



Gwybodaeth Teuluoedd, Gofal Plant a Chwarae

Family Information, Childcare and Play



Carmarthenshire County Council

Carmarthenshire Childcare Sufficiency Assessment (2017-2022)

SUMMARY REPORT

Disclaimer – Please note this is a 5 year Assessment,
information/data is subject to change



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1. INTRODUCTION

The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016, and recent Welsh Government Statutory Guidance issued in July 2016 places a Statutory Duty on Local Authorities to undertake a full Childcare Sufficiency Assessment at five year intervals (previously at three year intervals). The Assessment is a necessary step to securing 'sufficient' childcare provision in the County. It aims to identify childcare gaps, make recommendations that will meet the needs of parents and carers living in the County, and ensure Carmarthenshire County Council fulfils its statutory childcare sufficiency Duty.

Carmarthenshire County Council has published three full Childcare Sufficiency Assessments to date in 2008, 2011 and 2014 respectively. Action Plans were developed linked directly to the recommendations that had been made in all three Assessments. These have been reviewed and updated on an annual basis in order to monitor progress made.

When discussing '**sufficient**' we mean having the right type and quantity of high quality accessible childcare to meet the needs of parents/carers in Carmarthenshire concentrating on meeting the needs of families for:

- the provision of childcare in which the Childcare element of Working Tax Credit/Universal credit is payable;
- the provision of childcare which is suitable for disabled children;
- the provision of childcare involving the use of the Welsh language.

The Assessment identifies barriers experienced by:

- (i) working parents*
- (ii) parents seeking work or training opportunities*
- (iii) unemployed households*
- (iv) low income families*
- (v) lone parent families*
- (vi) families from ethnic minority backgrounds*
- (vii) families with children who have special educational needs or a disability*

The sufficiency Duty applies to childcare for children **0 to 14 years** and extends to age **17** for children with disabilities or Special Education Needs (SEN).

The purpose of undertaking an Assessment is to enable Local Authorities to secure sufficient childcare in order to support parents/carers in:

- **Taking up or remaining in work;**
- **Undertaking training in order to assist them in returning/entering into paid employment.**

It is not the intention to oblige Local Authorities to meet the individual childcare needs of every working family, but to ensure that at a community level, the Local Authority is taking strategic action with its partners to address gaps in childcare. Local Authorities are expected to support the development of childcare where there is sufficient parental demand that a childcare setting or childminder could operate and be sustainable.

The Local Authority is not under a Duty to provide the childcare directly. It is intended that formal childcare should in the main be provided by providers in the private and voluntary sectors.

The cost of childcare will be met by parents, with parents who are eligible being able to claim working tax credits/universal credit in respect of qualifying registered childcare.

In carrying out the full Childcare Sufficiency Assessment, several lines of research were followed:

- Analysis of demographic and socio-economic data from the Office of National Statistics, HM Revenue and Customs, Welsh Government and various Carmarthenshire County Council departments, to give an indication of the profile of factors affecting demand and the ability to pay for childcare in Carmarthenshire.
- Consultation with **1,235** local parent/carers via a questionnaire survey undertaken between September and December 2016.
- Consultation with **102** grandparents via a questionnaire survey undertaken between September and October 2016.
- Consultation with **81** local employers via a questionnaire survey between October and November 2016.
- Consultation with **100** nursery, infant and primary school Head Teachers via a questionnaire between September and October 2016.
- Consultation with CWLWM partners via a questionnaire in September 2016.
- Consultation with hard to reach groups including; parent/carers of disabled children in December 2016 and Gypsy/Roma/Traveller Community via focus groups facilitated in February 2016.

- Consultation with **360** children and young people who attend a cross-section of childcare settings, via analysis of questionnaires, between November and December 2016.
- Analysis of supplementary data derived from a range of additional sources including Care and Social Services Inspectorate Wales (CSSIW) and DWP/Jobcentre Plus.
- Analysis of Self Assessment of Service Statement (SASS) data completed online by **173** local registered childcare providers for CSSIW. (This was not a complete data set and only represents 77.8% of registered childcare providers in Carmarthenshire).
- Analysis of Family Information Service data.
- Analysis of PLASC data (2016).

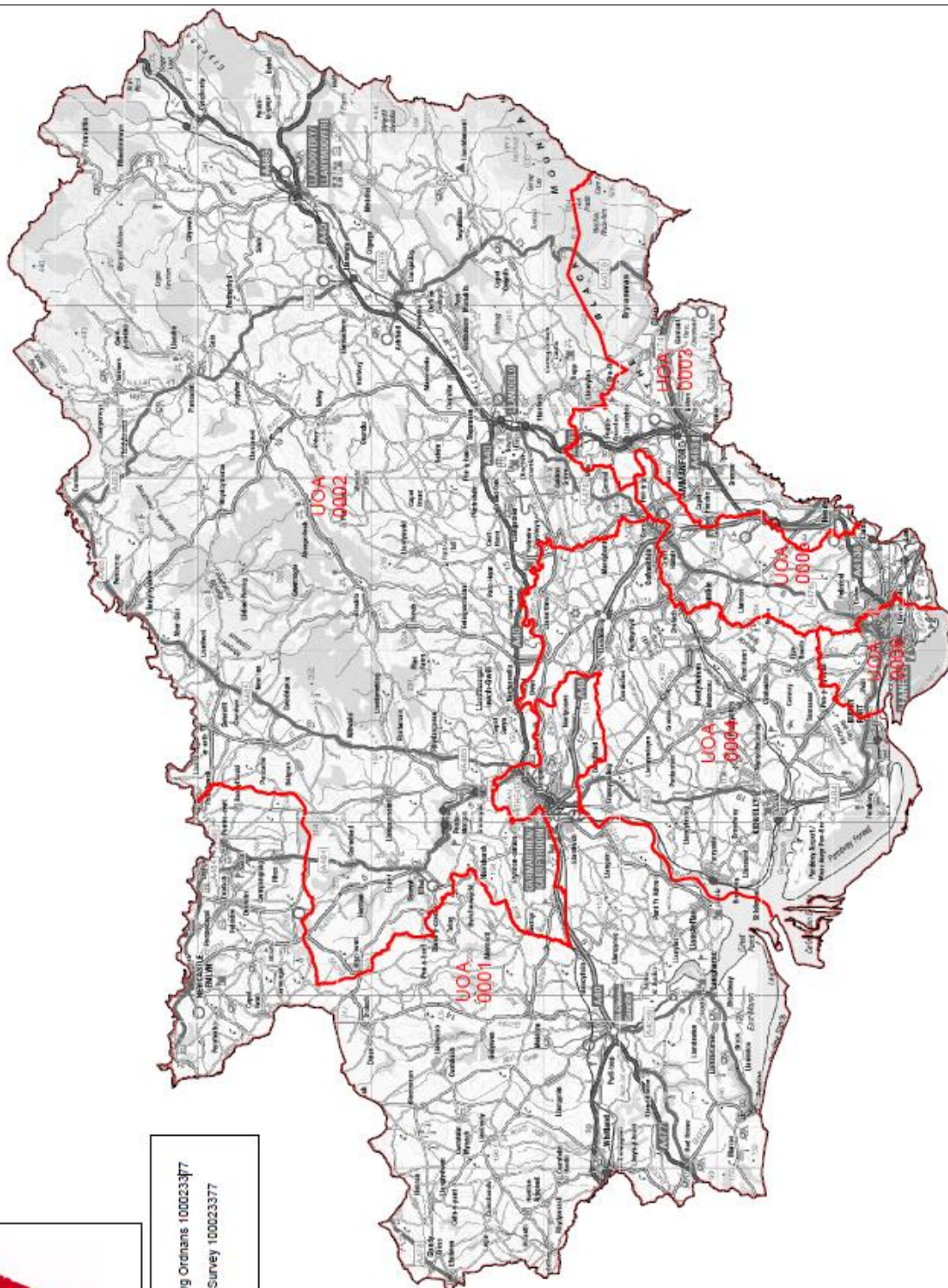
The standard geography used for small area data in England and Wales are Lower Super Output Areas (LSOA's), which are built from groups of output areas used in the 2011 census. In 2016 there were 112 LSOA's in Carmarthenshire. Much of the data collected at LSOA level has now been aggregated to Carmarthenshire Upper Output Areas (UOAs), in order to be able to draw findings and recommendations across border areas. For the purposes of this Report we have used the same six Community Areas in line with the Carmarthenshire Local Well Being Needs Assessment 2016 (**Fig. 1.1**)

Fig: 1.1 Carmarthenshire Upper Output Areas (UOAs)

Fig: 1.1 Carmarthenshire Super Output Areas (UOAs)

Carmarthenshire Upper Output Areas (UOAs)

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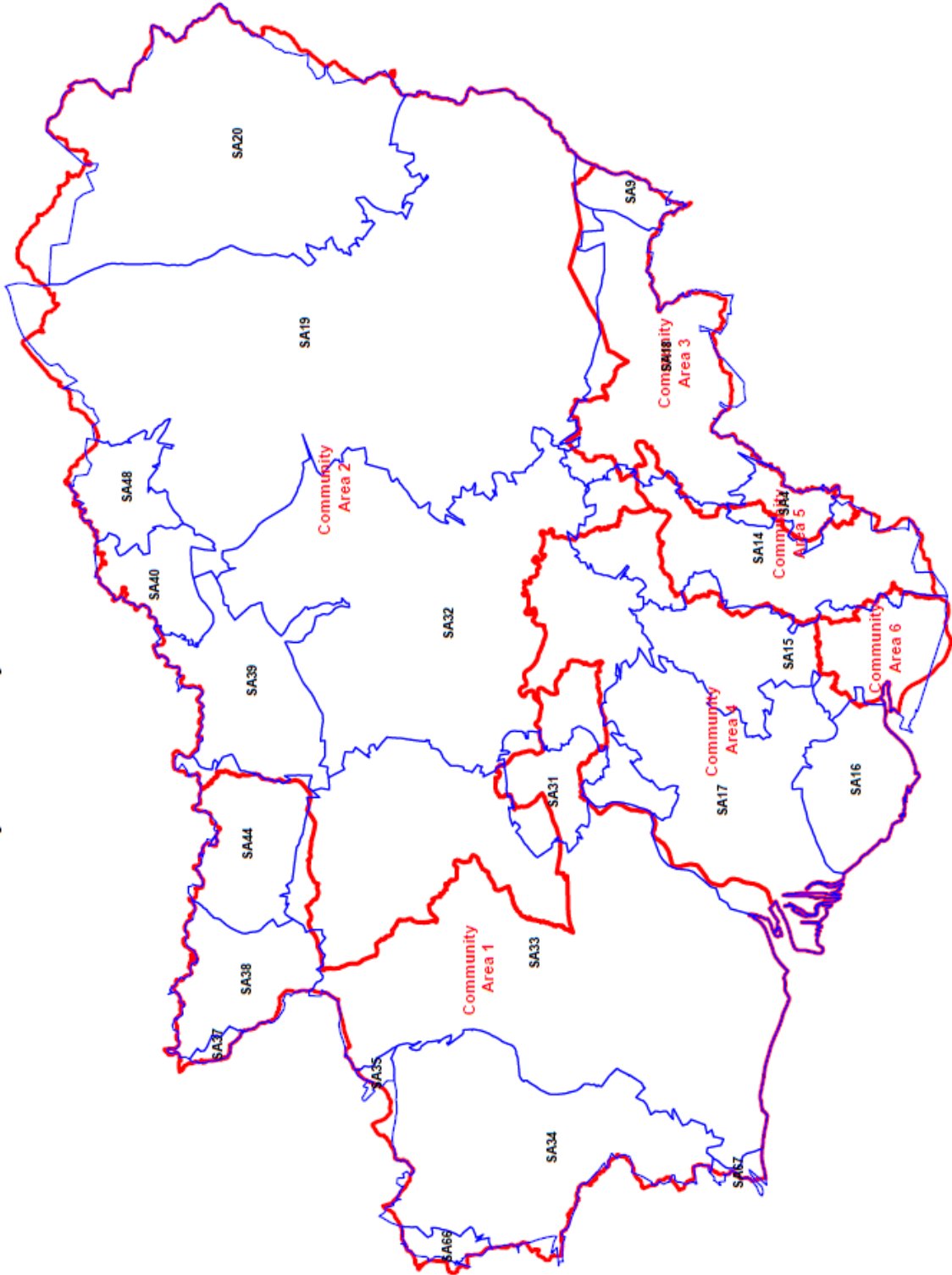
Upper Output Areas	Population
UOA 0001	31,180
UOA 0002	33,517
UOA 0003	29,204
UOA 0004	31,522
UOA 0005	30,424
UOA 0006	29,051

Fig: 1.2 Carmarthenshire Postcodes by Community Area



Carmarthenshire Postcodes by Community Areas

POSTCODE
SA4 8
SA14 6
SA14 7
SA14 8
SA14 9
SA15 1
SA15 2
SA15 3
SA15 4
SA15 5
SA16 0
SA17 4
SA17 5
SA18 1
SA18 2
SA18 3
SA19 6
SA19 7
SA19 8
SA19 9
SA20 0
SA31 1
SA31 2
SA31 3
SA32 7
SA32 8
SA33 4
SA33 5
SA33 6
SA34 0
SA35 0
SA37 0
SA39 9
SA4 0
SA40 9
SA44 4
SA44 5
SA48 8
SA66 7



Carmarthenshire Upper Output Areas (Geography Boundaries)

Below is a breakdown of the geographical boundaries by Upper Output Areas (UOA's). These areas were selected by the Public Service Board whilst undertaking the Carmarthenshire Local Well-being Needs Assessment 2016 in order to obtain robust and statistically significant data based on areas of similar population sizes (approximately 30,000 per area).

Carms USOA 0001
Carmarthen Town North
Carmarthen Town South
Cenarth
Laugharne
Llanboidy
Llangeler
Llangunnor
Llansteffan
St Clears
Trelech
Whitland

Carms USOA 0003
Ammanford
Betws
Garnant
Glanamman
Hendy
Llandybie
Pontamman
Quarter Bach
Saron
Tycroes

Carms USOA 0005
Bynea
Dafen
Felinfoel
Llangennech
Llannon
Llwynhendy
Penygroes
Swiss Valley

Carms USOA 0002
Abergwili
Carmarthen Town West
Cilycwm
Cynwyl Elfed
Cynwyl Gaeo
Llandeilo
Llandovery
Llanegwad
Llanfihangel Ar Arth
Llanfihangel Aberbythych
Llangadog
Llanybydder
Manordeilo & Salem

Carms USOA 0004
Burry Port
Glyn
Gorslas
Kidwelly
Llanddarog
Llangyndeyrn
Pembrey
Pontyberem
St. Ishmael
Trimsaran

Carms USOA 0006
Bigyn
Elli
Glanymor
Hengoed
Lliedi
Tyisha

2. CARMARTHENSHIRE CONTEXT

Carmarthenshire is the third largest county in Wales in geographical terms, covering some 2,370 square kilometres. The population density is low, at 78 persons per sq. kilometre, compared with 140 persons per sq. kilometre for Wales as a whole. This sparsity of population is more apparent in rural Carmarthenshire than it is in the south and east of the County. A large proportion of Carmarthenshire's population resides in the main urban centres of Llanelli, Carmarthen, Ammanford and Cross Hands.

The table below shows the population density for Carmarthenshire and Wales. Greater sparsity can be associated with difficulties with accessibility, with longer travel distances, and a poor public transport infrastructure. Just over half (53%) of the population of Carmarthenshire live in 'sparse' or 'super sparse' areas. Carmarthenshire is a predominately rural county so population sparsity and geographical isolation can have important implications for the nature and type of childcare especially in terms of accessibility, cost of service provision and on the provision of training for childcare staff.

Table 2.1: Population density, Carmarthenshire, Wales, 2014

	Mid-year 1991	Mid-year 2001	Mid-year 2011	Mid-year 2012	Mid-year 2013	Mid-year 2014
Carmarthenshire	71.6	73.3	77.6	77.8	77.9	78.0
Wales	138.6	140.4	147.8	148.3	148.7	149.1

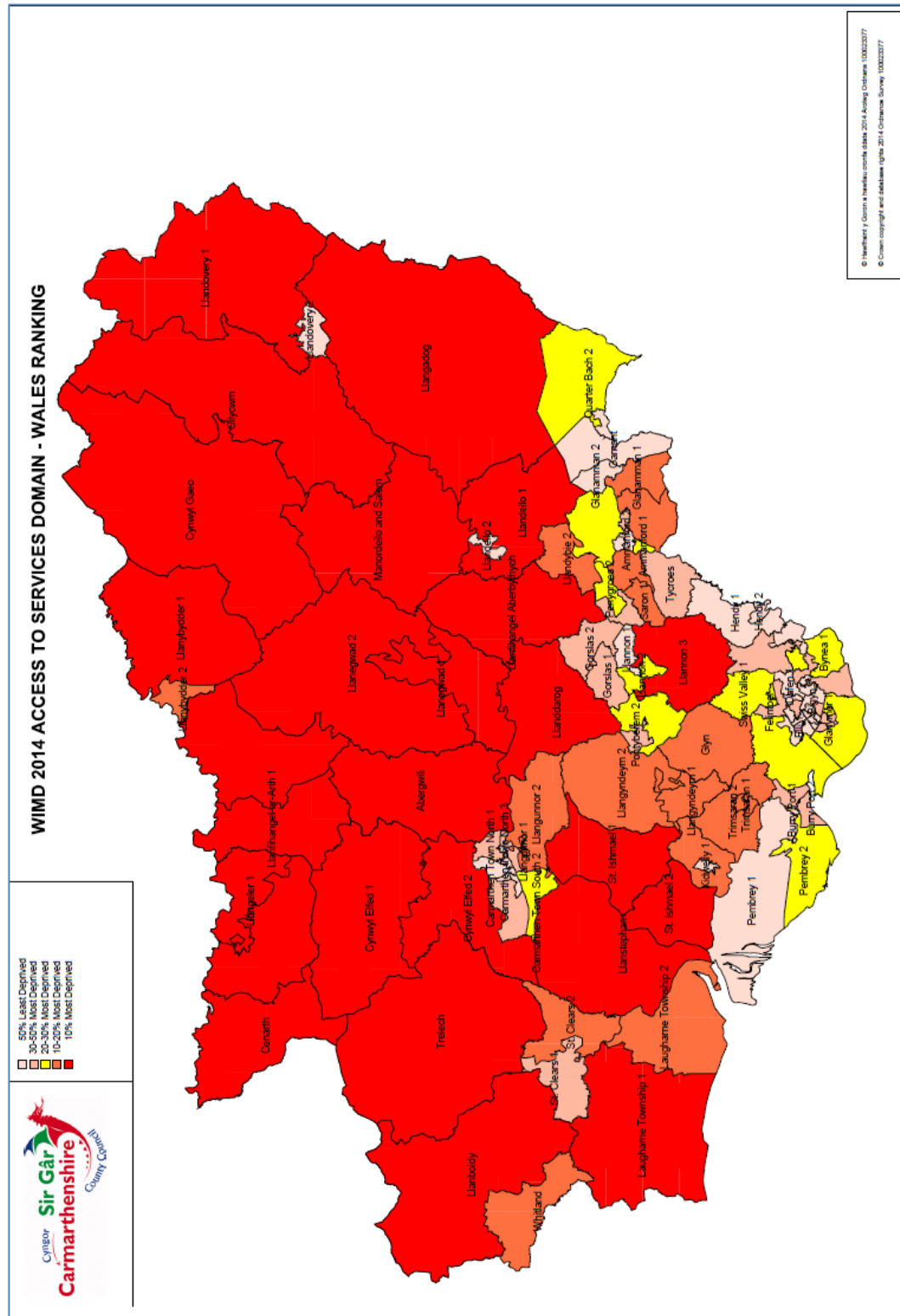
Source: ONS, 2015

A Geographical Access to Services Deprivation Domain combines a number of indicators relating to access to primary schools, public libraries, leisure centres and secondary schools. The results are summarised in Fig 2.1 based on WIMD Access to Services, 2014. The LSOA's with the highest scores are those with the highest levels of deprivation in relation to geographical accessibility. The most accessible areas are concentrated in Llanelli and Aman community areas and Carmarthen town.

At mid-2015 the population of Carmarthenshire was estimated at **185,123**. This is an increase of 806 on the mid-2012 estimate of **184,317**. An increase of just **0.4%** between 2012 and 2015. The County of Carmarthenshire has the fourth highest population in Wales. The highest proportion of people were aged over 45 accounting for **50.2%** of the total population and **22%** of the total population are over 65. The population change in Carmarthenshire from 2001 to 2015 is +11,732 (**+6.7%**).

According to the 2011 Census there were **37,642** children and young people between the ages of **0 to 17 years** old living in Carmarthenshire. **5.6%** of the population were aged **0 to 4 years** and **11.1%** of the population were aged **5 to 14 years** of age. It is estimated that by 2020 there will be a total of **43,000** children and young people aged 0 to 19 in the County. The highest proportion are children aged **0-4 years** and **5-10 years** old, with both age groups at **31%** followed by **11-15 year olds** at **25%** and **16-19 year olds** at **13%**.

Fig 2.1 WIMD 2014 Access to Services Domain



Between 2012-15 the child population aged **0-14 years** old has increased slightly, with the largest increase in children aged **8 to 10 years** old and **3 and 4 year olds**. The largest decrease has been in children aged **2 years** and under. This suggests that the demand for childcare for children aged **2 years** and under is likely to decrease, whilst the demand for childcare for children aged between **3 and 10 years** old is likely to increase. Therefore the demand for breakfast clubs, after school care and holiday care provision in Carmarthenshire is likely to increase.

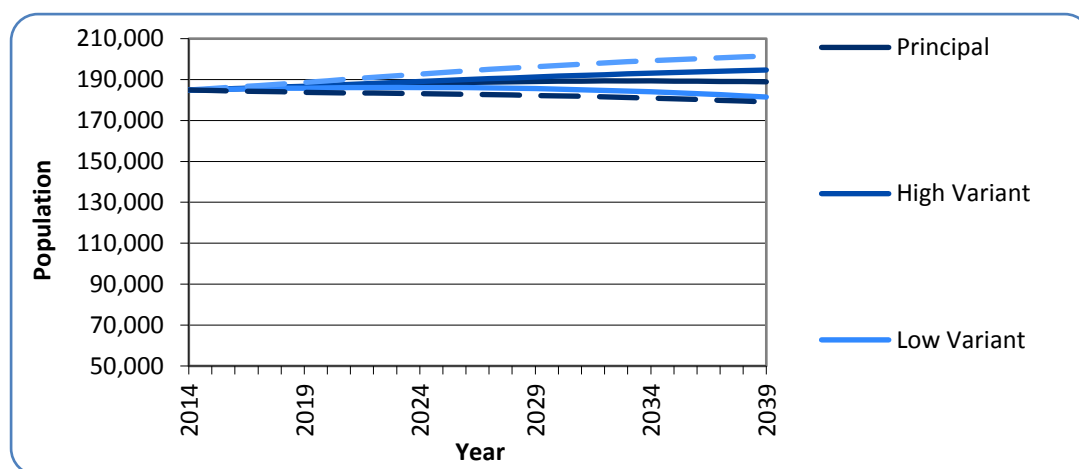
Table 2.2: Population change, Carmarthenshire, 2012-2015

Age group	2012	2015	% change 2012-2015
Age 2 and under	6,195	5,632	-9.0%
3 and 4	4,142	4,305	3.9%
5 to 7	6,158	6,388	3.7%
8 to 10	5,820	6,271	7.7%
11 to 14	8,375	8,008	-4.3%
0 to 14	30,690	30,604	-0.3%
All ages	184,317	185,123	0.4%

Source: ONS Crown Copyright Reserved [Nomis]

The County's population is predicted to increase steadily over a 25 year period. The rise in the number of children aged **0 to 15 years** old suggests an increased demand for childcare. Fig 2.2 below shows the projected total population by variant for Carmarthenshire is increasing. This is based on mid-year population estimates for 2016 based on data from the 2011 Census. This suggests an increased demand in childcare.

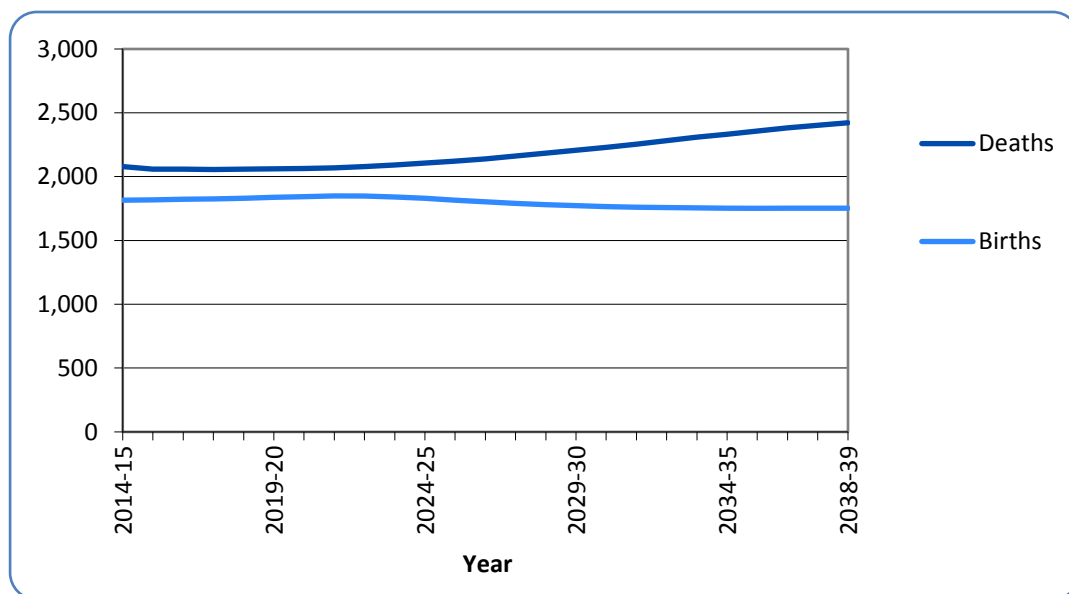
Fig 2.2: Projected Total Population by Variant, Carmarthenshire



Source: Statistical Directorate, Welsh Assembly Government

Fig 2.3 below shows that in Carmarthenshire the death rate is higher than the birth rate and the projected birth rate is likely to decrease from 2020, whilst the death rate is likely to increase. This suggests that there will be an aging population in the County.

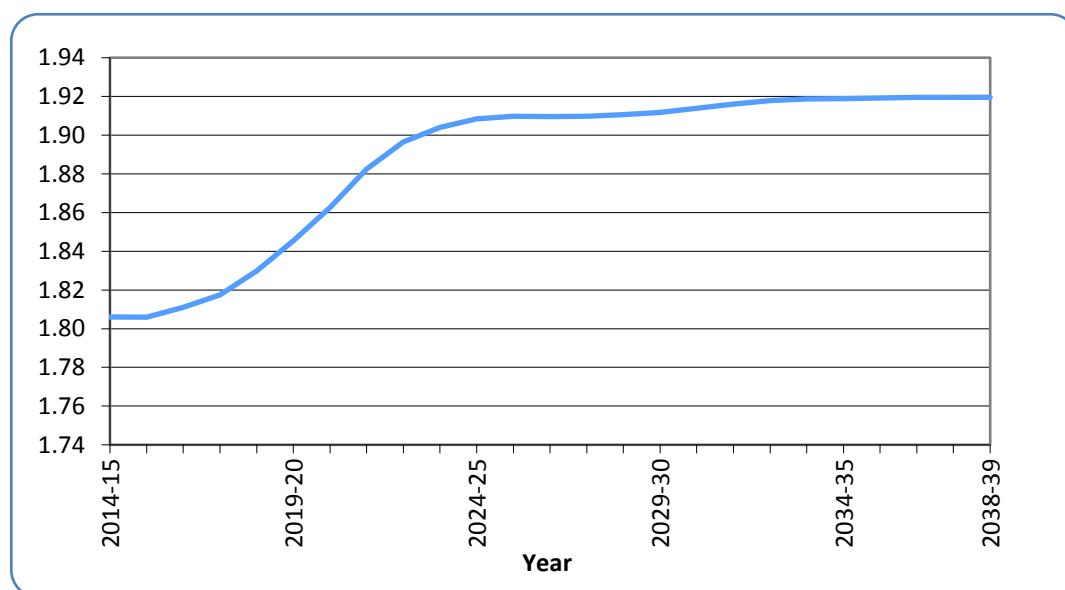
Fig 2.3: Projected Births and Deaths, Principal Projection, Carmarthenshire



Source: Statistical Directorate, Welsh Assembly Government

The projected General Fertility Rate (GFR) per 10,000 females aged 15-44 for Carmarthenshire is noticeably increasing. Fig 2.4 below shows the fertility rate increasing from 2016-17 onwards. This suggests there will be an increased demand for childcare.

Fig 2.4: Projected Total Fertility Rate (TFR), Principal Projection, Carmarthenshire



Source: Statistical Directorate, Welsh Assembly Government

Data is available on the number of international migrants entering the County by the number of National Insurance registrations (NI No). This provides a broad indication of the level of overseas nationals entering Carmarthenshire to work. Over the period 2009 to 2011 the number of international migrants decreased and fewer numbers were settling in the County. However since 2011 the number of migrant NI No registrations has steadily increased. There were **618** migrant NI No registrations in 2016 with over half coming from European countries within the EU. The single largest group of migrants were arriving from Poland. The majority of migrant workers tend to be short term – less than a year – and are generally engaged in food processing activities and household recycling centres. These workers are predominantly male and do not tend to require childcare.

3. DEMAND FOR CHILDCARE

Many factors combine to determine the demand for childcare. The ability to pay for childcare is related to a range of factors including employment status and household income; household nature and type; the age and number of children and the supply and cost of suitable accessible childcare.

Fig: 3.1 Childcare Demand

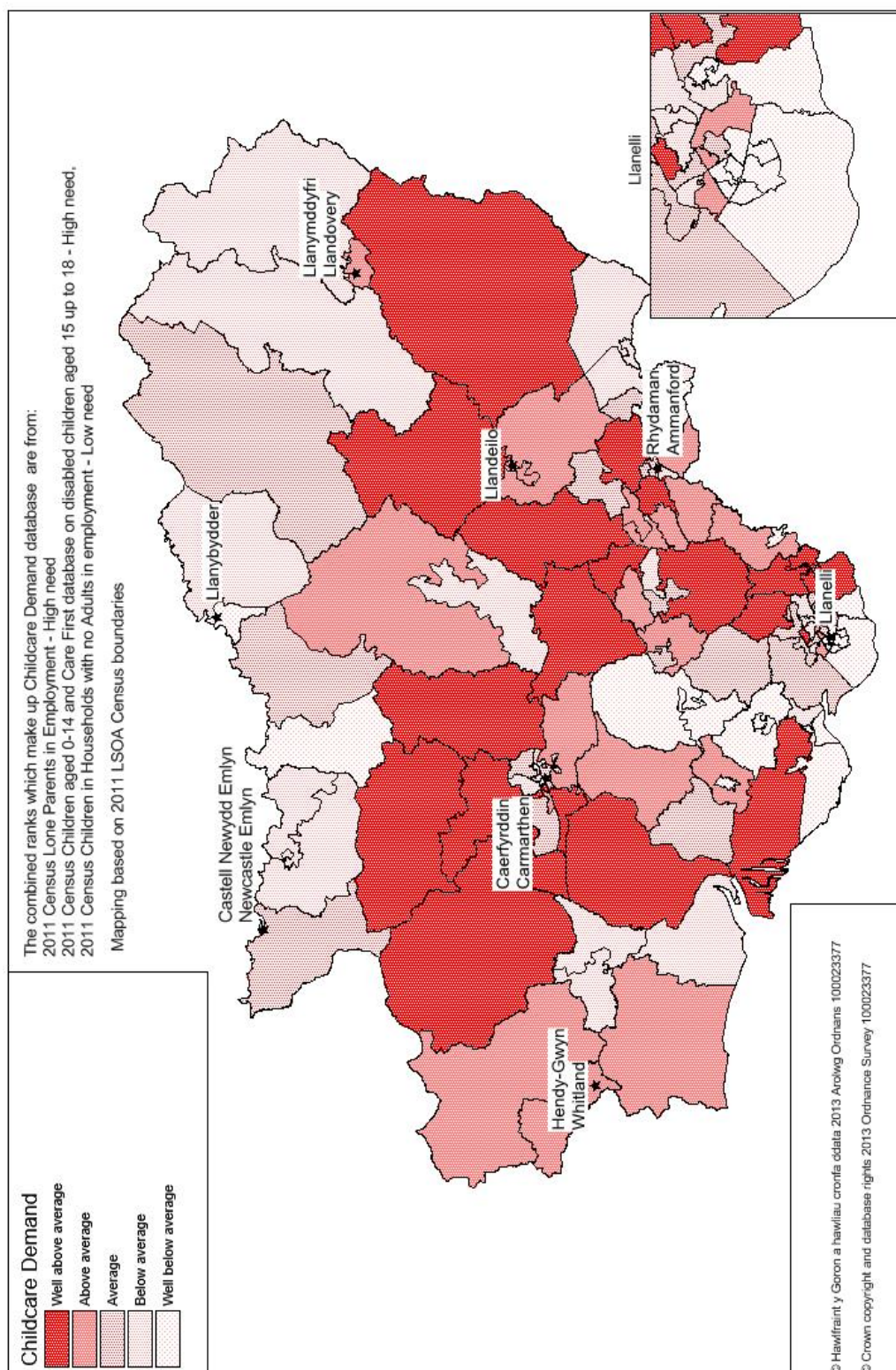


Fig: 3.1 (above) maps an Index of Childcare Demand. It was constructed by combining a range of indicators of demand for childcare, from the 2011 Census data; child population 0-14 (to 17 disabled); number of children in workless households; number of lone parents in employment. Areas classified as 'well above' average and 'above' average can be regarded as having a 'high' demand for childcare, with remaining areas having a 'low' demand. The areas of 'high' demand are where it might be expected that market forces will operate to provide childcare places. Intervention is more likely to be needed in areas of 'low' demand.

As Fig 3.1 shows, the main areas well above and above average demand for childcare are mainly concentrated in Community areas **1, 2 and 5**.

Analysis of the Parent/Carer questionnaire findings indicated that **67%** of the **1,235** respondents used registered childcare for some or all of their children.

33% of respondents didn't use any form of childcare. In comparison with the 2013 findings, the percentage of parents/carers using registered childcare has decreased from **73%** to **67%**.

Analysis of the Parent/Carer questionnaire findings indicated that the main reason for using childcare was to enable parents to work, recorded by **93%** of respondents.

Cost was the most important factor identified by those parents/carers not using childcare (**27.8%**).

Family and friends provided informal childcare for those **33%** of parent/carers who were not using registered childcare. Our consultation carried out with **102** grandparents within the County highlighted the growing role grandparents are playing in providing informal childcare for families locally, **90%** of which were providing childcare on a regular basis. **41%** stated they looked after their grandchildren once or twice a week, whilst **33%** were providing childcare for 3 or 5 days a week. The vast majority of grandparents who responded to our Survey (**89%**) stated they frequently got asked to look after grandchildren at particular times of need/crisis e.g. when grandchildren were ill unexpectedly, to cover ad hoc school INSET days or when other childcare arrangements broke down. Many grandparents reported finding it difficult to say 'no' to looking after their grandchildren, and provided childcare around their other work and caring responsibilities. **43%** stated they were providing more childcare this year compared with last year.

24% of parents/carers reported difficulties with childcare arrangements that break down at short notice or are unreliable.

There were **78,300** people employed within Carmarthenshire according to 2012 data. **81** employers responded to our Employer Survey. The Survey captured **31,548** of these employees and therefore represents **40%** of employees who work in the County.

All 81 employers who took part in our Employer survey stated that they had some form of flexible working arrangement(s) in place. The most common was for flexible hours which were provided by **65%** of employers, followed by reduced hours or home working (**42%**). These figures have increased since our last CSA which suggests that employers are offering more flexibility than they were three years ago.

Employers were asked if the availability of childcare had had an impact on attendance or working patterns. **41%** of employers felt this to be the case with children falling ill and school holidays presenting the largest problems. This figure has increased significantly in comparison with our 2013 data when only **22.6%** felt this to be the case.

4. SUPPLY OF CHILDCARE

Carmarthenshire residents generally use childcare provision based in the County. Registered childcare is provided in Carmarthenshire by childminders, day nurseries, sessional care and out of school care settings. In October 2016 there were **242** childcare providers in Carmarthenshire registered with the Care and Social Services Inspectorate Wales (CSSIW). Of these **242** registered providers, **113** were childminders; **35** were day nurseries; **52** were sessional care settings and the remaining **42** were out of school care settings. These providers offered a total of **4,165** registered childcare places. The number of registered childcare providers and places available within the county has increased since our last CSA in 2013 (previously **236** registered childcare providers and **4,048** registered childcare places). This is largely due to an increase in the number of new childminders and day nurseries.

Welsh medium childcare providers and places

The following tables show that between 2014 and 2016 there has been an increase in the number of childcare providers offering Welsh medium childcare places throughout the County.

2013-14

Table 4.1: Registered childcare providers and childcare places available by setting type, 2013-14

Setting type	Registered providers	Registered places
Childminders	102 (29)	541 (160)
Full day care	30 (10)	1,095 (385)
Sessional care	63 (54)	1,222 (1,076)
Out of school care	41 (23)	1,190 (625)
Total	236 (116)	4,048 (2,246)

2016-17

Table 4.2: Registered childcare providers and childcare places available by setting type, 2016-17

Setting type	Registered providers	Registered places
Childminders	113 (55)	735 (295)
Full day care	35 (17)	1,314 (630)
Sessional care	52 (51)	955 (935)
Out of school care	42 (24)	1,161 (653)
Total	242 (147)	4,165 (2,513)

(The figures above in red denote existing Welsh Medium childcare providers and childcare places by setting type i.e. in 2013-14, 29 out of the total 102 childminders within the County were able to provide 160 Welsh medium childcare places.)

In 2016, Carmarthenshire had **14** registered childcare places for every **100** children aged 0-14 years old.

The number of registered settings provides only a partial picture of childcare in the County. Some settings do not require registration, and these include for example settings that offer services for children aged over 12 years of age, services which operate under two hours and services which are exempt from registration.

Childminders

In October 2016 there were **113** registered childminders in Carmarthenshire providing **735** registered childcare places. This shows a growth in registered places since 2013 of **26%** when there were **102** childminders in the County offering **541** registered childcare places. Childminders provide **17.6%** of all registered childcare places within the county. Out of the 113 childminders, **90** currently offer a school pick up and drop off service. This is the same as in October 2013. Almost half of all childminders (**47%**) open before 7.30 am which represents an increase of **24%** in comparison to 2013. **21%** of childminders open after 6pm, representing an increase of **6%** since 2013. **8** childminders now operate on Saturday and **3** operate on both Saturday and Sunday. Opening times have therefore extended greatly since 2013 offering parents who work atypical hours and shifts more flexibility. Almost half of all childminders (**45.1%**) charge between **£3.50 and £4.50** per hour.

Day nurseries

Between October 2013 and October 2016 the number of registered day nurseries in the County increased from **30** to **35**. Likewise the total number of registered childcare places has increased from **1,095** to **1,314**. Day nurseries provide **31.5%** of all registered childcare places within the county. This provision is distributed widely throughout Carmarthenshire. Every community area now has at least two day nurseries, although the greatest level of provision is in the more urbanised areas of Carmarthen and Llanelli. In October 2016, **29** of the 35 day nurseries provided a school pick up and drop off service. This is an increase of 7 day nurseries offering this service since our last Assessment in 2013. There has been an increase in the number of day nurseries opening earlier (before 7.30am) and closing later (after 6 pm). We now also have **2** day nurseries who will open on a Saturday upon request. The highest costs for day nurseries continue to be in the Aman and Llanelli areas. These are areas where earnings tend to be relatively low. In October 2016, the vast majority of day nurseries (**74%**) charged between **£35 and £40** per day. Costs have increased since 2013. This is unsurprising due to rising utility, food and rent costs. The most expensive day nursery charges **£41** per day. **83%** of day nurseries provide a Welsh or mostly Welsh service. This represents a **10.3 %** increase since our last CSA in 2013.

Sessional care

There has been a reduction in the number of registered sessional care settings and registered places available within the County since our last CSA. In 2013 there were **63** registered sessional care settings and **1,222** registered childcare places. In October 2016 this had fallen to **52** registered sessional care settings and **955** registered childcare places. This represents a loss of **11** registered settings and **267** registered childcare places. Sessional care settings cater mainly for children aged 4 and under. Sessional care settings provide **23%** of all registered childcare places within the county. They are generally open during term time, with the majority open for 39 weeks of the year. The majority of settings operate either 3, 4 or 5 mornings per week, dependent on demand. Due to limited opening hours (under four hours) and frequency of opening, sessional care settings have a limited role in providing childcare for parents who are working. The average cost per session is **£6.63**.

Out of school care

In October 2016, there were **42** registered out of school care settings offering **1,161** registered childcare places. The number of registered out of school care settings has increased by **1** registered setting since our last CSA in 2013. There has been a marginal reduction in the number of registered childcare places from **1,190** to **1,161** (loss of 29 places). Out of school care settings provide **27.9%** of all registered childcare places within the county. It is difficult to calculate the precise number of out of school places

that are available in the County. Registered settings provide only a partial picture, and one that can be difficult to interpret because a single registration can contain three elements- before school care, after school care and holiday care. Some of the day nurseries also provide a combination of out of school facilities. The average cost per session, per child is **£5.04** and the maximum cost is **£7.62**.

During Summer 2016 a total of **22** registered Play Schemes offered Summer holiday childcare provision across Carmarthenshire. Out of the 22 Play Schemes which ran, **10** operated for the full 6 weeks, the remaining **12** Play schemes operated for between 2 and 3 weeks of the holidays. Costs varied from **£10 to £18** per child per day.

Breakfast Provision

In April–July 2016, **96 of the 100** nursery, infant and primary schools across Carmarthenshire took part in the Free Breakfast club initiative. (An additional new school is due to offer this provision shortly which will take the total up to **97** schools.) The majority of free breakfast clubs open at 8.15 am and provide an invaluable service for working parents. The average take up across all schools between April and July 2016 was **38%**, and the average daily eating across all schools was **50**. There is currently only one school in the county which does not offer any kind of breakfast club provision and this is due to lack of demand. The remaining two schools offer independently run breakfast/care provision which parents are required to pay for.

Early Years Foundation Phase (3 year olds)

All children in Wales are entitled to free, part time, quality Early Years Foundation Phase learning provision in an *approved early years setting* from the beginning of the **term after their third birthday** and prior to gaining full time entry into school. Part-time is defined as **a minimum of ten hours per week** for around the same number of weeks as the normal school year, and can be delivered as either **4 or 5 morning or 4 or 5 afternoon sessions or a mixture of 4 or 5 morning/ afternoon sessions**. An *approved setting* can be either a ‘maintained’ setting, which is a nursery class in a school, or a ‘non-maintained’ setting, which could be a playgroup or a private day nursery.

As at Summer Term 2016 a total of **915** children were accessing their full/partial ten hours early years education entitlement, the term after their third birthday in **38** maintained and **42** non-maintained settings within the County. Maintained settings are inspected regularly by Estyn. Non–maintained settings are subject to both Estyn and CSSIW inspections and are supported by Local Authority Link Teachers in order to ensure high quality provision is being delivered. A review of Early Years provision and practice within Carmarthenshire’s infant and primary schools has recently been undertaken by the Department for Education and Children. The Review identified a

range of different delivery models and inconsistencies across schools in applying the County Council's Admissions Policy. Some schools within the County have been admitting 3 year olds on a full time basis, others part time for 1 term then full time, and others part time for two terms until the child's fourth birthday. It also highlighted a number of gaps in provision for some three year olds within the County who are currently not able to access their ten hour entitlement. As a consequence of implementing a more stringent and consistent Admissions/Early Years Education provision policy i.e. all 3 year olds part time for 2 terms prior to full time the term before their 4th birthday, some working parents are going to require '**wrap around**' **care** in order to balance their working/caring commitments. This was confirmed by parents who had three year olds and completed our parent/carer questionnaires. Various options are currently being considered and will need to be progressed during the next five years.

Enhanced Childcare Offer (3 and 4 year olds)

The Welsh Government has committed within this Assembly term, to offer **30 hours free early education and childcare** for working parents of **3 and 4 year olds** for **48** weeks of the year (parents must be working a minimum of 16 hours each at National Minimum/Living wage and earn up to 100k). On Tuesday 8th November 2016, Carl Sargeant, Cabinet Secretary for Communities and Children announced the **6** early adopter Local Authorities who will pilot the first phase rollout of this offer: **Rhondda Cynon Taf, Blaenau Gwent, Swansea, Flintshire, Gwynedd and Anglesey**. The Welsh Government is referring to this ambition as '*the most generous childcare offer anywhere in the UK*'. There are a wide range of practical issues likely to arise as a result of moves to substantially increase levels of childcare provision. There will be a need for more physical space from which to deliver the provision. More suitably qualified childcare staff will also be needed, with a workforce able to deliver the entitlement both in English and Welsh. The capacity of local authority school settings along with that of the private and voluntary sector to support the delivery of the increased offer is likely to be key to how this new childcare offer will be developed in the future. The Cabinet Secretary for Communities and Children has already confirmed that a 10 year Early Years, Childcare and Workforce Plan will be published in 'Spring 2017'. Providing this entitlement during School holiday periods is likely to be problematic. There are still many questions to be resolved and lessons will need to be learnt from the 6 Local Authorities that are piloting different models. At the time of producing this Report it is currently unknown as to when Carmarthenshire will be expected to deliver the enhanced childcare offer. It is currently anticipated that all 3 and 4 year olds will be able to access their entitlement by **2020**. Early discussions have commenced within the Local Authority to begin planning how this could be delivered. Lead Officers from Carmarthenshire County Council with responsibility for Childcare and Foundation

Phase education are members of the Childcare Offer Advisory group and will be closely involved in the roll out of the first phase and subsequent phases of this Offer.

Flying Start Childcare

The Flying Start programme in Carmarthenshire is a Welsh Government initiative offering families with children aged 0-3 years targeted early intervention services. Due to the nature of it being a targeted programme, strict postcode eligibility applies. Set up in 2007, eight original communities were identified using uptake for free school meals and other poverty indicators, to evidence areas of deprivation, which were: **Bigyn, Betws, Carway, Felinfoel, Morfa, Lakefield/Copperworks, Llwynhendy and Richmond Park**. In 2012/13 Welsh Government announced an expansion of the service and Carmarthenshire identified a further 9 new communities which were to benefit from Flying Start intensive support services, which were: **Dafen (Llanelli), Pantyffynon, Garnant, Glanaman (Ammanford), Carmarthen Town North, Pwll (Llanelli), Trimsaran (Kidwelly), Burry Port, and Pembrey**. Services are delivered under four service areas; intensive health visiting on a needs led basis, funded childcare places for 2-3 year olds, early language activities and a range of parenting programmes, offering support on behaviour management and positive parenting.

The provision of good quality childcare for children from 2-3 years of age is the centre-piece of the programme and as it focuses on children living in disadvantaged communities, it aims to offer stimulating opportunities to improve their long term outcomes in preparation for school. The Flying Start Childcare entitlement is for 2.5 hours care per day, for five days per week. A total of 12.5 hours per week and for up to 42 weeks of the year. Flying Start Childcare settings provide childcare places to all eligible parents with 2-3 year old children living within designated Flying Start expansion postcode areas, from the term after second birthday to the term in which they turn three years old. The focus of the service is on the child and in particular to ensure that all children develop their language, social skills, emotionally, physically in order to be ready to begin school. Flying Start Carmarthenshire currently has contracts with childcare settings across the county currently, ranging from Private Day Nurseries, Family Centres, Welsh Medium Cylch Meithrin and bi-lingual Sessional Playgroups. As at 31st December 2016, Flying Start purchased **412** childcare places and **331** children were benefitting from free childcare providing a take up rate of **80.3%** via this programme.

5. CHILDCARE BARRIERS AND GAPS IDENTIFIED WITHIN CHILDCARE PROVISION

The full Childcare Sufficiency Assessment Report uses a range of data collected as part of the Assessment process to identify gaps in the childcare market experienced by different categories of parents/carers in Carmarthenshire. The Report seeks to quantify the scale and extent of the childcare gaps with the aim of helping the Local Authority prioritise which gaps to address as part of their Childcare Sufficiency Action Plan (the CSA Action Plan is produced as a separate document). The CSA Action Plan will be monitored and reviewed at mid and end of year intervals, and updated on an annual basis to ensure it is 'fit for purpose' and resources are targeted where they are needed the most.

The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016 require all Local Authorities to consider:

a) the accessibility of childcare provision

b) the barriers experienced by –

(i) working parents

(ii) parents seeking work or training opportunities

(iii) unemployed households

(iv) low income families

(v) lone parent families

(vi) families from ethnic minority backgrounds

(vii) families with children who have special educational needs or a disability

a) the accessibility of childcare provision

Location of childcare is an important factor for parents/carers within Carmarthenshire and is likely to be connected with issues of transport and travel.

It was noted earlier that Carmarthenshire is predominately rural, so population sparsity and geographical isolation can have important implications for childcare provision. The population density of the County was **78** people per sq km in 2011. Just over half (53%) of the population of Carmarthenshire live in 'sparse' or 'super sparse' areas. One of the domains in the Welsh Index of Multiple Deprivation (WIMD): Child Index 2011 is a Geographical Access to Services Deprivation Domain. This combines a number of indicators relating to access to primary schools, public libraries, leisure centres and secondary schools. The index shows the most accessible areas are concentrated in Llanelli and Aman areas and in Carmarthen town (Community areas **1, 3, 5 and 6**).

The tables below show the number of registered childcare providers available within each community area (1-6). (Due to limited opening hours (under two hours) and frequency of opening, sessional care settings have only a very limited role in providing childcare for parents who are working).

Table 5.1: Community Area 1

	Childminders	Day Nurseries	Out of School care	Total
Total	23	9	12	44

Table 5.2: Community Area 2

	Childminders	Day Nurseries	Out of School care	Total
Total	20	6	7	33

Table 5.3: Community Area 3

	Childminders	Day Nurseries	Out of School Care	Total
Total	18	2	6	26

Table 5.4: Community Area 4

	Childminders	Day Nurseries	Out of School Care	Total
Total	16	6	6	28

Table 5.5 Community Area 5

	Childminders	Day Nurseries	Out of School care	Total
Total	24	5	7	36

Table 5.6: Community Area 6

	Childminders	Day Nurseries	Out of School care	Total
Total	12	7	4	23

The tables above and other data collected as part of our full CSA Report have enabled us to identify the following:

Community area **1** has the highest number of registered childcare providers.

Community areas **6** has the lowest number of registered childcare providers.

Community area **2** has the highest median income (£25,722) and highest demand for childcare.

Community area **6** has the lowest median income (£20,996). Affordability is likely to be an issue for parents/carers in this area. There is limited registered out of school provision in Area 6.

Community area **5** has the highest number of 0-2 year olds, followed closely by Community area **6**. It is likely that there will be a high demand for full day care and childminders in these areas.

Community area **4** has the highest number of 11-14 year olds. It is likely that there will be a high demand for out of school provision in this area.

Community area **3** – Over half the population in this area are Welsh speakers, compared to **25% in community area 6**. Demand for Welsh medium childcare provision is likely to be higher in community area 3. Less demand for Welsh provision in community area 6.

Since our last CSA **5** new day nurseries have been set up in the County. Every Community area now has at least two day nurseries, some Community areas have as many as **9** day nurseries. Day nursery provision provides **31.5%** of registered childcare places within the County. This is an increase of **13.5%** since 2013.

Since our last CSA there has been growth in the number of registered childminders from **102 to 113** with a growth in registered places from **541 to 735** places (**26%** increase). All community areas have a minimum of 12 registered childminders.

Holiday provision is concentrated in only a few locations leaving large areas of the County without such provision. A significant number of parents/carers who took part in our Parent/carer Survey suggested the need for affordable holiday care for the **11+** age group during the summer holidays.

The Parent/Carer Survey revealed that only a small minority (**2.7%**) of those who do not use childcare were unable to find childcare in the right location.

Out of the parents/carers who stated that they use childcare, only **3.4%** of respondents reported that they had travel or transport problems preventing them from accessing childcare.

The vast majority of parents/carers felt that there was enough Welsh medium childcare available within the county and were able to access childcare in the language of their choice. There has as noted earlier, been an increase in the number of Welsh medium childcare providers since our last CSA in 2013 (see Section 4 - Supply of childcare).

Likewise the vast majority of parents/carers were satisfied with the quality of childcare provision available within the County.

b) the barriers experienced by –

- (i) working parents*
- (ii) parents seeking work or training opportunities*
- (iii) unemployed households*
- (iv) low income families*
- (v) lone parent families*
- (vi) families from ethnic minority backgrounds*
- (vii) families with children who have special educational needs or a disability*

(i) working parents

943 of the **1,235** parent/carers who took part in our Parent/Carer Survey used registered childcare in the County in order to enable them to work.

Cost was identified as a major barrier for a significant number of working parents (**79%**).

A significant number of working parents who took part in our Parent/carer Survey reported difficulties accessing after school provision for their children, with many schools operating long waiting lists. This would suggest that there is currently insufficient after school provision available within community areas **1 - 5**.

Likewise a large number of working parents highlighted inequitable 10 hours early years education provision for three year olds within the County, and the need to develop wrap around care to enable them to access their child's entitlement and balance their working/caring responsibilities. Many parents/carers were foregoing their entitlement as they simply could not manage the pick-up and care for the remaining part of the day.

There has been a significant increase in the number of working parents/carers requiring childcare after 6pm and during weekends in comparison to the previous survey carried out with Parents/Carers in 2013.

Working parents/carers within the county appear to be more satisfied with their term time childcare arrangements than their holiday childcare arrangements. **89%** of respondents were satisfied with their term time childcare arrangements, whilst only **61%** of respondents were satisfied with their holiday childcare arrangements.

Many working parents/carers reported difficulties finding suitable affordable holiday childcare for older children (**11+**) during the Summer period, particularly in the Llanelli area.

Data seems to suggest that there is a lack of full day care and childminders in Community areas **3, 4, 5 and 6**.

Many working parents/carers also highlighted the need for breakfast clubs to open earlier i.e. before 8.15 am in order to allow them sufficient time to drop off children and get to work on time. A small number of working parents/carers questioned why they had to pay for breakfast provision when the vast majority of schools operated a free breakfast club initiative.

(ii) parents seeking work or training opportunities

23% of parents/carers who took part in our Parent/carer survey felt that lack of suitable childcare was a barrier for accessing training and employment.

Reducing the cost of childcare was the most popular improvement suggestion given by parents/carers who use childcare and also from those who do not use childcare.

Many unemployed parents/carers noted that they were putting their careers on hold until their children were older as they would be paying out all of their wages to cover the cost of childcare and would be no better off financially.

(iii) unemployed households

There were **4,800** workless households with dependent children in Carmarthenshire in 2016.

123 of the 1,235 respondents to our Parent/Carer Survey were not in work, education or training.

Cost of childcare was raised as a significant barrier for unemployed households.

A small number of unemployed parents/carers also raised issues re inability to find suitable childcare to meet the needs of their children with specific disabilities/additional needs. Many of these parents had given up work to look after their children in order to take them to regular medical appointments.

(iv) low income families

Affordable childcare is a significant issue/barrier for low income families throughout Carmarthenshire.

Carmarthenshire's income levels are the **7th lowest** in Wales and there are significant disparities across the 6 community areas. The latest figures from CACI Paycheck 2016 show that the median income for Carmarthenshire is **£23,825**. The highest median income is **£25,722** in Community area **2 (Abergwili, Carmarthen Town West, Cilycwm, Cynwyl Elfed, Llandeilo, Llandovery etc)**.

36% of households across the County can be said to be living in poverty based on the Welsh Government definition of poverty as “households with less than 60% of the GB median income”, making Carmarthenshire levels the **8th highest** in Wales. In addition, measures of the Wales Index of Multiple Deprivation (WIMD) 2014 indicate significant variance in the level of deprivation experienced across community areas. Community area **6 (Bigyn, Elli, Glanymor, Hengoed, Lledi and Tyisha)** is the most deprived in Carmarthenshire featuring across all but two WIMD measures; namely housing and access to services. **43%** of households in Community area **6** are living in poverty.

299 of the 1,235 respondents to our Parent/Carer Survey earned below £20,000.

79% of the parents/carers who took part in our Parent/carers Survey reported that they considered childcare to be too expensive, and would like childcare to be made more affordable both during term time and school holidays.

52.7% of parents/carers who took part in our Survey received no financial help towards childcare costs.

33% of parents/carers who took part in our Parent/carers Survey reported that they didn't know where to go to find information on financial assistance available to them to help with childcare costs. A significant number of parents feared claiming working tax credits as they felt the process was too complicated and were scared they would end up re-paying money that they didn't have due to errors in overpayments etc.

Average hourly childcare fees/daily charges across all types of childcare provision have increased significantly since the last CSA in 2013. **74%** of day nurseries, charge between £35 and £40 per child/per day. The highest costs for day nurseries were reported in the Aman and Llanelli areas. These are the areas where earnings are generally lower and deprivation is higher.

A range of data collected as part of the Assessment process suggests that affordability continues to be a significant issue for parents/carers using full day care particularly in the Ammanford, Llanelli and Llandeilo areas.

(v) *lone parent families*

227 out of the 1,235 respondents to our Parent/Carer Survey were lone parents.

Cost was identified as a major barrier by lone parents who responded to our Parent/carers Survey with many lone parents having to rely on informal childcare provided by family and friends.

Lone parents required more childcare available between the hours of 7am and 8am and after 6pm.

Summer holiday provision appeared to a problem for many lone parents who responded to our Parent/carer Survey both in terms of finding suitable provision and affordability.

(vi) families from ethnic minority backgrounds

Around **185, 100** people currently live in Carmarthenshire making it the County with **the 4th highest** population in Wales. **76%** of the population of Carmarthenshire were born in Wales. Only a very small proportion (**1.9%**) are from non-white ethnic backgrounds.

71 out of 1,235 respondents who took part in our Parent/carer survey were from ethnic minority backgrounds.

Cost was identified as a barrier by ethnic minority parents/carers who completed our Parent/Carer survey.

Parents from ethnic minority backgrounds who responded to our Parent/carer survey identified the need for extended opening times as many of them were working shift patterns and found finding childcare to accommodate this problematic.

There was no mention of any language barriers by those ethnic minority parents who responded to our Parent/Carer survey, with many making use of Welsh medium childcare provision.

(viii) families with children who have special educational needs or a disability

Our Parent/Carer Survey captured the needs of **429** children and their families in the county with varying needs/disabilities.

Cost of childcare was identified as a significant barrier by parents of disabled children who responded to our Parent/carer Survey.

Lack of suitably qualified workers in settings to deal with disabled children's needs was also raised as a significant barrier by parents of disabled children who responded to our Parent/carer Survey.

Poor facilities at childcare settings, and lack of appropriate places were raised by parents of disabled children who responded to our Parent/carer Survey.

Parents of children with disabilities and additional needs who responded to our Parent/carer Survey also reported that they felt that there was a gap in provision for specialised childminders and summer holiday provision.

6. CONCLUSION

Analysis of various demographic and socio-economic data, and the introduction of new initiatives such as the Enhanced Childcare offer and changes to Benefits entitlements e.g. Introduction of tax free childcare and Universal Credit all appear to suggest an increased demand for registered childcare over the next five years.

Affordability continues to be a significant issue for nearly all parents within the county. All registered childcare providers have increased their fees since 2013 due to rising utility, food, premises costs etc.

Each year maintaining the number of registered childcare providers and places within the County is a challenge, as a number of providers de-register for various reasons beyond the control of the Local Authority. Over the last three years we have supported the sector by closely monitoring all registered settings using a Red/ Amber/ Green/ (RAG) Framework and providing support in partnership with our umbrella Childcare Organisations (Mudiad Meithrin, Wales Pre School Providers Association and Clybiau Plant Cymru Kids Clubs) to ensure that these settings remain sustainable. We have, and will continue to offer hardship and sustainability grants in order to maintain registered settings within the County.

Whilst it is hugely encouraging to report growth in the number of childcare providers and places within the county since our last CSA in 2013, there still appears to be insufficient **full day care, childminders** and **out of school care** within pockets of the County. It is essential that the Local Authority continues to support and maintain existing registered childcare provision within the county, and utilises Core and Out of School Childcare grant funding to develop provision in targeted areas of unmet need. A strong childcare market is critical to the success of a thriving local economy. We know that childcare means that parents can go out to work, take up training opportunities, increase their working hours and improve their job prospects. Our local economy therefore needs good quality childcare, and thus the success of the Child Poverty Agenda also depends on a thriving childcare market if we are to support families back into work, whilst at the same time ensuring children receive the best possible early education experiences.

7. RECOMMENDATIONS FOR SECURING SUFFICIENT CHILDCARE

This Report makes the following **39** recommendations to address current supply and demand childcare gaps across Carmarthenshire. Each recommendation has been allocated a high, medium or low priority status.

ROLE OF THE LOCAL AUTHORITY

Recommendation 1

Continue to champion the crucial role childcare plays in tackling poverty and inequality. Ensure that the benefits of childcare in terms of enabling parents to work, improving children's outcomes and narrowing the gap between disadvantaged children and their peers is fully understood and valued, and are integrated at a higher strategic level in Local Authority Strategies/Delivery Plans.

Priority Status = HIGH

Recommendation 2

Ensure that an Action Plan is developed to implement the recommendations set out in this Report, and that adequate resources are secured via Childcare RSG and the Out of School Childcare Grant to enable this. Review, monitor and update Action Plan annually in order to measure progress, and ensure changing childcare needs and priorities are addressed.

Priority Status = HIGH

Recommendation 3

Monitor the impact of the current economic climate on all local childcare providers and put mechanisms in place early on to ensure sustainability of provision. Continue using a Red/Amber/Green (RAG) rated support framework across all registered childcare settings i.e. Full day care, out of school care and sessional care to determine level of support required by each individual setting, to ensure that settings have best possible chance of remaining sustainable, and that any issues identified are raised early.

Priority Status = HIGH

Recommendation 4

Ensure that any investment in childcare support is across programmes/departments and is delivered in a coherent way to maximise the investment available, its fit with the wider strategic objectives and addresses local demand.

Priority Status = MEDIUM

CHILDCARE DEMAND

Recommendation 5

Continue to closely monitor enquiries from parents/carers via FIS in relation to childcare needs and assess the demand for childcare outside 8am – 6pm, weekends, holidays and atypical hours. Ensure that this information feeds in to the annual Childcare Sufficiency Assessment planning process.

Priority Status = MEDIUM

CHILDCARE SUPPLY

Recommendation 6

Continue to use Childcare Sufficiency Assessment as a reference tool for signposting all potential new childcare providers, after initial contact with the Local Authority/Family Information Service/Care and Social Services Inspectorate Wales.

Priority Status = MEDIUM

Recommendation 7

Continue to publicise areas of low childcare supply as business opportunities and actively promote these locally.

Priority Status = HIGH

Recommendation 8

Continue to offer start up grants to new registered childcare providers who are wanting to set up in areas highlighted within the County where there is deemed to be lack of childcare supply.

Priority Status = HIGH

FULL DAY CARE

DAY NURSERIES

Recommendation 9

Continue to support and maintain existing day nurseries in the County.

Priority Status = HIGH

CHILDMINDERS

Recommendation 10

Continue to support and maintain existing childminders in the County.

Priority Status = HIGH

Recommendation 11

Promote and publicise childminding as a career opportunity in order to recruit additional new childminders in targeted areas of current unmet need.

Priority Status = HIGH

Recommendation 12

Continue to fund CYPOP5 training and Quality Start Packs for new childminders. Priority to be given to areas where there is currently unmet demand (as above).

Priority Status = HIGH

Recommendation 13

Continue to encourage existing and new childminders to be flexible in their opening hours (including weekends) and consider offering a pick up and drop off service (if not already doing so).

Priority Status = HIGH

Recommendation 14

Continue to monitor the turnover of registered childminders (via Family Information Service and Care and Social Services Inspectorate Wales data) and reasons why they are de-registering. Ensure that the gaps that result from de-registrations are fed in to the CSA annual planning process.

Priority Status = HIGH

OUT OF SCHOOL CARE**Recommendation 15**

Continue to support and maintain existing out of school clubs.

Priority Status = HIGH

Recommendation 16

Explore the barriers preventing unregistered out of school clubs from becoming registered. Offer appropriate support to these settings to remove these barriers.

Priority Status = HIGH

Recommendation 17

Work closely with after school clubs that have current waiting lists to see if expansion would be viable. Offer funding and support where this is possible. Where this is not possible ensure that after school clubs are sign posting parents to the Family Information Service in order to see what alternative provision is available locally.

Priority Status = HIGH

BREAKFAST CLUBS AND FREE BREAKFAST INITIATIVE**Recommendation 18**

Continue to encourage take up of free breakfast club provision across the County.

Priority Status = HIGH

SESSIONAL CARE**Recommendation 19**

Continue to maintain and support existing sessional care settings.

Priority Status = MEDIUM

HOLIDAY CARE**Recommendation 20**

Continue to maintain and support existing holiday clubs and play schemes.

Priority Status = HIGH

Recommendation 21

Encourage schools which already run after school clubs to offer holiday provision if they are not already doing so.

Priority Status = HIGH

Recommendation 22

Encourage existing holiday clubs and play schemes to consider extending their opening periods to cover ad hoc INSET days and all school holidays (not just summer) including Half Term periods, Christmas and Easter.

Priority Status = HIGH

Recommendation 23

Explore the viability of developing affordable summer holiday provision for secondary aged school children in Llanelli area.

Priority Status: MEDIUM

Recommendation 24

Continue to offer activity grants to summer play schemes in order to enable them to offer high quality learning activities to meet the needs of the children attending this provision.

Priority Status = MEDIUM

WRAP AROUND CARE**Recommendation 25**

Continue to promote the take up of free 10 hours early education provision for all 3 year olds the term after their third birthday, part - time, for two terms, in line with the Local Authority's Early Years Position Statement and Admissions Policy. Work in partnership with schools to develop appropriate 'wrap around' care for working parents in order to enable them to be able to access their entitlement, and balance their working/caring responsibilities.

Priority Status = HIGH

ENHANCED CHILDCARE OFFER- 30 HOURS FOR 3 AND 4 YEAR OLDS**Recommendation 26**

Begin planning how the Local Authority will deliver the Welsh Government's enhanced childcare offer of 30 hours free early education and childcare for working parents of 3 and 4 year olds for 48 weeks of the year. (Early Adopter pilot authorities will trial the enhanced offer from September 2017. Continued phased roll out is anticipated post 2017.)

Priority Status = HIGH

AVAILABILITY/FLEXIBILITY**Recommendation 27**

Consider offering support and assistance to persons interested in becoming registered nannies in order to offer parents/carers within the County flexible childcare which can accommodate atypical working hours.

Priority Status = MEDIUM

AFFORDABILITY**Recommendation 28**

Family Information Service to continue to ensure that parents/carers have access to the correct information about childcare options, the financial help available to them and the benefits they are entitled to.

Priority Status = MEDIUM

Recommendation 29

Continue to provide shortfall funding to Summer Play Schemes in the Aman and Llanelli areas where childcare costs appear to be the highest and earnings are lowest, in order to keep daily charges affordable for parents/carers in these areas.

Priority Status = MEDIUM

ACCESSIBILITY**Recommendation 30**

Continue to encourage parents/carers living in Flying Start post code areas to access their 12.5 hours (per week) free childcare for 2-3 year olds.

Priority Status: HIGH

SUSTAINABILITY**Recommendation 31**

Continue to offer sustainability/hardship grants to registered childcare providers who are struggling to sustain their businesses.

Priority Status = HIGH

INFORMATION**Recommendation 32**

Continue to promote and publicise the Family Information Service to parents, carers, schools, employers and professionals across Carmarthenshire to ensure that families are able to access information in a range of different formats to enable them to access appropriate services.

Priority Status = MEDIUM

Recommendation 33

Family Information Service to continue to signpost economically inactive parents to Parents Accessing Childcare and employment (PaCE) and Communities 4 Work projects in order to access individual advice and support to increase their employment prospects.

Priority Status = MEDIUM

CHILDREN WHO HAVE SPECIAL EDUCATIONAL NEEDS OR A DISABILITY**Recommendation 34**

Continue to support and fund summer play scheme sessions for children with disabilities.

Priority Status = MEDIUM

Recommendation 35

Continue to improve the range of information provided by the Family Information Service for parents of disabled children in order to assist them in making informed decisions about the most appropriate childcare to meet the needs of their child/ren.

Priority Status = MEDIUM

Recommendation 36

Ensure that funding is available for registered childcare providers to purchase specialist resources/training to cater for children with additional needs.

Priority Status = MEDIUM

WORKFORCE DEVELOPMENT AND CONTINUING PROFESSIONAL DEVELOPMENT/ QUALITY**Recommendation 37**

Ensure that the local childcare workforce continue to have access to subsidised mandatory training courses (including Food Safety, Child Protection and Safeguarding and Paediatric First Aid) to fulfil CSSIW requirements, and further enhance continuing professional development opportunities.

Priority Status = HIGH

Recommendation 38

Continue to provide opportunities for the local childcare workforce to develop skills to work in Welsh medium and bilingual childcare settings and provide Welsh language opportunities for children in English medium childcare settings.

Priority Status = MEDIUM

Recommendation 39

Continue to improve the qualification levels of staff working in local childcare settings in order to further raise standards and quality, and ensure children are being given the best possible learning experiences. Promote '*Progress for Success*' work based learning upskilling opportunities, and encourage and monitor take up of places.

Priority Status = MEDIUM