiday Playscheme;	After School Club / Holiday Playscheme;	Breakfast Club	TOTAL
TOTAL	13	8	2	3	1	2	3	0	32

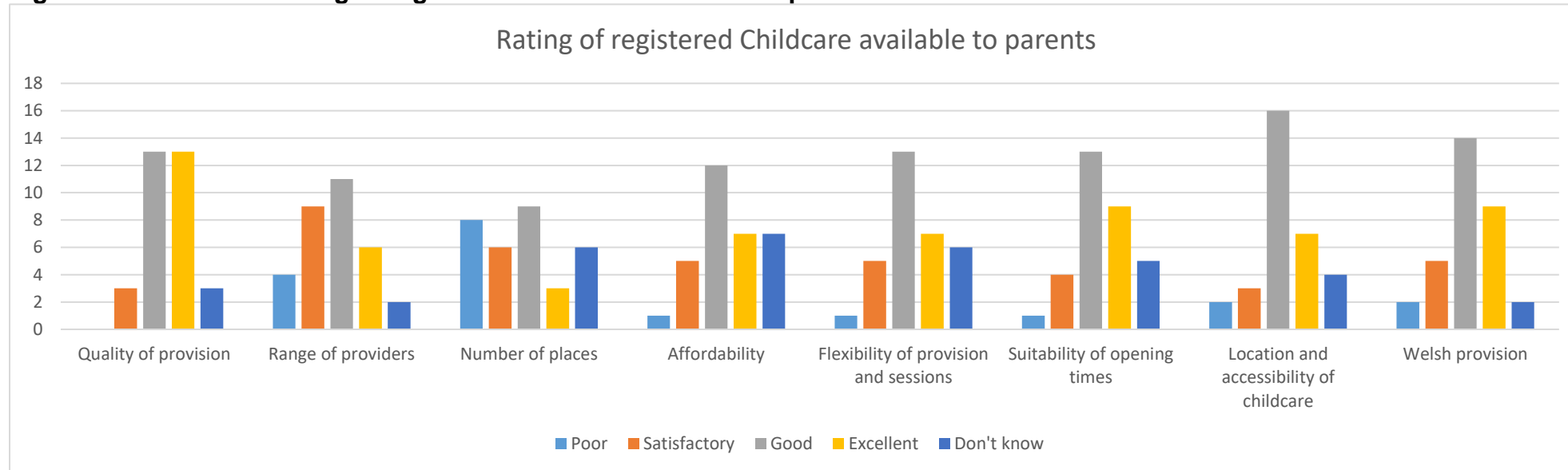
**Range of registered Childcare that is available to parents and carers:**

Childcare providers were asked to rate from poor to excellent the range of registered Childcare provision that is available for parents/carers in their area. The quality of provision was rated as good or excellent, but the range of providers and number of places were a concern, which indicates that providers are aware of the gaps in choice of Childcare type and supply in some areas for children of all ages. Location and accessibility of Childcare was rated as mostly good, and this reflects the good geographical spread of Playgroups throughout the county, which mostly provide Welsh language Childcare for 2–4-year-olds. The detailed breakdown is shown below.

**Table 2.3.2:  
Regarding the range of registered Childcare that is available to parents and carers in your area, how would you rate the following?**

	Poor	Satisfactory	Good	Excellent	Don't know
Quality of provision		3	13	13	3
Range of providers	4	9	11	6	2
Number of places	8	6	9	3	6
Affordability	1	5	12	7	7
Flexibility of provision and sessions	1	5	13	7	6
Suitability of opening times	1	4	13	9	5
Location and accessibility of Childcare	2	3	16	7	4
Welsh provision	2	5	14	9	2

**Figure 2.3.1: Provider rating of registered Childcare available to parents:**



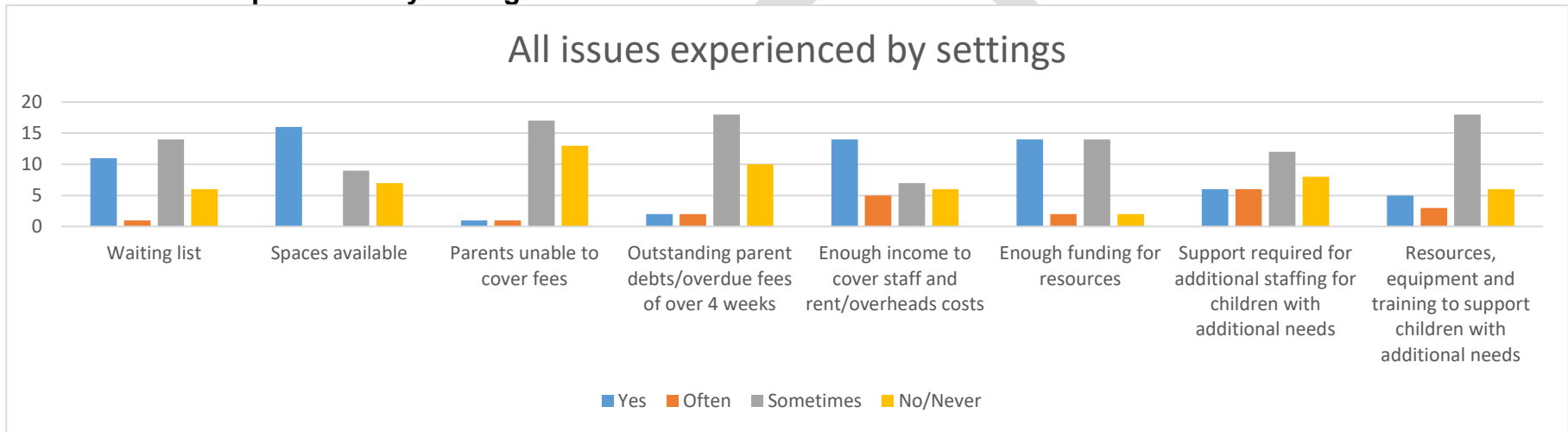
**Issues experienced by Childcare Providers:**

<b>Table 2.3.3: Does your setting currently have experience of the following issues?</b>				
	<b>Yes</b>	<b>Often</b>	<b>Someti mes</b>	<b>No/Nev er</b>
Waiting list	11	1	14	6
Spaces available	16		9	7
Parents unable to cover fees	1	1	17	13
Outstanding parent debts/overdue fees of over 4 weeks	2	2	18	10
Enough income to cover staff and rent/overheads costs	14	5	7	6



Enough funding for resources	14	2	14	2
Support required for additional staffing for children with additional needs	6	6	12	8
Resources, equipment and training to support children with additional needs	5	3	18	6

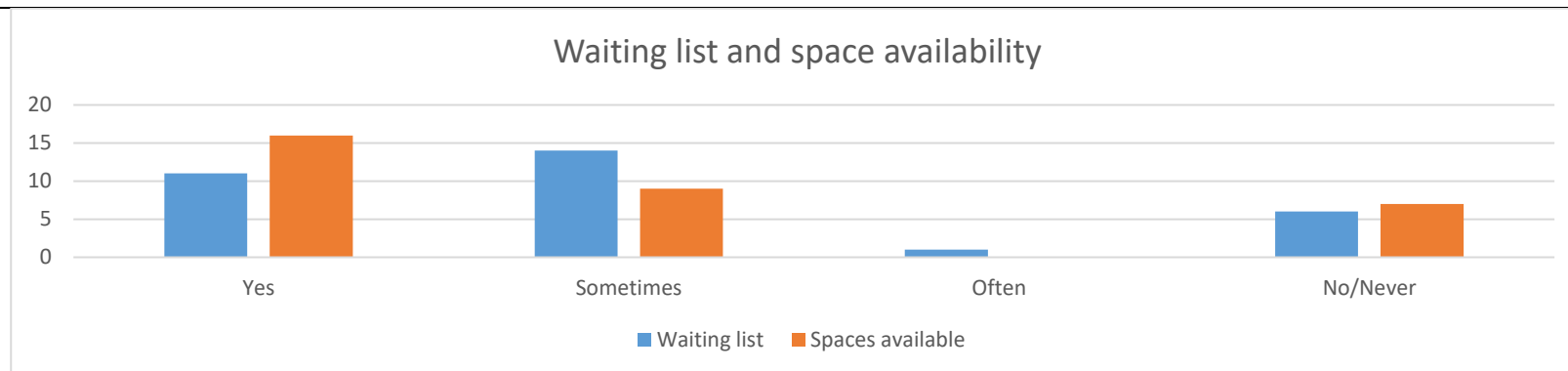
**Figure 2.3.2: All issues experienced by settings:**



Each of the issues listed above are explored further here:

<b>Table 2.3.4: Waiting list and space availability</b>	<b>Yes</b>	<b>Sometimes</b>	<b>Often</b>	<b>No/Never</b>
Waiting list	11	14	1	6
Spaces available	16	9		7

**Figure 2.3.3: Waiting list and space availability**



The 'Number of spaces available' as an issue here contradicts the previous question's response. The variables may need further exploration – as it may be spaces according to age of child or type of setting. The survey did not ask for details per age of child, and we have not analysed the results per type of setting for each question.

We are aware that there are unused spaces in some playgroups, and most after school club settings, but spaces for children under 2 or for full day care are in short supply and creating waiting lists for some providers.

**ACTION: Explore survey response on waiting lists and spaces available as the sample response in this survey was too small to draw conclusions. Establish a methodology to monitor waiting lists and space availability per Childcare type, linking with any proposed housing development information.**

**Investigate potential for some existing providers to increase capacity rather than create new provision.**

Childcare Providers were invited to add further comments and observations regarding any issues that they were experiencing. Some have been included here:

*I have trouble filling spaces – (Childminder)*

*I have a waiting list for children Under 5 up until 2023. With me having 2 [children] of my own in this age bracket this only allows me to care for one more child under 5 years old following the ratios. I have had no interest/enquiries for children aged over 5. There is a much greater need for Childcare spaces for younger children – (Childminder)*

*We are unable to find staff to work with children with special needs that attend our nursery even though adverts have been put out twice in the last two months, and current staff have to share the load between them. We have constant phone calls for*

*spaces at our nursery and are full to capacity and have a waiting list. Parents who cannot get spaces become very upset on the phone as they are stuck for Childcare – (Day Nursery)*

*We have spaces available in our after-school club since the pandemic and with parents working from home we currently have less children requiring care. It's then a fine balance to match staff numbers to child ratios and trying not to lose money on every session. It also appears to be costing the business more to provide 1 to 1 Childcare – (Out of School)*

**Is staff recruitment and retention an issue for your setting?** Responses included:

*A huge issue! We have an advert out for an assistant at the moment - this is the 6th time we are advertising! – (Cylch Meithrin / Playgroup )*

*Additional staff would be very attractive and advantage to allow us to carry out everything that is required of us at a high and constant standard, however, funding that extra resource would not be financially feasible.*

*Working with young children is very stressful and hard work and this is not reflected in the salary/hourly rate that is offered to those working in this field.*

*Demands and expectations of those working in a leadership role is not appreciated or understood as Meithrin settings have altered beyond recognition.*

*Many staff are leaving this profession to work elsewhere, securing a better hourly rate of pay without the stress levels – (Cylch Meithrin / Playgroup )*

*Yes. Over the last 2 years we have had 5 staff leave us to start jobs in totally different sectors which is a loss to the Childcare sector as they were very good members of staff. The Childcare sector is unable to offer wages much higher than minimum / living wage and also in the private sector there aren't the benefits of sickness pay or maternity pay.*

*It is a challenge to provide affordable Childcare and be a viable business at the same time.*

*At the moment the job doesn't seem appealing - work from home has become the norm! - (Day Nursery)*

**Are staff qualifications an issue?** Responses included:

*It can be a challenge to maintain 50% qualified staff ratios, this will probably increase as the Playwork qualification is introduced as well - (Out of School)*

*Short contracts and low hours not enticing good quality staff to the job as well as very low pay compared to other work in the area requiring less qualifications and responsibility – (Cylch Meithrin / Playgroup)*

*Yes. The number studying Childcare courses at college has decreased substantially. Secondary school in the area are no longer offering the course.*

*As a Welsh language nursery we also need fluent Welsh speakers. Therefore the availability of Welsh speaking qualified workers is even more of an issue – (Day Nursery)*

**Do you have any comments / suggestions for improvements regarding the Childcare market in your area?**

Providers told us about the sufficiency, quality, affordability, or barriers accessing all types of Childcare available.

*The numbers of Childminders in [my village] and surrounding area has reduced over the time I have been Childminding. I think this is due to lots of little changes over time which has had a big detrimental effect on the sector. Some of the changes are: the amount of paperwork has definitely increased over time. We are expected to run like a Nursery or Meithrins but with only one person responsible for everything which means paperwork takes over weekends and evenings. The unsocial, long hours. The average fee Childminders charge per child, we have to stay affordable for parents but we need to make money. Covid has reduced the amount of physical support, help and advice we receive. We do not have regular catch-ups like previously did and this can lead to isolation and less Childminders within the community – (Childminder)*

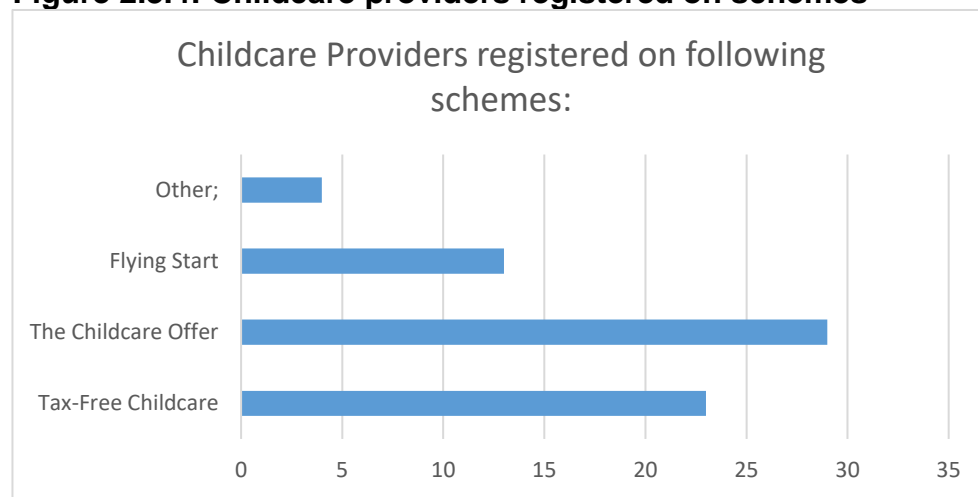
*Funding for 2-3 year olds not just for flying start children – (Cylch Meithrin / Playgroup)*

*The Childcare Offer has been very helpful. Lack of places is a problem in the area for children under 4 years old – (Day Nursery)*

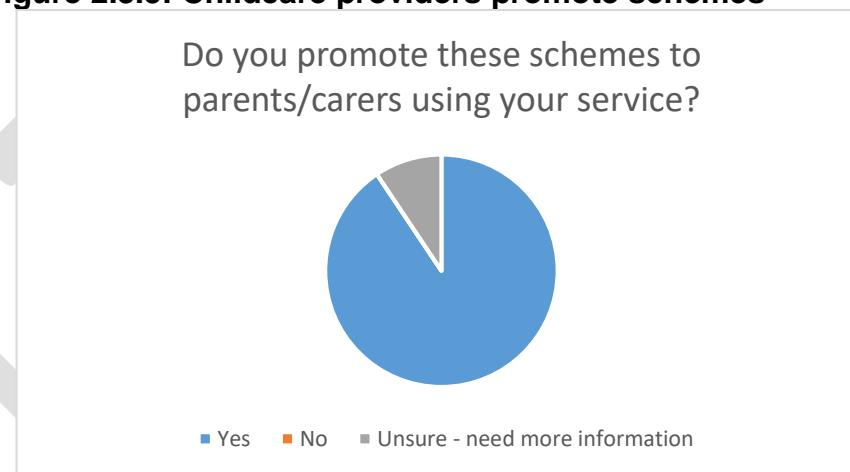
*Our location is half an hour from the nearest nursery and even more in some directions. For example one parent travels 40 minutes in the opposite direction to their work location to get Childcare with us as there is nothing else available closer. As distance from nursery is not a part of our admissions policy accepting children from further afield has meant that we have had to let down people that are very local to the nursery – (Day Nursery)*

**Childcare financial support schemes** – provides reported that they accept Flying Start, Childcare Offer, Tax-free Childcare and various voucher schemes or the early education funding.

**Figure 2.3.4: Childcare providers registered on schemes**



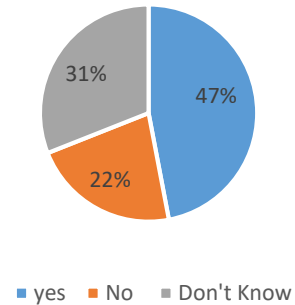
**Figure 2.3.5: Childcare providers promote schemes**



**Do you think that the Childcare Offer for Wales has helped unemployed families with 3 – 4 year olds to gain employment?**

**Figure 2.3.6: Childcare Offer for Wales has helped families to gain employment**

Do you think that the Childcare Offer for Wales has helped unemployed families with 3 – 4 year olds to gain employment? %



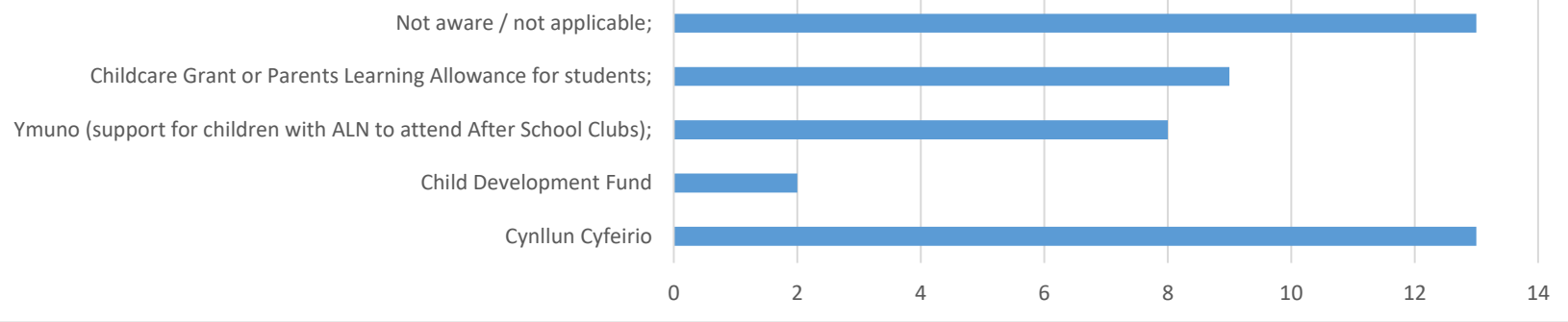
Are you aware of additional support schemes for the children in your care?

Table 2.3.5: Awareness of additional support schemes

Cynllun Cyfeirio	Child Development Fund	Ymuno (support for children with ALN to attend After School Clubs);	Childcare Grant or Parents Learning Allowance for students;	Not aware / not applicable;
13	2	8	9	13

Figure 2.3.7: Awareness of additional support schemes

### Awareness of additional support schemes



Providers were invited to share any concerns, or what changes they would like to see going forward since the COVID-19 pandemic started, which has changed service delivery in the last two years.

*The working pattern of people at work still varies but you will need this type of care – although it will be for small numbers – (Out of school)*

*Having the government tell employers that it is for the organisations to or RAs etc is not very helpful - we are a voluntary run organisation and the amount of paperwork has been huge - a huge amount on people – (Cylch Meithrin / Playgroup).*

*Financially, the covid-19 pandemic has had a significant impact – (Day Nursery)*

*Reiterate effect on staffing - people have changed careers wanting a different life. Childcare is a tiring profession and people have seen that there admin office jobs available which is less demanding physically – (Day Nursery)*

**Do you have any other concerns moving forward?** Responses included:

- I think Childcare providers are finding being paid so late by the Childcare offer a big problem.
- Current rate of pay for the 30 hours Childcare scheme need to be reviewed in line with the increase of minimum wage and living wage in April.

- that children of home workers could be missing out on group play activities and interactions and that the children whilst in a home environment may not be fully cared for as parents are focusing on working from home.

<b>Table 2.3.6: Do you feel you receive enough and relevant support from the following:</b>	<b>Yes</b>	<b>Sometimes</b>	<b>No</b>	<b>Not applicable</b>
Childcare Unit - Ceredigion County Council	29	2	0	1
Schools Service (for those providing Early Education) - Ceredigion County Council*	10	3	2	17
Care Inspectorate Wales	18	10	4	0
Estyn (for those providing Early Education)	8	4	0	20

\* Caution - some noted they provided Early Education but are not funded by LA Schools Service so therefore would not be eligible for support from the Schools Service.

#### **Do you feel you receive enough and relevant support from the following CWLWM umbrella organisations?**

The Childcare Unit provides funding for some of these to support providers locally, and they also have their national campaigns and funded projects that we share regularly with our settings.

<b>Table 2.3.7: Do you feel you receive enough and relevant support from the following CWLWM umbrella organisations?</b>					
	<b>Yes</b>	<b>Sometimes</b>	<b>No</b>	<b>Would like more support</b>	<b>Not applicable</b>
Mudiad Meithrin	12	8	2		10
Early Years Wales	6	9	2		15
Pacey Cymru	11	8	1	2	10
Clybiau Plant Cymru Kids Clubs Wales	7	11	4		10
National Day Nursery Association	2	4	3		23



Caution - some replied No/sometimes instead of not applicable e.g. childminders			
Caution - some replied yes instead of not applicable e.g. Cylch			

Responses demonstrate that providers are kept informed well by the CWLWM organisations.

**Further comments identified by providers included:**

- I would like to see the hourly rate paid to Childminders from the Childcare Offer to increase alongside the going rates for Childcare. When it started 5 years ago I charged £4 an hour for private families. Now I am thinking about having to charge £5 an hour due to the raise in the National Minimum wage, which means that I'm losing 50p per hour per child on the Offer!*
- Pay for registered and qualified practitioners in the Childcare sector is extremely poor resulting in staff increasingly feeling under-valued and searching for employment in different sectors in order to have a better quality of life*
- Recruiting Childcare sector staff with correct qualifications and language skills.  
Balancing the cost of Childcare for parents with the running costs of a nursery*
- CIW regulation make it very difficult to create new Childcare provision due to the lengthy process of registration*
- The National Minimum Standards and qualifications requirements are also very, very onerous, for what is often low paid and insecure employment*
- We have gone backwards since 2000 when I first had employment as a Childcare development officer and there is less provision for parents as time goes on which has a negative impact on particularly women's ability to take up employment and a knock on employment on the amount of children living in poverty*

**2.4 SCHOOLS SURVEY**

**METHODOLOGY**

The School's Survey was sent to all primary (40) and secondary (7) (including 3-16 and 3-19) schools via an online survey. A presentation was given to all Head teachers informing them of the CSA process. 11 responses were received from 9 primary and 2 secondary schools. (23% of all schools). 5 in Welsh; 6 in English. Schools from only 6 of the 9 MSOA responded to the survey.

**Table 2.4.1: Primary Schools per Middle Super Output Area** (including 3-16 and 3-19 schools):

<b>Borth &amp; Bont-goch</b>	<b>Aberystwyth North</b>	<b>Aberystwyth South</b>	<b>Aberaeron &amp; Llanrhystud</b>	<b>New Quay &amp; Penbryn</b>	<b>Lampeter &amp; Llanfihangel Ystrad</b>	<b>Cardigan &amp; Aberporth</b>	<b>Beulah, Troed-yr-aur &amp; Llandysul</b>	<b>Rheidol, Ystwyth &amp; Caron</b>
Craig yr Wylfa (Borth)	Comins Coch	Llwyn yr Eos (Penparcau)	Aberaeron	Cei Newydd	Bro Pedr (3-19 Lampeter)	Aberporth	Bro Teifi (3-19 Llandysul)	Henry Richard (3-16 Tregaron)
Penrhyncoch	St Padarns	Plascrug	Ciliau Parc (Ciliau Aeron)	Bro Sion Cwilt (Synod Inn)	Dihewyd	Aberteifi	Cenarth	Llanfarian
Rhydypennau		Ysgol Gymraeg Aberystwyth	Llangwryfon	Llanarth	Dyffryn Cledlyn (Drefach)	Llechryd		Llanfihangel y Creuddyn
Talybont			Llanon	T. Llew Jones (Brynhoffnant)	Felinfach	Penparc		Llanilar
			Myfenydd Llanrhystud	Talgarreg	Y Dderi (Llangybi)			Mynach (Devil's Bridge)
								Penllwyn (Capel Bangor)
								Pontrhydfendigaid
								Rhos Helyg (Llangeitho)
								Rhos y Wlad (Bronant)
								Syr John Rhys (Ponterwyd)

**Table 2.4.2: Secondary Schools per Middle Super Output Area (including 3-16 and 3-19 schools):**

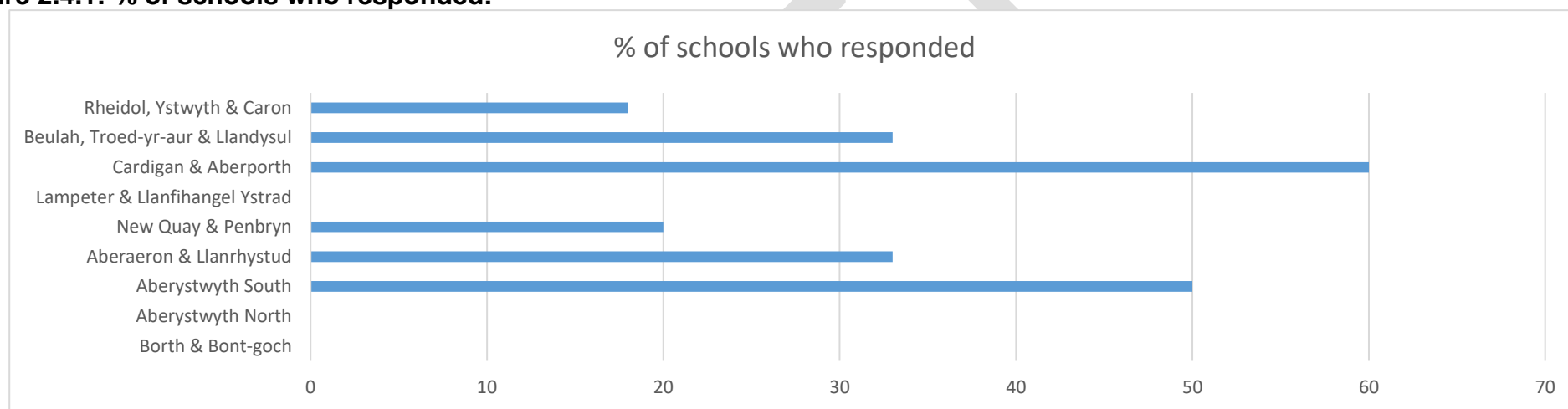
Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron
		Penweddig Comprehensive School	Aberaeron Comprehensive School		Ysgol Bro Pedr (3-19)	Cardigan Comprehensive School	Ysgol Bro Teifi (3-19)	Ysgol Henry Richard (3-16)
								Penglais Comprehensive School

**Table 2.4.3: School response per MSOA**

	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
Schools responded	0	0	2	2	1	0	3	1	2	11
Number of primary schools	4	2	3	5	5	5	4	2	10	40

Number of Secondary schools	0	0	1	1	0	1	1	1	1	2	7
% response rate	0	0	50	33	20	0	60	33	18	18	Overall 123%

**Figure 2.4.1: % of schools who responded:**



## RESULTS

The results have been collated below, but due to the low number of responses, have not been reported by MSOA.

**Table 2.4.4: Type of care in school – Registered or Unregistered:**

<i>Do you currently have any of the following types of Childcare which are</i>	<b>Registered with Care Inspectorate Wales (CIW) operating from your School site?</b>	<b>Not registered with Care Inspectorate Wales (CIW) operating from your School site?</b>
<i>After School Childcare</i>	2	

<i>Wrap Around Childcare</i>		
<i>Playgroup/Cylch Meithrin</i>	1	
<i>Holiday Childcare</i>		
<i>Breakfast Club - (Free)</i>	0	6
<i>Breakfast Club (Paid for by service users)</i>	0	3
<i>Breakfast Club - No Food Care only</i>	0	2

The knowledge that respondents had regarding Childcare providers and sufficiency of provision in the area was mostly answered as 'unsure'. Less than 45% reported that parents had approached the school regarding Childcare issues. It was clear that there was demand in Cardigan and Aberystwyth for After School Care, from staff and lone parents, and this may be a result of recent closures of out of school provision in both areas.

*“The after school club that was based in Cardigan has finished and some parents have asked about this - even though it is not part of the school.”*

*“Some parents in the past have asked about after school provision but due to costs/ lack of staff this was not an option a small rural school such as ours could consider providing”*

Breakfast Clubs were provided by all respondents; and 2 schools reported that they had rental agreements in place for the Childcare provision located on site.

63% organised activity clubs after school, mostly Urdd between 1 and 4 nights a week, under two hours, but many had not re-started since the pandemic.

There were mixed responses on whether families would take up Childcare if offered by the schools. Most thought there would be an interest but expressed concern regarding affordability. Parents have arrangements with extended family, so take up may not be high for a fee-paying provision.

*“I think it may be likely with a minority of families. However, we are in an area where there are low wages which are seasonal. I am not sure how many parents will take up a fee paying after school club. Professional parents would appreciate the support to be provided in school.”*

80% reported that the COVID-19 pandemic had affected the ability for Childcare to operate on their School site, with 60% unsure of whether the impact of the pandemic would affect the future use of Childcare on the School site.

60% were aware of the Childcare Offer, with 40% stating that it had benefitted working parents registered with their provision / School.

**Table 2.4.5: Childcare providers that collect from school:**

<b>Are you aware of local Childcare providers that collect children from your School?</b>	
a) Childminder(s)	5
b) Day Nursery	
c) After School Club	
d) Cylch Meithrin/Playgroup	1
e) Not Sure	4
f) Other	

**Table 2.4.6: Sufficiency of childcare:**

<b>In your opinion, is there sufficient Childcare available locally to cater for the Childcare needs of the families with children that attend your School?</b>	
Yes	1
No	4
Don't Know	6

**Table 2.4.7: Parent Childcare issues:**

<b>Have parents approached you regarding Childcare issues?</b>	
Yes	5
No	6

**Table 2.4.8: Staff Childcare issues:**

<b>In your opinion, is there sufficient Childcare available locally to cater for the Childcare needs of the staff (including yourself) that work at your School?</b>	
Yes	3
No	3
Don't Know	5

<b>Have staff members approached you regarding Childcare issues?</b>	
Yes	3
No	8

**Table 2.4.9: Offering Childcare provision on school site:**

	<b>Do you have any available space within your School in which a new Childcare provision could be developed?</b>	<b>If yes, would you be willing for the Childcare Unit to contact you to discuss further?</b>	<b>Do you believe offering Childcare on your School site will be of benefit to your School?</b>
Yes	2	2	7
No	6		1
Don't Know / unsure	3		1
Not applicable			1

**Table 2.4.10: School activity clubs:**

<b>If you arrange activity clubs after school hours at your School how many nights a week do they run for?</b>	<b>1 night</b>	<b>2 nights</b>	<b>3 nights</b>	<b>4 nights</b>	<b>5 nights</b>	<b>n/a</b>
	4		1	2		3

*Pre Covid - we offered: running club, cooking club, coding club, Urdd, football/rugby; art club etc. Unfortunately due to Covid cases we have not restarted these as of yet. Hoping to in the Spring.*

**With regards to affordability of Childcare, what is the likelihood of families taking up Childcare if it was offered? (When thinking about your answer, please give regard to the economic makeup of your school population, the likely use of families and friends as a Childcare option etc)**

*I think it may be likely with a minority of families. However, we are in an area where there are low wages which are seasonal. I am not sure how many parents will take up a fee paying after school club. Professional parents would appreciate the support to be provided in school.*

*All depends on cost.*

**Table 2.4.11: Impact of Covid on Childcare provision on school site:**

	<b>Has the COVID-19 pandemic affected the ability for Childcare to operate on your School site?</b>	<b>Do you think that the impact of the COVID-19 pandemic will affect the future use of Childcare on your School site?</b>
Yes	8	
No		1
Unsure		6
Not applicable	2	3

**If yes, please comment:**

*We do not have enough staff to run after school clubs as we have 3 bubbles - before we started, I was able to run one club for the whole school.*

*Due to Covid restrictions we have been unable to offer our usual after school clubs run by our teaching staff from 3.30-4.30 4 days a week.*

**Table 2.4.12: Awareness of Childcare Offer:**

	<b>Are you aware of the Childcare Offer for Wales?</b>	<b>Do you think the Childcare Offer for Wales has benefitted working parents that are registered with your provision / School?</b>
Yes	6	4
No	3	
Unsure	1	2
Not applicable		4

**3 PARTNERSHIP WORKING**



### 3.1 FAMILY INFORMATION SERVICE (FIS):

The Local Authority have a statutory duty under Section 27 of the Childcare Act 2006 to provide a Family Information Service (FIS) for families and prospective parents. Local Authorities are strongly encouraged to resource an integrated information service as a hub of this provision. The service must provide information which is of a prescribed description which can fall into two categories:

- Childcare
- Other service or facilities which may be of benefit to parents, prospective parents, children or young people

The FIS offers free impartial advice and information on Childcare and work-life balance for parents and carers; Information on Help with Childcare Costs including the Childcare Offer for Wales and can provide information to employers on Childcare and work-life balance issues as outlined in the Childcare Statutory Guidance.

**Staffing Structure:** In April 2018 under Local Authority transformation the FIS duties transferred from the management of the Childcare Unit over to Porth Cymorth Cynnar/Porth y Gymuned (Early Intervention Services). This resulted in the FIS Officer and associated funding being transferred to a different department. Whilst the Childcare Unit transferred from the Policy Support Team to School Services.

**Delivery:** Porth y Gymuned was established to provide a through-age service, with 4 Community Connectors appointed (including the FIS officer) to deliver their services, which included the Family Information Service. This service was through-age and the funded officer was therefore did not have capacity to dedicate their time to the management of the Family Information Service regarding Childcare and family support. The change in service resulted in the end of the dedicated FIS website and the weekly newsletters produced by the FIS. Some information was transferred to the Council's Corporate website. Ceredigion signed up to use the All-Wales resource directory Dewis Cymru. This meant the end to the internal Childcare search facility, and it was replaced with the Dewis Cymru directory for Childcare providers.

**Joint working:** Although the FIS responsibility sits in Porth Cymorth Cynnar/ Porth y Gymuned the Childcare Unit has been carrying out the following duties to ensure compliance with the Statutory Guidance by:

- ensuring new Childcare providers are aware of what the FIS is.
- encouraging them to sign up their service to Dewis Cymru national online search engine.
- encouraging providers to make use of Dewis and update their details, as this will be a tool for families to find local registered Childcare.
- responding to enquiries from families.
- updating Dewis Cymru Training module for Ceredigion Childcare providers

**ACTION: The Childcare Unit needs additional funding as we are undertaking duties (outside our remit) to ensure that the statutory duties are being met.**

During 2021, the service area was again affected by a restructure under the Transformation Agenda, with the outcome yet to be determined at time of writing but the service may be managed by Corporate Clic services (TBC). There is an awareness that FIS is a statutory requirement in the new Through Age and Wellbeing (TAW) model, and officers continue to work with local providers.

**Concerns:** Although FIS transferred to Porth y Gymuned it was with the expectation that each Community Connector would take on an element of FIS within their role. In reality, due to the volume of caseloads allocated to each Community Connector it has not been possible to take on FIS responsibilities. This has led to delays in updating Dewis information, management of data and information for reporting. FIS must rely on the Council's Corporate social media pages which means it is limited in the number of posts they can share and the frequency. Flying Start have access to Teuluoedd Ceredigion Families social media pages and have more flexibility with posts.

**ACTION: Local Authority to ensure Statutory duties are being met for the Family Information Service.**

### **Family Information Service (Ceredigion FIS) (feedback from Employer Survey)**

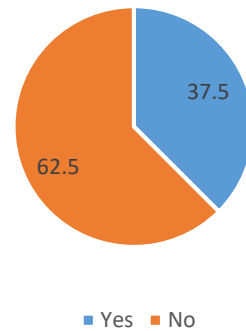
Nearly two-thirds of Employer Survey respondents were not aware of FIS, and a quarter of respondents requested more information which has been shared with the Family Information Service officers.

*"I have repeatedly asked for support and advice in the past from various organisation involved with Childcare provision in Ceredigion and I've been told that what we've got is it and although they appreciate the lack of provision there's nothing, they can do about it so it seems pointless wasting time having more conversations"*

**Figure 3.1.1: Graph from Employer survey results demonstrating awareness of FIS:**

### Do you know about the Family Information Service

%



The majority of the providers who responded to the Provider Survey updated their details regularly on DEWIS Cymru.

**Table 3.1.1: Childcare Provider use of DEWIS Cymru and Family Information Service:**

Provider Survey	Do you regularly update your details on DEWIS Cymru? This information feeds the Family Information Service database to help families find Childcare.	Do you use the Family Information Service to access information about Childcare options for your service users?
Yes	97%	69%
No	3%	31%

**Figure 3.1.2: Childcare Provider use of DEWIS Cymru**

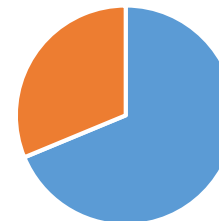
Do you regularly update your details on DEWIS Cymru? This information feeds the Family Information Service database to help families find Childcare.



■ Yes ■ No

**Figure 3.1.3: Childcare Provider use Family Information Service:**

Do you use the Family Information Service to access information about Childcare options for your service users?



■ Yes ■ No

### **SOCIAL CARE SERVICES**

The Social Care Service will use the Childcare Unit to raise any queries regarding finding Childcare for Looked After Children and during the pandemic worked closely together. Social Care did not highlight any issues from the stakeholder survey, but feedback from providers identified weaknesses in communication and involvement in working with Social Care.

**3.2 ACTION: Need to improve dialogue and partnership working between Childcare Unit and Social Care teams. Need closer working with Social Care teams to ensure recognition of the professional status of all Childcare providers and their role within children's lives.**

Childminders may feel the burden of the extra workload more acutely as they are lone workers working from their own homes, who often provide their services over extended hours and have their own family commitments. This means that all of their administration work is carried out outside of the hours they offer Childcare provision. Therefore, they would particularly benefit from extended support and recognition from other professionals of the importance they play in the lives of children.

### **3.3 SAFEGUARDING CHILDREN BOARD**

	<p>Ceredigion Local Operational Group (LOG) which sits under the Mid and West Wales Regional Safeguarding Board (CYSUR) replied to the consultation wanting to emphasise that ensuring the adequacy of placements and care capable of supporting vulnerable children is of paramount importance in safeguarding children. The LOG often include Childcare as part of a safeguarding or care and support plan.</p> <p>The safeguarding referral is also very important, and the process for this is covered in the Level 2 Safeguarding Children course delivered by Ceredigion County Council.</p> <p>All Ceredigion Childcare providers can attend this course (currently online) as well as complete the e-learning Level 1 Safeguarding Children and Adults at risk programme. Training dates and enrolment details are shared on a termly basis with the sector by the Childcare Unit.</p>
<p><b>3.4</b></p>	<p><b>EARLY YEARS INTEGRATION FRAMEWORK</b></p> <p>The Early Years Integration Framework is a collaboration between Ceredigion County Council, Carmarthenshire County Council and the Hywel Dda University Health Board to better integrate services for children aged zero to seven years and their families. The goal was to create a seamless system of services that provide responsive and effective advice, support and assistance for families across Ceredigion using the full range of services available to them – statutory and non-statutory.</p> <p>Changes were made by Ceredigion County Council to achieve better integration that included employing a Coordinator to set up Operational and Steering Groups with representation from all agencies working with children aged zero to seven years and their families across Ceredigion – from Health, Local Authority and Third Sector including Childcare providers, and implementing the model in Pathfinder areas.</p> <p>An Implementation Plan, Early Years Information Sharing Protocol, Database and Registration forms as well as information booklets for families were developed and shared which were positively received by professionals and families alike. However, some weaknesses of the service were identified e.g. in employment support. The pandemic had a significant impact on service provision in Ceredigion by reducing contact between families and professionals., Adaptations were made to deliver services online where possible, which positively benefitted families in remote areas, and negated some barriers such as transport and Childcare enabling more people to attend online courses and sessions.</p> <p><i>Source: Evaluation of Integrated Early Years Provision in Ceredigion – Final Report May 2021</i></p>
<p><b>3.5</b></p>	<p><b>JOB CENTRE</b></p>

Jobcentre Plus is part of the Department for Work and Pensions. They manage the PaCE (Parents, Childcare and Employment) funded by the European Social Fund project which has been granted an extension until March 2023. The project provides Childcare support for parents whilst training or looking for work. [Parents Childcare and Employment \(PaCE\) project | GOV.WALES](#)

**PaCE** officers are members of the Early Years, Childcare and Play Strategy Group and provide quarterly updates on the numbers of parents training and returning to employment. In 2020-2021 the project supported 20 families into full-time work and 5 families into part-time work throughout Ceredigion. Clients who were supported to enter the Childcare workforce were funded to complete Level 3 Playwork course and a childminding course.

However, during the pandemic, face to face courses were cancelled, and this impacted on Childcare providers that were funded to provide the Childcare whilst their parents were studying or training. As the spaces were not used, and the funding rules did not allow payment for the space unless the child was attending, some settings saw a significant fall in their projected income and were unable to be recompensed.

### **WORKWAYS+**

Ceredigion Workways+ offers training, qualifications, volunteering placements, paid work experience opportunities and a personal mentoring service to help people get their lives back on track. Support is able to help people affected by work-limiting health conditions or disabilities; Carers; those with low or no qualifications; people with Childcare responsibilities; the over 54's; people in a single adult or jobless household or anyone from a Black Minority Ethnic group. Workways+ offer one-to-one mentoring support with job seeking, writing the perfect job application and CV, interview skills and confidence building. It can pay for qualifications and training, and for some participants, a paid temporary job with a local employer. [www.workways.wales](http://www.workways.wales)

3.6

The Employment and Training Service within Ceredigion County Council manage the Workways+ project as well as the Communities for Work programme which is funded by the Children and Communities Grant (CCG), and there is ongoing dialogue with the service with regards to Childcare qualifications and recruitment. Work needs to be done to develop this further.

**ACTION: Set up a Childcare Employment and Learning Task group to include Employment and Training Services, School Services, Further Education College to offer appropriate courses and recruit learners.**

**Work with Communities for Work+ and employability programmes to align the employment opportunities and training and advice**  
**Ensure input provided to the Post-16 education review to highlight issues around qualifications.**

## ECONOMY & REGENERATION; HOUSING AND PLANNING, TRAFFIC & TRANSPORT

### ECONOMY & REGENERATION SERVICE

Childcare has a multi-generational role within the lives of families and young children. Childcare is part of the foundational economy providing employment within the private and third/voluntary sector, although poorly paid, as well as providing an essential service for families to be able to continue to work or attend education or training, but it also enables children to be in a setting that promotes their healthy development and school readiness (while their parents work).

The recovery stage of the pandemic will again highlight the importance of the Childcare sector as they adapt their services to support children whose development has been affected due to lack of socialising opportunities, lack of in person education provision etc.

Childcare not only has a direct impact on the economy today, but also impacts the economy of tomorrow.

*“Care (which includes Childcare) and health services, food, housing, energy, construction, tourism and retailers on the high street are all examples of the foundational economy. The industries and firms that are there because people are there. Estimates suggest they account for four in ten jobs and £1 in every three that we spend.”* <https://businesswales.gov.wales/foundational-economy>

3.7

The impact of Childcare is broad-based:

- There is the direct impact of economic activity or revenue generated by those in the Childcare industry (centres and home-based providers),
- There is the indirect impact or spill over impact that results within communities from the operation of these businesses,
- There is the employment impact of jobs within the industry and spill over jobs because of the industry,
- There is the employer impact as parents who have access to reliable Childcare may consistently show up for work and be more productive while at work, and
- There is the impact on children who have access to quality Childcare that supports their healthy development.

Childcare is not highly recognised as a service that supports the local economy. However, it does provide employment in small villages and towns, and supports working parents to access employment, training or education.

The economic impact of Childcare matters because it helps drive local economies. When parents can access Childcare, they are more likely to enter the workforce and stay employed. Much of the Childcare workforce are female according to the Childcare Unit training booking and Childcare provider lists.

**Table 3.7.1: Male/Female Workforce:**

Population Mid-year 2020 Source: StatsWales	Male	Female
72,895	36,262	36,633
	49.7%	50.3%
Workforce	53.1%	46.9%

The Childcare sector is labour intensive and so investment in this sector has a positive impact on employment. In turn those who are employed spend their incomes which has a multiplier effect, creating demand for output in other sectors and stimulating further job creation. Childcare is high on Welsh Government's agenda particularly in the current climate as we look to rejuvenate the economy as we recover from COVID-19-19.

The provision of high-quality, affordable and accessible Childcare lies at the heart of Welsh Government's child poverty strategy. And yet, Childcare as a profession is undervalued. The most valuable occupations to society are among the lowest paid, while those which may be damaging to society, the environment and the economy, may be among the highest paid. In economic terms the pay of Childcare workers is just as much of an investment as the pay of construction workers, in that one creates physical capital, the other creates human capital.

The Childcare sector is characterised by low pay, high staff turnover, recruitment challenges of qualified staff, and insecure funding creates challenges for the sustainability of these services in the future. Sustainability grants are awarded annually through Welsh Government funding who acknowledge the fragility of the sector, and the availability of grants is instrumental in ensuring that the costs of Childcare are not passed on to families.

*“Strongly agree with the need to attract young people to stay in the area. The skills need to be rewarded with better pay rates in some sectors e.g. social care and Childcare.”*

The newly signed Growing Mid Wales deal by Welsh Government, Ceredigion County Council and Powys County Council (December 2021) aims to create new jobs and support investment in the mid Wales economy. Childcare plays an important role as part of the foundation for the economic wellbeing and post pandemic recovery of the area and we would like to raise awareness of the need to consider Childcare wherever there are any large developments.

If Ceredigion are to reach its goals of achieving its priorities identified under priority 2 (*Economic Strategy*), it needs to ensure that Ceredigion also has the infrastructure to offer Childcare to support families. Every new school should ensure wrap around Childcare is included within its provision to address this.



Childcare providers are businesses and as such need to be able to access the same business support as all other small and medium businesses in Ceredigion.

The SASS data collated by CIW in July 2021 recorded a total of 345 individuals who were employed/self-employed as a Childcare practitioner across 91 registered Childcare settings. These settings are all inspected by the regulatory body Care Inspectorate Wales (CIW).

**Table 3.7.2: Legal Entity of Childcare Provider**

<b>Legal Entity of Childcare Provider</b>	<b>TOTAL</b>
Charitable Company	3
Charitable Incorporated Organisation	7
Charitable Trust	2
Individual Provider	11
Joint Registered Persons	7
Limited Company	11
Other Corporate Body	1
Other Unincorporated Body	4
Sole Trader	45
<b>TOTAL</b>	<b>91</b>

Private businesses include 6 Full Day Care Nurseries and 45 Childminders who are self-employed and work from their own homes. Other settings include third sector/ social enterprises consisting of 29 Sessional Care (playgroups/Cylchoedd Meithrin) and 11 settings who provide Out of School, Holiday or Crèche provision.

The Coronavirus pandemic highlighted the important role of key workers and the role of those providing the services upon which they rely, such as Childcare. The Childcare sector needs to be acknowledged for the role they play in the current economy and will play in the future economic growth of Ceredigion.

The '*Economic Strategy - Priority 3: Enterprise*' identifies that there are opportunities in care. Although 'Care' is referenced in the strategy, Childcare is not included within this heading by Welsh Government and other bodies. Childcare has its own status, regulations, training/career pathway and criteria which needs to be reflected in the strategy.

The Economy and Regeneration Service also highlighted that existing employment sites are located in Aberystwyth, Cardigan, Horeb, Llandysul and Felinfach. Future development activities are identified as being around the Aberystwyth University site in Penrhyncoch

**ACTION: Ensure that Growing Mid Wales development projects include Childcare and Play provision in their impact assessments and developments.**

**ACTION: Ensure that any School Development projects include wrap around Childcare (Afterschool Club, Holiday Club and Cylch Meithrin/Playgroup) provision early in the planning phase and liaise with the Childcare Unit (or equivalent) to ensure suitability of such provision.**

**ACTION: Work with Welsh Government to investigate increased status and pay opportunities for the Childcare Workforce. Care Inspectorate Wales inspect quality of care for children, but consideration needs to be given to quality of working pay and conditions for the Childcare workforce.**

## **HOUSING AND PLANNING SERVICE**

### **Planning Policy**

The housing developments for 2016-2021 showed that **693** houses were completed in this 5-year period. On further scrutiny, a pattern emerged regarding capacity issues at local Childcare settings in relation to the housing development in those areas.

The housing developments projected for 2021-2026 totals **1810** units – over 60% increase on the previous five-year development. However, housing completion rates are likely to be only slightly higher than the previous 5 years. This number includes Discount for Sale (DFS) housing - a type of Low-Cost Home Ownership (LCHO) affordable housing tenure (Planning Policy S05 requires 20% affordable housing) which may include DFS, which are reduced by 30% from the open market value and the purchaser must qualify under certain criteria. The projected units also include Social Housing that are to be developed by Registered Social Housing Landlords (RSL).

**ACTION: The demand which housing developments place on Childcare settings needs to be monitored.**

### **Housing: Affordable and Specialist Housing services**

Under the Social Housing Grant (SHG) Development Programme, Registered Social Landlords (RSL): completed 83 homes in 2020-2021 (General Needs) in 3 locations.

Planned delivery for 2021-2023 are for 167 homes (97 for General Needs) across 6 locations.

One of the locations where there has been significant development to date does not have any registered Day Nurseries, and another does not have any pre-school / Playgroup provision available. This is of concern to the education and early years specialists, as developmental issues are not identified until the children start school at 3 years old, resulting in a missed opportunity for early intervention.

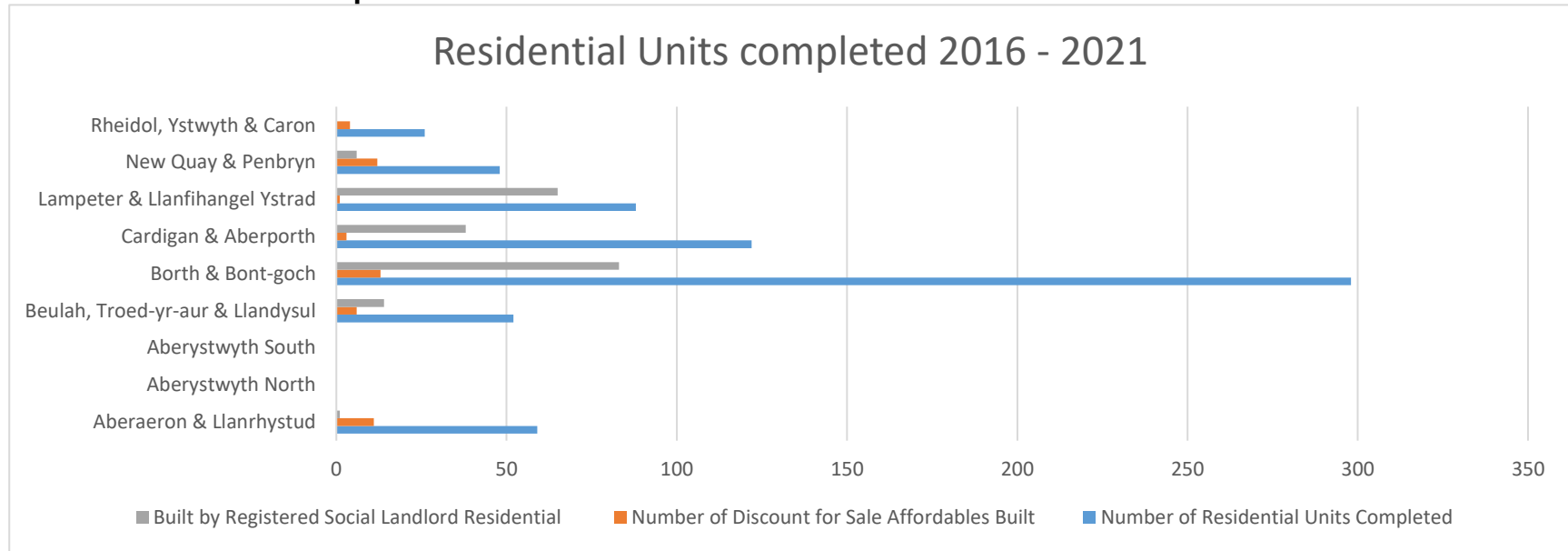
**ACTION: Further research is required to look at historical and future impact on settings where there has been / will be significant housing development. No additional Childcare spaces have been created in existing or new Day Nurseries; or an increase in registered Childminders in recent years, but they have recorded waiting lists for children under 2 years old. There is also anecdotal evidence of an increase in children requiring additional support in some settings, and any correlation will need to be investigated to ensure adequate funding and support is made available.**

The Housing Service has also drafted an Affordable Housing Strategic Delivery Document identified as the “Prospectus” which supports the SHG Planned Development Programme (PDP). This is a high-level outline of the broad strategic aims and ambitions of the Authority in relation to Affordable Housing delivery and includes Low-Cost Home Ownership (LCHO) affordable homes based on a 3-year rolling programme.

**ACTION: Ensure consideration of Childcare provision is included in The Prospectus (Affordable Housing Strategic Delivery Document).**

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**Figure 3.7.1: Residential Units completed 2016 - 2021**



**Figure 3.7.2: Residential units 2021-2026 projected**



## **TRAFFIC & TRANSPORT SERVICE:**

The Transport Strategy & Safety Team & Corporate Passenger Transport Unit, under Highways and Environmental Services reported that the County Council continues to develop and provide more and better active travel routes where resources will allow – particularly within the three Welsh-Government designated Active Travel Centres of Aberystwyth, Cardigan and Lampeter. A review of the Active Travel Network Maps concluded in November 2021 involving extensive public and stakeholder consultation (including schools). The Council is also preparing for the introduction of the Welsh Government's All-Wales default 20 mph speed limit on existing restricted/ street-lit roads that will come into force from May 2023. The changes will help to create a safer road environment outside existing primary and secondary school sites in the County. The current Local Transport Plan is to be replaced with a new Plan developed with Powys County Council as a function of the proposed new Mid Wales Corporate Joint Committee. The Council currently awaits further information and guidance from the Welsh Government.

Aside from the various residential and some commercial developments across the County that the Local Planning Authority considers and approves or refuses in accordance with the various local development plan policies and the input of statutory consultees (such as the Local Highway Authority), perhaps the most relevant new development that is in the pipeline is the new area school which continues to have input from Highways and Environmental Services colleagues.

Ysgol Bro Teifi 3-19 school was built on the outskirts of Llandysul town which made it difficult for families with no access to transport to get to the pre-school provision funded by Flying Start. In order to help these families, Flying Start purchased a mini bus, and enables families to travel to and from the setting.

Child transport for pre-school children is not provided as they are not of the statutory transport eligible age of 5-18 years. The school transport policy is to provide home-to-school transport only, which is for the normal school hours - 9.00am to 3.30pm and no child will be eligible for transport from any After School Club.

With the increase in area schools, children are provided with school transport if their local village school has been closed and included in the area school. Transport is not provided if children need to stay in the After School Clubs, and parent/carers must arrange collection.

The rurality of Ceredigion means that generally families have to travel by car in order to access Childcare. Which can be an issue for some families if they have no access to a car and no public transport is available. Consideration needs to be taken into the impact this has on working families who are experiencing in-work poverty, and the rising costs of fuel and transport, with limited public transport.

**Parent response:**

*“Lack of transport makes it difficult to take my children to certain childminders/Meithrins/Childcare” (Rheidol, Ystwyth & Caron)*

One Day Nursery reported: *“Our location is half an hour from the nearest nursery and even more in some directions. For example one parent travels 40 minutes in the opposite direction to their work location to get Childcare with us as there is nothing else available closer. As distance from nursery is not a part of our admissions policy accepting children from further afield has meant that we have had to let down people that are very local to the nursery.”*

One parent who completed the Family Support Services survey commented:

*“There are no daycare/nurseries in cardigan, we have to travel to Newcastle Emlyn just to take our son to nursery so we can work!”*

Another response from the Parent/Carer survey stated: *“We have to drive to Newcastle Emlyn twice a day to access a nursery, which takes around 2 hours total each day. It is ridiculous that Cardigan can't provide Childcare other than childminders, which have no vacancies anyway. Meithrin is only for children aged 2+ and only for a few hours per day. For 2 full time working parents who have no family help, it is very difficult and expensive! The government is doing nothing to help mothers get back to work.”*

**Table 3.7.3: Average car return time to access key services by Community Area 2019:**

<b>MSOA Name</b>	<b>Average car return time to access key services by Community Area 2019 (Minutes)</b>
Rheidol, Ystwyth & Caron	18
New Quay & Penbryn	15
Borth & Bont-goch	13
Aberaeron & Llanrhystud	13
Lampeter & Llanfihangel Ystrad	12
Beulah, Troed-yr-aur & Llandysul	12
Cardigan & Aberporth	9
Aberystwyth South	6
Aberystwyth North	4

*Source: ONS Mid-Year Population Estimates, 2020.*

**Table 3.7.4: Average public transport return time to access key services by Community Area – 2019:**

<b>MSOA Name</b>	<b>Average public transport return time to access key services by Community Area – 2019</b>
Beulah, Troed-yr-aur & Llandysul	119
New Quay & Penbryn	107
Rheidol, Ystwyth & Caron	105
Lampeter & Llanfihangel Ystrad	93
Aberaeron & Llanrhystud	90
Borth & Bont-goch	63
Cardigan & Aberporth	55
Aberystwyth South	37
Aberystwyth North	26

*Source: ONS Mid-Year Population Estimates, 2020.*

**4 PLAY & PLAY SUFFICIENCY ASSESSMENT (PSA)**

The Ceredigion County Council Play Sufficiency Assessment was being prepared concurrently with this CSA, and the Childcare Unit contributed to the feedback and actions within the PSA. A Children’s Survey was also jointly developed with the Play Service, who commissioned a play practitioner to conduct the survey during the 2022 February half term holiday.

Information gathered in this CSA will also help inform and support the grant awarding process of the Play grant allocation e.g. identification of housing developments and play provision in those areas will be scrutinised. Ceredigion has a high number of holiday activity clubs that are exempt from CIW registration under the current guidance as they only provide 1 or 2 activities. These are mainly sports clubs. However, the provision of these undermine the registered holiday provision as the costs are generally lower per day. Parents will use these clubs to provide holiday care rather than the registered provision. This has been one of the reasons in the decline in registered holiday provision in Ceredigion.

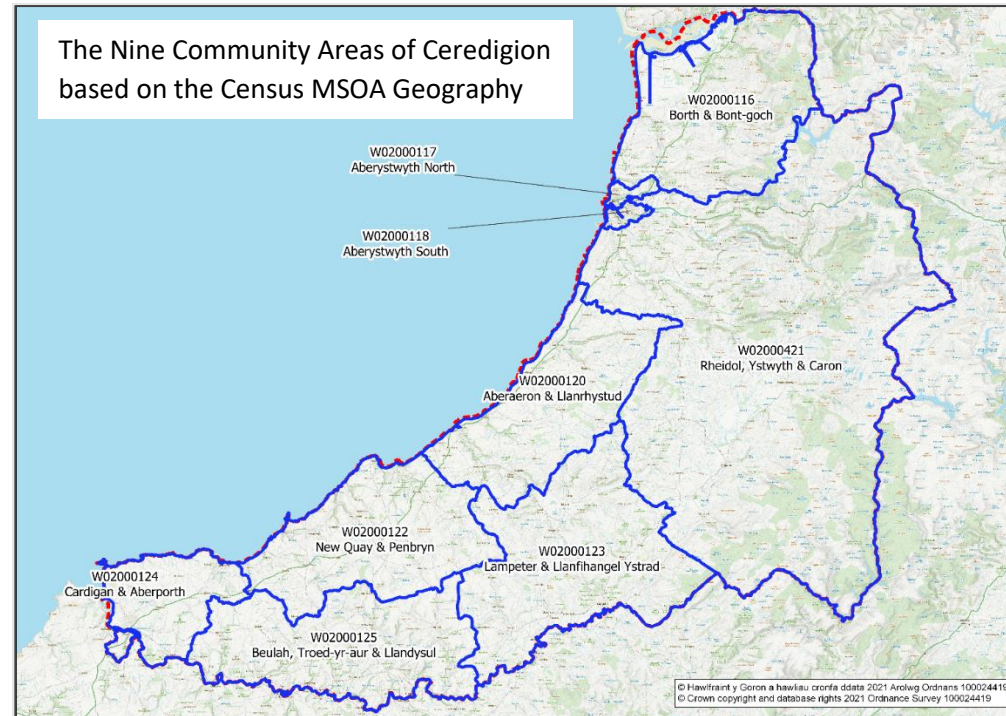
**ACTION: WG NMS Review needs to consider the impact unregistered provision is having on registered day care provision.**

	<p>Parents are unable to claim financial help towards the unregistered provision. WG/CIW need to consider a lighter touch registration process for this type of provision which would allow parents to access financial help.</p> <p><b>ACTION:</b> Investigate possibility of piloting a registered holiday activity club within a leisure centre in area of demand, therefore allowing parents to apply for financial support for holiday provision and ensuring provision meets a level of expectation within service.</p>
5	<p><b>THE CHILDCARE SUFFICIENCY ASSESSMENT AND THE LOCAL WELL-BEING NEEDS ASSESSMENT</b></p>
	<p>The well-being of individuals and communities can be affected by several economic, social, environmental and cultural factors. Every Public Services Board (PSB) in Wales is required to produce an Assessment of Local Well-being once every five years. The Ceredigion PSB completed the draft of its latest Assessment in November 2021, following extensive data analysis and engagement during the summer of 2021. Ceredigion's Assessment is based on the nine Middle Super Output Areas (MSOAs), and these are the community areas used to identify specific assets and challenges relating to well-being.</p>

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**Figure 5.1: Map of Ceredigion's Community Areas or Middle Super Output Areas (MSOA's)**



During the summer of 2021, a large consultation was undertaken in support of the Assessment of Local Well-being across Ceredigion to seek resident's views on well-being. This was conducted through a Regional Well-being Survey and followed up by a series of engagement events and workshops with various local groups. The results of these events have been used by the Ceredigion PSB to produce the draft Assessment of Local Well-being, allowing insight into the factors that matter to local people, along with the assets and the challenges that we face now and in the future. The Assessment will be used to develop the Local Well-being Plan for Ceredigion, setting out the actions and priorities to improve the well-being of Ceredigion's communities. The Childcare Sufficiency Assessment will link directly to the PSB's Assessment of Local Well-being.

The Assessment of Local Well-being was carried out concurrently with the Childcare Sufficiency Assessment, which presented challenges with drawing upon the information captured as stated in the Guidance. Welsh Government may need to consider staggering the deadlines in order to have more meaningful data analysis and conclusion.

Consultation on the Draft Assessment of Local Well-being was open in January 2022, and this Childcare Sufficiency Assessment will reflect any changes before final publication (this is a draft report).

The Ceredigion Assessment of Local Well-being has been produced by putting people at its centre by being engagement led, and by using the 'life stages' model to assess the state of well-being. This approach provides a unique insight into the differences and similarities in experiences of well-being throughout a person's life. The assessment is structured under these five life stages, namely, New Beginnings, Childhood, Youth, Adulthood, Older People. The Childcare Sufficiency Assessment action plan will set specific targets which will support the local authority and wider partnerships to address the well-being needs of the people of Ceredigion.

The draft Well-being Assessment (November 2021) has identified the following needs and will be considered by the PSB to prioritise its five-year Local Well-being Plan.

### **Childhood**

The proportion of children living in workless households is estimated to be 9.9%, which is noticeably lower than the national average for Wales (13.5%). This, combined with the lower-than-average earnings across the County, suggest that in-work poverty is increasing and remains a key challenge for households. The areas affected the most in Ceredigion, and who have the largest proportion of households living in poverty, are Aberystwyth North, Cardigan & Aberporth and Aberystwyth South. Overall, child poverty in Ceredigion is higher than average and has seen the second highest increase nationally since 2014/15. In Ceredigion, 3,459 children are living in poverty. This is key a regional issue affecting West Wales as a whole.

Early language acquisition is increasingly important. In a globalising world, having a strong sense of identity and belonging, for example, being Welsh, can be both emotionally and culturally enriching. There is a good amount of Welsh-medium provision available in the county for pre-school age children due to the number of 'Cylchoedd Meithrin' in operation.

According to the Childcare Sufficiency Data 2022 - 2027, there are 853 pre-school/nursery/'Cylch Meithrin' places for 3-year-olds in Ceredigion and 83% are in Welsh-medium settings (up from 81% in last CSA).

Flying Start provides Childcare support, early year's health service and early speech and language support to families with children under the age of 4, who live in the most deprived areas of Ceredigion, and also support families in other areas through their Outreach programme. These initiative have proved to be highly effective for families in our most deprived areas.

### **Youth**

The challenging environment for Higher Education has meant that the student population of the county is also decreasing. Ceredigion's 18 to 24 population is dominated by students enrolled at the two universities - Aberystwyth University and University of Wales Trinity St David's (Lampeter Campus). Up to 9,000 students have been known to enrol in both universities collectively, but trends show that the number enrolling at Aberystwyth University has been decreasing since 2014/15, reaching 7,720 by 2019/20.

As a thriving university town, it is well served with activities for older youths and young adults. However, there are limited opportunities for younger people seeking to develop their growing independence, particularly in relation to employment, careers and affordable housing. These are recurring themes throughout the Assessment of Local Well-being and some of the issues often attributed to the out migration of young people from the County when they finish School or College.

The Assessment shows that younger people in Ceredigion identify connectivity, employment opportunities and affordability of housing as key to making a difference to their future.

### **Adulthood**

Before babies are born, factors can affect their life expectancy. Mothers that are obese, smoke, take drugs or drink alcohol throughout pregnancy are increasing the risk of their child developing serious chronic conditions, affecting their quality of life and life expectancy.

It is very natural to experience a range of emotions during and after pregnancy. Sometimes these emotions can be very difficult to cope with and can even begin to affect day-to-day lives. Studies suggest that between 10% and 20% of women develop a mental illness during pregnancy or within the first year of childbirth.

The Well-being Assessment identified that having a job or a paid occupation is, for most people, an essential part of an adult's well-being. Employment provides the necessary financial means for people to live healthy and sociable lives but can also provide a great sense of satisfaction and fulfilment. There is a strong link between poverty and longer-term health - a baby born into poverty is more likely to grow up with poorer health and well-being, and this is shown in the disparity between the healthy life expectancy in the most deprived areas of Ceredigion compared to the least deprived. For example, the gap in healthy life expectancy between the most and least deprived is higher for males by 9.3 years and by 6.7 years for females.

The Assessment of Local Well-being has identified the following main themes in relation to Childcare, and the Childcare Sufficiency Assessment Action Plan will support the Ceredigion Public Services Board and the Local Authority in addressing these challenges.

### **Summary:**

**Financial Considerations:** Low socio-economic status can affect parental self-esteem, self-confidence. Average incomes in Ceredigion are lower than average across Wales and therefore the cost of raising children is challenging for some parents. Cardigan & Aberporth is the community area with the highest proportion of its population in income deprivation at 19%.

**A Good Start:**

A strong foundation in the early years of childhood increases the probability of positive well-being outcomes. Social, emotional and behavioural support across the county can counteract the worst effects and long-term damage. Studies indicate that those experiencing Adverse Childhood Experiences (ACEs) are 4.7 times more likely to have low mental well-being and increased risk of developing a mental illness as an adult. Disadvantaged children and children growing up in poverty are more likely to experience multiple ACEs. Flying Start settings provide Childcare of the highest quality and have been highly effective in Ceredigion for families in our most deprived areas. Mothers in Ceredigion are significantly more likely to breastfeed their babies at 10 days following birth, and the rate of those breastfeeding who live in the Flying Start areas of Ceredigion is the highest in Wales.

**Poverty:** The socio-economic circumstances of children are a determining factor in their well-being and have a longer-term impact throughout their life. Data from the End Child Poverty Coalition shows that 31.8% of children (or 3,459) were living in poverty in Ceredigion as at 2019/20. This is not only higher than average for Wales, but Ceredigion has also seen the second highest increase nationally at 2.7% points over the previous five years. Poverty remains one of the biggest challenges for the county. Low earnings and incomes, affordable Childcare, Universal Credit reduction and high housing costs/ housing affordability are the drivers of poverty in Ceredigion.

**Play:** The provision and encouragement of children to take part in outdoor activities is essential during the recovery period from COVID-19. Engagement conducted for the Assessment of Local Well-being shows that attitudes of children towards outdoor play in Ceredigion are positive, but also highlighted their desire for more play areas and recreational facilities in the County. Although Ceredigion is a predominantly rural county with the second lowest population density in Wales, just 88% of properties have a private outdoor space (garden). This is lower than both Carmarthenshire (92%) and Pembrokeshire (90%) in the West Wales region, but also the second lowest nationally behind Cardiff (85%). According to the 2019 Ceredigion Play Sufficiency Assessment there were 74 play spaces in the county. When considering that there are 151 towns and villages across Ceredigion, it is apparent that not everyone has access to the green space required to maintain physical health and well-being.

**Career Prospects:**

Unemployment in the county has been lower than average in recent years, with around 1,400 people (3.7% of the economically active) currently reporting themselves as unemployed. Although the unemployment rate has increased during the COVID-19-19 pandemic from 2.6% to 3.7%, it remains below the average for Wales. Career progression is more difficult in economies like Ceredigion where there is a very limited

number of medium and larger sized businesses that can provide career paths and addressing this is one of the priorities in the Ceredigion Economic Strategy for the next fifteen years.

**In-work poverty:** Economic measures do not immediately highlight the issue of in-work poverty. For example, the Economic Activity rate, employment rate and the proportion of workless households in Ceredigion all perform better than the national average. Yet, there are still 32.4% of households living in poverty in Ceredigion. These figures, combined with low average earnings and incomes in the county strongly point to in-work poverty continuing to be a significant issue in Ceredigion.

**Work-life balance / mental health:** It is essential that parents can access the correct support that they need for their health and mental well-being and recognising perinatal mental health conditions. Ensuring that parents have adequate paid leave around the time of the birth of a child is important for the well-being of both the infant and the parents.

## 6 POPULATION

Ceredigion covers quite a large geographical area (1,900km<sup>2</sup>), but has one of the smallest populations in Wales (72,900) and only 14.7% of the population are children aged 0-15 (which equates to 10,800 children). In the main, Ceredigion is not considered deprived relative to other areas in Wales, in terms of income, employment, health or education, although there are small pockets of acute deprivation. However, issues of whether people can access services and the quality and affordability of housing can have an impact on communities across the county.

Levels of employment for Ceredigion are slightly above the national average but are skewed downwards by the number of non-working Higher Education students that account for 10% of the population. Conversely, the median weekly wage is lower than the Welsh National average (£549 compared to £563). However, encouragingly, this has increased significantly over the last year (an increase of 21% since 2020).

Ceredigion's economy relies heavily on the public sector (Universities, Schools, Health and Local Government); however, jobs have decreased in recent years due to service and funding cuts. Less than 1% of Ceredigion's employers are 'medium sized', which employ between 50 and 249 people. Ceredigion continues to have a high proportion of its workforce engaged in self-employment (around 3 in 20 are self-employed), although the number of self-employed has decreased since the onset of the COVID-19-19 pandemic in March 2020. During 2020, just under a third of residents (31%) worked from home in some capacity.

Child poverty in Ceredigion is higher than average (around 1 in 3 children live in poverty) and the county has seen the second highest increase nationally since 2014/15. On the other hand, the proportion of children in workless households in Ceredigion is estimated to be 9.9%, which is

noticeably lower than the all-Wales average (13.5%). This, and other evidence such as the better than average employment rate and economic activity rate, suggests that in-work poverty is a particular concern for households.

Ceredigion has lower than average levels of childhood obesity (21.9%) compared to the national average (26.9%), based on the most recent data from the 4–5-year-old Childhood Measurement Programme for Wales (2018/19). Prior to this, childhood obesity had been increasing in Ceredigion, and is continuing to increase nationally.

At the time of the last published Census of 2011, 47% of residents spoke Welsh. Although this is significantly above the national average (19%), this is the first time on record that the proportion of Welsh speakers in the county fell below 50%. However, subsequent surveys in the years since the last Census present a more positive picture, albeit based on surveys rather than the whole population. The Annual Population survey for instance, suggests that Welsh speakers in Ceredigion have been increasing in recent years. In 2011, 55.1% of respondents said they could speak Welsh, increasing to 62.3% in 2021.

Research has shown that the socio-economic status and the type of employment has an effect on parenting. Employment income tends to be low in Ceredigion. Flying Start has been highly effective in Ceredigion for families in our most deprived areas, offering parenting classes and courses, free Childcare as well as providing a network of support to new parents and families.

### Population figures (current and projections) by ages of children

**Table 6.1: Current Population by single year of age**

MYE 2020	
Aged 0	501
Aged 1	539
Aged 2	606
Aged 3	592
Aged 4	639
Aged 5	715
Aged 6	670
Aged 7	670
Aged 8	713
Aged 9	807
Aged 10	757

**Table 6.2 Projected population by age group of child**

	2020	2025	2030
Aged 0-11	7,903	7,468	6,978
Aged 12-16	3,619	3,841	3,614
	11,522	11,492	11,611
Aged 3 and 4	1,231	1,180	1,103

*Source: ONS 2020 Mid-Year Estimate of Population and WG 2018-based principal projection*

Aged 11	694
Aged 12	709
Aged 13	714
Aged 14	730
Aged 15	718
Aged 16	748
	11, 522

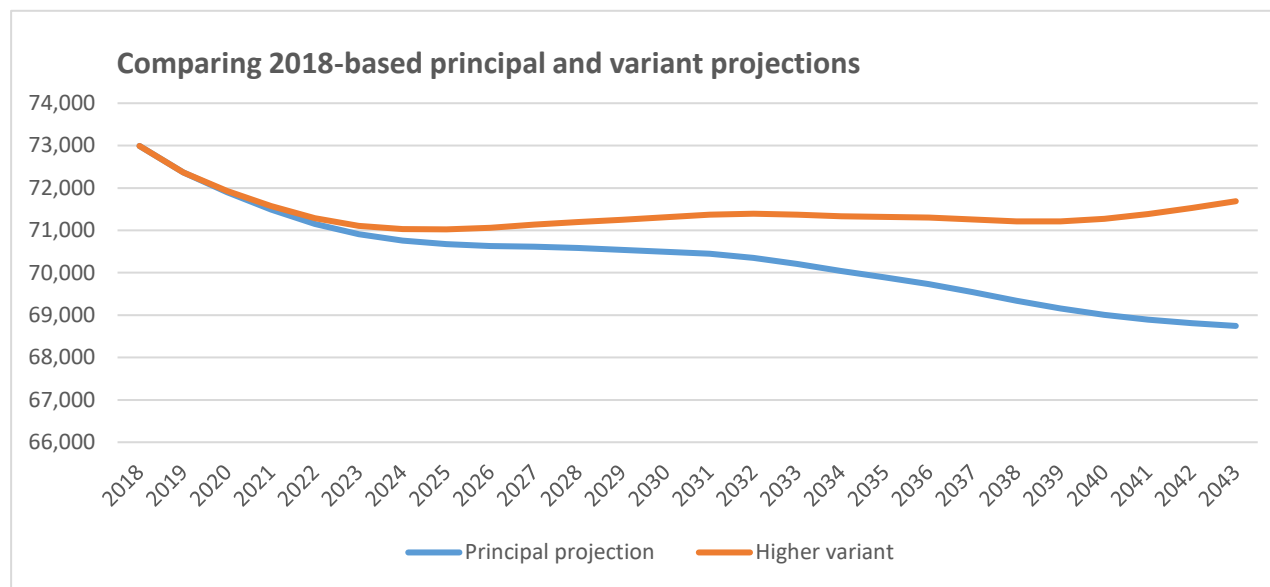
Source: ONS 2020 MYE

2020 Mid-Year Estimate of Population: 72,900  
 2011 Census Estimate of Population: 75,900

**Table 6.3: Projected population:**

Projection	Age group	2021	2026	2031	2036
<i>Principal</i>	<i>All ages</i>	71,491	70,629	70,445	69,731
	15 and under	10,868	10,418	9,704	9,362
	16 to 64	41,824	40,311	39,466	38,038
	65 and over	18,798	19,900	21,274	22,331
<i>Higher variant</i>	<i>All ages</i>	71,570	71,062	71,372	71,300
	15 and under	10,900	10,617	10,116	10,019
	16 to 64	41,844	40,443	39,777	38,590
	65 and over	18,827	20,001	21,479	22,690

**Figure 6.1: Comparing 2018-based principal and variant projections:**



The latest estimate of Ceredigion’s population (2020) is lower than the 2011 Census figure (72,900 compared to 75,900). There are large numbers of Higher Education (HE) students enrolled in the two universities in the county – Aberystwyth University and the Lampeter campus of the University of Wales Trinity St. David, who account for approximately 10% of the county’s population. The high proportion of students within the County means that fluctuations in student recruitment have an unusually large impact on the size of the population. For instance, the number of HE students enrolled at Aberystwyth University between 2011 and 2020 reduced by nearly half (11,705 students in 2011 compared to 6,265 in 2020), which has significantly impacted Ceredigion’s population figures.

The 2018-based projections reflect a reversal in the demographic trend compared to the 2014-based set, which suggested a growth of approximately 5,400 people and 2,800 households between 2017 and 2037, from 76,000 to 81,500. This recent downward trend in the 2018-based projections is due to demographic changes (e.g., declining fertility, mortality and migration), but also changes to the methodology. As mentioned above, the decline in the number of students in Higher Education in the County is also a driver of the projected population decline. The 2018-based principal (main) projection predicts that the population of Ceredigion will decrease by 5.8% over the 25-year period, to 68,745 in 2043. Even when the highest variant (based on high fertility, life expectancy and migration rates) is considered, the population of the County is still expected to decline, albeit less significantly.

**Table 6.4: Projection population figures:**



The average number of births in the county between 1992 and 2015 was 638. The principal projection provides the figures below:

	Average number of births
2018-19	572
2019-20	573
2020-21	560
2021-22	545
2022-23	533
2023-24	524
2024-25	516
2025-26	509
2026-27	503

#### Live birth rates

Over the past twenty years there have been on average around 612 births per year in Ceredigion, mostly singletons. In 2020 there were 2,900 children aged under 5 years; 500 children under 1 year old, 540 aged 1 year; 600 aged 2 years; 590 aged 3 years and 640 aged 4 years.

The birth rate in Ceredigion is the lowest in Wales, with a general fertility rate of 41.4 births per 1,000 women aged 15 to 44. This is largely due to the high proportion of young females in higher education who are unlikely to have children whilst studying.

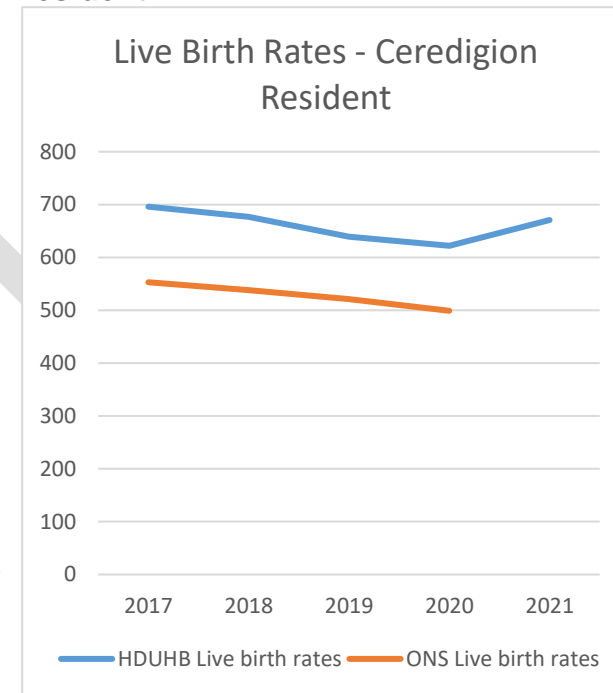
**Table 6.5: Live birth rates**

Source	Hywel Dda University Health Board	Nomis 18 October 2021
	<b>Children Born Between: 01-January And 31-December by Ceredigion resident mothers: Total number of live births for mothers resident in the district</b>	<b>Live births in England and Wales : birth rates down to local authority areas (Ceredigion)</b>
2017	696	553
2018	677	538
2019	639*	521
2020	622	499**
2021	671	

\*2019 HDUHB change in recording system

\*\*2020 ONS birth registrations in England and Wales were delayed because of the coronavirus (COVID-19) pandemic.

**Figure 6.2: Live birth rates - Ceredigion resident**



Figures differ between ONS and HDUHB data received – but the trend is similar and has seen a decline since 2017. However, there is a slight increase from 2020 in birth rates, which supports anecdotal local knowledge.

**Number of working households with dependent children**

At the 2011 Census, there were 845 households with dependent children where there were no adults in work. This represents approximately 11% of the 7,203 households with dependent children recorded in the Census.

**Number of families from ethnic minority backgrounds**

Of the close to 5,700 households with dependent children at the 2011 Census, the Household Reference Person was white in 96% (including 3% 'Other White'). The next highest category was Asian/Asian British in 2% of cases, with less than 1% in any of the other ethnic groups defined in the Census.

**Number of dependent children living in Relative and Absolute low-income families**

During 2020, there were 2,368 (22%) children (aged under 16) living in families in Relative low income and 1,741 (16%) children living in Absolute low incomes across Ceredigion. Since 2015, the number of children in Relative low-income families has increased by 24%, whilst the number living in Absolute low-income families has decreased by 13%, according to DWP and HMRC Children in low-income families' statistics. This dataset has replaced DWP's Children in-out-of-work benefit households and HMRC's Personal Tax Credits: Children in low-income families' local measure.

*A Relative low income family is defined as a family in low income Before Housing Costs (BHC) in the reference year. A family must have claimed Child Benefit and at least one other household benefit at any point in the year to be classed as low income. Absolute low income families are defined as a family in low income BHC in the reference year in comparison with income in the financial year ending 2011.*

**Table 6.6: Number of lone parent families with dependent children**

Family Type	
All lone parent households with dependent children	1,514
Lone parent in part-time employment: Total	549
Lone parent in full-time employment: Total	454
Lone parent not in employment: Total	511

Source: ONS 2011 Census table KS207UK

### **Number of Welsh language speakers and learners**

Approximately 47% of the population aged 3 and over were able to speak Welsh at the 2011 Census. Although the proportion of Welsh speakers declined from the previous Census (2001), this decline was not consistent across all age groups. The percentage of 3–15-year-olds in Ceredigion that can speak Welsh increased from 77.2% in 2001 to 78.4% in 2011, an increase of 1.2 percentage points. This demonstrates that the Welsh-medium education system is effective in increasing the use of Welsh language of children in the County.

The number of Welsh learners in the County is very difficult to quantify, however, we know that during 2020/21, 5,444 of our school children in years 1-11 were taught Welsh as a first language (the total number of pupils was 9,700).

**Census 2021** - 97% of households across England and Wales responded to Census 2021. Results are expected mid-2022 and will be factored into subsequent annual action plan figures.

**Table 6.7: Mid-Year Estimates Children 0-17 2020**

Mid-Year Estimate 2020	Number of children	Number of children in school
0-3	2,238	
4-11	5,665	4700
11-17	5,025	
<b>TOTAL</b>	<b>12,928</b>	

**Table 6.8: Mid-Year Estimates Children 0-16 2015 & 2020:**

Mid-Year Estimate	2020	2015
Aged 0	501	648
Aged 1	539	631
Aged 2	606	651
Aged 3	592	658
Aged 4	639	777
Aged 5	715	711
Aged 6	670	654
Aged 7	670	681
Aged 8	713	703
Aged 9	807	685
Aged 10	757	671
Aged 11	694	696
Aged 12	709	689
Aged 13	714	659
Aged 14	730	710
Aged 15	718	729
Aged 16	748	770
<b>TOTAL</b>	<b>11522</b>	<b>11723</b>

**Table 6.9: Mid-year Estimate of Population:**

Mid-year Estimate of Population	
2011 (Census Estimate)	75,900
2015	74,600
2020	72,895

<b>Table 6.10: Projected population by age group of child:</b>				
	<b>2015</b>	<b>2020</b>	<b>Actual 2020</b>	<b>2025</b>
Aged 0-11	8200	8000	<b>7903</b>	8000
Aged 12-16	3600	3600	<b>3619</b>	3600
<b>TOTAL</b>	<b>11800</b>	<b>11600</b>	<b>11522</b>	<b>11600</b>
Aged 3 and 4	1400	1300	1231	1400

Source: ONS 2015 Mid-Year Estimate of Population and WG 2014-based principal projection

## CHILDREN WITH DISABILITIES

### Number of children with special educational needs or a disability

In 2020/21, the Pupil Level Annual School Census (PLASC) showed that there were 2,433 pupils in Ceredigion with Special Educational Needs.

### Information on the number of children with disabilities

**Table 6.11: Number of children with disabilities with Tim Plant Anabl (TPA)**

<b>Age Range</b>	<b>Number of Children 2017</b>	<b>Number of children 2021 -TBC</b>
0	2	3
1	1	0
2	2	1
3	3	5
4	11	5
5	6	11
6	10	10
7	13	12
8	9	11
9	2	14
10	12	12

11	20	16
12	11	17
13	12	15
14	17	14
15	12	23
16	17	22
17	13	14
18	4	7
<b>Total number of children under TPA</b>	<b>177</b>	<b>212</b>

**Table 6.12: Children in need at 31 March by age, gender, looked after status and ethnicity, including unborn children**

Year	All children in need			All children in need
	Children with a disability	Children with no disability	Not applicable	
2010	165	265	*	435
2011	170	300	*	470
2012	120	320	*	445
2013	95	315	*	410
2014	80	335	*	420
2015	95	350	*	450
2016	80	385	*	465

Source: StatsWales, Children in Need Census

**Table 6.13: All children receiving care and support 31 March 2020 by age, looked after status, ethnicity and on child protection register (Change in recording method)**

	All children receiving care and support	
--	---	--

Year	Children with a disability	Children with no disability	Not applicable	All children in need
2017	180	250	*	430
2018	140	255	*	390
2019	160	205	*	360
2020	195	220	*	410
			*	

Source StatsWales [Children receiving care and support by local authority and age group \(gov.wales\)](#)  
 StatsWales [StatsWales \(gov.wales\)](#)

**Table 6.14: Children receiving care and support by local authority and age group**

All children receiving care and support	Under 1	1-4	5-9	10-15	16 and over
2020	5	55	120	185	45
2019	10	55	95	155	45
2018	15	55	115	150	55
2017	15	65	110	170	65

**Table 6.15: Children with a disability**

Children with a disability	Under 1	1-4	5-9	10-15	16 and over
2020		20	50	100	25
2019		20	40	70	25
2018		10	40	65	20
2017	*	15	40	90	30

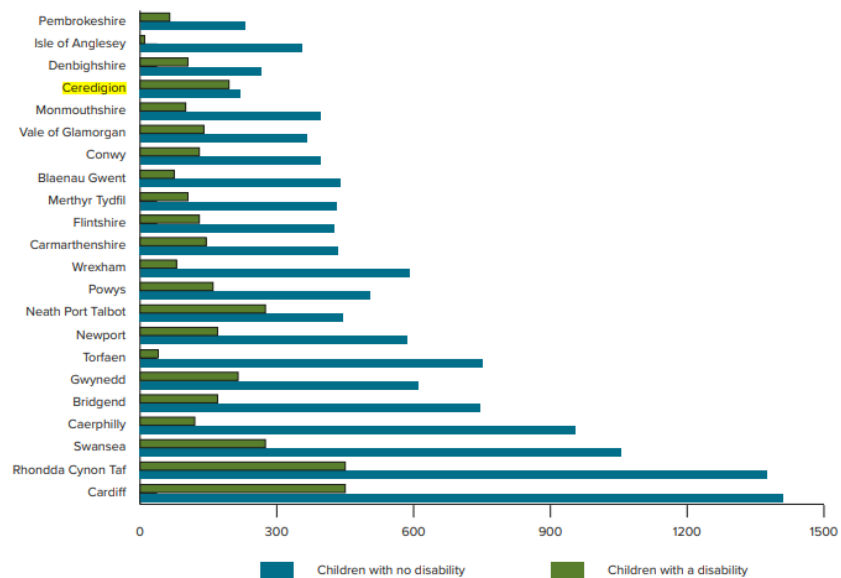
\*The data item is disclosive or not sufficiently robust for publication

Source: [Children receiving care and support by local authority and age group \(gov.wales\)](#)

Care Inspectorate Wales (CIW) carried out inspections of disabled children’s services in 4 Local Authority areas including Ceredigion County Council and noted that consideration had been given to the Additional Learning Needs and Education Tribunal (Wales) Act 2018. The School Services has appointed an Early Years Additional Learning Needs Lead Officer (EYALNLO) to be responsible for the pre-school children identified with additional learning needs.

**Figure 6.3: Children receiving care and support at 31 March 2020- by LA and disability:**

Children receiving care and support at 31 March 2020, by local authority and disability



Source: CIW National Review of early help, care and support and transition for disabled children in Wales



## 7 OVERVIEW – CHILDCARE TYPES, SERVICES AND PLACES

Care Inspectorate Wales (CIW) require providers to register under the category of Day Care or Childminder. However, under the day care registration there are five sub categories Sessional Day Care; Full Day Care; Out of School Care; Open Access Play; or Crèche. Since the introduction of the Childcare Offer, many Sessional Day Care providers who provided morning and afternoon sessions increased their opening hours and changed their registration to Full Day Care. This does cause confusion for parents looking for Childcare as they are normally open for school hours, term time only, and for children aged 2-4. The traditional Full Day Care providers are Day Nurseries and offer Childcare for children aged 0-12, 10 hours a day, all year round. The Full-day care nurseries are better placed to offer Childcare for a full working day.

In order to differentiate between Full Day Care and the Sessional providers that provided Full Day Care - we have applied our own service type criteria for the purpose of this report. We have analysed the data for **Full Day Care (Day Nurseries)** and **Full Day Care (Sessional)**. It has also been split into Term time and Holiday provision as we believe this will better help parents find the Childcare that they need.

### **Self-Assessment of Service Statement (SASS)**

The anonymised information collected from all registered Childcare providers by CIW in July 2021 through the **Self-Assessment of Service Statement (SASS)** was shared with each Local Authority in the autumn term. The data was analysed, updated and 'cleansed' for Autumn Term (i.e. voluntarily suspended services were disregarded if suspended for more than one year) to more accurately reflect the number of active Childcare settings in Ceredigion.

*(A caveat must be placed on all the data and subsequent results and conclusions drawn from them. Technical anomalies in the dataset received must be considered and the data and statistics presented must be used with caution, and in conjunction with current information before drawing any conclusions)*

**Therefore, the numbers of providers have changed from 102 settings recorded in the SASS to 91 active registered Childcare settings in Ceredigion, and this data will be used as the baseline for this Assessment.**

Ceredigion Childcare providers make up approximately 2.5% of all Wales CIW registered settings. Ceredigion's population is 2.3% of all Wales population from 2020 mid-year ONS figures. Therefore the proportion of registered settings is similar to the percentage of Wales population that the county represents in broad comparison, but does not factor in the proportion of children in the area where there is a higher than Wales average percentage of economically inactive-retired population.

**7.1 REGISTERED PROVISION**

**Table 7.1.1: All Childcare Provision:**

Childcare Type	Registered	Unregistered / Approved	Childcare Services Offered	Registered	Unregistered / Approved
Sessional Day Care	8	1	Term Time Only	8	1
Sessional Full Day Care	21		Term Time Only	18	
Sessional Full Day Care			Term time and holidays	3	
Full Day Care Nursery	6		Term time and holidays	6	
Childminder	45		Term Time only	1	
Childminder			Term Time only / After school	1	
Childminder*			Term time and holidays	43	
Out of School Care	5	3	Term Time Only	5	3
Out of School Care	2	1	Term time and holidays	2	1
Out of School Care	2		Holidays only	2	
Crèche and Holiday Playscheme	1		Term Time and Holidays	1	
Crèche	1		Term time only	1	
Nanny	0			0	
<b>TOTAL</b>	<b>91</b>			<b>91</b>	

**Developing and New Childcare Provision:**

One new Unregistered Sessional Day Care (Cylch Meithrin) setting opened September 2021. It is applying for Sessional Full Day Care registrations for 19 places. This setting received Childcare Offer Capital Grant funding for a new premises to be developed within the school building, and has opened as an unregistered setting whilst waiting for CIW registration (awaiting approval Spring 2022).

In addition to the above, there is one newly registered Childminder since January 2022 and one Childminder (awaiting site visit) working towards registration by April 2022. The statistics for these settings are therefore not included in this Assessment but will be reported on progress in the future.

One After School Club suspended their service due to COVID-19 restrictions initially, but since schools have reopened, the club have not been able to reopen due to staffing issues. The School and Childcare Unit have jointly explored options for reopening which included circulating an Expression of Interest form to the Childcare sector in Ceredigion and Carmarthenshire to take on responsibility for service delivery. Unfortunately there were no expressions of interest submitted. This is an ongoing project and more options and discussion will be explored.

Unfortunately, three After School Clubs closed permanently due to the pandemic and issues recruiting Committee volunteers, and subsequently dissolved their respective charities. The Childcare Unit are working with existing sessional full day care provider to expand their services and age range to replace previous services that were unavailable in two of the areas that also provided support for children with ALN.

**7.2 UNREGISTERED CHILDCARE SETTINGS:**

Support is provided to 4 unregistered After School Club settings with regard to advice on becoming registered settings. 3 are on school sites, with another independent organisation providing an after school facility for school aged children.

Some but not all settings have provided us with the details of child spaces, hours and fees charged as requested. However, they continue to receive information and newsletters from the Childcare Unit, and are aware of the support available if they wish to consider becoming registered providers.

**Table 7.1.2: Unregistered After School Childcare:**

<b>MSOA</b>	<b>Setting / School</b>	<b>Open now? (January 2022)</b>	<b>If not - when?</b>	<b>Number of children that can attend per session</b>	<b>Actual attendance per day</b>	<b>Sessions per week</b>
Beulah, Troed-yr-aur & Llandysul	Cenarth	Trial for a month	After school until 5:15pm	16	2 -3	4 (Mon – Thurs )

Aberystwyth South	Plascrug	Yes	N/A	50	40 - Split between 2 halls	5 (Monday to Friday)
Borth & Bont-goch	Talybont	Yes	N/A	16	5 -6	3 - Monday to Thursday usually but currently only Tuesday to Thursday
New Quay & Penbryn	Independent organisation not on school site		Re-opening end of February / beginning March			After School and Holiday Provision

Ysgol T Llew Jones are hoping to restart their after school service in the next academic year dependent on COVID-19 restriction and demand from parents, whilst Penparc School are keen to re-open as soon as possible. All other known unregistered settings are supported by the Childcare Unit with regular information and advice.

**EXCEPTED / APPROVED PROVISION:**

**7.3** There have been no Nannies operating under the Approval of Home Childcare Providers (Wales) Scheme in Ceredigion since October 2021 – therefore we have zero excepted/approved services to report on in this Assessment.

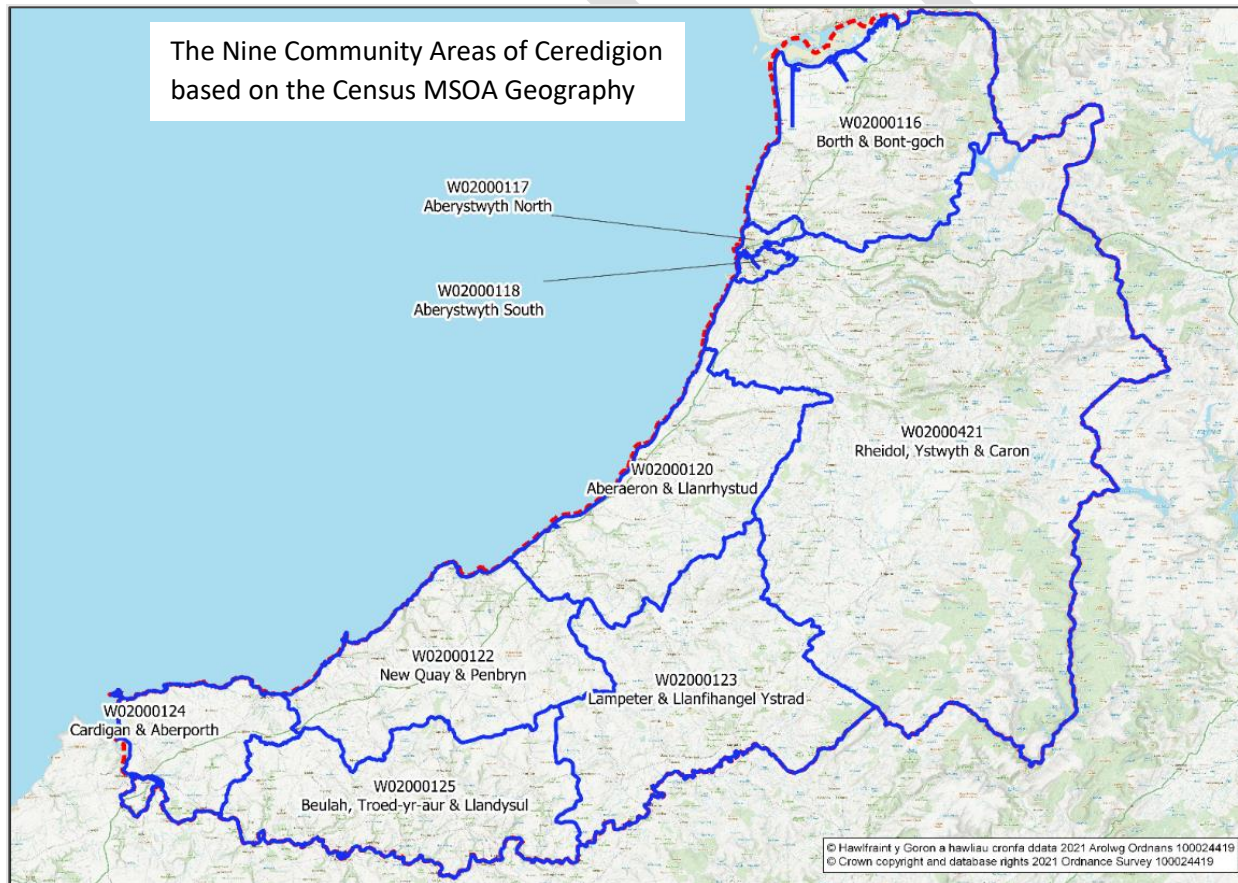
**7.4 GEOGRAPHICAL DISTRIBUTION OF CHILDCARE PROVIDERS & SERVICES PROVIDED (REGISTERED AND EXCEPTED/ APPROVED)**

Ceredigion’s Well-being Assessment and this CSA is based on the nine Middle Super Output Areas (MSOAs), and these are the community areas used to identify specific assets and challenges relating to well-being:

1. Borth and Bont-goch
2. Aberystwyth North

3. Aberystwyth South
4. Aberaeron & Llanrhystud
5. New Quay & Penbryn
6. Lampeter & Llanfihangel Ystrad
7. Cardigan & Aberporth
8. Beulah, Troed-yr-aur & Llandysul
9. Rheidol, Ystwyth & Caron

**Figure 7.4.1: Map of Ceredigion's Community Areas or Middle Super Output Areas (MSOA's)**



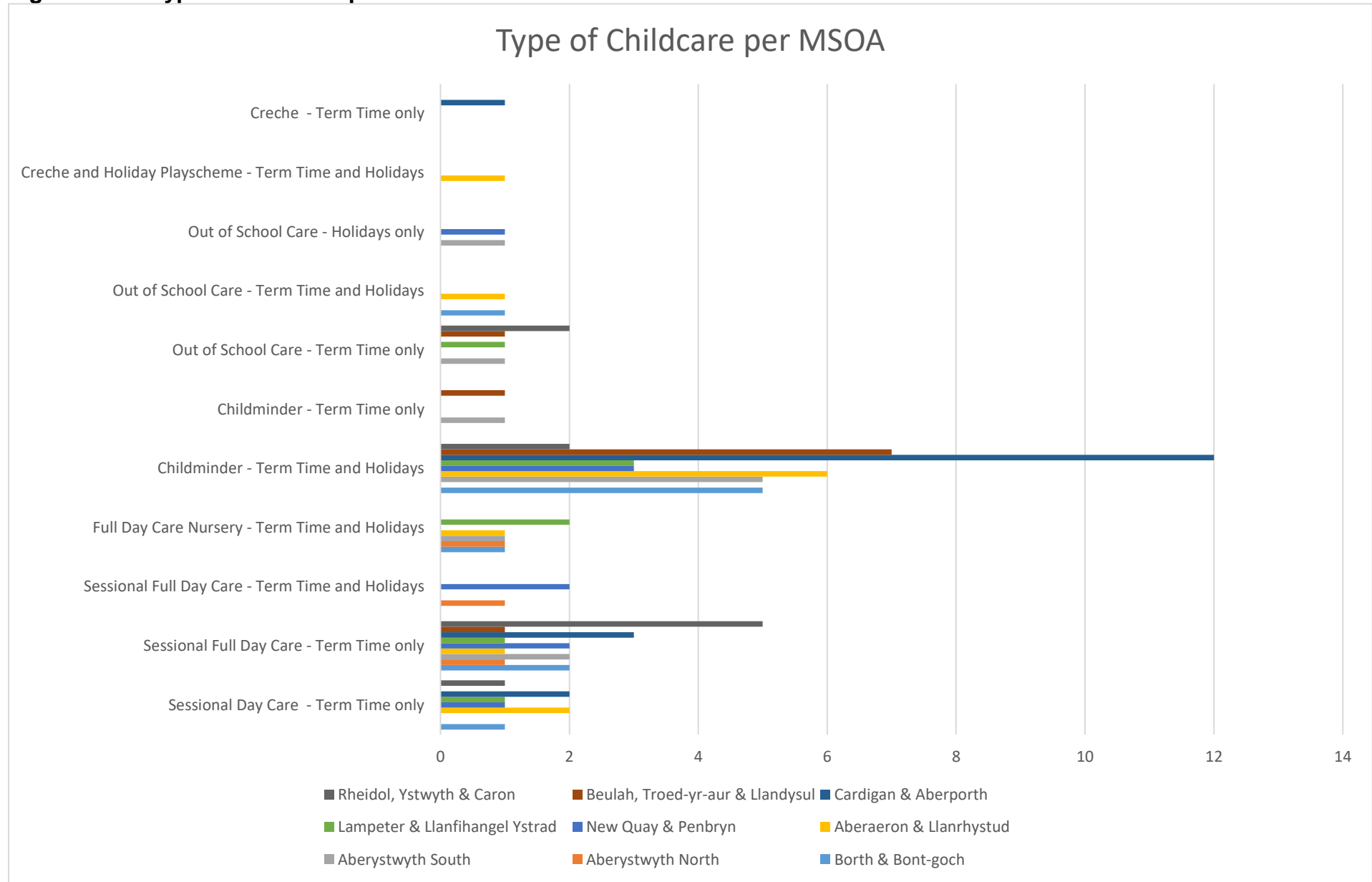
**Table 7.4.1: Total Number of providers Term & Holiday provision per MSOA:**

Type of care: Total Number of providers Term & Holiday provision Per MSOA	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Liandysul	Rheidol, Ystwyth & Caron	TOTAL
Sessional Day Care - Term Time only	1			2	1	1	2		1	8
Sessional Full Day Care - Term Time only	2	1	2	1	2	1	3	1	5	18
Sessional Full Day Care - Term Time and Holidays		1			2					3
Full Day Care Nursery - Term Time and Holidays	1	1	1	1		2				6
Childminder - Term Time and Holidays	5		5	6	3	3	12	7	2	43
Childminder - Term Time only			1					1		2
Out of School Care - Term Time only			1			1		1	2	5
Out of School Care - Term Time and Holidays	1			1						2
Out of School Care - Holidays only			1		1					2
Crèche and Holiday Playscheme - Term Time and Holidays				1						1
Crèche - Term Time only							1			1
Nanny										0
<b>Total Number of settings per MSOA</b>	<b>10</b>	<b>3</b>	<b>11</b>	<b>12</b>	<b>9</b>	<b>8</b>	<b>18</b>	<b>10</b>	<b>10</b>	<b>91</b>

Number of Children Currently Registered to Care For	199	120	215	198	132	180	201	157	168	<b>1570</b>
Sessional Setting working towards registration								1		<b>1</b>
Unregistered Out of school Care – Term Time only	1		1		1			1		<b>4</b>

DRAFT

**Figure 7.4.2: Type of Childcare per MSOA:**





**Table 7.4.2: Number of Children Registered for:**

No of Children Currently Registered to Care For	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel	Cardigan & Aberporth	Beulah, Troed-y-raur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
Sessional Day Care - Term Time only	20			31	14	12	35		19	131
Sessional Full Day Care - Term Time only	34	63	38	19	31	19	70	50	93	417
Sessional Full Day Care - Term Time and Holidays					39					39
Full Day Care Nursery - Term Time and Holidays	54	57	75	33		87				306
Childminder - Term Time and Holidays	41		34	60	18	22	87	59	16	337
Childminder - Term Time only			6							6
Childminder - Term Time only/After School								8		8
Out of School Care - Term Time only			32			40		40	40	152
Out of School Care - Term Time and Holidays	50			32						82
Out of School Care - Holidays only			30		30					60
Crèche and Holiday Playscheme - Term Time and Holidays				23						23
Crèche - Term Time only							9			9
<b>TOTAL</b>	<b>199</b>	<b>120</b>	<b>215</b>	<b>198</b>	<b>132</b>	<b>180</b>	<b>201</b>	<b>157</b>	<b>168</b>	<b>1570</b>

**Table 7.4.3: Total Children on Register:**

The total number of children on your books	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
Sessional Day Care - Term Time only	16			37	19	29	34		13	148
Sessional Full Day Care - Term Time only	41	15	59	21	38	17	92	66	86	435
Sessional Full Day Care - Term Time and Holidays		60			17					77
Full Day Care Nursery - Term Time and Holidays	97	75	78	72		115				437
Childminder - Term Time and Holidays	42		37	31	14	23	75	61	6	289
Childminder - Term Time only			2							2
Childminder - Term Time only/After School								2		2
Out of School Care - Term Time only			28			19		0	46	93
Out of School Care - Term Time and Holidays	179			31						210
Out of School Care - Holidays only			15		0					15
Crèche and Holiday Playscheme - Term Time and Holidays				26						26
Crèche - Term Time only							0			0
<b>TOTAL</b>	<b>375</b>	<b>150</b>	<b>219</b>	<b>218</b>	<b>88</b>	<b>203</b>	<b>201</b>	<b>129</b>	<b>151</b>	<b>1734</b>

With regard to vacancies and waiting lists figures, caution must be used in using these as baseline data. Some settings were not open during this period, and some have still not reopened their service mostly due to staff shortages.

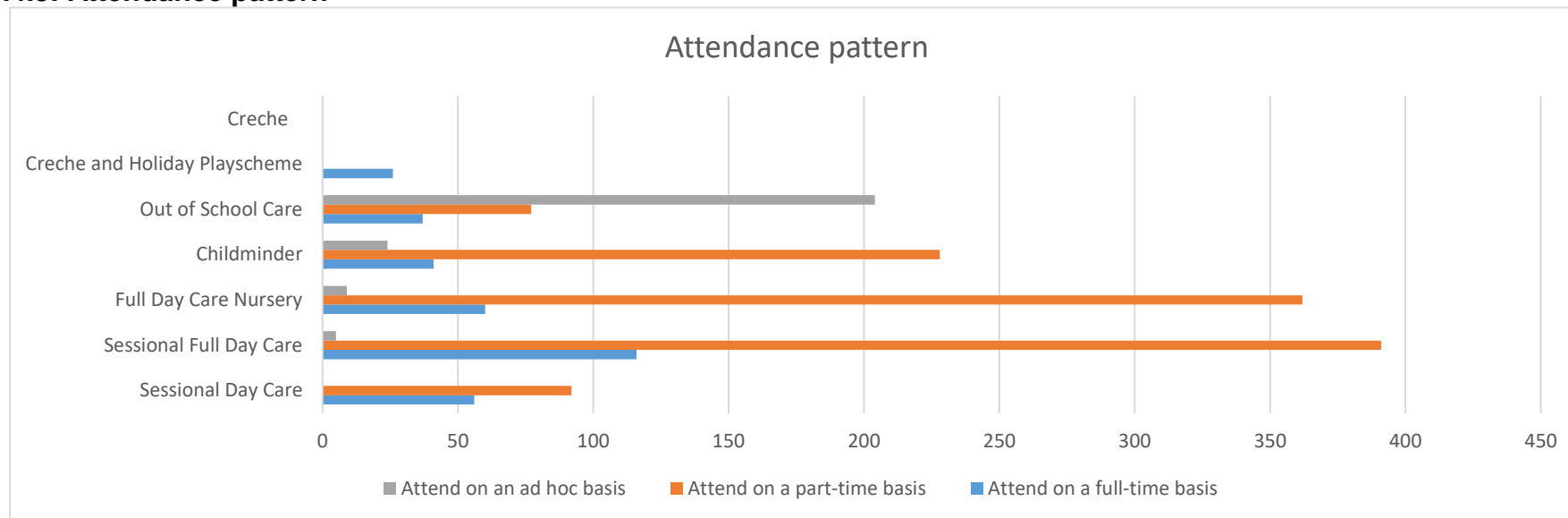
Some settings e.g. After School Clubs were open for very few children as parents slowly returned to work routines. This has skewed the figures with regard to vacancies recorded and is not a true reflection of usual attendance at these settings (*children on waiting list for an immediate place/ unfilled spaces for the service*).

**Table 7.4.4: Waiting lists and unfilled spaces:**

The total number of children on your books	How many children are on the waiting list for an immediate place?	TOTAL unfilled spaces
Sessional Day Care - Term Time only	24	17
Sessional Full Day Care - Term Time only	43	1458
Sessional Full Day Care - Term Time and Holidays	6	206
Full Day Care Nursery - Term Time and Holidays	26	59
Childminder - Term Time and Holidays	28	119
Childminder - Term Time only	0	1
Childminder - Term Time only/After School	0	0
Out of School Care - Term Time only	0	56
Out of School Care - Term Time and Holidays	12	4
Out of School Care - Holidays only	0	0
Crèche and Holiday Playscheme - Term Time and Holidays	0	23
Crèche - Term Time only	0	0
<b>TOTAL</b>	<b>139</b>	<b>1943</b>

**Attendance Pattern:**

**Figure 7.4.3: Attendance pattern**



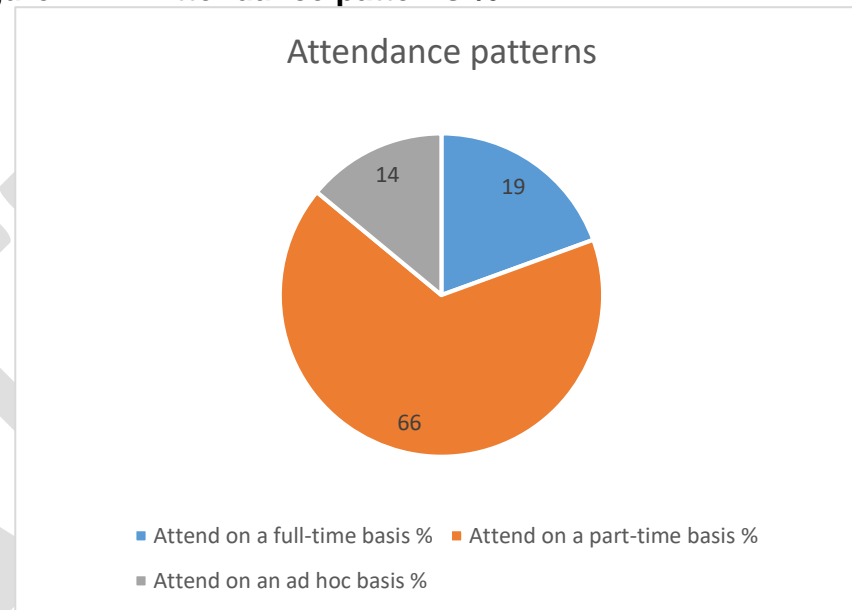
**Table 7.4.5: Attendance patterns – full, part time and ad-hoc**

Attendance pattern:	The total number of children on register	Attend on a full-time basis %	Attend on a full-time basis	Attend on a part-time basis %	Attend on a part-time basis	Attend on an ad hoc basis %	Attend on an ad hoc basis
Sessional Day Care	148	38	56	62	92	0	0
Sessional Full Day Care	512	23	116	76	391	1	5
Full Day Care Nursery	437	14	60	83	362	2	9
Childminder	293	14	41	78	228	8	24
Out of School Care	318	12	37	24	77	64	204
Crèche and Holiday Playscheme	26	100	26	0	0	0	0
<b>TOTAL</b>	<b>1734</b>	<b>19%</b>	<b>336</b>	<b>66%</b>	<b>1150</b>	<b>14%</b>	<b>242</b>

**Table 7.4.6: Attendance patterns – full, part time and ad-hoc percentage:**

Attendance patter	Attend on a full-time basis %	Attend on a part-time basis %	Attend on an ad hoc basis %
<b>TOTAL</b>	<b>19</b>	<b>66</b>	<b>14</b>

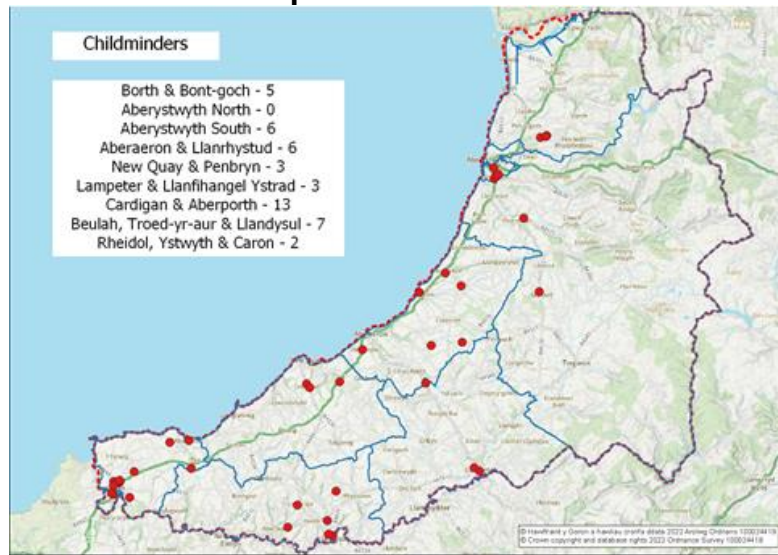
**Figure 7.4.4: Attendance patterns %**



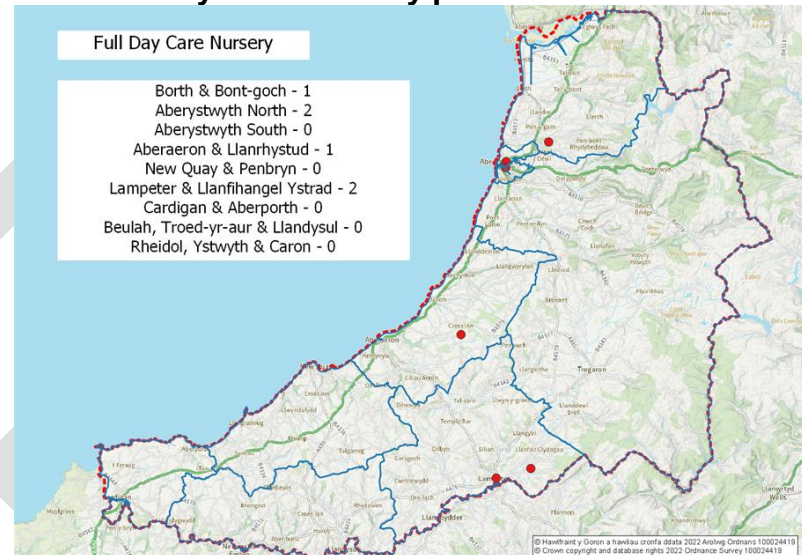
Two-thirds of all children attend Childcare on a part-time basis (66%) with 19% attending full time Childcare. The 'part time' attendance figures in the SASS does not indicate if the Childcare is shared between different Childcare providers and that the child attends some form of Childcare full time e.g. Cylch Meithrin Sessional Care and Childminder. Neither does it differentiate between age groups. Many 3-4 year olds would be part time sessional care and part time education, but this is not reflected in the SASS survey. However, we have seen evidence from the parent surveys that parents use a combination of different Childcare provision and family/friends.

**8 CHILDCARE PLACES – SUPPLY AND DEMAND PER CHILDCARE TYPE**

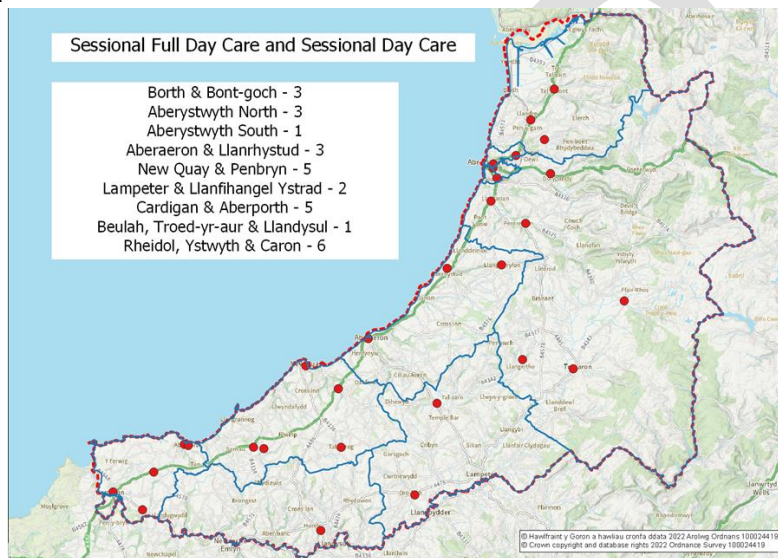
**Figure 8.1: Childminders per MSOA**



**Figure 8.2: Full Day Care Nursery per MSOA**



**Figure 8.3: Sessional Full Day Care and Sessional Day Care per MSOA**



**Figure 8.4: Out of School Care, Crèche & Holiday Playscheme and Crèche per MSOA**

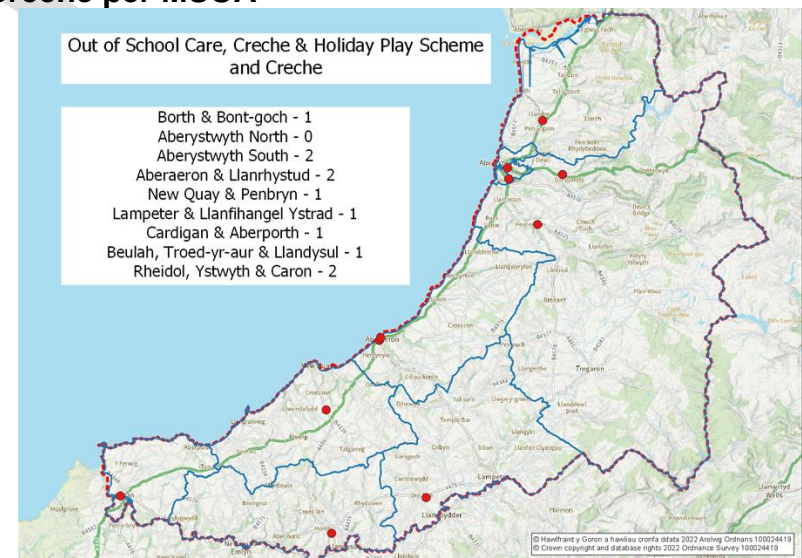
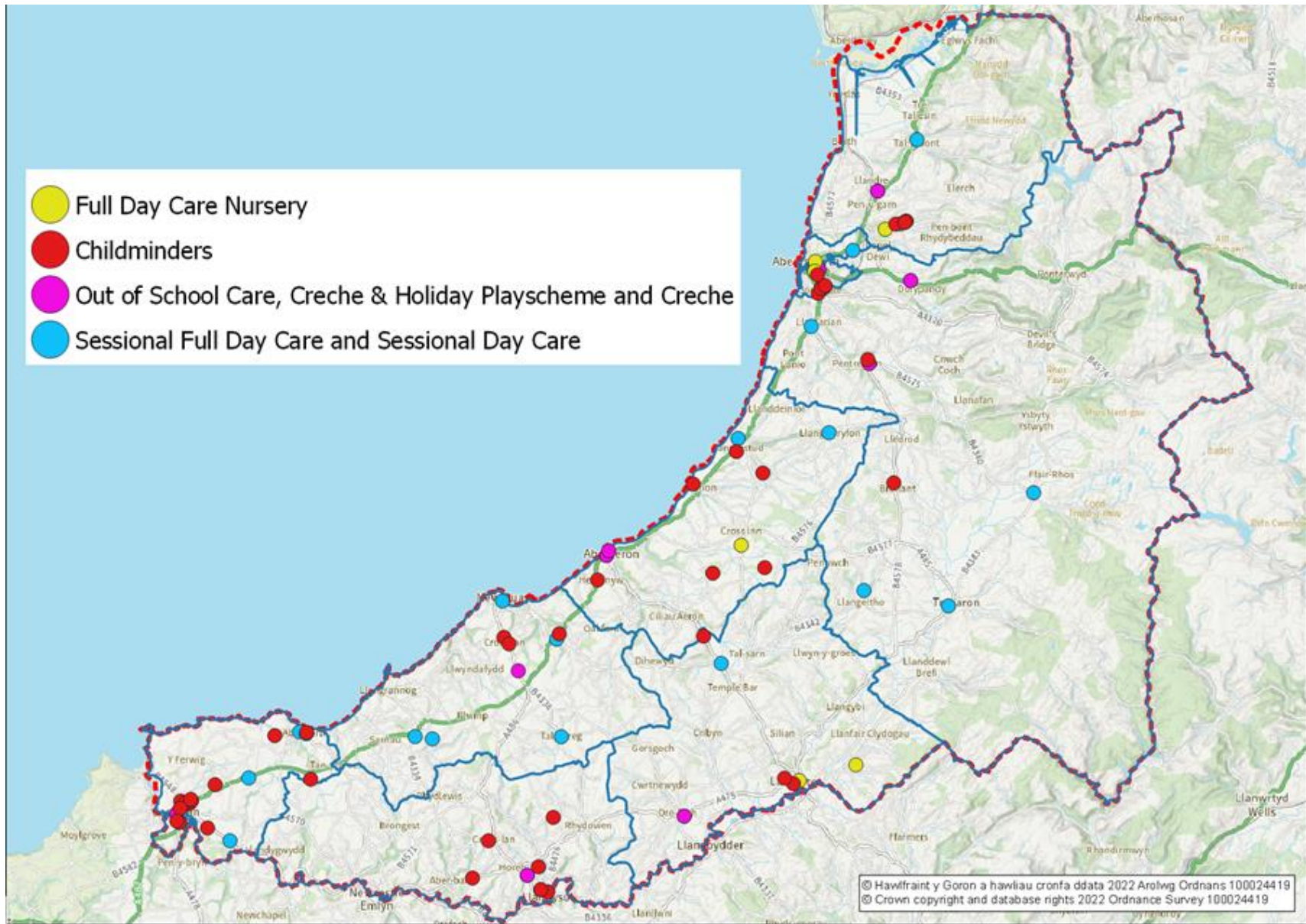


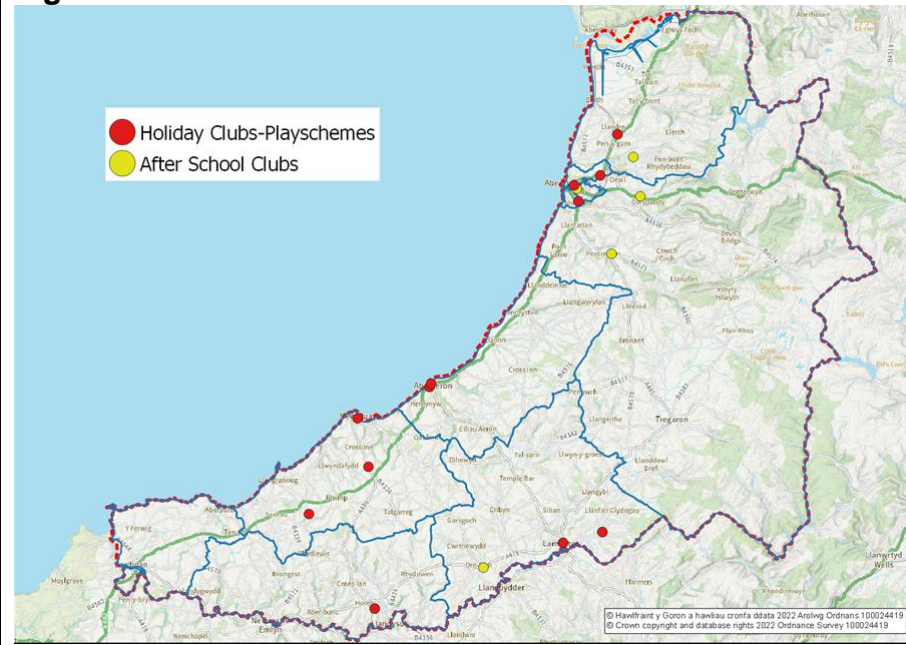


Figure 8.5: All registered Childcare Providers

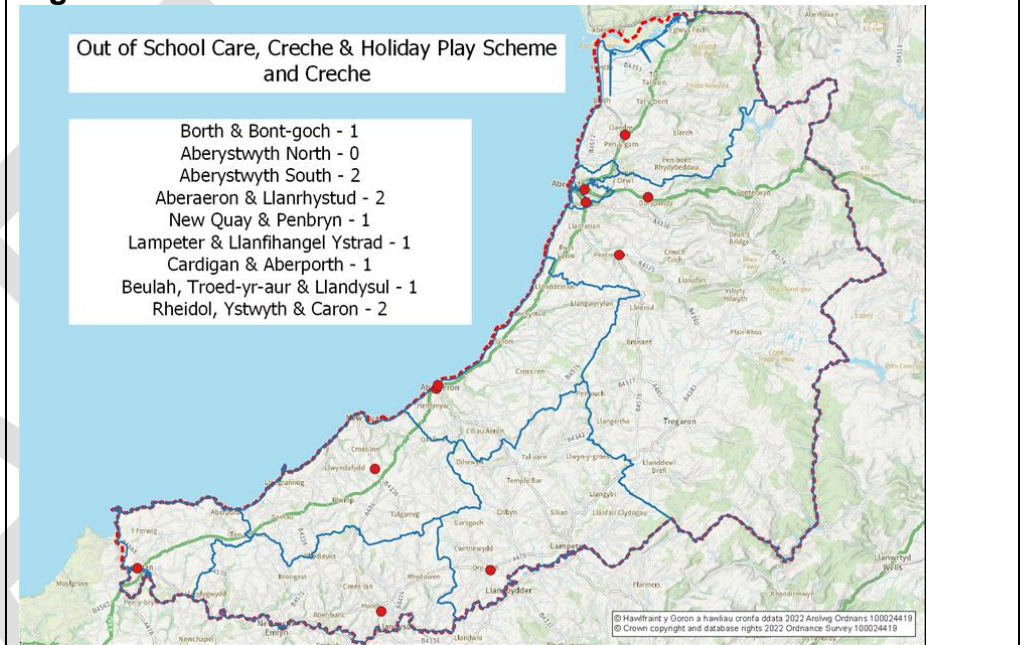


This first map highlights here there is After School and Holiday provision available in all types of Childcare:

**Figure 8.6:**



**Figure 8.7**



The second map shows the settings registered as 'Out of School' and the Crèche with Holiday Play Scheme that provides holiday playschemes on an 'ad-hoc' basis (not every school holiday week).

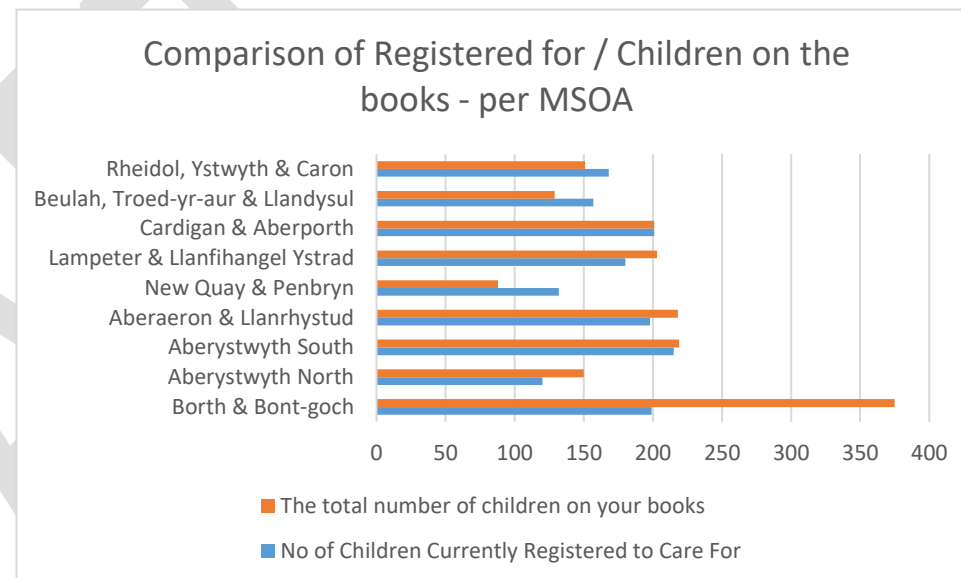


**NUMBER OF PLACES AVAILABLE:**

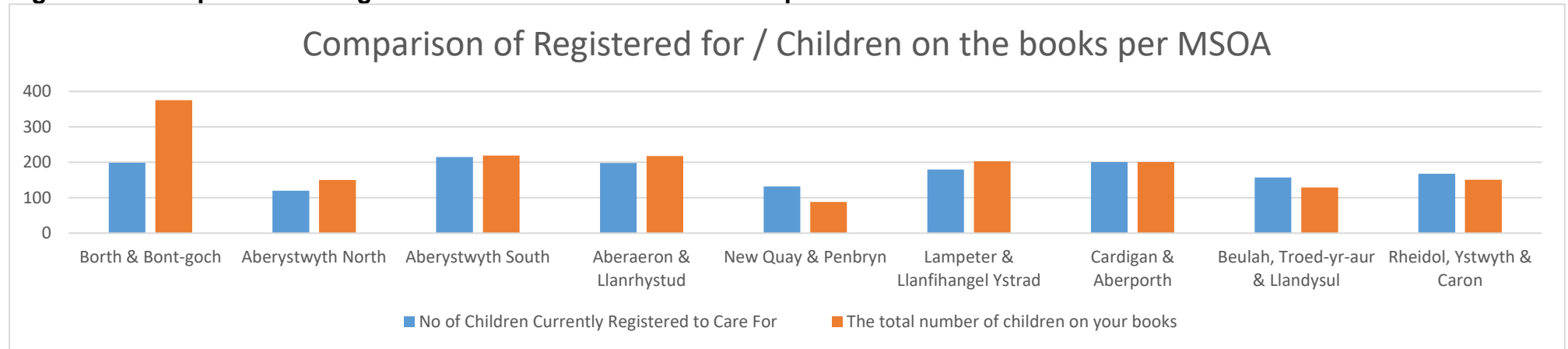
**Table 8.1: Number of places per MSOA:**

Number of places available:	No of Children Currently Registered to Care For	The total number of children on your books
Borth & Bont-goch	199	375
Aberystwyth North	120	150
Aberystwyth South	215	219
Aberaeron & Llanrhystud	198	218
New Quay & Penbryn	132	88
Lampeter & Llanfihangel Ystrad	180	203
Cardigan & Aberporth	201	201
Beulah, Troed-yr-aur & Llandysul	157	129
Rheidol, Ystwyth & Caron	168	151
<b>TOTAL</b>	<b>1570</b>	<b>1734</b>

**Figure 8.8: Number of places per MSOA**



**Figure 8.9: Comparison of Registered for / Children on the books per MSOA**



Below is the data to compare number of registered places per 1,000 population, and also per 1,000 populations of children aged 0-12.

**Table 8.2: Population and places per 1,000 population and per 1,000 population ages 0-12:**

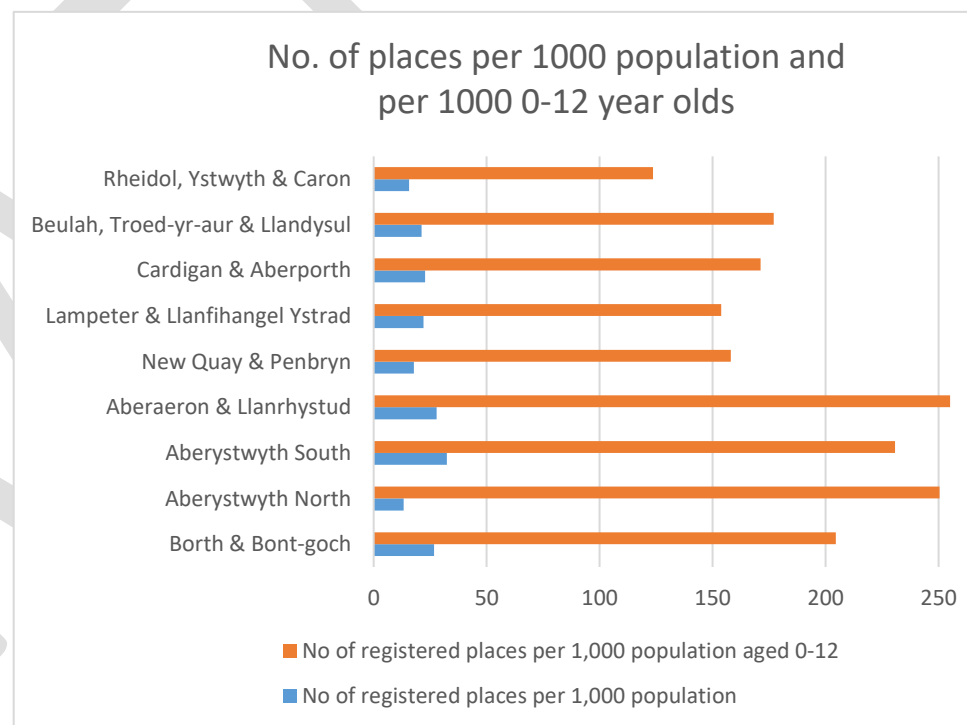
MSOA Name	Population All Ages	Number of registered places	No of registered places per 1,000 population	% of population	Population Aged 0-12	No of registered places per 1,000 population aged 0-12
Borth & Bont-goch	7,466	199	26.7	2.7	973	204.5
Aberystwyth North	9,001	120	13.3	1.3	479	250.5
Aberystwyth South	6,629	215	32.4	3.2	932	230.7
Aberaeron & Llanrhystud	7,113	198	27.8	2.8	776	255.2
New Quay & Penbryn	6,579	117	17.8	1.8	740	158.1
Lampeter & Llanfihangel Ystrad	8,191	180	22	2.2	1170	153.8
Cardigan & Aberporth	8,873	201	22.7	2.3	1174	171.2
Beulah, Troed-yr-aur & Llandysul	7,420	157	21.2	2.1	887	177
Rheidol, Ystwyth & Caron	11,623	183	15.7	1.6	1481	123.6
<i>Source: ONS Mid-Year Population Estimates, 2020.</i>	<b>72,895</b>	<b>1570</b>	<b>21.5</b>	<b>2.2</b>	<b>8612</b>	<b>182.3</b>

On further analysis, Lampeter which is on the border of Ceredigion and Carmarthenshire has two private Full Day Care Nurseries and Childminders servicing a large geographical area. However, Lampeter has fewer places per 1000 children aged 0-12 than some other areas, which may be linked to the increase in homes being built there over the last 5 years. Speech and language services have also identified Lampeter as an area where young children are not getting support – and also does not have a Sessional Childcare setting.

**Table 8.3: Places per 1,000 population and per 1,000 population ages 0-12:**

MSOA Name	No of registered places per 1,000 population	No of registered places per 1,000 population aged 0-12
Borth & Bont-goch	26.7	204.5
Aberystwyth North	13.3	250.5
Aberystwyth South	32.4	230.7
Aberaeron & Llanrhystud	27.8	255.2
New Quay & Penbryn	17.8	158.1
Lampeter & Llanfihangel Ystrad	22	153.8
Cardigan & Aberporth	22.7	171.2
Beulah, Troed-yr-aur & Llandysul	21.2	177
Rheidol, Ystwyth & Caron	15.7	123.6

**Figure 8.10: Places per 1,000 population and per 1,000 population ages 0-12:**



**Table 8.4: Registered Provision – Term Time**

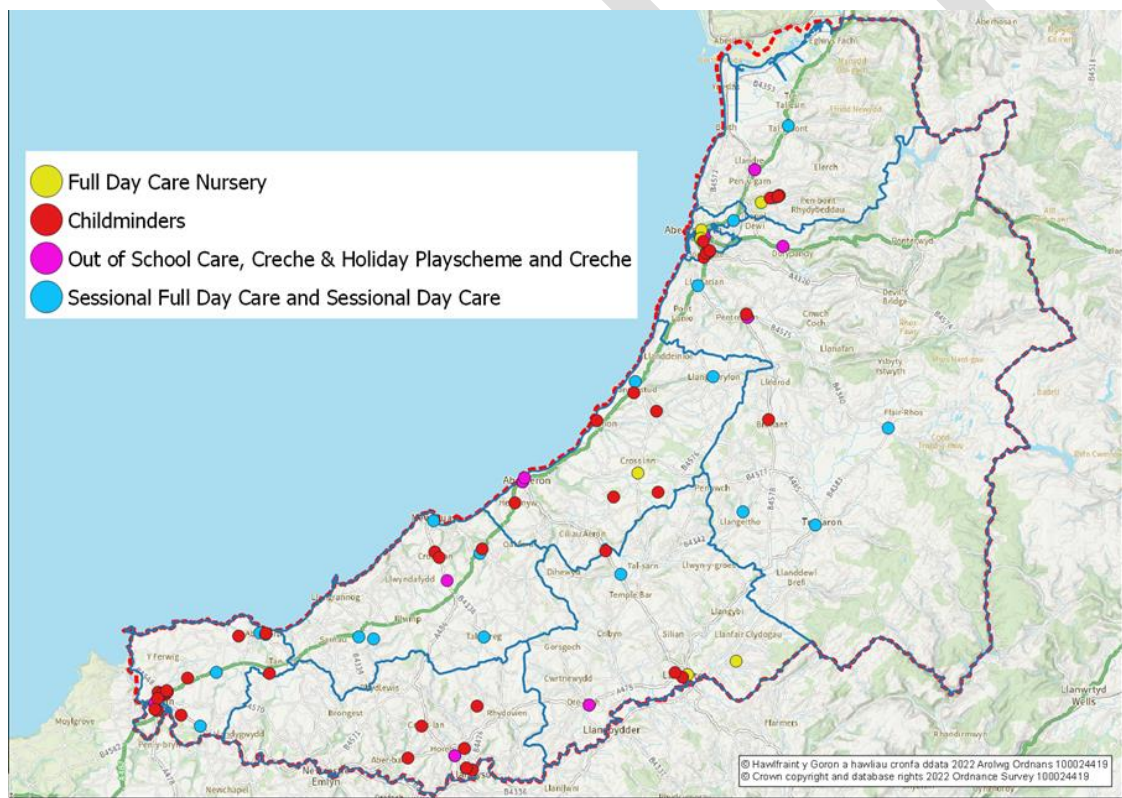
Childcare Type	Places as per registration	Term Time				
		Maximum Capacity of Childcare places available daily	Number of Children using service	Number of Vacancies	Number of children on Waiting List	Number of Childcare places required
Childminder	351	351	293	120	28	0
Day Care						
Full Day Nursery	306	306	437	59	26	0
Sessional Day Care	131	131	148	17	24	7
Sessional Full Day Care	456	456	512	1664	49	
Crèches	9	9				
Out of School Care	234	234303	303	60	12	
Open Access Play Provision	None recorded in Ceredigion					
Nanny	None recorded in Ceredigion					

**Table 8.5: Registered Provision – School Holidays**

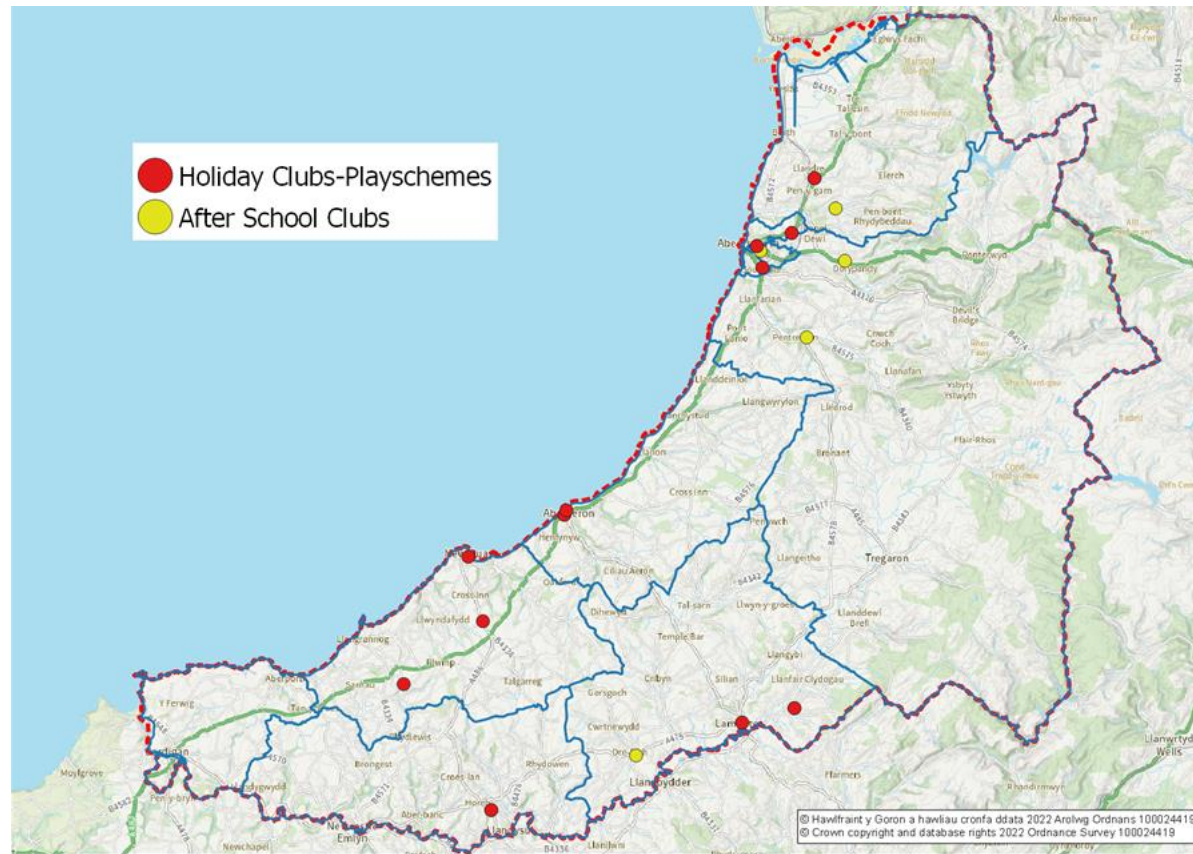
Childcare Type	Places as per registration	Term Time				
		Maximum Capacity of Childcare places available daily	Number of Children using service	Number of Vacancies	Number of children on Waiting List	Number of Childcare places required
Childminder	337	337	289	119	28	0
Day Care						
Full Day Nursery	306	306	437	59	26	0
Sessional Day Care	0					0
Sessional Full Day Care	39	39	77	206	6	0
Crèches	9	9				0

Out of School Care	142	142	225	4	12	8
Open Access Play Provision	None recorded in Ceredigion					
Nanny	None recorded in Ceredigion					

**Figure 8.11: Geographical Distribution of Childcare Places per Childcare Type – Supply and Demand – Term Time**



**Figure 8.12: Geographical Distribution of Childcare Places per Childcare Type – Supply and Demand – School Holidays**



**ACTION:** Investigate the possibility of establishing a Sessional Day Care provision for 2-3 year olds without impacting on the two Full Day Care Providers and Childminders in Lampeter.  
Further research into Childcare needs of families living in Lampeter and Llanfihangel Ystrad MSOA community.

## 8.1 VACANCIES

The SASS required settings to record the Childcare spaces they had within their setting as well as waiting list during the 4 weeks in June 2021. Settings had just reopened for the Summer Term and parent confidence was gradually growing with regard to sending children back to Childcare settings and return to working patterns.

Below are the results, which must be used with caution. The After School Clubs in particular were poorly attended in the reporting period, however, attendance and making use of these is slowly improving as the school year continues and restrictions ease.

**Table 8.1.1: Number of unfilled spaces for this part of the service:**

Childcare session: Unfilled spaces	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
Afternoons	0	0	0	0	0	0	0	0	0	0
After School	92	146	14	11	5	0	9	40	17	334
Before School	70	0	4	3	11	0	8	2	51	149
Crèche	0	0	0	0	0	0	0	0	0	0
Early Education Placement	5	12	1	0	2	0	13	35	1	69
Evenings Aft 6:00 p.m.	0	0	0	0	0	0	0	0	0	0
Full day care/Full Day Nursery	2	12	10	27	13	12	102	17	1	196
Half Day Care A.M.	0	13	4	2	2	9	8	2	3	43
Half Day Nursery P.M.	0	15	8	13	5	9	12	0	39	101
Lunch	250	47	5	1	4	8	12	41	46	414



Mornings	4	0	0	5	2	0	0	0	6	17
Overnight	0	0	0	0	0	0	0	0	0	0
Playgroup or Cylch Meithrin A.M.	156	25	0	0	3	10	5	12	25	236
Playgroup or Cylch Meithrin P.M.	267	48	0	0	9	8	0	35	17	384
Playscheme sessions	0	0	0	0	0	0	0	0	0	0
Weekends	0	0	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>846</b>	<b>318</b>	<b>46</b>	<b>62</b>	<b>56</b>	<b>56</b>	<b>169</b>	<b>184</b>	<b>206</b>	<b>1943</b>

**Table 8.1.2: Number of children on the waiting list for an immediate place:**

Childcare session: Waiting list	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
Afternoons	0	0	0	0	0	5	0	0	0	5
After School	12	0	0	0	0	0	0	1	0	13
Before School	0	0	0	0	0	0	0	0	0	0
Crèche	0	0	0	0	0	0	0	0	0	0
Early Education Placement	0	0	0	0	0	0	4	0	0	4
Evenings Aft 6:00 p.m.	0	0	0	0	0	0	0	0	0	0
Full day care/Full Day Nursery	0	5	2	15	0	4	6	5	5	42
Half Day Care A.M.	0	5	0	2	0	0	0	0	5	12
Half Day Nursery P.M.	0	4	0	1	0	0	0	0	5	10
Lunch	0	0	18	0	5	0	0	0	0	23
Mornings	0	0	0	0	1	9	10	0	0	20



Overnight	0	0	0	0	0	0	0	0	0	0	0
Playgroup or Cylch Meithrin A.M.	0	0	0	1	0	0	0	0	0	0	1
Playgroup or Cylch Meithrin P.M.	0	0	0	9	0	0	0	0	0	0	9
Playscheme sessions	0	0	0	0	0	0	0	0	0	0	0
Weekends	0	0	0	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>12</b>	<b>14</b>	<b>20</b>	<b>28</b>	<b>6</b>	<b>18</b>	<b>20</b>	<b>6</b>	<b>15</b>	<b>139</b>	

**Table 8.1.3: Number of unfilled spaces – the number of children on the waiting list for an immediate place per part of the service.**

Childcare session: Spaces compared to waiting list	Borth & Bontgoch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL available places
Afternoons	0	0	0	0	0	-5	0	0	0	-5
After School	80	146	14	11	5	0	9	39	17	321
Before School	70	0	4	3	11	0	8	2	51	149
Crèche	0	0	0	0	0	0	0	0	0	0
Early Education Placement	5	12	1	0	2	0	9	35	1	65
Evenings Aft 6:00 p.m.	0	0	0	0	0	0	0	0	0	0
Full day care/Full Day Nursery	2	7	8	12	13	8	96	12	-4	154
Half Day Care A.M.	0	8	4	0	2	9	8	2	-2	31
Half Day Nursery P.M.	0	11	8	12	5	9	12	0	34	91
Lunch	250	47	-13	1	-1	8	12	41	46	391

Mornings	4	0	0	5	1	-9	-10	0	6	<b>-3</b>
Overnight	0	0	0	0	0	0	0	0	0	<b>0</b>
Playgroup or Cylch Meithrin A.M.	156	25	0	-1	3	10	5	12	25	<b>235</b>
Playgroup or Cylch Meithrin P.M.	267	48	0	-9	9	8	0	35	17	<b>375</b>
Playscheme sessions	0	0	0	0	0	0	0	0	0	<b>0</b>
Weekends	0	0	0	0	0	0	0	0	0	<b>0</b>
<b>TOTAL</b>	<b>834</b>	<b>304</b>	<b>26</b>	<b>34</b>	<b>50</b>	<b>38</b>	<b>149</b>	<b>178</b>	<b>191</b>	<b>1804</b>

This was the situation as of June 2021 when some settings were not open, or just reopened and families had not returned to pre-pandemic use of Childcare patterns. The SASS form also allowed for double entry of sessions (e.g. morning and full day). Therefore, caution must be taken when determining the number of vacancies when comparing spaces available and waiting lists.

DRAFT

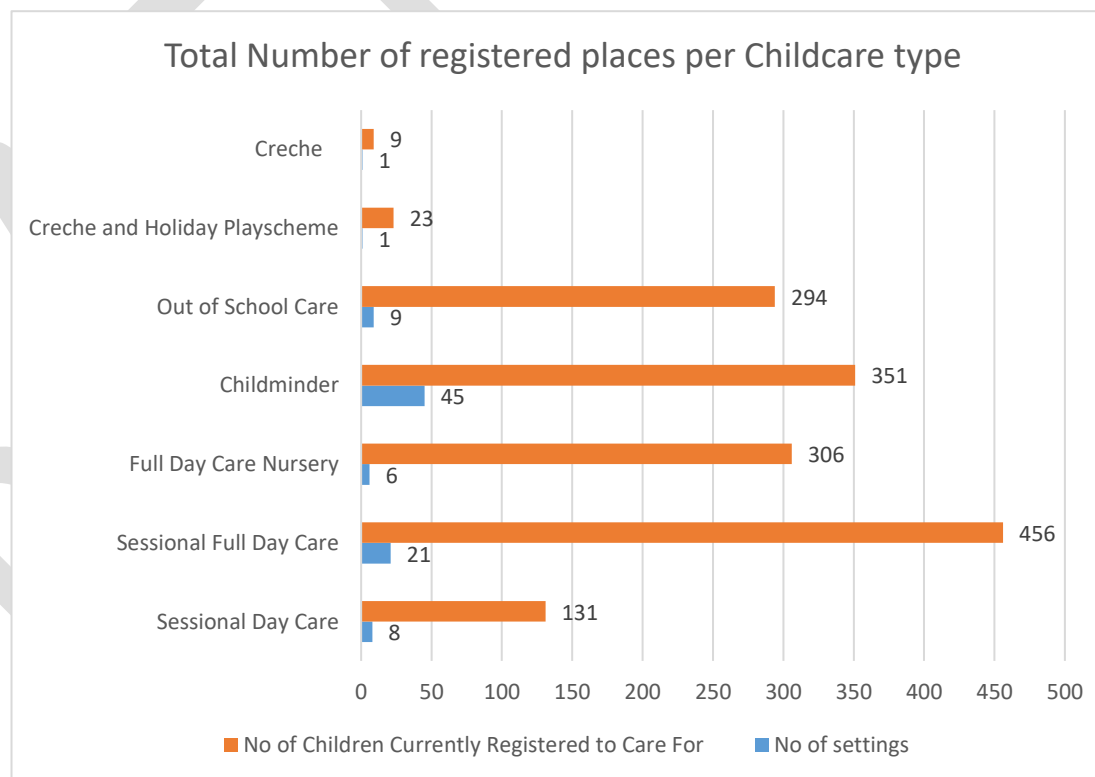
## 9 SUPPLY OF CHILDCARE

Ceredigion currently has 1,570 (December 2021) registered Childcare places available. This has dropped 375 places since the last CSA was undertaken when there were 1,945 places (March 2017).

**Table 9.1: Total Number of registered places per Childcare type**

	No of settings	No of Children Currently Registered to Care For
Sessional Day Care	8	131
Sessional Full Day Care	21	456
Full Day Care Nursery	6	306
Childminder	45	351
Out of School Care	9	294
Crèche and Holiday Playscheme	1	23
Crèche	1	9
<b>TOTAL</b>	<b>91</b>	<b>1570</b>

**Figure 9.1: Total Number of registered places per Childcare type**



Since our last CSA we have changed our reporting methodology on number of places for the full day care category. We previously reported on 8 full day care settings. However, 2 of them in fact only offered morning and afternoon sessions but, due to being open all day they had a full

day care registration with CIW. In moving forward and to ensure consistency in our reporting we are recording these two as full day care (sessional). These are in line with the Cylchoedd who have now increased opening hours as a result of the Childcare Offer. This did not distinguish them from Day Nurseries who were open full days for children from 0-12 (as outlined in the first paragraph of Section 7).

**Table 9.2: Number of registered places 2017 – 2021:**

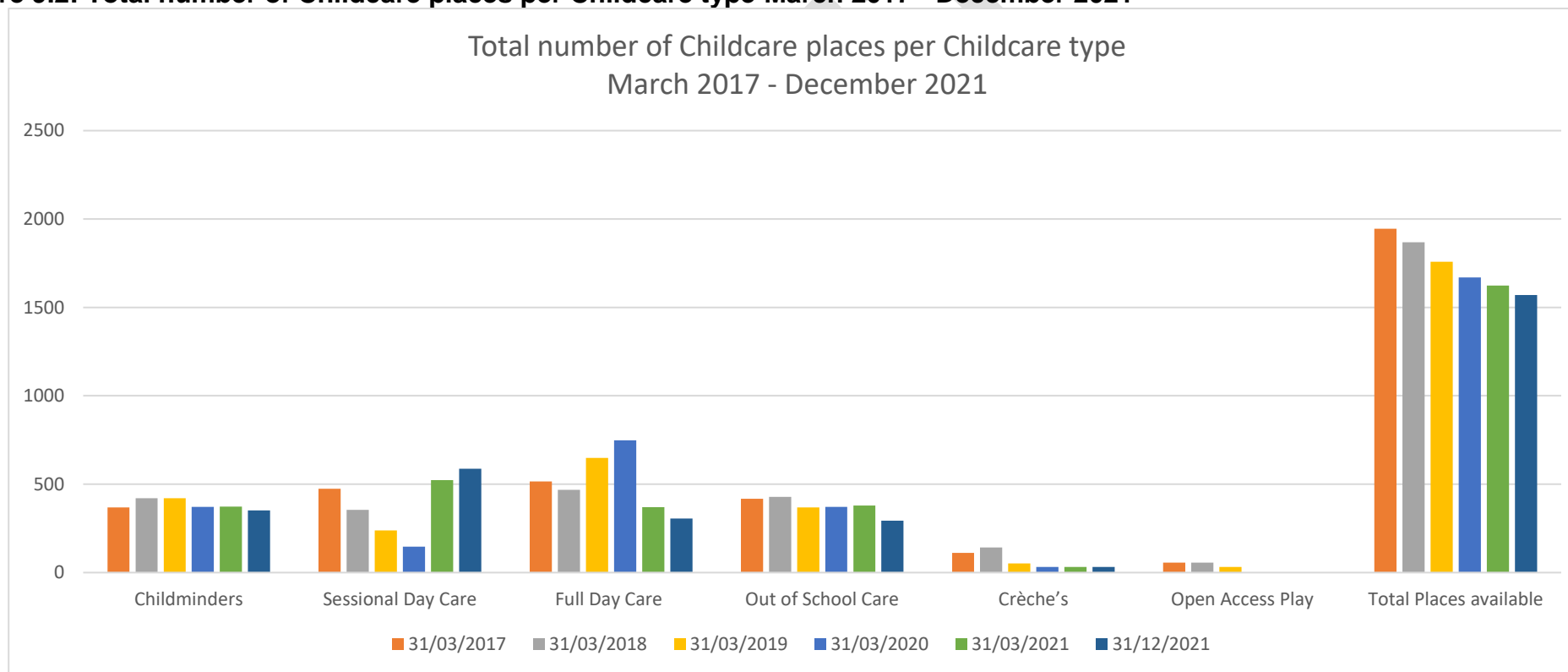
Total number of Childcare places	Childminders	Sessional Day Care	Full Day Care	Out of School Care	Crèche's	Open Access Play	Total Places available
31/03/2017	369	474	516	418	112	56	<b>1945</b>
31/03/2018	420	355	468	428	142	56	<b>1869</b>
31/03/2019	421	238	648	368	52	32	<b>1759</b>
31/03/2020	372	146	748	372	32	0	<b>1670</b>
31/03/2021	373	523	370	380	32	0	<b>1624</b>
31/12/2021	351	587	306	294	32	0	<b>1570</b>

Although the number of Childcare places has decreased by 375 places. The table above demonstrates where the biggest loss of places has been within the Crèche and Open Access Play category. Neither of these types of Childcare although registered with CIW did not offer Childcare which would enable parents to go out to work. The crèches were all registered by RAY Ceredigion to run alongside Flying Start parenting courses. These have all been de-registered as Flying Start have brought the Crèches in house and are not required to register as they operate for under 2 hours. There are no registered Open Access Play sessions in Ceredigion either therefore a loss of 56 places since the last assessment.

The Out of School figures include one registered provider of a Specialist Holiday Playscheme for children with additional needs, who deliver their services from two locations to support families in the North and South of the county.

The number of Childminders has remained fairly stable over the last couple years and throughout the pandemic, with new Childminders filling the space of de-registered childminders (but not necessarily in the same locations). However, since 2017 numbers have decreased from an average of 55 to 45 in 2021. There is a large cohort of Childminders who have been providing a service to Ceredigion families for many years, and we continue to recruit and encourage new individuals to undergo training and registration in a rewarding, stable self-employed industry. Due to the rurality of Ceredigion we rely more on having childminders available across the county to provide the care as this is more sustainable compared to opening full day care provision.

**Figure 9.2: Total number of Childcare places per Childcare type March 2017 - December 2021**



With the introduction of the Childcare Offer, there has been an increase in 'Full Day Care' in the form of sessional settings registering as Full Day Care as seen in the graph in 31/03/2020. This shows the spike for that period in Full Day Care registrations, and that we historically reported on 8 Day Care Nurseries. Since the last CSA, a Full Day Care Nursery opened and also closed in an area previously identified as an area of need.

There is one new Cylch Meithrin undergoing registration with CIW for 19 places in a newly built unit funded by the Childcare Offer Capital grant funding. Work is also underway to investigate the possibility of re-opening two new after school clubs which closed during the pandemic due to lack of committee members to manage the provision. The two new clubs will be run by Mudiad Meithrin through the Flying Start registration.

Due to the provision of a larger new Flying Start building to replace a cabin (funded by Flying Start and the Childcare Offer Capital Grant) there is potential to increase the setting from 19 registered places in the future.

We do not hold the information on number of places in all unregistered After School Clubs.

The SASS asked providers to record whether they accepted Tax Free Childcare or Childcare Vouchers, and not the detail on the number of places where these could be used, therefore is not reported here. Further details on financial support for parents can be found in Section 18.

**Table 9.3: Number of providers who accept tax free Childcare or Childcare vouchers**

Number of providers who accept tax free Childcare or Childcare vouchers	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
Sessional Day Care				1	1	1	2		1	6
Sessional Full Day Care	2	2	2		3	1	2	1	4	17
Full Day Care Nursery	1	1	1	1		2				6
Childminder	4		5	5	1	2	6	4	2	29
Out of School Care	1		1	1		1			1	5
Crèche and Holiday Playscheme				0						0
Crèche							0			0
<b>TOTAL</b>	<b>8</b>	<b>3</b>	<b>9</b>	<b>8</b>	<b>5</b>	<b>7</b>	<b>10</b>	<b>5</b>	<b>8</b>	<b>63</b>

## LANGUAGE PROVISION

CIW changed the way to record language provision from 4 categories: *Welsh; Welsh and English; English with some bilingual element; English*; to 3 categories which are now: *Welsh; Both; or English*.

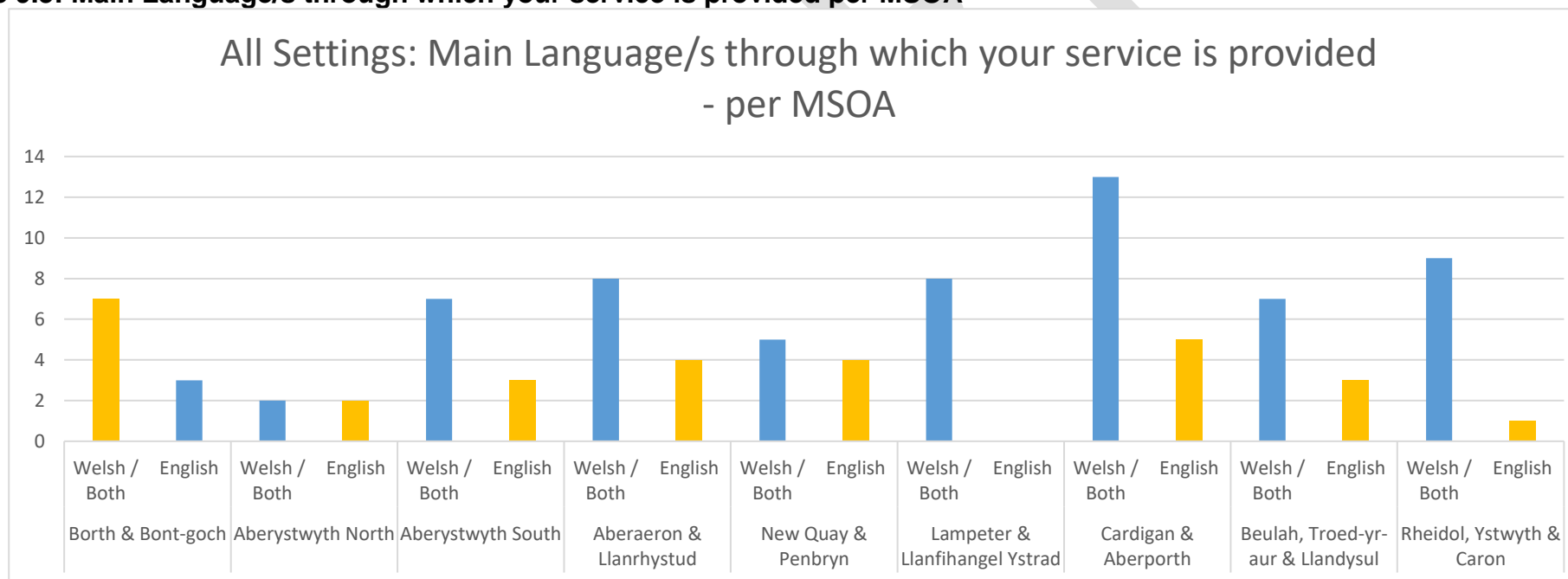
The Childminders and Day Nurseries as private providers advertise their services as being delivered in both languages to be inclusive to all families. 1 childminder also noted offering Sign Language in their language provision.

**Table 9.4: Main Language/s through which your service is provided**

Main Language/s through which your service is provided	Borth & Bont-goch		Aberystwyth North		Aberystwyth South		Aberaeron & Llanrhystud		New Quay & Penbryn		Lampeter & Llanfihangel Ystrad		Cardigan & Aberporth		Beulah, Troed-yr-aur & Llandysul		Rheidol, Ystwyth & Caron		TOTAL
	Welsh / Both	English	Welsh / Both	English	Welsh / Both	English	Welsh / Both	English	Welsh / Both	English	Welsh / Both	English	Welsh / Both	English	Welsh / Both	English	Welsh / Both	English	
Sessional Day Care	1						2		1		1		2				1		8
Sessional Full Day Care	2		1	1	2		1		3	1	1		3		1		5		21
Full Day Care Nursery	1		1	1			1				2								6
Childminder	2	3			3	3	2	4		3	3		7	5	5	3	1	1	45

Out of School Care	1				2		1		1		1				1		2		9
Crèche and Holiday Playscheme							1												1
Crèche												1							1
<b>TOTAL</b>	<b>7</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>7</b>	<b>3</b>	<b>8</b>	<b>4</b>	<b>5</b>	<b>4</b>	<b>8</b>	<b>0</b>	<b>13</b>	<b>5</b>	<b>7</b>	<b>3</b>	<b>9</b>	<b>1</b>	<b>91</b>

**Figure 9.3: Main Language/s through which your service is provided per MSOA**



- From a total 345 staff only 41 spoke little or no Welsh (17%).



<b>Table 9.5: Staff Language Staff's ability to speak Welsh</b>	<b>Number of settings</b>	<b>How many staff are fluent in Welsh?</b>	<b>How many staff can speak a fair amount of Welsh?</b>	<b>How many staff can speak little or no Welsh?</b>
Sessional Day Care	8	25	7	0
Sessional Full Day Care	21	85	24	6
Full Day Care Nursery	6	69	17	25
Childminder	45	19	10	8
Out of School Care	9	33	5	2
Crèche and Holiday Playscheme	1	3	2	0
Crèche	1	3	2	0
<b>TOTAL</b>	<b>91</b>	<b>237</b>	<b>67</b>	<b>41</b>

#### **OPENING TIMES:**

Each setting sets its own start and end time – depending on the service provided. Some Sessional Day Care and Sessional Full Day Care provide a 'breakfast club provision from 8.30, but most open at 9.00am. End times are 12:00pm if morning only, or 15:15 if providing two sessions or 'full day care'. Full Day Care Nurseries and Childminders are generally open from 8.00am until 18:00.

The most common start and end times are listed below for each type of setting

**Table 9.6: Opening Times**

<b>Type of care</b>	<b>TOTAL No. providers</b>	<b>Type of care</b>	<b>Start Time</b>	<b>End time</b>	<b>AVERAGE HOURS OPEN DAILY</b>
<b>Sessional Day Care</b>	8	Term Time Only	09:00	12:00 or 15:15	3:50
<b>Sessional Full Day Care</b>	18	Term Time Only	08:30	15:15	6:00
<b>Sessional Full Day Care</b>	3	Term time and holidays	09:00	17:00	8:00
<b>Full Day Care Nursery</b>	6	Term time and holidays	08:00	18:00	10:00

<b>Childminder</b>	1	Term Time only	08:00	16:00	8:00
<b>Childminder</b>	1	Term Time only / After school	15:00	17:00	2:00
<b>Childminder</b>	43	Term time and holidays	08:00	17:30	9:00
<b>Out of School Care</b>	5	Term Time Only	15:30	18:00	2:30
<b>Out of School Care</b>	2	Term time and holidays	15:20	17:45	2:30 hours ASC & 9:00 hours Holidays
<b>Out of School Care</b>	2	Holidays only	09:30	15:30	6:00
<b>Crèche and Holiday Playscheme</b>	1	Term Time and Holidays	08:30	17:30	9:00
<b>Crèche</b>	1	Term time only	09:30	13:30	4:00

Most Sessional Day Care, Sessional Full Day Care, and Out of School Clubs are open at least 3 days a week – up to 5 days a week Full Day Care Nurseries are open 5 days a week, and Childminder days vary from 2 to 7 days a week.

Parents must check the **Family Information Service** to contact the Childcare provider directly for their opening times and days.

No provider offers overnight care. Only 3 childminders offer Saturday care and one Sunday care. There is insufficient demand for Childcare in Ceredigion outside of the typical hours.

**Table 9.7: Average Daily Hours:**

		<b>AVERAGE HOURS OPEN DAILY</b>	<b>Monda y</b>	<b>Tuesda y</b>	<b>Wednesda y</b>	<b>Thursda y</b>	<b>Frida y</b>	<b>Saturda y</b>	<b>Sunda y</b>	<b>Overnigh t care</b>
Sessional Day Care	Term Time Only	03:50	7	8	8	8	7	0	0	no
Sessional Full Day Care	Term Time Only	06:00	17	18	18	18	16	0	0	no

Sessional Full Day Care	Term time and holidays	08:00	2	2	2	2	2	0	0	no
Full Day Care Nursery	Term time and holidays	10:00	6	6	6	6	6	0	0	no
Childminder	Term Time only	08:00	1	1	1	0	0	0	0	no
Childminder	Term Time only / After school	02:00	1	1	1	1	1	0	0	no
Childminder	Term time and holidays	09:00	34	40	42	40	32	3	1	no
Out of School Care	Term Time Only	02:30	3	3	4	4	1	0	0	no
Out of School Care	Term time and holidays	02:20	2	2	2	2	2	0	0	no
Out of School Care holiday hours	Term time and holidays	09:00								
Out of School Care	Holidays only	06:00								
Crèche and Holiday Playscheme	Term Time and Holidays	09:00	1	1	1	1	1	0	0	no
Crèche	Term time only	04:00	0	0	1	0	0	0	0	

**FEES:**

Fees charged fluctuate between each setting. Some are hourly, or by session / day. The average was calculated from all providers: The information below is all based on the SASS from June 2021. However, many providers are reporting that they will be increasing their fees in April due to the increase in staff wages, NI contribution and pension cost.

**Table 9.8: Average Fees charged per age:**

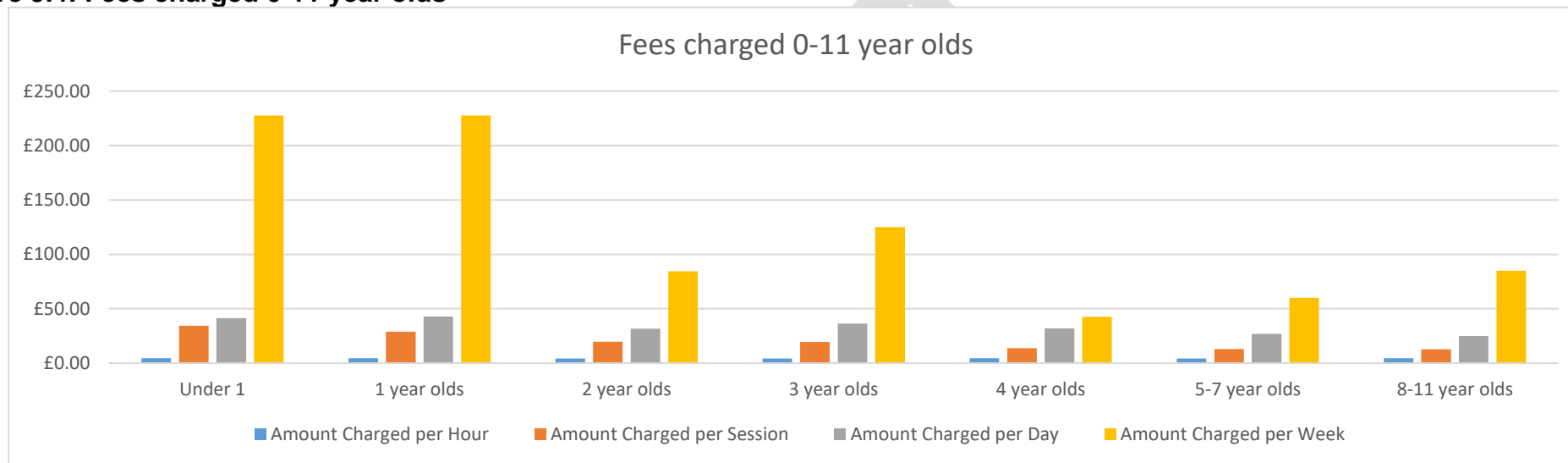
<b>Fees charged</b>	<b>Amount Charged per Hour</b>	<b>Amount Charged per Session</b>	<b>Amount Charged per Day</b>	<b>Amount Charged per Week</b>
Under 1	£4.40	£34.35	£41.40	£227.50
1 year olds	£4.49	£28.86	£42.88	£227.50
2 year olds	£4.16	£19.67	£31.58	£84.50
3 year olds	£4.25	£19.52	£36.36	£125.00
4 year olds	£4.45	£13.64	£31.87	£42.50
5-7 year olds	£4.25	£12.92	£26.88	£60.00
8-11 year olds	£4.41	£12.85	£24.88	£85.00
<b>AVERAGE 0-11 year olds</b>	<b>4.34</b>	<b>20.26</b>	<b>33.69</b>	<b>121.71</b>

**Table 9.9: Fees charged per age group**

	<b>2 year olds</b>		<b>3 year olds</b>		<b>4 year olds</b>	
<b>Range of fees charged by settings</b>	<b>Amount Charged per Session</b>	<b>Amount Charged per Day</b>	<b>Amount Charged per Session</b>	<b>Amount Charged per Day</b>	<b>Amount Charged per Session</b>	<b>Amount Charged per Day</b>
Sessional Day Care	£6.50 - £34.50	£10.00 - £25.00	£4.00 - £24.50	£3.50	£7.00 - £24.50	£3.50
Sessional Full Day Care	£5.00 - £16.00	£20.00 - £32.50	£1.00 - £16.00	£14.25 - £32.50	£1.00 - £16.00	£19.50 - £32.50
Full Day Care Nursery	£27.00 - £45.50	£37.00 - £51.75	£25.25 - £45.50	£45.00 - £51.75	£12.00 - £45.00	£12.00 - £51.75
Childminder	£22.50	£32.00 - £45.00	£20.00 - £22.50	£32.00 - £45.00	£10.00	£32.00 - £36.00
Out of School Care					£6.50 - £14.00	£28.00

Crèche and Holiday Playscheme			£12.50		£12.50	
Crèche						

**Figure 9.4: Fees charged 0-11 year olds**



**Table 9.10: Fees charged per Provider type: Sessional:**

Sessional Day Care					Sessional Full Day Care				
Fees charged	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Fees charged	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week
Under 1	£0.00				Under 1				

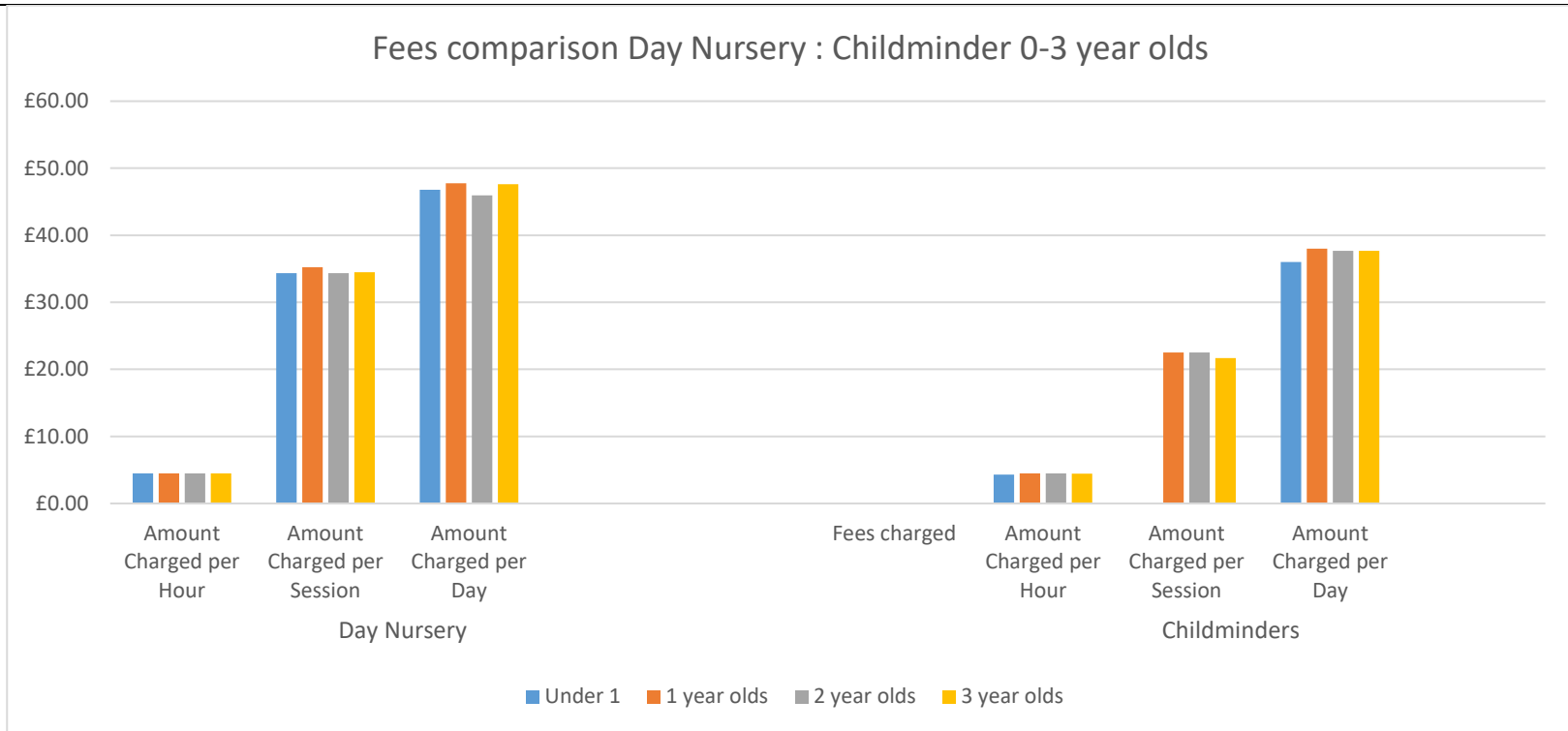
1 year olds	£0.00					1 year olds					
2 year olds		£12.29	£17.50	£16.00		2 year olds	£3.50	£9.54	£25.19	£10.00	
3 year olds						3 year olds	£3.83	£9.43	£23.81	£22.50	
4 year olds						4 year olds					
5-7 year olds						5-7 year olds					
8-11 year olds						8-11 year olds					
<b>AVERAGE 0-3 year olds</b>	<b>£0.00</b>	<b>£12.29</b>	<b>£17.50</b>	<b>£16.00</b>		<b>AVERAGE 0-3 year olds</b>	<b>£3.90</b>	<b>£9.92</b>	<b>£24.48</b>	<b>£19.17</b>	
4 year olds						4 year olds	£4.26	£9.64	£26.40	£25.00	
5-7 year olds						5-7 year olds	£4.00	£12.50	£25.00		
8-11 year olds						8-11 year olds		£8.50	£22.00		
<b>AVERAGE 0-11 year olds</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.00</b>		<b>AVERAGE - 4-11 year olds</b>	<b>£4.13</b>	<b>£10.21</b>	<b>£24.47</b>	<b>£25.00</b>	

**Table 9.11: Fees charged per Provider type: Full Day Care Nursery/Childminder:**

Full Day Care Nursery					Childminder				
Fees charged	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Fees charged	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week
<b>Under 1</b>	£4.50	£34.35	£46.79	£227.50	<b>Under 1</b>	£4.30		£36.00	
<b>1 year olds</b>	£4.50	£35.22	£47.75	£227.50	<b>1 year olds</b>	£4.47	£22.50	£38.00	

<b>2 year olds</b>	£4.50	£34.35	£45.96	£227.50		<b>2 year olds</b>	£4.49	£22.50	£37.67	
<b>3 year olds</b>	£4.50	£34.47	£47.60	£227.50		<b>3 year olds</b>	£4.43	£21.67	£37.67	
<b>4 year olds</b>						<b>4 year olds</b>	£4.58	£10.00	£34.00	
<b>5-7 year olds</b>										
<b>8-11 year olds</b>										
<b>AVERAGE 0-3 year olds</b>	<b>£4.50</b>	<b>£34.60</b>	<b>£47.03</b>	<b>£227.50</b>		<b>AVERAGE 0-3 year olds</b>	<b>£4.45</b>	<b>£19.17</b>	<b>£36.67</b>	<b>£0.00</b>
<b>4 year olds</b>	£4.50	£27.32	£39.06	£60.00		<b>4 year olds</b>	£4.58	£10.00	£34.00	
<b>5-7 year olds</b>		£12.00	£12.00	£60.00		<b>5-7 year olds</b>	£4.49	£18.83	£42.50	
<b>8-11 year olds</b>		£12.00	£12.00	£60.00		<b>8-11 year olds</b>	£4.41	£22.50	£37.50	£110.00
<b>AVERAGE - 4-11 year olds</b>	<b>£4.50</b>	<b>£17.11</b>	<b>£21.02</b>	<b>£60.00</b>		<b>12-14 year olds</b>	£4.25	£22.50	£45.00	
						<b>15-17 year olds</b>	£9.50			
						<b>AVERAGE - 4-17 year olds</b>	<b>£5.45</b>	<b>£18.46</b>	<b>£39.75</b>	<b>£110.00</b>

**Figure 9.5: Fees comparison Day Nursery : Childminder 0-3 year olds**



**Table 9.12: Fees charged per Provider type: Out of School / Crèche and Holiday Playscheme**

Out of School Care					Crèche and Holiday Playscheme				
	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Fees charged	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week
Fees charged					Sessional Day Care				
<b>Under 1</b>					<b>Under 1</b>				
<b>1 year olds</b>					<b>1 year olds</b>				



<b>2 year olds</b>						<b>2 year olds</b>				
<b>3 year olds</b>						<b>3 year olds</b>		£12.50		
<b>4 year olds</b>		£8.75	£28.00			<b>4 year olds</b>		£12.50		
<b>5-7 year olds</b>		£8.75	£28.00			<b>5-7 year olds</b>		£12.50		
<b>8-11 year olds</b>		£8.75	£28.00			<b>8-11 year olds</b>		£12.50		
<b>AVERAGE 4 - 11 year olds</b>	<b>£0.00</b>	<b>£8.75</b>	<b>£28.00</b>	<b>£0.00</b>		<b>AVERAGE 3-11 year olds</b>	<b>£0.00</b>	<b>£12.50</b>	<b>£0.00</b>	<b>£0.00</b>

**ADDITIONAL LEARNING NEEDS (ALN)** (See SECTION 6 for ALN data)

**Places for Additional Learning Needs/Special Educational Needs or require specialist care due to a disability**

Sessional and Full Day care settings understand about the referral system to Cynllun Cyfeirio. All Childcare providers have received information and access to training about the Additional Learning Needs Code. Bespoke training modules were developed and delivered virtually by the Early Years Additional Learning Needs Lead Officer. Topics covered included Emerging Needs and How to Write a 1 Page Profile, and parity of training across the sector is intended to provide a consistent approach to identifying emerging and additional needs and tailoring provision for these needs. Childminders have provided positive feedback and are grateful for the opportunity to access the same training opportunities as others in the sector.

**Table 9.13: Number of children with learning difficulties or disabilities:**

<b>Additional Learning Needs/Special Educational Needs</b>	<b>Total no. of children (of all ages) formally identified as having learning difficulties or disabilities</b>
Sessional Day Care	21
Sessional Full Day Care	47

Full Day Care Nursery	8
Childminder	5
Out of School Care	20
Crèche and Holiday Playscheme	0
Crèche	0
<b>TOTAL</b>	<b>101</b>

### **Financial support for settings who have children with Additional Learning Needs (ALN)**

Early Years ALN Processes have been developed to meet the requirements of the ALN Code. All Early Years practitioners are aware of their responsibilities in line with the Code. Training and resources have been provided to all practitioners and settings. Person Centred Practice (PCP) and review meetings are established with families and children being at the centre of the process.

Pre-school children attending non-maintained settings identified as requiring additional help can access up to 10 hours additional support through the helping hands referral scheme called **Cynllun Cyfeirio**. This is dependent on the child's needs, and can fund additional staff and resources to implement early intervention strategies such as Speech and Language support. This scheme is funded by Flying Start, Families First, Social Care and Schools Services.

A multi-agency panel meets (including representatives from the funders plus Hywel Dda University Health Board, Team Around the Family, Mudiad Meithrin and a parent) to discuss referrals to the scheme each half term. The agencies involved in the Scheme work together to support the requirements of the ALN code.

However, the Referral Scheme is only available for children 2-4 years of age during term time. There is no financial support for children below aged 2 and during the holidays. With more and more children being identified with speech and language issues this is putting more of a demand for support whilst services are being pushed to make budget cuts.

In order to ensure that the appropriate staff are trained to provide the additional support staff in the settings are receiving the Elklan training to support the children in the setting. The 1:1 support staff can then support the other children whilst the trained staff can provide the specialist support. This has cut down on the need to train the high turnover of 1:1 staff with Elklan. This has proved to be more cost effective.

Out of School care settings who care for School aged children with additional needs can access additional support for through the Ymuno Scheme which is administered by a third sector organisation called DASH. The support is funded by the Childcare and Play Programme within the Welsh Government Children and Communities Grant.

This support is however capped at 200 hours per child per year. Once the child reaches the 200 hour threshold, the family or setting needs to cover the costs of the 1:1 support staff. Due to the funding cuts and increase in national minimum wages and on-costs, the support offered by DASH has meant that they can only pay £8.25 per hour in 2021-2022 (up from £7.00 in 2017). This means that the support does not meet the minimum wage requirement. Settings are therefore required to make up the shortfall to cover staff wages. This again impacts the sustainability of a setting.

Additionally, recruitment of support staff / helping hands is an issue for settings:

Feedback from Provider Consultation

*“Usually a child with additional needs only gets a maximum of 10 hrs help by a one-to-one. This proves difficult when trying to employ a person, as 10hrs work a week isn't enough to cover bills/Childcare etc. Also, this usually isn't enough hours for that child. If said child attends more than 10hrs a week (which is usually the case) then that child doesn't receive enough one-to-one support. If said child attends 15hrs a week, that leaves 5 hrs a week unsupported.”*

**Table 9.14: Number receiving Cynllun Cyfeirio Support 2018-2021:**

Year	Number receiving Cynllun Cyfeirio support
2018	131
2019	130
2020	102
2021	155
2022	Not yet available

**ACTION: Monitor the funding of provision against number of children requiring additional support in Childcare settings.**

For Information and data on the number of children with disabilities see Section 6 (Population):

## Number of children with ALN or awaiting formal assessment who have Special Educational Needs (SEN) or Disability – Geographical Distribution

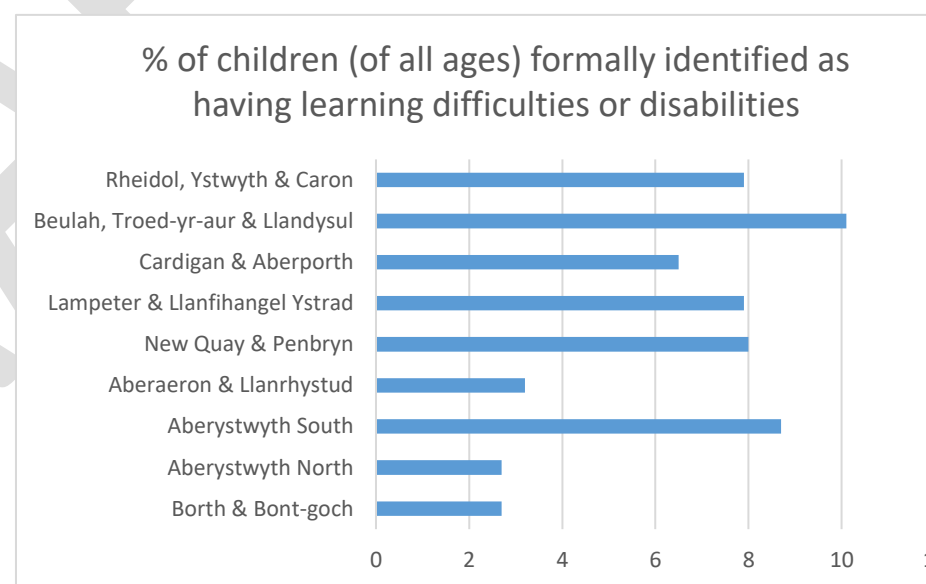
Settings reported that 101 children (of all ages) were formally identified as having learning difficulties or disabilities. The table has not been included for the 9 Middle Super Output Areas due to the very low numbers, and some children within settings may be identifiable. Types of ALN needs (Cognitive; Behaviour; Communication; Sensory or Physical) have also not been analysed per MSOA due to the low numbers.

However, the percentage of ALN children compared to the registers of the settings per MSOA was calculated below:

**Table 9.15: Percentage of children with learning difficulties or disabilities per MSOA**

	<b>% of children (of all ages) formally identified as having learning difficulties or disabilities</b>
Borth & Bont-goch	2.7
Aberystwyth North	2.7
Aberystwyth South	8.7
Aberaeron & Llanrhystud	3.2
New Quay & Penbryn	8
Lampeter & Llanfihangel Ystrad	7.9
Cardigan & Aberporth	6.5

**Figure 9.6: Percentage of children with learning difficulties or disabilities per MSOA**



\*Aberystwyth South hosts the Specialist Holiday Playscheme for all North of county in this figure therefore not representative of the ALN needs of the area.

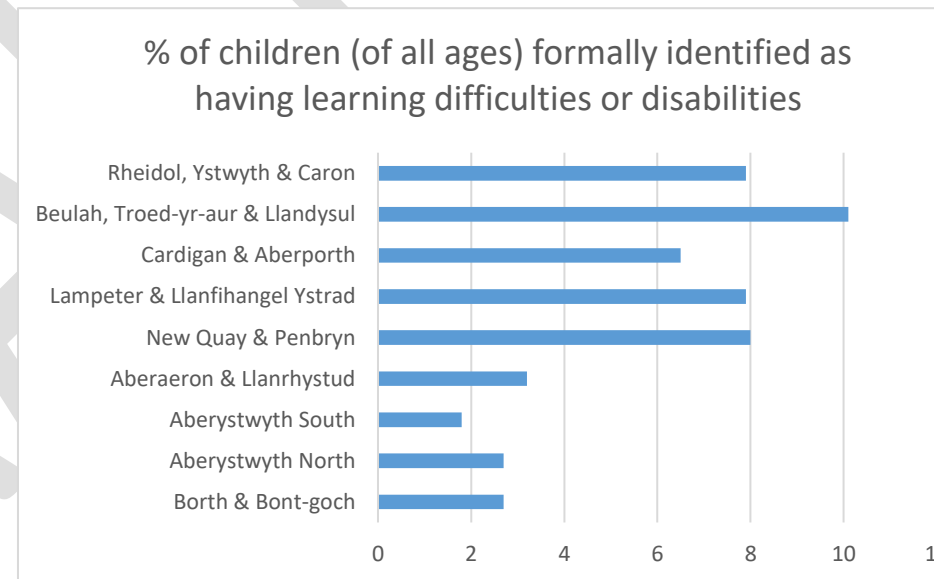
Beulah, Troed-yr-aur & Llandysul	10.1
Rheidol, Ystwyth & Caron	7.9

Figures amended to exclude Specialist Holiday Playscheme

**Table 9.16: Percentage of children with learning difficulties or disabilities per MSOA - exclude Specialist Holiday Playscheme**

Without Specialist Holiday Playscheme data:	% of children (of all ages) formally identified as having learning difficulties or disabilities
Borth & Bont-goch	2.7
Aberystwyth North	2.7
Aberystwyth South	1.8
Aberaeron & Llanrhystud	3.2
New Quay & Penbryn	8
Lampeter & Llanfihangel Ystrad	7.9
Cardigan & Aberporth	6.5
Beulah, Troed-yr-aur & Llandysul	10.1

**Figure 9.7: Percentage of children with learning difficulties or disabilities per MSOA - exclude Specialist Holiday Playscheme**



### Number of children with special educational needs or a disability in schools

In 2020 – 2021 the Pupil Level Annual School Census (PLASC) showed that there were 2433 school aged pupils in Ceredigion with Special Educational Needs with the figures decreasing since last the CSA.

The Childcare and Play programme funds extra 'Ymuno' support to enable children with additional needs to attend After School provision. In Ceredigion children do not receive 1:1 support in schools, but the Ymuno fund could fund additional support – either additional staff or resources to enable the child to attend mainstream Childcare provision.

Two of the After School Clubs that received Ymuno support for children in their care have not re-opened since the pandemic restrictions were lifted, and therefore there is no demand for this funding. This is a concern that has been discussed with the contracted organisation DASH who manage the service on Ceredigion County Council's behalf and the Childcare Unit.

**ACTION: Investigate demand for Ymuno support in key locations and address service provision.**

**Table 9.17: Number of school pupils with special additional needs 2015-2021**

Year	Number of pupils with special additional needs
2015 - 2016	2739
2016 - 2017	2,765
2017 - 2018	2,705
2018 - 2019	2,661
2019 - 2020	2,617
2020 - 2021	2,433

	2021 - 2022	Not available as yet	
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## 9.1 CHILDMINDERS

**Full analysis of childminder data is available above in the Overview Section.**

### **Childminder Vacancies**

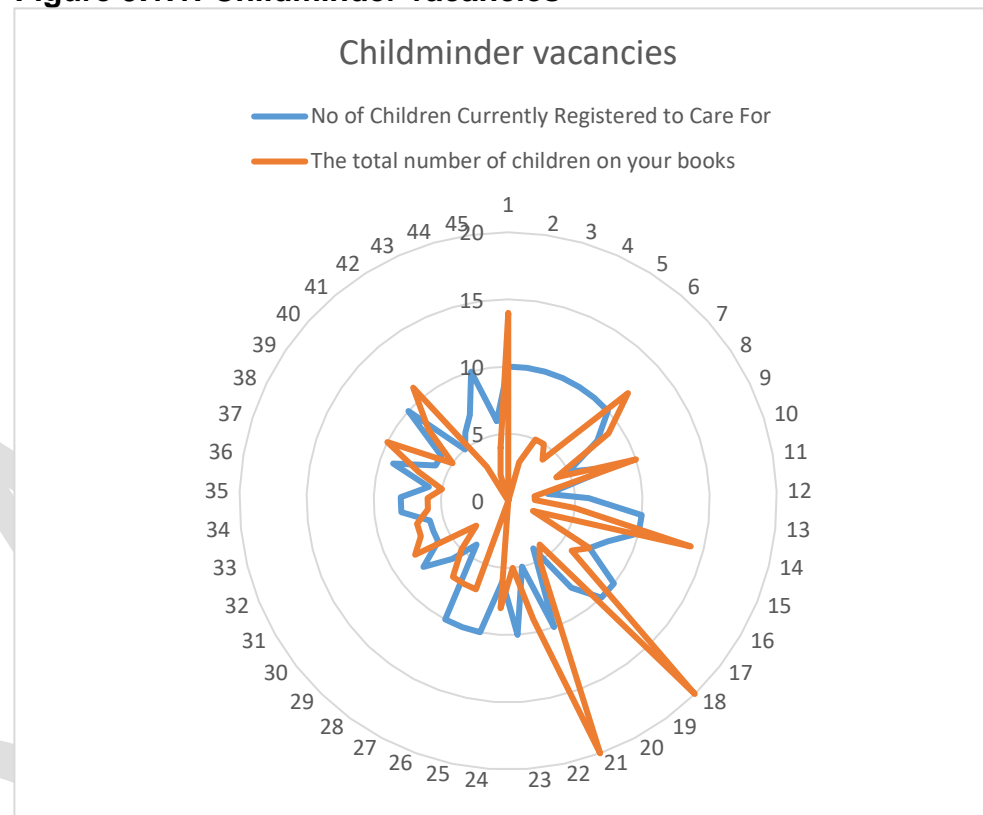
Childminders operate from their home premises and the number they are registered for is determined by the space available within the home. Although many childminders are registered for 10, some accept fewer children than they are registered for due to many reasons dependent on personal situation that include: personal choice to keep numbers low; are newly registered and building up their numbers gradually; car capacity for school runs in this largely rural area; ratios determining age of children e.g. only 2 children under 18 months allowed, and they must include their own children within the ratios. Therefore, analysing the gap is not as straightforward as comparing numbers registered for against the number of children on their register. Some childminders have many part time children and therefore have more on their register than registered for, and offer after school care for additional children.

One provider responded that since the Childcare Offer, eligible children were taking advantage of the Childcare in a sessional setting, whilst children under 2 years old were the main age group at a childminder.

*“Childminder numbers are affected by local Cylch Meithrin accepting children from the age of 2 years. Parents often seeking wrap around care for these children which affects the child ratios.”*

The graph shows that some Childminders have nearly double the numbers of children on their register than what they are registered for. This is often due to part-time demand of Childcare provision, and the flexible nature of Childminders to offer after school spaces within their age ratios.

**Figure 9.1.1: Childminder vacancies**



**9.2 FULL DAY NURSERY**

**Full analysis of Full-day Nursery data is available in the ‘Overview Section’:**

There are only 6 registered Full Day Care Nurseries in the county. The lack of full-day care remains to be an issue in the south of the county as no provision has developed since the last assessment. One application has been made for planning permission to open a new nursery, but due to concerns by Natural Resources Wales regarding phosphate levels around the river Teifi, all planning application processing have been temporarily paused. This is a major issue as it is impacting the development of a new private business which could have addressed the gap for full day care provision in the south of the county.



An additional Full Day Care Nursery opened during the last CSA reporting period offering 19 places in mid Ceredigion. Unfortunately, this setting closed during 2021 which resulted in the loss a Full Day Care setting who also offered out of school childcare in the area.

There remains to be high demand for full day care provision as the day nurseries were reporting waiting lists for immediate starts within some areas. Since the last CSA, one Full Day Nursery opened mid county, but unfortunately closed within two years of opening, which highlights the challenges faced by providers to maintain their business.

Funding rates and fees also continue to be an issue. Increases in minimum wage, NI and pensions are going to have a considerable effect on the sustainability of some settings (even without considering increased cost of living). There is a concern that parents will not be able to pay increased fees and that new Childcare Offer funding rates will not cover costs.

There is increasing concern that schools are competing for the 3 and 4 year olds. With the high staffing ratios required for younger children, nurseries are finding it hard to remain sustainable when they are top heavy with babies and under 2 year olds if these children do not stay for Early Education.

### 9.3 SESSIONAL DAY CARE & SESSIONAL FULL DAY CARE

Full analysis of Sessional Day Care and Sessional Full Day Care data is available in Overview Section based on the information submitted in the SASS and the data collected by Childcare Unit, broken down to term time, holidays and after school services provided in each MSOA area.

CIW information stated that Ceredigion had 28 registered sessional Day Care or Sessional Full Day Care settings when the SASS was undertaken. This was the equivalent to 571 Childcare places for children aged 2-4 years of age.

There is also an additional new Sessional Full Day Care setting registered for 16 spaces that offers holiday provision within a Forest school / outdoor environment for ages 5+. All settings completed the SASS with a 100% completion rate.

There is **1 new unregistered Cylch Meithrin** going through the registration process and hope to be registered as a Sessional setting by Spring 2022 (offering 19 places).

Since the introduction of the Childcare Offer, many of the sessional settings who offered morning and afternoon sessions have now registered as Sessional Full Day Care. Of the **17 settings** that now run an afternoon session, 3 provide an opportunity for an extra **42 Childcare places**.

#### Language

	<ul style="list-style-type: none"> <li>• 27 of the 28 of the registered sessional settings are fully Welsh language settings,</li> <li>• 1 sessional setting not included in numbers above has a Forest school sessional full day care registration and hoping to increase Welsh language provision</li> <li>• 1 new unregistered setting is a Welsh medium setting.</li> </ul>
<b>9.4</b>	<b>CRÈCHES</b>
	<p>There is one registered Crèche provision in the South of the county which is registered for activities in the Children’s Centre. No data was submitted on the SASS with regards to numbers, fees etc. as the provision is for the families attending and using the services at the Centre on an ad-hoc basis.</p> <p>There is also a Crèche provider registered mid County. This provision has historically provided services when required to deliver training, Holiday Playscheme, open access play provision. Pre-pandemic, the provider was able to offer Holiday Playscheme provision, which is our rationale for re-categorising as a ‘<i>Crèche and Holiday Playscheme</i>’. However, to date this service has not re-started delivering their services since the pandemic due to other commitments on the Family Centre premises.</p> <p>We are aware that Flying Start and Family Centres offer unregistered Crèche services which run under 2 hours to enable parenting courses etc. to be delivered on their premises.</p> <p>We do not have any Crèche services which offer Childcare on an ad-hoc basis.</p>
<b>9.5</b>	<b>OUT OF SCHOOL CARE</b>
	<p>From September 2021, Out of School Clubs were able to re-open and operate as usual. However from December 2021 there were some restrictions placed by the Local Authority as well as individual Head Teachers in light of the Omicron COVID-19 Variant. Demand for the Provision is currently less than pre-pandemic, however, Out of School Clubs are beginning to see an increase in children attending due to awareness that the session are able to run again. Another factor that needs to be considered which influences Out of School Clubs is the new way of working, where a lot of families may have a parent working from home and are therefore able to collect their children from school with no need to access the Out of School Club provision.</p>

Clybiau Plant Cymru Kids Club (CPCKC) who are members of the CWLWM umbrella organisations published a report on the '**State of the Out of School Childcare Club Sector**' which was conducted in Summer 2021 with findings and recommendations to "*support this part of the Welsh foundational economy revive and go on to thrive and support their communities post Covid-19*".

Their findings found that 33% of parents surveyed across Wales would no longer be using Childcare or using less than before the pandemic, with a further 7% unsure how much they will use, mainly due to uncertainties around working from home.

30% of those parents surveyed did not understand the benefits of CIW registration, and therefore unable to make fully informed decisions about their Childcare choices and help with Childcare costs. They also reported that over 19% of Welsh Out of School Childcare clubs had closed permanently, and 33% of those clubs surveyed cited access to venues as a the reason that they have been unable to reopen, with 35% of those temporarily closed uncertain if they would re-open later that year. By September, 20% of clubs remained closed across wales, with reasons cited as Access to venues; Insufficient take up of places and Recruitment of suitably qualified staff.

This uncertainty continued into Autumn, especially in Ceredigion where restrictions remained until end of September 202). Three after school clubs have closed permanently during the last 18 months, two of which also provided a holiday club. This has been a loss of **96 places** to the out of school sector.

The reasons given for closing are mainly due to difficulty in getting voluntary committees to run the provision and difficulties in recruiting staff. One offer after school club and holiday club is also currently closed in a 3-19 school. This is due to lack of personnel to run the committee and recruitment of qualified staff to run the provision. Childcare Unit and the school are investigating alternative methods to re-open the provision. At the time of writing this report work is underway to work with Mudiad Meithrin in the aim to reopen an After School Club in Cardigan and Llwyn yr Eos.

Working patterns have had a significant impact on the number of children attending clubs that we do have open. However, parents who really rely on this service do value the provision available. But, the clubs require sustainability funding if they are to continue operating with lower numbers.

### **CPCKC PROVIDER SURVEY RESULTS**

6 settings from Ceredigion responded to the Provider survey. 5 were open with 1 temporarily closed due to Venue access/Local Authority imposed closure. All 5 who were open reported that attendance had decreased since March 2020, with 2 stating that they may have to close permanently, or reduce hours/days. 1 setting would have to make staff redundant.

**Consequences stated as:**

*The committee do not want to increase fees as they are a charity and they do not find it fair on the parents that do use the club but they are just about covering costs due to the decrease in the number of children attending.*

**Please tell us about any positive outcomes Covid-19 has had for your setting/children/families?**

*Staff are lucky to be able to continue working and obtain hours in the nursery. If it wasn't for the nursery shifts they would have had to lose staff.*

*Recently had a CIW inspection. CIW were very pleased with how they have adapted to new regulations, policies and procedures due to Covid19. Leader is very happy and proud of the setting and how they have coped throughout.*

**Provider Comments:**

*The club was originally held in Ysgol x but due to restrictions have moved to the nursery where the staff are situated. Numbers have been very low and the setting reduced the days the club was running but is starting to build up numbers and are back up to 5 days a week.*

*The setting is currently open for one child 3 nights a week. The setting has already reduced the amount of days they run and are trying their best to advertise through the school, however children are not attending as they were pre Covid. The leader is very concerned for the future of the club and has discussed with staff and committee that they will keep trying until Christmas but if numbers of children don't increase they will be closing. The setting is running at a great loss paying two members of staff and only one child attending.*

*Setting is open but numbers have reduced so much they are just about 'making ends meet'.*

*Afterschool club has remained closed due to being on school ground the school and the local authority wanted them to keep the children in the same bubbles as the schools. 'This was impractical for the setting and unfair on the children' Hope to reopen in September*

*The club is open but has had to move venue. Usually held in Ysgol X it is now held at the nurse's due to the school not wanting to 'mix bubbles'. The numbers of children have reduced because of this. Setting is unsure when they will be able to move back to the school. The school will not allow the usual summer club run at the school this year.*

*Afterschool club is closed (temporarily) holiday club reopening this summer.*

## **9.6 OPEN ACCESS PLAY PROVISION**

We have no registered Open Access Play provision in Ceredigion. All provision has de-registered since the last CSA. Play has recently moved departments within Ceredigion County Council. Play now sits within the Wellbeing Centre Service of Porth Cymorth Cynnar in the Through Age Wellbeing Model and it is hoped that this will enhance the opportunities for collaboration with internal key partners and targeted groups as well as the third sector.

RAY Ceredigion was funded by Families First to offer open access play sessions as a means of engagement with 'hard to reach' families. From 2023, this funding will be used instead to offer more opportunities from venue based provision in Family Centres, RAY Ceredigion centre, ICC's and Children's Centres.

Within the Through Age Physical Activity & Play team, a Play Development Officer will be employed in order that the Council is able to offer open access play sessions side by side with more traditional sports and leisure activities for young people.

## **9.7 NANNY**

There is no requirement for nannies to complete the SASS. Therefore, no information is available with regards to Nannies registered on the Approval Scheme of Home Childcare Providers (Wales) Scheme.

The monthly list FIS receive from CIW identified that we had 2 nannies registered on the 'Home Approval Scheme' in December 2020, this decreased to 1 by July 2021. However, by now there are none in Ceredigion since they de-registered in October 2021.

## **STRENGTHS AND WEAKNESSES**

## **Childminders:**

### **Strengths**

- Childminders are evenly distributed geographically across the authority.
- Childminders offer more flexibility in offering services in rural areas as have lower overhead costs than full day care provision.
- Good quality care – Inspections available online CIW

### **Weaknesses**

- Some pockets of areas identified as needing more childminders.
- Some childminders reporting they had vacancies. But, on the whole many reported waiting lists.
- Some pockets of areas identified as needing more childminders.
- Some childminders reporting they had vacancies. But, on the whole many reported waiting lists.
- Need recognition from health and education professionals of the service and value of care given to children

## **Full day care:**

### **Strengths**

- Good quality provision as identified in CIW inspection reports (available publically)
- 83% provision in Welsh or bilingual

### **Weaknesses**

- South of the county remains an area with no full day-care provision.
- Planning issues around the river Teifi have halted the development of one private business wanting to open a day nursery.
- Rising costs for wages, NI contributions, pension, utility costs etc. affects the overhead costs and could lead to increased fees passed on to parents.
- Recruitment has been identified as a real issue as providers unable to get qualified staff.

## **Sessional Care:**

### **Strengths**

- High percentage of Welsh-medium Childcare available (93%).

- Childcare Offer has benefitted settings which has led to them changing opening hours to register as full-day care providers.
- Good support from CWLWM umbrella bodies development officers

### **Weaknesses**

- Sustainability of Committee led settings (especially in smaller rural areas where not operating at full capacity) is a concern. Future 2 year old funding may be very positive for these settings.

### **Out of School Care:**

#### **Strengths**

- Provide a valuable service for working parents
- Provide valuable play opportunities for children
- Financial support available for working families to access e.g. Tax Free Childcare, Childcare Offer for Wales, Childcare Vouchers
- Usually available on School grounds therefore no need to travel to an alternative provider

#### **Weaknesses**

- Parents working from home, meaning slightly reduced demand for Providers
- Parents on shift work may not be able to access the hours provided
- Inability to access school transport after 3:30pm a barrier for use of provision
- Difficulty recruiting qualified staff due to the hours not being Full Time or reaching the minimum threshold of 16 hours a week to access support

### **CURRENT CHALLENGES FACING THE SECTOR:**

#### **Staffing**

- Most staff on National Living Wage, no pension contribution – not an attractive career option
- Setting leaders on slightly higher rate – but does not match teacher rate who also complete Estyn inspections (do we need to include that graph on comparison of wages of care sector/teacher/Childcare?)
- Staffing challenges due to staff self-isolation (Covid-19)
- Staff retention - Loss of staff to other sectors (retail, schools)
- Staff recruitment – lack of suitably qualified staff – especially with Welsh language skills
- Low morale – staff feel undervalued. Little recognition, no bonuses like those given to the care sectors

- Issues recruiting staff who are able to provide ALN support due to low contract hours and termly reviews of Cynllun Cyfeirio for children
- Contracted hours – not suitable – affects Universal Credit, short term contracts / zero hours
- Increased demand on qualifications – but wages not reflected

**Sustainability**

- Rent and Utility cost increases
- Increasing NMW / NLW and NI costs – Pension and holiday contribution etc. whilst also being ‘affordable’ for parent/carers
- Continued apprehension by some schools preventing return / limiting numbers / enforcing unsustainable groupings which has detrimental effect on after school clubs
- Higher costs due to increased cleaning required due to pandemic
- Training is beneficial but with limited staff, most Settings cannot release staff to attend due to having to keep to qualified staff: child ratios at all times (NMS guidance) and limited bank staff availability. Settings need to find additional funding to pay staff for their time to attend training in own time.
- Long term vision is difficult to be achieved with short term funding pots – and consider funding for revenue support not just capital resources.
- Partnership working required to ensure as many Settings as possible are able to benefit from any available funding, and to prevent further closures
- Potential for Settings to partner up in innovative ways to meet demand sustainably and/or ‘diversify’ their current provision
- Some Settings are not opening over holiday periods (or over the full holiday period) – impacting on families and potentially losing valuable income opportunity.

**10 UNREGISTERED AFTER SCHOOL / HOLIDAY PROVISION (OUT OF SCHOOL CARE)**

**Table 10.1: Unregistered provision – Advantages and Disadvantages:**

<b>Unregistered After School / Holiday Provision (Out of School Care)</b>	
<b>Advantages for families:</b>	<b>Disadvantages for families:</b>
<ul style="list-style-type: none"> <li>• Provision available for families – after school on school sites</li> </ul>	<ul style="list-style-type: none"> <li>• Parents cannot access financial support schemes</li> </ul>



	<ul style="list-style-type: none"> <li>• Unregistered activities in holidays – cheaper for families</li> </ul>	<ul style="list-style-type: none"> <li>• Time-cap – restricted to 2 hours or less per day – which can include breakfast club and after school combined – but this is not being monitored by CIW</li> <li>• Not inspected by CIW – parents cannot see evidence of quality of Childcare provided</li> <li>• No qualified Play practitioners – no monitoring of play provision</li> <li>• Holiday provision – is not available during full working day (e.g.8 – 6) – they are generally shorter sessions</li> </ul>	
	<p><b>Advantages for settings:</b></p>	<p><b>Disadvantages for settings:</b></p>	
	<ul style="list-style-type: none"> <li>• No need to meet NMS standards or regulations e.g. qualifications,</li> <li>• Staff ratios are 1:8 for Childcare settings, whilst in education settings, ratios for Age 3 and over if staff have a teaching status is 1:13 children. Leisure/sport ratios (TBC)</li> <li>• No CIW inspections (unannounced visits) therefore no need for policies etc. or stress of inspections</li> </ul>	<ul style="list-style-type: none"> <li>• Unable to access grant support from WG/CCC</li> <li>• Not charitable enterprises – but school managed. May be eligible for some other grants</li> <li>• Pay scale of teaching staff v. Childcare staff</li> </ul>	

**11 BREAKFAST CLUB PROVISION**

Breakfast clubs remain an important service for parents when regarded as Childcare. Although they are not CIW registered provision. Many parents rely on the service to allow them to get to work on time. The pandemic meant that many schools had to stop providing the breakfast club or provide a reduced service and schools had to prioritise which families could access it as they had no alternative. This was due to having to keep children within their bubbles and meant that they could not mix children during breakfast club.

The parent/carer survey demonstrated that 27% used a Breakfast club. A further 26% indicated that they would use Breakfast clubs in the future.

Parents feedback also highlighted:

- *“What I need most is after school Childcare where he can be collected from school by the care provider, in order to enable me to work through school pick up time. Also breakfast club available at school would be helpful (he's in year 5 and there's never been breakfast club, although there used to be before school 'club')”*
- *“After school club pick up - up to 6pm. Youngest is not able to go to breakfast club until age 4 despite being in the school for the morning session”*
- *“Most primary schools in Ceredigion do not cater for working parents, no breakfast or after school club.”*
- *“There is no breakfast club or after school club at my children’s primary school. This means I cannot work any day shifts at the hospital and can’t take any contracted hours. I currently work nights whilst partner works days.”*
- *“The issue I have is breakfast club provided by the school, it starts at 8.20am, I have to start work at 8:30am. 8am would be far more suitable given the morning rush to get to work and find parking to get to my place of work. I am a single parent working 48 hours a week”*

The introduction of the Childcare Offer also led to many sessional care settings changing their registration to full day care provision. This resulted in some of these settings opening earlier from 8:30am. Which meant parents could drop the children off earlier and get to work.

The breakfast provision was disrupted by COVID-19 pandemic – but this is the data available in Autumn 2021 and cross referenced with Schools Survey feedback.

**Table 11.1: Summary Breakfast Club provision per MSOA:**

	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystu	New Quay & Penbryn	Lampeter & Llanfihang	Cardigan &	Beulah, Troed-yr-aur &	Rheidol, Ystwyth & Caron	TOTAL
Breakfast Club - Food (funded by CCC)		1	3	1	3	3	3	1		15

Breakfast Club - Food (funded by School)		1		1	1				1	4
Breakfast Club - Food (paid for by service user)								1		1
No Breakfast club service	1					2	1		3	7
Breakfast Club - Childcare only	3			3	1				3	10
<b>TOTAL</b>	<b>4</b>	<b>2</b>	<b>3</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>2</b>	<b>7</b>	<b>37</b>

**Table 11.2: Breakfast Club provision in schools per MSOA:**

	School* Cross referenced with Schools Survey	Breakfast Club - Food (funded by CCC) (Nov. 2021)	Breakfast Club - Food (funded by School) (Nov.2021)	Breakfast Club - Food (paid for by service user)	No Breakfast Club service	Breakfast Club - Childcare only (Nov./2021 )
<b>Aberaeron &amp; Llanrhystud</b>	Aberaeron	Yes				
	Ciliau Parc (Ciliau Aeron)					Care only
	Llangwryfon		Yes			
	Llanon					Care only
	Myfenydd Llanrhystud					Care only
<b>Aberystwyth</b>	Comins Coch		Yes			

			St Padarns	Yes				
	<b>Aberystwyth South</b>		Llwyn yr Eos (Penparcau)	Yes				
			Plascrug	Yes				
			Ysgol Gymraeg Aberystwyth	Yes				
	<b>Beulah, Troed-yr-aur &amp;</b>		Bro Teifi (Llandysul)			Yes		
			Cenarth	Yes				
	<b>Borth &amp; Bont-goch</b>		Craig yr Wylfa (Borth)				No	
			Penrhyncoch					Care only
			Rhydypennau					Care only
			Talybont					Care only
	<b>Cardigan &amp; Aberporth</b>		Aberporth	Yes				
			Aberteifi	Yes				
			Llechryd				No	
			Penparc	Yes				
	<b>Lampeter &amp; Llanfihangel Ystrad</b>		Bro Pedr (Lampeter)	Yes				
			Dihewyd				No	
			Dyffryn Cledlyn (Drefach)	Yes				
			Felinfach				No	
			Y Dderi (Llangybi)	Yes				

	<b>New Quay &amp; Penbryn</b>	Bro Sion Cwilt (Synod Inn)					Care only
		Cei Newydd	Yes				
		Llanarth	Yes				
		T. Llew Jones (Brynhoffnant)		Yes			
		Talgarreg	Yes				
	<b>Rheidol, Ystwyth &amp; Caron</b>	Henry Richard (Tregaron)				Unknown	
		Llanfarian				Unknown	
		Llanfihangel y Creuddyn				Unknown	
		Llanilar		Yes			
		Mynach (Devil's Bridge)				No	
		Penllwyn (Capel Bangor)					Care only
		Pontrhydfendigaid				No	
		Rhos Helyg (Llangeitho)					Care only
		Rhos y Wlad (Bronant)					Care only
		Syr John Rhys (Ponterwyd)				No	
	<b>TOTALS</b>	<b>40 schools</b>	15	4	1	7 No + 3 Unknown	10

## 12 UNDERSTANDING THE NEEDS OF PARENTS/ CARERS

As identified in the introduction we utilised the national parent/carer survey to gather the views on the use of Childcare in Ceredigion. A Communications Plan was developed in partnership with the Council's Communications Team to promote the survey widely across different platforms.

The survey was shared with key stakeholders including all Childcare Providers, CWLWM partners, Public Service Board members, Schools, Children and Young People Forum members, and Hywel Dda University Health Board colleagues – requesting all to share with their employees, clients and networks to reach as many parent/carers as possible with pre-prepared Social media messages and Welsh Government images for use on their own social media platforms.

Childcare Unit staff attended three Regional Head teacher meetings and requested that School Head teachers shared the survey via their communication methods such as Parent Mail, Schools social media sites, e-mails, letters etc. with families. Unfortunately not all schools shared the survey with their parents. In order to increase the response rate, emails were sent directly through the education database system to all parent/carers who provided emails in 40 primary schools.

Key Stakeholders who have access to their own social media sites also assisted in promoting the survey such as the Family Centres, Ceredigion Actif, Cered, Flying Start and RAY Ceredigion.

### **OTHER PARENT SURVEYS AND CONSULTATIONS**

In addition to the Welsh Government Parent Carer Survey there were numerous other consultations open for parents to highlight their views regarding Childcare provision during Autumn 2021 these included:

- Ceredigion Public Services Board Assessment Of Local Well-Being
- Ceredigion County Council Employee Health And Wellbeing Survey
- Ceredigion County Council Family Support Survey - consulted with parents around the support they receive from services
- Clybiau Plant Cymru Kids Clubs National Survey June 2021– 10% responses from Ceredigion Parent/carers
- Urdd Parent Survey for Ceredigion and Pembrokeshire– approx. 60% responses from Ceredigion parent/carers

The results are included below:

## CEREDIGION PUBLIC SERVICES BOARD ASSESSMENT OF LOCAL WELL-BEING

Childcare Unit have taken account of the comments raised in the Ceredigion Public Services Board Assessment of Local Well-being Autumn 2021 and are working with the PSB team to further refine the actions.

The Ceredigion Assessment of Well-being consultation also asked Ceredigion citizens including children what mattered to them, and the following comments in relation to Childcare provision were taken from the Well-being Survey:

- *“More support, resources and funding is needed for Childcare sectors/ settings”*
- *“I need access to affordable Childcare outside school hours. Alternatively, an option to reduce working hours.”*
- *“To be able to improve my own physical and/or mental well-being I need access to more affordable Childcare.”*
- *“Available Childcare (preferably affordable too, but let's just start with there being any at all!)”*
- *“Access to affordable Childcare outside of core school hours. Alternatively, an option to reduce working hours. There is not much opportunity for part time work in this area with a decent wage. Wages in Ceredigion are low, however the cost of living is high. This needs to be addressed.”*

The Assessment identified that poverty remains one of the biggest challenges for the county and identified that Low earnings and incomes, affordable Childcare, Universal Credit reduction and high housing costs/ housing affordability are the drivers of poverty in Ceredigion.

Since 2020, an annual Ceredigion County Council **EMPLOYEE HEALTH AND WELLBEING SURVEY** is conducted by the Employee Health and Wellbeing Officer, and has found that Childcare issues have an impact on the wellbeing and productivity of staff working from home who need to juggle all their parenting, Childcare, home schooling, other care commitments, and work responsibilities in an ever changing environment. School procedures and closures impacted breakfast club and after school care with a knock on effect on working parents.

**Table 12.1: Ceredigion County Council Employee Health And Wellbeing Survey results**

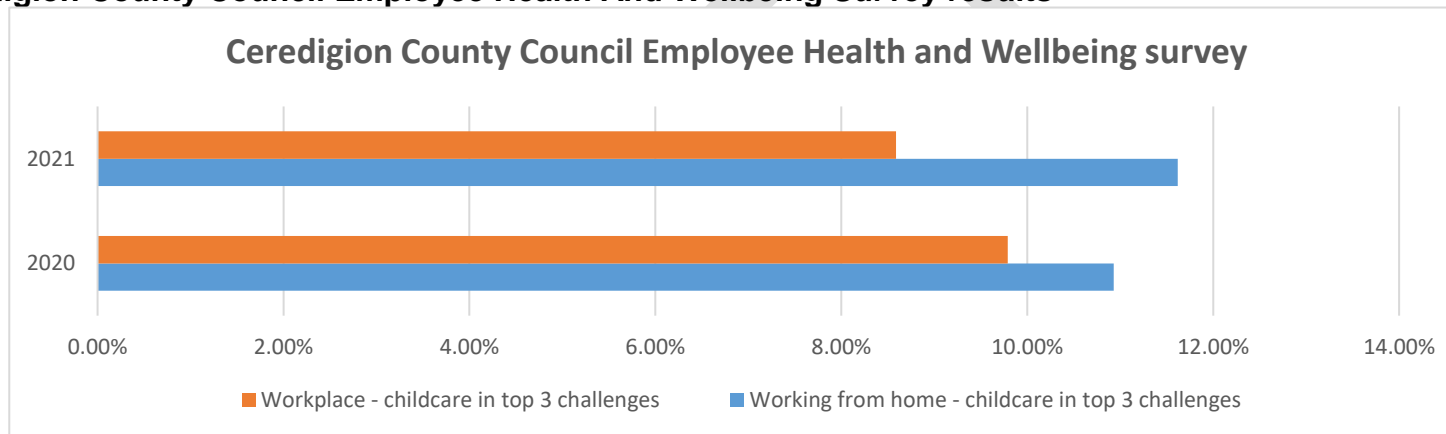
2020	10.93% of respondents counted Childcare as one of their top 3 challenges of working from home. 9.79% of those in the workplace placed Childcare in their top 3 challenges.
2021	11.62% counted Childcare as one of their top 3 challenges of working from home.  8.59% of those in the workplace counted Childcare as one of their top 3 challenges.
Qualitative data:	<i>“Whilst there has been added flexibility it has been looked at as not supporting the team fully if we use the ability to step away for a few hours, and it has been used more in respect of people needing to provide Childcare whilst others have not really been expected to use it”.</i>

Feedback regarding flexitime arrangements

*"I would like to see this bandwidth remain - it helps so much with the extra workload, and having to fit in school pick-ups, Childcare, other chores".*

*"With a family and no afterschool Childcare and care for elderly parents flexi is essential".*

**Figure 12.1: Ceredigion County Council Employee Health And Wellbeing Survey results**



**FAMILY SUPPORT SERVICES IN CEREDIGION**

An online Family Support Services survey was held during July-September 2021 which received 295 responses. The survey asked if they use or have used preventative family support services for children 0-11 in Ceredigion (the services were listed). Those who answered 'No' were asked why they do not use them. Those who answered 'Yes' were asked, 'What's good about the services?' 'What's not so good?' and 'How can we improve your local family support services?'

From the responses 90% of responses were from Mothers, 6% from Fathers and 4% from 'other'. 93% responded in English and 7% in Welsh. 47% did use the services and 53% did not use the services. The majority of those who didn't use the services said that it was because they didn't know about them.



Some of the responses received made comments around the use of Childcare provision or lack of Childcare provision. Here are the comments received:

**What's good about the services you've used?**

- *Free early year's Childcare in Penparcau.*
- *Used Flying Start for free pre-school Childcare for my son in Cylch Meithrin Aberystwyth which was Welsh medium and had fantastic staff.*
- *Help with Childcare and costs*
- *Funding for pre-school Childcare has helped my child to maintain social connections with other children and continue development during the pandemic*
- *Play scheme has allowed son to access his usual school building. Less stressful for him to return to school in September.*

**How can we improve your local family support services?**

- *More for younger children in holidays*
- *Affordable after school club in Penparcau will help more parents into work.*
- *After school and more holiday provision for children with additional needs. Increase the wage for PAs and training available for them to increase incentive for them to apply for jobs*
- *Would love to have a playscheme in Cardigan for the summer holidays or any similar flexible and affordable Childcare where you know your kids are safe and having fun while you're at work*
- *Ceredigion has good basic family support services but are extremely lacking in day care and progressive early years settings for working parents in the county*
- *Also Childcare provision in Borth is very poor for working parents - there is no after school club or holiday club and not a single childminder anymore.*
- *An after school club is certainly needed (Cardigan).*
- *Need more Childcare providers for afterschool so families can work. Would also be good to see more affordable after school activities for the local families (Penparcau).*

**What's not so good about the services you've used?**

- *Dash haven't restarted yet*
- *Lack of support for older children in terms of Childcare*

- Not many activities for children to do after Meithrin which for my child finishes at 12 o'clock (Lampeter).
- Not so much for children to do after they finish Meithrin at midday (Lampeter).
- Nothing open after school hours (Tregaron).
- Not many options of Childcare settings - I believe only Penparcau school now

## URDD PARENT SURVEY:

Urdd Sport Ceredigion and Pembrokeshire developed an online survey in September 2021 entitled 'Community Sports for Primary Children' to target local parents in order to develop their community programme of sports activities for children.

From 100 responses, approximately 60% were Ceredigion families/attended a Ceredigion school.

46% responded in Welsh, 54% in English.

Schools that the children attended:

**Table 12.2: Urdd Parent response per county**

Total responses	Ceredigion	Pembrokeshire	Carmarthenshire	Other (home schooling)
100	60	32	7	1

**Table 12.3 - Urdd – Time most convenient for activities**

What time would be most convenient for your child to take part in sporting activities?

Straight after school	4p m	5p m - 7p m	Anytime	Saturday	Sunday	Lunch time	Holidays
37	41	25	7	8	6	1	1

**Table 12.4 - Urdd – Holiday activities**

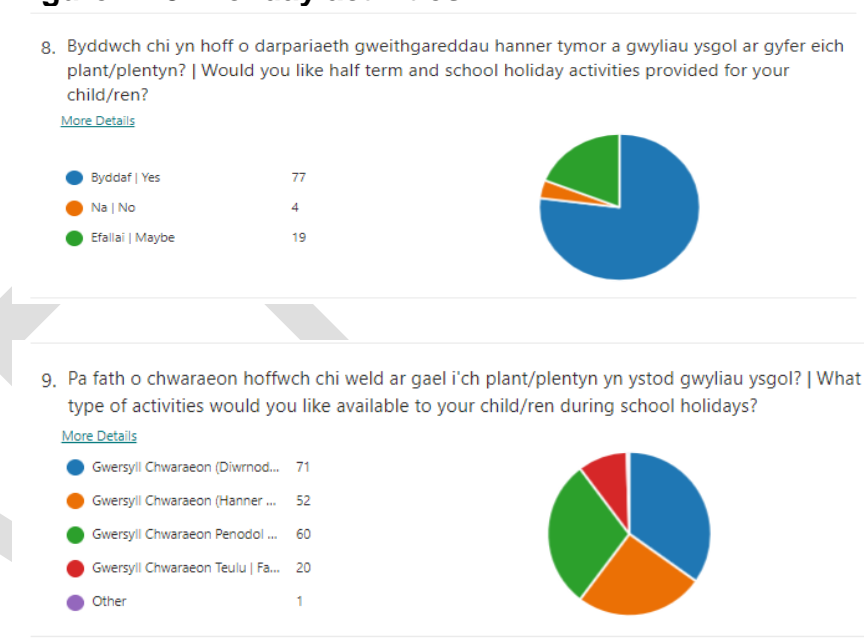
Would you like half term and school holiday activities provided for your child/ren?

Yes	No	Maybe
77	4	19

**Figure 12.2: Time most convenient for activities**



**Figure 12.3: Holiday activities**



**Parent comments:**

- *“I fod yn onest, ar ôl y 19 mis diwethaf, byddem yn ddiolchgar o gael unrhyw beth!” (“To be honest, after the last 19 months, we would be grateful for anything!”)*
- *“There isn't a lot of affordable activities and clubs after school in the area. It would be nice for children to have things to do after school which they enjoy and to help keep fit.”*
- *“Buasai teilwra dechrau gweithgareddau i derfyn dydd yr ysgol yn ddefnyddiol h.y. clwb ar ol ysgol gyda gweithgareddau chwaraeon penodol.” (Tailoring the start of activities to the end of the school day would be helpful ie an after school club with specific sports activities.)*
- *“Very little sports provision in evenings at Bro Teifi after it was opened although the community were told there would be access to the facilities there - there never has been”*

As a result of feedback, October half term activities were arranged in some locations and were successful. Since autumn half term the Urdd Development officer established after school clubs in Talybont, Tregaron and hope to start clubs in the Aberystwyth and Llangrannog area in the New Year. There was a demand from Llandysul and Aberystwyth areas – but no facilities were then available to hold any Urdd Club.

### **CLYBIAU PLANT CYMRU KIDS' CLUBS (CPCKC)**

Clybiau Plant Cymru Kids' Clubs are members of the CWLWM umbrella organisation and support the Out of School Club (OSC) Sector which include After School Clubs (ASC) and Holiday Playschemes.

During June 2021 Clybiau Plant Cymru Kids' Clubs invited all parents/carers of children aged under 12 years living in Wales to complete an anonymous short survey to help to identify attitudes towards Childcare, the potential demand for Childcare going forward and reasons for fluctuations in demand in comparison to pre-March 2020.

According to CIW data in June.2021, only 50% of Ceredigion settings had re-opened during this period after closure due to the pandemic. The majority of the settings still closed were After School clubs.

#### **Parent Response**

From a total of 2050 responses across Wales, 10.3% responses were from Ceredigion. Ceredigion parents gave a disproportionately large amount of responses – 4<sup>th</sup> highest county in Wales in terms of number of responses and were probably motivated to respond due to the situation throughout the county in June as settings were unable to open on school sites. By the Autumn Term, the After School provision was slowly recovering, but some areas remain without After School provision due mostly to staff shortage rather than venue access.

## **13 OVERVIEW OF PARENT /CARER CONSULTATION**

Of those that started to complete the Welsh Government Parent/Carer survey only 60.9% completed the survey on a national level.

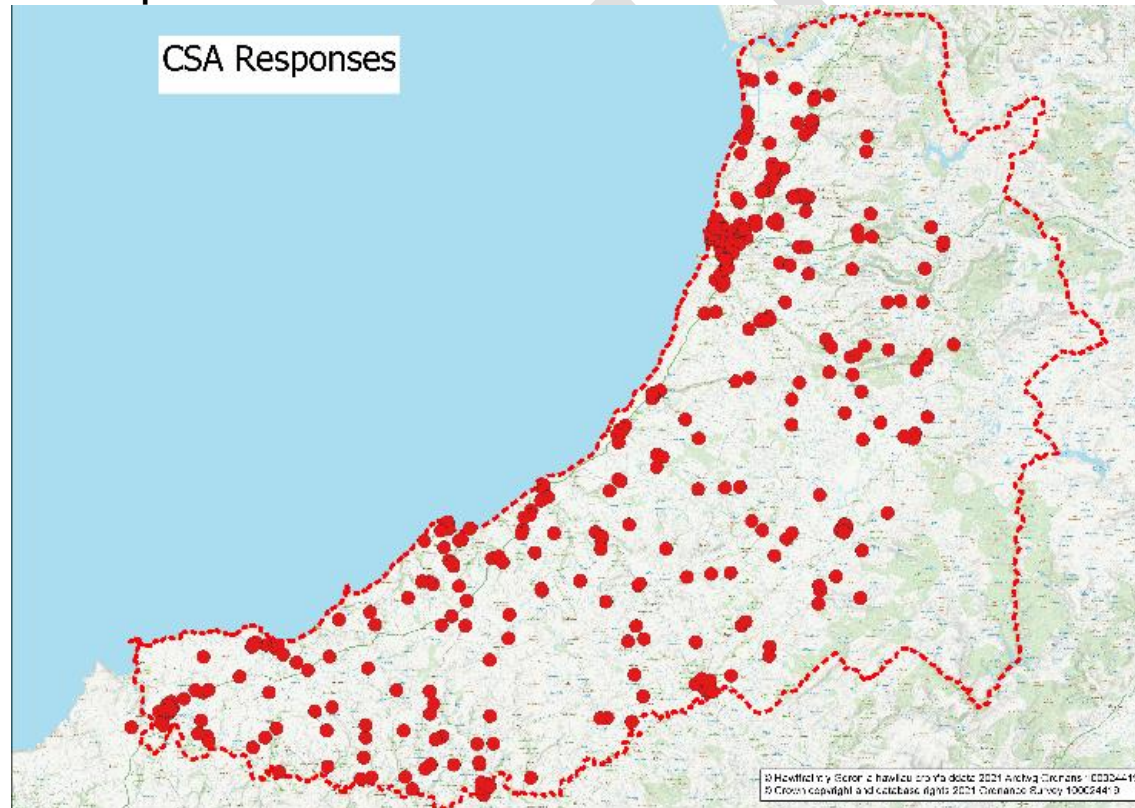
In Ceredigion, 633 parent/carers completed the survey which accounted for 7.35% of all responses (third highest in Wales next to Carmarthenshire and Rhondda Cynon Taf) with a good geographical spread. In comparison, Ceredigion have just 2.5% of the country's registered Childcare providers.

The high volume of response in both this survey and the CKCPC survey (10%) in comparison to registered Childcare (2.5%) reflect the concern parent/carers have for the availability of Childcare provision in the county.

From the response 554 parent/carer postcodes could be mapped. 79 did not provide sufficient postcode details to be mapped. The postcodes covered all 40 electoral wards within the 9 Middle Super Output Areas (MSOA). All areas of Ceredigion were covered from the parent's survey.

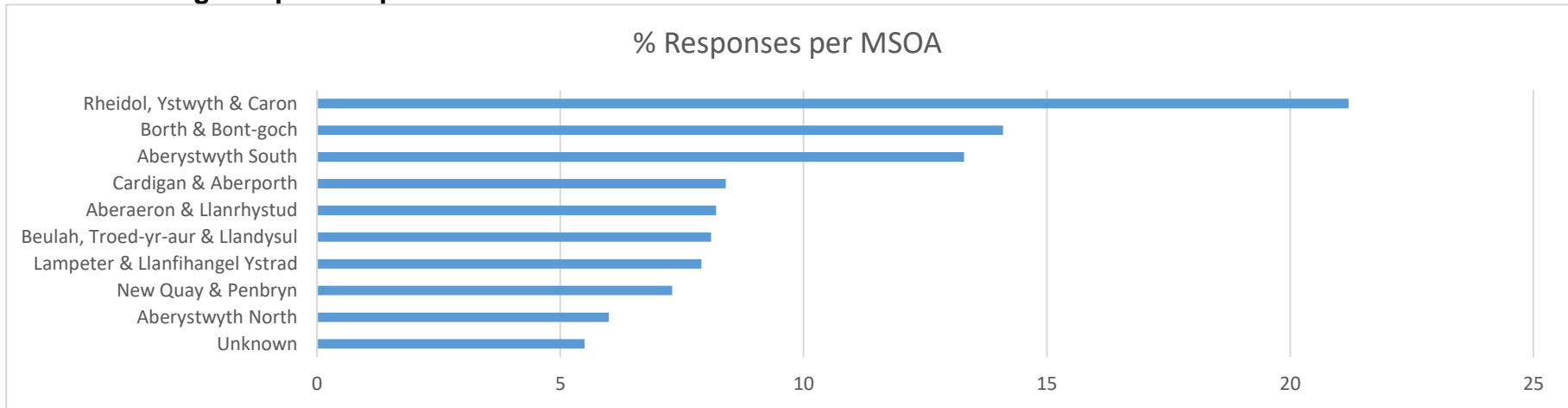
Due to local COVID-19 restrictions, officers were unable to visit any family centres or public places to hold face to face consultations with parent/carers. However, with supportive stakeholders from Family Centres and partner organisations, we were confident that the message had been shared widely. It should be noted that not all respondents answered all questions. Parent responses are mapped as below:

**Figure 13.1: Distribution of parent responses**



Further evidence of feedback from parents can be seen in Annex 2. The feedback is recorded per MSOA.

**Figure 13.2: Percentage responses per MSOA**



**Table 13.1: Household description**

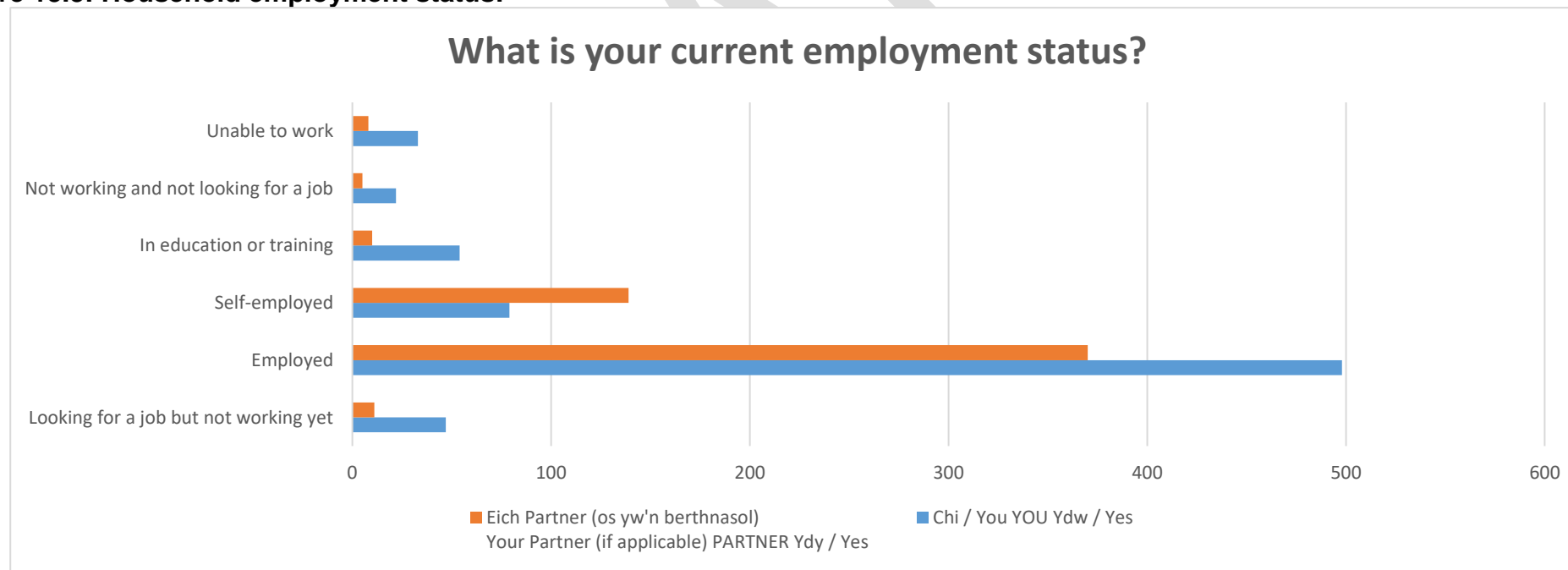
Which of the following best describes your household?	Yes	%
I have sole responsibility for my children	103	16.3
I share responsibility for my children with someone I live with	491	77.6
I share responsibility for my children with someone I don't live with	53	8.4
I am a parent to be	11	1.7
I am a foster carer	4	0.6
I am a grandparent	9	1.4
Other (please explain):	7	1.1

- 77.6% of respondents shared responsibility for their child(ren) with someone that they live with. With 16.3% had sole responsibility for their child.
- 1.7% respondents were recognised as parents to be.

**Table 13.2: Household employment status:**

What is your current status?	You	Your Partner (if applicable)
Looking for a job but not working yet	47	11
Employed	498	370
Self-employed	79	139
In education or training	54	10
Not working and not looking for a job	22	5
Unable to work	33	8

**Figure 13.3: Household employment status:**



- The highest number of respondents (498) and their partners (370) were in employment. With 22 respondents and their partners (5) not working or looking for a job. 79 respondents and their partners (139) were self-employed.

Respondents by annual household income

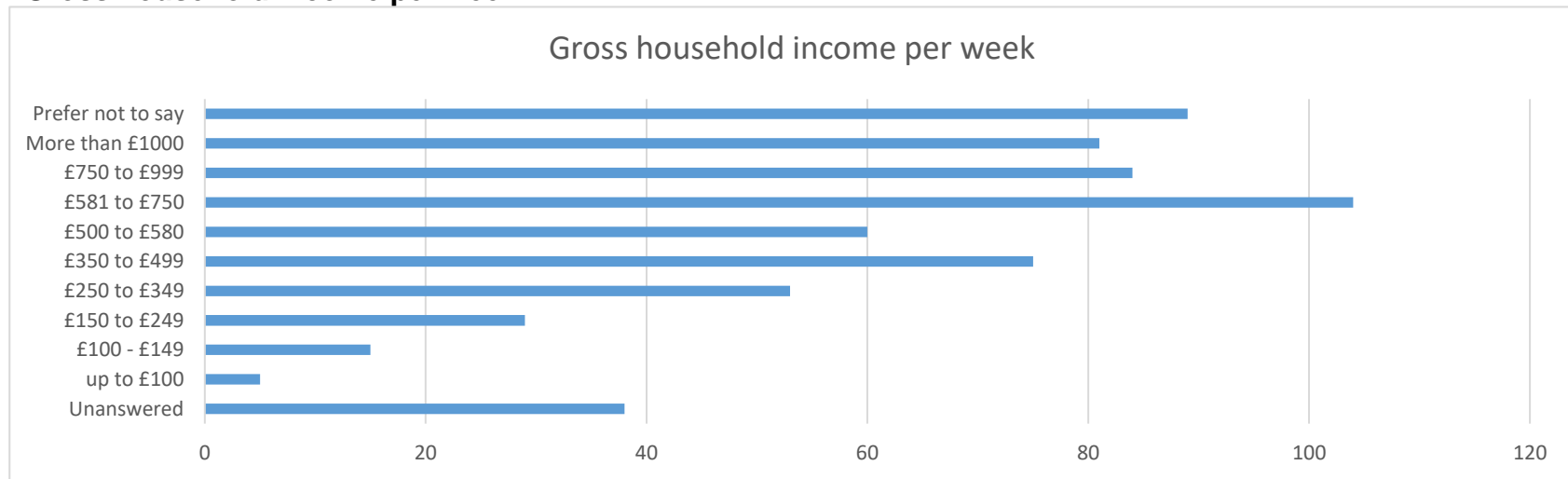
**Q. What is your gross household income per week (before deductions/tax)? Please add together the incomes of yourself, your partner and anyone else who lives with you. In addition to wage or salary income, don't forget to include any benefits you receive, income from savings and investment, and any other sources of income.**

**Table 13.3: Household income:**

Gross household income per week	Number	Annual household income
Unanswered	38	Unanswered
up to £100	5	up to £5200
£100 - £149	15	£5200 - £7748
£150 to £249	29	£7800 - £12948
£250 to £349	53	£13000 - £18148
£350 to £499	75	£18200 - £52948
£500 to £580	60	£26000 - £30160
£581 to £750	104	£30212 - £39000
£750 to £999	84	£39000 - £51948
More than £1000	81	More than £52000
Prefer not to say	89	Prefer not to say



**Figure 13.4: Gross household income per week:**

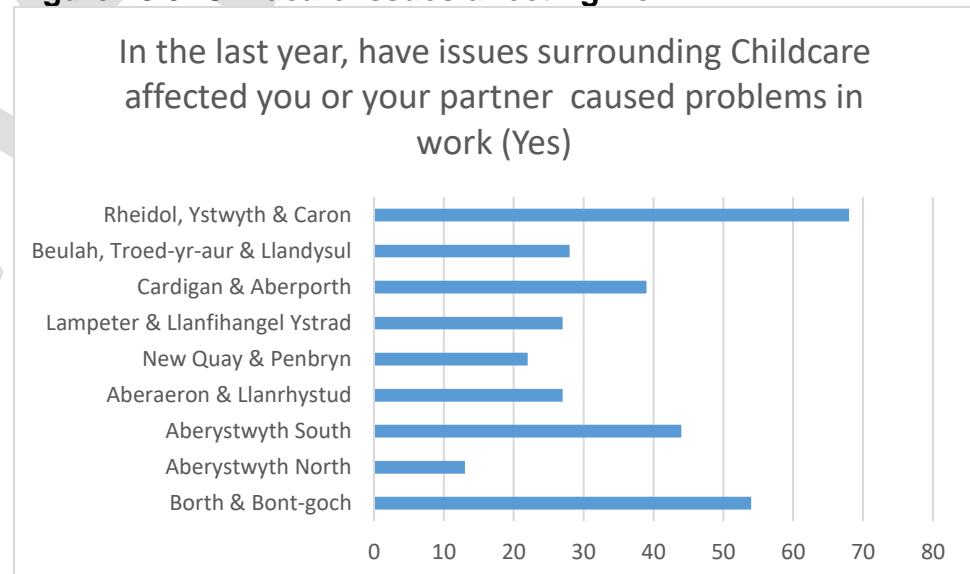


- Just over 100 respondents reported that their weekly household income was between £581 and £750 before deductions. 5 responded that their weekly income was up to £100 per week.

**Table 13.4: Childcare issues affecting work:**

In the last year, have issues surrounding Childcare affected you or your partner (if applicable) in any of the following ways (tick all that apply):	Yes
Caused problems at work	337
Prevented Continuation of work	146
Stopped you working/getting a job	147
Stopped you from training	130
Other (please explain):	60

**Figure 13.5: Childcare issues affecting work**



- 337 respondents reported that Childcare had caused problems at work, with a further 147 reporting it stopped them from working or getting a job. 146 reported that Childcare issues had prevented them from continuing to work.
- The graph above highlights that the majority of issues around Childcare were highlighted in the Rheidol, Ystwyth and Caron, Borth and Bontgoch and Aberystwyth South MSOA's.

When asked for feedback regarding Childcare issues, responses are included below. Most concerning were the comments from parents who stated that lack of Childcare affected their working hours and income; and affordability issues:

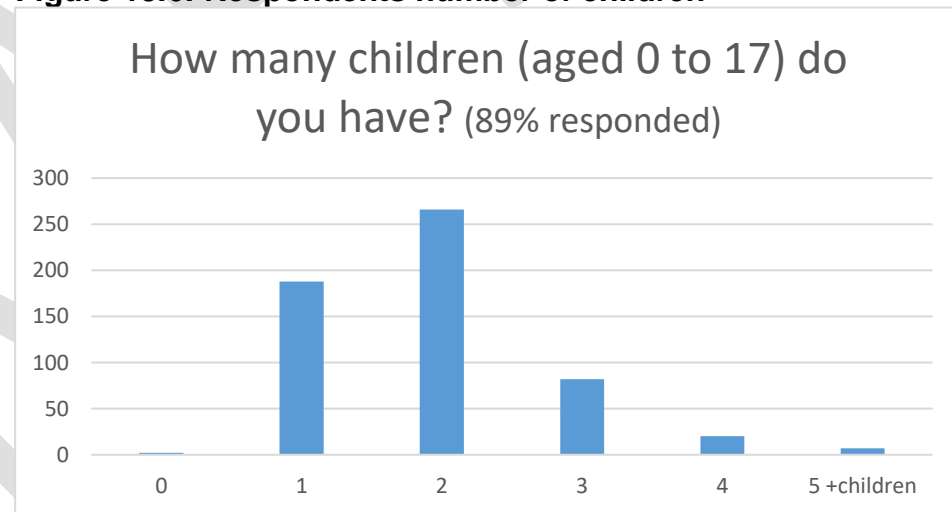
- *“Nothing available so cut my hours”*
- *“I would if there were some available so I could work more”*
- *“Take him to work because I can't afford Childcare”*
- *“My kids' dad luckily isn't working so he has them around school hours while I'm working as if he was working, I'd have to give up work because of lack of Childcare”*
- *“I have had to & currently am, having to miss classes for MA due to lack of Childcare.”*
- *“Previous employment had issue with my Childcare arrangements. I have since changed employer - taking a paycut”*
- *“It doesn't look good having to take your child to work with you”*
- *“Partner self-employed so has lost hours at work when there has been no Childcare”*
- *“Problemau cyrraedd gwaith ar amser. Trefnu rhywun i fynd ar plant i'r ysgol a casglu plant am 3.30 achos does dim clybiau wedi bod”*
- *“Have to split our leave so that we are not off at the same time during the school holidays”*
- *“No after school club available. Parents are lecturers and health team leads so have to be in work. No after school club is having a very detrimental effect on working.”*
- *“Had to cut down my hours as after school hasn't re opened since Covid and not going to do”*
- *“My employer is very understanding but school Childcare provisions have not returned to pre Covid level and it's unacceptable in supporting hardworking parents who do not receive benefits”*
- *“After school club closed until further notice due to staff shortage. We were told 2 weeks before school returned after summer holidays. We have had to reduce our working hours and change working contracts to accommodate this shortfall”*
- *“During pandemic me and husband worked for the NHS we could not work our contracted hours”*
- *“During the pandemic it was very difficult to juggle work commitments with Childcare”*
- *“It is difficult to juggle work and Childcare as paid nursery is the only option, friends and family unable to help with small child. But cost is an issue with full time Childcare, although standard of Childcare is excellent.”*

- *“My partner was unable to work until recently due to the cost of nursery fees (as a non-worker, we couldn't get the money to pay for Childcare to allow him to work in order to get the benefits for 3-4yr olds)”*
- *“Cost of child care means a lot of juggling to between us to keep costs as low as possible to actually benefit from working. Childcare for 3 under 3 is very expensive. But due to my wages we don't qualify for UC”*
- *“Both my partner and I were key workers, yet Childcare was still very limited so had to rely on other family”*
- *“Could not accept a place at University as no after school Childcare available all week or until 6pm, only 3 days a week and until 4.30pm not 6pm”*
- *“Closed schools and isolating makes it hard to have kids at home and also work at the same time”*

**Table 13.5: Respondents number of children**

How many children (aged 0 to 17) do you have?	No. of responses	Total No. of children
Not answered	68	-
0	2	0
1	188	188
2	266	532
3	82	246
4	20	80
5 + children	7	41
	<b>633</b>	<b>1087</b>

**Figure 13.6: Respondents number of children**

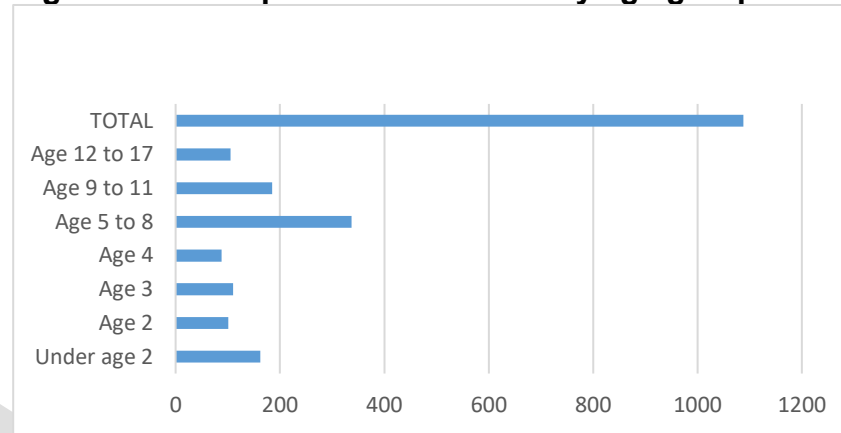


- 188 respondents had at least one child aged 0-17, with the highest number of respondents (288) reporting they had two children.

**Table 13.6: Respondents' children by age group**

Age	Number
Under age 2	162
Age 2	101
Age 3	110
Age 4	88
Age 5 to 8	337
Age 9 to 11	185
Age 12 to 17	105
<b>TOTAL</b>	<b>1088</b>

**Figure 13.7: Respondents' children by age group**



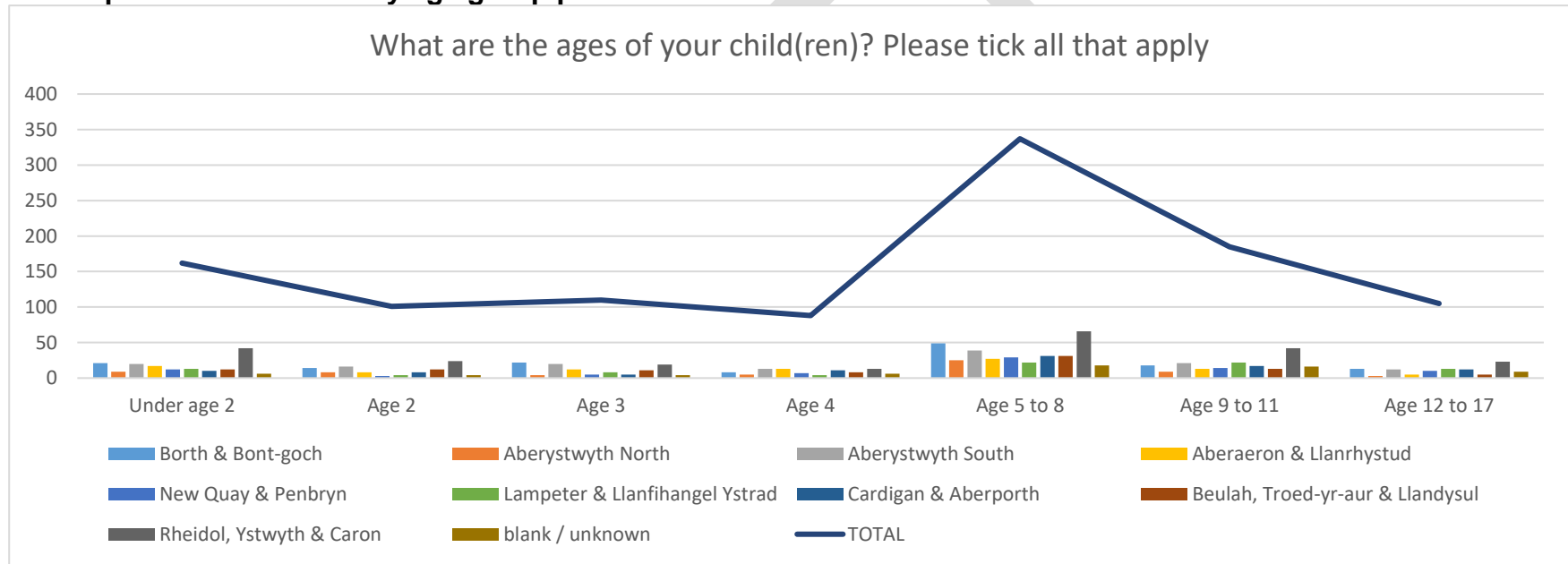
- 337 respondents reported having a child 5 to 8 years old, and 185 with a child 9 to 11 years old. A high percentage of the respondents had children of school age. 162 respondents had a child under the age of 2. The main concerns highlighted was after school provision.

**Table 13.7: Respondents' children by age group per MSOA:**

	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yraur & Llandysul	Rheidol, Ystwyth & Caron	Unknown	TOTAL
Under age 2	21	9	20	17	12	13	10	12	42	6	<b>162</b>
Age 2	14	8	16	8	3	4	8	12	24	4	<b>101</b>
Age 3	22	4	20	12	5	8	5	11	19	4	<b>110</b>
Age 4	8	5	13	13	7	4	11	8	13	6	<b>88</b>

Age 5 to 8	49	25	39	27	29	22	31	31	66	18	<b>337</b>
Age 9 to 11	18	9	21	13	14	22	17	13	42	16	<b>185</b>
Age 12 to 17	13	3	12	5	10	13	12	5	23	9	<b>105</b>
<b>TOTAL</b>											<b>1088</b>

**Figure 13.8: Respondents' children by age group per MSOA**

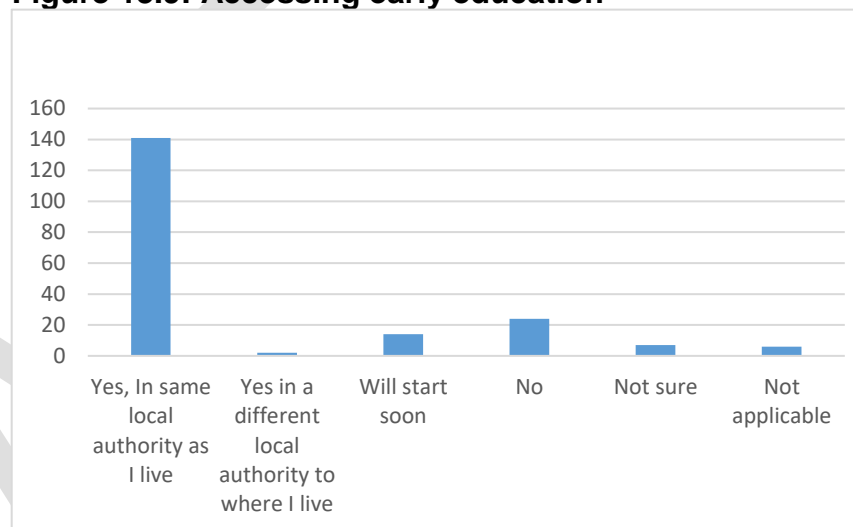


## Welsh Government Funded Services

**Table 13.8: Accessing early education**

Q. Is your child(ren) age 3 or 4 accessing funded early education place at school or nursery?	Total
Yes, In same local authority as I live	141
Yes in a different local authority to where I live	2
Will start soon	14
No	24
Not sure	7
Not applicable	6
<b>TOTAL</b>	<b>194</b>

**Figure 13.9: Accessing early education**



- 141 respondents reported accessing the funded early education place at school or nursery within the local authority they live which represents 25% of 3 year old children accessing FPN as recorded in PLASC data Autumn 2021..

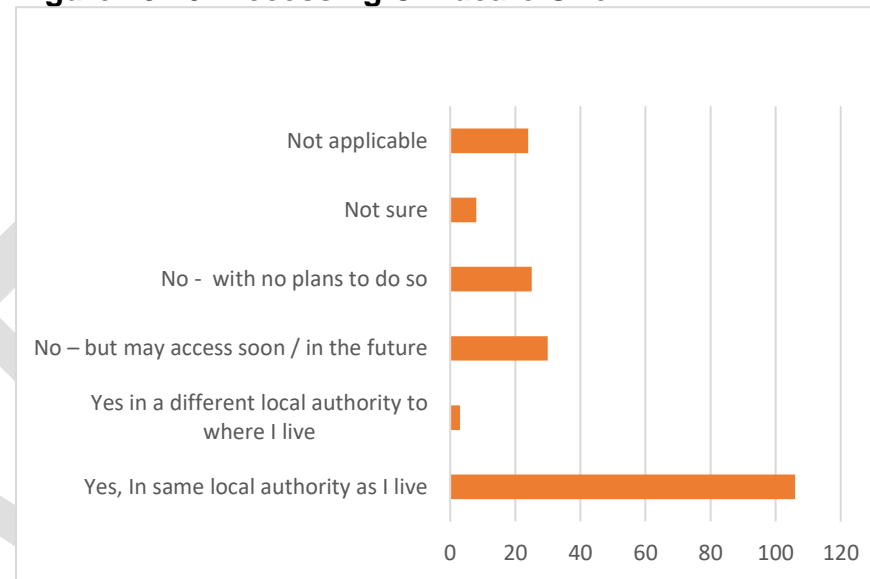
### If choose not to, why?

- *Because I don't know how to apply to the school I want my child to attend*
- *Due to lockdown and Ceredigion council applying stricter rules on reopening, I am not able to attend nursery or toddler groups with my child in order to help them get used to the new situation. I feel it is a big jump from being with a parent 24/7 to being left alone in a new place.*
- *Gets the 10 hours but have applied for the 30hrs as husband is self-employed and it's difficult to get the paper work to complete the form.*

**Table 13.9: Accessing Childcare Offer**

Q. Is your age 3 or 4 year old child(ren) accessing government funded Childcare (the Childcare Offer)?	Total
Yes, In same local authority as I live	106
Yes in a different local authority to where I live	3
No – but may access soon / in the future	30
No - with no plans to do so	25
Not sure	8
Not applicable	24
<b>TOTAL</b>	<b>196</b>

**Figure 13.10: Accessing Childcare Offer**



- 109 respondents reported that they are already taking up the offer in the authority in which they live or in a neighbouring authority.
- 25 had no plans to take up the offer.
- From the parents that had children aged 2, 93 responded that they wished to access the Childcare Offer. Of those that were not going to access it the following reasons were given:

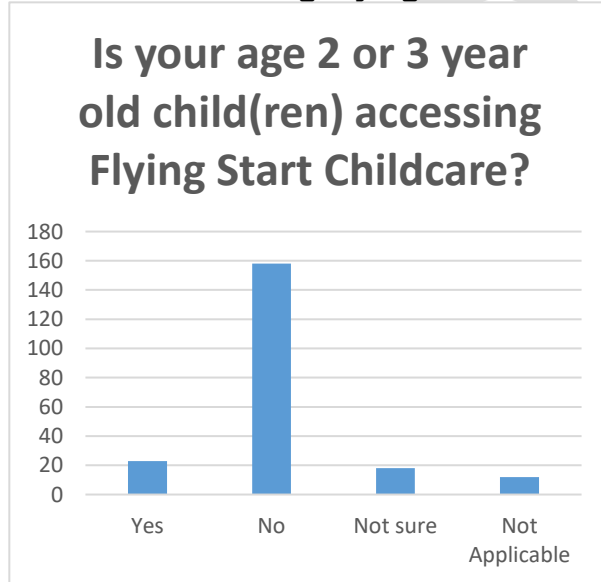
- *“The Childcare offer does not benefit parents, it is advertised as free Childcare but this is not the case as private nurseries increase the cost of Childcare for children eligible for this offer.”*
- *“May not be working enough hours-should lower threshold to encourage all women to go back to work”*
- *“My son turns 3 in November so will be able to apply from January. However my wife is a full time student. I work full time and we do not therefore qualify. We do not get any help with Childcare and think that this is unfair. Being a full time student should be seen as equivalent to working the 16 hours and we should therefore qualify. This really needs to be looked at”*

Parents of 3 year olds gave the following reasons for not accessing the offer:

**If choose not to, why?**

- “There are not enough suitable nurseries in the area having worked in early years for 20 years I find the standard in Ceredigion is very poor.”
- “I’m looking for a part time job (12) hours a week but then wondering what the point is because I wouldn’t be able to get the 30 hours of free Childcare if I work under 16 hours a week. I still want to go back to work to help my mental health but would have to pay for Childcare afterwards and my salary (and more) would go on that and couldn’t afford to. The guidelines need to change (minimum hours reduced)”
- “Receive Child Tax credits, which cover 52 weeks a year versus less weeks with Childcare offer. 3 yr old starts school full time soon”
- “I am not in full time employment so not entitled”
- “No places available due to lack of spaces in Childcare”

**Table 13.10: Accessing Flying Start Childcare**



**Figure 13.11: Accessing Flying Start Childcare**

Unable to access/not in area/not eligible	Do not know about it	Going to use it	Used it but unhappy	Other
22	16	3	1	3

Many parents were aware that they were not in a Flying Start area and therefore not eligible. Some were not aware of Flying Start, but they were generally not in Flying Start areas, so would not have been targeted with the information.

*Wasn’t provided the option, would have accessed it if it was fair for all families, not down to postcode alone, this should be changed*

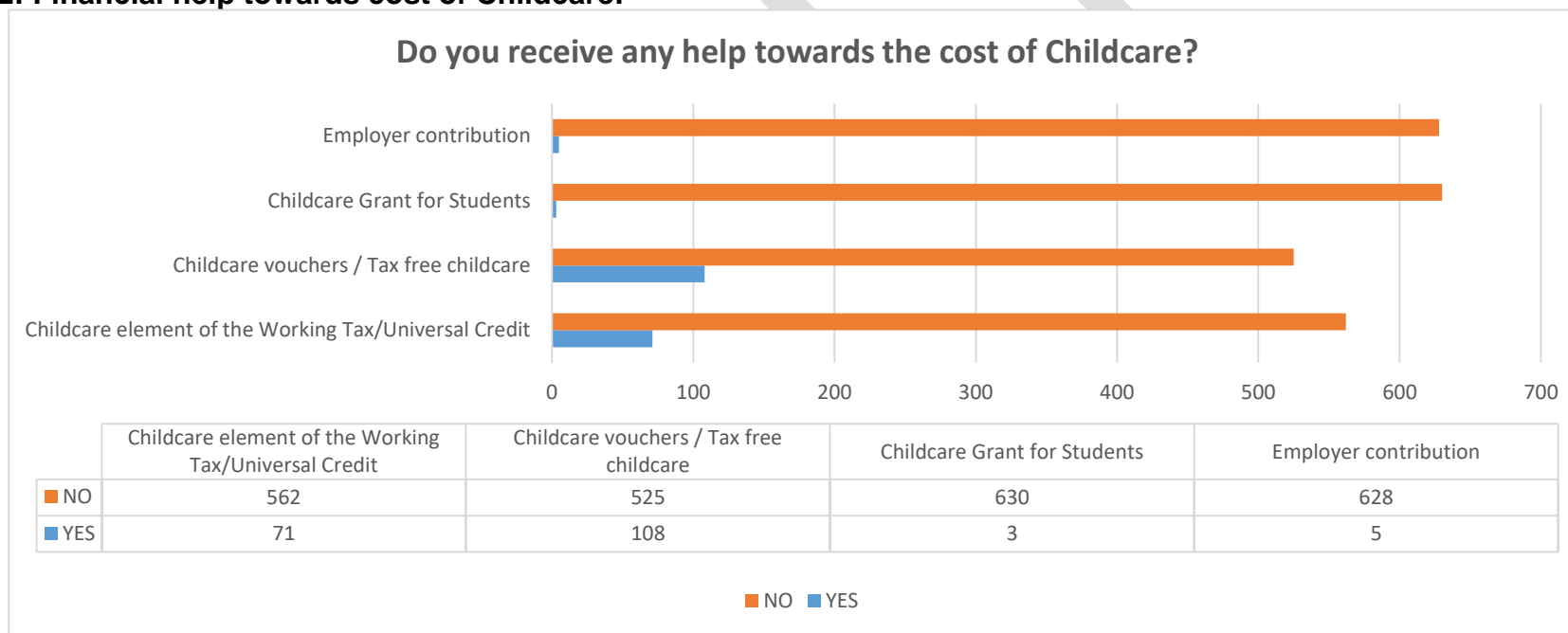


Further parent feedback on Flying Start is included in ANNEX 1

Some parents may not know of different schemes until they actually start attending Childcare:  
*I'm not sure what this means? my two year old starts Meithrin in January I therefore pay for her!*  
*What's that? Me and my partner work so i assume we are not eligible for help*

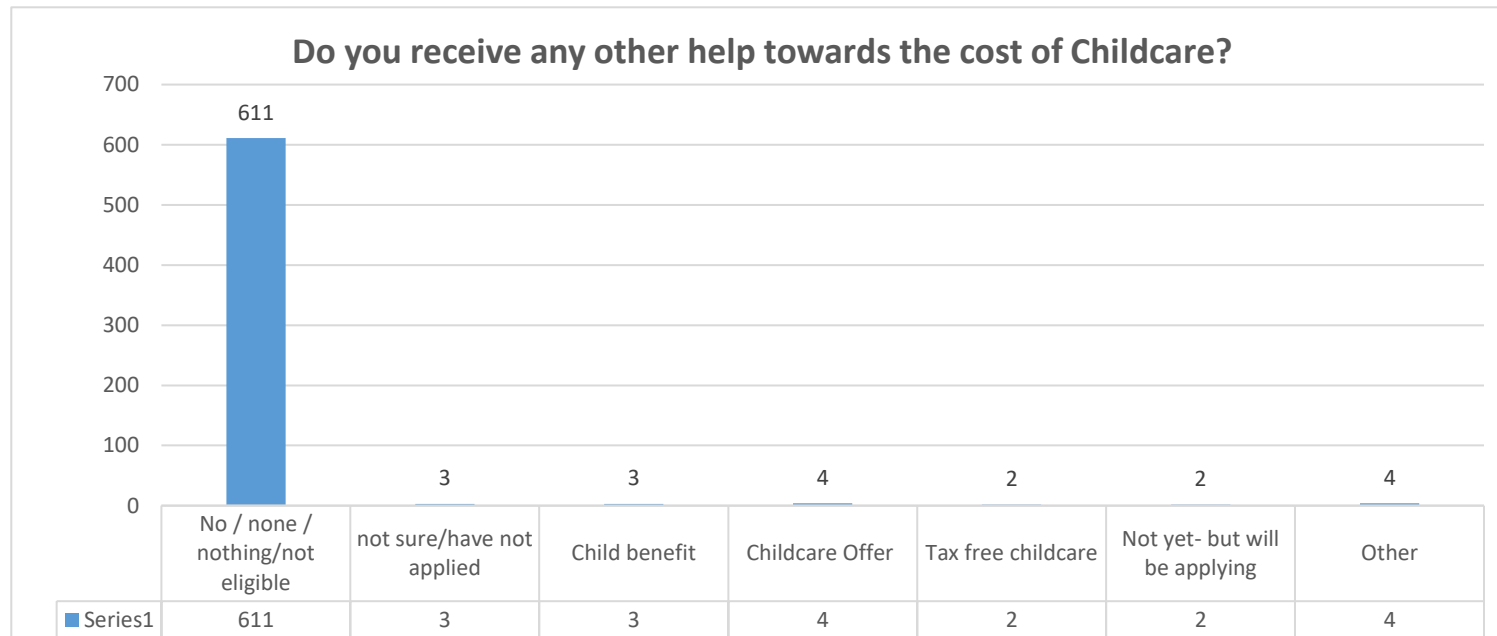
**Financial Support for parents:**

**Figure 13.12: Financial help towards cost of Childcare:**



- 71 reported they are receiving the Childcare element of Working Tax Credit / Universal Credit, with 108 using Childcare vouchers or the Tax-free Childcare scheme.
- Take up for financial support is low when compared with the number of respondents accessing Childcare.

**Figure 13.13: Other help towards cost of Childcare:**



The Family Information Service continues to promote help with Childcare costs. All providers are encouraged to register with HMRC in order that parents can access the Tax-free Childcare scheme with them. More work is needed to promote the scheme. The Childcare webpages on the Ceredigion County Council website is also regularly updated [Help and Support with Childcare - Ceredigion County Council](#)

Respondents with children who have special educational needs or disability

**Table 13.11: Children with a disability or a long-term illness**

<b>Do any of your children have a disability or a long-term illness?</b>	
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**Table 13.12: Children who need additional support with their learning**

<b>Do any of your children have a special education need / additional learning need (they need additional support with their learning)?</b>	
---	--

Yes	41
No	582
Prefer not to say	5

Yes	79
no	537
Prefer not to say	9

#### 14 CURRENT USE OF CHILDCARE

**Table 14.1: Current use of all types of Childcare – Term Time per MSOA:**

Do you currently use any of the following types of Childcare or early education DURING TERM TIME	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	Unknown	Total
Childminder	5	2	7	8	9	9	16	16	8	6	86
Before School Club/Breakfast Club	29	8	14	13	13	12	21	15	37	11	173
After School Club	28	8	13	8	8	6	3	4	27	2	107
Private Day Nursery	22	7	20	12	1	7	4	5	29	2	109
School Nursery	5	3	7	3	0	0	2	3	5	2	30
Playgroup	4	5	3	0	1	1	3	2	1	1	21
Cylch Meithrin	22	2	11	10	6	8	8	14	27	4	112
Drop Off Crèche	0	0	0	0	0	1	1	0	1	0	3

Nanny	0	0	1	0	0	0	0	1	1	0	3
Au Pair	0	0	0	0	0	0	0	0	0	1	1
Family / friends (paid)	7	2	2	1	8	3	4	1	3	1	32
Family / friends (unpaid)	41	17	35	25	25	23	30	22	63	17	298
None During Term Time	11	5	10	6	5	8	5	8	18	2	78
Other (please explain): 37 Other comments	4	4	4	3	3	3	4	8	3	1	37
<b>TOTAL</b>	<b>178</b>	<b>63</b>	<b>127</b>	<b>89</b>	<b>79</b>	<b>81</b>	<b>101</b>	<b>99</b>	<b>223</b>	<b>50</b>	<b>1090</b>

- The reliance upon non-formal Childcare remains to be the highest from the responses with 298 reporting that they use family/friends (unpaid).
- With Breakfast Club being the second highest choice of Childcare used by 173 respondents. Caution must be taken here as it is likely that this is the free provision available through schools and not in registered Childcare provision.
- 112 respondents accessed a Cylch Meithrin.

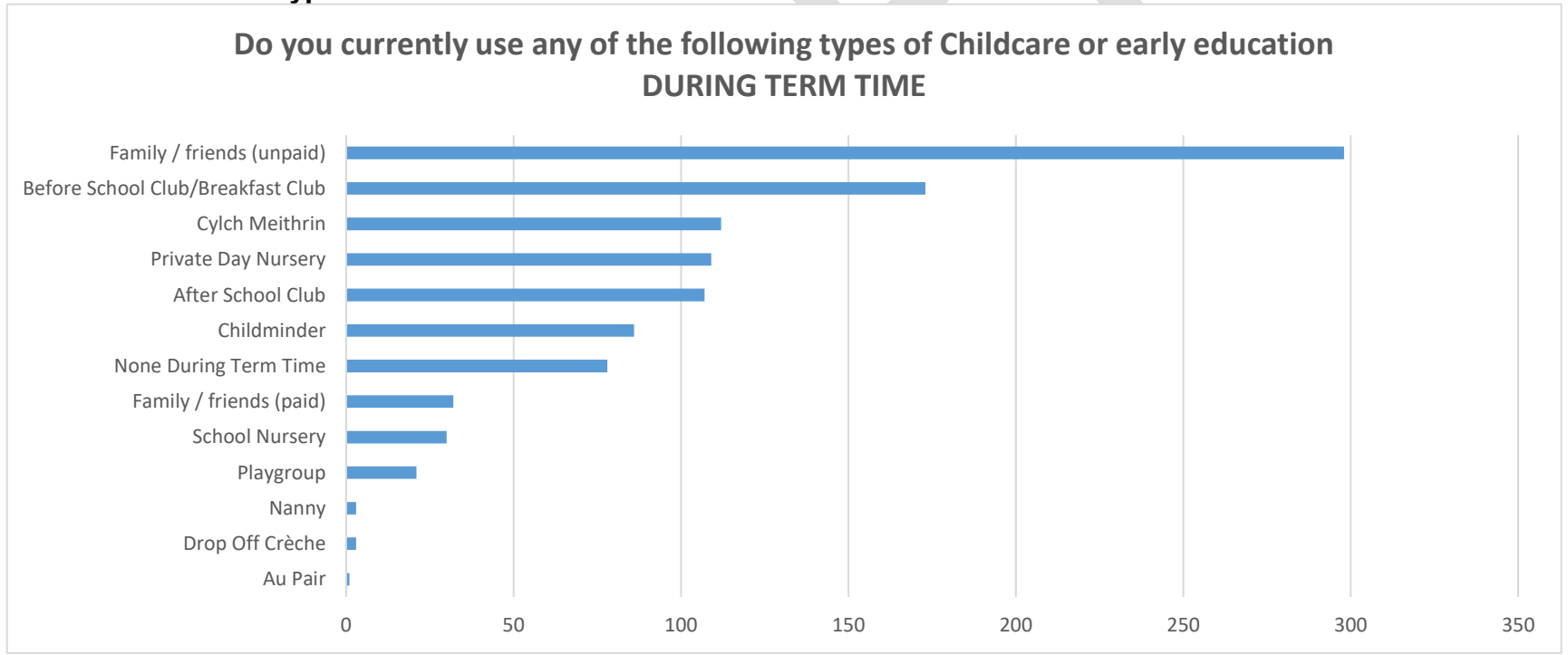
**Table 14.2: Current use of all types of Childcare – School Holidays per MSOA**

<b>Do you currently use any of the following types of Childcare or early education DURING SCHOOL HOLIDAYS? (Please tick all that apply):</b>	<b>Borth &amp; Bont-goch</b>	<b>Aberystwyth North</b>	<b>Aberystwyth South</b>	<b>Aberaeron &amp; Llanrhystud</b>	<b>New Quay &amp; Penbryn</b>	<b>Lampeter &amp; Llanfihangel Ystrad</b>	<b>Cardigan &amp; Aberporth</b>	<b>Beulah, Troed-yr-aur &amp; Llandysul</b>	<b>Rheidol, Ystwyth &amp; Caron</b>	<b>Unknown</b>	<b>Total responded Yes</b>
Childminder	6	2	5	6	7	5	14	16	8	7	76
Holiday Care	21	9	7	4	0	1	1	1	17	0	61
Private Day Nursery	21	5	19	13	1	8	4	6	29	1	107
Pre-Prep (Private) School	0	0	0	0	0	0	0	0	0	0	0
Playgroup	2	1	0	1	0	1	1	0	3	0	9
Cylch Meithrin	2	0	3	1	1	1	0	0	1	0	9
Drop Off Crèche	0	0	0	1	0	1	1	0	0	0	3
Nanny	0	0	1	0	0	0	0	1	2	1	5
Au Pair	0	0	0	0	0	0	0	0	0	0	0
Playscheme	2	1	3	2	1	2	0	0	2	2	15
Family / Friends (paid)	7	2	4	1	9	1	8	1	3	4	40
Family / Friends (not paid)	45	16	38	27	24	20	30	20	71	15	306

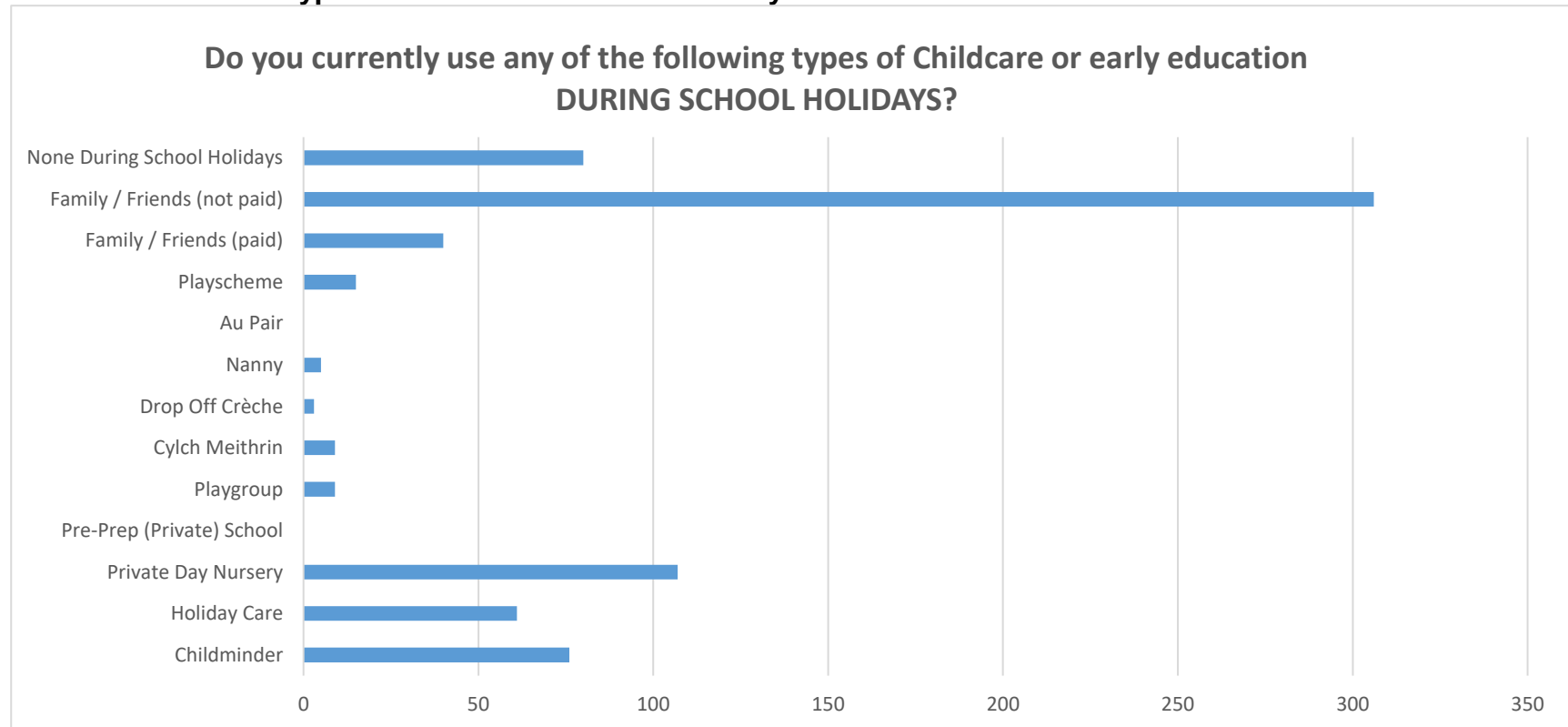
None During School Holidays	8	6	12	4	6	7	7	5	18	7	80
<b>TOTAL</b>	<b>114</b>	<b>42</b>	<b>92</b>	<b>60</b>	<b>49</b>	<b>47</b>	<b>66</b>	<b>50</b>	<b>154</b>	<b>37</b>	<b>711</b>

- The reliance for family and friends remains to be the most popular choice for Childcare during the holidays with 306 respondents.
- 107 reported using a Private Day Nursery.

**Figure 14.1: Current use of all types of Childcare – Term Time**



**Figure 14.2: Current use of all types of Childcare – School Holidays:**



Parents expressed concern with regard to lack of After School Clubs or childminders:

- *“After school club in Ysgol Bro Teifi is not running. I would use it and need to”*
- *“I would use after school club if we had one. Very upset that we haven’t.”*
- *“Limited after school club at normal times. There has been no pre-school or after school clubs since the first CV19 lock-down”*
- *“No after school available and no availability with childminders”*

- *“Our usual after school club provider has not been able to run sessions since September 2021 due to staff shortages and seems to have difficulties to recruit appropriate personnel to re-instate the club. We are therefore have to collect our children and care for them after 3pm every day, meaning some work has to take place in the evenings, etc.”*
- *“We don't have access to any after school clubs in our area. This service stopped just before the beginning of the school term due to issues with staffing. The provision for after school clubs is non-existent making it very difficult for working parents.”*
- *“None as there is no Childcare in cardigan except for childminders. Who are all completely full”*

### **Childcare Hours used**

The Parent/Carer survey asked parent on their average hours used per week of any form of Childcare. The survey allowed for parents to input hours and the vast variations were challenging to analyse. Hours used ranged from 1 to 50+.

For future surveys it would be advisable to provide options for parents to choose from a set range of hours, and to allow for hours per child to be recorded for parents with more than one child using Childcare. From the responses to the survey we can see that parents continue to rely on part-time provision with the average number of hours during term time being 19 and during the holidays 26 hours.

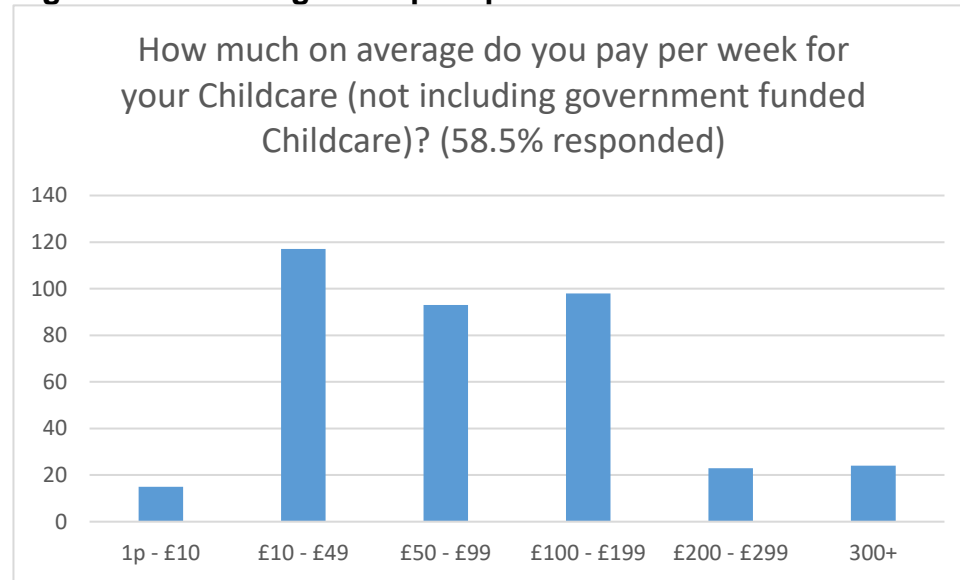
Therefore these figures are not statistically correct as we applied an ‘average hours used’ manually.

**Table 14.3: Average Childcare Hours used:**

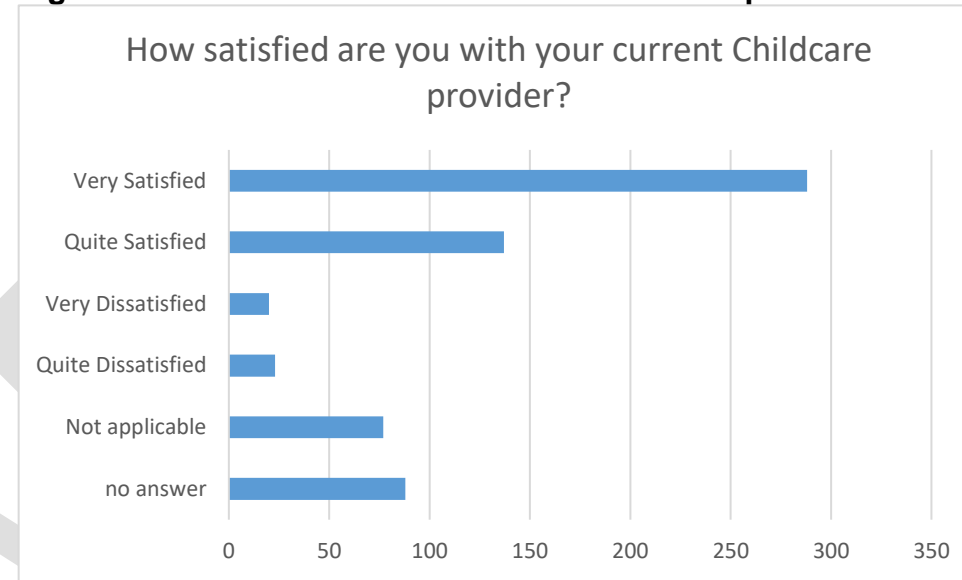
<b>Average Childcare Hours used</b>	<b>Average</b>
During term time?	19
During school holidays?	26



**Figure 14.3: Average fees paid per week for Childcare**

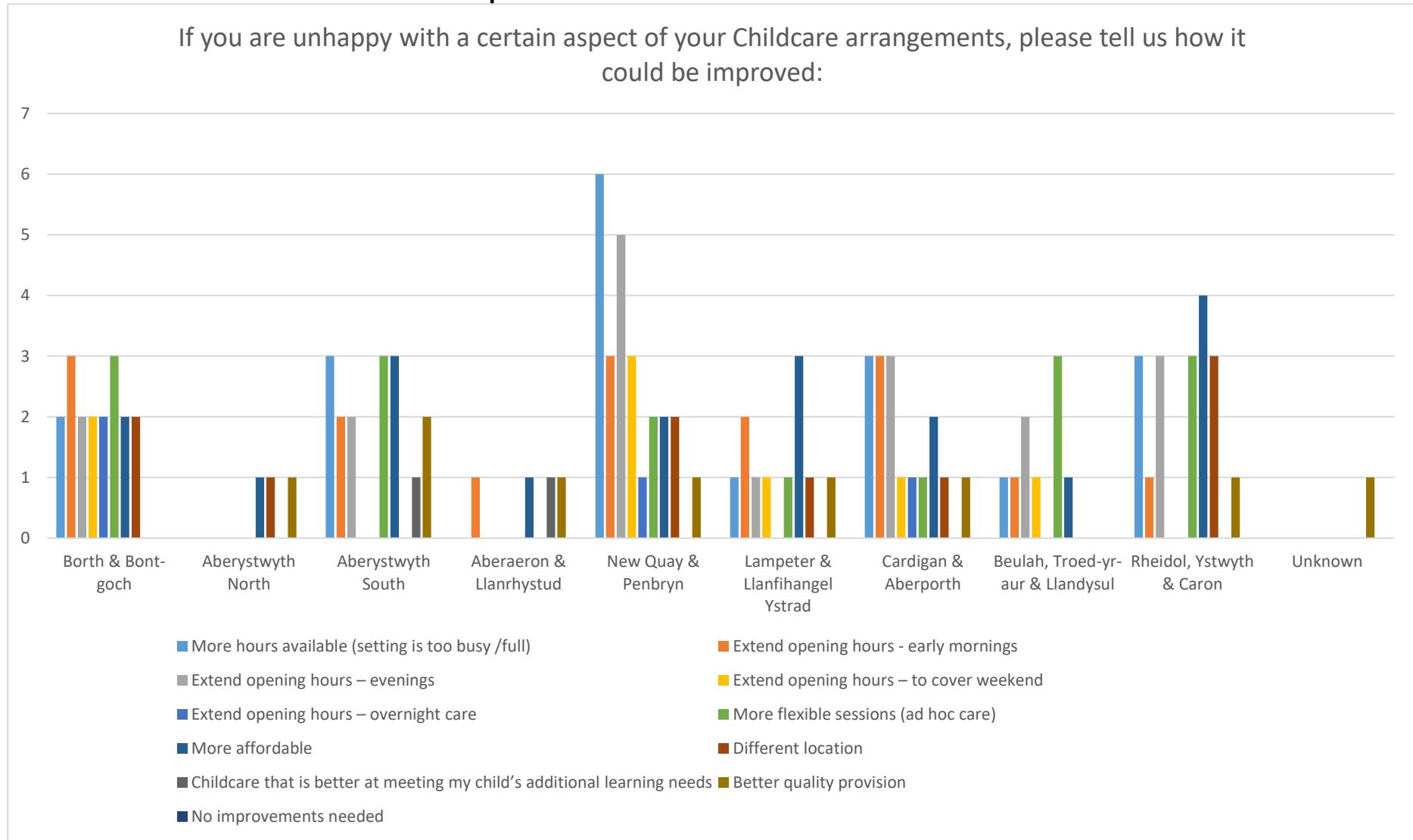


**Figure 14.4: Satisfaction with current Childcare provider**



- 118 respondents reported paying between £10 and £49 per week for Childcare with just under a 100 paying between £100 and £199.
- The majority of respondents were happy with their current Childcare provider. There were regional differences with regard to demand for certain services e.g. demand for evening and weekends was high in some areas, or that settings were too busy or full to offer all hours required. Caution must be taken as the figures may not be representative of the actual provision available, but will be used with other available information before drawing any conclusions.

**Figure 14.5: How current Childcare could be improved:**



**Table 14.4: How current Childcare could be improved:**

If you are unhappy with a certain aspect of your Childcare arrangements, please tell us how it could be improved:	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	Unknown
More hours available (setting is too busy /full)	2		3		6	1	3	1	3	
Extend opening hours - early mornings	3		2	1	3	2	3	1	1	
Extend opening hours – evenings	2		2		5	1	3	2	3	
Extend opening hours – to cover weekend	2				3	1	1	1		
Extend opening hours – overnight care	2				1		1			
More flexible sessions (ad hoc care)	3		3		2	1	1	3	3	
More affordable	2	1	3	1	2	3	2	1	4	
Different location	2	1			2	1	1		3	
Childcare that is better at meeting my child’s additional learning needs			1	1						
Better quality provision		1	2	1	1	1	1		1	1
No improvements needed										
<b>TOTAL</b>	<b>18</b>	<b>3</b>	<b>16</b>	<b>4</b>	<b>25</b>	<b>11</b>	<b>16</b>	<b>9</b>	<b>18</b>	<b>1</b>

- The response rate was relatively low when asked if you are unhappy with a certain aspect of your Childcare arrangements, how could it be improved which could reflect on the whole respondents are happy.
- Most responses (25) were from the New Quay and Penbryn MSOA, where suggestions were made for more hours (6), extended opening hours (5) and more affordable provision (2).

**Access to Childcare:**

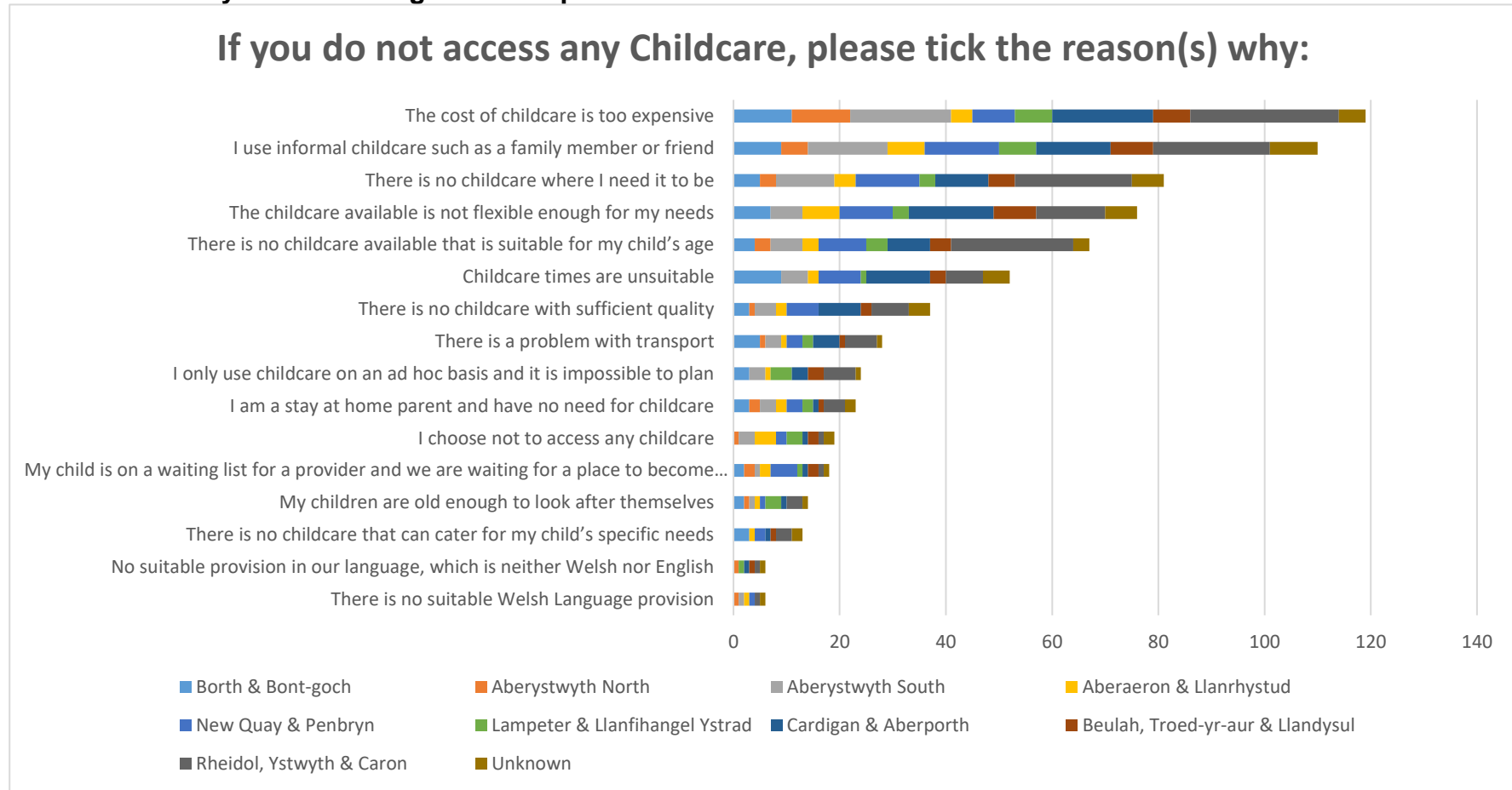
**Table 14.4: Reasons why not accessing childcare per MSOA**

<b>If you do not access any Childcare, please tick the reason(s) why:</b>	<b>Borth &amp; Bont-goch</b>	<b>Aberystwyth North</b>	<b>Aberystwyth South</b>	<b>Aberaeron &amp; Llanrhystud</b>	<b>New Quay &amp; Penbryn</b>	<b>Lampeter &amp; Llanfihangel Ystrad</b>	<b>Cardigan &amp; Aberporth</b>	<b>Beulah, Troed-yr-aur &amp; Llandysul</b>	<b>Rheidol, Ystwyth &amp; Caron</b>	<b>Unknown</b>	<b>TOTAL</b>
My child is on a waiting list for a provider and we are waiting for a place to become available	2	2	1	2	5	1	1	2	1	1	18
I use informal Childcare such as a family member or friend	9	5	15	7	14	7	14	8	22	9	110
I choose not to access any Childcare	0	1	3	4	2	3	1	2	1	2	19
I am a stay at home parent and have no need for Childcare	3	2	3	2	3	2	1	1	4	2	23
My children are old enough to look after themselves	2	1	1	1	1	3	1	0	3	1	14
There is no Childcare with sufficient quality	3	1	4	2	6	0	8	2	7	4	37
There is no suitable Welsh Language provision	0	1	1	1	1	0	0	0	1	1	6
No suitable provision in our language, which is neither Welsh nor English	0	1	0	0	0	1	1	1	1	1	6

The Childcare available is not flexible enough for my needs	7	0	6	7	10	3	16	8	13	6	76
The cost of Childcare is too expensive	11	11	19	4	8	7	19	7	28	5	119
Childcare times are unsuitable	9	0	5	2	8	1	12	3	7	5	52
There is no Childcare available that is suitable for my child's age	4	3	6	3	9	4	8	4	23	3	67
There is a problem with transport	5	1	3	1	3	2	5	1	6	1	28
There is no Childcare where I need it to be	5	3	11	4	12	3	10	5	22	6	81
There is no Childcare that can cater for my child's specific needs	3	0	0	1	2	0	1	1	3	2	13
I only use Childcare on an ad hoc basis and it is impossible to plan	3	0	3	1	0	4	3	3	6	1	24
Other (please explain):	6	5	4	6	4	4	4	8	8	2	51
<b>TOTAL</b>	<b>72</b>	<b>37</b>	<b>85</b>	<b>48</b>	<b>88</b>	<b>45</b>	<b>105</b>	<b>56</b>	<b>156</b>	<b>52</b>	<b>744</b>

- When asked what the reason was for not using Childcare most responded that it was too expensive (119,) and 110 identified that they use family and friends is generally free or more accessible for parents
- 81 respondents reported that there was no Childcare where they needed it to be. The Rheidol, Ystwyth & Caron; New quay & Penbryn; and Aberystwyth South were highlighted as the top three MSOA's with no Childcare available.
- 67 said there was no Childcare available that was suitable for child's age - again this was identified in the Rheidol, Ystwyth and Caron area.
- 52 said Childcare times were unsuitable. This was most noticeable in the Cardigan and Aberporth MSOA.

**Figure 14.6: Reasons why not accessing childcare per MSOA**



**If you do not access any Childcare, please tick the reason(s) why:**

- *“I use Childcare when it is available. School holidays are very difficult as there isn't always Childcare available and with no family living nearby I have to rely on friends which is not always appropriate”*
- *“We would like to use an after school club for both children on four days a week but our usual provider currently suffers from staff shortages and can't provide this. All other possible providers have no free places.”*
- *“No Childcare available for older children and school holidays”*

- *“Since Covid there has been no after school child care provision at school, where as there use to be a very good service available. Also, although breakfast club has returned since Covid it is limited to pre booking day before.”*
- *“Affordability: I am a childminder but I feel that my choices of work were greatly reduced due to cost of Childcare and so had to choose something that fit around my children”*

**Some parents reported that they did not need to use Childcare:**

- *“I work part time by choice to enjoy my children’s youth. My partner works flexible hours and is able to collect the children on the 2 days a week I am unavailable.”*
- *“No need as working hours suit around school drop off an pick-up”*
- *“I work within the school hours so do not need additional Childcare as it stands.”*
- *“I work nights and my partner works days so no child care”*
- *“Our jobs allow us not to have child care, only use family when child is ill”*
- *“My partner is a stay at home parent so we don’t need to use Childcare*

**Table 14.5: Statements of satisfaction with Childcare used**

<b>Thinking about all the Childcare you use for your children, or are aware of, how much do you agree with the following statements:</b>	<b>Tend to Agree</b>	<b>Strongly Agree</b>	<b>Tend to Disagree</b>	<b>Strongly Disagree</b>
I am satisfied with my Childcare in term time	160	254	59	65
I am satisfied with my Childcare in school holidays	134	153	99	87
The quality of Childcare is high	191	268	32	21
There is a good choice of Childcare in my area	126	57	170	224
Childcare is well located	191	134	121	124
Childcare caters for my children’s needs	188	202	47	71
I would like my child to attend more registered Childcare	149	169	73	28
Childcare is too expensive	172	307	59	12

I would prefer to use family/friends for Childcare	126	96	182	75
I have a problem with Childcare arrangements that are unreliable (eg. cancel sessions at short notice)	48	41	94	158
Childcare is a barrier to me accessing employment or training	147	160	73	79
I know where to find out information about Childcare	231	120	161	67
I know where to find out info on financial assistance for Childcare	178	71	178	138

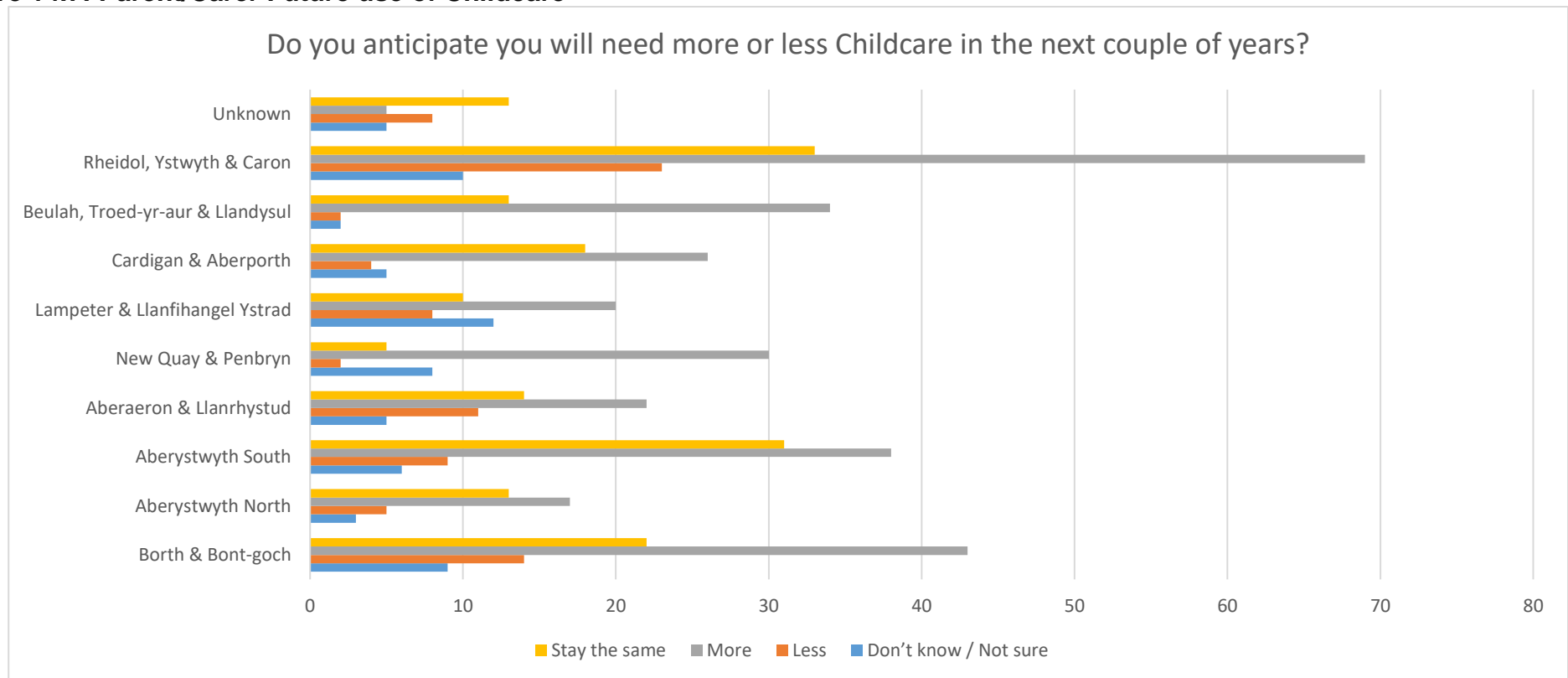
- 254 strongly agree that they are satisfied with the Childcare during term time yet 65 strongly disagree. However, this is reduced during the holidays with only 153 respondents saying 'strongly agree' with the Childcare in the holidays.
- 268 strongly agree that the quality of Childcare is high in Ceredigion.
- When asked if there was a good choice of Childcare, 224 respondents strongly disagreed with this statement which highlights the gap we have in type of provision available.
- As already highlighted in this report the cost of Childcare remains to be an issue as (307) strongly agreed that Childcare is expensive.
- When asked "I know where to find information about Childcare" 231 respondents said "tend to agree" whilst 161 "tend to disagree".

DRAFT



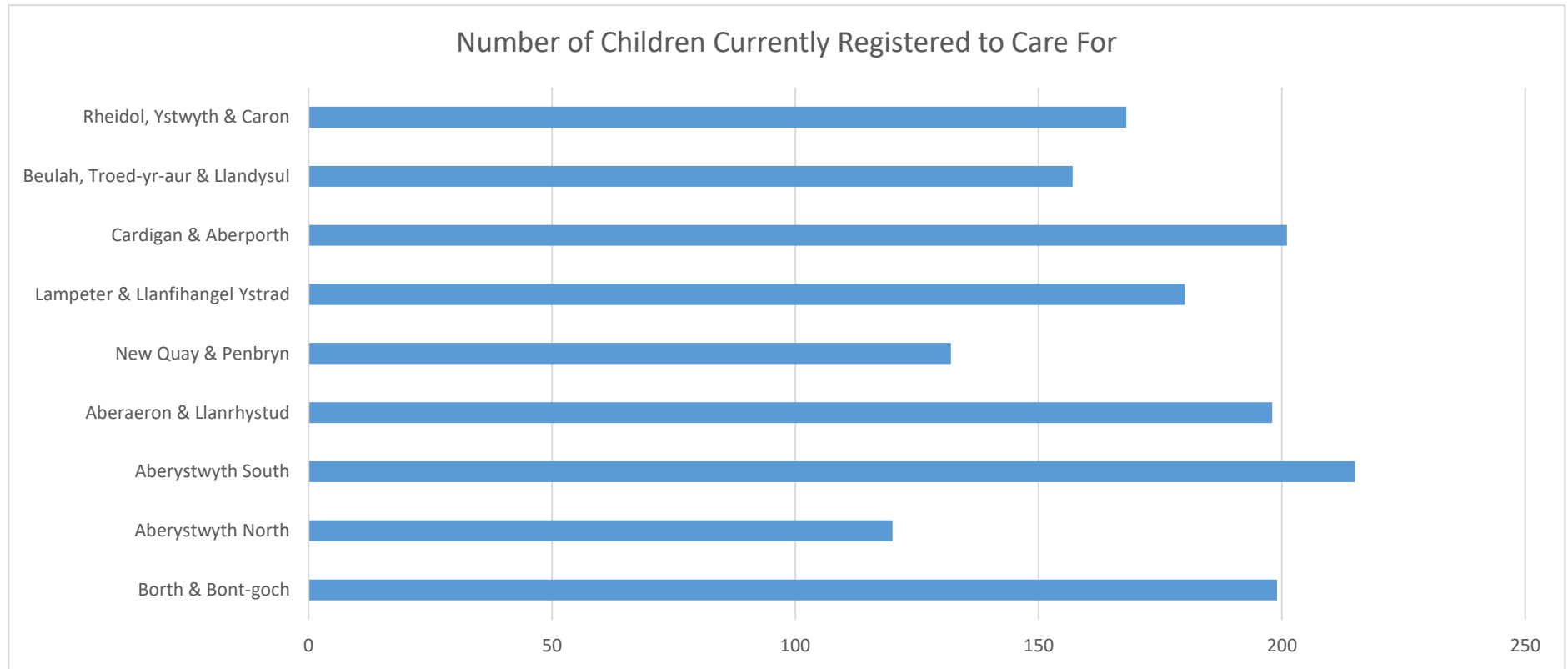
## Do you anticipate you will need more or less Childcare in the next couple of years?

Figure 14.7: Parent/Carer Future use of Childcare

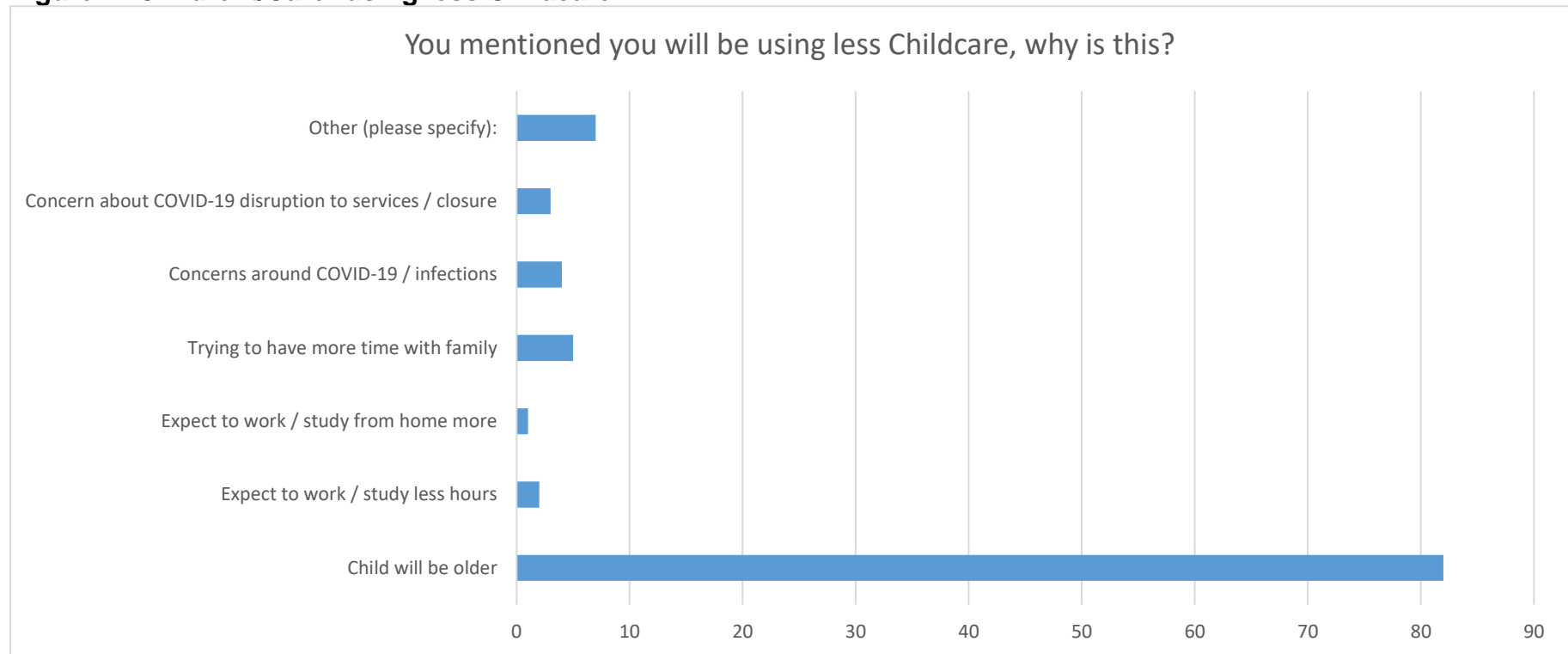


- The graph above demonstrates that there will be a demand for more Childcare provision in all 9 of the MSOA areas. In particular in the Rheidol, Ystwyth and Caron area. This is where the demand for provision is identified the most – and is in the bottom 4 areas for number of registered places (ranks 6<sup>th</sup> from 9 areas for registered Childcare places). Caution must be used here as the Rheidol, Ystwyth and Caron MSOA is by far the largest area in the county. Therefore, more localised analysis will be needed in these areas to identify where exactly the provision is required.
- Borth and Bontgoch and Aberystwyth South are also identified as areas where it is likely that more Childcare will be needed in the next couple of years.

**Figure 14.8: Number of Children Currently Registered to Care For per MSOA**

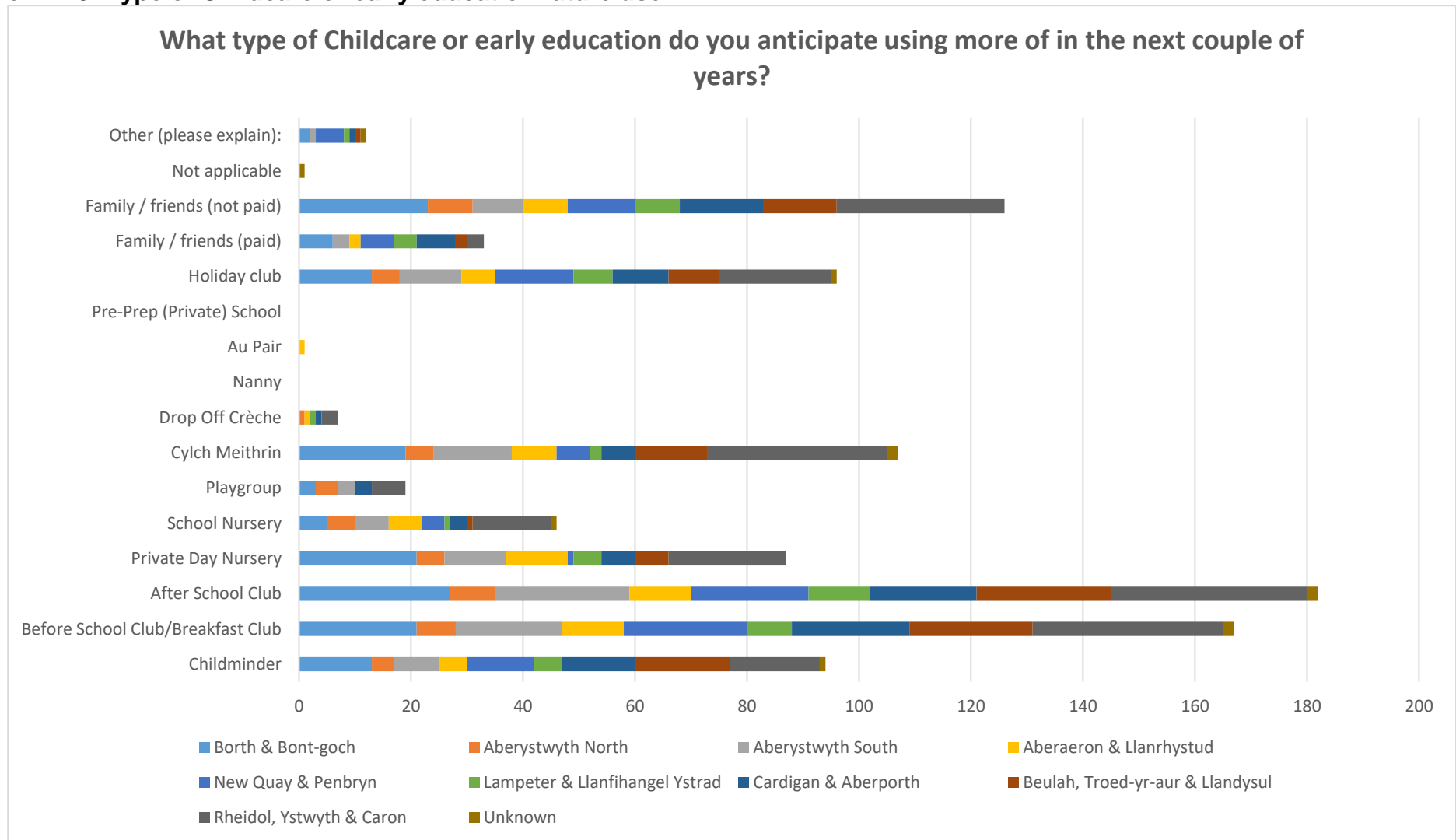


**Figure 14.9: Parent/Carer using less Childcare**



*“Youngest child will start primary school in a few years so whilst term time Childcare needs will be less, arranging Childcare during the holidays will become very difficult as there is no holiday Childcare provision for primary aged children in the county”*

**Figure 14.10: Type of Childcare or early education future use**



Breakfast Club and After School Provision are the care requirements that will be in most demand in the next couple of years, and highlights that the 'wrap around' care in schools is the main concern for parents and carers.

**15 WELSH LANGUAGE CHILDCARE**

**Table 15.1: Current access of Welsh medium Childcare**

Do you access Childcare through the medium of Welsh?	
Not answered	337
No	84
Unsure/Do not know	10
Yes	202
<b>TOTAL</b>	<b>633</b>

**Table 15.2: Wish to access Welsh medium Childcare**

If no, would you like to access Childcare through the medium of Welsh?	
Not answered	547
Don't know	3
Maybe	17
No	49
Yes	17
<b>TOTAL</b>	<b>633</b>

- 202 respondents replied that they accessed Childcare through the medium of Welsh. However, 337 had not answered this question.
- When asked if you would like to access more Welsh medium Childcare, 58% (49) replied that they did not wish to access more, 20% maybe and yes each.

**Table 15.3: Issues accessing Welsh medium Childcare:**

You told us you are not using Welsh medium Childcare, but you might like to. What issues do you face accessing Welsh medium Childcare? Please tick all that apply	Yes
Distance	7
Availability	17
Quality of Care	6
Staff language capability	7
Cost	7
Insufficient hours of care	2

- *I don't speak Welsh but I would really like to learn and I would love my kids to learn too. The barrier is that I don't speak it myself.*
- *My daughter was attending Cylch Meithrin in Aberystwyth, but we had to change setting as I couldn't get to work in time with their opening hours. Therefore I had to change to an English setting as it was the only available playgroup that opened early enough. Having said that the care and the range of experiences is second to none.*

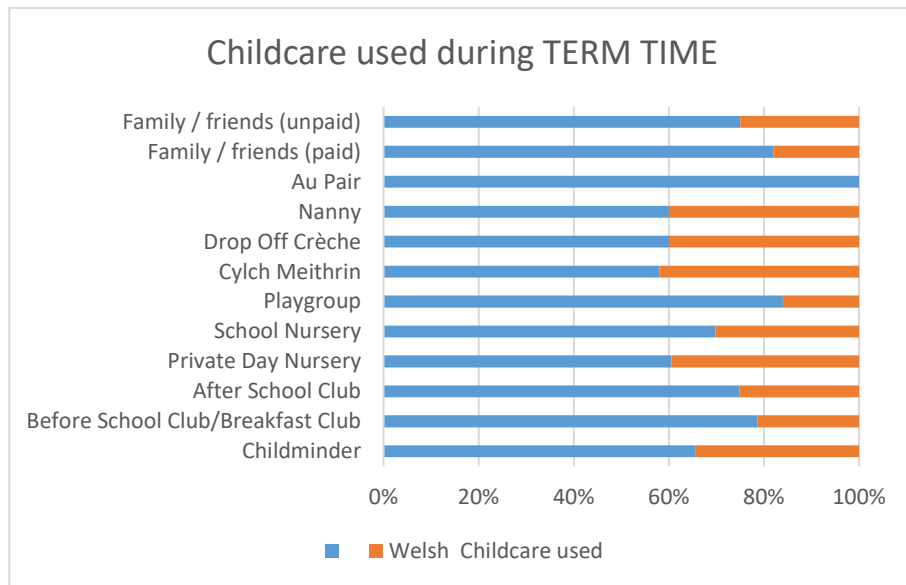
- *I could have enrolled my child at a Welsh provision nursery and although I am passionate about the Welsh language, I chose quality of provision over a Welsh language provider.*
- *I chose our current nursery as it's a small nursery, with a cosy, family oriented feeling. It is a shame that not many staff speak Welsh there.*

**Table 15.4: Welsh Childcare used during Term Time**

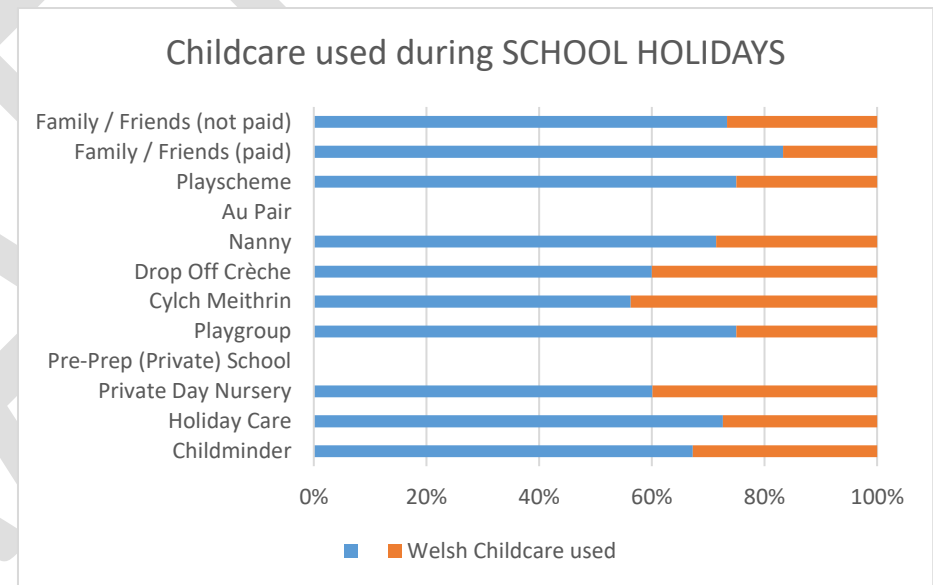
Welsh Childcare used during TERM TIME	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	Unknown	TOTAL
Childminder	3	0	4	5	5	5	11	7	5		<b>45</b>
Before School Club/Breakfast Club	12	1	5	6	3	3	4	3	9	1	<b>47</b>
After School Club	13	1	6	5		2			7	2	<b>36</b>
Private Day Nursery	12	4	13	10	1	6	2	2	20	1	<b>71</b>
School Nursery	2	1	2	1			1	2	4		<b>13</b>
Playgroup	1	1				1	1				<b>4</b>
Cylch Meithrin	17	2	8	7	6	6	5	8	21	1	<b>81</b>
Drop Off Crèche						1			1		<b>2</b>
Nanny			1					1			<b>2</b>
Au Pair											<b>0</b>
Family / friends (paid)	3	1		1	1	1					<b>7</b>

Family / friends (unpaid)	20	3	12	10	8	7	7	8	22	2	<b>99</b>
None During Term Time											<b>78</b>
<b>TOTAL</b>	<b>83</b>	<b>14</b>	<b>51</b>	<b>45</b>	<b>24</b>	<b>32</b>	<b>31</b>	<b>31</b>	<b>89</b>	<b>7</b>	<b>485</b>

**Figure 15.1: Welsh Childcare used during Term Time**



**Figure 15.2: Welsh Childcare used during School Holidays**



**Table 15.5: Welsh Childcare used during School Holidays:**

<b>Welsh Childcare used during SCHOOL HOLIDAYS</b>	<b>Borth &amp; Bont-goch</b>	<b>Aberystwyth North</b>	<b>Aberystwyth South</b>	<b>Aberaeron &amp; Llanrhystud</b>	<b>New Quay &amp; Penbryn</b>	<b>Lampeter &amp; Llanfihangel Ystrad</b>	<b>Cardigan &amp; Aberporth</b>	<b>Beulah, Troed-yr-aur &amp; Llandysul</b>	<b>Rheidol, Ystwyth &amp; Caron</b>	<b>Unknown</b>	<b>TOTAL</b>
Childminder	4		4	4	3	3	8	6	5		<b>37</b>
Holiday Care	12	2	3	2					4		<b>23</b>
Private Day Nursery	11	3	15	11	1	5	1	3	20	1	<b>71</b>
Pre-Prep (Private) School											<b>0</b>
Playgroup	1			1					1		<b>3</b>
Cylch Meithrin	1		3	1	1				1		<b>7</b>
Drop Off Crèche				1		1					<b>2</b>
Nanny			1					1			<b>2</b>
Au Pair											<b>0</b>
Playscheme	2	1		1		1					<b>5</b>
Family / Friends (paid)	3	1	1	1	1					1	<b>8</b>
Family / Friends (not paid)	23	4	15	12	7	6	8	7	26	3	<b>111</b>
None During School Holidays	4	1	3		1	4	1	2	9	1	<b>26</b>



Other (please explain): 32 comments	2	3	1	1	1	1	1	1	1	9	
<b>TOTAL</b>	<b>63</b>	<b>12</b>	<b>48</b>	<b>35</b>	<b>14</b>	<b>21</b>	<b>19</b>	<b>19</b>	<b>66</b>	<b>7</b>	<b>304</b>

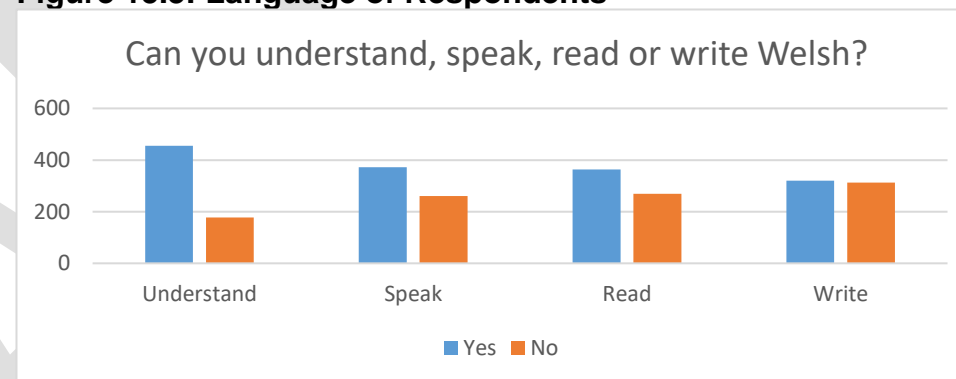
### Language of Respondents (primary language spoken at home)

53 completed the survey in Welsh – 8.37% of respondents (91.63% English – 580 respondents)

**Table 15.6: Language of Respondents**

Can you understand, speak, read or write Welsh?	Yes	No
Understand	455	178
Speak	372	261
Read	364	269
Write	320	313

**Figure 15.3: Language of Respondents**



#### Stakeholders comments:

*I know how hard the Childcare unit have worked, with Cered, to increase the level of Welsh used by Childcare providers. Just keep doing what you've been doing so far!*

*There is a need to ensure that enough Welsh speakers consider working in Childcare so that sufficient staff are available to work in this field. Ensure that the professionals e.g. language therapists able to speak Welsh with Welsh speaking families.*

*Ensure that support and assessments are available in Welsh.*

*Propose that Welsh is everyday, not too formal.*

*Mudiad Meithrin's Cylchoedd Meithrin and Day Nurseries and a wide range of settings provide high quality Welsh Medium Childcare.*

*There are difficulties at present in appointing staff, especially qualified staff who can speak the Welsh language.*

**Providers comments:**

- *More advertisement for Welsh Childminders.*
- *Free welsh lessons and templates to use in settings*
- *Childminder numbers are affected by local Cylch Meithrin accepting children from the age of 2 years. Parents often seeking wrap around care for these children which affects the child ratios.*
- *Recruitment issue.*
- *Single parents not wanting to work more than 16 hours for fears of losing their benefits and security.*
- *Part time workers not wanting to take on second job as they would be heavily taxed for it.*
- *It's a worry in this minimum wage sector when we hear comments like ' I'm better off on benefits'.*
- *We could expand to offer more space but staffing is too much of a worry to even consider this.*

**16 BARRIERS TO CHILDCARE PROVISION**

Working families require Childcare for parents to work or attend education or training. Childcare Providers must also ensure that their fees and income are sufficient to cover overheads and ensure all staff (if applicable) are paid the National Minimum Wage. A current barrier for Childcare Providers is the qualification requirements which change regularly leading to the workforce needing to update or add to their current qualifications. Childcare providers are finding it difficult to balance overheads with regional variances in demand for Childcare provision, leading to low uptake in some areas and type of provision, and waiting lists in others.

These challenges were present prior to the pandemic, which has further exacerbated the issues facing the sector. Striking the balance for affordability and business sustainability is one that the sector cannot resolve by itself.

**Childcare provider comments:**

*“we have spaces available in our after school club since the pandemic and with parents working from home we currently have less children requiring care. It’s then a fine balance to match staff numbers to child ratios and trying not to lose money on every session. It also appears to be costing the business more to provide 1to1 Childcare.”*

*“It can be a challenge to maintain 50% qualified staff ratios, this will probably increase as the Playwork qualification is introduced as well.”*

*“All childminders in Ceredigion are currently full which will affect my new position in the NHS”*

*“What I need most is after school Childcare where he can be collected from school by the care provider, in order to enable me to work through school pick up time. Also breakfast club available at school would be helpful (he's in year 5 and there's never been breakfast club, although there used to be before school 'club')”*

*“Childcare is limited and non-existent for an 11 year old in Ceredigion. Since my mother passed away last year, this means I am currently having to consider term time working as I do not have any Childcare provision during school holidays for my 11 year old and none has been available with the school.”*

*“After school club pick up to 6pm. Youngest is not able to go to breakfast club until age 4 despite being in the school for the morning session”*

*“Availability of Childcare /suitable hours issues”*

*“One child is 4 days in Childcare. Other child has 2 days, on various waiting lists for another 2 days per week”*

*“I have only just starting with a nursery placement this week, we have been on a waiting list for quite a long time and a place has just become available.”*

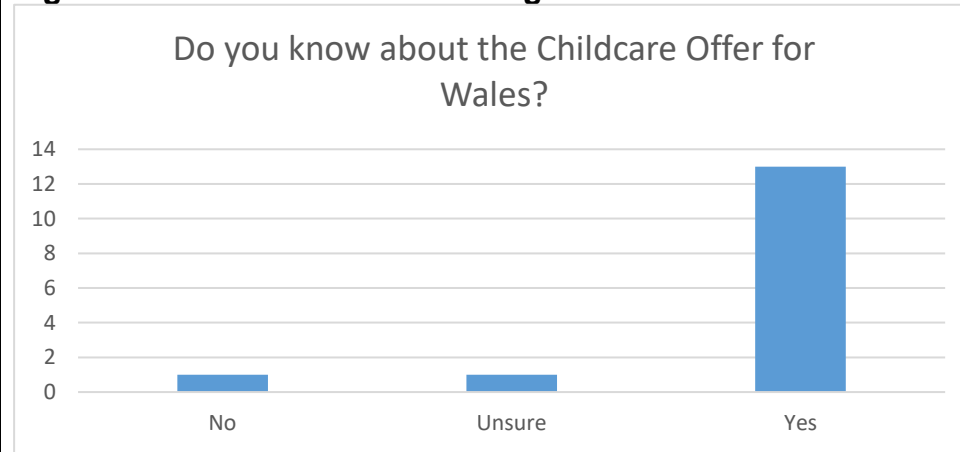
*“Lack of Childcare in my area”*

*“It would be good to have the option for English provision”*

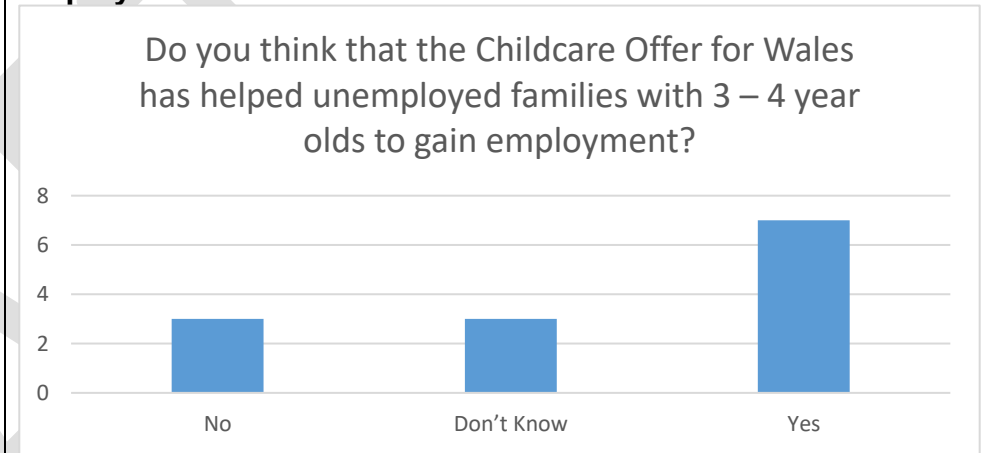
The feedback received was valuable and all taken into consideration in highlighting barriers to Childcare.

Barriers to accessing Childcare include the knowledge that parents may or may not have on what is available locally and what financial support is available to them. Knowledge of the Childcare Offer was high from the responses in the Stakeholder Survey, and was seen as supporting families into employment. More work is required to ensure that stakeholders promote the Family Information Service to their families.

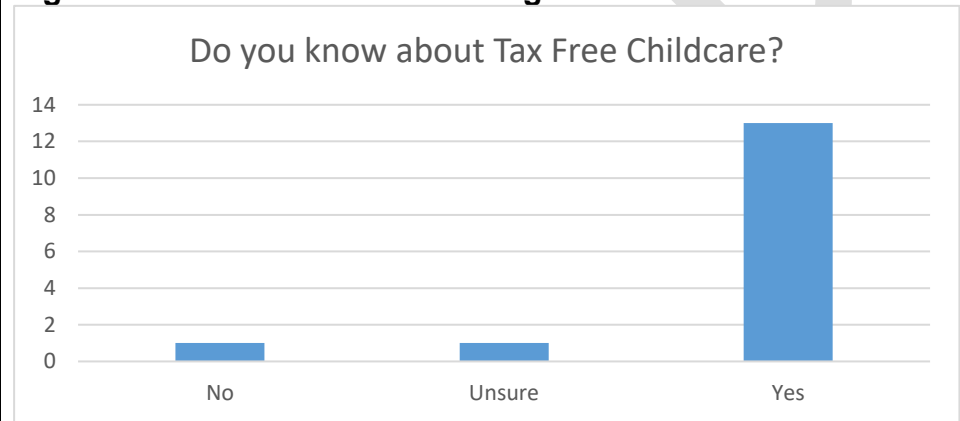
**Figure 16.1: Stakeholder knowledge of Childcare Offer**



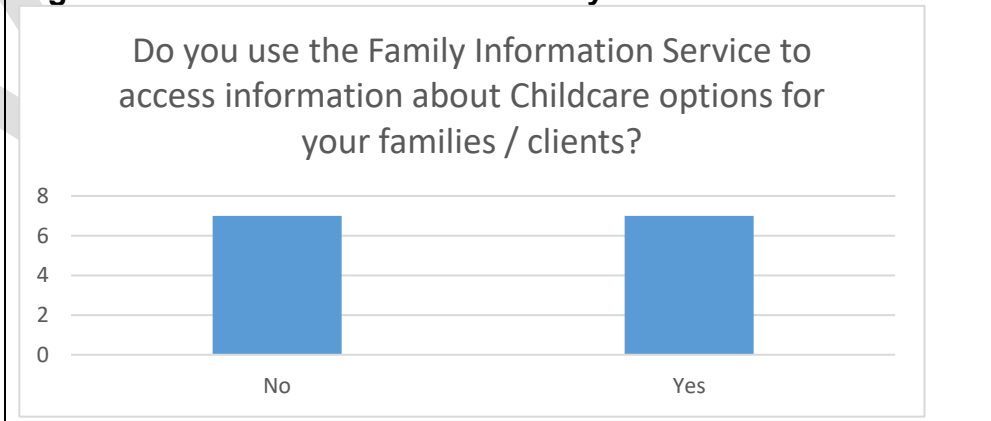
**Figure 16.2: Stakeholder – Childcare offer help to gain employment**



**Figure 16.3: Stakeholder knowledge of Tax Free Childcare**



**Figure 16.4: Stakeholder use of Family Information Service**



## **(i) Working Parents**

The highest response to the parent/carer survey was from working parents. Feedback through this report highlights issues that working parents have when it comes to Childcare which include cost, availability and flexibility of provision. Wrap-around provision in terms of before and after-school care and holiday care is one of the biggest barriers to Childcare highlighted in this assessment.

### **Stakeholder comments:**

*“... there are a couple of staff members working with me who are working flexible hours because they can't access Childcare, luckily they have family members nearby who can look after the children or pick them up from school and as an employer, we can be pretty flexible, but it's not a perfect scenario.”*

*“..... The number of community -led, voluntary run settings has significantly diminished year on year, particularly impacting rural/disadvantaged areas (where there is already reduced Childcare availability), leading to lower income/rural families being disproportionately affected in terms of ability to enter/remain/progress in employment (where privately managed provision replaces these settings, it will often require higher fees to cover costs). As an example, one voluntary run Holiday club's fees in Ceredigion are £26 pounds per day, whilst a private provider in the area charges £46 per day for a similar service, although there is some resistance by voluntary groups to raise fees for their families to more sustainable levels.”*

*“Childminders can be well placed to provide quality, flexible Childcare for families working atypical hours, shifts, or even provide overnight care. Childminders can also care for children from birth up to the age of 14 (or 16 if children have additional learning needs). Childminders can provide out of school and holiday care, as well as Childcare Offer and Flying Start provision - especially in areas where demand may exceed available places.”*

### **Parent's comments:**

*“We are trying to find care so we can work but unable to”*

*“He spent the majority of lock down on a building site as I wasn't seen as a 'key worker”*

*“I used to only work term time as there were no holiday options for any age group in my area”*

*“I would like to so I can work, but nothing available”*

*“Have to take unpaid leave from work”*

*“Nana who lives an hour away and taking annual leave.”*

*“Reduce hours and take holiday leave”*

*“No after school Childcare. The school don’t provide and no childminders available in the area. It is causing massive problems for working families and have heard a number of mothers stating that they will have to finish employment because of the situation.”*

*“Covid restrictions in my area have had huge implications on Childcare provisions. My work commitments are such that I would struggle to manage the additional pressure of having to drop off and pick up”*

*“Cannot afford any Childcare and have to rely on family which stops them working”*

**Some parents who were Shift workers expressed challenges with Childcare:**

*“As a nurse and HGV driver both working shifts”*

*“I need child care for a baby on a rota system as my partner works shifts. No Childcare providers adapt to shift patterns”*

**Providers comments:**

- No comments received

**(ii) Parents seeking work or training opportunities**

Parents seeking work or training opportunities living in Flying Start areas are currently able to access 12.5 hours of Childcare per week for 2 – 3 year olds. This is limited to specific postcodes. However, as this report is being compiled a commitment by Labour Government and Plaid Cymru has announced that 12.5 hours of funded Childcare will be available for all 2 year olds. How and when this will be introduced is yet to be confirmed. However, any additional hours over and above the 12.5 will need to be paid for.

All three year olds are also eligible for 10 hours of funded early education provision in a non-maintained setting or up to 12.5 hours in a maintained setting.

Parents and Childcare Employment (PaCE) can also support unemployed households to get back to the labour market by assisting them with any training opportunities etc. and covering the cost of Childcare. It is a Welsh Government project in partnership with DWP and is funded by the European Social Fund (ESF). The project has been extended until March 2023.

The Childcare Offer can support parents with up to 20 hours of Childcare in addition to the early year's education. Providing that a parent can demonstrate they are about to start work with confirmation from an employer then they may be eligible for the offer.

**Stakeholder comments:**

*The PaCE project seems to work from the reports provided by DWP but I haven't heard any teams talking about the scheme, it doesn't feel as though DWP and the Childcare Unit are working jointly on this scheme and this perhaps could be improved.*

*School age Childcare costs can continue to be a barrier in parents/carers increasing working hours / progressing in careers / taking up employment.*

*PACEY Cymru is working in partnership with JCP, PaCE, Careers Wales and other agencies to support recruitment to become a childminder, which not only provides wider Childcare options for families in their local area but supports people back into work.*

**Parent's comments:**

*"I am a postgraduate student at Aberystwyth university, they provide zero Childcare provision. That is my issue."  
"My kids' dad luckily isn't working so he has them around school hours while I'm working as if he was working, I'd have to give up work because of lack of Childcare"*

**Providers comments:**

- No comments received

**(iii) Unemployed Households**

Many of the initiatives identified above are also of relevance to unemployed households.

**Stakeholders comments:**

*The "top ups" are unfair on parents who do not receive and income so the children do not attend, do not attend full time / regularly, this affects their development.*

*Many children especially from the Lampeter area do not attend any pre-school provision, many of these are vulnerable. This town needs a non-maintained setting.*

*We are seeing more and more children needing early intervention within Childcare settings so it is essential that funding is available to support these children. The Outreach that has been offered over Covid has had a positive impact on the children and families but it must be ensured that these children have been recognised and referred and if the funding ends there will be a big gap once again.*

**Parent's comments:**

- No comments received

**Providers comments:**

- *Funding made available to those who are students.*

**(iv) Low income families**

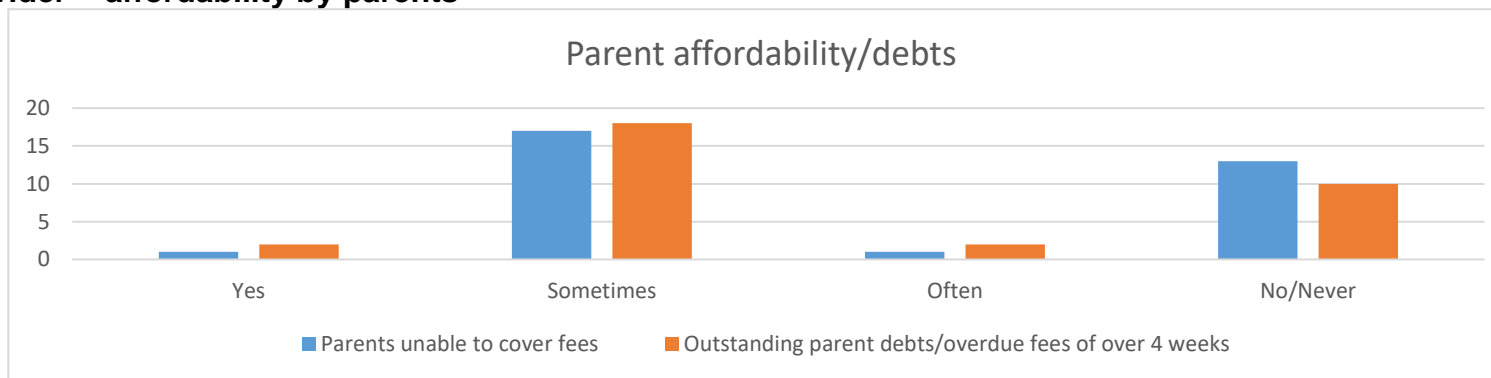
The biggest barrier for parents accessing Childcare appears to be the cost of Childcare. 307 respondents strongly agreed that Childcare is too expensive and 172 stated that they 'tend to agree'.

**Table 16.1: Provider - affordability by parents**

<b>Provider feedback</b>	<b>Yes</b>	<b>Sometimes</b>	<b>Often</b>	<b>No/Never</b>
Parents unable to cover fees	1	17	1	13
Outstanding parent debts/overdue fees of over 4 weeks	2	18	2	10



**Figure 16.5: Provider - affordability by parents**



Affordability of Childcare has been identified as an issue by providers and parent/carers. The number of Children in Poverty has increased 2.7% since 2014/15 with 3 in 10 children living in poverty, with 6.9% of children living in workless households (*The % of children living in workless households in Ceredigion is based on a low sample size and therefore these figures should be used with caution*).

Median annual earnings in Ceredigion by place of residence is £23,576 and is below the Wales median (Source: Office of national Statistics - Annual survey for hours and earnings 2020)

The number of people on Universal Credit has increased by 112% since March 2020, with 10.5% of working aged people in Ceredigion receiving Universal Credit.

32.4% of households in Ceredigion are living in poverty compared to 35% in Wales

\*Sources: Department of Work and Pensions, NOMIS, Welsh Government, Welsh Index of Multiple Deprivation, Census 2011

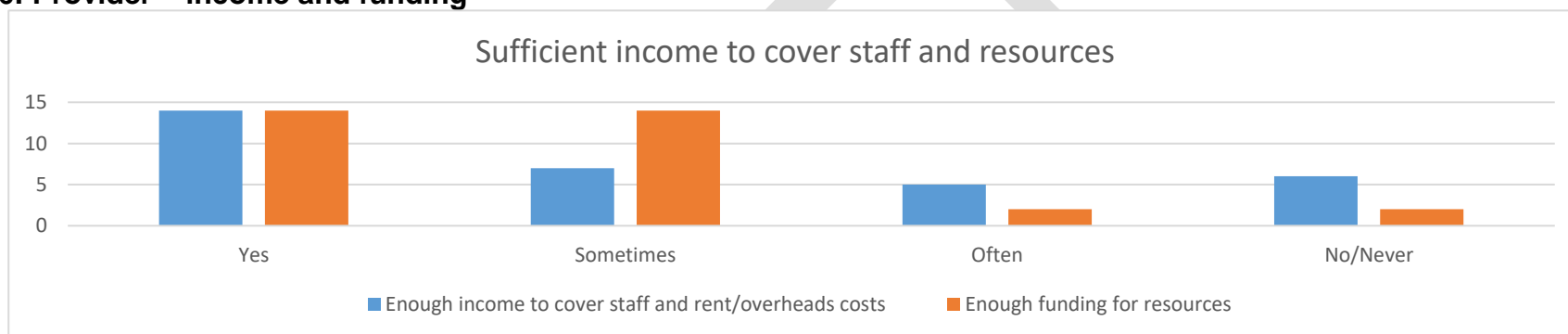
**ACTION: Work with the Tackling Hardship group / establish a task group to carry out further research to identify issues or areas where affordability by parents is also impacting on sustainability of Childcare settings. Research into 20 most deprived areas and any correlation with sustainability of settings, and link with proposed housing development.**

**ACTION: There is a need to promote Childcare support schemes to parent/carers and businesses, and we propose to take this to the Tackling Hardship Strategy Group which aims to address in-work poverty in Ceredigion**

**Table 16.1: Provider – income and funding**

Provider feedback – income and funding	Yes	Sometimes	Often	No/Never
Enough income to cover staff and rent/overheads costs	14	7	5	6
Enough funding for resources	14	14	2	2

**Figure 16.6: Provider – income and funding**



Financial help for settings has been made available through Welsh Government funding in recent years through the Childcare Offer Capital Small Grants Scheme as well as Foundation Phase Nursery grants for resources etc. However, covering revenue costs remains challenging for Settings. In particular, the charitable status Playgroups, where Committees often rely on fundraising activities to cover costs, and these have been dramatically curtailed during the last two years due to the pandemic. Welsh Government sustainability grants have been made available, and although these provided an additional workload for the settings, have enabled most to cover the larger revenue costs.

Non-maintained settings who also provide the Foundation Phase education have benefited from additional funding for resources.

**Stakeholder comments:**

*“Please establish a subsidised Childcare scheme to enable working parents on a low income to access work, the Childcare Offer is good but many parents are ineligible. Rates of in-work poverty are increasing and the cost of Childcare means that many parents simply can’t afford to work, even with the Childcare Offer.”*

*We are seeing more and more children needing early intervention within Childcare settings so it is essential that funding is available to support these children. The Outreach that has been offered over Covid has had a positive impact on the children and families but it must be ensured that these children have been recognised and referred and if the funding ends there will be a big gap once again. There are rumours that the living wage is rising again, this is going to have a negative impact on fees and affect the sustainability of the settings.*

**Stakeholder Comments:**

*“I feel that children ages 2 to 2 1/2 years in Lampeter area are missing an opportunity of having early education like other areas. Other areas in Ceredigion such as Felinfach, Dyffryn Cledlyn offer a Ysgol Meithrin which I think this service is a fantastic opportunity and a great start for the children's educational journey. This would reduce later referrals for speech and language by being identified at an earlier stage. This is also a cheaper and suitable service for low income families that are unable to afford to send their children to nurseries or childminders”*

*There is a need to ensure that systems are in place so that parents know where to find up-to-date information on Childcare and what support is available to them i.e. Tax free Childcare, Childcare Offer, Flying Start Support.”*

*There is also a need for grants available to allow settings to be able to offer an affordable service. Settings do consider their customers and offer a service that meets the needs of as many parents as possible.*

*PACEY Cymru is working in partnership with JCP, PaCE, Careers Wales and other agencies to support recruitment to become a childminder, which not only provides wider Childcare options for families in their local area but supports people back into work.*

**Parent's comments:**

*“Take him to work because I can't afford Childcare”*

*“Something based in cardigan other than childminders. There a lot of families in the area many of whom don't drive or have access to a vehicle. Needs to be local for work and school”*

**Providers comments:**

- *Expanding the Childcare Offer to cover those families on lower incomes.*
- *Some families struggle to pay for After School Club provision although we keep fees as low as possible. ie £ 3.25 per hour.*

**(v) Lone parent families**

Similar issues as to low income families see above.

**Stakeholder comments:**

*There is a need to ensure that systems are in place to provide parents with up to date information on the help available to them to pay for Childcare and that grants are available to allow settings to offer an affordable service*

*Settings do consider their customers and offer a service that meets the needs of as many parents as possible.*

**Parent's comments:**

*"I can't afford to send my child to holiday club any more. One year it cost me £600 for the 6 weeks holiday. I am a single parent. I have had to resort in taking my son to work with me if my family aren't available to help me with Childcare. This ended up being the majority of the lockdowns"*

*"After school club only 3 days a week and only until 4:30pm. There is hardly any Childcare in Ceredigion. It is impossible for a single parent to work a 9-5 job. Absolutely impossible. There is no provision for after 4:30 and the majority of jobs are an hour's drive away so have to leave work by 2:30 3 days a week and 3:30 2 days a week. If you are a single parent you are literally stuck in poverty until the children are no longer dependant it has been nearly 14 years for me stuck in poverty unable to work as I would like because of lack of Childcare provision. It is another 10 years until my youngest is 17. That's 23 years stuck in poverty with no prospect of things improving due to being a single parent and there being a serious lack of wraparound Childcare in Ceredigion. It severely affects my mental health to see that other people who have the privilege of a partner or family to care for their children can get good jobs and have a decent income while I am completely trapped due to lack of wraparound Childcare."*

*"No wraparound Childcare. After school club only available 3 days a week and only until 4:30. This works for couples or those with family who help and can share pick up times, makes it impossible for single parents who have to be available for the entirety of the Childcare needs"*

(vi) Families from ethnic minority backgrounds

Table 16.2: Respondents by Ethnic Group	Number	%	Census 2011 (%)	
1. Welsh/English/Scottish/Northern Irish/British	582	91.9	93.1	-
2. Irish	1	0.2	0.6	-
3 Gypsy or Irish Traveller	0	0	0.1	-
4. Any other White background, please describe:	8	1.3	2.9	-
5 White and Black Caribbean	6	0.9	0.3	+
6 White and Black African	3	0.5	0.1	+
7 White and Asian	4	0.6	0.3	+
8 Any other Mixed/multiple Ethnic background, please describe	1	0.2	0.3	-
9 Indian	4	0.6	0.5	+
10 Pakistani	0	0	0.1	-
11 Bangladeshi	0	0	0.1	-
12 Chinese	1	0.2	0.4	-
13 Any other Asian background, please describe	1	0.2	0.3	-
14 Africa	4	0.6	0.2	+
15 Caribbean	0	0	0.1	-
16 Any other Black/African/Caribbean background, please describe	0	0	0	1
17 Arab	2	0.3	0.3	1
18 Any other ethnic group, please describe	3	0.5	0.2	+
TOTAL	633	100		

The responses are broadly representative of the Ceredigion populations. In fact, in a number of different backgrounds there are higher returns than normally received from engagements/consultations, for example the Mixed background which is a real positive.

There are some groups not represented at all, including Gypsy Traveller, Pakistani and Bangladeshi, but this is to be expected due to the very small numbers in Ceredigion.

Ceredigion County Council has recently produced its new Gypsy and Traveller Accommodation Assessment 2022, in accordance with the Housing (Wales) Act 2014. Currently there are no local authority Gypsy Traveller sites and only one authorised private site in the County; nor is there any permanent provision for Showmen. There are three known Gypsy Traveller households whose accommodation needs are

currently being met by bricks and mortar accommodation. It is recognised that this number may be higher and that further engagement with the Gypsy Traveller community is needed. A number of initiatives have been undertaken to develop the engagement and form an ongoing dialogue, but the onset of the COVID-19 pandemic during 2020/21 impacted on the progress that could be made due to restrictions in place.

Syrian Refugee Support and Restoring Family Links is managed by the British Red Cross, and within their response to the Play Sufficiency Assessment noted that families within the resettlement scheme noted what was on in terms of holiday playschemes was difficult especially if not on social media. They noted that second-language applicants were at a disadvantage due to their communication barriers when registering for some schemes combined with the competition to register before spaces were filled, as some cultures did not live by the concept of 'committing far in advance' to a leisure activity.

Transport was also highlighted as an issue when having to travel by public transport especially if pick-ups / drop-offs were involved and this would apply to all families living in rural areas not well serviced by public transport.

**Stakeholder comments:**

*I work with refugees and they have difficulty making themselves understood, they are learning English but it's a slow process. Some awareness training re working with people with other languages could be useful.*

**Parent's comments:**

No comment's provided.

**Providers comments:**

*Interpreter if required and a knowledge of individual cultures to be respected.*

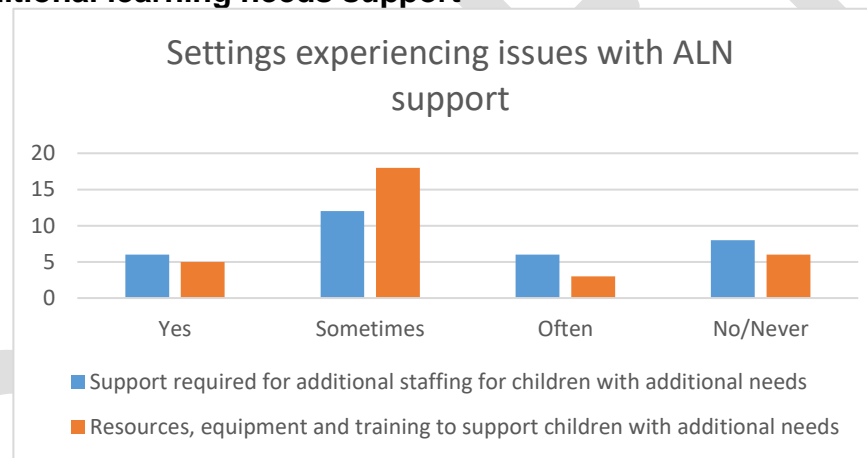
**(vii) Families with children who have special educational needs, or a disability**

Settings reported on the need for support for children with additional learning needs:

**Table 16.3: Provider – Support for children with additional learning needs**

Provider feedback	Yes	Sometimes	Often	No/Never
Support required for additional staffing for children with additional needs	6	12	6	8
Resources, equipment and training to support children with additional needs	5	18	3	6

**Figure 16.7: Provider issues with additional learning needs support**



The current support for pre-school children with additional learning needs is provided by the Cynllun Cyfeirio Scheme in Playgroups and Day Nurseries. The scheme is well recognised and understood by the sector with dedicated officers employed by Mudiad Meithrin and Flying Start, all funded by Ceredigion County Council and Welsh Government grants.

Anecdotal evidence during the last 18 months states an increase in children requiring support which may be due to children not being able to attend regular Childcare during the pandemic period and restrictions in allowing key professionals to assess the children. The inability to recruit staff to provide the support required within settings further impacts on provision of early intervention.

An essential element of addressing gaps in provision must be maintaining Childcare provision which is already operating and run/staffed by qualified and experienced practitioners. All types of Childcare settings are experiencing low morale and fatigue following the pandemic, and reporting this to the Childcare Unit. They are facing the additional pressures of identifying need and putting in place provision for an increasing number of children with developmental delay and additional or emerging needs. This is compounded by the additional tasks required to ensure COVID safety, and additional paperwork needing to be undertaken in relation to this and in applying for grants.

**ACTION: Need to commission research into ALN demand and provision, recruitment and retention of qualified staff, including area analysis and link to housing development to address the issues experienced by settings regarding ALN support**

**ACTION: Need to ensure that all Childcare settings are meeting the requirements of the ALN code.**

In response to the new ALN Code a training package of modules has been developed by the EYALNLO. This is a series of 9 modules which have been rolled out in different stages to the Childcare sector. Training has been offered to all Childcare provider types with a high percentage of staff accessing the training. Feedback from providers has been positive to the training as many have reported that it has given them the confidence to discuss any concerns they may have about a child with a parent. By offering the training to childminders they now feel more confident in getting in touch with the EYALNLO if they need any further advice on how to accommodate a child if they have any concerns.

Childcare remains to be an issue for some families accessing Childcare for a child with a disability or additional learning need. However, the results of the parent survey identified that (71) parents felt that does not cater for their child's needs. It is unclear from the survey what these specific needs are.

Care Inspectorate Wales (CIW) published their national report on **National Review of early help, care and support and transition for disabled children in Wales in autumn 2021** following a review of the support offered to disabled children in Wales. CIW also carried out inspections of disabled children's services in 4 Local Authority areas including Ceredigion County Council and noted that consideration had been given to the Additional Learning Needs and Education Tribunal (Wales) Act 2018. The Schools Service has appointed an Early Years Additional Learning Needs Coordinator (EYALNLO) to be responsible for the pre-school children identified with additional learning needs.

The Children and Communities grant funding supports 2 specialist holiday playschemes for children with disabilities or additional learning needs – one in the north and one in the south of the county in the summer, as well as Easter activities. Unfortunately, due to the Covid-19 pandemic, these services have been severely disrupted, with only targeted provision allowed, and the summer playschemes where siblings could also attend were not able to be delivered.



However, there is a strong commitment by the Local Authority to continue to support the provision when regulations and restrictions allow.

Closure of two of our out of school settings has impacted children that used to access additional support through the Ymuno funding by DASH in these clubs. Work is underway to with Mudiad Meithrin and re-establish new clubs in Cardigan and Llwyn yr Eos. Allowing children to access provision once again.

The pandemic has led to an increase in the number of children being identified with developmental delay. This will put a strain on resources as more help is needed to ensure early intervention is put into place to support these children to access Childcare.

**Stakeholder comments:**

We need more Childcare for children with disabilities as families with disabled children don't seem to feel that they can use mainstream Childcare providers. The Ymuno scheme appears to work well but is not well used, particularly during the pandemic (which may be due to perception of increased risk to vulnerable children).

Naturally more specialist care should be available to families with children in this category and dependent on the needs of the child. Whilst this is available at some locations within the county, accessing it can be problematic in terms of transport etc.

Ceredigion settings are offered a number of training sessions by various services e.g. Mudiad Meithrin, Education, Flying Start, Speech and Language Department etc.

The settings are also well supported by various agencies who work closely together e.g. Referral Scheme, Language Therapists, ALN Lead for Early Years, Team Around the Family etc...

There is a need to ensure that good practice is consistent across the County in all settings.

Support for settings with children who have additional learning needs or a disability is usually available through the Referral Scheme when children turn 2 and until they have started in an Education setting, unless they are on the Childcare Offer. There is no support for placements before the children are 2 years old. Children do not have access to the same support in an education setting as they would in a Childcare setting.

**Parent's comments:**

*"I don't need child care right now but did need it for 11+ as my son had ADHD and couldn't be left home alone"*

*"There is no Childcare for my 3 year or and my 5 year old with SEN during school holidays."*

*“Ours shut down. Nothing else for disabled secondary aged children at all”*

**Providers comments:**

*extra training for Childcare worker's to accommodate additional learning needs or a disability, quicker recognizing children with additional needs, listening to early year's under 2s Childcare worker's, such as childminder's as we have had training to develop our skills but don't feel we are being listened to.*

*More additional support available in terms of funding for staffing issues*

(viii) Any other specific target groups relevant to the Local Authority area

Rurality is an issue for many families – especially those that have to rely on public transport.

**Parent's comments:**

*“There is no after school Childcare available in the rural village where I live”*

*“Need to have holiday clubs that cover a whole day - none for over an hour's drive”*

*“There is a lack of Childcare in Cardigan in any [language] medium! We have to drive to Newcastle Emlyn twice a day to access a nursery, which takes around 2 hours total each day. It is ridiculous that Cardigan can't provide Childcare other than childminders, which have no vacancies anyway. Meithrin is only for children aged 2+ and only for a few hours per day. For 2 full time working parents who have no family help, it is very difficult and expensive! The government is doing nothing to help mothers get back to work.”*

**Further evidence of feedback from parents can be seen in Annex 2. The feedback is recorded per MSOA.**

**17 FUNDED NURSERY EDUCATION AND FLYING START PROVISION**

## FUNDED NURSERY EDUCATION

Every three-year-old is eligible for 10 hours of funded early education if a parent / carer wishes to access this. In Ceredigion the early education entitlement is available through the maintained sector (nursery class within a large primary school) which provide up to 12.5 hours per week, or the non-maintained sector (Cylchoedd Meithrin/Playgroups/Day Nurseries) which provide 10 hours per week the term following a child's third birthday. No childminders deliver the early education.

Full-time education in schools is available to all children the term following their 4<sup>th</sup> birthday.

The funded education element is included in the Welsh Government Childcare Offer of 30 hours funded Childcare for eligible working parents. The 10 or 12.5 hours is available to ALL parents, but the marketing and messaging has created some confusion amongst parents as to what they are eligible for, and which hours are education or Childcare.

**Table 17.1: Number of Childcare providers funded to provide Early Years Part Time Education: Autumn 2021**

Type of provider Providers have changed categories into following:	Total number	Total number of places available	Total number of places accessed (202 in Childcare settings)
Sessional Day Care settings	6	101	54
Sessional Full Day Care settings	13	243	139
Full day care Nurseries	2	40	9
Schools	14	469	362
<b>Total</b>	<b>35</b>	<b>853</b>	<b>564</b>

Since the last CSA was completed the number of non-maintained settings delivering three-year-old education has decreased. This has fallen from 24 settings to 21 settings a decrease of 3. Whilst the numbers of schools offering the funded part-time education has increased from 13 to 14.

Ysgol Gynradd Llanddewi Brefi and Ysgol Gynradd Tregaron have moved to a single site on the grounds of Ysgol Henry Richard a 3 – 16 school. The school provides the three-year-old education whilst the Cylch Meithrin offer the wrap around Childcare provision. Funding from the Childcare Offer Capital Grant has enabled the Cylch to move from a cabin into a purpose-built building in January 2022.

A new area school Ysgol Dyffryn Cledlyn opened September 2017 and offered 3-year-old education within the school nursery class and the Cylch Meithrin provision offer the wrap around Childcare facility.

21st Century Schools funding and Childcare Offer Capital grant has been committed to the development of a new 3-11 Primary school in the Lampeter and Llanfihangel Ystrad areas (mid Ceredigion). This will enable the local Cylch Meithrin playgroup to relocate into larger premises (currently registered for 12 and offers two sessions for 24 places). No other non-maintained settings will be affected by this new school.

Any future re-organisation proposals that draw 3 year old education into schools may have an impact on childcare providers. Appropriate actions will need to be considered to mitigate any decline in childcare places which will mean we are not securing sufficient childcare as is our statutory duty.

In Autumn 2021, 202 children received the early year’s entitlement in a non-maintained setting and 362 children received the part-time entitlement in a school.

Most of the funded education in Ceredigion is delivered through the medium of Welsh. In addition there are 3 Childcare settings where provision is delivered in English with some Bilingual elements.

**Table 17.2: Attendance profile of children attending provision (Childcare providers and schools):**

	<b>Gender</b>	<b>Total number of 3 year olds in a Cylch Meithrin</b>	<b>Total Number of 3 year olds in a school</b>	<b>Total number of 4 year olds in a school</b>
<b>April 2021 PLASC* – *PLASC data was received a term later than usual, so must</b>	Total	180	346	983
	Male		170	501
	Female		176	482

<b>not be compared to previous years</b>				
<b>PLASC data Autumn Term 2021</b>	<b>Gender</b>	<b>Total number of 3 year olds in a Cylch Meithrin</b>	<b>Total Number of 3 year olds in a school</b>	<b>Total number of 4 year olds in a school</b>
	Total	202	362	576
	Male	103	163	318
	Female	97	199	258

The above table includes Spring 2021 figures which were lower than average due to the gradual return to post pandemic closure. Figures for this CSA is based on the data for Autumn Term 2021 which better reflects average attendance.

#### Autumn Term 2021

There are 21 non-maintained settings providing three-year-old education and these are categorised in the 9 Middle Super Output Areas of Ceredigion.

**Table 17.3: Number of Childcare places available and filled for three-year-old education, language of service provider:**

<b>Cylch Meithrin (CM) / Playgroup name</b>	<b>CHILDCARE TYPE</b>	<b>Total number of registered spaces/spaces available</b>	<b>Total number of children attending Autumn 2021</b>	<b>Language of Provider CIW Categories of: Welsh; English or Both</b>	<b>Middle Super Output Area MSOA Name</b>
Llangwryfon	Sessional Day Care	15	3	Welsh	Aberaeron & Llanrhystud
Glan y Mor Llanrhystud	Sessional Full Day Care	19	16	Welsh	Aberaeron & Llanrhystud

Gofal Plant Mes Bach / Little Acorns	Sessional Full Day Care	20	6	English	Aberystwyth North
St Padarn's Playgroup	Sessional Full Day Care	19	7	Both	Aberystwyth North
Camau Bach	Full Day Care Nursery	24	2	Welsh	Aberystwyth South
Trefeurig	Sessional Full Day Care	19	12	Welsh	Borth & Bont-goch
Talybont	Sessional Day Care	20	7	Welsh	Borth & Bont-goch
Plas Gogerddan Nursery	Full Day Care Nursery	16	7	Both	Borth & Bont-goch
Aberporth Bilingual	Sessional Day Care	21	8	Both	Cardigan & Aberporth
Llechryd	Sessional Day Care	14	8	Welsh	Cardigan & Aberporth
Penparc	Sessional Full Day Care	19	13	Welsh	Cardigan & Aberporth
Ffrindiau Bach Tegryn	Sessional Full Day Care	19	11	Welsh	Cardigan & Aberporth
Ynys y plant Felinfach	Sessional Day Care	12	18	Welsh	Lampeter & Llanfihangel Ystrad
Cei Newydd	Sessional Full Day Care	19	9	Welsh	New Quay & Penbryn
Llanarth	Sessional Full Day Care	20	16	Welsh	New Quay & Penbryn
Talgarreg	Sessional Full Day Care	15	6	Welsh	New Quay & Penbryn
Llanfarian	Sessional Full Day Care	20	7	Welsh	Rheidol, Ystwyth & Caron
Llanilar	Sessional Full Day Care	19	10	Welsh	Rheidol, Ystwyth & Caron
Penllwyn	Sessional Full Day Care	19	13	Welsh	Rheidol, Ystwyth & Caron

Pontrhydfendigaid	Sessional Full Day Care	16	13	Welsh	Rheidol, Ystwyth & Caron
Llangeitho	Sessional Day Care	19	10	Welsh	Rheidol, Ystwyth & Caron
<b>21 settings</b>		<b>384</b>	<b>202</b>		

Since the last CSA 3 settings have closed – Cylch Meithrin Gwennog (education moved into school), Cylch Meithrin Borth and 1 Day Nursery setting have stopped providing early education.

**Table 17.4: Number of School places available and filled for three-year-old education, language of service provider:**

Name of School	Total number of spaces available *Admission Number*	Total number of children attending	Language of Provider	MSOA Name
Aberaeron	28	27	Welsh	Aberaeron & Llanrhystud
Llwyn yr Eos (Penparcau)	31	22	English Medium with significant use of Welsh	Aberystwyth South
Plascrug	58	41	English Medium with significant use of Welsh	Aberystwyth South
Ysgol Gymraeg Aberystwyth	52	51	Welsh	Aberystwyth South
Bro Teifi (Llandysul)	51	42	Welsh	Beulah, Troed-yr-aur & Llandysul
Cenarth	10	12	Welsh	Beulah, Troed-yr-aur & Llandysul
Rhydypennau	27	21	Welsh	Borth & Bont-goch
Aberteifi	60	46	Welsh	Cardigan & Aberporth
Bro Pedr (Lampeter)	53	30	Welsh	Lampeter & Llanfihangel Ystrad
Dyffryn Cledlyn (Drefach)	17	13	Welsh	Lampeter & Llanfihangel Ystrad
Y Dderi (Llangybi)	19	10	Welsh	Lampeter & Llanfihangel Ystrad

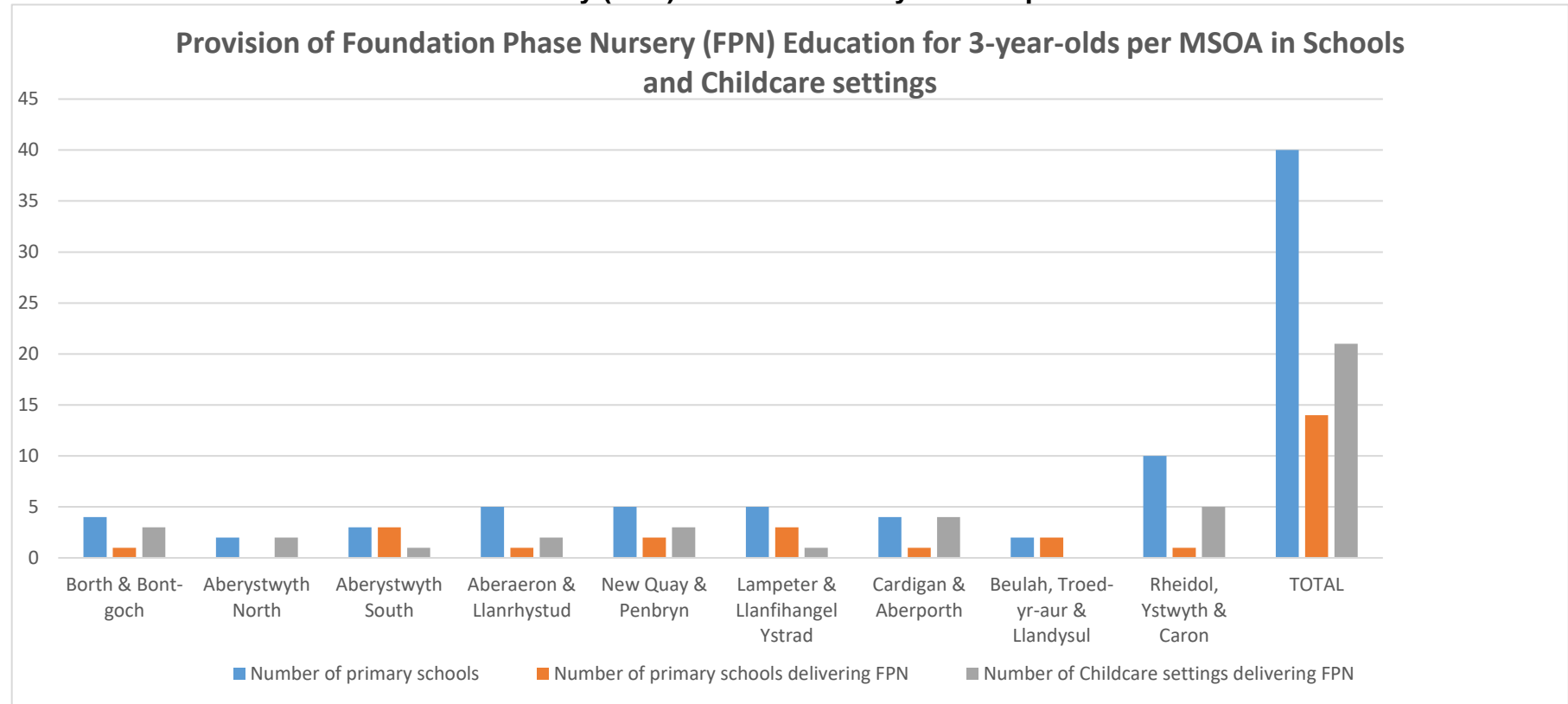
Bro Sion Cwilt (Synod Inn)	21	13	Welsh	New Quay & Penbryn
T. Llew Jones (Brynhoffnant)	25	19	Welsh	New Quay & Penbryn
Henry Richard (Tregaron)	17	15	Welsh	Rheidol, Ystwyth & Caron
<b>40 schools primary - 14 deliver FPN</b>	<b>469</b>	<b>362</b>		

**Table 17.5: Summary of Provision of Foundation Phase Nursery (FPN) Education for 3-year-olds per MSOA:**

<b>Provision of Foundation Phase Nursery (FPN) Education for 3-year-olds</b>	<b>Number of primary schools in area</b>	<b>Number of primary schools delivering FPN</b>	<b>Number of Childcare settings delivering FPN</b>
Borth & Bont-goch	4	1	3
Aberystwyth North	2	0	2
Aberystwyth South	3	3	1
Aberaeron & Llanrhystud	5	1	2
New Quay & Penbryn	5	2	3
Lampeter & Llanfihangel Ystrad	5	3	1
Cardigan & Aberporth	4	1	4
Beulah, Troed-yr-aur & Llandysul	2	2	0
Rheidol, Ystwyth & Caron	10	1	5
<b>TOTAL</b>	<b>40</b>	<b>14</b>	<b>21</b>



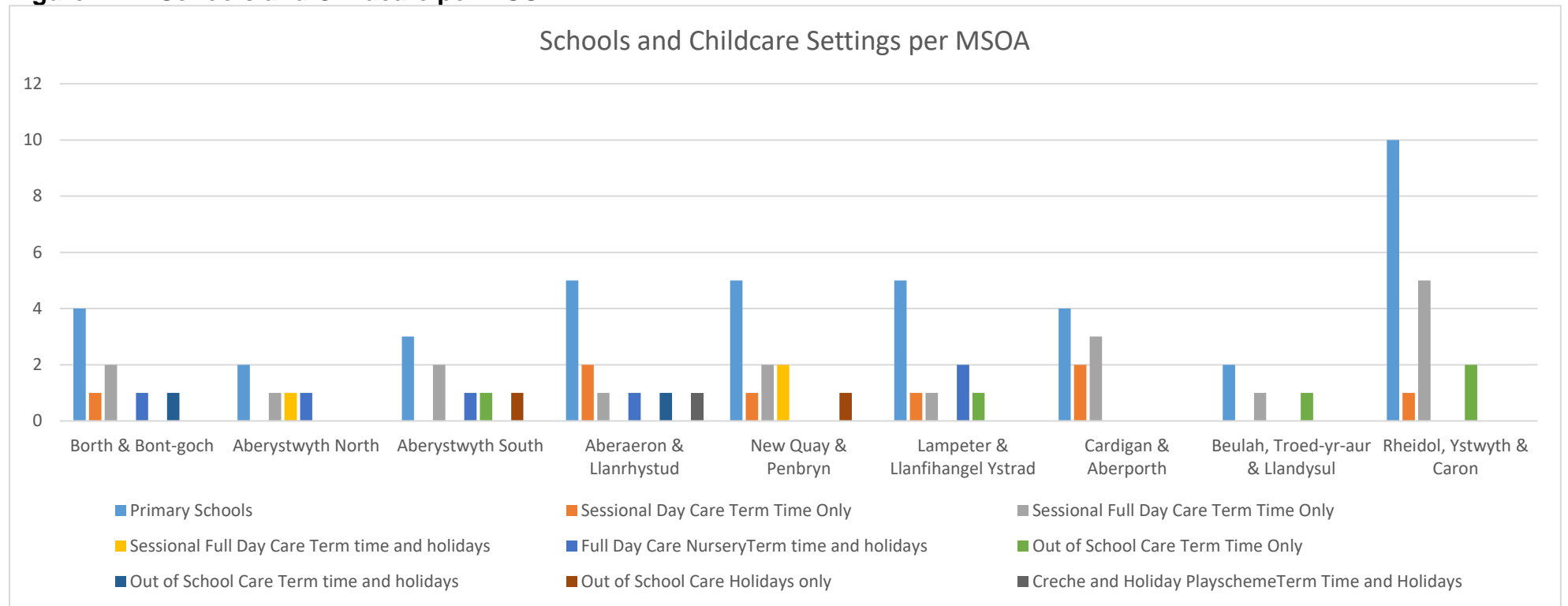
**Figure 17.1: Provision of Foundation Phase Nursery (FPN) Education for 3-year-olds per MSOA in Schools and Childcare settings**



**Table 17.6: Schools and Childcare per MSOA:**

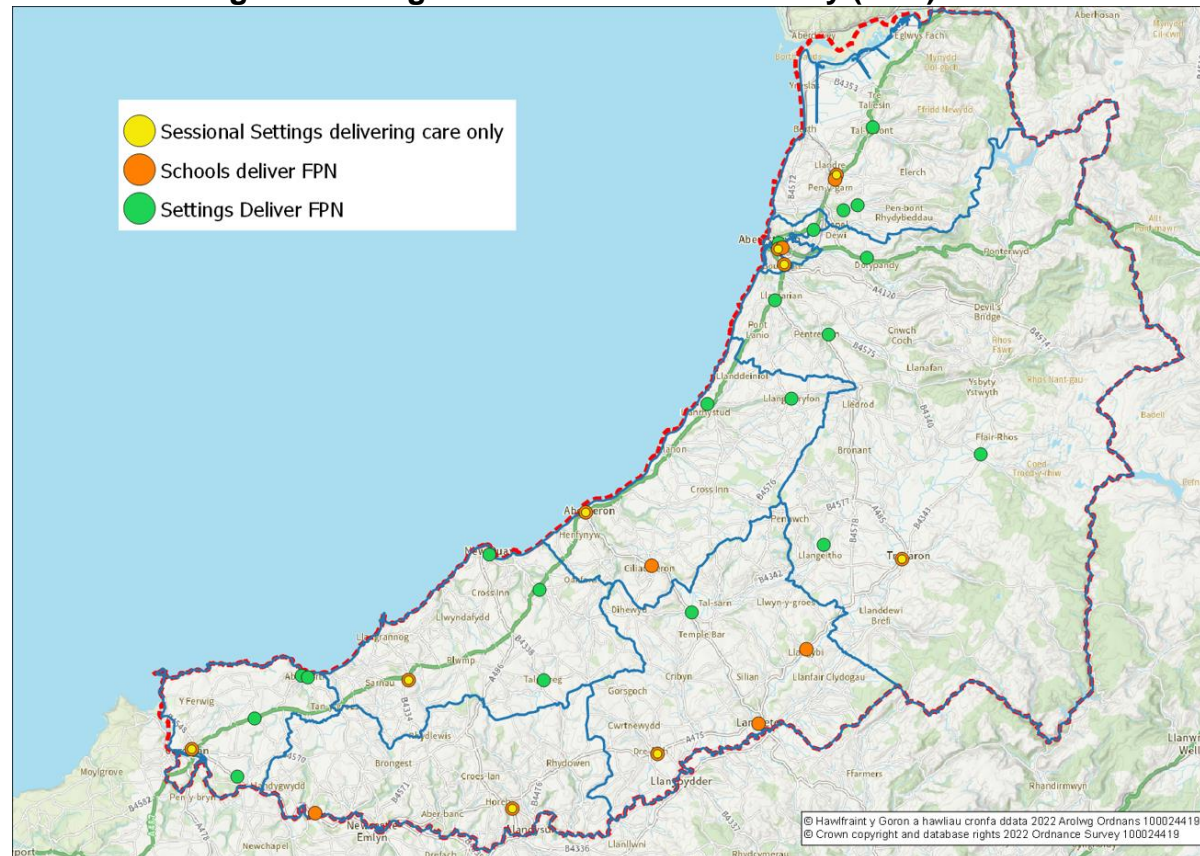
		<b>Borth &amp; Bont-goch</b>	<b>Aberystwyth North</b>	<b>Aberystwyth South</b>	<b>Aberaeron &amp; Llanrhystud</b>	<b>New Quay &amp; Penbryn</b>	<b>Lampeter &amp; Llanfihangel Ystrad</b>	<b>Cardigan &amp; Aberporth</b>	<b>Beulah, Troed-yr-aur &amp; Llandudul</b>	<b>Rheidol, Ystwyth &amp; Caron</b>	<b>TOTAL</b>
<b>Primary Schools</b>		4	2	3	5	5	5	4	2	10	<b>40</b>
<b>Sessional Day Care</b>	Term Time Only	1			2	1	1	2		1	<b>8</b>
<b>Sessional Full Day Care</b>	Term Time Only	2	1	2	1	2	1	3	1	5	<b>18</b>
<b>Sessional Full Day Care</b>	Term time and holidays		1			2					<b>3</b>
<b>Full Day Care Nursery</b>	Term time and holidays	1	1	1	1		2				<b>6</b>
<b>Childminder</b>	Term Time only			1							<b>1</b>
<b>Childminder</b>	Term Time only / After school							1			<b>1</b>
<b>Childminder</b>	Term time and holidays	5		5	6	3	3	12	7	2	<b>43</b>
<b>Out of School Care</b>	Term Time Only			1			1		1	2	<b>5</b>
<b>Out of School Care</b>	Term time and holidays	1			1						<b>2</b>
<b>Out of School Care</b>	Holidays only			1		1					<b>2</b>
<b>Crèche and Holiday Playscheme</b>	Term Time and Holidays				1						<b>1</b>
<b>Crèche</b>	Term time only							1			<b>1</b>
	<b>TOTAL Childcare settings</b>	<b>10</b>	<b>3</b>	<b>11</b>	<b>12</b>	<b>9</b>	<b>8</b>	<b>18</b>	<b>10</b>	<b>10</b>	<b>91</b>

**Figure 17.2: Schools and Childcare per MSOA:**



There are 14 schools delivering three-year-old education throughout the county. 12 of the schools are Welsh medium schools with two schools in the north of the county identified as English medium with significant use of Welsh.

**Figure 17.3: Schools and Childcare settings delivering Foundation Phase Nursery (FPN) education:**



### Number of parents not claiming their free entitlement and reasoning

The Local Authority do not collect information on the number of children not claiming their free entitlement. However, the Parent/Carer Survey asked whether their “*child(ren) age 3 or 4 accessing funded early education place at school or nursery?*” 157 were accessing the service or about to start, and 37 did not.

There was confusion between early education entitlement and the Childcare Offer in this section; but some respondents had concerns such as not knowing how to apply to the school, and that there was no Cylch at the school for the child to attend.

**Table 17.7: Parent/Carers accessing early years education:**

<b>Is your child(ren) age 3 or 4 accessing funded early education place at school or nursery?</b>	
Yes, In same local authority as I live	141
Yes in a different local authority to where I live	2
Will start soon	14
No	24
Not sure	7
Not applicable	6
<b>TOTAL</b>	<b>194</b>

**Q. If choose not to, why? (16 responses) including**

*Due to Covid, there wasn't really an opportunity, and he is shortly turning 4, so didn't seem worth it*

*Will when turns 3*

*The school doesn't have a 'cylch'*

*Gets the 10 hours but have applied for the 30hrs as husband is self-employed and it's difficult to get the paperwork to complete the form.*

*Was denied*

**Childcare required by parents to enable them to claim their full entitlement**

The COVID pandemic had affected the ability of children to attend an education setting, but most responses indicated the frustration from self-employed parents who wanted to take advantage of the full 30 hours Childcare Offer

It was hoped that the Childcare Offer would provide parents with clarity about the difference between early education and Childcare, but there is still some confusion on eligibility, and the difference between both elements of the Offer.

**ACTION:** The term before child is eligible arrange information sessions for parents with Childcare settings so that they can explain the Offer to parent/carers.

**Table 17.8: Schools which have Childcare provision available on site or close by in a neighbouring venue either provided by a Day Nursery or another provider - SUMMARY TABLE**

Name of School	School Provide the Three year old education	Language	School Breakfast Club Food funded	School Breakfast Club food funded	School Breakfast Club Care only	Cylch Meithrin / Playgroup	Location of Cylch / Playgroup	Lunch Club Cylch	After School Club	Wraparound provision	Wrap-around provision	Holiday Provision in area	Childminders that offer after school care	Childminders that offer before school care
40 schools	14 schools offer FPN		16	4	10	27 + 1 un registered + 1 Sessional Outdoor		14	10 on site - 2 in nursery		3	12 Holiday providers (covers 13 school areas including specialist DASH x 2)	25	14

\*12 Holiday providers (covers 13 school areas including specialist DASH x 2)

14 schools offer FPN

10 ASC on site with 2 in local Day Nurseries

**Table 17.9: Schools which have Childcare provision available on site or close by in a neighbouring venue either provided by a Day Nursery or another provider - FULL RESULTS per MSOA:**

MSOA Community	Name of School	School Provide the Three year old education	Language	School Breakfast Club Food funded by WG / LA	School Breakfast Club food funded by school budget	School Breakfast Club Care only	Cylch Meithrin / Playgroup	Location of Cylch / Playgroup	Lunch Club Cylch	Registered After School Club (ASC)	Wraparound provision available in the school	Wrap-around provision available in neighbouring Nursery	Holiday Provision in area	Childminders that offer after school care	Childminders that offer before school care	Comments
Aberaeron & Llanrhystud	Aberaeron	Yes	W	Yes			Yes	School		Yes			Yes	1		
	Ciliau Parc (Ciliau Aeron)		W			Yes										Attend CM Ynys y Plant
	Llangwryfon		W		yes		Yes	Village Hall								
	Llanon		W			yes										Attend CM Glan y Mor
	Myfenydd Llanrhystud		W			Yes	Yes	School site	Yes							
Aberystwyth North	Comins Coch		EM		Yes		Yes	School site		Yes			Yes			
	St Padarns		EM	Yes			Yes	Other site	Yes	Yes			Yes			

Aberystwyth South	Llwyn yr Eos (Penparcau)	Yes	EM	Yes			Yes	School site	Yes				DASH	1	1	Attend Ffrindiau Bach yr Eos for wrap around - New Cabin opened 2022
	Plascrug	Yes	EM	Yes							Un registered ASC					Attend CM Aberystwyth or St Padarns for wrap around
	Ysgol Gymraeg Aberystwyth	Yes	W	Yes				Other site		Yes		Yes	Yes	1	1	Attend CM Aberystwyth for wrap around
Beulah, Troed-yr-aur & Llandysul	Bro Teifi (Llandysul)	Yes	W	Yes			Yes	School	Yes	Yes			Yes	7	4	
	Cenarth	Yes	W	Yes			Yes	School - not yet registered								New build Cylch Meithrin (Awaiting registration)
Borth & Bont-goch	Craig yr Wylfa (Borth)		W													
	Penrhyncoch		W			Yes	Yes	School site	Yes	Yes				1		
	Rhydypennau	Yes	W			Yes	Yes	School site		Yes			Yes			



		Talybont		W			Yes	Yes	School site			Un registered ASC					
Cardigan & Aberporth		Aberporth		W	Yes			Yes x 2	Village Hall & Flying Start building					2	1		
		Aberteifi	Yes	W	Yes			Yes	Integrated Children Centre	Yes				7	4		
		Llechryd	-	W				Yes	School			Un registered ASC					
		Penparc		W	Yes			Yes	School site	Yes							
Lampeter & Llanfihangel Ystrad		Bro Pedr (Lampeter)	Yes	W	Yes							Yes	Yes	1			Wrap-around at Meithrinfa Seren & Y Dyfodol
		Dihewyd		W													Attend CM Ynys y Plant
		Dyffryn Cledlyn (Drefach)	Yes	W	Yes			Yes	School	Yes	Yes						NEW school since last CSA
		Felinfach		W				Yes	School site					1	1		

		Y Dderi (Llangybi)	Yes	W	Yes							Yes	Yes			Wrap-around at Y Dyfodol
New Quay & Penbryn		Bro Sion Cwilt (Synod Inn)	Yes	W			Yes						DASH			
		Cei Newydd		EM	Yes			Yes	Near Village Hall	Yes			Un registered ASC		Yes	
		Llanarth		W	Yes			Yes	School site	Yes						New Cabin
		T. Llew Jones (Brynhoffnant)	Yes	W		Yes		Yes	School					Yes		
		Talgarreg		W	Yes			Yes	Village Hall						2	1
Rheidol, Ystwyth & Caron		Henry Richard (Tregaron)	Yes	W				Yes	School site	Yes						Newly built building for Cylch Meithrin on Campus
		Llanfarian		W				Yes	School site	Yes						
		Llanfihangel y Creuddyn		W												
		Llanilar		W		Yes		Yes	School site		Yes					
		Mynach (Devil's Bridge)		W											1	1

	Penllwyn (Capel Bangor)		W			Yes	Yes	School site		Yes							
	Pontrhydfendigaid		W				Yes	Village Hall	Yes								
	Rhos Helyg (Llangeitho)		W			yes	Yes	School site									Attend CM Llangeitho
	Rhos y Wlad (Bronant)		W			Yes											
	Syr John Rhys (Ponterwyd)		W														Attend CM Penllwyn
<b>RESULTS /TOTALS</b>	<b>40 schools</b>	<b>14 schools offer FPN</b>		<b>16</b>	<b>4</b>	<b>10</b>	<b>27 + 1 unreg</b>		<b>14</b>	<b>10 on site - 2 in nursery</b>		<b>3</b>	<b>12 Holiday providers (covers 13 school areas inc DASH x 2)</b>	<b>25</b>	<b>14</b>		
<b>KEY</b>	W =Welsh		EM = English Medium with significant use of Welsh				CM = Cylch Meithrin										

**Source: SASS July 2021 data**

Some schools do not have a Cylch Meithrin on site. However, children do attend neighbouring Cylchoedd Meithrin but will then go on to their local school rather than the school of where the Cylch is located. Many parents value the benefit of keeping their children in the local school. The following table is a summary of the results from the table above.

**Table 17.10: A summary of the information from the tables above:**

Total number of primary schools (including 3-16 and 3-19 schools)	40
Total number of schools with a breakfast club	20
Total number of schools with a breakfast club (no food)	10
Total number of schools with a REGISTERED After School Club	8 (not all open)
Total number of schools with an UNREGISTERED after school club	3
Total number of After School Clubs in a Day Nursery	4
Total number of schools providing 3 year old education	14
Total number of schools with Wrap-around provision	19
Total number of schools with a Cylch Meithrin	29
Total number of UNREGISTERED Cylchoedd Meithrin	1
Total number of schools with a Sessional Care setting in the School	5 + 1 unregistered
Total number of schools with a Sessional Care setting on the school site	15
Total number of schools with a Sessional Care setting in another venue	8 + Sessional Outdoor Day Care
Total number of schools with a Childminder collecting children	25 deliver after school care  14 deliver before school care

**Stakeholder comments:**

*Childcare on school sites needs to be considered from the early planning stages, engaging with relevant stakeholders to ensure the space is designed in a CIW registerable way and there needs to be continued partnership working between Education and Childcare to ensure that community needs can be met in terms of both education AND Childcare. This needs to include consideration of local Childcare that is not able to be based on school-sites to ensure that displacement does not occur.*

*There was a Transition meeting last term at Ysgol Bro Pedr and over 12 children starting in September 2021 were not in any Childcare provision so there was no previous information about them. We feel strongly that a non-maintained setting is needed in Lampeter.  
Placements find it difficult to recruit new staff without qualifications let alone staff who are qualified to NVQ L3 and 5.*

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**ADDITIONAL LEARNING NEEDS (ALN)**

All Childcare settings are expected to meet the needs of all children within their provision. The following analysis explains the support available within Ceredigion to ensure that children with an additional learning need can access mainstream Childcare provision.

Due to the introduction of Additional Learning Needs and Education Tribunal (Wales) Act 2018, the Local Authority must appoint an Early Years Additional Learning Needs Lead Officer (EYALNLO) to be responsible for the pre-school children identified with additional learning needs. This position commenced in post autumn 2020. The ALN Act is about ensuring the right support is put in place to help a child/young person and ensuring that schools/Childcare settings become more inclusive making reasonable adjustments to meet the needs of all children.

The Childcare Unit has worked closely with the EYALNLO to deliver specific training for Childcare professionals this has included all settings and many childminders. The feedback to the training has been positive with providers reporting that they are now more aware of the ALN Code and feel more confident in raising a concern regarding a child's development with parents.

**Disabled Children**

Up until June 2021, Ceredigion Tim Plant Anabl operated as a joint team of health board staff and social care staff, and supported children and families with their identified needs, whether they be social, health or educational by allocating the most appropriate support.

Ceredigion Tim Plant Anabl was restructured in June 2021 and the Specialist Health Practitioners supporting children and young people with additional needs / disabilities **and** additional health needs moved to a new team called **Tim lechyd Plant Anabl / Children's Disability Health Team (TIPA/ CDHT)**. This was in order to maximise the resources of the small team of Hywel Dda University Health Board resources to deliver the health agenda and support those with significant health difficulties. CDHT and the Disabled Children's Team although no longer an integrated team, continue to work closely together and meet weekly to triage and discuss all new referrals.

## **CYNLLUN CYFEIRIO**

The Cynllun Cyfeirio referral programme supports children aged 2-4 with a disability and / or additional needs to take part in educational play and learning opportunities during term time in a pre-school registered setting.

Referrals are made by professionals, parents or staff of pre-school settings to a multi-agency Panel for approval.

The scheme is funded by Welsh Government Children and Communities Grant (Flying Start and Families First programmes) and Ceredigion County Council (Porth Cymorth Cynnar and School Services) funds and is managed by Mudiad Meithrin (new contract has been awarded up to March 2024). The funding can be used to pay for early intervention or additional support (Helping Hands) staff. In Flying Start settings, Core staff monitor children's progress using Foundation Phase Profile and Wellcomm Screen (for language).

The scheme experienced an increased number of children with delayed development coming in to pre-school settings during 2021/22, probably due to the impact of Covid restrictions. This resulted in increased financial pressure on the scheme. An additional 24.8% of funding was required to ensure that each child referred to the scheme could benefit.

With the increase in National Minimum and Living Wage, National Insurance and on-costs in 2022-2023 this may not be sufficient to provide the current level support in the pre-school settings. The extra support and funding received for the Covid-recovery programme will be available for one more year only.

### **Speech and Language in Maintained settings**

Over the years, most pre-school children in Ceredigion attended Cylchoedd Meithrin across the county until they turned 4 years old. When attending Cylchoedd Meithrin, children with Speech Language and Communication Needs (SLCN) were referred to the Cynllun Cyfeirio scheme and accessed the helping hands support. Cylchoedd were offered funding so that a member of staff could follow a speech and language therapy programme within the setting on a regular basis. This helped develop children's SLCN before they started school on a full-time basis at the age of 4 years old.

Now, many children attend one of the 14 school based 3–4-year nursery classes which are part of mainstream schools across Ceredigion, and this is likely to increase in coming years. No funding is available to support a scheme like Cynllun Cyfeirio in the maintained settings. There is therefore a need to support staff in the maintained settings to further develop their skills to help support children who present with SLCN.

Funding through the Child Development Grant has enabled the EYALNLO to establish a 'Rhwydwaith Meithrin / Nursery Network, which started in autumn 2021. The purpose of the network is to share good practice, provide training etc. Amongst Nursery Class Teachers in the maintained sector.

### **Strengths**

- Ceredigion has a high number of non-maintained settings that provide quality Early Years education through the medium of Welsh. There are only 3 settings that are predominantly English with some use of Welsh.
- There are enough places available for children to access the part-time funded education either through a non-maintained setting or in a maintained setting
- The settings reacted positively to the introduction of the Childcare Offer in 2018 by extending their sessions and opening hours in relation to parents' demand, and re-registering as Sessional Full Day Care.
- Most children in Ceredigion attend pre-school provision. Very few attends full time school without having attended any pre-school provision.
- The numbers of children attending non-maintained settings have risen back to the pre-pandemic numbers
- The recently created area schools can provide the three-year-old education alongside the wrap-around provision of a lunch club and a Cylch Meithrin in the afternoon and provide parents with access to 'full-day' care provision (school hours). However, the after-school provision has not been as successful, with some not re-opening since the COVID-19 pandemic. However, steps are being taken to address this by joint working between the schools and the Childcare Unit.
- The support offered by the Early Years Advisory teachers is crucial to the non-maintained sector.
- Children with additional learning needs attending non-funded early education can access additional support for up to 10 hours per week in pre-school settings term-time only.

### **Weaknesses**

- Increase in the number of schools providing three-year-old education impacts the sustainability of the non-maintained sector.
- The current model of voluntary run committees to be responsible for all aspects of running a Childcare setting is becoming more difficult to sustain. Committees are expected to be responsible for employment and staffing issues, fundraising, ensuring compliance of registration etc. and this is not sustainable.
- There is no support for children accessing early education through the maintained settings. This is a significant gap in support as identified by the Speech and Language Therapy (SALT) Team.

- The confusion between the education and Childcare element of the Childcare Offer at settings continues to be challenging, as each year presents a new cohort of parents, and the high staff turnover may add to the knowledge gap.
- Lack of understanding in the general population of the importance of high quality Childcare provision in the formative years. This leads to lack of status and respect for the qualifications and professionalism of practitioners.

Due to the vulnerability of the settings, qualified staff are looking elsewhere for more secure employment. Most settings are also voluntary organisations, with a huge burden on volunteer/committee members to manage the current and future delivery and provision of regulated, registered childcare for working parents.

The future sustainability of the settings is more related to Committee membership and management rather than demand from parents.

**ACTION: Need to work with Business Wales and Welsh Government on developing a pilot scheme for a robust structure for future provision.**

**ACTION: Over reliance upon Voluntary Committee run provision, an overhaul is needed of the Childcare infrastructure. Potential for Childcare Umbrella Organisations to consider taking on the responsibility for managing the settings.**

Many Sessional Day Care providers have operated under the ‘Cylch Meithrin’ model for many years (Mudiad Meithrin recently celebrated their 50 Years anniversary). However, demands driven by registration regulations under CIW during the last 20 years and Estyn requirements for those delivering 3-year olds education have increased significantly over this period and there is a need to consider if the model is fit for purpose.

**ACTION: Termly campaign for Setting staff/parents to explain the Childcare Offer.**

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## **FLYING START AND PATHFINDER PROJECT**

Flying Start is a Welsh Government programme aimed at tackling poverty in some of Wales’s most deprived areas and the funding currently sits within the Welsh Government Children and Communities Grant (CCG).

The programme has been running since 2006 and was originally introduced in three areas of the county in 2007 – Penparcau, Llanarth and Cardigan. In 2013 it expanded to a further two locations Aberporth and Llandysul. Of the five areas in Ceredigion 4 are based in the south of the county and 1 in in the north.



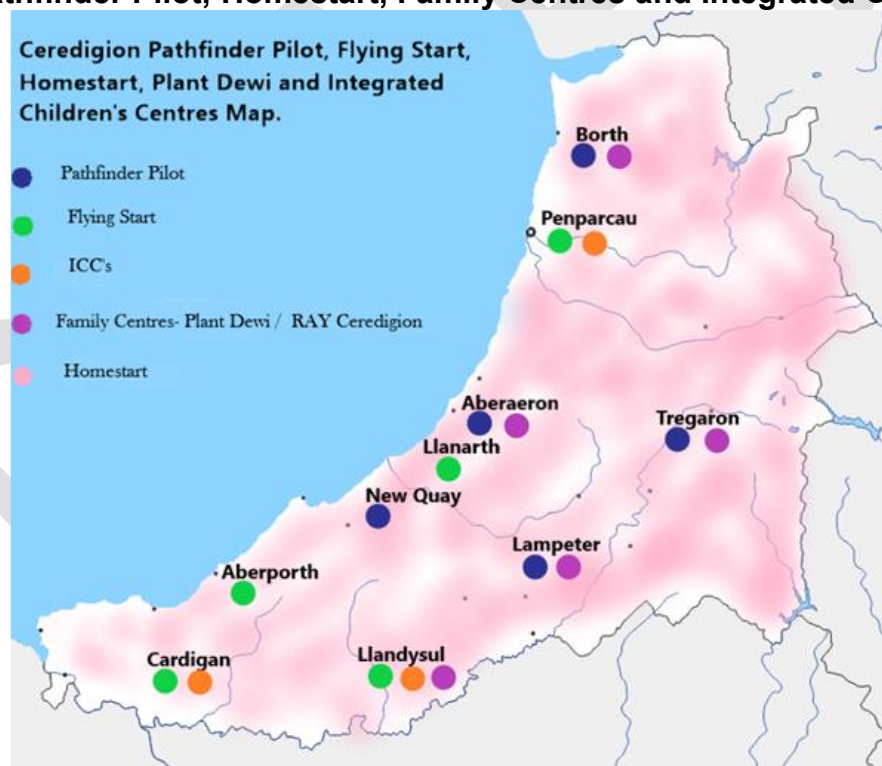
### Pathfinder Pilot Project

In April 2019 an Integrated Early Year's Plan based on multi agency working, developing an effective data and IT portal to coordinate consent for multi-agency support and key workers with families was created.

The 'Pathfinder' pilot project is a multi-agency approach to improve outcomes for targeted cohorts with a 'place-based approach' funded by Welsh Government for Carmarthenshire, Pembrokeshire and Ceredigion who are all within the Hywel Dda University Health Board footprint.

Five areas were identified in Ceredigion. Vulnerable families are referred by a Health Visitor for Family Support. These areas build on the existing Flying Start and Families First infrastructure. It has succeeded in improving relationships between sectors, improve community engagement and build safe and supportive environments, which will mitigate or reduce the long-term impact of Adverse Childhood Experiences (ACEs) and will address the barriers associated with delivery in Adverse Community Environments (ACEs).

**Figure 17.2.1: Map of Flying Start, Pathfinder Pilot; Homestart, Family Centres and Integrated Children's Centres**



The multi-agency approach aims to build both individual and community resilience to enable families to live safe, healthy and fulfilling lives where they can successfully raise their children and fully optimise their potential.

The pilot programme has been very well received by agencies working across the areas and this has resulted in some good outcomes e.g. - increased engagement with Family Centres., delivery of integrated multi-agency plans for supporting vulnerable families have been very successful e.g.

The Speech and Language Therapists (SLT) work as part of a multidisciplinary team alongside other health professionals e.g. Health Visitors and will work with families, carers, Family Support Workers, Family Centre staff, Childcare setting staff and other professionals to support children to develop their speech, language and communication skills.

Children are identified through a variety of means i.e. by WellComm trained Childcare staff, Health Visitor checks, queries from parents.

Childcare and family centre staff will be offered training e.g. Elklan, to provide them with strategies to support the communication development of all children, and to adapt the environment so that they are communication friendly settings. Parents and carers will be offered training through attending groups e.g. Babbling Babies.

The project funded a Social Emotional Wellbeing & Training officer (SEWTO). The Flying Start Advisory Teacher and Social, Emotional Wellbeing and Training Officer work in partnership to offer training to the staff from all settings within the pathfinder project areas.

**Transition** will be an important part of the SEWTO. Building positive relationships between parents and Childcare setting staff in partnership with the Health Visitors and Family Support Workers. Transition from home into nursery and the transition from nursery into school. Good practices from Flying Start will be adopted. During transition the importance of good attendance and sharing vital information will be crucial

**Table 17.2.1: Services per MSOA:**

Service	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel Ystrad	Cardigan & Aberporth	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
Flying Start			1		1		3	1		6

Family Centre	1			1		1		1	1	5
Children's Centre							1			1
Pathfinder Project	1			1	1	2			2	7
Integrated Children Centre			1				1	1		3

### Number of Childcare providers funded to provide Flying Start, including Flying Start only provision

Flying Start aims to provide all 2 – 3-year-old children living in the Flying Start geographical areas with a funded sessional Childcare place within approved Childcare settings. Ceredigion provides a mixed provision ranging from private day nurseries, Welsh and Bilingual Sessional/Sessional Full Day playgroups and childminders. Parents have a choice of where they send their child, and the funding follows the child.

During 2020/21 **27 Childcare settings** received funding through Flying Start (from **32 providers** who do receive Flying Start support when required). This differs from term to term depending on parental choice. Of those 27, 6 were Core Flying Start settings (i.e. they are within Flying Start areas), 9 provided sessional care, 2 are full day care nurseries and 10 are childminders.

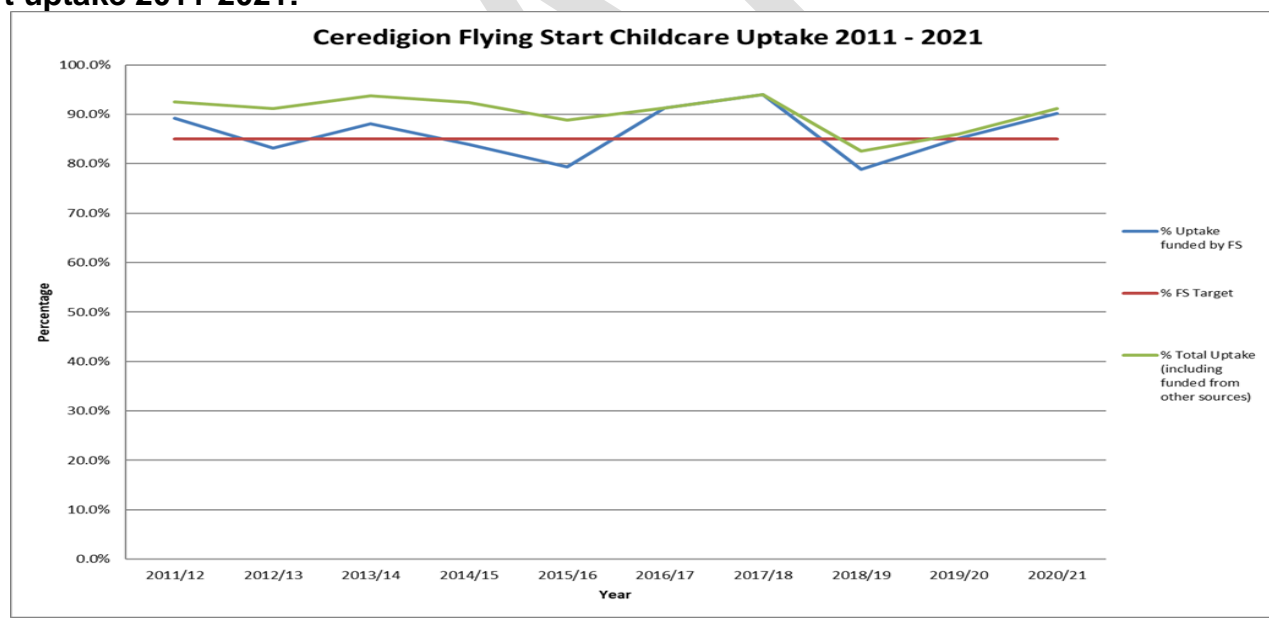
**ACTION: Childcare Unit to share responses from the Parent/Carer Survey with Flying Start Team for use in service planning and delivery.**

**Table 17.2.2: Childcare settings and Flying Start provision:**

Self-Assessment of Service Statement (SASS) data <b>Service Finance - Service Funding</b>	<b>Does the Service receive funding to provide Flying Start Places?</b>	<b>Are you a Service which provides Flying Start only provision?</b>	Borth & Bont-goch	Aberystwyth North	Aberystwyth South	Aberaeron & Llanrhystud	New Quay & Penbryn	Lampeter & Llanfihangel	Cardigan &	Beulah, Troed-yr-aur & Llandysul	Rheidol, Ystwyth & Caron	TOTAL
<b>Flying Start</b>												
Sessional Day Care	2	0					1		1			2

Sessional Full Day Care	13	0	1	2	2	0	2	0	3	1	2	1
Full Day Care Nursery	4	0	1	1	1			1				4
Childminder	13	0	1	0	4	2	0	0	4	2	0	3
<b>TOTAL</b>	<b>32</b>											<b>3</b> <b>2</b>

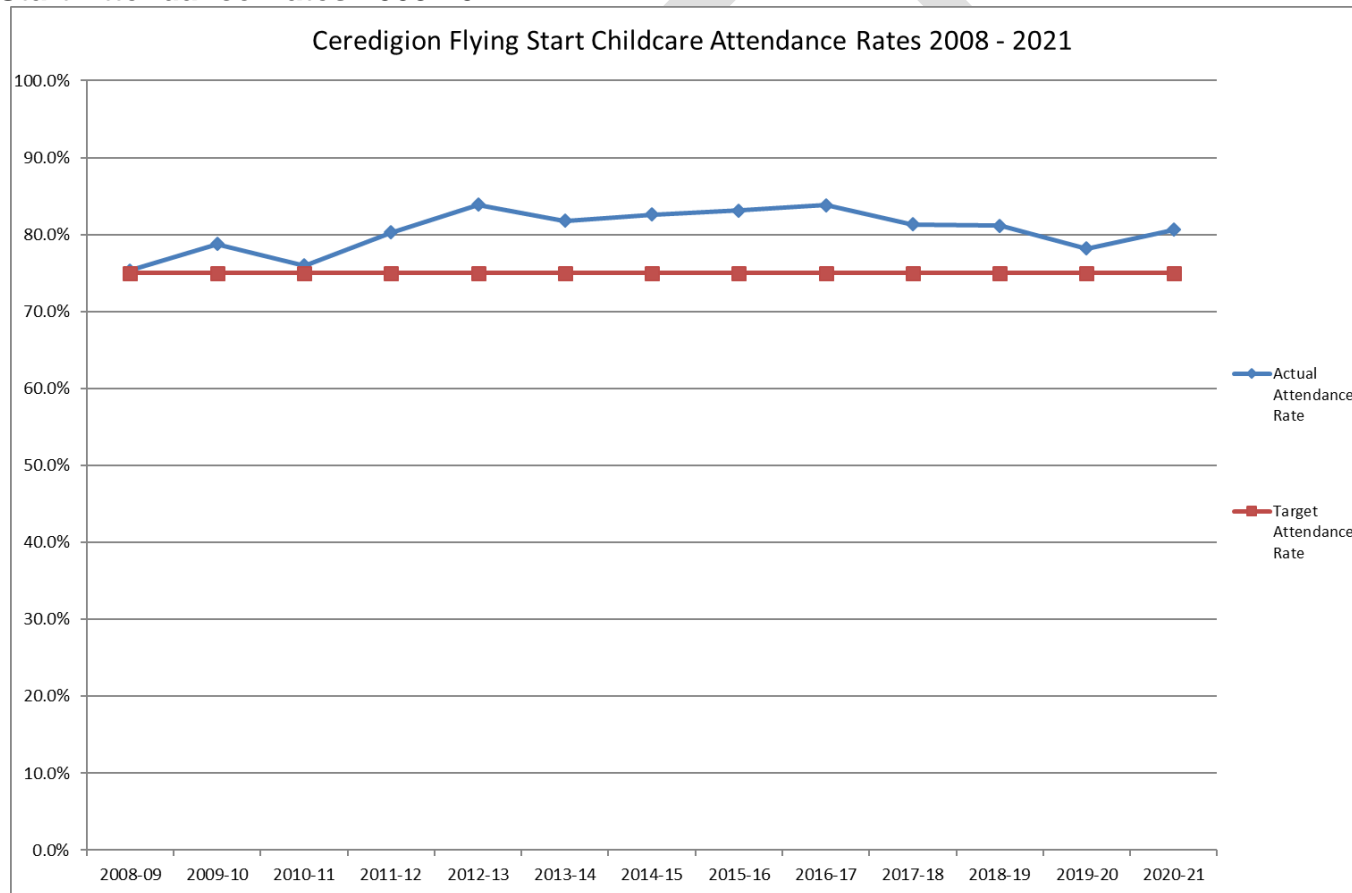
**Figure 17.2.2: Flying Start uptake 2011-2021:**



## Weekly attendance profile of children attending Flying Start provision

All Flying Start children are offered a funded Childcare place at a provider of their choice. Overall, 89% of children take up a Childcare place either funded by Flying Start or through other sources e.g. Universal Tax credits, Childcare Vouchers, Student Finance Childcare Grant. The following graph highlights good attendance rates of children attending Flying Start funded Childcare. It must be remembered that these are very young children and the last 2 years have been affected by the global COVID-19-19 pandemic. The attendance rates are above target. Fluctuation in take-up is also affected by population changes – as birth rates have been declining since 2015 (ONS data).

**Figure 17.2.3: Flying Start Attendance Rates 2008-2021**



**Table 17.2.3: Flying Start Evaluation:**

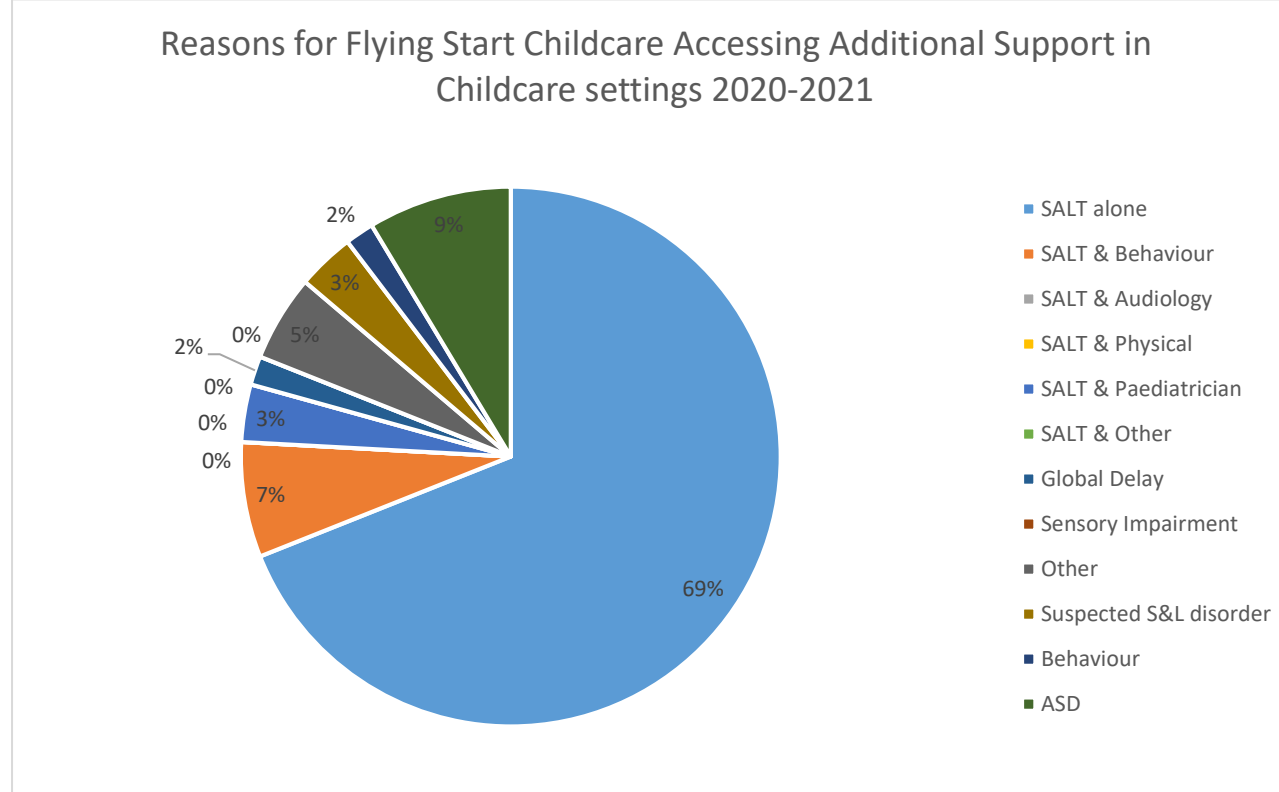
How much did we do?	2020/21	How well did we do it?	2020/21
<b>Indicators</b>	<b>#</b>	<b>Measures</b>	<b>%</b>
# of children offered a full offer of childcare	102	% of children offered childcare	100%
# of sessions funded	7,678	% taking up full offer of childcare	87%
# of sessions attended	6,188	% taking up part offer of childcare	3%
# of children taking up a full offer of childcare funded by Flying Start	89	% total uptake of childcare places funded by Flying Start	90%
# of children taking up a part offer of childcare funded by Flying Start	3	% total uptake of childcare places funded by FS and other agencies	91%
# of children taking up an offer of childcare <b>not</b> funded by Flying Start	1	% unauthorised absence rates	1%

Last year’s attendance was much better than anticipated especially as COVID-19-19 was causing anxiety in parents. 12 Childcare related training courses were delivered during 2020-21 with 124 Childcare workers completing the training. 23 settings were supported by FS Advisory teacher and Wellbeing and Training Support Officer.

**Figure 17.2.4** below demonstrates the percentage of Flying Start children receiving additional support through the Cynllun Cyfeirio.

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**Figure 17.2.4: Flying Start Children in receipt of Helping Hands through Cynllun Cyfeirio**



**KEY:** SALT – Speech and Language Therapist ASD – Autistic Spectrum Disorder S&L – Speech and Language

Health visitors - Recruitment challenges within Health Visiting is a risk associated with the Flying Start programme, and identified as a considerable risk factor to the delivery of the Healthy Child Wales Programme. There is also an impact on the Childcare sector where staff have to identify and address issues not previously identified due to lack of Health Visitor visits.

Local Authority and Health Board representatives have met with Welsh Government to highlight concerns. A recruitment campaign between the Health Board and Local Authority (+ Discover Wales) was carried out in 2021, but there is still a shortage.

**ACTION:** Work with Public Service Board Partner - Aberystwyth University are launching a nursing degree, and investigate option of developing the Health Visitor qualification in order to retain the learners who go on placement in Ceredigion whilst studying in Aberystwyth.

### **Childcare Outreach.**

Part of Flying Start's funding is to support families through Outreach funding. This is available only for families living within 5 km to a Flying Start Area. 27 out of the 28 referred cases were supported through FS Childcare Outreach during 2020-21.

In order to address the profound impact Coronavirus had on our most vulnerable children and families, Welsh Government introduced the Child Development Fund in Autumn 2020 which was introduced to assist with COVID recovery, and is monitored through our Parenting & Family Support framework. Part of the funding was used for Outreach, and has been invaluable in supporting vulnerable children in Childcare settings outside of Flying Start areas which has benefitted families from the whole of Ceredigion and Pathfinder areas, and used for upskilling the workforce in knowledge of the new ALN code. The Outreach funding element is managed by Flying Start.

This was initially a grant to LA's for a 6 month period to develop a package of support to help our most vulnerable families'. Funding was used to provide support to children and families to address concerns around developmental delays in areas such as speech, language and communication, motor skills, and personal and social development during the pandemic. This funding was extended until March 2022.

31 out of the 34 referred received Outreach support during 2020-21.

Other programmes supported by the Child Development Fund included funding support to the Play sector (to support the Play Sufficiency Assessment) and funding of resources for the childminders to support the ALN training they had received through the EYALNLO.

### **Strengths**

- Number of three-year-olds accessing their early year's entitlement is high.
- The quality of provision within the non-maintained settings is good or excellent.
- Settings are well-supported by the Early Years Advisory Teachers, Flying Start Advisory Teacher, Childcare Unit and Umbrella organisations development officers.
- Take up of Flying Start Childcare is high with good attendance rates.
- Child Development Fund has been of real benefit to support vulnerable families to access additional support – which included accessing Childcare provision.

### **Weaknesses**

- Sustainability of Childcare settings will be impacted if more schools provide the three-year-old education.



- Child Development Fund is a temporary measure to address developmental delays identified because of COVID-19 when children were unable to attend Childcare/socialise through other opportunities.
- Flying Start is a post coded service and not means tested. Many families in outlying areas of deprivation are missing out on additional support.

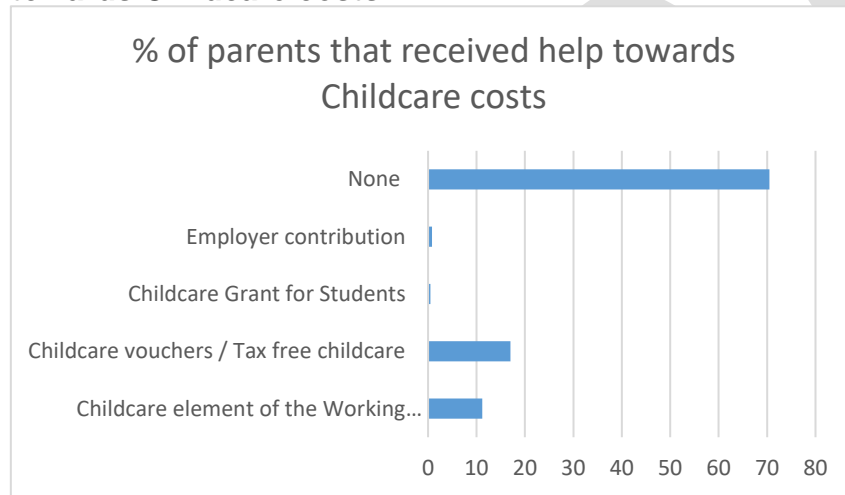
18

**WORKING TAX CREDIT/ UNIVERSAL CREDIT AND EMPLOYER SUPPORTED CHILDCARE/ TAX FREE CHILDCARE / CHILDCARE OFFER**

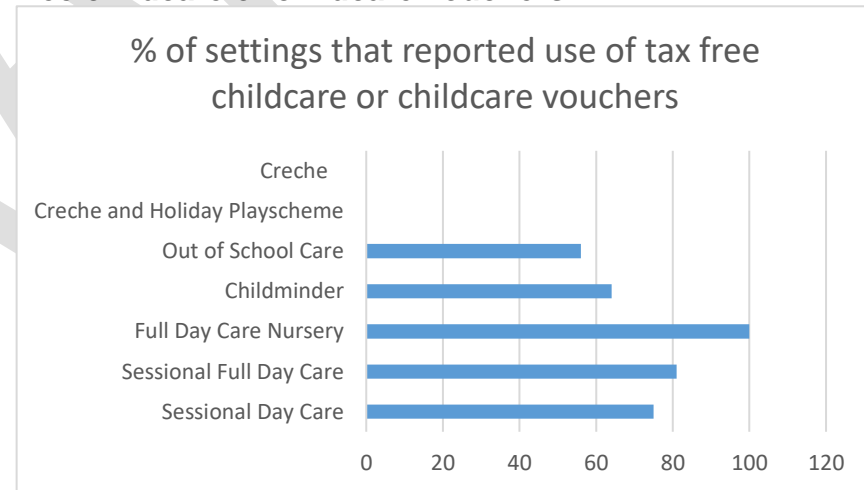
From the parent survey response 29.5% indicated that they received help towards Childcare costs from one or more of the following - Childcare element of the Working Tax/Universal Credit; Childcare vouchers / Tax free Childcare; Childcare Grant for Students or Employer contribution.

63% of settings reported that parents received tax free Childcare or used Childcare vouchers at their setting. The data on numbers of parents was not collected in the SASS submissions.

**Figure 18.1 - Percentage of parents that received help towards Childcare costs**



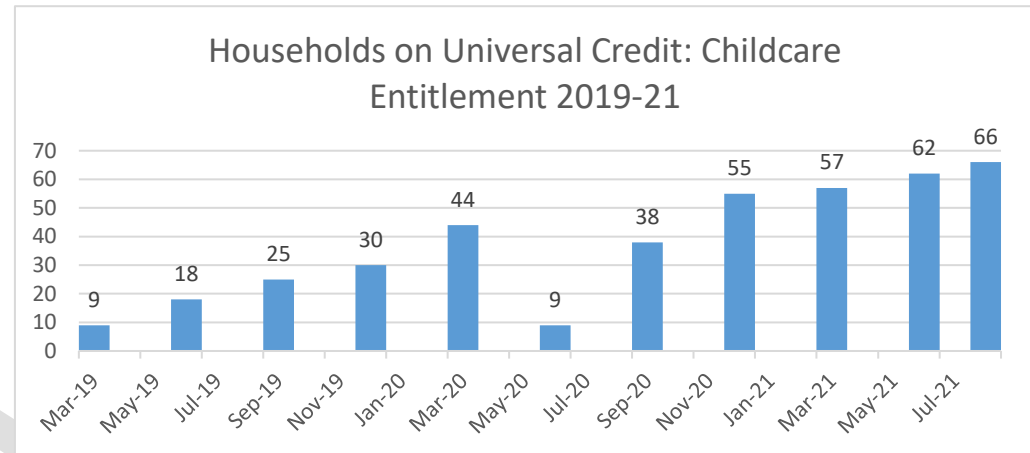
**Figure 18.2 - Percentage of settings that reported use of tax free childcare or childcare vouchers**



**UNIVERSAL CREDIT**

Table 18.1: Households on Universal Credit: Childcare Entitlement	Number
Mar-19	9
Jun-19	18
Sep-19	25
Dec-19	30
Mar-20	44
Jun-20	9
Sep-20	38
Dec-20	55
Mar-21	57
Jun-21	62
Aug-21	66

**Figure 18.3: Households on Universal Credit: Childcare Entitlement 2019-2021**



Source: Stat-Xplore: Ceredigion: Households on Universal Credit - Childcare Entitlement by month 2019-2021

The Number of households receiving the Childcare Entitlement is illustrated above. The numbers have increased since the pandemic (66 households) – which may be due to more awareness of support available since the pandemic. However, when analysing the number of families in work, the number of families per thousand out of work or receiving Working Tax Credit (WTC) and Child Tax Credit (CTC) has decreased between 2015 and 2020. Figures are not available for 2020/2021.

**ACTION: Raise awareness of the Tax-free Childcare initiative amongst Childcare providers and with parents as this supports Childcare costs for children 0-12 years of age.**

**ACTION: Investigate if the low take-up of the Childcare Offer is down to not wanting to impact accessing the Childcare element support of Universal Credit.**

**Table 18.2: Average number of benefiting families and annual entitlements in Ceredigion (in thousands, unless otherwise stated):**

In thousands, unless otherwise stated	Total out-of-work families	In-work families				Total in receipt (out-of-work and in-work families)
		With children		Of which, lone parents	With no children	
		receiving WTC and CTC	Receiving CTC only		Receiving WTC only	
2019/20	0.7	1.2	0.8	0.8	0.7	3.4
2018/10	0.9	1.5	0.9	0.9	0.8	4.2
2017/18	1.0	1.6	1.0	1.0	0.9	4.5
2016/17	1.0	1.7	1.0	1.0	1.0	4.7
2015/16	1.0	1.8	1.0	1.0	1.1	5.0

**KEY:** WTC – Working Tax Credit    CTC – Child Tax Credit

Source: Stat-Xplore

**Table 18.3: Number of children in recipient families**

thousands, unless otherwise stated	Number of children in recipient families		
	Total out-of-work families	In-work families	
		Receiving WTC and CTC	Receiving CTC only
2019/20	1.4	2.3	1.7
2018/10	1.7	2.8	2.0
2017/18	1.9	3.0	2.1
2016/17	1.8	3.1	2.2
2015/16	1.8	3.3	2.2

**Table 18.4: Families benefiting from Childcare element:**

thousands, unless otherwise stated	Families benefiting from			
	Childcare element			disabled worker element
	lone parents	couples	average weekly value (£)	
2019/20	0.1	0.1	£51.73	0.2
2018/10	0.2	0.2	£50.92	0.2
2017/18	0.2	0.2	£49.62	0.3
2016/17	0.2	0.2	£45.50	0.3
2015/16	0.2	0.2	£47.51	0.3

**Table 18.5: Average annualised value (£ per year)**

thousands, unless otherwise stated	Average annualised value (£ per year)						Total in receipt (out-of-work and in-work families)
	Total out-of-work families	In-work families			With no children	All in-work families	
		receiving WTC and CTC	Receiving CTC only	All families with children	Receiving WTC only		
2019/20	£6,316	£9,128	£3,951	£7,098	£2,969	£6,012	£6,077
2018/10	£6,101	£9,042	£3,915	£7,098	£2,880	£6,007	£6,028

2017/18	£6,163	£9,048	£3,811	£7,074	£2,892	£5,992	£6,030
2016/17	£6,176	£8,958	£3,875	£7,055	£2,853	£5,930	£5,983
2015/16	£6,228	£9,047	£3,884	£7,166	£2,913	£5,938	£5,996

## CHILDCARE OFFER

The Welsh Government [Childcare Offer](#) for Wales provides 30 hours a week of funded Foundation Phase Nursery (FPN) early education and Childcare for eligible working parents of three- and four-year-olds for up to 48 weeks of the year. The Offer was introduced in Ceredigion in September 2018, and increased the opportunities for parents to work more hours, enabled children more opportunities to access play and learning opportunities, as well as changing the landscape of the Childcare sector. Childcare Providers are paid £4.50 per hour for the Childcare booked hours.

Foundation Phase Nursery (FPN) also known as Three-Year-Old Education is delivered in both the maintained and non-maintained sector in Ceredigion. This means schools offer 12 ½ hours of FPN whilst the Cylchoedd Meithrin/Playgroups offer 10 hours FPN per week. The number of hours of Childcare a child receives is dependent on how many FPN hours they receive.

**Table 18.6: Childcare Offer and FPN breakdown:**

Element	Cylch Meithrin/Playgroup	Nursery class within a school
FPN	10 hours per week	12.5 hours per week
Childcare Offer	20 hours per week	17.5 hours per week
Total	30 hours per week	30 hours per week

An Additional Support Grant is available to support settings and for a child with additional needs to access additional support if required. Referrals are made to the Cynllun Cyfeirio panel for consideration of the support needed.

To ensure national consistency in approach for the Childcare Offer WG have commissioned the development of a national digital platform which will mean parents and providers across Wales will have access to the same service. Ceredigion will pilot the live test during the autumn term 2022 with a national rollout expected by January 2023.

The rate of £4.50 has remained since the offer started in 2017. However, a rate review is underway to look at increasing the hourly rate. An announcement is expected in the coming weeks. The review includes alignment with the FPN rate.

Parents/Carers must apply for the Childcare Offer, provide evidence for eligibility checks and ensure that there is space for their child by contacting the Childcare Provider directly.

The Childcare Offer makes payments directly to the Childcare provider. The Childcare Offer team deliver the Childcare Offer for Carmarthenshire, Pembrokeshire and Powys in addition to Ceredigion families.

The COVID-19 pandemic impacted the Childcare Offer as accepting new children for the summer term 2020 was temporarily suspended. The Childcare Offer was temporarily replaced by the Coronavirus Childcare Assistance Scheme (C-CAS) during the first pandemic 'lockdown' of April to August 2020 and provided funded Childcare for children aged under five of critical workers and vulnerable children. The children accepted onto this scheme are not all in the figures below as the scheme was open to children under 5 years old.

Ceredigion wages are below the Wales average when looking at average income and 'in-work' poverty is also an issue. As a result, this has an impact on the uptake of the Childcare Offer in Ceredigion as parents do not meet the income threshold. We also have a high percentage of self-employed workers and a high percentage of part-time workers who again find it difficult to demonstrate eligibility for the offer. The low wages within the area indicates that parents cannot demonstrate that they meet the income threshold of 16 hours at national minimum wage or living wage. We also have a number of family businesses where family members do not receive a weekly payslip etc. from the family business which means that they are unable to demonstrate the income eligibility.

Evidence gathered from the applications for the Childcare Offer is that parents in Ceredigion live in a minimum wage-based area. There is high self-employment, but many cannot reach the 16 hours living wage equivalent and have little scope to increase their hours. They therefore do not qualify for the Childcare Offer. The Local Authority has also witnessed a rise in children living in Poverty (See Sections 5, 6 & 18). Parents also report to the Childcare Offer team that remaining on the Universal Credit / Tax Free Childcare is more beneficial than applying for the Childcare Offer

As we deliver the Childcare Offer for four counties, it is evident that Ceredigion parents earn less income than neighbouring authorities. Very few parents are ineligible for the offer due to earning more than £100k. The Childcare Offer for 3–4-year-olds has highlighted the difference in

income between parents in the 4 local authorities. The introduction of the Childcare Offer has supported some providers to become more sustainable, where previously the Childcare providers were in a fragile financial position.

**ACTION: Monitor local take up of the Childcare Offer, compare national trends. Implement any actions needed to ensure all eligible parents can access the Childcare Offer. Welsh Government need to look at the eligibility to support working parents on low income.**

**ACTION: Work with WG to promote the new guidance being developed to inform agricultural families what information is required in readiness to apply for the Childcare Offer.**

**ACTION: Ensure all Childcare providers are ready for the new digital platform.**

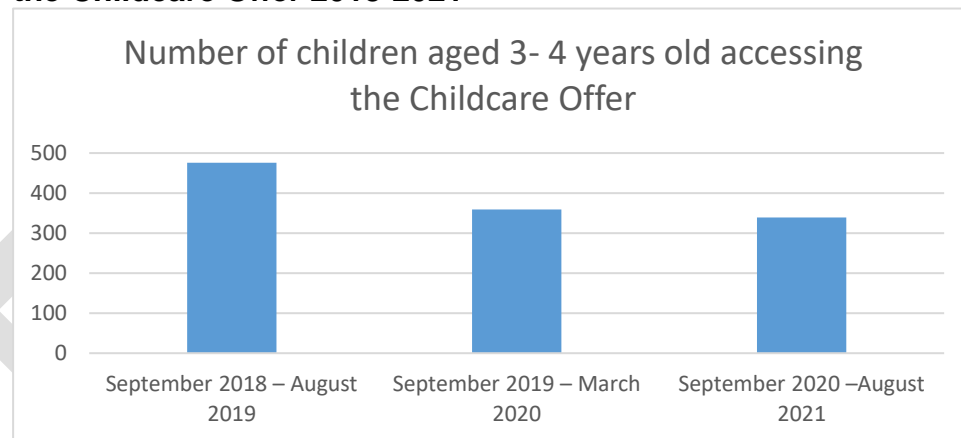
**ACTION: Childcare Unit require access to Social Media platform to raise awareness of the Childcare Offer. Opportunity to engage with Childcare providers, parents and employers to raise awareness of the scheme and other initiatives to help with help with Childcare costs to mitigate in-work poverty and reduce the percentage of children living in poverty.**

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**Table 18.7: Number of children aged 3- 4 years old accessing the Childcare Offer 2018-2021**

Ceredigion	Number of children aged 3- 4 years old accessing the Childcare Offer			
	Academic year	September 2018 – August 2019	September 2019 – March 2020*	September 2020 – August 2021
Number children		476	359	339

**Figure 18.4: Number of children aged 3- 4 years old accessing the Childcare Offer 2018-2021**



The Childcare Offer started in Ceredigion in September 2018, and there was a large number of applicants within two cohorts at the beginning of the scheme. The Covid-19 pandemic had an impact on the take up of the Childcare Offer from March to September 2020, but figures have improved and now settling into termly intake patterns.

**Table 18.8: Childcare Offer Wales and Ceredigion:**

	WALES	CEREDIGION
Number of children accessing the Offer in each local authority between September 2019 and March 2020	16,377	359 (2.19% of Wales take up)
Source: <a href="https://www.gov.wales">Evaluation of the Childcare Offer: Year 3 (gov.wales)</a>		
July 2021 % of those children estimated to be eligible for the Offer	48%	45%
		<i>Based on PLASC data of 3-year-olds in receipt of FPN April 2021 (Total of 526 in receipt of FPN)</i>



% children accessing the offer through Welsh or bilingually.	23%	77% (184 children)
Average number of hours booked and used per month	Just under 72 hours.	Just over 80 hours
Number of applications for children with SEN/additional needs	Just over 3%	0%
Percentage of children (%) in receipt of Childcare Offer Additional Support Grant	Not available	2%

### **Benefit for Childcare Settings:**

The introduction of the Childcare Offer changed the landscape of the Childcare provision. Many previous 'sessional day care' settings such as Cylch Meithrin/Playgroups were able to open longer hours / morning and afternoon sessions due to this increased demand from parents and funding support at £4.50 per hour per eligible child. This enabled settings to register as 'Full Day Care' with CIW which has changed the way we are able to measure Childcare places in Ceredigion. The hourly rate was also higher than what the sessional settings were charging parents. However, the amount was similar or less than the fees charged by Day Nurseries and Childminders.

During Autumn Term 2021, the Childcare Offer has paid £198,009.49 to 82 Childcare settings in Ceredigion (which includes support for children with additional needs); which is a significant saving in Childcare costs for each family on the Offer.

Anecdotal evidence from Advisory Teachers within Schools Service reported that since the introduction of the Childcare Offer, there has been a positive impact on the workforce. As hours have increased working hours at the setting, staff have been able to stay and have one job, instead of many jobs in various settings. Staff are at the setting all day, they are happier, and have more time to improve the resources and displays.

However, there is an increasing gap between the attainment of underprivileged children who cannot afford the Childcare sessions, and the children attending the Childcare element i.e. attending all day.

### **Expanding the Childcare Offer**

The Welsh Government Programme for Government 2021-2026 was published in June 2021 with two commitments; one to expand the amount of Childcare offer support offered for parents in education and training and another to maintain their commitment to Flying Start.

In Autumn 2021, a 'co-operation agreement' between Plaid Cymru and the Labour-run Welsh Government (December 2021 – 2024) was agreed. The agreement included plans to extend free Childcare to cover all two-year-olds (details yet to be confirmed at time of writing this Assessment). This action is supported by the Children in Wales [Annual Child and Family Poverty Survey Report](#) which highlighted 'expanding the Childcare offer to younger children' within its summary 'to support the rise in work poverty'

The second target affecting Childcare is the one on 'School Reform' which is exploring changing school term dates and school hours, which in turn will affect parents and Childcare provision.

**ACTION: Ceredigion Local Authority to work with WG on how to implement the funded Childcare for 2-year-olds across Ceredigion and help with planning any additional provision.**

**Investigate possible capital grant funding opportunities in line with further expansion of the Childcare Offer or 2 year old funding.**

**ACTION: Contribute to Welsh Government School Reform consultations and reviews and implement any actions**

**Feedback from Childcare Provider Consultation:**

*"Inadequate information regarding the funded spaces for parents. They don't get told about the holidays and how it works, and they don't understand how the funding works."*

*"I work within the community I live in to ensure that "word of mouth" and my reputation has been enough to keep me busy. Most parents go back to work between 9 months to a year after baby is born and then School settings and Meithrin now providing all day spaces for 3-year-old children. This means that the age range which childminders currently look after children is getting squeezed more and more. Parents want to share placements between Playgroups and Meithrin and I am now experiencing spaces within my setting for the first time."*

*"I have a waiting list for children Under 5 up until 2023. With me having 2 [children] of my own in this age bracket this only allows me to care for one more child under 5 years old following the ratio's. I have had no interest/enquiries for children aged over 5. There is a much greater need for Childcare spaces for younger children."*

Some Childminders have identified that the Childcare Offer is having a negative impact on their service as parents are favouring utilising the Offer within one setting which tends to be the full day care provision:

*“Childminder numbers are affected by local Cylch Meithrin accepting children from the age of 2 years. Parents often seeking wrap around care for these children which affects the child ratios.”*

## **POVERTY**

Households living in poverty is defined as when a household income is less than 60% of the GB median income. In 2020, this was £19,967. (Source: CACI Paycheck)

According to the Welsh Government 31% of children in families in Wales were living in relative poverty between 2017 and 2020. Growing up in poverty affects children’s well-being, their early year’s development, physical & mental health, educational achievement & future life chances. Recognising & understanding the effects of poverty on children & families is vital to improving their outcomes.

In Ceredigion, 3 in 10 children are living in poverty or 31.8% (Source: *End Child Poverty Coalition in 2019/20*). Next update due May 2022). This is not only higher than average for Wales, but Ceredigion has also seen the second highest increase nationally at 2.7% points over the previous five years. Poverty remains one of the biggest challenges for the county. Low earnings and incomes, affordable Childcare, Universal Credit reduction and high housing costs/ housing affordability are the drivers of poverty in Ceredigion.

‘*Ceredigion Tackling Hardship Strategy 2020-2022*’ recent progress report identified the following problems relating to Childcare:

- Low incomes in Ceredigion means that some families can’t demonstrate that they meet the income threshold for the Childcare Offer.
- A shortage of staff, including Welsh speaking staff, within the sector makes it difficult to recruit and maintain staff to child ratios. This is impacting on the ability of some settings to offer places to additional children.
- The Strategy recognised that Parents’ working patterns have changed and this has reduced the demand for after school Childcare. Two settings, in the North and South of the county, which supported many children with Additional Learning Needs have closed permanently.

Economic measures do not immediately highlight the issue of in-work poverty. For example, the economic activity rate, employment rate and the proportion of workless households in Ceredigion all perform better than the national average. Yet, there are still 32.4% of households living in poverty in Ceredigion\* compared to 35% in Wales. These figures, combined with low average earnings and incomes in the county strongly point to in-work poverty continuing to be a significant issue in Ceredigion.

6.9% of children are living in workless households (*The % of children living in workless households in Ceredigion is based on a low sample size and therefore these figures should be used with caution*).

**\*Sources:** *Department of Work and Pensions, NOMIS, Welsh Government, Welsh Index of Multiple Deprivation, Census 2011*

Median annual earnings in Ceredigion (by place of residence is £23,576 and is below the Wales median (Source: Office of national Statistics - Annual survey for hours and earnings 2020).

The number of people on Universal Credit has increased by 112% since March 2020, with 10.5% of working age people in Ceredigion receiving Universal Credit.

- Latest data available: Children living in poverty is currently 31.8% for 2019/20. next update is May 2022
- Self-employed is 1 in 6 as at March 2021 updated every 3 months.
- Ceredigion self-employment ratio is 14.9% compared to a Wales figure of 8.9%
- The take up rate of the Self Employment Income Support Scheme (SEISS) during the pandemic ranged from 76% for the first grant to 22% by the fifth grant (5500 potential claimants), but was lower than the Wales take-up rate in each claim.\*
- 23,700 employees were eligible for the Coronavirus Job Retention Scheme (furlough) where employees placed on leave received 80% of their pay, up to a maximum of £2,500 per month. Furlough scheme take up ranged from 6500 in May 2020 to 700 employees in September 2021. This equated to a 3% take up rate compared to the Wales rate in comparison which was 3.3%.\*
- Universal credit claimants rose by 112% from March 2020 to November 2021 with 4,477 people on Universal Credit (12% of population compared to 18% Wales\*\*

\***Sources:** Self-Employed Income Support (Furlough) Scheme - HM Revenue & Customs, Self-employed – NOMIS Local Authority Profile

\*\***Sources:** Universal Credit - Department of Work and Pensions ; Economic Activity – NOMIS; Employment Rate – NOMIS

**Table 18.9: Percentage of households living in poverty (below 60% GB median income:**

<b>MSOA Name / Community Area</b>	<b>Percentage of households living in poverty (below 60% GB median income £19,967)</b>
<b>Aberystwyth North</b>	<b>37.8%</b>
<b>Cardigan &amp; Aberporth</b>	<b>36.7%</b>
<b>Aberystwyth South</b>	<b>36.6%</b>
Lampeter & Llanfihangel Ystrad	35.9%
Beulah, Troed-yr-aur & Llandysul	33.8%

Rheidol, Ystwyth & Caron	29.0%
Aberaeron & Llanrhystud	28.9%
New Quay & Penbryn	28.4%
Borth & Bont-goch	25.6%
<i>Source: ONS Mid-Year Population Estimates, 2020.</i>	

Aberystwyth North has a high student population so caution must be taken when looking at these figures. The table below may be more representative of the level of poverty, supported by the fact that Flying Start is available in the top 3 areas listed below. However, Lampeter and Llanfihangel Ystrad area feature 4<sup>th</sup> in both lists suggesting this is an area where we need to develop additional support.

**ACTION: Investigate the possibility of establishing a Sessional Day Care provision for 2-3 year olds without impacting on the two Full Day Care Providers and Childminders in Lampeter. Further research into Childcare needs of families living in Lampeter and Llanfihangel Ystrad MSOA community.**

**Table 18.10: People in Income Deprivation %**

<b>MSOA Name / Community Area</b>	<b>People in Income Deprivation %</b>
<b>Cardigan &amp; Aberporth</b>	<b>19%</b>
<b>Beulah, Troed-yr-aur &amp; Llandysul</b>	<b>14%</b>
<b>Aberystwyth South</b>	<b>13%</b>
Lampeter & Llanfihangel Ystrad	12%
New Quay & Penbryn	12%
Aberaeron & Llanrhystud	11%
Rheidol, Ystwyth & Caron	10%
Borth & Bont-goch	10%

Aberystwyth North	6%
<b>TOTAL</b>	
<i>Source: ONS Mid-Year Population Estimates, 2020.</i>	

During spring 2021 Children in Wales undertook their annual Child and Family Poverty Survey which was published in Autumn 2021. 6% of the responses to the survey were from Ceredigion which highlighted cost/availability of Childcare as being within their top 5 poverty related issues. Other related issues included impact of benefits, low wages, debt and housing barriers and rising cost of living.

The survey highlighted how some parents had to give up jobs because of lack of, or affordability of additional Childcare or had to choose between working or providing Childcare. Low-income workers could not work from home.

The Impact of the COVID-19 pandemic resulted in redundancies, job losses in the seasonal industries; Childcare sector and those on zero hour's contract. However, poverty was there prior to the pandemic (albeit worse now) and cannot be used as an excuse.

With regard to *Childcare costs and availability* cited as an issue by respondents in the report, comments focussed on the high cost of Childcare compared to low-income employment, as well as the availability of Childcare. These comments focused not only on the geographical availability, but on the times of day that Childcare was available.

*"I work with a lot of single mothers who would like to work, but finding Childcare is very difficult and also the cost of the Childcare when they do find"*

**Case Study:**

Childcare professional working 16 hours a week on Minimum Living Wage was offered additional hours within a setting. On further investigation, the individual who was a single parent would be worse off financially if working more than 16 hours at minimum wage as would lose their Universal Credit, Housing Tax Benefits; Free School Meals (and associated Uniform grant)- The employee was willing to work more hours, but it was not a financially sustainable decision. Meanwhile, the setting continues to face staffing issues to meet ratios and hours required.

**Summary:**

There is a clear call for more affordable Childcare; with particular focus on expanding the Childcare offer to younger children. Childcare needs to be more accessible, with more flexible hours. Although evidence calls that Childcare needs to be more flexible, we need to investigate if the demand is there to make it sustainable. Without the number of families accessing the provision it is not sustainable to ask providers to extend opening hours etc. This would encourage more flexible working and support shift patterns; as well as better pay for the Childcare workforce.

**Strengths:**

- Schemes such as Flying Start, Early Education and the Childcare Offer are all funded Childcare provision which some parents can access.
- The introduction of funded part-time Childcare for two-year-olds will support families to access Childcare without having to worry about the cost.

**Weaknesses:**

- The rate of poverty and in-work poverty is increasing in Ceredigion this is likely to impact parents being able to afford Childcare as a result to rising costs. At the same time Childcare providers are having to consider increasing fees in order to ensure they can sustain the provision with all the additional on-costs they have to continue to meet.

**19 SUSTAINABILITY**

Sustainability can be described as the ability to be maintained at a certain rate or level. When we look at sustainability in respect of the Childcare market, we do consider the ability to maintain the provision we have and what factors can impact or influence the existence of Childcare provision.

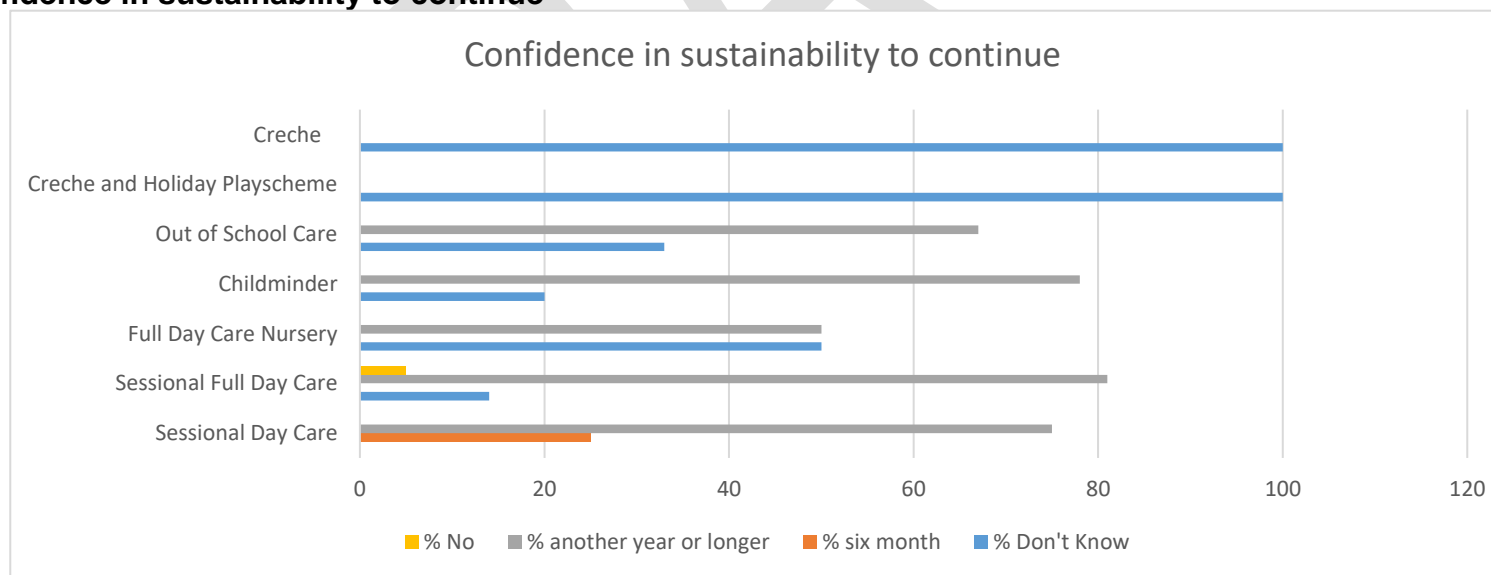
The SASS survey asked providers ‘based on the current situation, are you fairly confident that it would be financially sustainable to continue to run your Childcare provision for? The following table highlights the results of the survey.

**Table 19.1: Childcare Provider confidence to continue**

	% Don't Know	% six month	% another year or longer	% No
Sessional Day Care	0	25	75	0
Sessional Full Day Care	14	0	81	5
Full Day Care Nursery	50	0	50	0
Childminder	20	0	78	0
Out of School Care	33	0	67	0
Crèche and Holiday Playscheme	100	0	0	0
Crèche	100	0	0	0
<b>TOTAL</b>	<b>22%</b>	<b>2%</b>	<b>74%</b>	<b>1%</b>

It is encouraging to see that 74% are intending to remain operational for 6 months or longer. However, it is concerning that 50% of our full day care provision don't know how long they will be sustainable for. We have a low number of full day care providers within Ceredigion, therefore, if a provider was to close there would be a significant impact to Childcare places for parents, particularly as we see that the full day care providers are relatively full, and 2021 saw a closure of one Full Day Care provision which affected many families.

**Figure 19.1: Confidence in sustainability to continue**



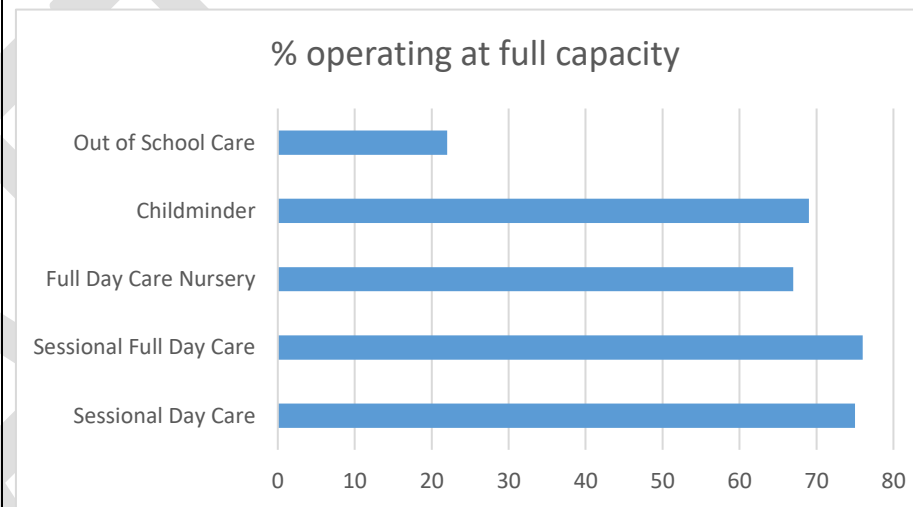


Providers were also asked as part of the SASS ‘due to COVID-19, are you currently operating at full capacity?’ The following table clearly demonstrates that none of our providers reported that they were operating at full capacity. With the out of school sector clearly affected the worst with only 22% operating at full capacity. Sessional full day care at 76% and sessional care at 75% reported to operating the closest to their full capacity in June 2021. This figure may have changed.

**Table 19.2: Percentage operating at full capacity**

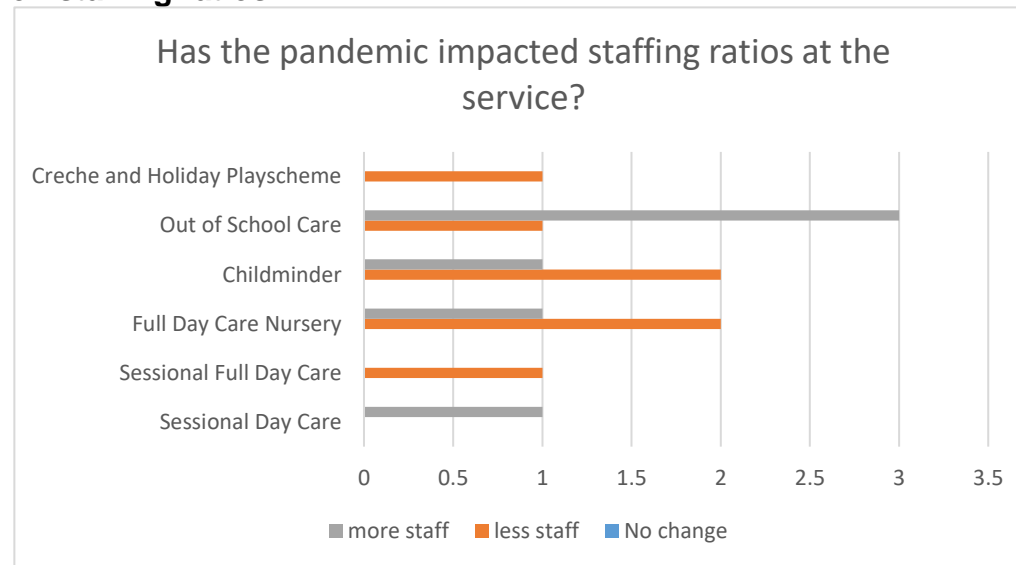
	<b>% operating at full capacity</b>
Sessional Day Care	75
Sessional Full Day Care	76
Full Day Care Nursery	67
Childminder	69
Out of School Care	22

**Figure 19.2: Percentage operating at full capacity**



The following graph demonstrates the impact COVID-19 has had on staffing within the sector. Again, the out of school sector has reported the need for more staff to child ratios. The reason for this was due to a period of time when children had to be kept in bubbles.

**Figure 19.3: Impact of pandemic on staffing ratios**



The sector has had a lot to deal with over the last two years as they adapt to new ways of working, updating risk assessments, implementing extra cleaning regimes, introducing COVID-19 secure measures whilst at the same time trying to provide the best possible care for the children.

One major impact on the sustainability is the wages. Childcare has for too long remained as a low paid profession, yet the expectations on staff continue to rise and ensure they have the right qualifications. If we are to ensure quality within a setting the pay needs to reflect the duties within the job.

Sustainability grants are awarded annually through Welsh Government and Local Authority funding who acknowledge the fragility of the sector, and the availability of grants is instrumental in ensuring that the costs of Childcare are not passed on to families, however, it is not sustainable to be awarding grants every year to the providers

### **National Living Wage; Hourly Rates and National Insurance:**

The National Living Wage (NLW) will rise to £9.50 from 1 April 2022. This represents an increase of 59 pence or 6.6 per cent. The increases will support the wages and living standards of low-paid workers at a time when pay growth is robust across the economy according to [Large minimum wage increase to boost low-paid workers' incomes - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/large-minimum-wage-increase-to-boost-low-paid-workers-incomes).

**Table 19.3: National Living Wage:**

Rate from April 2022	Current rate (April 2021 to March 2022)	Increase	
National Living Wage	£9.50	£8.91	6.6%
21-22 Year Old Rate	£9.18	£8.36	9.8%
18-20 Year Old Rate	£6.83	£6.56	4.1%
16-17 Year Old Rate	£4.81	£4.62	4.1%
Apprentice Rate	£4.81	£4.30	11.9%
Accommodation Offset	£8.70	£8.36	4.1%

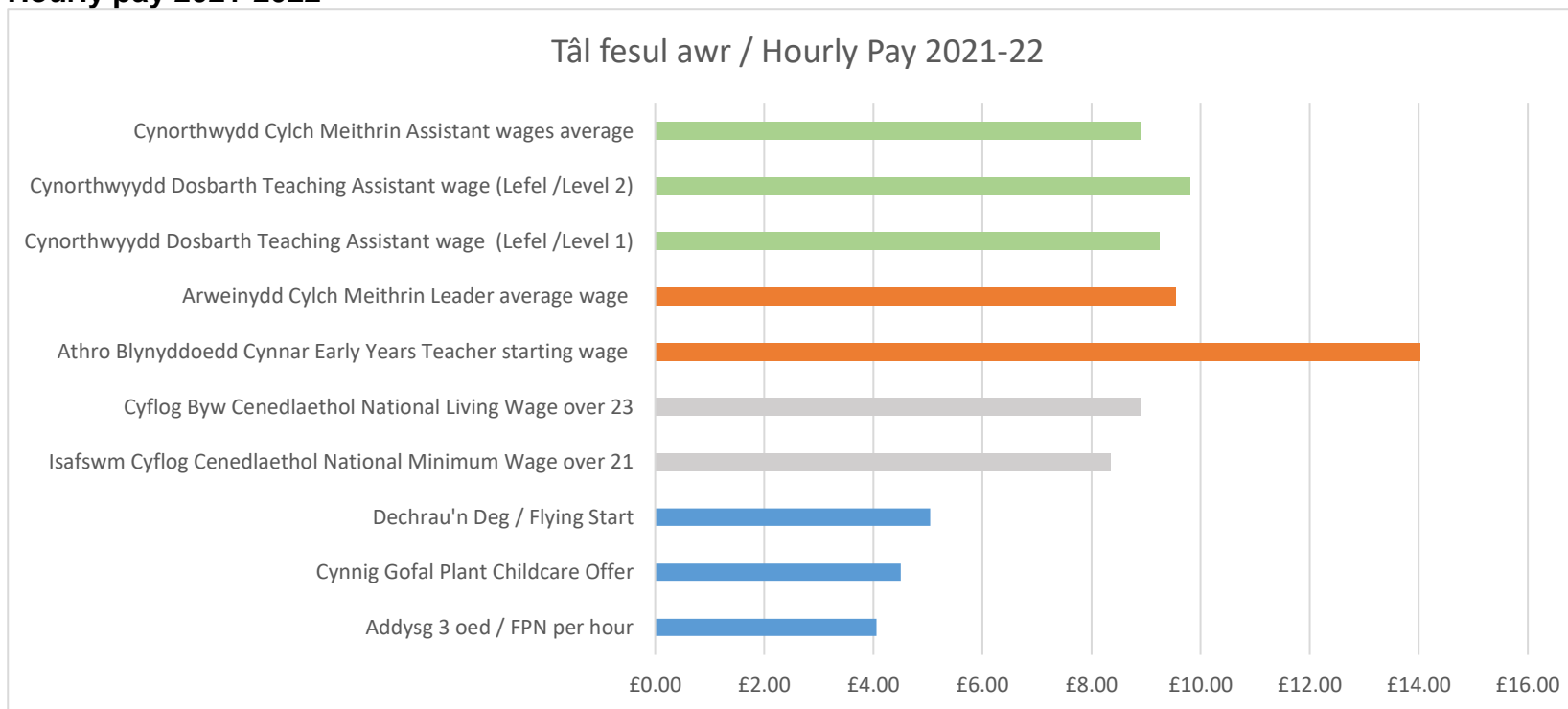
Source: [Minimum wage rates for 2022 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/minimum-wage-rates-for-2022)

Along with National Insurance contributions increasing by 1.25% in April 2022 the average increase in staff costs per day per employee on minimum wage will increase, and these additional costs will have to be met by all Childcare providers whether private or voluntary run settings. With utility and overhead costs also increasing this is not something that providers will be able to take on board without considering to increase the parent fees.

On costs must be considered when hourly rate and National Insurance contributions are increasing, and if working 16+ hours, consideration must be taken for pension and holiday contribution. However, Childcare settings cannot pass on this additional cost increase to parents. FPN education funding is being gradually increased to reach the £4.50 per hour, at the Local Authority's discretion, but will take another two years to reach this threshold. If the Childcare Offer rate is to increase, further funding will be required to ensure the FPN rate also increases.

The following table demonstrates the difference in hourly rates for staff within the Childcare sector in comparison to an Early Years Teacher starting salary at £14.00 per hour. A Cylch Meithrin leader averages around the £9.50 per hour whilst an assistant is just on national minimum wage. Compare this with the hourly rate for staff in retail and it is understandably why the sector is in crisis at the minute with qualified staff leaving the profession to go and work in schools or even out of Childcare completely.

**Figure 19.4: Hourly pay 2021-2022**



**Provider quote:**

*“We have spaces available in our after school club since the pandemic and with parents working from home we currently have less children requiring care. It’s then a fine balance to match staff numbers to child ratios and trying not to lose money on every session. It also appears to be costing the business more to provide 1 to 1 Childcare.”*

**Small Business Rates Relief for registered Childcare premises**

Since April 2019, registered Childcare providers in Wales received 100% small business rate relief. This scheme was for three years initially and confirmed up until 31 March 2022. In September 2021 Welsh Government Ministers announced a three year extension to 100% non-domestic Rates Relief for registered Childcare for an additional three years until 2025 following a review in July 2021. The extension of the

rates relief was welcomed news by providers, until 31 March 2025. This will provide £9.7m of additional support for registered Childcare premises in Wales.

### **Welsh Government Sustainability Funding**

WG Children and Communities Grant (CCG) is awarded to support Flying Start and Families First services, including Early Help and Support. One of the funding streams is to support the Childcare and Play programme, predominantly aimed at the Out of School sector, and addressing gaps in the CSA and PSA.

Funding is used for Development officer time; Supporting children with additional needs to attend an after school club/holiday Playscheme (Ymuno), subsidising training costs and supporting the sector by offering annual Sustainability Grants to cover staff and overhead costs.

Due to COVID-19 Additional grant support was awarded in the form of a CWTCH grant in 2020 of £135,486.00  
2021-2022 saw a 0.49% increase with a further CWTCH grant allocated in September 2021 as a small scale sustainability grants to help support Childcare settings recover from the impact of COVID-19.

**Table 19.4: Sustainability Funding:**

<b>Childcare &amp; Play Grant (Out of School Childcare grant)</b>		<b>Additional COVID-19 Funding</b>	<b>TOTAL</b>
2017-2018	£58,796		£58,796
2018-2019	£58,796		£58,796
2019-2020 CCG	£58,796		£58,796
2020-2021	£58,796	£58,796 + £76,690 £135,486.00	£194,282
2021-2022 – 0.49% increase	£59,084.46	£89,472	£158,556.46
2022-2023	£58,796.00 + Early Help of 5% of £2,939.80		

## **CHILDCARE OFFER CAPITAL GRANTS**

The introduction of the Childcare Offer provided an opportunity for LAs to apply for capital funding to develop new Childcare provision or funding to utilise a small grants scheme which would support Childcare providers to improve the environment within their setting. This funding has purely been for capital work. However, it has been of a significant benefit to Childcare providers in Ceredigion. Funding has allowed the development of an extension to Ysgol Cenarth to develop wrap around Childcare, purpose built building for Cylch Meithrin Tregaron, a permanent building to replace the cabin for Ffrindiau Bach yr Eos (Flying Start) provision, new cabin for Cylch Meithrin Llanarth (Flying Start capital), extension to Cylch Meithrin Llanilar, improvements to the cabin for Cylch Meithrin Rhydypennau and Penllwyn. With work expected to start soon on the 3-11 school Ysgol Dyffryn Aeron which will also include wrap around provision for the Cylch Meithrin. This is expected to open by September 2023.

Grant funding has also been made available through the Welsh Government **Childcare Offer Small Grants** scheme for providers and childminders to improve the physical environment inside or outside of their setting. Coupled with additional COVID-19 funding a total of £502,000 has been made available since 2019.

### **School Day Reform**

The WG commitment between Plaid Cymru and the Labour Government are committed to exploring the reform of the school day and school year dates in order to support the learner and staff wellbeing, tackle educational inequalities and bring those more in line with patterns of family life and employment. It is unclear yet what this will mean to Childcare provision and what impact it will have. However, we will need to consider the implications on this as part of our five year plan.

## **20 CROSS BORDER**

Since 2018 Ceredigion County Council Childcare Unit has become the delivery authority for the Childcare Offer in West Wales, and works closely with the engagement authorities of Carmarthenshire, Pembrokeshire and Powys. As a result, a close working relationship has developed with counterpart officers within these Authorities. This has been especially important when working with Childcare providers on the county boundaries where cross border issues are identified and addressed by the officers.

Due to the COVID-19 pandemic, all Local Authorities and Welsh Government Childcare, Play and Early Years Division have been meeting on a more regular basis, which has added real value to the work. Welsh Government agreed to lead on the Parent/Carer Survey.

Not only do we work with neighbouring Authorities on the Childcare Offer, but we also support each other with regards to other issues around Childcare. Examples of this include investigating the possibility of commissioning an external company to carry out the CSA, sharing good practice regarding ALN, Childcare Offer Capital Grant applications etc.

We are aware from our Parent/Carer survey response that some parents use a Day Nursery in Newcastle Emlyn, Carmarthenshire which borders Ceredigion. The same is also true for accessing childminders and Sessional Care settings in North Carmarthenshire, North Pembrokeshire as three large towns are located on the River Teifi which is on the county boundary. It is inevitable that services users from both sides of the river access Childcare settings on either side of the river. A relatively low number of parents from north Ceredigion are known to access Childcare in the Machynlleth area, Powys due to work commitments.

## 21 WORKFORCE DEVELOPMENT AND TRAINING

### STAFF RECRUITMENT AND RETENTION

Staff recruitment and retention has been highlighted as a real concern by the sector during the last 18 months with providers reporting difficulties in recruiting qualified staff and particularly Welsh speaking staff. The Childcare Unit have raised the concerns with WG.

This risk is increasing and is associated with rates of pay and status of qualifications, as well as staff morale. Childcare sector staff were not rewarded when the care sector staff received national bonus payments, despite also remaining open and working throughout lockdown periods to enable parents to work. They have not received the same status and protection as school staff, and this has resulted in many Childcare qualified staff leaving the sector.

The local FE colleges are reporting a lower number of students studying Childcare and the secondary schools in Ceredigion no longer offer level 2 or 3 Childcare qualifications.

**ACTION: Further investigation is needed to identify what Childcare and Play training opportunities are available in Ceredigion. More work is needed locally to promote a career working in Childcare.**

However, until more is done to increase the pay within the sector, we are unlikely to see an improvement for some time.

#### Provider Quote

*“It can be a challenge to maintain 50% qualified staff ratios, this will probably increase as the Playwork qualification is introduced as well.”*

## **STAFFING LEVELS, TURNOVER AND VACANCIES**

**Table 21.1: Staffing levels, turnover, vacancies, by provider type**

<b>Running your Service - Your Staff who work at your service</b>	<b>No. of settings</b>	<b>No of individual staff currently work in the service</b>	<b>No of staff working less than 16 hrs per week</b>	<b>No of staff that have left the service in last 12 months</b>	<b>No of Childcare or play posts currently vacant</b>	<b>No of Childcare or play hours per week these vacancies equate to</b>	<b>No of staff currently employed on zero hour contracts</b>	<b>Do you have difficulty in offering your staff 16 hour or more contracts? YES</b>	<b>Do you undertake Workforce Planning? YES</b>	<b>If you undertake Workforce Planning, how many additional staff do you envisage needing in the next 24 months?</b>
Sessional Day Care	8	32	14	7	5	181	5	4	3	3
Sessional Full Day Care	21	115	36	15	3	113	24	5	18	16
Full Day Care Nursery	6	111	4	15	15	126	22	1	4	10
Childminder	45	37	7	1	0	0	4	3	4	0
Out of School Care	9	40	20	0	0	10	22	2	4	6
Crèche and Holiday Playscheme	1	5	5	4	0	0	0	1	1	0
Crèche	1	5	1	3	0	0	0	0	0	0
<b>TOTAL</b>	<b>91</b>	<b>345</b>	<b>87</b>	<b>45</b>	<b>23</b>	<b>430</b>	<b>77</b>	<b>16</b>	<b>34</b>	<b>35</b>



- Based on the results of the SASS, 345 people were identified as working in Childcare within Ceredigion. Although 45 childminders completed the SASS only 37 are represented here.
- A total of 45 staff are reported to have left a post within the last 12 months. However, no information is collected to track where these have gone to. Settings have reported that some have gone to work in schools whilst others have left the sector completely.
- 23 Posts are reported as being vacant. This is a concern within the current staffing crisis within Childcare, and the ability to recruit and fill posts.
- 16 Providers reported that they found it difficult to offer staff more than 16 hours per week, this was spread across the provider types.
- Providers highlighted that 35 additional staff will be needed over the next 12 months.

**Table 21.2: Staff turnover**

Staff turnover by type %	No of individual staff currently work in the service	No of staff that have left the service in last 12 months	% staff turnover
Sessional Day Care	32	7	22
Sessional Full Day Care	115	15	13
Full Day Care Nursery	111	15	14
Childminder	37	1	3
Out of School Care	40	0	0
Crèche and Holiday Playscheme	5	4	80
Crèche	5	3	60
<b>Total</b>	<b>345</b>	<b>45</b>	<b>13</b>
<b>Sessional Care combined</b>	<b>147</b>	<b>22</b>	<b>15</b>

When asked in the provider consultation if staff qualifications are an issue? Respondents noted:

*“It can be a challenge to maintain 50% qualified staff ratios, this will probably increase as the Playwork qualification is introduced as well.”*

*“Short contracts and low hours not enticing good quality staff to the job as well as very low pay compared to other work in the area requiring less qualifications and responsibility”*

*“Yes. The number studying Childcare courses at college has decreased substantially. Secondary school in the area are no longer offering the course.”*

*“As a Welsh language nursery, we also need fluent Welsh speakers. Therefore, the availability of Welsh speaking qualified workers is even more of an issue.”*

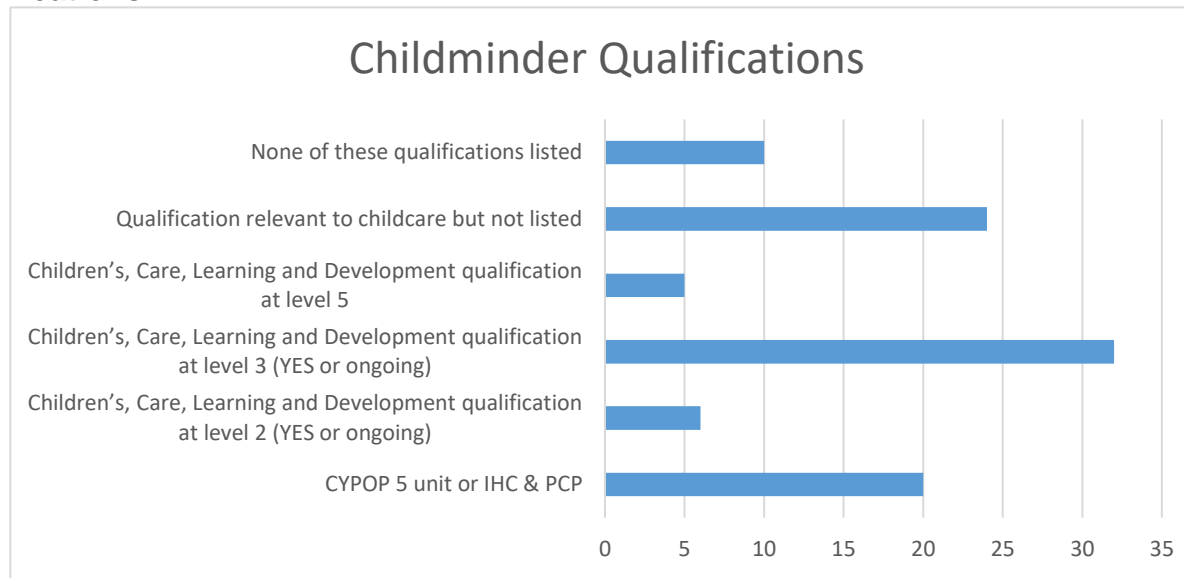
### **TRAINING AND QUALIFICATIONS**

87% of staff working in Childcare have a Childcare Qualification; and just under 58% of play practitioners have a play qualification.

**Table 21.3: Childminder Qualifications:**

<b>Running your Service - Your Qualifications (Child Minders only)</b>		<b>CYPOP 5 unit or IHC &amp; PCP</b>	<b>Children’s, Care, Learning and Development qualification at level 2 (YES or ongoing)</b>	<b>Children’s, Care, Learning and Development qualification at level 3 (YES or ongoing)</b>	<b>Children’s, Care, Learning and Development qualification at level 5</b>	<b>Qualification relevant to Childcare but not listed</b>	<b>None of these qualifications listed</b>
Childminder	45	20	6	32	5	24	10

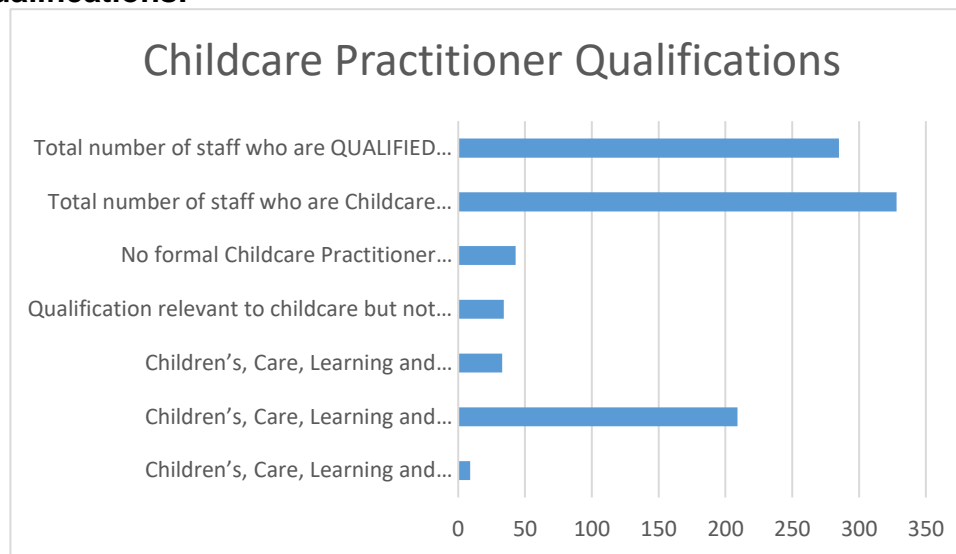
**Figure 21.1: Childminder Qualifications:**



**Table 21.4: Childcare Practitioner Qualifications:**

Children's, Care, Learning and Development qualification at level 2	Children's, Care, Learning and Development qualification at level 3	Children's, Care, Learning and Development qualification at level 5	Qualification relevant to Childcare but not listed	No formal Childcare Practitioner qualifications	Total number of staff who are Childcare Practitioners	Total number of staff who are QUALIFIED Childcare practitioners
9	209	33	34	43	328	285

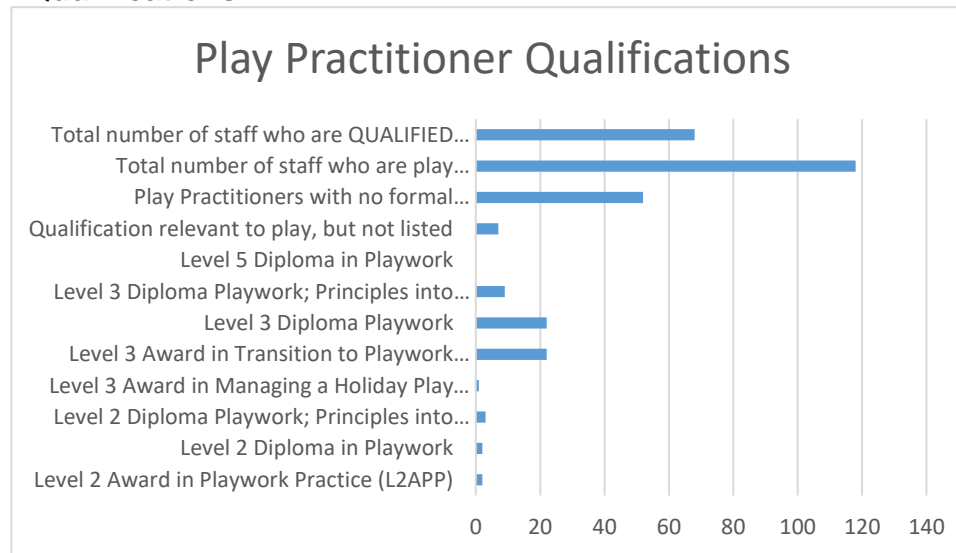
**Figure 21.2: Childcare Practitioner Qualifications:**



**Table 21.5: Play Practitioner Qualifications**

Level 2 Award in Playwork Practice (L2APP)	Level 2 Diploma in Playwork	Level 2 Diploma Playwork; Principles into Practice (P3) - comprises award, certificate and diploma	Level 3 Award in Managing a Holiday Play Scheme	Level 3 Award in Transition to Playwork from Early Years	Level 3 Diploma Playwork	Level 3 Diploma Playwork; Principles into Practice. (P3) – comprises award, certificate and diploma	Level 5 Diploma in Playwork	Qualification relevant to play, but not listed	Play Practitioners with no formal qualifications	Total number of staff who are play practitioners	Total number of staff who are QUALIFIED play practitioners
2	2	3	1	22	22	9	0	7	52	118	68

**Figure 21.3: Play Practitioner Qualifications**



We remain to see a high turnover of staff within the Childcare sector which highlights the importance of ensuring we have an effective training programme in place. As a Local Authority, the Childcare Unit ensure training is available for the mandatory courses (Paediatric First Aid, safeguarding and food hygiene) as well as any Continuous Professional Development (CPD) opportunities. The pandemic has made it difficult to ensure the continuation of training as courses have had to be adapted to be delivered on-line. Paediatric First Aid has been the most challenging as face-to-face training remains a requirement, therefore a hybrid course is currently delivered with day 1 as an on-line course and day 2 remains to be face to face with additional safety measures and reduced attendance to comply with Covid-19 restrictions.

Additional funding is currently available through the Education Improvement Grant – Regional Consortia School Improvement Grant (RCSIG) which has provided an opportunity to offer an extensive training programme to Childcare providers who are not educational settings and to Childminders. Training available will include Jabadao, Wellcomm, Additional Learning Needs awareness etc.

**CWLWM Support**

All CWLWM partners have been able to offer providers with free membership within their organisation for 2021-2022, this was made available through WG funding. However, Ceredigion have supported Childminders with funded membership and insurance for the last five years.

CWLWM have also been able to offer a variety of training sessions, CPCKC have been able to offer training in 'Transition into Playwork' and Pacey Cymru are able to provide the childminding course at a reduced rate until the end of March. All this support is gratefully received by the sector although it can lead to confusion for providers as to who does what.

In December 2021 CWLWM partners undertook their own Playwork and Early Years survey on recruitment, pay and job vacancies. The results will feed into their action plans for the coming year.

**ACTION: Ensure CWLWM take note of CSA findings and work with LAs to support the sector.**

## WELSH LANGUAGE TRAINING

The **Camau - Learn Welsh Scheme for Early Years Education and Childcare** is a free course tailored for Childcare practitioners and open to all under the Welsh Government Work Welsh scheme. Camau | Learn Welsh Since Covid this is now offered as an Online Self Study course at Entry level (suitable for beginners, and those who have completed the Taster Courses).

Pre pandemic - by March 2020 – 12 had registered online with just 9 attending weekly sessions hosted by a setting in north Ceredigion. Post pandemic – the scheme is working with the CWLWM partners to promote the course, and the partners hold the information on learners per sector.

**Table 21.6: Camau - Learn Welsh Scheme for Early Years Education and Childcare**

Date	Type of setting	Course	Number of staff attended
March 2020	Playgroup	Face to face weekly session - North Ceredigion	6
	Day Nursery	Face to face weekly session - North Ceredigion	1
	Cylch Meithrin	Face to face weekly session - North Ceredigion	1
	Childminder	Face to face weekly session - North Ceredigion	1
December 2021	Out of School Care	Online – Mynediad / Entry level 1	3
	Childminders	Mynediad / Entry level 1	2

## 22 WELSH IN EDUCATION STRATEGIC PLAN (WESP)

The Welsh Government's Cymraeg 2050 strategy was published in 2017, with one of the overarching ambitious targets is to reach one million Welsh speakers by 2050. The strategy supports the promotion and facilitation of the use of the Welsh language. Under this strategy all LAs are required by law to have a Welsh in Education Strategic Plan (WESP) available. It is required to plan according to 7 statutory outcomes to develop and strengthen the position of the Welsh language within education.

*By September 2032, Ceredigion County Council's aspiration is that all pupils in the authority's schools will attend Welsh-medium immersion education until the age of seven. Having an excellent foundation in speaking and communicating in Welsh will increase the pupil's choice and confidence to follow a fully bilingual path throughout the rest of his or her educational career and in facing the future world of work and social life. Not only will this benefit the individual and the position of the Welsh language in Ceredigion as a community language, it will also contribute very positively to Wales' national well-being goals and to the Welsh Government's aim of increasing the number of Welsh speakers to one million by 2050.*

### **Outcome 1: More nursery children/three-year-olds receive their education through the medium of Welsh.**

Towards the end of this strategic plan, the percentage of 3-year-olds in Welsh Medium provision is therefore required to increase. Only through the development of further Welsh Medium nursery classes is this possible

The WESP stated "in September 2020, 72.9% of Year 1 pupils in Ceredigion schools were receiving Welsh medium education. By 2032, Ceredigion County Council's aspiration, through full consultation with stakeholders, is that the target of 87% suggested by Welsh Government be further exceeded to 100%".

In Ceredigion 73% of all Childcare settings are Welsh or provide Welsh service and overall only 17% of staff spoke little or no Welsh.

87.5% of the primary schools are Welsh medium.

As explained in Supply of Childcare section - CIW have changed categorisation of Welsh Language.

93% of Sessional Care settings are Welsh medium – see table below for full figures.

**Table 22.1: Main language of settings:**

Main Language/s through which your service is provided Other languages used in the provision of the service	Welsh / Both %	English %
Sessional Day /Full Day Care	93	7
Full Day Care Nursery	83	17
Childminder	51	49
Out of School Care, Holiday Playscheme & Crèche	100	0
<b>TOTAL</b>	<b>73</b>	<b>27</b>

**Table 22.2: Number of children receiving Foundation Phase Nursery Education Autumn 2021:**

No. of children receiving Foundation Phase Nursery Education Autumn 2021	Boys	Girls	TOTAL number of children
Maintained settings (14 schools)	164	199	363
Non-maintained settings (21 Childcare settings)	103	98	202
<b>TOTAL</b>			<b>565</b>

Aberystwyth and Cei Newydd are now the only places where it is possible to create growth in the number of 3-year-olds receiving immersion education. Through consultation and collaboration with headteachers, governing bodies and all stakeholders of Ysgol Cei Newydd, Ysgol Plascrug, Ysgol Padarn Sant, Ysgol Llwyn yr Eos and Ysgol Comins Coch, see the development of the current system for it to offer a wider linguistic choice to all children in these schools.

**The proposal that went out for consultation through the WESP was to:**

- Establish a new 3 year old Welsh medium nursery class at Ysgol Comins Coch, Ysgol Padarn Sant and Ysgol Cei Newydd
- Develop the existing nursery provision at Ysgol Plascrug and Llwyn yr Eos into Welsh medium

**What could this mean for the non-maintained sector?**

- All children who transfer to nursery/reception provision and then the statutory period in Ceredigion schools from the non-maintained and care sector will follow a continuum of linguistic immersion through the medium of Welsh until the age of seven
- It would have specific implications for the current settings in Comins Coch, St Padarn's and Cei Newydd as they would not then provide education for 3-year-olds



At the end of the 10-year plan - Without exception, all children in Ceredigion will be provided with full access to Welsh-medium education from the early years (aged 3) to aged 7, building on that choice as they move on to the next stages of their education and social life, aged 11 and beyond.

Mudiad Meithrin believes that “Building Welsh medium Childcare capacity is integral to delivering greater numbers of Welsh speakers and achieving the targets in Cymraeg 2050. Welsh medium Childcare provides a bridge to Welsh medium education and currently almost 90% who go to a Cylch move on to receive their education through the medium of “Welsh”.

The WESP also highlighted the following targets which relate to Childcare. However, due to the timing of the WESP and the CSA, these findings are mainly based on the 2017-2022 CSA.

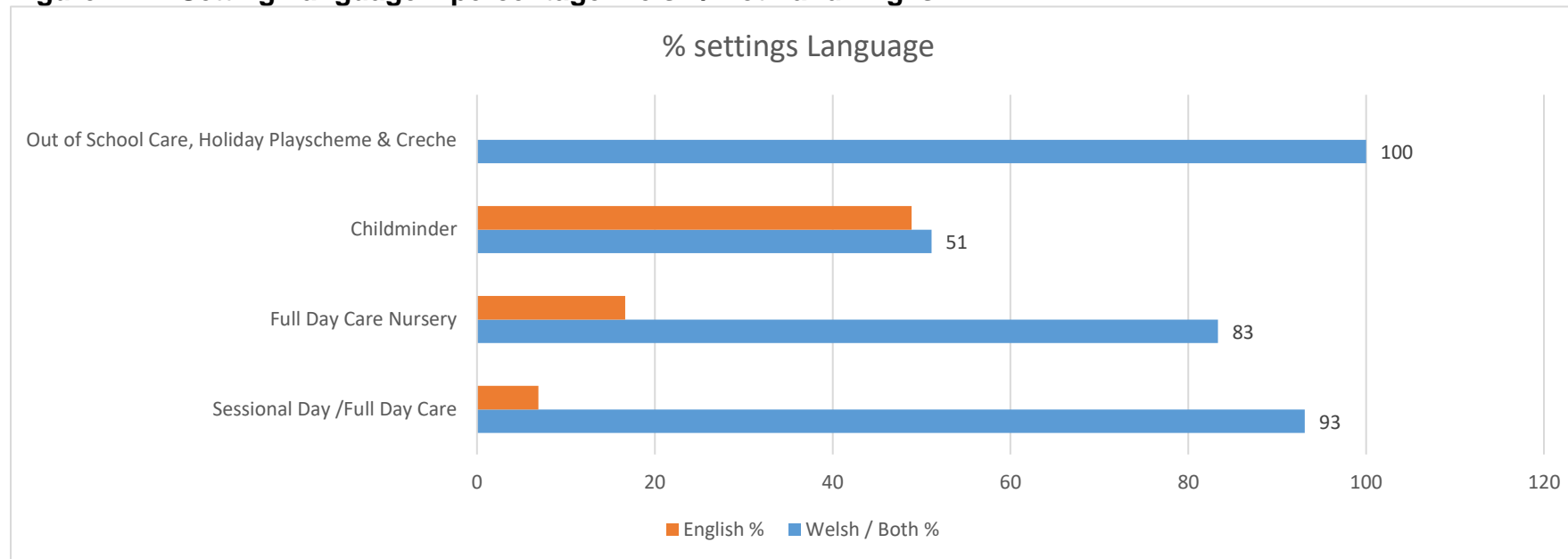
**Some other relevant actions set out in the 2022/32 WESP**

- Prepare an annual campaign to encourage more Welsh speaking child minders (from September 2022 onwards)
- Expansion of Welsh medium provision in all Childcare provision in the Aberystwyth area (including childminders, Day Nurseries, Sessional Care and After School/Holiday Clubs (wrap around care)
- Ensure close partnership with secondary schools and further education colleges in Ceredigion and ‘Mudiad Meithrin’ schemes/apprenticeships to have a sufficient Welsh medium workforce in the Childcare sector (September 2022 onwards).
- Childcare Unit - through a Childcare Sufficiency Assessment to identify and plan measures to strengthen and expand Welsh medium Childcare provision in the area to ensure a seamless pathway towards Welsh medium education. This will ensure that Family Information Services for parents/ carers and prospective parents/carers provide information on the advantages of raising children bilingually and using Welsh at home on the DEWIS Cymru and FIS website.

These actions may need amending slightly going forward as a result of the findings from this CSA.

Analysis of providers Welsh language delivery can be found in Section 9.1

**Figure 22.1: Setting Language – percentage Welsh / Both and English:**



**Table 22.3: Breakdown of settings by main language:**

Non-maintained settings total sessional:		Settings not providing education:		Childminders:	
Welsh	83%	Welsh	86%	Welsh	16%
Welsh & English	10%	Welsh & English	7%	Welsh & English	36%
English	7%	English	7%	English	49%
Other	0%			Other	0%

**ACTION: Support the sector with Welsh language training. The difficulties in recruiting qualified Childcare and play workforce is a challenge for the sector, and we must ensure Welsh language levels are supported.**

**ACTION: Ensure all settings are working towards the Care Inspectorate Wales' Welsh Language Active Offer.**

**23 COVID-19 PANDEMIC**

The impact Covid has had on the Childcare sector is reported on throughout this report. Childcare remained a critical service throughout the pandemic as families still required Childcare to work.

The first lockdown the majority of providers in Ceredigion closed their services. The messages for everybody to stay at home simply did not make it sustainable for providers to remain open. Settings which operate from within a school were forced to close. However, working from home was not at option for all families and some required Childcare to enable them to work. We were fortunate that 11 childminders remained open throughout and continued to provide a service for key worker families.

All Mudiad Meithrin settings had closed, However, Flying Start commission Mudiad Meithrin to run three Childcare settings in Ceredigion. Due to the lack of Childcare available, the Childcare Unit worked with Flying Start and Mudiad Meithrin to reopen two of the Flying Start settings as Emergency Childcare hubs for children under 4 which were funded by the WG Coronavirus Childcare Assistance Scheme (C-CAS). We had to find alternative staff to work in the hubs as the regular staff were reluctant or unable to work in the early stages of the pandemic. Staffing Rotas were arranged to ensure sufficient staff were available to meet the child ratios within the hubs. Within a few weeks the regular staff of the settings returned to work.

Childcare providers have been kept informed of all changes to guidance and the Coronavirus Job Retention Scheme (CJRS Furlough) etc. throughout the pandemic and a variety of funding support streams have been made available through Government schemes and through WG funding via the LA.

As the lockdown was lifted it was encouraging to see the Childcare sector start to reopen and begin to work towards the 'new normal'. The last two years has not been easy for them but, it is important that the sector are given the appreciation they deserve for keeping things going.

**Table 23.1: Number of closures reported in the SASS:**

Temporary Closures	Did your service temporarily close at any time due to COVID-19?	Number of times Temporarily closed up until SASS date
Sessional Day Care	8	3 closed once; 3 closed twice ; 2 closed 3 times
Sessional Full Day Care	20	8 closed once; 8 closed twice; 4 closed 3 times
Full Day Care Nursery	6	1 DN closed 3 times; 4 DN closed once; 1 unknown
Childminder	24	
Out of School Care	6	
crèche and Holiday Playscheme	1	
Crèche	-	
<b>TOTAL</b>	<b>65</b>	

**ACTION: Continue to monitor the impact of COVID-19 on pre-school children, children and staff in Childcare settings**

Consideration to be given to [Delphi Study on the impact of COVID-19 on children under age 5 | GOV.WALES](https://www.gov.wales/government/consultations/delphi-study-on-the-impact-of-covid-19-on-children-under-age-5) and the impact on Early Childhood Education and Care (ECEC) <https://www.childreninwales.org.uk/news/ECECKeyfindings/>

Stakeholders provided the following comments in regards to the impact of Covid-19 on Childcare provision:

*Pre-school Childcare providers and childminders seem to be surviving the pandemic fairly well but the out of school sector/holiday playschemes for 4-11 year olds, which has always struggled, has been hit very badly. I think people are now making their own arrangements even more and children are losing out on the opportunity to socialise and play after school with their peers.*

*Yes “The committee do not want to increase fees as they are a charity and they do not find it fair on the parents that do use the club but they are just about covering costs due to the decrease in the number of children attending.”*

*Since the pandemic, no-one is applying for jobs in the sector whether part-time or full-time, school term or year-round. The sector does not attract new workers but is losing many to jobs that offer better working conditions eg allowing work from home, working flexi, paying better wages or being able to go on holiday during term time when it's cheaper.*

## 24 GAP ANALYSIS AND AREAS FOR IMPROVEMENT

**Having analysed the supply of Childcare provision in Ceredigion and compared it with the demand for Childcare we can see that we have an insufficiency of Childcare places available to meet parents demand.** There are pockets of areas where families are reporting difficulties in finding certain types of Childcare, in particular after school, holiday provision and full-day care provision. Since the last assessment 2017 – 2022 we have seen a loss of 375 Childcare places across all Childcare types. Accessible high quality and affordable Childcare is essential for families as it enables parents to access education / training or employment opportunities which contributes to the economy of Ceredigion as it enables parents to be economically active.

The table below show the number of registered places per 1,000 population all ages, and per 1000 population of 0-12 year olds per MSOA. This table shows that Aberaeron & Llanrhystud area and Aberystwyth North have the highest percentage of 0-12 year olds according to ONS Mid-Year Population Estimates, 2020. 20% of all children attend a registered Childcare setting.

**Table 24.1: Population and Registered places per 1,000 population per MSOA:**

MSOA Name	All Ages	Number of registered places	No of registered places per 1,000 population	% of population	Population Aged 0-12	No of registered places per 1,000 population aged 0-12	% of 0-12 population
Borth & Bont-goch	7,466	199	26.7	2.7	973	204.5	20.5
Aberystwyth North	9,001	120	13.3	1.3	479	250.5	25.1
Aberystwyth South	6,629	215	32.4	3.2	932	230.7	23.1
Aberaeron & Llanrhystud	7,113	198	27.8	2.8	776	255.2	25.5
New Quay & Penbryn	6,579	117	17.8	1.8	740	158.1	15.8

Lampeter & Llanfihangel Ystrad	8,191	180	22	2.2	1170	153.8	15.4
Cardigan & Aberporth	8,873	201	22.7	2.3	1174	171.2	17.1
Beulah, Troed-yr-aur & Llandysul	7,420	157	21.2	2.1	887	177	17.7
Rheidol, Ystwyth & Caron	11,623	183	15.7	1.6	1481	123.6	12.4
<i>Source: ONS Mid-Year Population Estimates, 2020.</i>	<b>72,895</b>	<b>1570</b>	<b>21.5</b>	<b>2.2</b>	<b>8612</b>	<b>182.3</b>	<b>18.2</b>

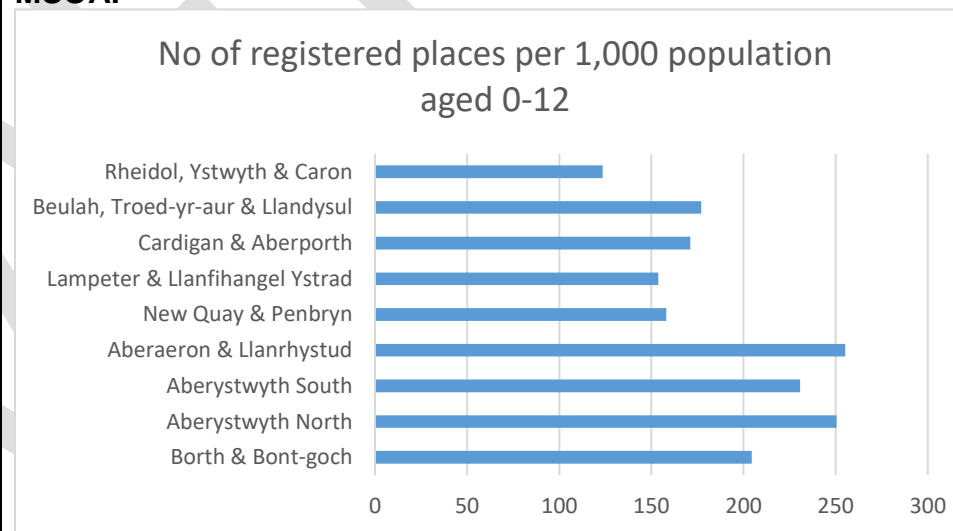
**Table 24.2: Places per 1000 populations aged 0-12 – per MSOA:**

MSOA Name	No of registered places per 1,000 population aged 0-12
Borth & Bont-goch	204.5
Aberystwyth North	250.5
Aberystwyth South	230.7
Aberaeron & Llanrhystud	255.2
New Quay & Penbryn	158.1
Lampeter & Llanfihangel Ystrad	153.8
Cardigan & Aberporth	171.2
Beulah, Troed-yr-aur & Llandysul	177
Rheidol, Ystwyth & Caron	123.6
<i>Source: ONS Mid-Year Population Estimates, 2020.</i>	<b>182.3</b>

**Table 24.3: Places per % of 0-12 population – per MSOA:**

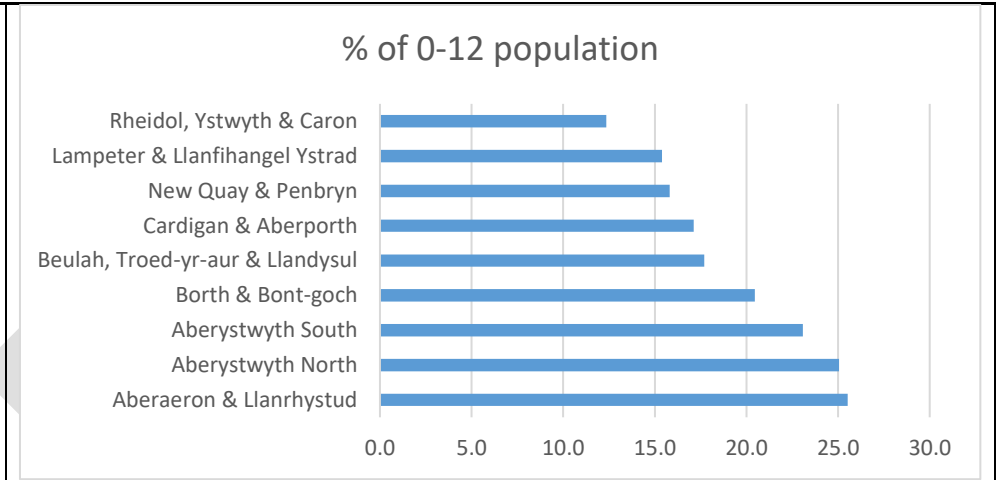
MSOA Name	% of 0-12 population
Aberaeron & Llanrhystud	25.5
Aberystwyth North	25.1
Aberystwyth South	23.1

**Figure 24.1: Places per 1000 populations aged 0-12 – per MSOA:**



**Figure 24.2: Places per % of 0-12 population – per MSOA:**

Borth & Bont-goch	20.5
Beulah, Troed-yr-aur & Llandysul	17.7
Cardigan & Aberporth	17.1
New Quay & Penbryn	15.8
Lampeter & Llanfihangel Ystrad	15.4
Rheidol, Ystwyth & Caron	12.4
<i>Source: ONS Mid-Year Population Estimates, 2020.</i>	18.2



- The assessment has identified that there will be a demand for more Childcare provision in all 9 of the MSOA areas.
- The Parent/Carer survey suggested the Rheidol, Ystwyth and Caron as an area in need of more provision. However, the Aberaeron and Llanrhystud area shows the highest percentage of children aged 0-12, and Childcare providers in this area have identified the need for more provision in this area.
- Caution must be used here as the Rheidol, Ystwyth and Caron MSOA is by far the largest area in the county, and travelling time must also be considered. Therefore, more localised analysis will be needed in these areas to identify where exactly the provision is required.
- Breakfast Club and After School Provision are the care requirements that will be in most demand in the next couple of years, and highlights that the 'wrap around' care in schools is the main concern for parents and carers.
- We still see a high reliance upon using family and friends to provide Childcare across the county. The reason for this is affordability – wages remain below the national average in Ceredigion which impacts the ability to afford Childcare; or availability of Childcare. If the provision isn't available or no spaces are available, families are reverting to relying on family and friends.
- Private providers (Day Nurseries and Childminders) are struggling to cover costs, but know that if they increased their daily fees, parents would not be able to afford to place their children in day care. Many parents require part time care – which is difficult for settings to fill e.g. more afternoon vacancies within the settings. Funding for the Childcare Offer and Early Education needs to be reviewed in line with increased overheads.

- Childcare sector professionals are committed to providing a high quality service to the children in their care. They are a dedicated workforce who continually strive to improve their own skills, with most only being paid the National Minimum/Living Wage. The pandemic has shown that providers are resourceful, adapt to change and now working in a 'new normal'. However, qualified professionals, who are faced with moving goalposts (increased qualification requirements etc.), are looking elsewhere for employment in other sectors in order to be valued and appropriately paid for their skills. Staff morale is low since the pandemic started. They remained open to enable key workers to work – but were not acknowledged or rewarded like the health and care sector.
- Providers are reporting that they are finding it difficult to recruit staff with the appropriate qualifications and who are able to converse in the medium of Welsh in order to be able to work in a Childcare setting. Expectations on staff are equal to what is required from schools – but rate of pay, status and recognition are not equal. The level of staff vacancies and recruitment challenges are indicators of the health of the sector. Staff in Sessional and Full-day care settings who provide early education should be rewarded and acknowledged in the same way as those in school settings. In addition to the same Estyn requirements and inspections, they also have unannounced CIW inspections that schools do not have to consider.
- Any future re-organisation proposals that draw 3 year old education into schools may have an impact on childcare providers. Appropriate actions will need to be considered to mitigate any decline in childcare places which will mean we are not securing sufficient childcare as is our statutory duty.
- WG and LAs have a statutory duty to ensure sufficient Childcare to enable parents and carers to work or attend training, therefore a new way of working needs to be considered. An overhaul of the current model is required to ensure that more qualified professionals are not lost from the workforce. The Childcare sector can, and have adapted to change as proven in recent years. Voluntary run committees are not a sustainable model if Childcare is to be run as a business model. Volunteer Committees are facing increasing challenges and expectations, but in reality their workload has increased in recent years.
- WG are making changes to the curriculum which are influenced by models of effective early years curricula from other countries. However, there is little evidence of such models being adopted in regard to funding, management structure and committee models for early years Childcare providers in Wales.
- Many Sessional Day Care providers have operated under the 'Cylch Meithrin' model for many years (Mudiad Meithrin recently celebrated their 50 Years anniversary). However, demands driven by registration regulations under CIW during the last 20 years and Estyn requirements for those delivering 3-year olds education have increased significantly over this period and there is a need to consider if the model is fit for purpose.



**Table 24.4: School model: Sessional Care model:**

School Model	Current Sessional Care Model
<ul style="list-style-type: none"> <li>Local Authority (LA) pay and manage staff</li> <li>LA Advisory teachers support early years teachers</li> <li>LA cover overheads of premises</li> <li>Volunteer committee (Parent Teacher Association PTA) fundraising for additional income for extra play equipment etc.</li> </ul>	<ul style="list-style-type: none"> <li>Volunteer committee pay and manage staff, however staff often have to arrange fundraising events to cover costs.</li> <li>Support provided by Childcare Unit, Umbrella bodies &amp; LA Advisory teachers</li> <li>Grants offered to support sustainability, and overhead costs of premises</li> <li>Volunteer committees responsible for all management, administration and fundraising</li> </ul>

- Unregistered activity clubs for Children are driving registered Childcare out of the market. CIW need to revisit the exemptions list as part of the review of the National Minimum Standards in 2022.
- The CSA Action plan will need to take account of WG initiatives that will have an impact on Childcare providers that are yet to be confirmed e.g. funded Childcare for 2-year olds and School Day Reform and ensure that Childcare providers are engaged with the consultation process

**National issues – beyond control of Welsh Government and Local Authorities**

- Parents need better Tax Free Childcare / financial support to use to pay for Childcare which is managed by HMRC and not under WG control. More needs to be nationally to promote all financial support for parents. The Child Tax Credit scheme number of claimants have decreased in Ceredigion in recent years and needs to be investigated.
- Childcare Staff are unable to work more than 16 hours or risk losing their own Working Tax Credit and associated benefits. Most are on National Minimum Wage, and working more hours does not make them ‘better off’. This is a challenge for the employers in the sector. The whole benefit system does not allow the flexibility to work more.

As outlined in the Local Well-Being Needs Assessment in Section 5 the socio-economic factors must be considered along with gaps identified below.

	<p><b>Childcare provision for children of parents who work atypical hours</b></p> <p><b>Stakeholder comment</b></p> <ul style="list-style-type: none"> <li>• <i>“There is a need for Childcare out of normal working hours but possibly not enough need to make this type of provision financially sustainable. There is a dire need for more Childcare during school holidays, particularly in Aberystwyth and Cardigan which have both recently lost after school club and holiday playscheme provision. We also need more Childcare for children with disabilities as families with disabled children don't seem to feel that they can use mainstream Childcare providers.”</i></li> <li>• Demand identified for provider to offer longer hours of service e.g. from 8am - 6pm.</li> </ul>
	<p><b>Welsh medium Childcare provision</b></p> <ul style="list-style-type: none"> <li>• We have a high level of Welsh medium Childcare available across all Childcare types. However, there is a demand for more Welsh speaking Childminders across the county.</li> </ul>
	<p><b>Childcare provision for different language categories</b></p> <p>With regard to language, the Welsh medium provision is high. However, Childcare provision must be available for all families. Aberystwyth in particular welcomes a large number of families for very short periods within the University employee and student population and Hospital employees for example. Provision is needed for families who have neither Welsh nor English as a first language including the refugee families that Ceredigion County Council have welcomed in the last few years under the re-settlement scheme.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Parent’s Survey comments:</b>  <i>“There must be at least one bilingual setting because of our many overseas children that come to Aberystwyth because parents start to work here.”</i></p> <p><i>“Yes a bilingual or English speaking setting must be available for these children and English/welsh classes made available to the parents.”</i></p> </div>
	<p><b>Types of Childcare available</b></p>

- *“The quality of provision is good where it is available, but overall, there is just not enough! Working families are especially affected as there are no after-school clubs, no holiday provision and limited numbers of childminders. It is also too expensive for working families on low incomes to have to pay for a childminder space as they would mostly have to pay for a half-day, and that is dependent on finding a childminder with spaces! There is also very few nurseries in the County, with some areas having none.”*
- *“South Ceredigion and rural Ceredigion seem to be lacking in Childcare provision, especially in the Llanarth area down to Cardigan area. Childcare providers or childminders that provide school pick up are also an issue.”*
- One prospective private provider tried to address the gap in 2021 but due to planning permission along the river Teifi being temporarily suspended, this application is on hold. If no decision is made soon this potential business owner could decide to not proceed with the development.

**ACTION: Request that Economy & Regeneration Services e.g. planning and property services consider Childcare setting applications as a matter of urgency.**

- *“PACEY Cymru are concerned to note a general decline in the number of childminders across Wales, and have been reporting on this for the last five years. In Ceredigion we understand there to have been four de-registrations in the six months between April 2021 and September 2021. We are also concerned about the low number of new registrations across Wales, in Ceredigion there has been one new registrations during the same period”.*
- The Out of school sector has become very fragile. The model of committee run clubs is not sustainable. Three clubs have deregistered during the last 18 months with another club currently closed looking for somebody to take over the running of the club. Work is underway to try and reopen two of the closed clubs through a new model.
- Additional funding required to support Children with additional learning needs e.g. Cynllun Cyfeirio hours are not sufficient to support all children.

#### **Age of children for whom Childcare is available**

- *“Attending high quality Childcare can improve outcomes for children. Our State of the Sector Report with 2050 parental responses across Wales also tells us that children learn new skills (59%), have better social skills (78%) participate in new activities (61%) and children are happier (43%).” (CPCKC)*

	<ul style="list-style-type: none"> <li>• <i>“There still is a need for registered Childcare for school age children. We estimate for example that there are still 23 Welsh medium Primary Schools without access to Out of School Care. To support the WG Cymraeg 2050 goal this is an area that needs growth. Having registered Childcare based on school site can be a factor in parental choice of school - Wrap around provision needs to be available in every area school.”</i></li> </ul>
	<p><b>Affordability of Childcare</b></p> <ul style="list-style-type: none"> <li>• <i>In terms of affordability there is no fee consistency, some locations charge "top ups" while others keep the price low. The "top ups" are unfair on low paid / unpaid parents so children do not attend full time / regularly, this affects their development.</i></li> <li>• <i>Need to ensure that Childcare places that are funded are at a level that ensures sustainability.</i></li> </ul>
	<p><b>Times at which Childcare is available</b></p> <ul style="list-style-type: none"> <li>• Demand identified for provider to offer longer hours of service e.g. from 8am - 6pm.</li> </ul>
	<p><b>Location of Childcare</b></p> <ul style="list-style-type: none"> <li>• <i>Location is a major factor (See Transport chapter) due to the rurality of the county, and lack of certain types of Childcare in some areas for children under age of 2 in particular where there are waiting lists. We are aware of parents who use Childcare requiring travelling in the opposite direction to work, or making a long round trip to a Day Nursery and then back to work location. Provision for 3-4 years olds during term time is plentiful, but there are gaps for holiday provision in all age groups.</i></li> <li>• <i>In Lampeter, there is no funded pre-school provision. There is a need to develop provision to prepare for 2-year old funding. However, caution must be taken not to negatively impact on the sustainability of the two Day Nurseries and Childminders in that area, by developing a system where funded service is available in the Day Nursery settings for working parents, and alternative provision for families who wish to take up sessional care only.</i></li> <li>• <i>“It is also a plus when Childcare is provided in the more rural areas as it can be more convenient at times to parents and can help reduce costs of taking children to their nearest town.”</i></li> </ul>

- “South Ceredigion and rural Ceredigion seem to be lacking in Childcare provision, especially in the Llanarth area down to Cardigan area. Childcare providers or childminders that provide school pick up are also an issue.”

## **ACTION PLAN**

The Action Plan will be developed following any recommendations, and approval by the *Learning Communities Overview and Scrutiny Committee* prior to opening for public consultation.

The Early Years, Childcare And Play Strategy Group members will develop actions based on the Findings and Themes identified, with responsibilities, priorities and timescales identified.

DRAFT

**ANNEXES**

**ANNEX 1 FLYING START PROVISION**

**Parent Survey (October 2021) responses:**

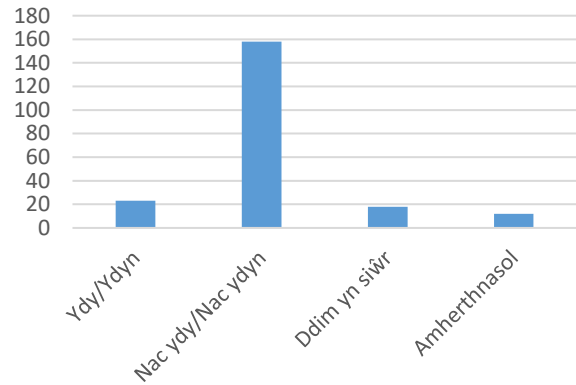
From 633 responses – 211 indicated a child aged 2-3, and responded to the question regarding Flying Start

**C9. A yw eich plentyn/plant 2 neu 3 oed yn manteisio ar ofal plant Dechrau'n Deg?**

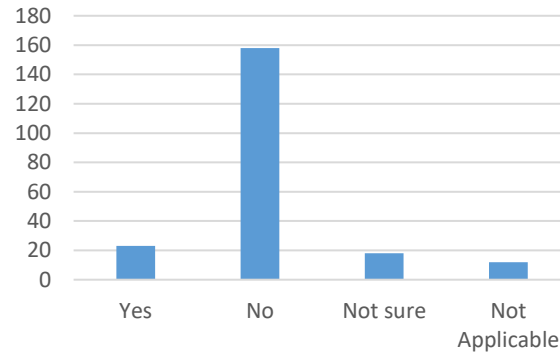
**Q9. Is your age 2 or 3 year old child(ren) accessing Flying Start Childcare?**

Ydy/Ydyn	23	Yes
Nac ydy/Nac ydyn	158	No
Ddim yn siŵr	18	Not sure
Amherthnasol	12	Not Applicable
CYFANSWM	211	TOTAL

**A yw eich plentyn/plant 2 neu 3 oed yn manteisio ar ofal plant Dechrau'n Deg?**



**Is your age 2 or 3 year old child(ren) accessing Flying Start Childcare?**



**Q10. Os ydych wedi dewis peidio â manteisio, pam? 46 ymateb**  
**Q.10 If choose not to, why? 46 responses**

Unable to access/not in area/not eligible	Do not know about it	Going to use it	Used it but unhappy	Other
22	16	3	1	3

Unable to access/not in area/not eligible	MSOA
Not eligible	Aberaeron & Llanrhystud
Don't live in flying start area	Aberaeron & Llanrhystud
We don't qualify as partner earns too much / not right postcode	Aberystwyth North
Not applicable	Aberystwyth North

Dim yn gymwys.	Aberystwyth North
Not available to me	Aberystwyth South
We aren't in the catchment area	Beulah, Troed-yr-aur & Llandysul
Not available to us	Beulah, Troed-yr-aur & Llandysul
Don't live in the area	Beulah, Troed-yr-aur & Llandysul
Ddim o fewn ardal Dechrau'n Deg	Beulah, Troed-yr-aur & Llandysul
Nothing suitable locally	Beulah, Troed-yr-aur & Llandysul
We do not live in a flying start area	Borth & Bont-goch
Not in area	Borth & Bont-goch
Not eligible	Borth & Bont-goch
No in area	Borth & Bont-goch
Do not qualify	Borth & Bont-goch
Wasn't provided the option, would have accessed it if it was fair for all families, not down to postcode alone, this should be changed	Cardigan & Aberporth
Not in catchment area	Cardigan & Aberporth
Not in the flying start postcode	Rheidol, Ystwyth & Caron
Not in a flying start area.	Rheidol, Ystwyth & Caron
Not available in my area but would use if it was	Rheidol, Ystwyth & Caron
Not available in my area	Rheidol, Ystwyth & Caron
<b>Do not know about it</b>	<b>MSOA</b>
Not heard of it.	Aberaeron & Llanrhystud
I'm not sure what it is, if we are eligible or if we need it. We don't qualify for free hours at the moment	Aberystwyth South
Haven't heard of it	Aberystwyth South
Ddim yn ymwybodol ohonno	Aberystwyth South
Not sure what flying start child care is	Beulah, Troed-yr-aur & Llandysul
Didn't know about it	Beulah, Troed-yr-aur & Llandysul
I'm not sure what flying start stands for. He attends playgroup twice a week which I pay for	Borth & Bont-goch



What is this?	Lampeter & Llanfihangel Ystrad
What is flying start? Never heard of it	Lampeter & Llanfihangel Ystrad
I'm not sure what this means? my two year old starts meithrin in January I therefore pay for her!	New Quay & Penbryn
Whats that? Me and my partner work so i assume we are not eligible for help	Rheidol, Ystwyth & Caron
Not heard of	Rheidol, Ystwyth & Caron
Not been informed about this.	Rheidol, Ystwyth & Caron
I don't know anything about it	Rheidol, Ystwyth & Caron
Don't know what it is	Rheidol, Ystwyth & Caron
Don't no about this but don't think I can get it in my Area	Rheidol, Ystwyth & Caron
<b>going to use it</b>	<b>MSOA</b>
They will be once they turn 3	Beulah, Troed-yr-aur & Llandysul
Ddim eto	Borth & Bont-goch
She will at 3	Cardigan & Aberporth
<b>Used it but unhappy</b>	<b>MSOA</b>
We have accessed flying start Childcare, but due to the illnesses picked up at nursery it is very disruptive to work, and expensive due to paying for full days. My child attended for 3 days out of his first 5 weeks, and has been off sick the rest of the time. Due to handing over at the door I also haven't been able to help him settle. It was easier not using Childcare as we didn't have to change plans at the last minute.	Aberystwyth South
<b>Other</b>	<b>MSOA</b>
Agwedd staff y cynllun	Beulah, Troed-yr-aur & Llandysul
She's in foundation funding sceme	Borth & Bont-goch
Not enough hours available	Borth & Bont-goch
Goes to nursery	Rheidol, Ystwyth & Caron

	<b>MSOA</b>	<b>Q. Were there any specific difficulties finding Childcare for one or more of your children? If so, why? Please also complete this box if you have had difficulty finding Childcare for a disabled child who is 18 or older.</b>	
	Aberystwyth South	I had to decline a job offer as there was no space for my child in a flying start nursery for lunch and afternoon session	
	Cardigan & Aberporth	<p>1. Cylch Meithrin does not offer enough hours or flexibility for me to be able to work (i.e only 2 hours twice a week and nothing in school holidays)</p> <p>2. I have only found one private nursery within a 30 minute drive and they are unable to open as their planning application has been pending since February. My daughter is registered to attend two days a week as soon as they can open but until then I am unable to return to work.</p> <p>I find the Welsh schemes very confusing (Flying Start, Cylch system). I wish there was more private nurseries rather than the trend towards local authority run Childcare.</p>	
<b>ANNEX 2</b>	<b>PARENT/CARER SURVEY ADDITIONAL COMMENTS</b>		
	<b>MSOA</b>	<b>Q. Were there any specific difficulties finding Childcare for one or more of your children? If so, why? Please also complete this box if you have had difficulty finding Childcare for a disabled child who is 18 or older.</b>	
	Aberaeron & Llanrhystud	There is no provision in Aberaeron	
	Aberaeron & Llanrhystud	Most Childcare settings have a waiting list. Not many in local area. Most settings target under 5s, not many options for older children 10+.	
	Aberaeron & Llanrhystud	Everyone in my area is full no spaces for Childcare	
	Aberaeron & Llanrhystud	My son has disabilities and Childcare was difficult. He is older now and his brother can help. I had to work in a school as there are no Childcare for older children who still need supervising. There are no holiday clubs and none of it is affordable as money is difficult anyway let alone paying Childcare during school holidays for 2 children.	
	Aberaeron & Llanrhystud	Lack of childminder services. Difficulty in obtaining Childcare to accommodate my Childcare and my working pattern (i work shifts until 8pm, Childcare closes at 6pm)	

Aberaeron & Llanrhystud	Yn anffodus does dim digon o ddewis yn ein hardal ni sef Aberaeron. Ma un meithrinfa sy tua 15munud i ffwrdd o'r ardal yn llawn dop. Wedi dod ben a chael un diwrnod yn y feithrinfa. Mae galw mawr o fewn yr ardal!!
Aberaeron & Llanrhystud	No issues finding Childcare but it was so expensive that I gave up work to look after my third child and am now self-employed. However I need to find employed work but I'm struggling to find anything on a term time only basis.
Aberaeron & Llanrhystud	The difficulties we came across were to do with after school care, between 3.30pm and 5.30pm. There is no after school club in school and only one after school childminder, who is currently full. We currently ask a grandparent once a week and I've had to finish work at 3pm for 3 days a week to unable me to pick up the children after school. This has stopped me working full time hours as my husband is self employed and works away.
Aberystwyth North	Initially we used a University run nursery when our children were younger which unfortunately had to close due to financial struggles. We then only had two other options for English medium provision in Aberystwyth, we went with a charity run playgroup which was the only option as there were lack of sessions in the other nursery. The staff was skilled and created a very homely environment for the children. However the charity based nature meant we had to be more involved as parents than what we ideally had time for and the premises were not (and are still not) fit for the purpose as it is small, damp and have mould growing up the walls, not ideal to keep little children in or staff for that matter. In general we felt like there were too little choice for English medium provision in preschool age. As much as we are very positive towards the Welsh language we strongly disagree with the idea of our children in a Welsh medium setting when there are no Welsh speakers in thier home to support them. For us as parents the Welsh language is an add on and not an essentially skill for our children as future citizens of an increasingly globalized world.
Aberystwyth North	When doing my undergrad degree at Aberystwyth, I had to get countless buses back & forth between campus & my eldest son's nursery & consequently his school. As the best nursery is actually out of town. Now I'm a postgrad with a second child, with the same issue, but in fact the nursery down the road from me has no spaces. The university used to have its own on campus nursery, but they couldn't afford to keep it on. The government needs to better support universities in providing Childcare options. Even a drop off Crèche on campus so I can run to a seminar would change my life.
Aberystwyth North	Does dim clwb ar ol ysgol ar gael ar hyn o bryd i fy mlant oherwydd ddiffyg staff.
Aberystwyth North	While looking for a job, my daughter's school only does after school club till 5:30 when most jobs I was looking at finished at 6. My partner sometimes works away so I cannot apply as I have no

	Childcare for that last 30mins. Also Cylch Meithrin starts at 8:45, although the staff are amazing it would be better if they started at 8:30 so again it gives me time to drop off and arrive at a job in time.
Aberystwyth North	All holiday clubs have closed in Aberystwyth or south of the town. The after school club has closed. How are single parents meant to work full time?
Aberystwyth South	Lot of childminders full. Child care is so expensive I had to reduce my work in health care to reduce some costs
Aberystwyth South	Wasn't able to get the hours we wanted at the nursery, found the financial support available was very complicated.
Aberystwyth South	After-school provision is very important for our own particular circumstances. Our employment means both my partner and I are contracted until 5:30pm. Unfortunately, most after school clubs only run until 5:00pm, which effectively means having to leave work at 4:45pm. Earlier starts to make up the working hours aren't possible due to the timings of school drop-offs.
Aberystwyth South	Struggled to find Childcare for my disabled child after nurseries re-opened in summer 2020 -- his private nursery made staff redundant and claimed they had none to act as his 1:1 even if there was funding via the Childcare Offer available. Luckily, found a different provider, but with shorter opening hours.  We're also struggling to find Childcare for mid-term school holidays and after 3.30 during term time at present.
Aberystwyth South	One after school provider in Aberystwyth , haven't operated since July. No regular holiday Childcare so have to rely on Urdd clubs, sports, football camps etc. Most of which have stopped operating in Aberystwyth since March 2020. Have been unable to find anything for my 13 year old in school holidays. Only football at the local town pitch had been available for 5 hrs a day during some of the school holidays for my 8 year old boy.
Aberystwyth South	Ar hyn o bryd nid oes clwb ar ol ysgol ar gael. Ar hyn o bryd mae fy nghyflogwr yn caniatau i mi adael y gwaith i nol y plant trwy ddefnyddio oriau "flexi" ac rydym i gyd yn gweithio o adref ond yn teimlo fod hyn yn hynnod anymarferol. Rwyf hefyd yn dechrau swydd newydd mis Tachwedd ac yn poeni ni fyddant mor hyblyg a mae clwb ar ol ysgol wedi stopio ar hyn o bryd achos diffyg staffio
Aberystwyth South	I work in a patient facing role in the NHS, and my work did not stop during the pandemic. Ceredigion Council responded well to ensuring that critical workers were able to access Childcare initially. As the pandemic progressed, there was a period during the second lockdown which was a real struggle, as there was no additional Childcare available outside of diminished school hours. Due to my work, it was hard to get Childcare. I ended up swapping Childcare with other parents who were also critical workers, but that I did not previously know so well. This worked okay, but felt like a juggling act.

Aberystwyth South	We are on a waiting list to increase our Childcare provision. There is not enough provision of Childcare through the medium of Welsh. The cost of Childcare is a huge burden on us as a family. We struggle to pay the cost for even part time Childcare. We do not have family nearby to help with Childcare arrangements - and even if they were near, grandparents work full time as well. The fact that we are on a high income and struggle to pay Childcare costs really highlights the astronomical costs of having a child in Wales. These costs prohibit many women from returning to work. I myself am unable to have a second baby until we can access the 30 hours a week Childcare offer as there is no way we would be able to afford pre-school costs for 2 children at the same time. This coupled with the fact that birth rate is decreasing across the whole UK, and areas such as Ceredigion are particularly hit is contributing to a burgeoning economic crises on top of the social and healthcare crisis already taking place!!
Beulah, Troed-yr-aur & Llandysul	I work shifts, early starts or late finishes. No Childcare will have my children at those times. My partner also works unsociable hours.
Beulah, Troed-yr-aur & Llandysul	Finding it difficult to find after school care for my Child. The school she attends no longer provides this service since COVID-19. This has made it difficult for us as a family as well as many other families in the area.
Beulah, Troed-yr-aur & Llandysul	Yes. Post COVID-19-19 as a household we were reliant on breakfast club and after school Club as we work full time. This facility was taken away by the local Authority in 2020. Breakfast club has recently been reintroduced. But After school club provision has not been reinstated making it increasingly difficult for full time working parents, especially for those still required to work from home. All childminders are either full or can not facilitate school pick up. It is also getting increasing difficult to rely on family and friends due to the increase in COVID-19 numbers within the county.
Beulah, Troed-yr-aur & Llandysul	There are currently no playschemes running in the area. If our PA has holiday or sickness I have no cover. There are no after school clubs for disabled children.
Beulah, Troed-yr-aur & Llandysul	No after school club available still!!!
Beulah, Troed-yr-aur & Llandysul	Trying to find information regarding schools and when to apply, when they start and what is available. Very challenging to find this information without ringing the schools and with working it is hard to find time to do this during school hours
Beulah, Troed-yr-aur & Llandysul	Because the school. Ysgol bro teifi do not provide after school care currently. And didn't offer any support during the COVID-19 pandemic. Where as many schools in Carmarthenshire had this options for student parents. Was sooo disappointing and difficult
Beulah, Troed-yr-aur & Llandysul	No after school or holiday provision in a 3-19 school. Causing lots of problems.

Beulah, Troed-yr-aur & Llandysul	No after school club at school and this directly impacts hours I'm able to work. No school holiday provision that also has an impact on hours I can work during holidays.
Beulah, Troed-yr-aur & Llandysul	Before the COVID-19 lockdown the school used to offer an after school club however this was unregistered and we as two full time working parents felt at a disadvantage as we could not benefit from the schemes available to support us. This needs to be looked at by Welsh Government as the financial schemes available to working parents cannot be used to their fullest as Childcare settings are not registered. Working parents get very little support to cover the cost of their Childcare and therefore having varied registered Childcare would mean there would be a choice of different Childcare as well as enabling access to the financial support. Also it would start to level the playing field slightly between working parents and non working parents, who seem to be able to access a lot more financial support to fund Childcare. We are being penalised for being working parents who are trying to be the best role models possible and setting good examples.
Beulah, Troed-yr-aur & Llandysul	I was happy with the local school nursery and the Cylch Meithrin within the school is fantastic the staff really do go above and beyond caring for the children .... I would love to find some local holiday clubs with flexible times for my 2 and 3 year old as I don't need 8-6 which is what seems to be on offer flexible drop off and pick up just so the children have a few hours would be brilliant during holidays
Beulah, Troed-yr-aur & Llandysul	Currently no after school club which is a massive problem to constantly try and arrange around work, having to depend on family to help out. What job finishes at 3:00???
Borth & Bont-goch	Waiting lists for nursery's are long. Local cylch is only 9-12 with no afternoon support, useless if both parents work and have no family nearby to do lunchtime pickup and afternoon care. Afternoon care provided in same location for those that need it would be ideal, even if had to pay for it. Otherwise there's absolutely no benefit to parent of leaving childminder /private nursery. Want to support the cylch, ease transition into school by being on same school site/similar children etc but can't justify it when would have to leave work at lunchtimes
Borth & Bont-goch	Breakfast club and after school club closed during COVID-19 as required, starting to open back up again which is good news.
Borth & Bont-goch	Our children are adopted, not many Childcare providers have a good understanding of childhood trauma
Borth & Bont-goch	No Childcare available for disabled children and teenagers either during term time or school holidays in Ceredigion. This is a long term problem and has prevented me from returning to work in the healthcare sector
Borth & Bont-goch	Childcare provided by gogerddan nursery during school holidays is exceptional and the hours are fantastic, staff are also exceptional. The issue I gave is breakfast club provided by the school, it

		starts at 8.20am, I have to start work at 8:30am. 8am would be far more suitable given the morning rush to get to work and find parking to get to my place of work. I am a single parent working 48 hours a week
Borth & Bont-goch		Unable to find Childcare to start when i needed it to due to availability for both of my children. Wanting to access Welsh/Bilingual care but unable to find suitable ones.
Borth & Bont-goch		I wasn't able to put my child into a private nursery when we moved back into the area as they all have waiting lists. We were fortunate to utilise Cylch however.
Borth & Bont-goch		Both my children have medical needs and one has learning difficulties which make finding a Childcare setting difficult. They are both of an age where most children could be left alone but they can't. There isn't child care for children like this. None of the children I know with additional needs are able to access any form of Childcare other than those who use respite services which is nit the same thing.
Borth & Bont-goch		School breakfast club opening at 8:25 would like them to consider earlier start so I can actually get to work for 8:30am
Borth & Bont-goch		The Childcare we have is ok the only issue is that our Pre-school/ Breakfast club doesn't start early enough at 8.20am. I'm aware other primary schools in our area start at 8-8.10am
Borth & Bont-goch		Once COVID-19 hit, our private nursery were refusing to take children under the age of 2 once restrictions ended. My husband and I were both key workers, and once key worker Childcare finished and schools reopened we had to rely on family and friends to take care of our youngest. She has since turned 2 and can now access the Childcare, but it was very difficult for us at the time.
Borth & Bont-goch		The cost is insane compared to minimum wage, working is pointless if all I'm doing if working so someone else can be paid to look after my kids.
Borth & Bont-goch		Childcare is in such high demand that it seems almost impossible to get a place
Borth & Bont-goch		My child is autistic
Borth & Bont-goch		No childminder in Borth anymore. No Cylch Meithrin in Borth anymore. I work from home therefore Childcare provision in this area is more convenient without having to travel further afield to Aberystwyth.
Cardigan & Aberporth		The Childcare hours available are Monday - Friday 9-5. I have turned down several jobs I desperately needed due to insufficient Childcare.
Cardigan & Aberporth		I rely heavily on friends and family for help with my Childcare as my hours change weekly so is hard to find a place with a childminders also as I work less than 16 hours I'm not sure I'm intilted to help with cost of Childcare, it's worse in the holidays when you need even more help as the hours are longer as the children aren't in school so can be harder to find family and friends who are willing to

		help when they also have their own children at home or perhaps don't want to do the longer hours for free
Cardigan & Aberporth		No nursery in the area, nearest is over 10 Miles away and very few childminders that have spaces
Cardigan & Aberporth		Childcare in our area is very poor there are no spaces available for my child, for been picked up after school I start my new job next month with the NHS which I will be working all shifts. Luckily our local school has just started breakfast club so my husband can drop him at school, but really struggling to find Childcare for after school. If the government want parents to work they need to provide more Childcare facilities in this area.
Cardigan & Aberporth		Nothing in the area except for childminders. Childminders are all full. Childminders couldnt take both children so would have to split them up and find different childminders. Was stuck in the rut of cant accept a job as no Childcare, Childcare becomes available but cant accept it as no job offers etc. This went for a year.
Cardigan & Aberporth		No Childcare available for before or after school for a 4-5 year old. Spaces all full or unavailable due to COVID-19 restrictions. Most Childcare has children transitioning from full time to wrap around care, so not accepting new children. Few available were not in my area.
Cardigan & Aberporth		There is no nurseries in Cardigan
Cardigan & Aberporth		Limited cylch meithrin groups which work around working parents. Usually 9-11.30 put as a full time teacher this is impossible. Need a reasonably priced Childcare option and not available. Need cylch meithrin all day. Currently spending £48 a day on Childcare.
Cardigan & Aberporth		1. Cylch Meithrin does not offer enough hours or flexibility for me to be able to work (i.e only 2 hours twice a week and nothing in school holidays 2. I have only found one private nursery within a 30 minute drive and they are unable to open as their planning application has been pending since February. My daughter is registered to attend two days a week as soon as they can open but until then I am unable to return to work. I find the Welsh schemes very confusing (Flying Start, Cylch system). I wish there was more private nurseries rather than the trend towards local authority run Childcare.
Cardigan & Aberporth		I am a nurse working 13 hour shifts and my partner is a plumber working 8-5 daily. Pre COVID-19 my partner would drop our youngest at breakfast club before going to work himself and then my son would stay in after school club until my partner finished work. Now we have to rely on a taxi to take my youngest son home because there is no after school club. Occasionally I can ask friends to help but constantly asking for favours is not nice.



	There are no there Childcare options in the area, childminders are all full. Childcare has been extremely difficult for the last two years, with services not being available, even to myself as a front line worker as an intensive care nurse. As my partners was not classed as a front line worker we had no help. Resulting in unpaid days off or having to leave our children by themselves. Childcare is without doubt a problem in the area for working families.
Cardigan & Aberporth	There is no Childcare in Cardigan except childminders who are all full! Something needs to be done and a Crèche set up so parents can work
Cardigan & Aberporth	Welsh medium childminders are booked up in advance(have a waiting list) and are very limited. It is important to us as a family to have a first language Welsh setting for our children as we are first language Welsh, many of the childminders are not fluent or confident in first language Welsh. I also find that the registration is a Lengthy process and puts many off childminding because of the length it takes and the extremes needed to start up.
Lampeter & Llanfihangel Ystrad	Childcare is expensive and there is not enough provision for my needs. Places fill up fast. I am currently on maternity leave and my son will be 10 months old when I return to work. There are not many Childcare providers that look after children that young.
Lampeter & Llanfihangel Ystrad	Prefer a structured/sports activities. However very few available and only certain occasional days/times in the holidays, and none during term time. We would be happy to pay, but they're just not available. Also no after-school club available since COVID-19. Lack of available Childcare is forcing me to reduce my working hours and I work for the NHS.
Lampeter & Llanfihangel Ystrad	There is nothing available suitable for older children. When younger they went to Ray Ceredigion but now they find it too childish and boring. There are a few places like Urdd Llangrannog and Llain activity centre etc. that run full day activities for older children however they don't take Childcare vouchers so are too expensive to send the kids every day during the holidays when my husband and I need to work.
Lampeter & Llanfihangel Ystrad	Yes we have difficulty as there is no after school club in our area & we have to travel to holiday club if we are able to get a place . We have no family assistance
Lampeter & Llanfihangel Ystrad	If my sons play leader at meithrin had not been as informed or knowledgeable about behavioural difficulties, I think I would have had issues with him being able to stay at his placement,but thankfully she had personal knowledge of this and was able to help to get extra government funding to enable my boy to get extra support whilst there. There now is a support worker to help all the staff during many difficult times with him. Had the play leader not identified this problem so early on,I believe there would have been huge difficulty for him in keeping a place within meithrin.

Lampeter & Llanfihangel Ystrad	Lack of school holiday provision and after school provision makes it very difficult to work full time
Lampeter & Llanfihangel Ystrad	There is no Childcare provision in Tregaron and no after school club so dependent on family which is very stressful
New Quay & Penbryn	Really need the schools to open up the after school club facility, due to COVID-19 I can't ask vulnerable family members to help with school pick ups and Childcare. I'm having to take time off work to do it myself and it's having a negative impact on work, family life and mental health- don't understand why they haven't restarted when Carmarthenshire etc have?!
New Quay & Penbryn	Non verbal autism and hypermobility, Childcare can't cater for his needs they are not trained
New Quay & Penbryn	There is no Childcare available so it is impossible to work.  The school has a breakfast club. There is after school club 3 times a week, but at least one session is cancelled a week so it is unreliable.
New Quay & Penbryn	There is no holiday care available.
New Quay & Penbryn	There are only 2 childminders in my area and both are full with long waiting lists. The school does breakfast club which is great but after school clubs get cancelled at short notice and only goes on till 4 30 which makes it difficult to do full time hours as a single parent
New Quay & Penbryn	There is only 2 childminder in my area that are both full. The school does breakfast club which is great but after school club finishes at 4.30 which is difficult when working 45 mins away till 5pm.
New Quay & Penbryn	No breakfast club or after school clubs at our child's school. No child minder willing to do pick ups.  No holiday clubs so working during holidays are extremely difficult and we loose a lot of money.
New Quay & Penbryn	Yes. All of them. There is virtually nothing available. No wraparound care. Meithrin was Only 3 hours a day when kids little. After school club only been available last couple of years and only 3 days a week and only for 1 hour, finishes at 4:30pm there is no provision for after school care in secondary school..
New Quay & Penbryn	Our school offers no breakfast or after school club, and the meithrin is only open term time, 9-3 (max). Childminders who can collect from school are impossible to find, and this severely affects the hours I can work due to the industry I am in. If I could get Childcare until 6.30 I could massively increase my working hours, and there is demand for that, but I have unreliable free Childcare (family)
Rheidol, Ystwyth & Caron	Little or no Childcare available for older - secondary age children Limited availability for my primary age child

Rheidol, Ystwyth & Caron	<p>Difficulty finding affordable Childcare in holidays.</p> <p>Difficulty finding places and space for child care in holidays.</p> <p>Difficulty finding Childcare in holidays that matches shift patterns.</p> <p>Employer not flexible in holidays to accommodate Childcare.</p>
Rheidol, Ystwyth & Caron	Childcare is so expensive for two children. It's hardly worth working. More government help is needed for those who work but don't receive universal credits
Rheidol, Ystwyth & Caron	<p>I found it difficult this summer to find Childcare for my daughter, we needed a welsh language setting due to my daughters delayed speech, but were unable to find anywhere. I'm the end there was one place left in st padarns, although they are a bilingual setting the key worker speaks welsh and they have been very accommodating of my daughters need and we couldn't be happier.</p> <p>We also looked for welsh childminders but there was non available- there is a huge shortage of Childcare providers in Welsh in Aberystwyth area.</p>
Rheidol, Ystwyth & Caron	<p>My son has multiple and complex needs and attends a resource base educational setting managed by the local authority. There is currently no after school provision in my local town and although we have been awarded direct payments to support him in attending after school enrichment activities, there are no Personal Assistants applying for the post. As my husband and I do not live near family, and our friends are not able to help us with after school Childcare because of his complex medical and behavioural needs, we have to either use our annual leave on covering after school care or face reducing our working hours and a subsequent reduction in our family income to look after him after school on the days that we are both working.</p> <p>There used to be an after school club that could apply for additional funding to pay an additional staff member to support my son 1:1 but that closed before COVID-19 due to staffing issues. We desperately need something similar to be reinstated in our local area to enable parents to stay in work.</p>
Rheidol, Ystwyth & Caron	My children's school does not provide any after school club wich means unless I pay people (other parents usually) to take and feed my children I can not work full time hours and even if I pay somebody to have them I sometimes pay so much that iam actually out of pocket
Rheidol, Ystwyth & Caron	Relying on buses to and from nursery
Rheidol, Ystwyth & Caron	Moving from England to Wales, we wished to send our daughter to a bilingual nursery so that she could adapt to the nursery and learn the language gradually rather than be thrown in at the deep end into a Welsh only nursery. This restricted or choice in the area.

Rheidol, Ystwyth & Caron	There is no Childcare where I live. There is no after school club. So we have to work earlier and longer hours around these issues
Rheidol, Ystwyth & Caron	Long distance to travel to any Childcare providers
Rheidol, Ystwyth & Caron	My 11 yr old is too old for holiday clubs, but not old enough to be left all day at home alone. Holiday club difficult as some not allowed to operate due to COVID-19 and now it can't still on reduced numbers so getting a place is hard.
Rheidol, Ystwyth & Caron	Both of us work full time - we have no family living near us that are physically well enough to help with Childcare of our 4 year old during the school holidays. Our child starts school in Jan 2022 and between the two of us, we just do not have the annual leave entitlement that covers all 11 weeks of the school holidays. Since the pandemic, holiday club provision has been slow to open back up. We are concerned that this will continue to be the case into 2022. At this rate one of us might as well quit work.
Rheidol, Ystwyth & Caron	After school Childcare is almost non-existent around Aberystwyth.
Rheidol, Ystwyth & Caron	Lack of transport makes it difficult to take my children to certain childminders/Meithrins/Childcare
Rheidol, Ystwyth & Caron	Llwynyreos primary haven't run breakfast or after school clubs since COVID-19 lockdown in 2020, I need to be in work Penglais school by 8.30, my Autistic son can't go into unit until 8.45
Rheidol, Ystwyth & Caron	The hours don't fit with most jobs . In a remote location, many people have to travel a distance to or from work. I'm a teacher , but am currently working minimum wage teaching online, because the Childcare available to me isn't available early or later , so I can't travel to or from teaching jobs in time to collect my son from Meithrin. I could put him in a private nursery , but I want him to have a welsh medium nursery and I believe that the ethos of the Cylch is exactly what I want for my son. I sacrifice my salary and career to allow him to get the welsh education I feel will be best for him.
Rheidol, Ystwyth & Caron	No nurseries or childminders around to the Tregaron/pontrhydfendigaid area. My child is 17 months
Rheidol, Ystwyth & Caron	There is no nurseries/childminders in the area for my 18month old boy!
Rheidol, Ystwyth & Caron	My job starts at 8am which means I need to leave the house before 7am to be there by 7:40 to change and have hand over. My eldest attends primary school and there is nothing in the area to cater for that time in the morning. Breakfast club starts after 8am and even though she is 10 I do not feel comfortable leaving her at home by herself. On days where both myself and my partner may be

		at work we need something for that time in the morning, which is not available as childminders here mainly cater for younger children and later in the morning.
	Rheidol, Ystwyth & Caron	There aren't enough providers in our area for under 2 years old. We would have to travel half an hour and it is expensive!
	Rheidol, Ystwyth & Caron	We had to travel 10 miles when our children were younger to access welsh Childcare provision - no local provision available
	Rheidol, Ystwyth & Caron	I am unable to claim child tax credits for my third child. I am unable to work due to no local Childcare being open long enough for the working hours I need.
	Rheidol, Ystwyth & Caron	I need Childcare locally that's open every weekday to accommodate a 9am - 5pm job. With my third child I cannot claim child tax credits so I can't afford to pay for Childcare to go to work.
		there is a massive shortage of child care in Ceredigion and lack of before or after school clubs which has got worse thanks to COVID-19 and there are very limited Childcare providers that can help after school and holidays in this area especially when you are a shift worker plus add single parent to the mix who has very little support network the stress of organising it all and juggling work through and since the pandemic has seriously stressed me to the max but you just plough through these things as you have no other choice
		Previous provision has been withdrawn and not re-instated since cv-19- i.e Childcare after school, which has caused great difficulty and have had to change my working hours and pattern of work to accommodate and now rely heavily on family, which results in them not being able to work. Lack of holiday clubs has also had an impact and family holidays i.e time off all together isn't that possible to achieve as we have to juggle to manage Childcare issues. This can be particularly difficult when employers are reluctant to give additional leave or are trying to be equitable to share out leave amongst all their employees.
		Childminders in Cardigan don't usually work on Fridays. Childcare provision is (for us) unreliable at times, with childminder taking holidays in school holidays
	Aberystwyth North	Parent students, while in the minority, seem regularly overlooked by both the universities and the authorities. We need way more support, financially & morally.
	Rheidol, Ystwyth & Caron	Would have liked to have been able to tick something saying full time stay at home parent rather than just unemployed not seeking work.