

**Childcare Sufficiency Assessment 2011
Consultation with Providers**

February / March 2010

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Introduction

Background

Under the duties in the Childcare Act 2006, local authorities have a duty to support the development of childcare provision in their local area. This needs to be flexible, sustainable and responsive to the needs of the local community. In order to ensure this happens local authorities have a duty to undertake a detailed assessment of the supply of, and demand for, childcare in their area. This includes consulting with parents, employers, community groups and providers of childcare.

Aim

To consult with providers and find out their views on the sufficiency of childcare in their area. Areas to look at are:

- Types of childcare required
- Times childcare is required
- Age of child
- Disabilities
- Affordability of childcare
- Quality of childcare
- Impact of the recession over the last year
- Future plans for the next year
- Impact of national and local changes on childcare providers

Methodology

In order to consult with childcare providers across Devon 2 methods were chosen to ensure a wide variety of childcare providers were captured.

Method 1 – Quantitative – February / March 2010

A questionnaire (see appendix 1) was sent out to all Schools, Children's Centres and Early Years Settings along with a freepost envelope to return the questionnaire to ensure a better response rate. Early Years Settings were asked Questions 1-3. Schools and Children's Centres were only asked Question 1.

Method 2 – Qualitative – February / March 2010

In order to capture more providers and gain some qualitative data, it was decided to consult with providers at the combined Network and OUTs meetings that took place across the county. These are traditionally well-attended as they are used to disseminate essential information to providers. 14 sessions were organised at the following towns:

- Ashburton
- Axminster
- Barnstaple
- Exeter (3 sessions – Central, Pinhoe, Redhills)
- Exmouth
- Holsworthy
- Honiton
- Ivybridge

- Okehampton
- Teignmouth
- Tiverton
- Torrington

These sessions were held at various times, daytime and evening, and in various locations covering the whole of Devon to ensure that all types of providers can attend.

The local District Co-ordinator for the area facilitated the discussions and encouraged feedback. (See Appendix 2 for District Co-ordinator notes).

Question 1: This asked them to think about whether they thought there was enough childcare in their area and if not what was missing. For this question the providers were split into small groups according to their learning community to discuss their area and wrote their comments on a piece of flipchart paper.

Question 2: This was individual responses about the past year and the future year. For this, providers were given an individual response sheet that was collected at the end of the session.

Question 3: This asked them about the impact of local and national changes to their businesses. For this large pieces of paper were stuck up around the room and providers were asked to put comments on post-it notes and attach it to paper under the relevant heading.

The comments and feedback sheets were collected at the end of the session by the DC's and returned to be transcribed for analysis.

Profile of Respondents

A total of 926 providers were consulted throughout the process including Childminders, Children’s Centres, Crèches, Day Nurseries, Maintained Nurseries, Nursery Units of Independent Schools, Out of School settings, Pre-school Playgroups and Schools. 484 providers were consulted through the combined network and OUTs sessions and 442 providers returned the questionnaire.

Table 1 – Providers Consulted by type

Type of Provider	Qualitative	Quantitative	Total
Childminder	146	130	276
Children's Centre	3	12	15
Crèche	2		2
Day Nursery	81	37	118
Maintained	1	4	5
Nursery Units of Independent School	5	1	6
OOS	33	28	61
Pre-school Playgroup	209	91	300
Private Nursery School	4	4	8
School		128	128
Unknown		7	7
Total Providers	484	442	926

Of these, there was a good spread of providers from across the county from different learning communities.

Table 2 – Providers consulted by Learning Community

Learning Community	Qualitative	Quantitative	Total
Axe Valley	32	14	46
Barnstaple	19	23	42
Beacon	24	16	40
Bideford	27	22	49
Braunton	15	5	20
Central & Chestnut	37	13	50
Chulmleigh	9	10	19
Clyst Vale	19	6	25
Crediton	8	22	30
Culm Valley	11	21	32
Dartmouth	4	8	12
Dawlish	13	16	29
Exmouth	36	19	55
Holsworthy	0	4	4
Honiton	30	12	42
Ilfracombe	17	10	27
Ivybridge	30	24	54
Kingsbridge	12	20	32
Newton Abbot	19	24	43
Okehampton	0	16	16
Ottery St Mary	16	7	23
Sidmouth	12	8	20
South Dartmoor	18	19	37
South Molton	4	11	15
Tavistock	3	21	24
Teign Valley	6	8	14
Teignmouth	8	11	19
Tiverton	13	14	27
Torrington	5	8	13
Totnes	13	16	29
West Exe	20	8	28
Outside Devon	0	1	1
Unknown	0	5	5

Data Analysis

The Quantitative data from the questionnaire was input into a spreadsheet for analysis using tables and charts.

For the purposes of data analysis Maintained Nurseries, Nursery Units of Independent Schools and Private Nursery schools have been combined with Day Nurseries due to low numbers and will now be referred to as Nurseries.

Table 3 – Nurseries

	Qualitative	Quantitative	Total
Nurseries	91	46	137

The Qualitative data including open questions from the questionnaire and the responses from the discussion groups has been transcribed word-for word directly from providers' comments and post-it notes. However they have been slightly edited for inclusion in this document, whilst ensuring that the meaning of the response is preserved. It was also necessary to generalise and group comments together according to their theme in order to further analyse the data.

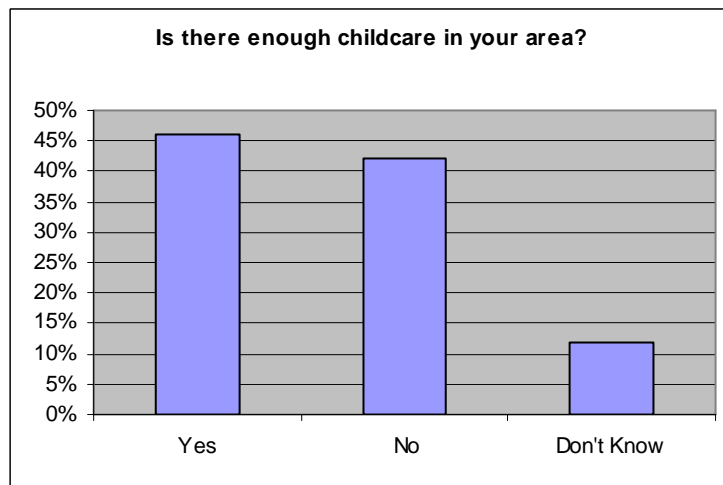
Sufficiency of Childcare

Thinking about right now – do you think there is enough childcare in your area? If not, what’s missing and why?

Question 1: Is there enough Childcare in your area?

Providers’ views on the sufficiency of childcare were divided. Overall, 45% (200) providers reported that they thought there was enough childcare in their area. Equally 42% (183) providers thought that there was not enough childcare in their area and 12% (51) were unsure. There is only a small percentage difference between those that thought there was enough childcare in their area and those that said there was not.

Chart 1- Is there enough childcare in your area?



There was a wide variation in the providers views of sufficiency related to their location by learning community.

In 10 Learning communities across Devon more than 50% of the providers reported that there was enough childcare in their area. In 2 learning communities 75% or more of childcare providers said there was enough childcare in their area. These were Barnstaple and Newton Abbot.

Table 4 – Is there enough childcare in your area by learning community?

Is there enough childcare in your area?	Don't Know		No		Yes	
	Count	Percentage	Count	Percentage	Count	Percentage
Axe Valley	4	31%	6	46%	3	23%
Barnstaple	0	0%	4	17%	19	83%
Beacon	4	25%	6	38%	6	38%
Bideford	3	14%	13	59%	6	27%
Braunton	0	0%	4	80%	1	20%
Central & Chestnut	1	8%	6	46%	6	46%
Chulmleigh	1	11%	4	44%	4	44%
Clyst Vale	1	20%	4	80%		0%
Crediton	2	9%	7	32%	13	59%
Culm Valley	5	24%	8	38%	8	38%
Dartmouth	1	13%	2	25%	5	63%
Dawlish	2	13%	7	47%	6	40%
Exmouth	3	17%	7	39%	8	44%
Holsworthy	1	25%	2	50%	1	25%
Honiton	1	8%	4	33%	7	58%
Ilfracombe	0	0%	5	63%	3	38%
Ivybridge	2	8%	5	21%	17	71%
Kingsbridge	3	15%	14	70%	3	15%
Newton Abbot	3	13%	3	13%	18	75%
Okehampton	1	6%	9	56%	6	38%
Ottery St Mary	2	29%	3	43%	2	29%
Sidmouth	0	0%	7	88%	1	13%
South Dartmoor	0	0%	10	53%	9	47%
South Molton	1	9%	5	45%	5	45%
Tavistock	1	5%	13	62%	7	33%
Teign Valley	2	25%	4	50%	2	25%
Teignmouth	1	9%	2	18%	8	73%
Tiverton	3	21%	4	29%	7	50%
Torrington	0	0%	3	38%	5	63%
Totnes	1	6%	9	56%	6	38%
West Exe	0	0%	3	38%	5	63%

Equally in 10 Learning Communities across Devon more than 50% of childcare providers reported that there was not enough childcare in their area. Of these, 3 learning communities had 75% or more of their childcare providers reporting that there was not enough childcare in their area. These were Braunton, Clyst Vale and Sidmouth.

This shows that there are split views across the county, reflecting the local perspective. The providers in the following Learning Communities felt strongly that there was insufficient childcare (over 60% of respondents):

- Ilfracombe
- Kingsbridge
- Sidmouth
- Tavistock

Percentages were also high for Braunton and Clyst Vale but should be viewed with caution because of the small number base. There were slightly more providers in Bideford, Okehampton, South Dartmoor and Totnes Learning Communities felt that there was insufficient childcare (50-60%) as compared to sufficient.

The providers in the following Learning Communities felt that there is sufficient childcare in their area:

- Barnstaple
- Crediton
- Dartmouth
- Honiton
- Ivybridge
- Newton Abbot
- Teignmouth
- Torrington
- West Exe

Table 5 – Is there enough childcare in your area by type

	Children's Centre		EY Setting		School	
Yes	5	45%	152	51%	43	34%
No	5	45%	109	37%	69	55%
Don't Know	1	9%	37	12%	13	10%
Didn't Answer	1		4		3	

Over 50% of schools said that they did not think there was enough childcare in their area, whereas just over 50% of Early Years Settings thought that there was. Children's Centres have split views with 45% saying there is and 45% saying there is not enough childcare in the area.

Table 6 – Is there enough childcare in your area by EY sub type

EY Sub Type	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
	Yes	58	45%	27	64%	2	50%	15	54%	47	52%	3
No	49	38%	12	29%		0%	9	32%	38	42%	1	17%
Don't Know	21	16%	3	7%	2	50%	4	14%	5	6%	2	33%
Didn't Answer	2		0		0		0		1		1	

% of those that Answered

Of Early Years Setting over 50% of nurseries, Out of School Settings and Pre-school Playgroups think that there is enough childcare in their area. However there are also high proportions of providers that say there isn't enough childcare.

Question 1a: What type of childcare is needed?

Of those that said there was not enough childcare the highest preference was for more childminders. 78% (142) of providers said there needs to be more childminders. The preference for more childcare specifically for school age children in terms of holiday play schemes and out of school clubs was also high. 58% (106) of providers reported there needs to be more holiday play schemes and 55% (101) said there needs to be more After School Clubs with Children's Centres, Early Years Settings and Schools all agreeing on this. Providers could select more than one type of childcare.

Chart 2- What type of childcare is needed?

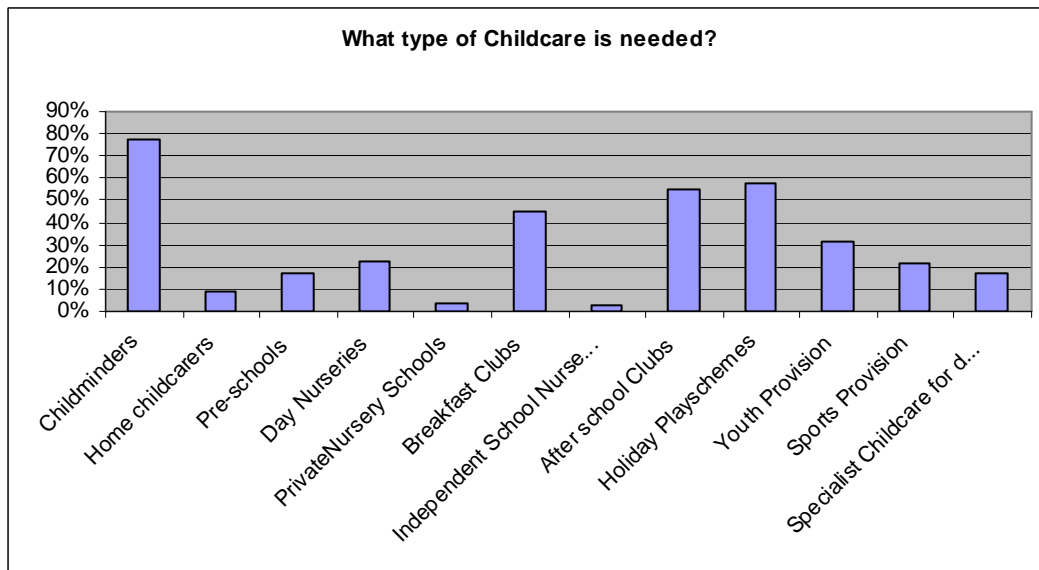


Table 7 – What type of childcare is needed by type of respondent

Type of childcare needed	Children's Centre		EY Setting		School	
	Count	%	Count	%	Count	%
Childminders	4	80%	90	83%	48	70%
Home Childcarers	1	20%	10	9%	5	7%
Pre-schools	1	20%	20	18%	10	14%
Day Nurseries	1	20%	31	28%	9	13%
Private Nurseries	0	0%	6	6%	1	1%
Breakfast Clubs	4	80%	53	49%	26	38%
Independent Schools	0	0%	4	4%	1	1%
After school Clubs	5	100%	55	50%	41	59%
Holiday Scheme	3	60%	65	60%	38	55%
Youth Provision	2	40%	33	30%	23	33%
Sports Provision	1	20%	25	23%	13	19%
Special Provision for disabled children	1	20%	21	19%	10	14%

% of those that said there was not enough childcare

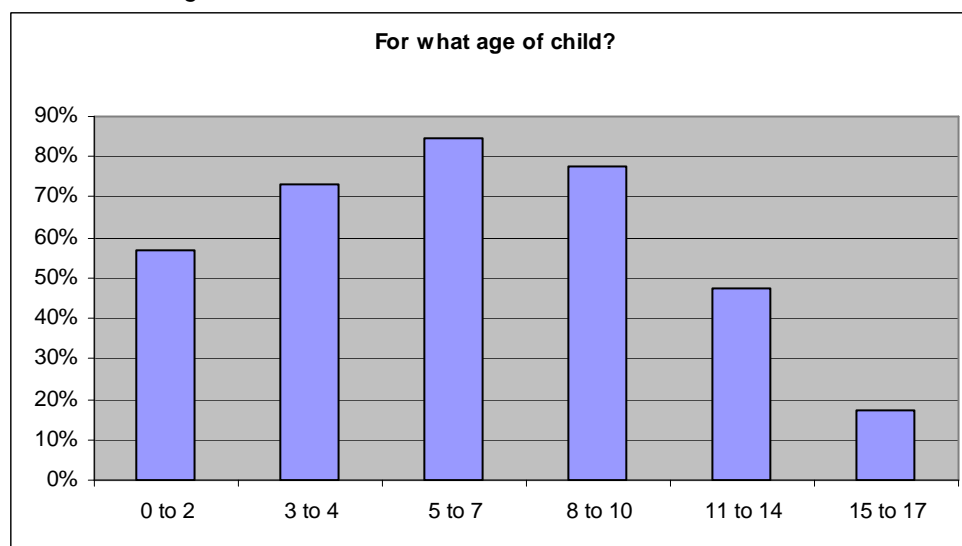
88% of childminders also agree that there needs to be more childminders. 56% of Out of School Settings agree that there needs to be more after school clubs and 67% agree there needs to be more Holiday Schemes. This recognition of the need for more of their own type suggests that either competition is not at a high level between these groups or their childcare provision is over subscribed.

Question 1b: Where is it needed?

Providers suggested locations all over the county.
Please see appendix 3 for list of places suggested by learning community.

Question 1c: For what age child?

Chart 3 – For what age child?



85% (155) of providers that said there was not enough childcare, reported that childcare is needed for 5-7 year olds with 52% of these stating this care should be with childminders.

Table 8 – Age of child needing childcare by type of childcare needed

	0 to 2	3 to 4	5 to 7	8 to 10	11 to 14	15 to 17
Childminders	86	99	95	86	45	17
Home Childcarers	12	11	9	8	5	5
Pre-schools	10	21	11	13	8	3
Day Nurseries	30	29	17	17	7	7
Private Nurseries	3	4	2	2		1
Breakfast Clubs	34	52	70	69	35	9
Independent Schools	1	2	3	3	1	2
After school Clubs	34	51	88	84	46	15
Holiday Scheme	39	65	86	81	61	22
Youth Provision	18	25	42	43	46	18
Sports Provision	16	22	29	30	27	10
Special Provision for disabled children	15	16	24	22	17	13

over 50% of those that said not enough childcare
 over 25% of those that said not enough childcare

The main age groups that require more care are from 3 to 10 year olds for both childminders and out of school provision. The childminders age group also extends to 0 to 2 year olds and holiday and out of school provision extends to 11 to 14 year olds.

Providers commented that there is a lack of care for secondary age children for after school care and a lack of holiday care for under 5's. There were also a few providers that mentioned the need for more specialist care for age 5+.

Providers also reported that there is a need for Under 3's, mainly 2 year olds but this needs to be affordable.

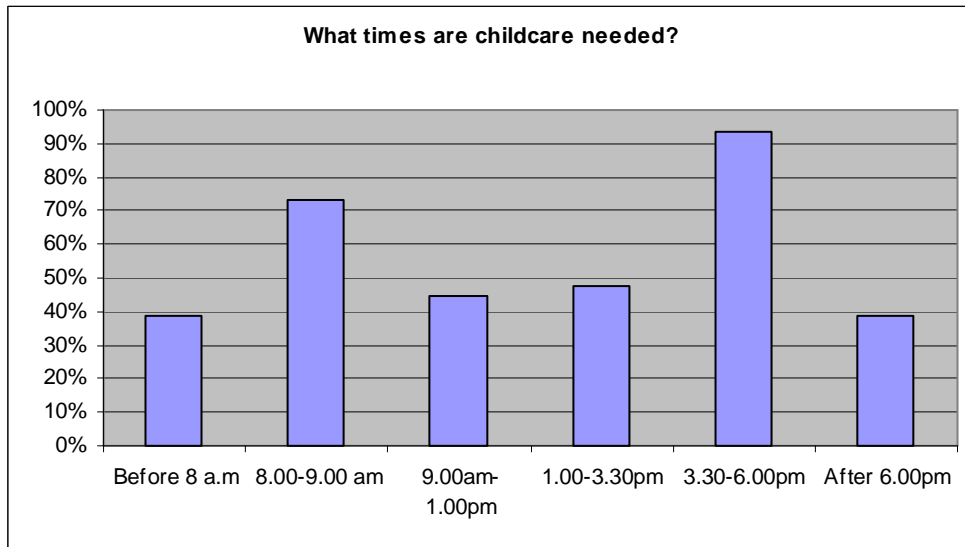
Some comments included:

- The After School Club takes from 4 years but the pre-school is saying there is a need for 3 year olds after pre-school finishes
- 11-14 youth provision not available (Barnstaple, Ilfracombe)
- After School Clubs are needed for older children (secondary age) – after school activities
- Out of school care for secondary ages – nothing after pre-school. This is also the same for early years.
- We are trying to get care for older children
- Childcare is needed for under three's. Parents want cheap places to leave them - affordable childcare.
- Parents want care from 2 years, some pre-schools can't offer this
- 2 ½ year olds may be need provision
- Need for breakfast clubs for 5-11 years
- Challenging Behaviour – there is CEDA but lack of other provision for age 5+,out of this area
- 8+ - needs more for age range and especially for SEN
- Being asked to take 2 year olds but we have no room
- There is a gap for baby care
- Baby care is needed. Not enough childminders. Most are full.

See Appendix 4 for full comments from providers about what age child care is needed for.

Question 1d: What times are childcare needed?

Chart 4 – What times are childcare needed?



Almost all (93%) of providers who thought there was not enough childcare in their area, said that more childcare is needed between 3.30pm and 6.00pm. These times are from After School until parents/carers return home from work.

A high proportion (73%) thought that there needs to be more care from 8.00am until 9.00am. These are between the times parents/carers go to work and school starts.

Table 9 – Times childcare needed by type of childcare needed

	Before 8 am	8.00-9.00am	9.00am-1.00pm	1.00pm-3.30pm	3.30-6.00pm	After 6pm
Childminders	53	88	57	62	115	41
Home Childcarers	6	8	6	8	13	6
Pre-schools	4	16	15	16	15	7
Day Nurseries	17	28	24	24	30	13
Private Nurseries	3	2	2	2	2	3
Breakfast Clubs	31	64	23	28	65	21
Independent Schools	2	2	1	1	2	3
After school Clubs	30	57	24	30	91	29
Holiday Scheme	33	69	41	45	86	37
Youth Provision	18	31	17	20	43	33
Sports Provision	13	15	11	13	27	21
Special Provision for disabled children	18	22	13	14	28	15

over 50% of those that said not enough childcare

over 25% of those that said not enough childcare

Over 50% of those that said there was not enough childcare in their area stated that the care needed is for between 3.30pm and 6.00pm and that the care should be with childminders. Over 25% reported that childminders are needed before 8am right through until 6pm. This suggests a general lack in the number of childminders.

Providers reported that there needs to be more childcare provision for out of school. This includes opening before school from 7am, after school clubs running until 6.30pm-7.00pm, evenings, Saturdays (but not Sundays), more holiday care open for longer hours and Bank Holidays. Where pre-schools weren't running afternoon sessions it was suggested that this should be considered to provide more care. It was also suggested that more flexible care should be available for shift workers.

Some comments included:

- In Axminster parents are asking especially for the pre-school to open longer in afternoon where presently only operating a morning session.
- Early evening, weekend (particularly teenagers), bank holidays and also overnight care is required.
- Shift workers need flexible times.
- After School Clubs – open until 6.30pm
- Requests for Saturday care.
- Puffins' staff are being asked to babysit on Saturdays.
- No requests for Sunday care as this is not good for children
- There is not enough overnight care/weekend.
- Holiday care doesn't start early enough or finish late enough.
- Before and After School, 8.00am until 6.00pm
- Evening care – childminders working until 8.30pm/9pm

See Appendix 5 for full comments from providers about what time care is needed.

Table 10 – Times childcare needed by type of age of child it is needed for

	Before 8 am	8.00-9.00am	9.00am-1.00pm	1.00pm-3.30pm	3.30-6.00pm	After 6pm
0 to 2	46	72	61	62	81	38
3 to 4	49	93	70	74	107	38
5 to 7	54	98	47	52	134	48
8 to 10	50	88	42	46	120	48
11 to 14	32	48	26	26	72	43
15 to 17	12	20	13	13	26	21

over 50% of those that said not enough childcare
 over 25% of those that said not enough childcare

The main times of concern and age of child are between 8.00am – 9.00am and 3.30 – 6.00pm for ages 3-7. Over 50% of those that said there is not enough childcare in their area reported that care is needed at those times and for this age group.

A similar high proportion reported that between 3.30pm and 6.00pm, more childcare is needed for the 8-10 age group.

Question 1e: What evidence do you have that parents need more childcare in your area?

Table 11 – Types of evidence

Evidence		
Enquiries	32%	65
Conversations/Discussions with parents	17%	34
Provision full/Waiting List	16%	32
Providers own Knowledge	12%	25
Consultations	10%	21
Closure of other provision	3%	6
Children on the streets	1%	2
Children's views	1%	3
Having to travel for provision	5%	10
Provider completed an Audit	1%	2
Other	8%	16

202 providers answered this question. Percentages are of those who answered the question

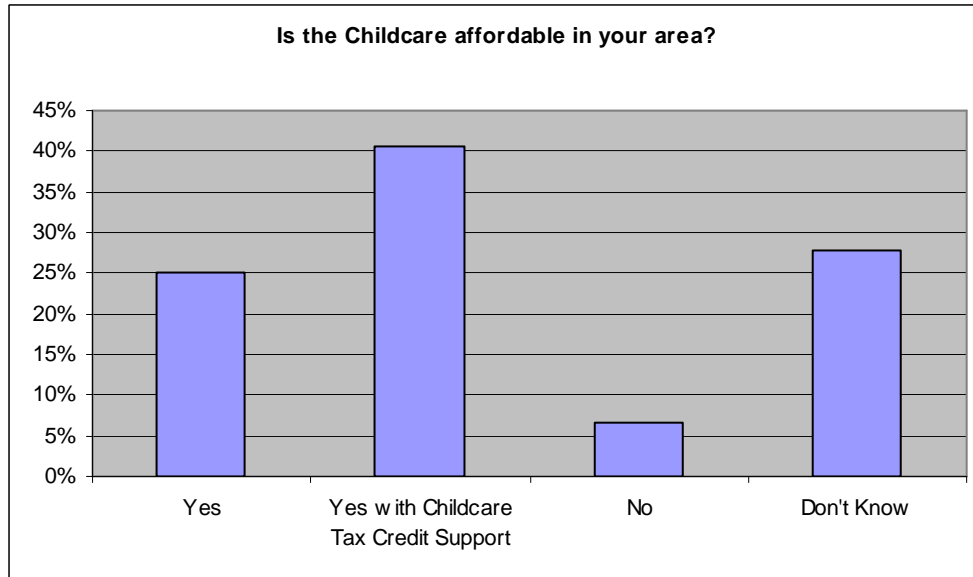
Providers views on the sufficiency of childcare in their area is influenced by a mixture of sources ranging from more formal evidence they have collected through consultations (10%) to more informal conversations or discussions with parents (17%). However the most common form of evidence and perhaps the strongest is through direct enquiries received.

Just under a third of providers have had enquiries about childcare providing evidence for the previous questions. 16% also reported that their provision was full and/or they had a waiting list.

Affordability of Childcare

Question 1f: Is the childcare affordable in you area?

Chart 5 – Is the childcare affordable in your area?



The majority, two thirds, of childcare providers, think that childcare is affordable or that it is affordable with the support of childcare tax credits. Over a quarter (28%) of providers do not know whether childcare is affordable. Only a small proportion felt that childcare was too expensive.

Table 12 – Is childcare affordable by Type of Provider

	Children's Centre		EY Setting		School	
Yes	1	8%	51	35%	17	14%
Yes with Childcare Tax Credit Support	5	42%	64	44%	42	36%
No	3	25%	3	2%	12	10%
Don't know	3	25%	26	18%	47	40%
Those that didn't Answer	0		158		10	

% of those who answered

80% of Early Years settings, 50% of schools and 50% of Children's Centres think that Childcare is affordable or that it is affordable with the support of Childcare Tax Credits however the majority of providers across all types think that it is just affordable with Childcare Tax Credits. This shows the importance of the contribution that childcare tax credits makes to the affordability and hence the importance of promoting take up of Childcare Tax Credits.

Providers report that for the first time since they have been operating, parents are struggling to pay their bills and in some cases are not paying them. This suggests that the cost is becoming unaffordable to families. This could be due to the financial situation the family is in or the level of fees of the provision. In some cases providers report they are being creative about charging in order to help out families.

Providers also report that many parents are now only using their free 15 hour entitlement and not paying for wrap around care.

Some providers reported that lack of taking up childcare tax credits makes childcare expensive for some families.

Some comments about affordability from providers include:

- Parents not paying, not had that before!
- 15 hours increase means parents using all their funding and not paying for additional hours such as pick up from playschool
- Creative around charging for 'hours' so we can help families in areas – no sessions flexible
- Quality and affordability – Don't go together
- EYEF - £3.54 is struggle to improve quality and therefore wages on this funding in a rural pre-school
- After School Clubs - Parents just want to pay for an hour and don't realise the implications – impact of recession ASC charge per session
- ASC – affordable – difference in prices – leading to using informal childcare being used
- Early Entitlement will reduce quality. Level 3's costing more (15 hours) – not raising quality
- Expensive if you've got a big family
- Lack of taking up tax credits makes provision expensive for some families.
- It can mean for certain areas that are less affluent, affordability is a problem (this may be an after school problem)
- Recession impacted on paying
- CTC – not arriving on time – needs to be paid to childcare

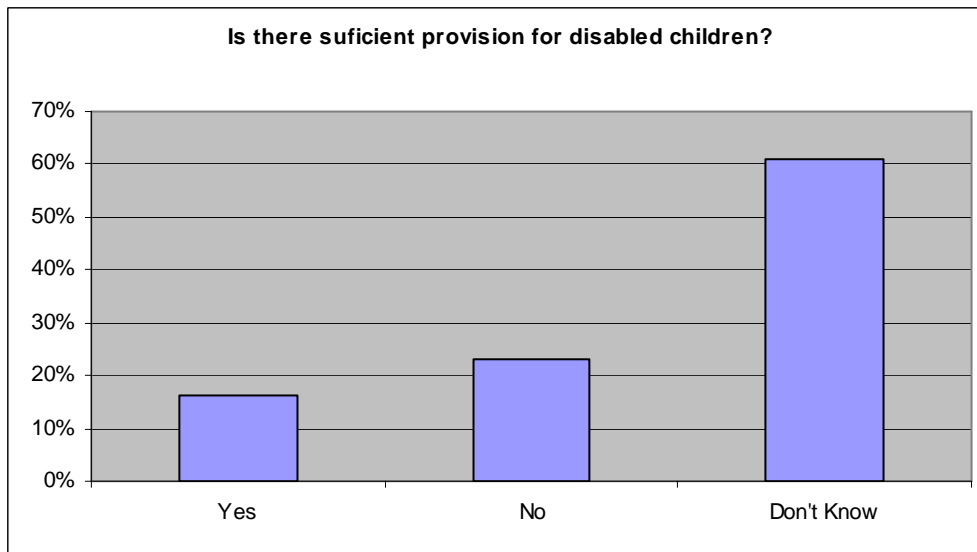
See Appendix 6 for full comments from providers about whether childcare is affordable.

However some providers stated that affordability and high quality do not necessarily go together and with only £3.54 per hour being received from the Early Years Education Funding it is difficult to improve quality.

Sufficiency of childcare for disabled children

Question 1g: Is there sufficient provision for disabled children?

Chart 6 – Is there sufficient provision for disabled children in your area?



The majority (61%) of childcare providers do not know if there is sufficient childcare for disabled children. Only 16% thought that there was sufficient provision for disabled children. A higher proportion (22%) thought that there was insufficient care.

Table 13 – Sufficiency of provision for disabled children by type of provider

	Children's Centre		EY Setting		School	
Yes	1	8%	22	16%	21	18%
No	3	25%	35	25%	24	21%
Don't Know	8	67%	84	60%	72	62%
Didn't Answer	0		161		11	

% of those who answered

Most childcare providers do not know whether there is sufficient childcare for disabled children. This shows that there is a lack of awareness of what is available for disabled children. Alternatively this could mean that settings are interpreting this as specialist provision and not taking into account the inclusive nature of their own provision.

For the providers that thought there was insufficient care, they commented that the lack of provision for disabled children could be due to the limitations of the buildings, or a lack of funding to support parents to take up provision for disabled children. Providers also report the need for more support to be able to provide care for disabled children.

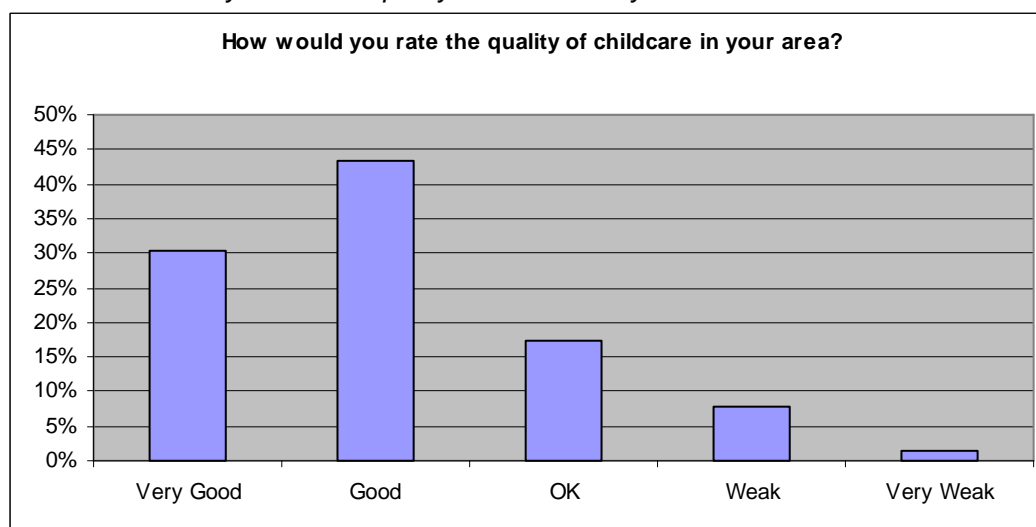
Due to the lack of provision there is little choice for parents with disabled children on where they can access provision.

See Appendix 7 for full comments from providers about the sufficiency of provision for disabled children.

Quality of childcare

Question 1h: How would you rate the quality of childcare in your area?

Chart 7 –How would you rate the quality of childcare in your area?



Nearly three quarters (73%) of providers think that the quality of childcare in their area is good or very good. 90% of providers think that quality of childcare is OK, good or very good. Only one in ten thought that the quality was weak. This view was strongest amongst the Early Years childcare settings themselves.

Similarly approximately three quarters of schools and early years settings would rate the quality of childcare in their area as good or very good. However, Children's Centres were less sure about the quality of childcare.

Table 14 – Quality of childcare by type of respondent

	Children's Centre		EY Setting		School	
Very Good	1	13%	54	31%	24	31%
Good	3	38%	75	43%	35	45%
OK	3	38%	27	15%	15	19%
Weak	1	13%	15	9%	4	5%
Very Weak	0	0%	4	2%	0	0%
Didn't Answer	4		127		50	

% of those who answered

Table 15 – Quality of childcare by type of respondent – Good and above

	Children's Centre		EY Setting		School	
Good & above	4	50%	129	74%	59	76%

Table 16 – Quality of childcare by sub type of respondent

	Childminder		Nurseries		OOS		Pre-School Playgroup		Unknown	
Very Good	26	34%	6	26%	1	7%	20	36%	1	20%
Good	32	42%	11	48%	7	50%	24	44%	1	20%
OK	13	17%	5	22%	3	21%	5	9%	1	20%
Weak	5	6%	1	4%	1	7%	6	11%	2	40%
Very Weak	1	1%	1	4%	2	14%		0%		0%
Didn't Answer	53		19		14		36		2	

% of those who answered

A high proportion (76%) of Childminders, 69% of nurseries and 80% of Pre-schools would rate the quality of childcare in their area as good or very good whilst out of school clubs were less sure.

Childcare providers report that they are finding ECERS a useful way of improving their quality. However providers report that parent's are not interested in the quality of the childcare but choose childcare based on convenience. Where parents are concerned about the quality of provision word of mouth seems to be the best way of promoting quality not Ofsted inspections.

See Appendix 8 for full comments from providers about the quality of childcare.

Providers Comments

Question 1i: Any other comments about the childcare in your area?

Rurality and Transport

Due to the rurality of Devon, providers reported that it is difficult to provide all types of provision in all areas. This is due to the small numbers of children in the areas meaning that there are insufficient children to make a provision (such as an after school club) viable. Some providers suggested linking with nearby areas to run provision but this then raises the issue of transport. Transport is a big issue in rural parts of Devon and providers would like more support with this. Childminders also report that multi pick ups in rural areas are also a problem.

Parents

One problem many providers reported was that parents do not understand what goes on in the provision. Providers reported that parents seem to think that children just go to play and do not understand the level of planning that goes into a session and the education that is incorporated into the care.

Single Point of Entry

Another major issue for Childcare providers is the Single Point of Entry. With some schools starting this September 2011, providers will be losing quite a few 4 year olds at once which will cause financial problems for some providers. Many providers are considering taking 2 year olds to compensate for this.

Premises

Providers also reported that premises limitations are also a problem. Due to the fact that many settings are held in rented property, village halls and church halls, providers can not make permanent alterations to the buildings. This means that they can not adapt their buildings to enhance provision for disabled children or improve their scores in their ECERS audit to improve quality or expand to provide extra provision. Many providers also reported that there is a lack of suitable provision for them to move to in the future.

Staff and Qualifications

Some providers reported that they are finding it difficult to recruit qualified staff. This is due to the lack of qualified staff but also the cost of paying a qualified member of staff. Also providers reported it is difficult to make provision sustainable in rural areas due to the need to recruit qualified staff.

Provider Reflections

The following questions were only asked to Early Years Settings

Question 2:

Looking back – what has been the impact of the recession on your childcare business over the last year?

Table 17 – Impacts of the recession on providers

Impact		Number of Providers
No Impact	No Impact	103
Less Enquiries	Less enquiries	12
Big Impact	Has had a big impact	2
Parents	Lost Children	61
	Parents Job Losses	49
	Parents making private arrangements	17
Financial Issues / Funding	Parents not paying bills	11
	Parents unable to afford fees	15
	Children doing funded hours only	28
	Low take up of unfunded	17
	Reduction of Children's hours	40
	Financial Problems	18
	More fundraising	3
Staff	Reduce Staff work hours	9
	Staff Leave	5
	Low staff wages / pay rise	7
	Recruitment Problems	2
Sessions and Resources	Stopped sessions	3
	Cut back on resources/equipment	5
Impact of other development	Impacted by development of other provision	5
Closure	Considered ceasing / get another job	5
Positive impact of the recession	Increase in children as other parent starting work / longer hours	11
	Has been busy	11
	Increasing opening hours	2
Other	Other	75

No impact

A large proportion of providers reported that there had been no impact to their business over the last year due to the recession. Some reported that this was because they were careful with their budget. Others reported this was because there is still a high demand for the provision with children on long waiting lists or they were mainly taking funded children and with the increase to 15 hours funded provision it had actually helped their business. Other reasons for it not having an impact were because they were a maintained nursery or the provision had only just started or they were childminders on maternity leave or that the parents of the children were in jobs that were safe such as vets and teachers.

Less enquiries

Comments included:

- A considerable decrease in enquiries with many existing users reducing their hours. This together with the increase in private nurseries is impacting home based childcare.
- I am still working at the same level. However, I have had very few new enquiries.
- Fewer enquiries - I think this may be because there are fewer jobs available, therefore more parents at home, looking after their own children or because more family members unemployed, so available to provide free childcare to close family members.

Big Impact

- As at September 2009 we had 17 leave us - a mixture of school leavers (9) other (4) hours cut (4). Half term we had two more leave unexpectedly and at Christmas we had a further 8 leave for school. To date this year we have had another 6 leave again a mix of leavers or hours cut. At Christmas I had to lay off 2 full time staff and cut part timers hours. So overall the impact of the recession has been BAD for us.

Parents

Out of the 61 providers that said they have lost children over the past year, 35 specifically reported that this was due to the fact that parents have lost their jobs, been made redundant or have reduced their hours. This means the parents are home to look after their children, therefore do not need childcare or they cannot afford it.

Other reasons for losing children are that they are moving to go to other provision where the Early Years Entitlement can be claimed or where the fee is cheaper or parents are making personal arrangements. Other providers reported that parents are choosing to give up work to look after their children as it is a cheaper option.

Comments include:

- Several children reduced days or session. 3 children left as a result of parents being made redundant. Losing more children to local p/schools at age of 3 - cost implication when doing sessions over and above funding.
- I have had one family whose main income earner was made redundant. The children did not attend my setting whilst the parent was looking for work which had an impact on my income as I tried to keep the places available to ensure the parent could apply for work.
- The impact has been parents either leaving their jobs or having their hours cut. This means as a registered childminder I have less work. I now have had to take an outside job in order to supplement my income. Not what I wanted to do.
- I have lost a child from my setting due to a mum giving up work instead of paying for childcare, as it was costing her more for childcare than she was being paid (voluntary pay cut) the company then dissolved.

Financial Issues / Funding

Due to the fact that parents are losing their jobs and the general impact of the recession on family budgets, providers report that parents are struggling to pay bills and are getting into debt. They are having to chase payments and this affects cash flow.

Comments include:

- Families are getting into debt. They are getting into arrears with session fees. There is a lot of stress in family life.
- Collecting Fees has been a major problem with parents leaving and not paying invoices.
- Staff costs are increasing but parents are not able to pay more. All costs keep going up, but our parents (60%) do not work and claim funding.
- Some difficulties with families paying fees on time. This can effect budget planning. Looked at fee rates of other groups in the area to be competitive and not over priced. Morning sessions seem more popular. Over subscribed (work and non-work families).

Providers report that parents are unable to afford fees and so parents are choosing for their child to only attend the funded hours. This means that there is a low take up for unfunded sessions and an overall reduction in children's hours.

Some comments include:

- Parents cutting back on sessions until children are funded.
- Less unfunded hours accessed, only using 15 funded hours.
- Less take up of non-funded sessions. Premises limitation - no afternoon sessions - parents need 'full day' so go else where for pre-school and funded sessions.
- Parents are only using their funded hours and only doing extra hours if necessary i.e. work etc so number are lower each session and parents are waiting for their children to start when funding is available so not to pay fees.
- Parents are waiting until children are eligible for funding before increasing the number of hours at pre-school.
- Although numbers have grown I've have not attracted the numbers necessary to provide consistent levels of staffing. It is apparent that the recession has reduced the take-up overall.
- We tried to extend our hours to go with parents needs. Parents then could not afford the extra cost. Sessions were dropped by parents as they could not afford the cost.
- Some parents mainly single mums cannot afford to bring their children for the extra 2.5 hours offered and only take up the free hours. Parents rarely put in their children and pre-school before they are funded.
- Fewer parents able to afford childcare. Reduction of children accessing full day care - especially 3 and 4 year olds.
- Parents have held their child back or not attended as many sessions until fully funded a term after 3rd birthday. Rather than having a steady flow of registered attending children our session attendance figures are a lot

more fluctuated. Parents don't want to be hit with massive childcare bills regardless of payment options.

- Parents have become very aware of the costs and are looking at things such as payment schemes more closely. More parents are using just their child's education funding hours...not affording to top up with additional care. Parents are looking for care for their 2 year olds... as some parents have lost their jobs, forcing both parents to look for work... usually lower paid. More parents are using child tax credits to afford their child care.

Due to the financial issues mentioned above, providers now have to do more fundraising.

Comments include:

- Little impact on numbers as we have dropped our fees for the 1st hour in the afternoon but this has affected our income and a need for fundraising is important.
- Running costs still need to be covered so we have to do more fundraising.
- We have fund raised to provide some subsidised places for those in need.

Staff

The reduction of children due to parent's job losses and fees means that providers have had to reduce staff working hours. Some providers have reduced all staff working hours in order to avoid having to make members of staff redundant and for all to keep their jobs. Once numbers increase again providers are then able to increase staff hours again. However where this has not been possible, providers have had to make some staff redundant.

Also in order to keep costs down providers report that they have not been able to give a pay rise this year or if they have it has been a very low rise. Due to this or other reasons staff have also left settings.

Comments include:

- Children numbers dropping due to job loss. This has meant staff hours cut and no wage increase. Staff are looking for other jobs.
- Lost some children/parents as their hours at work were reduced. Our staff had to work reduced hours to avoid making anyone redundant. Picking up again in 2010.
- Staff have had to take hour and pay cuts for us to survive.
- We have low numbers for the year 2010-2011. We have had to reduce staff hours.
- Staff wages still very low with not much hope of being above minimum wage level.

Sessions and resources

Due to the fact that providers are having to cut costs and children are leaving, providers report they are having to stop sessions and cut back on resources.

Comments include:

- Parents are having fewer sessions than before the recession; so much so that we have had to close the pm session. Also local school has opened a foundation unit; Parents are attending there for convenience as older siblings are attending school.
- We did have to stop our ASC as making a loss.
- Lack of money for resources due to lack of children.
- Due to increased fuel and living costs I have cut back on outings to activities that cost extra - e.g. travel costs to zoos, beach, parties etc. I have bought fewer resources for my setting. Food costs mean that the food I was providing was being charged at less than cost and cooking.

Impact of other development

Comments include:

- The recession has only hit us slightly with only 2 parents reducing hours. However since the opening of the local Out of school club our numbers have dropped dramatically during school holidays and as such we no longer have children of school age during the holidays. As well as the out of school club, the local sports centres offer out of school care for £9.00 per day (7 hours) we can not compete with this. The problem has been (and still is) exaggerated further by local schools recommending ONLY the out of school club and not making parents aware of other providers NOR following Devon/DISC guidelines.
- Also local school has opened a foundation unit; Parents are attending her for convenience as older siblings are attending school.
- A considerable decrease in enquiries with many existing users reducing their hours. This together with the increase in Private nurseries is impacting home based childcare.

Closure

A few providers reported they had considered ceasing their provision due to the effects of the recession.

Comments include:

- Parents are arranging to look after each others children or giving them to parents to look after. This has meant that the numbers of children have dropped dramatically. This has meant that we have had to reduce work hours for the staff which has lead to good professional childcare workers leaving which then has a domino effect on more children leaving. We are barely breaking even at this time and have considered have to sell business after 21years of childcare
- I have lost children through parents loosing their work. Parents divorcing. Not filling vacancies. Having to take on alternative work myself and nearly gave up childminding.
- I have endeavoured to keep my rates down with no increase to parents. However I have had increases in running my business. It has curtailed

certain activities that I would have done previously. I have also had parents who have lost their jobs so have left as they cannot afford childcare. I have at times considered giving up altogether.

Positive impact of the recessions

24 providers reported that the recession had had a positive impact on their business. Providers report that they have been busy due to an increase in children as the other parent had now had to find work to increase household income meaning the children now need care. Some providers also reported that they are increasing their opening hours.

Comments include:

- More mothers seeking childcare as they are getting part time jobs as their husband or partners jobs are shaky or under threat of redundancy.
- Increased take-up in childcare as parents have taken on overtime/extra work. Need to extend hours 8-6
- At first it affected us but after a couple of months we had more babies starting with us whose mothers were deciding to cur short their maternity leave and return to work earlier than originally planned.
- Hasn't really affected my childminding as still as busy as I can be.
- Increased take-up in childcare as parents have taken on overtime/extra work. Need to extend hours 8-6

Other Comments

- Some children have left as a result of affordability - this is a very small percentage. We have been through a quite rapid period of growth, this is possibly to do with our Ofsted inspection and we have taken some large steps with regard to improving premises and facilities. We have offered slightly longer opening hours to accommodate some parents who are having to work later.
- Over past 12 months our provision has moved premises down sizing from 75 places per day to 40 per day. This has resulted in us having to reduce the amount of children on our register by 60 children. We have not lost any children as a direct affect of the recession.
- It has been quite bad; I think parents are finding it hard paying for it etc. But it is us childminders that struggle as we don't get any help or benefits.
- Had a good feedback on parents about my settings that they felt they didn't want to lose my care. Had a good relationship with both parent and child.
- I haven't notices the impact - largely due to the fact that childcare is a necessity rather than luxury - I guess more parents are having to work therefore more childcare is needed.
- I've only recently started childminding but have noticed the impact of before & after school clubs have had on my childcare facility and also others in the area.
- Parents seem to be busier, less time to help out voluntary basis, they are usually working. Less fundraising money given when asked for.

Looking forward what are your future plans over the coming year?

Table 18 – Providers Plans for the future

Plans		Number of Providers
Staff	Recruit more staff	7
	Increase staff hours	1
	Increase wages	2
Qualifications	Develop qualifications and training	37
	Develop EYP	5
	Become a specialist	8
Rates and Fees	Increase rate/fees	10
15 Hour Extended and Flexible Entitlement	Provide 15 hours / extended entitlement	22
	Become more flexible	24
Funding	Get funding or fundraise	14
Expansion	Take more children	32
	Look into taking 2 year olds	20
	Start breakfast/after school	12
	Increase hours	30
	Relocate	22
	Expand	39
Promotion	To build better relationships	2
	More advertisement	40
Quality	Improve quality	16
Existing Provision	Develop current sessions/activities	5
	Develop facilities	37
Maintain Current Provision	Maintain current situation	48
Decrease Provision	Decrease service	3
Cease Childcare Provision	To leave childcare	17

Staff

Some providers report that over the next year they have plans to increase staff hours and recruit more staff. They also plan to increase the wages of staff.

Comments include:

- We are at present about to enter into a new phase - New nursery with an increase of 40 children. An exciting time bringing extra places to an area in which we have been full continually and employing an extra 10 staff initially.
- Opening a new nursery in June increasing to 100 places from 60. Employing new staff. Getting an 'Outstanding' inspection for new nursery.
- We plan to increase staffing levels. We will look at increasing no of sessions offered from 8 to 10 per week.
- I would like to be able to raise wages to attract quality staff but we would need to raise fees to do that and this will loose us customers.

Qualifications

Many providers report their plans for themselves or their staff to gain qualifications such as Level 3 qualifications or undertake continued professional development opportunities.

Comments include:

- New staff to have gained NVQ3. Get all staff on Safeguarding 2 day course as only 1 full time, the rest part time.
- To train more staff in child protection/safeguarding.
- The main developments are in respect of staff CPD. Most staff are working towards qualifications and we are keen access any training and development pathways offered.
- In October 2010 I plan to start a new level 3 qualification (Level 3 children and young people's workforce diploma).
- Gain ICAN accreditation.

Some providers specifically reported that they want to become an EYP or have someone from their setting gain EYP status.

Comments include:

- Early Years Foundation Degree heading for EYP status to support child development and parents understanding of child development.
- To grow our own Early Years Professional.
- The nursery also has two possible candidates for EYP and we hope to have at least one qualifies EYP by autumn.

8 childminders also reported that they would like to become specialist childminders in order to take funded children.

Rates and Fees

Comments include:

- Need to put my rates up but have not done for 5 years as its finding the right time to introduce a new rate.
- Fees increases anticipated. Low inflationary award on remuneration. Scrutiny of services to ensure continued viability.
- Unfortunately I have had to increase my hourly rate and meals rate.

15 Hour Extended and Flexible Entitlement

22 providers reported that their aim over the coming year is to get to grips with providing 15 hours Early Years Entitlement and become more flexible.

Comments included:

- To move on to school site and extend from sessional to move flexible provision i.e. morning session - lunch - afternoon session with the option to stay all day. 2.5 days rather than 5 sessions to accommodate working parents.
- Consolidate our delivery of the 15 hours flexible funding and review what we now provide against what parents are asking for/needing.
- Incorporate 15 hours. Send out questionnaire to extend.
- Recently introduced 15 hours flexible provision - including a lunch club, so our future plans are to continue to monitor/develop this / receive feedback from parents.

- To implement 15 hours funding fully. To try to keep costs as they are.
- More flexibility with part time spaces.

Funding

Many providers reported the need to fundraise or get funding in the next year.

- Need for more fundraising to keep us sustainable.
- We are trying to refurbish and update our very old, leased pre-fab building. (Leased from the school/DCC). However funds are extremely limited and school will only maintain the roof. Would love to expand the provision with a separate unit for babies as very limited on space for babies, but again costs/space in which to add building is limiting these plans. Would really like to develop garden area into multifunctional/all weather area but would constitute a huge financial commitment to develop an area we only lease.
- Our funding income is not sufficient to cover all our expenses; therefore we need to work hard fundraising, which in the current climate isn't very easy. We work hard with parents and the local community to promote, our setting and available resources.
- Fundraise, fundraise, fundraise!
- To try to raise sufficient funds to cover our cost.

Expansion

Many providers report they want to expand their provision over the next 12 months. This includes taking on more children, looking into taking 2 year olds, starting a breakfast or after school club, increase their current hours, expand their building or relocate.

Comments include:

- To increase my hours as I am currently working part time. This will mean taking on more children.
- Encourage more staff qualifications. Possibly start taking 2-2 1/2 year olds to help with the impact on our funds when there is one intake to school.
- Assessment of building, training and resources with the view to admitting 2 year olds as from September 2011
- To bid for whatever funding is available for 2 year old children. To look at an after school club. To look at a breakfast club. To look at a holiday club.
- Moving to new building and being able to open longer house 8am to 6pm and over 50 weeks over year. Working with local school to provide out of school care.
- To move to a bigger house and may be get more business.

Promotion

40 providers reported that they would like to promote their business over the next year. The promotion includes promoting what they do during sessions, promoting the quality of their provision and raising their profile.

Comments include:

- Promote the nursery - that we are doing the same as schools! - All follow EYFS! Educate parents that they don't have to send to school until term after 5.
- To tell parents more about what we offer our pre-school children.
- To raise the profile of the 3-5's age group as some child leave to go to 'pre-school' and this is seen as more of a learning opportunity than nursery. We have changed the name to Pre-school to start this process. We have parents who are told that if they don't attend their local pre-school then their child will not get into the school which is not the case.
- Future Plans - 1) Build up public and parent awareness of what we do and the quality of the care and learning we provide
- Promoting our setting within the community at local mum ad toddler groups to raise awareness of over 3's and availability of Early Years Funding.
- Would like to have support in marketing strategy and hoping to use parents.

Quality

16 providers reported that their aim over the next year is to improve the quality of their provision.

Comments include:

- Possibly achieve 'Healthy setting' award. To improve in areas following ECERS audit.
- To always increase the quality of our childcare.
- Improve the quality of the provision by providing extra resources and responding to parental questionnaire.
- To introduce more toys to meet 'ECERS' so we achieve a good standard.
- To progress with the EYFS and gain another 'Outstanding' from Ofsted.

Existing Provision

Many providers reported that they wish to develop their current provision. This includes developing current facilities (mainly outside areas) and developing the current sessions and activities.

Comments include:

- Improving outside area - canopy / wildlife area.
- If we get the funding we hope to have a sensory garden for the children which will be joint effort between the nursery children and staff.
- To get my garden sorted - it's not currently signed off by Ofsted. To get more clients. To obtain some more qualifications.
- Looking to grow Breakfast Club by making it more themed - French Club with Breakfast etc.
- We are looking at introducing new workshops and activities for children, to encourage a greater participation in our holiday programme.

Maintaining Current Provision

48 providers reported that they simply would like to continue the way they are. Comments include:

- To continue to provide good quality accessible childcare that parents can afford.
- To carry on what I'm doing for the parent and child by giving the best care.
- Plans are to maintain the business as best as possible all-be-it on a smaller scale and hope that occupancy will increase again for us.
- To maintain a high level of service to our children and parents and to sustain the high number of children on roll.

Decrease Provision

3 Providers reported that wish to decrease their current service in the next year. Reasons include:

- ...Hoping to cut back on working days as am finding keeping up with children/paperwork/courses - very full on!!
- Continue to child mind but due to demand, reduce our hours slightly and stop after school pick-ups. We can concentrate our work towards the 0 to 3 age group.
- Cutting down due to other commitments

Cease Childcare Provision

17 providers reported that they wish to cease providing childcare, close their business or leave their current job. Of these 17 providers at least 11 of these were identified as childminders.

Comments include:

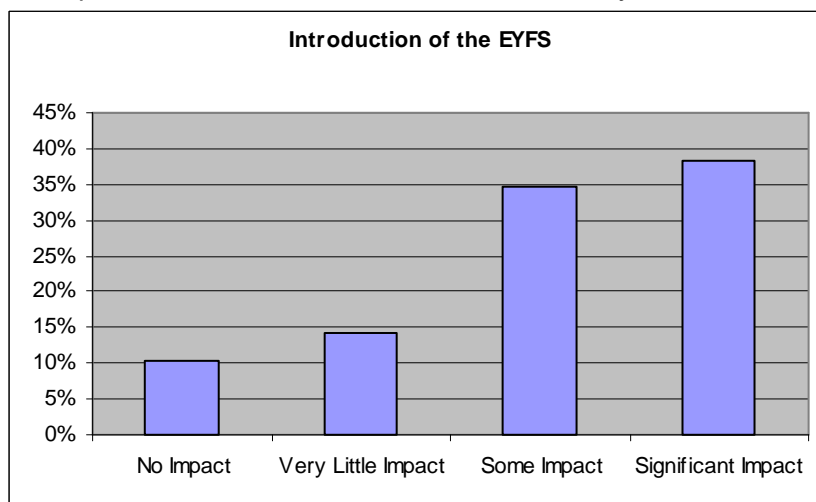
- To leave childcare - too much paperwork (which has to be done in the evenings, weekends when not minding) for too little financial reward.
- Possibly working somewhere else. Applying for jobs working term time. (childminding is now a mini school not play at home as when I started) Too much paperwork that no-one sees!!!
- Closure imminent
- If there is no more people wanting childcare by September I will have to give up and find another job which is what I really don't want to do as I love this job.
- To try to get a job in a different childcare setting

Impact of National Legislation and Local Changes

Question 3: Part 1: What impact have these national legislation changes had/will have on your childcare business?

3a: Introduction of the EYFS

Chart 8 – What impact has the Introduction of the EYFS had on your childcare business?



73% of Early Years settings reported that the introduction of the EYFS had had some or significant impact on their business.

Table 19 – Impact of the Introduction of the EYFS by Early Years Setting Sub Type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	45	37%	19	48%	1	25%	7	25%	39	48%	2	33%
Some Impact	46	37%	9	23%	2	50%	11	39%	27	33%	3	50%
Very Little Impact	17	14%	8	20%	0	0%	5	18%	12	15%		0%
No Impact	15	12%	4	10%	1	25%	5	18%	4	5%	1	17%
Didn't Answer	7		2		0		0		9		1	

% of those who answered

This table shows that the introduction of the EYFS has had some or significant impact on all types of childcare provision with the least impact on Out of School Settings.

Many providers comment that although the EYFS has a positive impact on the planning of sessions and the child's learning and development it has had a negative impact on their business by creating more paperwork, many of it unseen, which staff are not being paid for. This is mainly affecting childminders as they report that they quite often have to work additional hours to keep up with all the paperwork which is impacting on their personal and family lives.

Comments include:

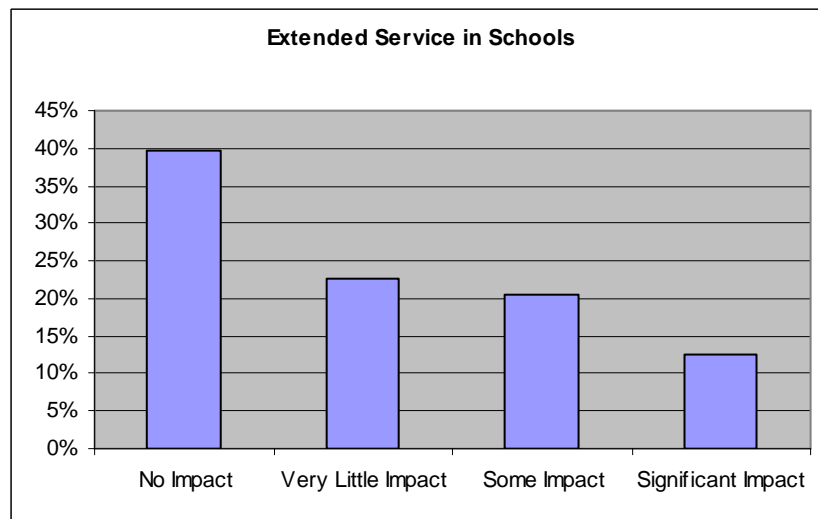
- I feel has had a positive impact on childcare in general. It makes sure that there has been a high level of care in all settings
- EYFS has increased paperwork for childminders - although it gives 'best practice' and a sound knowledge to work from. The extra that you are

required to do really doesn't match the amount you get paid per hour, per child.

- The EYFS has made a lot more record keeping. Things that children do make which once I sent home, now have to be kept, recorded fitted into the right section. This wastes time that could be spent with the children. I do not believe childminders should have to do that same as nurseries, pre-schools. It takes the choice of home-based childcare away from parents.
- Introduction of EYFS has been positive and we have noticed an improvement in behaviour- mainly because the children aren't distracted from play to follow routines as much. It has been a very costly change for us which it shouldn't have been, according to our EYA, but it has meant a large outlay

3b: Extended Services in Schools

Chart 9 – What impact has the Extended Services in Schools had on your childcare business



40% of Early Years Providers reported that the Extended Services in Schools had had no impact on their childcare business whilst 35% said that it had.

Table 20 – Impact of Extended Services in Schools by Early Years Setting Sub Type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	14	11%	8	21%	0	0%	6	23%	6	8%	0	0%
Some Impact	24	20%	7	18%	2	50%	10	38%	12	15%	1	17%
Very Little Impact	34	28%	8	21%	0	0%	4	15%	20	25%	2	33%
No Impact	50	41%	16	41%	2	50%	6	23%	42	53%	3	50%
Didn't Answer	8		3		0		2		11		1	

% of those who answered

The effect of Extended Services in Schools has had most impact on Out of School settings with 61% reporting that it had had some or significant impact on their business. This has had least impact on Pre-schools and Nurseries with 78% of Pre-schools reporting that this has had very little or no impact on their business.

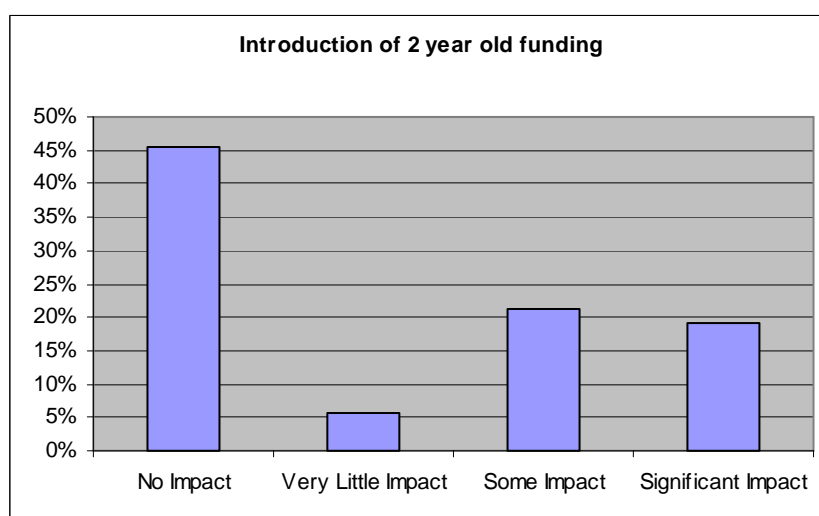
Childminders report that the after school and breakfast clubs at schools have taken their business and they can not compete with the prices.
 Day Nurseries report that this has impacted on their business and they have to open longer hours to compete with the schools.
 Maintained Nurseries report that providing extended services means that they need more time for administration for the clubs.
 Out of school club settings report that children are attending the free after school clubs at their school rather than using their provision causing a reduction in children attending their setting.
 Pre-schools also report that many children are attending free or cheaper holiday care. They are also unable to open longer hours to try to compete with the schools due to building restrictions.

Comments include:

- People are using school clubs a lot more and early funding has had big impact, if people can get reduced or free places they will take them rather than pay a childminder.
- School breakfast club now caring for my past children and those on my waiting list for Sept 10 as they will be starting school no longer want a place as school is cheaper
- Extended services in schools always have a knock on effect together with childcare providers extending places. Competition is good as we cannot and must not become complacent
- Extended services in schools during school holidays would lead to a dramatic reduction in numbers of children using our holiday scheme.
- With extended services we have suffered as we are a traditional pre-school and tied by a village hall commitments and only able to offer 9-11.30 at present.

3c: Introduction of 2 year old funding

Chart 10 – What impact has the introduction of 2 year old funding had on your childcare business?



The introduction of 2 year old funding has had no impact on 45% of Early Years Settings. However it has had some or significant impact on 40% of

Early Years settings, which could be those who are taking part in the 2gether pilot.

Table 21 – Impact of the 2 year old funding by Early Years Setting Sub Type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	24	20%	11	31%		0%	1	4%	20	27%	1	17%
Some Impact	28	24%	10	28%		0%	2	7%	21	28%	3	50%
Very Little Impact	11	9%	2	6%		0%		0%	2	3%		0%
No Impact	55	47%	13	36%	3	100%	24	89%	32	43%	2	33%
Didn't Answer	12		6		1		1		16		1	

% of those who answered

This had mostly impacted on Nurseries and Pre-schools with 59% of Nurseries and 55% of Pre-schools reporting that this has had some or significant impact on their business. Nurseries and Pre-schools report that the 2 year old funding has enabled families they know need the care but could not afford it, to access provision at their settings, however it should be available to all 2 year olds whose parents request it. Nurseries and Pre-schools also report that it will help financially with their businesses when the Single Point of Entry commences in September 2011.

Childminders report that for those that are not specialists, and would not be entitled to any funding for 2 year olds, it would mean a loss in 2 year olds to those settings where funding was available. Childminders can not compete with this.

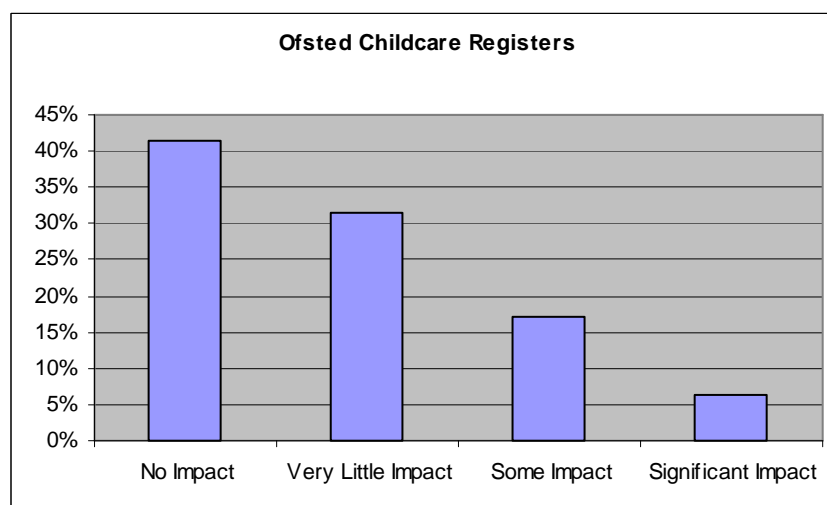
Comments include:

- However with regard to funding 2, 3 and 4 year olds few families' need this unmeans tested benefit and with tax credits it is unnecessary for low income families. This is possibly a waste of money in the current economic climate as only people on higher incomes benefit from this funding.
- Funding for 2 year olds would reduce our numbers and mean we would probably only care for babies.
- I am concerned that when the 2 year old funding entitlement comes in I will lose the business of all these parents who for financial reasons, will be forced to send their children to nursery settings - This will take away parental choice - hence I hope to become accredited
- For childminders we struggle to give competitive prices against pre-schools and schools. If funding was given to 2 year olds and extended / flexibility entitlements for 3 and 4 year olds then it would have a significant impact on the affordability of childminders. Most childminders would have to start working very unsociable hours to fill the gaps of pre-schools / schools who offer flexible times across the day / week

The least impact of the 2 year old funding is on Out of School settings with 89% reporting that there is no impact.

3d: Ofsted Childcare Registers

Chart 11 – What impact has the change in Ofsted Childcare Registers had on your childcare business?



72% of Early Years settings reported that the Ofsted Childcare Registers had had very little or no impact on their childcare business.

Table 22 – Impact of Ofsted Childcare Registers by Early Years Sub Type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	9	7%	5	12%	0	0%	3	11%	1	1%	0	0%
Some Impact	18	15%	9	22%	0	0%	8	30%	17	21%	0	0%
Very Little Impact	37	30%	12	29%	0	0%	8	30%	35	43%	1	25%
No Impact	59	48%	15	37%	3	100%	8	30%	28	35%	3	75%
Didn't Answer	7		1		1		1		10		3	

% of those who answered

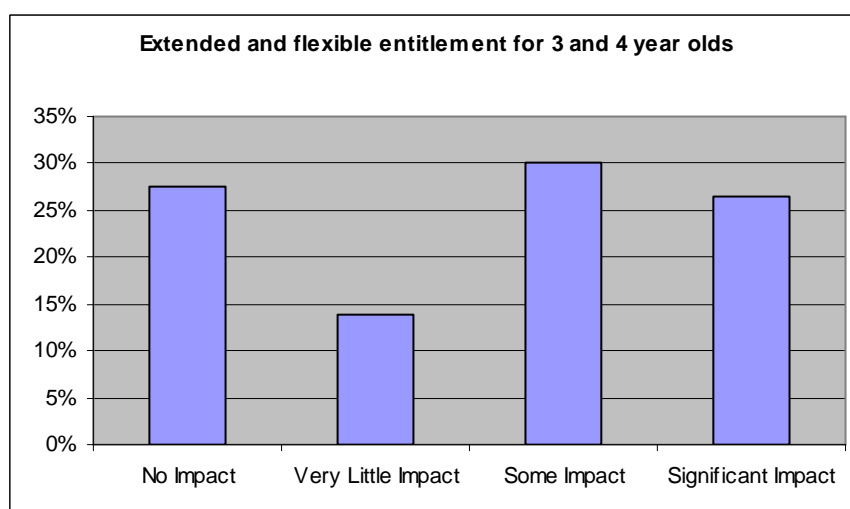
Of those that said the Ofsted Childcare Registers had had some or significant impact, the majority of these were Childminders. One of the main issues highlighted was related to the two registers and the need to pay two feeds. This reveals a misunderstanding of fee payment as the fee paid for the Early Years register also covers the Childcare register.

Comments include:

- More costs with Ofsted registers and the fees involved
- I am now charged more than twice as much for my registration to care for children over 5
- More paperwork that is considerably not all necessary. Experience doesn't seem to count anymore.
- This helps keep us current with Ofsted and more focused
- We used to have 0-8 now it is two registers 2 fees.

3e: Extended and Flexible Entitlement for 3 and 4 year olds

Chart 12 – What impact has the Extended and Flexible entitlement for 3 and 4 year olds had on your business?



55% of providers reported that the extended and flexible entitlement for 3 and 4 year olds had had some or significant impact on their childcare business. However 27% of childcare providers reported that it had not had an impact on their business.

Table 23 – Impact of the extended and flexible entitlement for 3 and 4 year olds by Early Years Setting sub type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	21	17%	16	40%	1	25%	2	8%	34	41%	0	0%
Some Impact	29	23%	14	35%	2	50%	3	12%	37	45%	2	33%
Very Little Impact	25	20%	5	13%	1	25%	1	4%	8	10%	2	33%
No Impact	50	40%	5	13%	0	0%	20	77%	4	5%	2	33%
Didn't Answer	5		2		0		2		8		1	

% of those who answered

When broken down into Early Years setting sub type, it is clear that the most impact has been on Pre-schools and Nurseries with 86% of Pre-schools and 75% of Nurseries reporting that the extended and flexible entitlement has had some or significant impact on their childcare business.

Pre-schools report that the extended and flexible entitlement has had a significant positive effect as it means more current children are taking up more sessions meaning more income to the business. This is enabling providers to then expand their business. Parents are now also choosing to send their child to the Pre-schools as the funded care is flexible meaning Pre-schools can provide a package to meet their needs. Some providers also report that their lunch clubs are now full and that it has provided a boost to service.

Comments include:

- Extended funding helps to increase income as parents use flexibility to increase hours at pre-school.
- Our setting was chosen to take part in the extended and flexible entitlement to 15 hours a week. This has had some impact in our setting in a good way as more parent/carers has the flexibility to choose more hours, and to suit their individual needs.
- Parents have been able to receive funding for extras we already provided such as lunch clubs and extended sessions with a resultant increase in uptake. Relatively few have used their whole 15 hours but many have benefited from the flexibility
- Parents are no longer charged for lunch clubs and this has reduced our bad debts

Nurseries report a significant negative impact on their childcare business with providers reporting that they are losing children to maintained nursery schools and children now doing less days but longer day meaning they have got other gaps to fill.

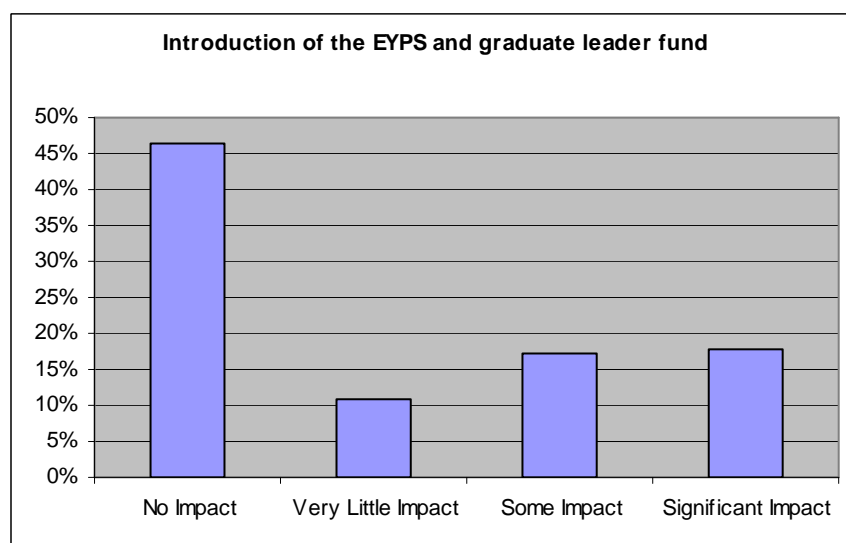
Comments include:

- The new 15 hours of funding is going to have an impact as I will lose my lunch club provisions. I do not think it has been thought through for people like me with a business so close to a school. It has a huge effect.
- Extended hours have sometimes meant parents have dropped a third day to use 12 hours over 2 longer days which left some spaces to fill.
- Extended Flexible Entitlement means more uptake of places but this leads to more term time only care which isn't easy to deal with as our staff are employed all year round

The least impact has been on Out of School Settings and Childminders with 81% of out of school settings and 60% of Childminders reporting that it has had little or no impact on their childcare business. This can probably be explained by the fact that Out of School settings and most childminders are not eligible for the funding.

3f: Introduction of Early Years Professional Status (EYPS) and Graduate Leader Fund

Chart 13 – What impact has the Introduction of EYPS and Graduate Leader Fund had on your childcare business?



46% of Early Years Providers reported that the introduction of EYPS and Graduate Leader Fund has had no impact on their childcare business.

Table 24 – Impact of introduction of EYPS and Graduate Leader Fund by Early Years Sub Type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	7	6%	18	44%		0%	3	11%	26	32%		0%
Some Impact	15	13%	13	32%	2	67%	5	18%	14	17%	2	40%
Very Little Impact	14	13%	3	7%		0%	4	14%	12	15%		0%
No Impact	76	68%	7	17%	1	33%	16	57%	30	37%	3	60%
Didn't Answer	18		1		1		0		9		2	

% of those who answered

The most impact was on nurseries with 76% of nurseries reporting that the introduction of the EYPS and Graduate Leader Fund had had some or significant impact on their childcare business. Nurseries report that this has enhanced their provision enabling them to improve the quality of their setting. They also reported that the supply cover available has really helped while staff have been training.

The least impact is on Childminders with 81% of childminders reporting that it has had little or no impact on their childcare business. Childminders report that if they were to complete the EYPS it would mean lots more paperwork and longer hours with less time to look after children to generate income, therefore they are not completing it.

Pre-schools have split views with 49% stating it has had some or significant impact and 52% stating that it has had little or no impact. Some Pre-schools report that this has been excellent in developing their leadership and providing

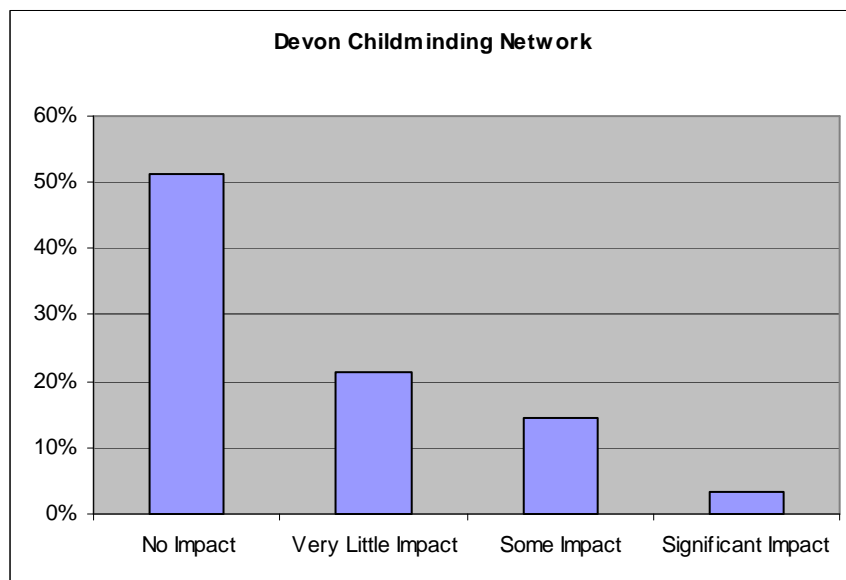
a higher standard of quality. However Pre-schools can only afford to pay staff low wages therefore no one wants to do it or they find it difficult to retain staff. Comments include:

- No one wants to do it. I personally don't want to do it. I have 2 outstandings under my belt and for me to do EYPS is five years training to do the same job!
- I am an EYP and the Pre-school has benefited from the extra funding available to them
- Staff who have been in position for 20 years are not prepared to train to graduate level
- Appointment of EYP in August 2008 increased our overall 'funding'. It also 'professionalised' our setting and made us very popular
- The financial costs involved in having a member of staff at a graduate level are not sustainable to a small setting. While funding exists to support making this happen, what happens after 2015 when we have an EYPS at great cost and not enough funds to keep paying them?

Question 3: Part 2: What impact have these local changes had/will have on your childcare business

3g: Devon Childminding Network

Chart 14 - What impact has the Devon Childminding Network had on your childcare business?



Just over a half (51%) of Early Years Settings reported that the Devon Childminding Network had had no impact on their business.

Table 25 – Impact of Devon Childminding Network by Early Years Sub Type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	7	6%	2	5%	0	0%	0	0%	0	0%	0	0%
Some Impact	32	27%	1	3%	0	0%	4	17%	4	5%	2	40%
Very Little Impact	34	29%	8	22%	0	0%	5	21%	15	19%	1	20%
No Impact	44	38%	26	70%	3	100%	15	63%	58	75%	2	40%
Didn't Answer	13		5		1		4		14		2	

% of those who answered

The most impact was on childminders as expected. However, still only a third of childminders reported that this had had some or significant impact on their childcare business. Some comments related to dissatisfaction by Childminders in the support provided due to the change of contract from DCMA to Trio Childcare.

Comments include:

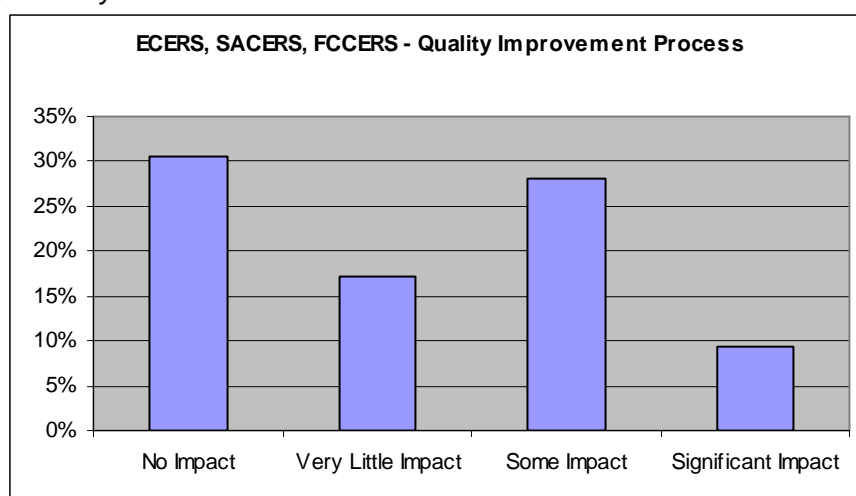
- Both Good and bad - It is nice that all childminder have been ascribed a level, I am sure that this would help parents in being able to make an informed choice regarding childcare and it may also work as an incentive for childminders to gain a level 3 qualification but I am sure that there are many childminders who may be adversely effected by this levelling process - e.g. Naturally good but only just started and overlooked as seen to be 'only' a level 1, before the parent sets foot in the door

- Network - feel less isolated. Easy to contact for advice and help
- DCMA Network was fantastic until their funding was removed and given to Trio staff who now are trying to be Jack of all trades and master of none
- Yes, it is practically non-existent from excellent quality and pastoral care under DCMA we are now practically ignored. We are low priority - there are few opportunities to exchange vital information - we no longer feel part of a network - vital training is not accessible to childminders unless they are specialists even though pre-school/nursery workers below level 3's can access this training! This may reflect counties view of childminding?
- No real support from Trio compared to DCMA network support
- Access to training is more difficult

The least impact is on Nurseries, Maintained Nurseries, Out of School settings and Pre-school Playgroups. However, interestingly 8% of nurseries, 17% of Out of school settings and 9% of Pre-schools reported that there had been some or significant impact on their childcare business.

3h: ECERS, SACERS, FCCERS – Quality Improvement Process

Chart 15 – What impact has the Quality Improvement Process, ECERS, SACERS or FCCERS, had on your childcare business?



30% of Early Years Settings reported that the Quality Improvement Processes had had no impact on their childcare business. Similarly 58% of Early Years settings reported that it had had some impact on their childcare setting. This could be due to the fact that not all settings have had an assessment. Therefore those that have had an assessment are more likely to report some impact whilst those that haven't are more likely to report no impact.

Table 26 – Impact of Quality Improvement Processes by Early Years Setting Sub Type

	Childminder		Nurseries		Maintained		OOS		Pre-School Playgroup		Unknown	
Significant Impact	1	1%	11	27%	0	0%	2	9%	14	17%	0	0%
Some Impact	16	16%	15	37%	1	33%	7	32%	44	54%	0	0%
Very Little Impact	21	21%	11	27%	0	0%	1	5%	14	17%	2	50%
No Impact	60	61%	4	10%	2	67%	12	55%	10	12%	2	50%
Didn't Answer	32		1		1		6		9		3	

% of those who answered

The most impact has been on Nurseries and Pre-schools with 71% of Pre-schools and 64% of Nurseries stating that the Quality Improvements Processes (ECERS) had had some or significant impact on their childcare business. Settings mainly reported that they thought it was a good experience and helps develop their setting. However the availability of funding for new resources to meet the action plans is an issue for some.

Comments include:

- ECERS/Quality Improvement - ECERS has made us all aware of the impact of the environment on our children and has made us renew room layouts/interactions/equipment etc
- ECERS - although a new concept, it was very useful in helping to take a fresh look at the setting to appreciate what improvements were required and which we are now putting into place - a well thought out concept
- ECERS was disappointing. We only rated 5.4 and the staff were demoralised because the large majority of points lost were due to the building - something we could not change and re-scored us. We then

achieved 6.5 - significantly better. Community pre-schools cannot be compared in the same way as purpose built nurseries

- It is demoralizing to be continually checked upon. - EY Audit, Financial Health Check, Welfare Check, ECERS, Ofsted! Each individual has a 'different' new idea for us to incorporate into our setting. We would prefer to be meeting the children's needs rather than the needs of these individuals.
- Extra monitoring mechanisms (in addition to Ofsted and Devon County Advisor Visits) always result in extra work for staff since all work to different criteria. ECERS seemed very geared towards nursery-style settings for much of its criteria rather than sessional providers with part-time staff working in a rented space

The least impact has been on Childminders, Maintained Nurseries and Out of School with 81% of Childminders, 67% of Maintained Nurseries and 60% of Out of School settings reporting that it had had little or no impact on their business. This is probably because they have not had an assessment.

Many settings also reported that they had not heard of the Quality Improvement Processes, ECERS, SACERS or FCCERS.

Other Comments

Many other providers reported their concerns about the Single Point of Entry commencing in September 2010 and the impact it is going to have on their childcare business.

Many other providers, mainly childminders, reported their issues with the increasing amount of paperwork they are having to complete. This is taking more time which they are not getting paid for and it means less time hands on with the children.

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Appendix 1

Copy of questionnaire sent to Providers. Question 1, 2, and 3 were sent to all Early Years Settings. Schools and Children's Centres were only asked Question 1.

Childcare Sufficiency Assessment 2011 Views of Childcare providers

Name of setting	
Postcode of setting	

Question 1.

Thinking about right now – do you think there is enough childcare in your area? If not, what's missing and why?

Q1.	Is there enough childcare in your area?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Don't Know
If you answered no to question 1 please answer questions 1a-1i below, if you answered yes to question 1, please go to question 2				
1a	What type of childcare is needed? <i>(tick all that apply)</i>	<input type="checkbox"/> Childminders <input type="checkbox"/> Home childcarers <input type="checkbox"/> Pre-schools <input type="checkbox"/> Day Nurseries <input type="checkbox"/> Private Nursery Schools <input type="checkbox"/> Breakfast Clubs <input type="checkbox"/> Independent School Nurseries	<input type="checkbox"/> After school clubs <input type="checkbox"/> Holiday Playschemes <input type="checkbox"/> Youth provision <input type="checkbox"/> Sports provision <input type="checkbox"/> Specialist Childcare for disabled children and young people	
1b	Where is it needed?	(Town/village)		
1c	For what age of child? <i>(please tick all that apply)</i>	<input type="checkbox"/> 0-2 <input type="checkbox"/> 3-4 <input type="checkbox"/> 5-7	<input type="checkbox"/> 8-10 <input type="checkbox"/> 11-14 <input type="checkbox"/> 15-17 (disabled young people)	
1d	What times are childcare needed? <i>(please tick all that apply)</i>	<input type="checkbox"/> Before 8 a.m. <input type="checkbox"/> 8.00-9.00 a.m. <input type="checkbox"/> 9.00 a.m. -1.00 p.m	<input type="checkbox"/> 1.00–3.30 p.m. <input type="checkbox"/> 3.30–6.00 p.m. <input type="checkbox"/> After 6.00 p.m.	
1e	What evidence do you have that parents need more childcare in your area?			
1f	Is the childcare affordable to parents in your area?	<input type="checkbox"/> Yes <input type="checkbox"/> Yes with Childcare Tax Credit support	<input type="checkbox"/> No <input type="checkbox"/> Don't Know	
1g	Is there sufficient provision for disabled children?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Don't Know
1h	How would you rate the quality of childcare in your area?	<input type="checkbox"/> Very Good <input type="checkbox"/> Good <input type="checkbox"/> OK	<input type="checkbox"/> Weak <input type="checkbox"/> Very Weak	
1i	Any other comments about the childcare in your area?			

Question 2.

Personal response for your childcare setting:

Looking back – what has been the impact of the recession on your childcare business over the last year?

(please detail here)

Looking forward – what are your future plans over the coming year?

(please detail here)

Question 3.

What impact has these national legislation changes had/will have on your childcare business?

3a	Introduction of EYFS	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact
3b	Extended Services in schools	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact
3c	Introduction of 2 year old funding	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact
3d	Ofsted childcare registers	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact
3e	Extended and flexible entitlement for 3 and 4 year olds	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact
3f	Introduction of EYPS and graduate leader fund.	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact

For those areas which either you have recorded have had or will have significant impact, please describe the impact in the box below

a) What impact have these local changes had/will have on your childcare business?

	Devon Childminding Network	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact
	ECERS, SACERS, FCCERS Quality Improvement Process	<input type="checkbox"/> No impact <input type="checkbox"/> Very little impact	<input type="checkbox"/> Some impact <input type="checkbox"/> Significant impact

For those areas which either you have recorded have had or will have significant impact, please describe the impact in the box below

Thank you for your comments, please return in the freepost envelope or alternatively email to childcareinfo@devon.gov.uk

Appendix 2

District Co-ordinators notes for use at combined network and OUTs meetings for discussion and consultation

CSA Questions for Providers Combined Locality Network Meetings February – March 2010

Discussion question in Learning Community Groups voted on

Q1. Thinking about right now – Do you think there is enough childcare in your area? If not, what's missing and why?

- Type of childcare
- Times of childcare
- Location of childcare
- What parents need or want.
- Age range
- Provision for disabled children
- Affordable childcare
- Quality childcare

Flipchart discussion: Write the question on the flipchart.

- Types of childcare, if no-one wants to start the ball rolling it may be worth by suggesting a couple and see how people react. Once started, please try and cover all the areas of provision including childminders, breakfast clubs and Saturday clubs.
- Location of childcare, try to get people to be specific and local. If they want it in the school, ask which school and record the name.
- What parents need or want, it may be worth asking if anyone has done their own consultation? Do they talk to parents on an informal or formal basis?

Once the discussion is over, please ask the group to state

Which type of childcare is most needed or missing in the area?

What time is childcare lacking the most?

Which location across the Learning Community is childcare required the most?

What do parents need or want the most?

Record on flipchart.

Personal response

Q2.

- a) Looking back – what has been the impact of the recession on your childcare business over the last year?
- b) Looking forward – what are your future plans over the coming year?

This will be done by issuing post it notes to each person, ensure that you have the questions written on a flip chart as well as a piece of paper. Read

the question out loud, don't assume everyone can read!! Remind the group that this is looking at their personal setting.

If they work in more than one setting, it would be interesting to compare them, has it affect one and not the other.

If any other comments are raised record them on the flip chart.

Poster comments

Q3.

b) What impact has these national legislation changes had/ will have on your business?

- Introduction of EYFS
- Ofsted childcare registers
- Extended Services in schools
- Extended and flexible entitlement for 3 and 4 year olds
- Introduction of 2 year old funding
- Introduction of EYPS and graduate leader fund.

This question will be posed to the whole group and then a heading placed on a different piece of flipchart, the last flip chart will say 'Other'. The group should be allowed time to write their comments and encouraged again during the refreshments break reminded to add their comments. If they don't want to write directly onto the flipchart then they can use post-its. The information given can be anonymous unless they wish to state where they are from.

c) What impact have these local changes had on your childcare business?

- Devon Childminding Network
- ECERS, SACERS, FCCERS – Quality improvement process

This will be a personal response; again this can be written directly on the sheet or put onto post it notes.

Appendix 3 – Where is childcare needed?

Axe Valley

Axminster	2
Chardstock	1
Colyton	1
Hawkchurch	1
Kilminster	1
Lyme Regis	1
Seaton	1
Shute - within walking distance of school	1
Uplyme	1

Barnstaple

Bratton Fleming	1
-----------------	---

Beacon

Stoke Hill	2
Whipton	1

Bideford

Appledore	2
Bideford	2
East the Water	2
Hartland	1
Instow	1
Northam	3
Westward Ho!	2
Woolsery, Bideford	1

Braunton

Braunton	3
Croyde	1
Georgeham	1

Central & Chestnut

Clifton Hill	1
St Leonards Exeter	1
St Loyes, Exeter	1
Topsham	1

Chulmleigh

High Bickington	1
Witheridge	1

Clyst Vale

Clyst Hydon	1
Clyst St George	1
Clyst St Lawrence	1
Clyst St Mary	1

Langford	1
Rockbeare	1
Silverton	2
Talerton	1
Thorverton	1

Culm Valley

Cullompton	3
Culmstock	1
Hemyock	1
Holcombe Rogus	2
Kentisbeare	1
Westleigh	1

Dartmouth

Blackawton	1
Dartmouth	1

Dawlish

Dawlish	1
Exminster	1
Kenn / Kennford / Shillingford / Clapham / Underdown / Dunchideock Areas	1
Kenton	2
Starcross	1
Westcliff school	1

Exmouth

Exmouth	2
Littleham area, Exmouth	1
Withycombe area	1
Woodbury	1

Holsworthy

Bridgerule	1
Holsworthy and surrounding area	1
Pyworthy	1

Honiton

Honiton	2
Stockland	1

Ilfracombe

Ilfracombe	1
Lynton	1
Woolacombe	1

Ivybridge

Ermington	3
Ivybridge	4
Modbury and surrounding area	1
South Brent	2
Ugborough	1
Yealmpton	1

Kingsbridge

Aveton Gifford	1
Charleton	1
East Allington	2
Kingsbridge	6
Loddiswell	1
Salcombe	1
Slapton	1
Stokenham	1
West Alvington	1

Newton Abbot

Kingsteignton	3
Newton Abbot	6

Okehampton

Boasley	1
Bratton Clovelly	1
Chagford	1
Hatherleigh	2
Lewdown	1
Okehampton	1

Ottery St Mary

Feniton	2
West Hill	2

Sidmouth

Colaton Raleigh	1
Newton Poppleford	1
Sidmouth	4

South Dartmoor

Bovey Tracey	2
Heathfield	3
Illesington	1
Moretonhampstead and surrounding villages	1
Widcombe and around the moor	1

South Molton

Bishops Nympton	1
Chittlehampton	1
North Molton	1
South Molton	2

Tavistock

Horrabridge	3
Princetown	1
Tavistock	2
Woolwell / Roborough	3
Yelverton	1

Teign Valley

Chudleigh	2
Doddiscombeigh	1
Teign Valley	1

Teignmouth

Bishopsteignton	1
Shaldon	1
Teignmouth	1

Tiverton

Bickleigh	2
Bampton	1
Tiverton	3
Tiverton area - small villages	1

Torrington

Horwood	1
Lovacott	1
Monkleigh	1
Newton Tracey	1
Shebbear Area	1

Totnes

Broadhempston	1
Diptford	1
Harberton / Harbertonford	3
Marldon	1
Stoke Gabriel	2
Totnes	4

West Exe

Exwick	2
Ide	2
Longdown	1
Redhills	1
St Thomas	1
West Exe	1

Other Comments

Across the area	2
City Centre	1
Exeter	2
Local area	2
Rural Areas	1
Surrounding villages	1
Town	13
Village	17
Village for Pre& Post school	1

Appendix 4

Comments from providers about what age child care is needed for

Age

- ASC take from 4 years up, pre-school saying there is need for 3 year olds after pre-school finishes.
- Parents want care from 2 years, some pre-schools can't offer this
- 2 ½ year olds may be need provision
- Over 12 years olds – sometimes they don't want to access b/c asc because of image (going back to pre-school)
- 13-16 provision required
- Age 11-14years ASC (Seaton and Chardstock)
- ASC Chardstock for pre-school children
- Gap: 11-14 youth provision not available (Barn, Ilf)
- ASC for older children (secondary age) – after school activities
- C/M takes up to 11year olds
- Puffins up to 12yr olds
- Out of school care. Secondary ages – nothing after pre-school. Same for early years
- Holiday clubs. But not for 8+. But expensive
- Trying to get care for older children
- Older care – not enough care – 13 years plus
- Under three's. Cheap places to leave them. Affordable childcare
- Silverton - Vacancies for 3 and 4 year olds, possible gap for childminders
- Need for breakfast 5-11 years
- Challenging Behaviour – CEDA – lack of other provision. 5+, out of area
- Cheriton Fitzpaine – Early Years
- Babies – now coming at older age – as extended maternity leave 8 months plus.
- Baby care needed. Not enough childminders. Most are full
- Care from age of 2 (culm) – forcing one size fits all. Local needs_Fear - Pressure from school – one in take – more info
- Parents who working but limited childminders in area
- Baby care
- Central Exmouth 3-11years – After School Clubs and Breakfast Clubs
- Deferring into school from pre-school could cause training issues for staff in FS
- 0-4 year olds in Exmouth – Childminders are all full
- Early Age provision for Exmouth – 1 setting being asked to take younger children
- Between Sidmouth and Honiton – Nothing for under 3's
- Lack of baby places – more for younger age range, Full day care
- 11+ age range – Lynton – lack of transport
- Gaps – Baby Care
- Being asked to take 2 year olds – no room!
- All age groups – more over 5's
- Not enough childcare for babies – Sidmouth
- Lack of appropriate facilities for babies
- NP – Not enough childminders – under 3's
- Sidmouth – Under 3's
- Between Sidmouth and Honiton – Nothing for under 3's
- Sidmouth – 2 childminders left and left need for under 2's. Lack of childminders
- 11-16 years age group
- Lacking: Under 2 places
- For West Exe feel area is provided for 0-5
- 8+ needs more for age range and especially SEN
- Big gap for children / young people 11+ (when left Primary School)
- Gap below 2 ½ years children
- Age Range – Under 3's
- 2year olds?
- One intake will lose the 4yrs so looking to take 2years
- Provision for older children – is there enough
- 10-14 year olds – lack. Don't want to be in 'childcare'. Childminder take up some of the slack

Appendix 5

Comments from providers about what time care is needed

Time

- Parents saying no space in full day settings in area
- Axminster parents asking especially for pre-school to open longer in afternoon where presently only morning.
- Noticed more women needing to work, so above comment is across Axe Valley
- Early Evening/weekend (particularly teenagers). Bank holidays and as a tourist spot – so need cover at all times. Overnight care
- Before 8 in Beer – parents are asking for care from 7am – use of childminder then comes in
- Landkey (Barnstaple) – longer opening hours e.g. now open till 6.30 pm – more flexible requests. Not much request for Sat/Sun (Nursery)
- Always want longer hours – not sustainable
- Shift workers needing flexible times
- Childminder – providing care for shift work
- ASC – until 6.30pm
- Secondary school age – after school care
- Early Morning starts needed
- Ambulance staff need longer days – hospital has a big impact
- Requests for Saturday care – Kinderkare and CM
- Puffins staff asked to babysit on Saturday
- No requests for Sunday care – not good for children
- Request for until 7pm
- Asked to shift days – flexible even if just for one week
- Issue flexibility of staff and space.
- Nursery prefers set days
- Times for pick up – can't get there
- Drop off and run
- Overnight care/weekend – not enough, all weekend
- Bank Holiday care.
- Times – holiday care – don't start early enough or finish late enough
- Breakfast – in some areas is required, depends what school or childminders offer
- Silverton - Meets parents needs – but consulting
- Informal childcare arrangements
- Not great take up for holiday provision has run in past
- Afternoon sessions
- ASC – until 6.30pm
- Secondary school age – after school care
- 9.15 – 11.45, already in place,
- No Breakfast club – Thorverton, for all ages
- Crediton – covered – only weekdays not weekends
- Before school – dropping off hard – Childminders struggle to link with more than 1 school.
- Rural pre-school struggle to meet growing need of parents for possible all day care
- Brixington Pre-school finishes at 3 pm and school finishes at 3.20pm – Issue
- Demand for holiday/asc/bc – not there
- Holiday care missing – more choice for BC/ASC
- Nothing in Dunkeswell for OOS
- St Johns now offering 9.00-3.00 two days a week
- Limited on hours able to operate, generates a waiting list
- Some parents requesting longer hours – restricted by venues
- Before and After School 8-6
- NP – 7am – 6pm
- Adequate provision
- Bampton- No wrap around
- Stoke Gabriel's – 2 full days only
- Always want longer hours – not sustainable
- Shift workers needing flexible times
- Out of hours

- early mornings from 6am
- half term holidays
- Saturdays
- maybe Christmas
- From 6am
- Weekends / Evenings
- Most providers open at 7.45 – but report not been asked for earlier starts
- West Exe 11-13yrs After school
- Overnight Care
- Childminders – Parents requested Saturday's
- 8am start – schools need early morning start. Issue re childminders not being able to fill the space for a morning session. – Parent asked
- Evening care – childminders working until 8.30pm/9pm

Appendix 6

Comments from providers about affordability of childcare

- Parents cutting services
- Parents not paying - not had that before! Using HV's to access funding.
- Not really advertising to parents (DC mentioned factsheets)
- 15 hours will be good – use of full funding will make it more flexible for parents. Support for disadvantaged some parents just use funded sessions.
- 15hours increase parents using all their funding and not paying for additional hours such as pick up from playschool
- Bideford – Not enough, NMW – gap between Qualls and unquals, passed onto families
- Bigger take up of childcare vouchers
- Cost – Tax credits
- Costs
- Creative around charging for 'hours' so we can help families in areas – no sessions flexible
- Rates per session – more grants
- Quality and affordability – Don't go together
- Cost implications. Affordability. – Families can afford into village – also effect settings sustainability. Devon wages and expensive housing
- EYEF - £3.54 is struggle to improve quality and therefore wages on this funding in a rural pre-school
- Exeter – Parents say they want H/C but not many using it – affordability
- ASC's Parents just want to pay for i.e. an hour and don't realise the implications – impact of recession ASC charge per session
- ASC – Affordable – difference in prices – leading to using informal childcare being used
- Need the use of hourly rates
- Early Entitlement will reduce quality. Level 3's costing more (15 hours) – not raising quality
- Expensive if you've got a big family
- Expensive, especially for more than 1 child
- Registration for clubs for over 8's and claiming childcare.
- Funding for 2 year olds
- Lack of info around childcare voucher
- Lack of taking up tax credits makes provision expensive for some families.
- It can mean for certain areas that are less affluent affordability is a problem (this may be an after school problem)
- Pre-school – Nursery find that parents do use Child Tax Credits
- Not all of parents using funded free hours allocated for 3 year olds
- Recession impacted on paying
- CTC – not arriving on time – needs to be paid to childcare
- Parents creating debts with nursery
- Silverton – Affordable support, hourly rate will impact EYE
- Cost – Tax credits
- Too cheap!!

Appendix 7

Comments from providers about the sufficiency of provision for disabled children

- Limitation of buildings
- Safeguarding issues especially with nappies/staffing
- Provision for disabled children- Beacon Heath
- Sufficient in Bideford
- Provision for disabled children
- Money issue for childminders
- Not ofsted registered
- Speech and language
- Silverton – sufficient – signposting to relevant
- Adaptations taking place to take children
- Need more provision for special needs children- playschemes without parents
- Funding an issue (having to fight hard to get it to ensure you are inclusive)
- Appear to be clubs for disabled (Millwater).
- Not enough choice – have to travel o/s of area (Exeter)
- Need more provision for special needs children- playschemes without parents
- Bampton!! Poor at school
- Settings are inclusive
- Identified problems on Saturday / weekend provisions for older children
- Physical access around disability
- Rural transport for young people with disability
- Isolation
- More Abby – training / information
- Need support from Behavioural specialist
- Inclusion Support more is needed for Out of School Clubs
- Support for parents for SEN – generally feel parents do not access groups / childminders

Appendix 8

Comments from providers about the quality of childcare

- We think we're fab!!
- ECERS useful – not sharing with parents yet, think they won't care
- Babies – people check the Ofsted inspections – CM's mainly
- Quality: - space/outdoor space
- Bideford – Can't comment, excellent feedback
- Location not bothered about quality
- Don't worry about being a place of learning.
- Ofsted – parents don't check it out – childminders, nurseries – parents are aware. Word of mouth works better
- Silverton – CM's good provision, consultation
- Differs from place to place
- All Amazing!
- Good across the area
- Quality: - space/outdoor space
- Word of mouth
- ECERS to prove quality – advertise / sell yourself
- Affording to improve / willing to approve – combat the 'one more thing'
- C.P.D courses and where are they?
- Paying staff to go on courses and then paying for cover.
- Courses in holidays / evening / weekends as quieter – flexible/childcare.
- Quality doesn't make a difference to parents' choice. Never has a request from parents for Ofsted reports