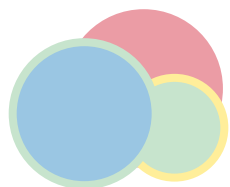




Devon Childcare Sufficiency Assessment March 2011

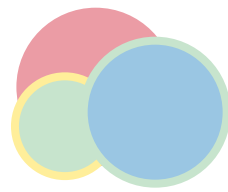




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Introduction



The Childcare Act 2006 expands and clarifies the vital role local authorities like Devon County Council play as a strategic leader in facilitating the childcare market. It focuses on partnership working in the private, voluntary and independent sector of the market to provide sufficient, sustainable and flexible childcare which is responsive to parents' needs.

Section 11 of the Act gave local authorities a duty to undertake a [Childcare Sufficiency Assessment](#) every three years. Our first Assessment was published in March 2008. Following this we developed a strategy for ensuring sufficient childcare in Devon (Section 6 duty of *The Childcare Act*).

Through the strategy and implementation of action plans at local level there has been significant development in the provision of new childcare places to fill gaps, and, also improvements in quality skills and training. Since March 2008 there have also been significant changes in the way the provision is regulated and inspected through the introduction of the [Early Years Foundation Stage](#) and [Ofsted Childcare Registers](#) in September 2008.

Other significant changes include:

- universal roll-out of the free entitlement for three and four year olds from 12.5 to 15 hours per week delivered more flexibly - September 2010
- the introduction of the Early Years Single Funding Formula, for funding the free entitlement for all three and four year olds - September 2010
- the two-year old pilot providing free part-time places for the most disadvantaged two year olds - April 2009.

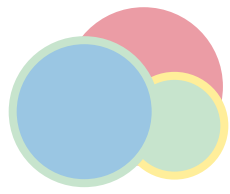
Childcare has also played an important part in the provision of [Extended Services in and around Schools](#). Devon County Council met the government target of providing access to wrap around childcare in response to demand through every primary school in Devon and a 'safe place to go' in secondary schools. In achieving this target there has been a strong drive for developing childcare places on school sites, particularly breakfast clubs, but also to develop links with the Private, Voluntary and Independent (PVI) sector providers working with schools.

The work to ensure childcare sufficiency, has taken place in a fast changing economic environment. This has affected the demand for childcare and also the sustainability of providers operating in the childcare market. It is in the context of all these changes that our second Childcare Sufficiency Assessment has been created.

As required by legislation and regulations this Assessment includes:

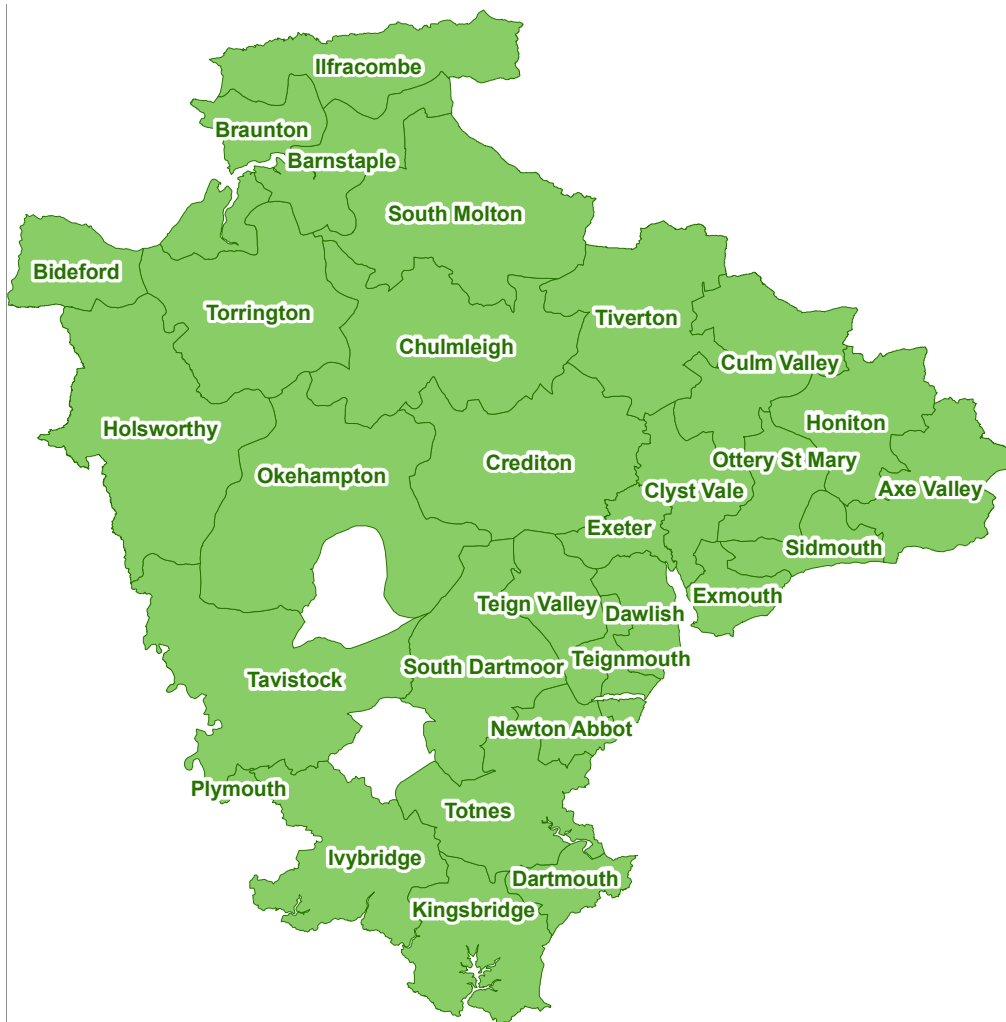
- the demand for childcare
- the supply of childcare
- the analysis of the gap between demand and supply at sub-local authority level which for Devon is Learning Community Level as used in the first assessment.

When looking at the supply of childcare we have assessed the level of provision by each type of childcare and also other factors which are relevant to deciding whether childcare is suitable and sustainable. Ofsted inspection reports, quality assessments and the skills of the workforce are all examples of likely indicators influencing sustainability.



The gap analysis seeks to identify where supply is not meeting demand and any specific requirements of groups of parents.

Map 1 Devon's Learning Community Boundaries

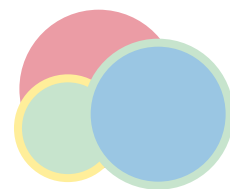


Source: Devon County Council July 2010

Devon County Council selected Learning Communities as the most appropriate sub-local authority area for the assessment of childcare demand and supply. Each Learning Community comprises at least one secondary school or community college along with its feeder primary schools and any specialist maintained schools in the area. This enables the analysis of each area to take into account the primary school designations (catchments) as natural community boundaries for children and families.

The following stakeholders were involved in collecting evidence for the Assessment.

- Parents of children aged 0-19 years.
- Childcare providers, schools and children's centres.
- Children and young people.
- Employers.



Parents of children aged 0-19 years

The research organisation Hemsall's Consultancy Ltd, working with Morgans Research Ltd was commissioned in December 2009 to undertake a research project on the views of parents on childcare in Devon. The project was based on a telephone survey of 1,750 parents and carers of children aged 0-14 years (up to 18 years for disabled children) and a face to face interviewer-led survey of 250 parents and carers in targeted locations across the county which took place in March 2010 with targeted groups. Groups included Black Minority Ethnic parents and carers, parents and carers of disabled children, young parents, service families and single parents. Targeted locations included rural and coastal locations.

In addition to the Hemsall's work, a more qualitative approach to research was undertaken to seek the childcare views and experiences of parents with children who may have additional needs, or parents who tend not to have their voice heard. This looked at what barriers to the take-up of childcare exist in Devon and whether what is currently available meets their needs.

A mixed method approach was used. In addition a review of research, policy and good practice literature (to compare the results obtained from this consultation) was completed. Methods included a mix of focus groups, individual interviews and open-question questionnaires. Practitioners from partner organisations also assisted in the collection of data, using their knowledge of their field and their existing relationships.

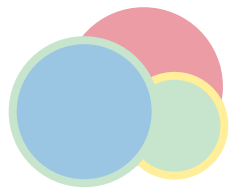
The questions used were designed to cover:

- take-up
- flexibility
- accessibility
- quality
- choice and satisfaction
- affordability
- knowledge and information gaps
- specific requirements the parents may have for childcare.

Given the economic climate of recession at the time of the research, when possible, questions were asked about the impact of market conditions, such as prices rising or lowering. Questions were also asked to parents of children under five about up-coming policy changes (at the time of writing); that is both the 'stretch' of the free Early Education Entitlement for three and four year olds and the Rose Review (2009) recommendation for children to enter reception class at school in the September immediately after their fourth birthday, as well as the services and support provided by Devon Children's Centres. In some instances, it was not possible to ask all of the questions, particularly with parents who have English as an additional language due to the extra time needed to explain the research and ensure understanding.

Ninety-five individual parents participated in this consultation. As this was a targeted consultation to ensure parents who can be missed have their say, participants were purposely selected, largely by the partner organisations to this research. Additionally approximately 66 parents of children at special schools were asked about their childcare needs.

A total of 2,161 parents were contacted throughout the process.



Childcare providers, schools and children's centres

Two methods were used to consult with childcare providers. During February and March 2010 a questionnaire was sent out to all schools, children's centres and early years settings. Early years settings were asked additional questions to schools and children's centres.

To capture the views of more childcare providers and gain some qualitative data, it was decided to consult with providers at Network Meetings which took place at various times and in various locations across Devon during February and March 2010. These are traditionally well-attended as they are used to disseminate essential information to providers.

The local district co-ordinator from the Early Years and Childcare Service facilitated the discussions and encouraged feedback. Three open-ended questions were used to spark debate, invite honest feedback and encourage providers to begin thinking about the shape of their local childcare market in terms of supply, demand, parental preference and filling the gaps.

Children and young people

Children and young people were consulted through schools and childcare settings.

During February and March 2010 a questionnaire was put on the Early Years and Childcare website for schools to get children in their school to complete and return. Some questionnaires were also given to the Youth Service over the summer for them to ask children who attended their sessions to complete.

We also worked with the Participation and Democracy Development Team to conduct face to face consultations in settings asking children about their experiences. A variety of types of settings took part at different locations during May and June 2010.

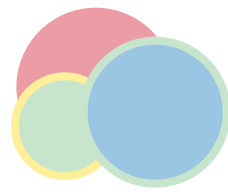
In October and November 2009, a consultation was carried out with pupils of Devon's special schools. The consultation with the children was carried out using appropriate discussion events and games, with assistance and extensive input from the children's teachers and other specialist staff.

A total of 601 children aged 3 to 17 years old were consulted throughout the process; 171 children were consulted using the questionnaire, 314 children were consulted through the face to face workshops and 116 children were consulted using the worksheets sent to the special schools.

Employers in Devon

The Market Research Group based at Bournemouth University was commissioned to undertake a study of employers in Devon. The Experian B2B Prospector Business Directory 2010 was used to create a sample of at least 10 large businesses, 20 medium sized businesses and 20 small businesses and to segment the organisations by location, size and industrial sector.

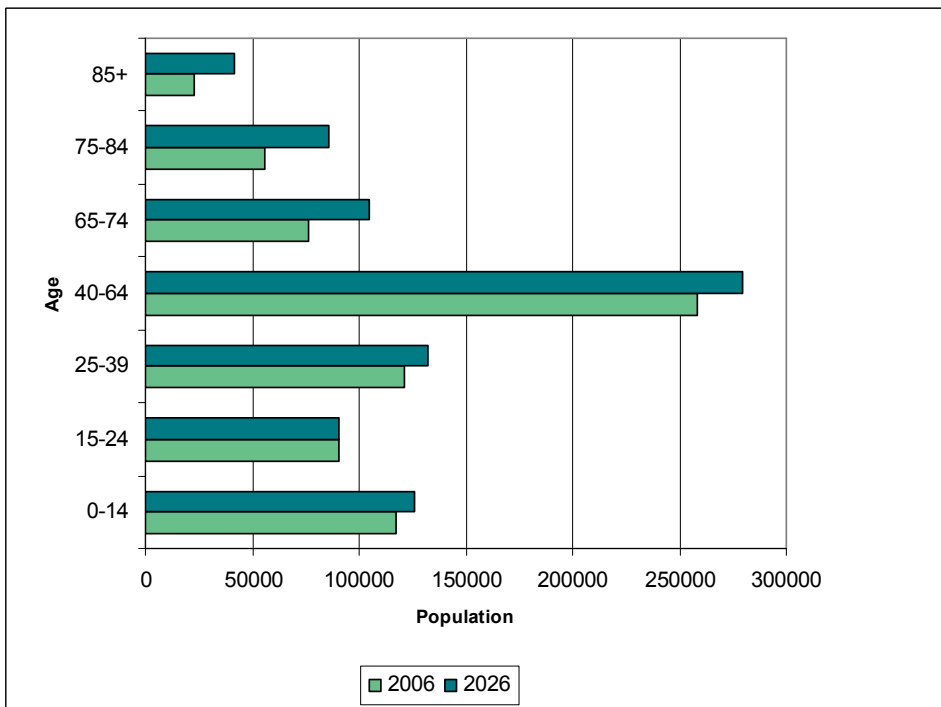
Organisations in the sample segments were randomly selected, contacted and the person responsible for Human Resources or Personnel, or the owners of small businesses were identified. In total respondents from 55 organisations participated; 51 participated in a structured telephone interview, with responses being recorded, where permission was granted, and entered into an electronic software package by the interviewer and four through a self-completion questionnaire submitted by email.



Population

In 2009 the total population of Devon was 771,871. The age structure of Devon is quite different to that of the UK. There is a lower proportion of people in the younger, particularly young working age, age groups and a far higher proportion of people aged 50 or older¹. The average age² of someone living in Devon is 43 years compared to 39.3 years for the UK as a whole.

Chart 1: Population Growth Predictions



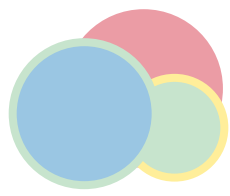
Source: Office for National Statistics (ONS)

Population projections forecast that over the 10 years from 2009 to 2019, Devon will see:

- growth in both the working age and total population. This will be migration led - each year around 0.9% of residents migrate out of Devon, while the equivalent of 1.05% of the resident population migrates in
- significant growth in the number of people aged 65 and over
- growth in the number of older workers, aged 50 to 60, and those aged 25 to 40
- a decline in the number of people aged 40 to 50
- a decline in the number of new entrants to the labour market – including a 9% fall in the number of 15 to 19 year olds
- a likely continued fall in the numbers of migrant workers entering Devon. From 2003/04 to 2006/07 the numbers of migrant workers rose rapidly, from 1,250 each year to 3,750 each year. Data suggests that the international flow of migrants seeking work in Devon has started falling.

¹ ONS – Mid year population estimates 2008

² Average age is calculated from population estimates for single years of age. Data is only provided for those up to 89 years old. People aged 90 or older are grouped together. It is assumed the average age of this group is 95.



The total population across Devon has risen by just under 4% since 2007. Table 1 shows the percentage increase in total population across each district with Exeter showing the greatest increase (7.2%) and Teignbridge and East Devon showing the lowest increase (2.3%).

Table 1: Percentage increase in total population since 2007

	Population 2007	Population 2009	% increase in population
National		59,608,200	
DEVON	742,911	771,871	3.9%
East Devon	132,548	135,636	2.3%
Exeter	113,214	121,323	7.2%
Mid Devon	74,726	78,806	5.5%
North Devon	95,121	97,584	2.6%
South Hams	85,921	89,634	4.3%
Teignbridge	126,758	129,659	2.3%
Torrige	62,899	65,324	3.9%
West Devon	51,318	53,905	5.0%

Source: South Devon Health Informatics Service (FHSA)

Nationally, 23.7% of the total population is under the age of 19 years old. In Devon, this is 21.2% of the total population. Mid-Devon has the highest percentage of under 19 year olds (23.1%). The lowest levels are seen in East Devon where just 19.1% of the total population is under 19 years old.

The table below shows the proportion of the population in each age group across the districts as compared with Devon and nationally. Devon-wide the proportion of children in all age groups up to 14 years was lower than those seen nationally and this is reflected in all districts. For 15 to 19 year olds, Devon-wide the proportion of the population was also lower and this is reflected across all districts, except Exeter where the proportion of this age group is higher than seen nationally, probably due to the presence of the university.

Devon has a slightly lower proportion of children aged between birth and five than nationally, although the percentage in the county is forecast to rise. Numbers of younger children are slightly lower than for older children, increasing from just over 7,000 under the age of one, to just over 9,000 children aged 15. This is due to a general decline in the birth rate between 1998 and 2003 but also due to migration in to Devon. The largest number of people moving to Devon are middle-aged who bring their children with them.

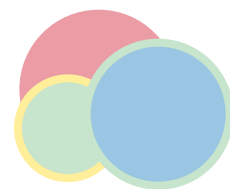
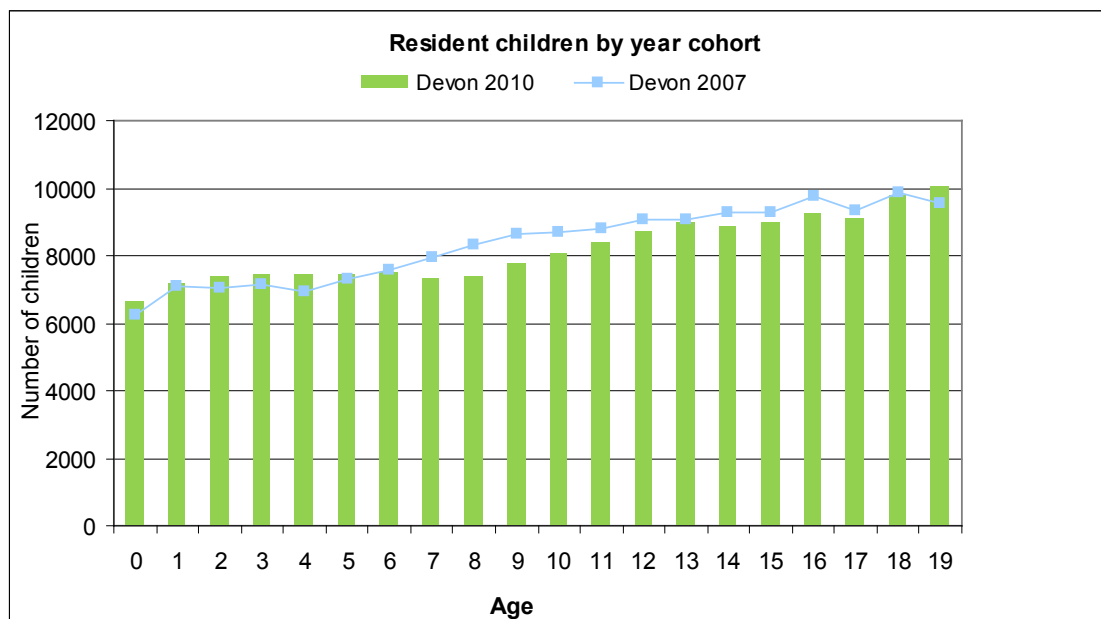


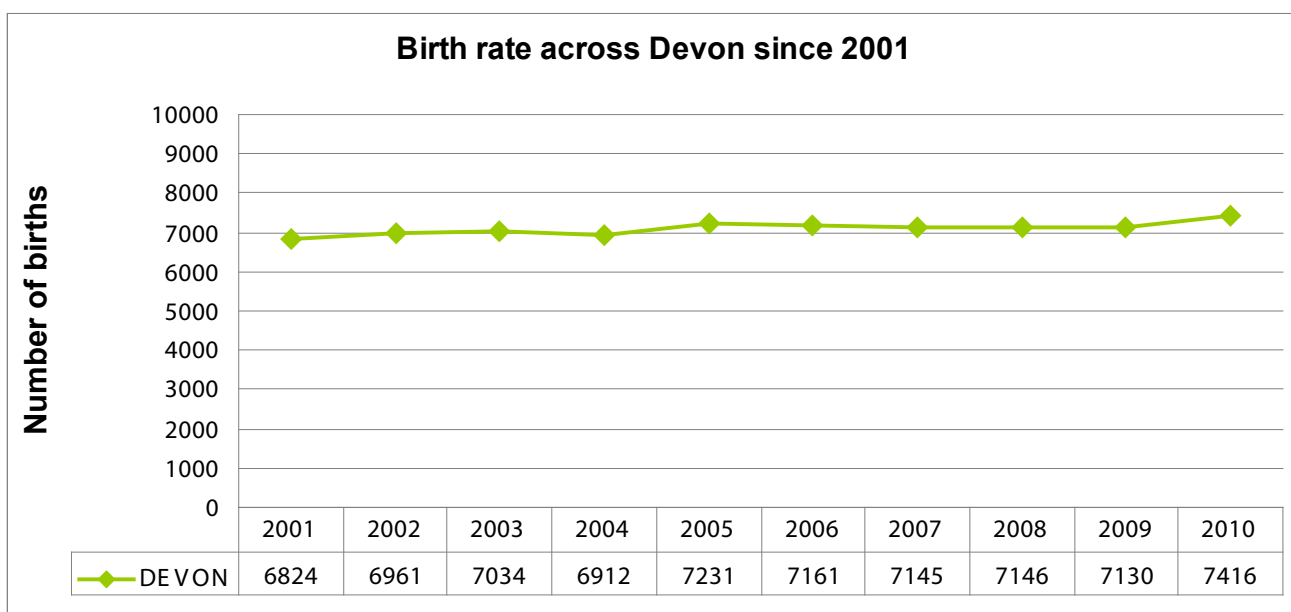
Chart 2: Resident population of children as at June 2010



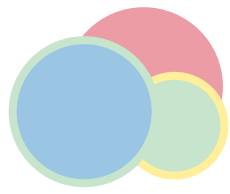
Source: South Devon Health Informatics Service (FHSA)

Chart 2 shows detail by age cohort of the number of resident population under the age of 20 years across Devon. The population of children in Devon by age cohort shows a decline in the numbers of children from a maximum of nearly 10,000 per year for children aged 18 years, born in 1989. The steepest decline is seen for children aged between 7 to 12 years, born between 1998 and 2003, with a loss of over 1700 children per cohort over that period. Since 2003, the number of births has risen slightly and leveled off at around the 7,000 mark. However, in 2010 there has been a slight increase in the number of births (4%) with the highest levels seen in the last 5 years.

Chart 3: Birth rate Devon-wide since 2001



Source: South Devon Health Informatics Service (FHSA)



Deprivation

The indices of deprivation are the Government's standard measure of deprivation at a local level. They provide scores and rankings for each of the 32,482 Lower layer Super Output Areas (LSOAs) in England, as well as summaries for upper tier authorities and local authorities. A ranking of 1 represents the most deprived and a ranking of 32,482 the least deprived.

The indices include an overall Index of Multiple Deprivation (IMD) by LSOA with seven domains feeding into it. Each LSOA is given a deprivation score and rank across seven domains that aim to capture different aspects of deprivation in people's lives. The domain indices cover a range of economic, social and housing issues and are given different weightings within the index, which are:

- Income (22.5%)
- Employment (22.5%)
- Health deprivation and disability (13.5%)
- Education, skills and training (13.5%)
- Barriers to housing and services (13.5%)
- Crime and disorder 9.3%
- Living environment 9.3%

Devon ranks 102 out of the upper tier authorities in England with respect to multiple deprivations where a score of 1 represents the most deprived and a ranking of 149 represents the least deprived. Local authority district scores vary across districts in Devon, with a score of 1 representing the most deprived and a score of 354 the least deprived.

While Devon has low levels of deprivation at a county and local authority level, this masks significant variation at smaller geographical scales in urban and rural areas. Community Council for Devon recently concluded that rural Devon is 'substantially more deprived based on the location of deprived people, than on the location of deprived areas'.³

Devon has no LSOAs that fall within the most 5% deprived in England which have a rank between 1-1624. It does have five LSOAs that fall within the 10% most deprived in England which have ranks ranging between 1625-3248. Three of these are in Exeter and two are in North Devon. The LSOA that has the lowest rank in Devon of 1657 is Ilfracombe Central in North Devon. At the other end of the scale Devon has two LSOAs which fall within the least 5% deprived in England, these are found in South Hams (Ivybridge Woodlands) and West Devon (Tavistock South).

Generally the most disadvantaged LSOAs tend to be clustered in the North and West of the county, with a few exceptions in Exeter and some of the coastal towns along the south coast. This clustering points to geographical isolation and these areas rank less favourably in terms of employment, income and barriers to housing and services. Where deprivation occurs in urban areas, as demonstrated by the domains highlighted for Exeter, crime and disorder, health deprivation and disability, education skills and training and living environment appear to be the types of deprivation which are more prevalent.

In Devon 21 LSOAs are in the top 20% most deprived LSOAs in England. There is a correlation between increasing deprivation and a reduced life expectancy at birth in different parts of Devon.

³ The Rural Share of Deprivation in Devon: Community Council for Devon, Oxford Consultants for Social Exclusion, South West ACRE Network: Oct 2009

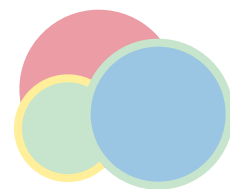
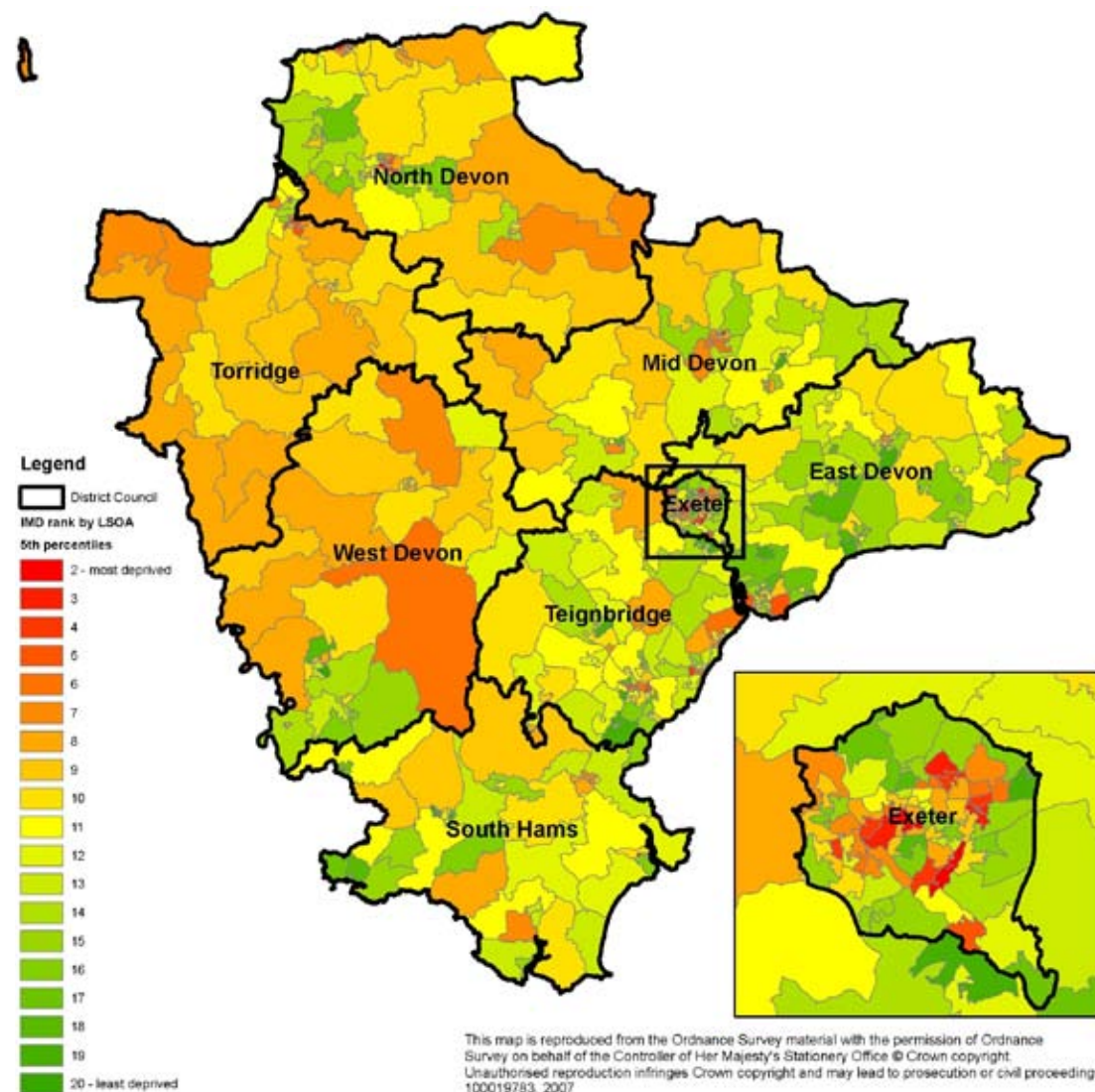


Table 2: Index of Multiple Deprivation 2007 - Devon LSOAs

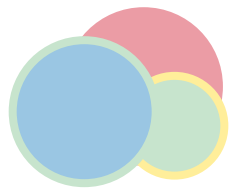
Area	Distribution by National Deprivation Quintile					Total LSOAs
	1 (20% Most Deprived LSOAs)	2	3	4	5 (20% Least Deprived LSOAs)	
Exeter	11	17	20	20	5	73
North Devon	5	17	20	14	2	58
Teignbridge	2	21	29	24	8	84
Mid Devon	1	11	17	12	2	43
South Hams	1	6	18	15	9	49
Torrige	1	15	17	4	0	37
East Devon	0	7	26	34	15	82
West Devon	0	7	15	7	2	31
Devon	21	101	162	130	43	457

Source: IMD 2007

Map 2: Index of Multiple Deprivation 2007



Source: IMD 2007, CLG



Children living in poverty⁴

Poor children's life chances depend on a complex combination of low household income, a lack of equal opportunities and social exclusion. While some children who grow up in low-income households will go on to achieve their full potential, many others will not. Poverty places strains on family life and excludes children from the everyday activities of their peers. Many children experiencing poverty have limited opportunities to play safely and often live in overcrowded and inadequate housing, eat less nutritious food, suffer more accidents and ill health and have more problems with school work leading to low educational attainment. As these children become adults they are more likely to be in poorly paid employment or economically inactive continuing the poverty cycle.

All local authorities are required to address child poverty and develop a Child Poverty Strategy. Devon County Council is also participating in a Total Place pilot on child poverty with Torbay and Plymouth councils.

There are various ways of measuring child poverty. The following are included here:

Income Deprivation Affecting Children Index (IDACI) - IDACI has been produced alongside the Indices of Multiple Deprivation 2007. IDACI is a subset of the Income Deprivation Domain of the Index of Multiple Deprivation, and shows the percentage of children aged 0-15 years in each LSOA that live in families that are income deprived. Income Deprivation is defined as either households receiving Income Support, Income-based Jobseeker's Allowance or Pension Credit; or those not receiving these benefits but receiving Working Tax Credit or Child Tax Credit with an equivalent income below 60 per cent of the national median before housing costs. The IDACI is the proportion of children aged 0-15 years living in such households as a proportion of all children aged 0-15 years.

An IDACI score of, for example 0.24 means that 24% of children aged less than 16 in that LSOA are living in families that are income deprived. LSOAs are also given a rank; 1 is assigned to the most deprived LSOA and a rank of 32,482 is assigned to the least deprived LSOA in England. The most and least deprived LSOAs in Devon are in Exeter: St Davids 53% (rank 2236) and Duryard 3% (rank 31164).

In Devon 15% (an estimated 19,891 children and young people aged 0-15) are living in income deprived households. This is less than the South West average of 17% (approximately 154,200) and the England average of around 22% (roughly 2.2 million children).

National Indicator NI 116: Proportion of Children in Poverty - the Proportion of Children in Poverty (NI 116) is calculated by the number of children living in families in receipt of Child Tax Credit whose reported income is less than 60% of the median income or in receipt of Income Support or Income Based Job Seekers Allowance divided by the total number of children in the area (determined by Child Benefit data).

⁴ Extract taken from Child Poverty Needs Assessment, Devon County Council 2010

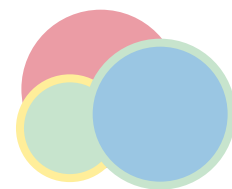


Table 3: Percentage of children living in poverty (2007)

Area	Number of children in families who are in receipt of Child Tax Credit (<60% median income) or Income Support/Job Seekers Allowance		Percentage of children in poverty	
	Aged under 16 years	Dependent children under 20 years old	Aged under 16 years	Dependent children under 20 years old
Devon	18,645	21,005	15.2%	14.5%
South West	151,785	169,460	16.9%	16.1%
England	2,141,690	2,397,645	22.4%	21.6%

Source: Department for Work and Pensions, 2010

Appendix 8 details a breakdown by district of the number of children in families receiving Childcare Tax Credit, Income Support or Job Seekers Allowance. Devon-wide 18,645 children under the age of 16 are considered to be living in poverty (Department for Work and Pensions 2010). Appendix 6 lists the top twenty wards across Devon with the highest percentage of children living in poverty.

A total of 139 LSOAs in Devon have a higher percentage of children living in poverty than the South West average (16.9%) with 69 of these higher than the England average (22.4%). At a ward level the highest percentages of children under 16 living in poverty are in St Davids Exeter (31.6%) and Ilfracombe Central (31%) with the lowest in Buckland Monachorum (3.7%) and Yarty (5.4%).

Free School Meals - In January 2010, 10,334 (10.8%) of Devon pupils were eligible for Free School Meals; an increase of 0.8% from January 2009. Free School Meals have been used as a proxy measure for identifying deprivation in individual families. Eligibility for Free School Meals is based on parents receiving specified benefits which include Income Support and Income Based Job Seekers Allowance. The percentage eligible in Devon at 10.8% is lower than the South-West Region (11.5%) and national (16.2%). Take up of Free School Meals has increased in recent years due to an easier application process and the incentive to do so to access the extended schools scheme.

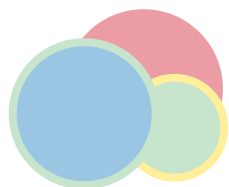


Table 4: Eligibility for Free School Meals (Jan 2010)

Sector	Area	Number on roll	No. pupils known to be eligible for free school meals	% eligible for free school meals
Nursery and Primary Schools	Devon	52,041	6,031	11.6
	South West	368,920	47,820	13
	England	4,134,240	717,060	17.3
Secondary Schools	Devon	42,740	4,107	9.6
	South West	324,430	30,880	9.5
	England	3,277,880	464,510	14.2
Special Schools	Devon	1,035	192	18.6
	South West	7,570	2,130	28.1
	England	91,820	30,600	33.3
All Maintained Schools	Devon	95,816	10,330	10.8
	South West	700,920	80,830	11.5
	England	7,503,940	1,212,170	16.2

Source: DCSF Indices of tables from schools, pupils and their characteristics, statistical first release May 2010 (based on school census returns Jan 2010). Note: includes full time and part time pupils who are sole or dual registrations. Includes boarders.

A growing economy⁵

Devon is a large and diverse economy. Although the county is predominantly rural, its character and economic structures are quite distinctive.

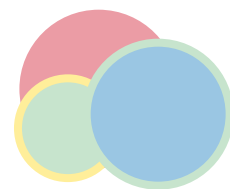
East Devon

East Devon is a very popular retirement destination and also a destination for inward migrants of older working age. Consequently, it has a very low proportion of people of working age compared with the national average. Overall the district has a relatively buoyant economy in terms of employment, plus residence-based earnings.

Exeter

Exeter has a much higher proportion of people of working age than the rest of Devon and a more highly qualified population than either regionally, or nationally. Workplace based earnings in Exeter are relatively high and well above the Devon average, making some parts of Exeter very prosperous. Despite this there are also some pockets of high deprivation. Several notable employers in Exeter include the University, the UK Met Office, EDF Energy and Howmet. In addition the public sector is a large employer in the city, with the location of a large hospital, two councils and regional and sub-regional administrative functions. It is also home to a large and relatively high quality retail offer.

⁵ Extract taken from *Devonomics 2010*, Devon County Council



Mid Devon

Mid Devon is a large mainly rural District council area with a good deal of commuting in and out of Mid Devon, due to the close proximity of good road links. In common with many other rural areas, jobs in sectors such as agriculture, food processing and lifestyle businesses tend to have a lowering effect on economic output. The largest town in the district, Tiverton is home to a number of engineering companies, together with Heathcoats textiles and an office of the information company Thompson Reuters. Tiverton, however, also suffers from a degree of deprivation.

North Devon

North Devon is rural maritime district council area in Devon. Earnings in this part of Devon are among some of the lowest in the country, the workplace-based average in 2009 being just £15,722 per head – 401st out of 407 local authority areas in the UK. The largest town is Barnstaple, the administrative and retail centre for much of northern Devon. It is the location of some medium and larger employers, including North Devon hospital and Petroc College.

Ilfracombe is also home to a large electronics manufacturer and has a reasonable tourism offer. Despite this, it suffers from a lack of employment generally and because of its isolated geography it experiences severe deprivation, having one area in the worst 5% of neighbourhoods nationally.

South Hams

The South Hams is a relatively prosperous district in South Devon. On the borders of Plymouth, residents in the district benefit from the good employment opportunities available close by. Resident earnings in South Hams are therefore 7% above the average for the county as a whole. Towns in the South Hams are relatively small, with Totnes acting as the administrative centre for the district with quite an important retail, employment and educational hub. The food and drink sector in the South Hams has a high profile.

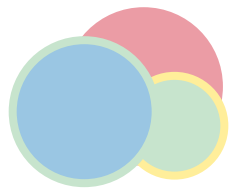
Teignbridge

Teignbridge is a varied district in south east Devon with rural, coastal, suburban and urban areas. Its largest town, Newton Abbot, has strong links with neighbouring Torbay. Newton Abbot is the administrative centre for the district and serves as quite an important market town, retail and distribution and employment centre. It also benefits from a mainline railway station with fast and frequent services to many destinations including London, Bristol and Birmingham. There are also several smaller high-tech precision manufacturing, electronic, defence and IT companies located in the district tending to cluster along the A38. The food and drink sector locally is growing in importance in the district.

Torrige

Torrige in north Devon shares many attributes with north Cornwall. It is isolated with relatively poor transport links, limited access to educational hubs or higher order retail centres and limited employment opportunities. In the District only 16% of the population has a qualification of NVQ4 or above, compared to 27.7% for Devon and 29% for England.

Under any measure earnings in Torrige are among the lowest in the whole of the UK, the workplace based average in 2009 being just £13,437 per head – 406th out of 407 local authority areas in the UK and 38% below the England and Wales average. Bideford is the largest town in the district, a small port and also a market town. It is the location of some small and medium sized employers, with a concentration of retail outlets at Atlantic Village.



West Devon

West Devon is a very rural district council which includes much of Dartmoor National Park. It also borders Plymouth to the south. While workplace earnings are some of the lowest in the country, the district has a reasonably well qualified population, with 35.3% of the population having a qualification of NVQ4 or above. This is over double the rate of neighbouring Torridge and above the average for Devon and for England. Notable employers tend to be concentrated in the food industry. Agriculture is very visible in West Devon, Forestry is also important – the District being the location for part of South West Forest.

Employment⁶

In 2010, Devon continued to enjoy an employment rate of around 75% to 82% of the working age population - significantly higher than those seen nationally (73%). The rate of part-time working, at 36%⁷, is significantly higher than the national average and has increased since 2007. Part-time working can provide flexible employment for those wanting to combine paid work with other responsibilities. However, a proportion of those working part-time are likely to want full-time work.

Table 5: Percentage of total employment by sector 2008, by local authority district

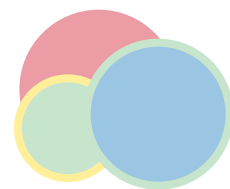
	Agriculture and fishing	Energy and water	Manufacturing	Construction	Distribution, hotels and restaurants	Transport and comms	Banking, finance and insurance	Public admin, education and health	Other services	Total employment
East Devon	4%	0%	7%	6%	31%	7%	12%	28%	5%	41,700
Exeter	0%	2%	4%	4%	21%	6%	20%	37%	4%	84,800
Mid Devon	6%	0%	16%	6%	24%	7%	12%	23%	6%	24,300
North Devon	3%	0%	14%	4%	32%	3%	11%	29%	4%	40,100
South Hams	3%	0%	11%	5%	29%	8%	15%	24%	5%	33,900
Teignbridge	3%	1%	8%	7%	32%	4%	13%	26%	6%	40,900
Torridge	7%	0%	14%	6%	26%	4%	11%	26%	5%	17,700
West Devon	6%	1%	10%	6%	30%	5%	10%	27%	6%	16,500
Devon	1%	1%	9%	5%	28%	6%	15%	30%	5%	293,700

Source: Annual Business Enquiry (via Nomis), 2008

The two dominant sectors of employment in Devon are; 'Public administration, education and health' and 'Distribution, hotels and restaurants'.

⁶ Extract taken from *Devonomics 2010* Devon County Council

⁷ ABI 2008



The occupational make-up of Devon's workforce mirrors that of the South West and England as a whole. However, Devon has a lower proportion of individuals employed in professional and administrative occupations compared to the regional and national averages and a slightly higher proportion of elementary occupations, suggesting a high level of unskilled employment in the local economy. Managers and senior officials account for 16% of employment in Devon, followed by associate professional and technical occupations (14%) and professionals (12%).

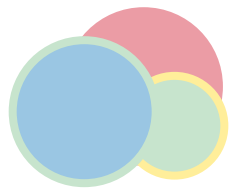
The Devon economy has in many respects been in transition throughout the first decade of the twenty first century. Traditional sectors have been under pressure and some are in decline. In Devon agriculture contributes four times more to output than it does in the national economy. With its unique heritage, landscape features and two coastlines, Devon is a major tourist destination attracting over 6 million staying visitors per year. Hotels and catering can be seen as a proxy for the tourism industry and make up 7% of the Devon economy – over twice the contribution the sector makes to the national economy. The contribution made by manufacturing (9.6%) is roughly 80% of the national average (12.8%).

Although Exeter has a strong role as a sub regional administrative centre the financial services sector remains relatively under represented in the Devon economy. The contribution to the overall Devon economy made by the financial service sector has fallen over the ten years to 2008. Manufacturing has fallen as a share between 1998 and 2008. Construction, business services and education and health have all at least maintained their relative positions.

The most significant contribution to the increase in Devon's output between 1998 and 2008 were, in terms of industrial sectors, construction (7.8%), distribution (13.7%) and business services (30.4%). These three dominant sectors together contributed some 52% of the increase in total output for the county.

Although total output in Devon has grown faster than the national average, output per head of population has not. Despite very slight narrowing of the gap, output per head in Devon has remained around 25% lower than the national average. Consideration of the overall composition of the Devon economy goes some way to explaining the differences in the per capita output between Devon and the national average. Devon has a significantly higher proportion of women employees, part-time employees and the self-employed. Women employees still do not earn the same as men, part-time employees do not earn as much as full-time employees and the self-employed as a whole (where construction workers and small businesses predominate) often do not earn as much as full-time workers in manufacturing or financial services. The other important factor is the proportion of the population not employed.

The provision of childcare is a key aspect of the Government agenda to reduce child poverty and enable parents to take up work or training. This is particularly important in Devon given the high level of women employees contributing to the economy. The duty of Devon County Council is to secure sufficient childcare provision which meets the needs of parents who are already in work and helps them to maintain their jobs while balancing family life. Over a third of Devon's families rely on using some form of formal childcare for their children and the main purpose is through necessity to enable them to work, study or train. This contributes to a growing economy.

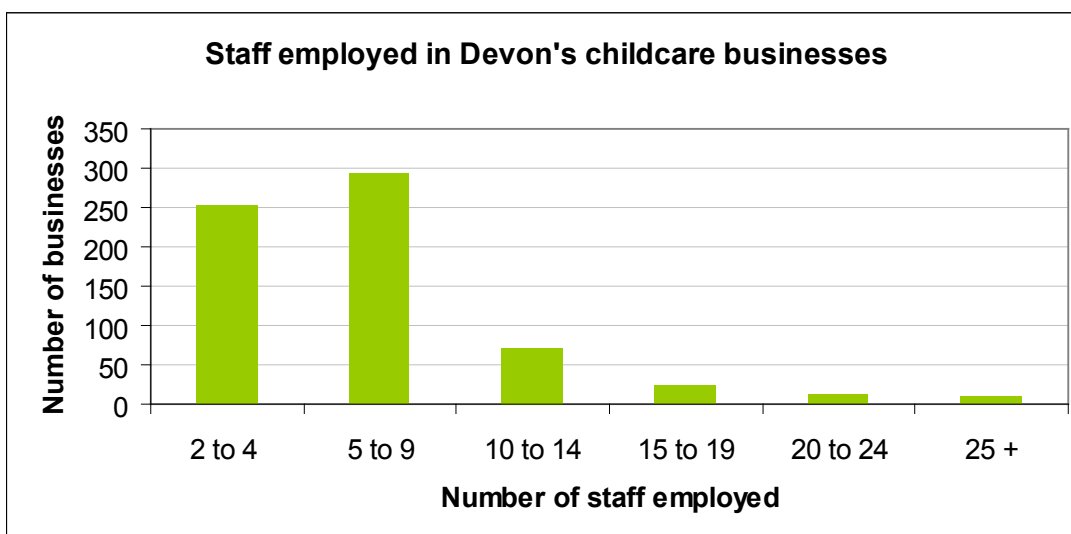


The Early Years and Childcare Service holds a Memorandum of Understanding with Jobcentre Plus to support parents in workless households to access work by helping to remove the barriers which may be caused by access to childcare. In addition the Childcare Tax Credit which is part of the Working Tax Credit is important to making childcare affordable. Through the work with Devon Welfare Rights Unit, the general promotion of Childcare Tax Credit in the sector and the provision of sustainable high quality childcare across Devon more parents can enter the labour market, resulting in increases in family income and a reduction in the number of children living in workless households.

Childcare businesses also contribute to the growing economy and employment of Devon's working population. Devon-wide the early years workforce has some 5,500 staff members in the private, voluntary and independent sectors working in approximately 1,600 small independent businesses (including 800 self-employed childminders working from home and 80 home childcarers working in the child's home).

Over 400 of the businesses are voluntary groups based in small local communities, run by voluntary management committees made up from parents and other members of the local community. The majority of these employ five or more members of staff and are run as community businesses.

Chart 4: Staff employed in Devon's childcare businesses

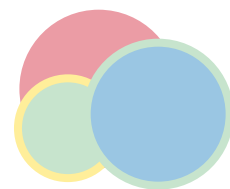


Source: Early Years and Childcare Service, Devon County Council

Note - Data missing from 87 childcare businesses. Excludes single operating childminders and home childcarers

Leadership and management support is provided to help strengthen the management structures and provide opportunities for professional development.

In the consultation with childcare providers, a large proportion of childcare providers reported that there had been no impact to their business during 2009/10 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.

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 and therefore do not need childcare or they cannot afford it.

Other reasons for losing children were 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.

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.

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.

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 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 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.

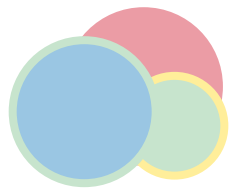
Due to the fact that providers are having to cut costs and children are leaving, providers report they are having to stop sessions and cut back on resources. A few providers reported they had considered ceasing their provision due to the effects of the recession.

Conversely 24 providers reported that the recession in 2009/10 had had a positive impact on their business. Numbers of children increased as financial pressures to increase household income means both parents need to work. Some providers also reported that they are increasing their opening hours.

Views of childcare and work

Employers' views

A total of 55 employers participated in the consultation, and the majority (80%) were in the private sector. Just under half were small businesses employing between one and ten employees. The larger businesses tended to have more staff who were part-time than the smaller employers.



For 40% of the organisations, at least half of their workforce were female while approximately 20% had at least a 70% female workforce. This was more common in the smaller businesses. For 40% of the businesses the majority of their workforce had children aged 14 years and under.

In this context, it was acknowledged by many employers that support with childcare issues is important for their workforce and makes a valuable contribution to staff welfare. The majority of employers are keen to encourage flexibility and work-life balance and the majority have policies and benefits in place which go beyond the statutory obligations towards their staff in this area. A number of common themes emerged from interviews with employers and they give valuable guidance as to issues which should be given consideration and credit when assessing the childcare provision in the county.

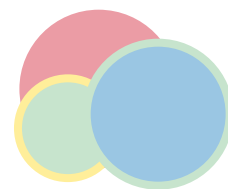
Choice, availability and provision of childcare are not perceived to be major issues. The key problem areas identified are a lack of affordability, flexibility and location. This is mentioned in a number of contexts, such as restricting choice of types of provision, opening hours, holiday and after school provision.

Organisations recognise the importance of policies to support childcare to ensure retention of good staff. Organisations keep their policies under regular review and many indicated they are willing to explore new and innovative ideas and practice. However, organisations (particularly smaller businesses) feel they are unable to do any more than what they are doing at present and it should be acknowledged that issues of flexibility and affordability require change at government or local authority level to ensure employees are getting high quality affordable childcare and that the cost of childcare is not outweighing the benefits of returning to work. Furthermore it is suggested that issues of affordability are restricting employees in their choice of provision.

There is evidence that suggests a lack of childcare provision available after school, in the school holidays and in an emergency or at short notice. The lack of out of school, emergency and short notice childcare can prevent employees from being able to come into work.

All the organisations interviewed encourage a formal or informal flexible working structure within the operational constraints of their business. This is popular among employees and is highlighted by the fact that very few organisations reported childcare or employees taking up employment or continuing to work for their organisation as a problem. For working parent's flexible working patterns reduces the need to find alternative childcare provision. However, flexible working arrangements are likely to be an area for innovation and expansion in the future; given in the next three years nearly half of the organisations see the number of employees increasing which will place a greater demand on childcare provision. Developing childcare capacity at a local level will secure sustainable modes of provision which meet the demands of local parents not currently being met by other providers, and which are also affordable with a particular focus on accessibility for all parents and children. This will continue to develop a quality workforce and it will meet employer's demands.

Organisations expressed a difficulty in getting information and a lack of knowledge about what other sources of advice and information exist. They were not aware of DISC, Devon County Council's Family Information Service. This suggest a focus is needed on promoting the services DISC provides so employers and employees are better supported with timely, accurate and impartial information, advice and guidance.



Parents' views

Of the parents and carers interviewed by Hemsall's, the 80% were female and 20% were male. In two parent households 70% (1,182) had both parents working; 26% (441) had one parent working and non-working couples accounted for 3% (55). In one parent family households two-thirds (67%, 215 households) were working and a third (33%, 107 households) were not working at the time of the survey.

A high proportion of respondents were working at the time of the survey (73%, 1,465 respondents) and of these the majority (635 respondents, 43% of those working and 32% of all respondents) were working full time - in excess of 30 hours a week. A small percentage of respondents (3%, 51 respondents) were registered as unemployed. Over one in five respondents (22%, 447 respondents) looked after the home and family.

84% of respondents were living with a partner and 92% of partners were working. A higher percentage of respondents' partners were working full time (81% compared to 32% of respondents) and a lower percentage were working part-time (12% compared to 42%). This reflects the more traditional family work patterns in Devon.

Table 7: Employment status - respondent and respondents' partners

Employment status	Percentage of respondents	Percentage of Partner of respondent (where appropriate)
Working full time (30+ hours a week)	32%	81%
Working part time (16-29 hours a week)	28%	8%
Working part time (under 16 hours a week)	14%	4%
Look after home/family	22%	4%
Self-employed	0.50%	0.70%
Registered unemployed	3%	1%
Unemployed but not registered	0.60%	0.30%
On a training scheme	0.30%	*
Student	1%	0.50%
Voluntary work	0.70%	0.10%
Disabled/claiming incapacity benefit	0.70%	0.40%
On maternity leave	0.70%	*
Retired	1%	1%
Other*	0.80%	0.50%

Source: Parent and Carer Survey, Hemsall's March 2010

Note - Base 2,000 respondents; 1674 partners: percentages rounded. Other includes: hours vary; not working; off sick; claiming income support; refused. * indicates less than 0.1%

Respondents were asked what their, or their partners, working patterns were in a normal working week. While the majority reported that they or their partner worked standard office hours (between 8am and 6pm Monday to Friday) responses show relatively high percentages working non-standard hours, such as weekends and shift work.

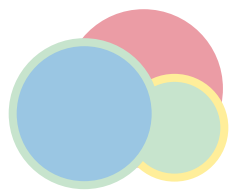
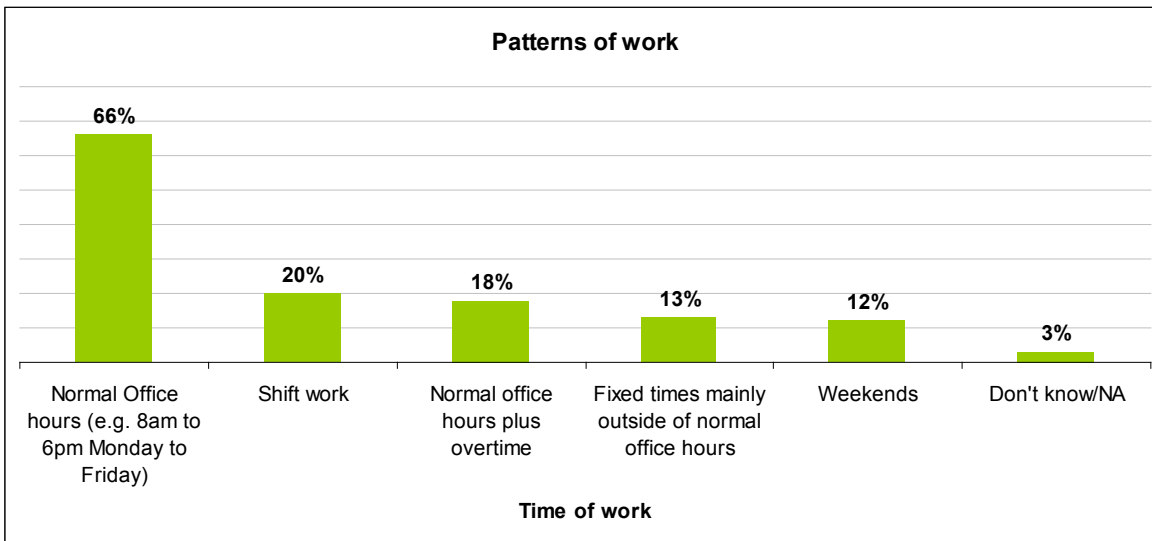


Chart 5: Patterns of work (respondent and partner) in a normal working week



Source: Parent and Carer Survey, Hempsall's March 2010
 Base 1,852: percentages rounded. Multiple responses

A higher proportion of respondents living in urban communities (defined as communities with over 10,000 inhabitants) reported working normal office hours compared to those living in more rural areas, or mixed (town and fringe) areas. Weekend working patterns and normal office hours plus overtime were more evident in rural communities.

Use of childcare was analysed for working and workless households. A workless household is defined as one where there are no adults of working age in paid employment. Note: the base for workless households according to this definition is relatively low (162) and therefore findings should be regarded as indicative only.

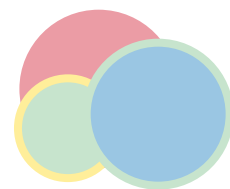
A much higher proportion of workless households did not use any form of childcare at the time of the survey. Levels of use of formal childcare were in line with overall findings, however levels of use of informal childcare and a mix of formal and informal childcare were much lower than the average.

Respondents were asked why they used childcare (either formal or informal). The most common reason for using childcare was for economic purposes (to enable parents to work, look for work, train or study). This varied by age group with the highest proportion for the very young and primary school-aged children.

Table 8: Proportion of families using childcare for economic purposes

	0-2 years	3-4 years	5-10 years	11-14 years
Devon	55%	56%	61%	51%
National	63%	54%	51%	38%

The pattern of use by age differs from the national survey of childcare which showed a distinct decline of use the older the age of the child. In general Devon parent's use for economic reasons was lower for pre-school children and higher for school age children than the national survey.



Workless households

Nationally around 1.9 million children live in workless households⁸ (19% of all children aged 0-15 years). This is lower in the Devon with about 12% of children living in workless households. Two-thirds of all children in workless households are in lone parent households. Half of all children of lone parents live in households that are workless. This compares to just one in fifteen for children of couples (see Appendix 7).

Table 9 indicates the percentage of young people living in households which are entirely dependent on workless benefits rather than employment. Benefits include Income Support, Job Seekers Allowance, Incapacity Benefit, Severe Disablement Allowance and Pension Credit. Households with a tradition of benefits dependency commonly represent areas of low aspirations among young people.

Table 9: Children dependent on workless benefits

	Number of 0-15 year olds	Number of children 0-15 years living in benefits households	Percentage of children 0-15 years who are benefits dependent
Devon	124,984	15,535	12.4%
England	9,686,396	1,908,220	19.7%

Source: DWP April 2007, Devon PCT November 2007

Appendix 7 shows a breakdown of childcare numbers dependent on workless benefits by Learning Community. The Learning Communities with the highest proportion of benefit claimants are; Bideford, Barnstaple, Exeter Beacon, Exeter Central and Chestnut, Exeter West Exe, Ilfracombe and Teignmouth; all over 15.5%.

Between June 2008 and March 2009, Devon's claimant count rose from 1% of the whole working age population to 2.6%. It has not dropped significantly since. Yet while overall unemployment remains at low levels, it has affected some parts of Devon more than others. For example Ilfracombe (5.2%), Bideford (5.1%) and Westward Ho! (4.1%) have the highest rates of claimant unemployment, considerably above the average for Devon as a whole (2.4%).

Awareness of Working Tax Credits (WTC)

Respondents to the survey who were using childcare were asked if they received any support for the cost. A wide range of support was identified, although in very low numbers for many types such as family allowance, respite funding and child maintenance. Child Tax Credit was the most commonly cited support identified, followed by Working Tax Credit, the childcare element of Working Tax Credit and the free early education entitlement. Responses for these forms of support are shown in Chart 6.

⁸ ONS (2010) Labour Force Survey UK, Updated 2010 www.poverty.org.uk/18/index.shtml

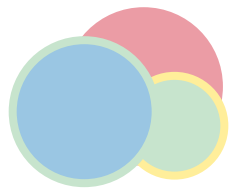
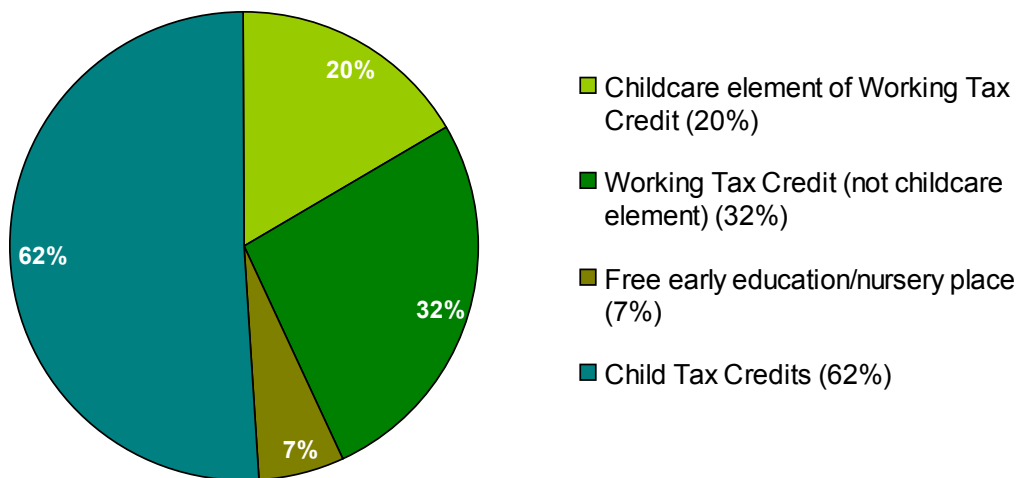


Chart 6: Respondents in receipt of support (top four types identified only)



Source: Parent and Carer Survey, Hemsall's March 2010

Note - Base 1,294: percentages rounded. Multiple responses

Relatively few respondents were receiving the childcare element of Working Tax Credit. Across all respondents 32% (412 respondents) reported receiving Working Tax Credit (WTC) and 20% (255 respondents) reported receiving the childcare element of WTC.

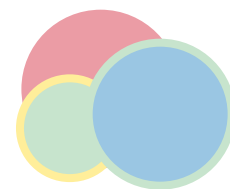
Adjusting for households with an annual income of in excess of £66,000 (the upper threshold for eligibility for WTC in March 2010), 35% of respondents were claiming WTC and 22% the childcare element of WTC.

A higher proportion of respondents using formal childcare reported receiving the childcare element of WTC; however 16% of respondents who were not using formal childcare claimed to be receiving the childcare element of WTC, which is only payable to childcare in registered formal settings. This potentially identifies a level of confusion about different elements of the Tax Credits system.

Income Maximisation Project

In spring 2010 we commissioned Devon Welfare Rights Unit, part of the Citizen's Advice Bureau, to complete some work to increase the take-up of benefits, and in particular increase the number of working families benefiting from the childcare element of the Working Tax Credit as a percentage of the number of working families receiving more than the family element of Child Tax Credit (National Indicator 118).

Figures provided by Her Majesty's Revenue and Customs (HMRC) indicate that take up of formal childcare by low income working families in Devon is below the regional and national averages. Data is currently available for periods between 2004/05 and 2008/09 and this shows that take-up has increased over the period at local, regional and national levels. Devon has improved take-up against national average figures, but remains below the regional average (see Chart 7).

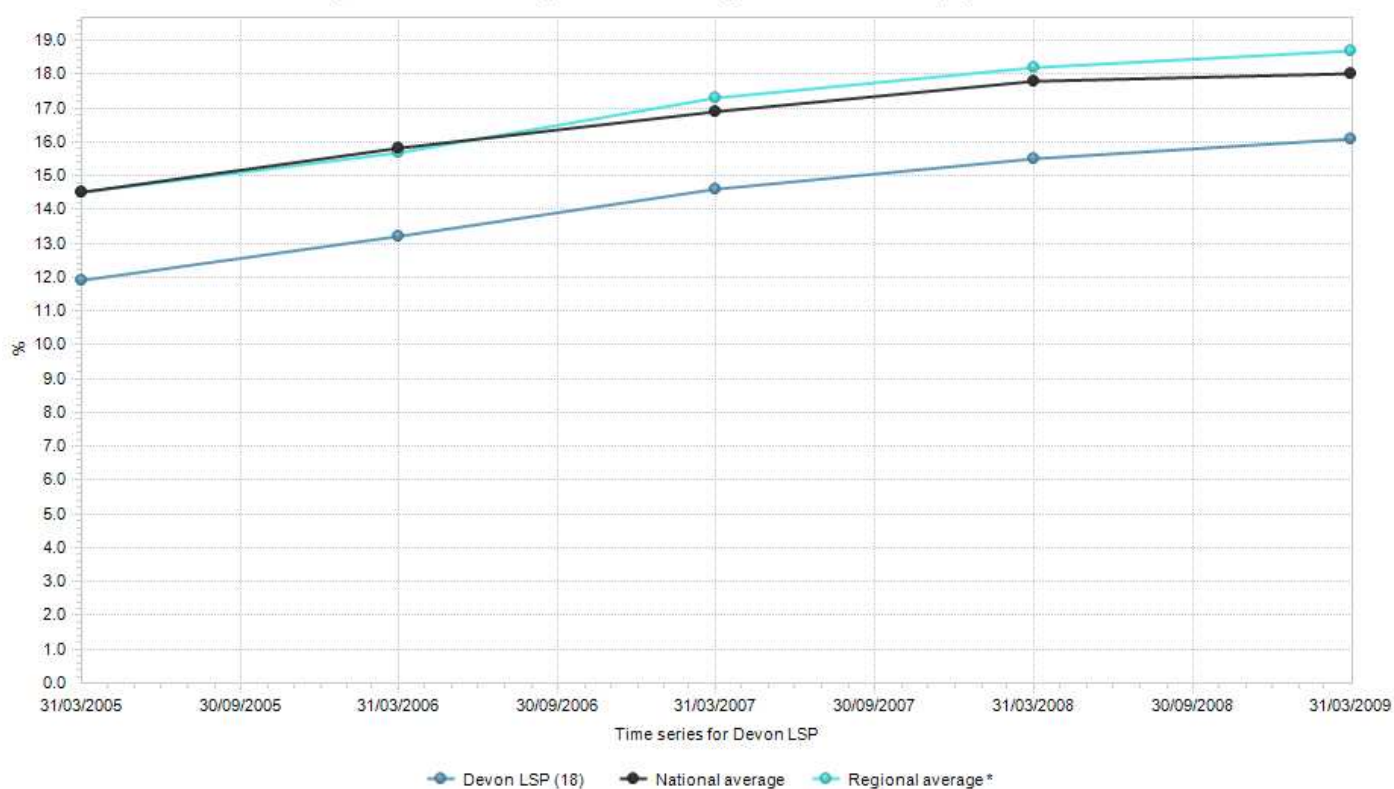


In work poverty remains a reality for many families, with evidence that as many as 400,000 children live in poverty in working homes because the family is not accessing its full entitlement to benefits and tax credits.

The childcare element of WTC depends on families being eligible for both Child Tax Credit at more than the family element and being in work. The take up of both these strands of the tax credit system is a crucial part of the package of support to lift low income families out of poverty.

Chart 7: Take up of formal childcare by low income working families

NI 118 - Take up of formal childcare by low-income working families - Devon LSP (18) - FY 2004/05 to FY 2008/09



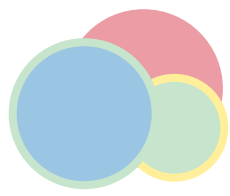
Source: www.pat.communities.gov.uk/pat

The overall aims of the project were to:

- maximise take-up of entitlement to benefits and tax credits by households in Devon, with particular reference to the take-up of the childcare element of Working Tax Credit
- raise awareness of entitlement to benefits and tax credits among Devon County Council's Children and Young People's Service staff through training and publicity.

Devon Welfare Rights Unit undertook to:

- provide a leaflet and poster for distribution across the county to advertise the benefits of Working Tax Credit and a written article on Tax Credits for media use
- provide a series of training sessions for 80 identified children's centre staff and twelve members of the EYCS team to increase staff confidence and capacity to support and signpost parents effectively
- provide briefings at Devon County Council Spring Provider Network meetings.



The target of increasing take-up of Working Tax Credit and the childcare element of Working Tax Credit will be evaluated by referring to figures produced annually by HMRC. Take up in Devon has increased in line with increases in the regional and national average figures over the past five years; however we remain below the average level as at 2008/09. Figures for 2009/10 are due to be published in May 2011.

Housing

There are over 340,000 dwellings in total in Devon.⁹ The vast majority of these (89%) are held in the private sector, either through owner occupation and second homes or in the private rented sector. The 2001 Census provides a greater breakdown suggesting that within the private sector, 46% are owned outright, 42% are owned with a mortgage and 12% are in the private rented sector. By comparison, in England, 29% are owned outright, 39% are owned with a mortgage and 9% are in the private rented sector.

The remainder of the housing stock consists of:

- 7% Registered Social Landlord housing
- 4% local authority owned stock
- 0.2% other public sector housing.

By comparison, England has higher proportions of local authority owned stock (8%), Registered Social Landlord owned stock (10%), and a much lower proportion of private sector dwellings (82%) than Devon¹⁰. House price to earnings ratios have grown significantly between 2000 and 2009. Since 2000 the affordability of purchased homes has increased by 72% in Devon which was greater than the increase seen in the South West (58.3%) and England (57.5%).

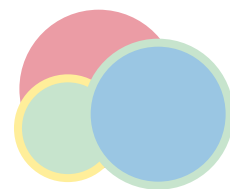
Table 9: Average House Prices in Devon (Q1, 2009)

Area	Number of Sales 2009 Jan to Jun	Average House Price Jan-Mar 2009 (£)	Average House Price Apr-Jun 2009 (£)
South Hams	470	£254,703	£274,608
West Devon	597	£251,318	£216,474
East Devon	454	£231,045	£247,690
North Devon	521	£208,319	£199,548
Teignbridge	470	£197,450	£210,051
Mid Devon	419	£195,220	£202,579
Exeter	481	£180,367	£197,582
Torridge	498	£178,217	£200,165
Devon County Council Area	3910	£212,402	£220,351
South West	28841	£200,715	£225,929

Source: Land Registry of England and Wales, period January to June 2009

⁹ Communities and Local Government, Table 100 Dwelling Stock: Number of Dwellings by Tenure and district England; 2008/2009 (latest update: 25/02/2010)

¹⁰ Communities and Local Government, Table 100 Dwelling Stock: Number of Dwellings by Tenure and district England; 2008/2009 (latest update: 25/02/2010)



There are two significant housing developments planned for Devon. The Cranbrook new community was granted outline planning permission on 29 October 2010. This development of a new modern market town in East Devon, is located east of Exeter close to Exeter International Airport and the planned Skypark Business Park. The new community comprising up to 2,900 residential dwellings will have a town centre and a local centre, and will comprise retail, employment, community and leisure uses, two primary schools, a secondary school, sports and recreation facilities, a country park and a railway station. The new community will be economically active, both within its boundaries and in relation to nearby major employment sites.

Sherford new community is planned on land south of the A38 and east of Plymouth, partially located in the South Hams District in Devon and partly in Plymouth city. The proposed development applied for outline planning permission in 2006 for the provision of up to 5,500 new dwellings; business and commercial space; mixed retail accommodation, community and open space facilities; three primary schools and one secondary school; health care centre and a community park. Amendments to the application were submitted to the two councils in the form of an agenda in May 2009. South Hams District Council and Plymouth City Council resolved to grant outline planning permission for the new community subject to the completion of a section 106 legal agreement.

Other Learning Communities with over 5,000 new houses planned during the next 20 years are on the outskirts of Exeter, Barnstaple, Newton Abbot and Bideford. More than 2,500 houses are planned for Exmouth. There are between 1,500 and 2,000 planned new housing for Cullompton, South Dartmoor, Kingsteignton, Okehampton and Honiton.

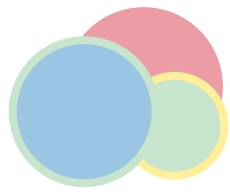
Skills, education and training

In 2008, 27.7% of the Devon working age population were qualified to NVQ level 4, just below the South West and national averages, of 28.3% and 28.7% respectively. Variation was seen across Devon with higher levels in Exeter (30%) and South Hams (35%) as compared to Torridge (16%)

The proportion of Devon's population qualified to Level 3 or above grew from 42% to 50% between 2001 and 2008 and is now just above the national average of 47.4%. Exeter and the South Hams remain the best qualified districts, with around 58% of their working age populations qualified to Level 3 or above. At 37% Torridge again has the lowest proportions qualified to Level 3.

At the lower end of the skills spectrum 29.2% of Devon's population have not achieved a Level 2 qualification, generally considered the minimum for employability in anything other than elementary occupations. This is 0.6 percentage points above the rate for the South West (28.6%), and 2.8 percentage points lower than the national average of 31.4%.

Skill shortages measure the extent to which employers are experiencing problems with recruiting due to lack of skills. The most recent Devon Renaissance Business Survey (2009) found that over 1,800 businesses (60%) had tried to recruit new staff during the past year, and 39% of these had experienced difficulties.

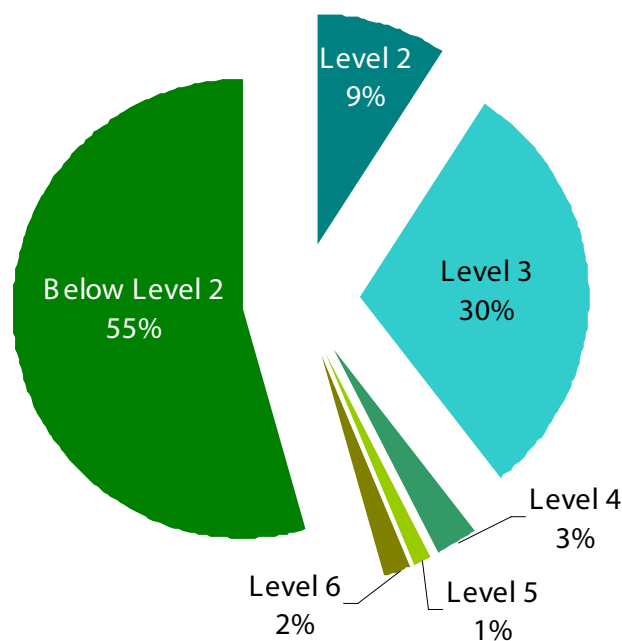


Qualification levels for young people in Devon leaving school in 2009 were recorded as 51.8% of 15 year olds in Devon achieving five or more A*-C grades at GCSE level, including English and Maths. This is a similar percentage to the South West average but higher than the national average of 50.9%. As with adult qualifications, this level of performance was not achieved in Torrington and North Devon districts. In 2008/09, only 47.7% of pupils in North Devon and 47.5% of pupils in schools in Torrington achieved this level. These were well below the Devon and the national averages.

In the childcare sector, around 55% of staff working have not achieved a Level 2 qualification. For early years staff working in group providers this is 49%, but for home-based childminders this rises to 72%. This is very high compared to the 29.2% of Devon's population at the lower end of the skills spectrum below Level 2.

However, a further 24% of staff are currently in the process of undertaking qualifications. Nearly all of these are being supported to gain their qualification through the Early Years and Childcare Service.

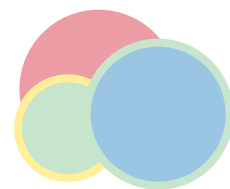
Chart 8: Qualification levels of staff employed in Devon's childcare businesses



Source: Early Years and Childcare Service, Devon County Council

Through providing training, learning and development opportunities the Early Years and Childcare Service provides a high-quality and cost effective workforce development service to managers and staff of childcare employers in the private, voluntary and independent sectors to support their business plans and meet legislative requirements.

In addition, the Early Years Leadership and Management Strategy seeks to ensure that all childcare businesses have access to high-quality leadership and management training. This involves developing new training and management standards in an evolving business environment, and requires interpreting government policy across multiple providers in the private and voluntary sectors. It is particularly challenging since it involves raising standards and expectations in a sector long associated with poorly trained staff and non-existent career structures.



The Children's Plan 2007 (DCSF) restated a public commitment to have a graduate leading practice in every full daycare setting, with two graduates in settings in disadvantaged areas, by 2015. Specifically in early years childcare businesses caring for children below statutory school age, the government target was to implement a graduate-led workforce at Level 6 leading on quality improvement.

The Department for Education (DfE) announced in January 2011 their continued commitment to invest further funding in graduate (level 6) programmes in early years and confirmed that the Children's Workforce Development Council will continue to deliver the Early Years Professional Status (EYPS) and the New Leaders in Early Years programmes in 2011-2012.

However, the DfE has announced that they will remove the requirement for all settings to meet the 2015 target as they feel it should be 'good practice' to have a graduate led workforce rather than a 'requirement'. In Devon there are currently just over 100 qualified Early Years Professionals working in early years settings and a further 180 practitioners undertaking a Foundation Degree in Early Years (level 5) before undertaking EYPS.

Early Years Foundation Stage Profile

The Childcare Act 2006 set targets to improve the outcomes for young children and to reduce inequalities between those at risk of the poorest outcomes as compared to the remainder. The targets set apply only at a local authority level.

The targets are to:

- improve young children's development by increasing the percentage who achieve a total of at least 78 points across the Foundation Stage Profile, to include at least 6 points in each of these scales; personal, social and emotional development and communication, language and literacy
- improve the average Foundation Stage Profile score of the lowest achieving group to narrow the gap between that group and the rest.

The [Early Years Foundation Stage Profile \(EYFSP\)](#) is an assessment of a young child's progress at the end of the Early Years Foundation Stage and reflects the areas covered by the curriculum guidance for the Early Years Foundation Stage. It is designed to approach early development and learning in a holistic and integrated way across six main areas:

- Personal, social and emotional development
- Communication, language and literacy
- Mathematical (problem solving, reasoning and numeracy)
- Knowledge and understanding of the world
- Physical development
- Creative development

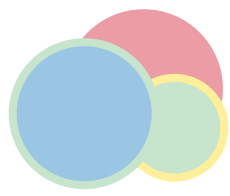


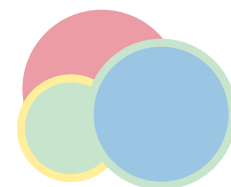
Table 10: Learning Community Foundation Stage Profile Results 2010

Overall Devon EYFSP results	Year	Total number of pupils	a) % achieving 6+ on all PSE scales	b) % achieving 6+ on all CLL scales	c) % achieving 6+ on all PSE and CLL scales	d) % achieving 78 or more	e) % achieving 78 or more inc 6+ in PSE and CLL NI 72	f) Median Point Score	g) Average score of lowest 20%	h) Gap between MPS and lowest 20% NI 92
Devon	2010	7161	73.2	56.7	51.9	75.6	51.8	89.0	59.3	33.4
	2009	6926	67.1	52.4	46.9	71.3	46.9	87.0	57.2	34.2
	2008	6926	65.1	48.5	42.9	68.6	42.9	86.0	55.1	35.9
	2007	6457	65.1	44.8	40.0	67.4	39.9	86.0	54.4	36.7

Source: Devon Education Services, Devon County Council September 2010

The percentage of children achieving 6+ points on [Personal, social and emotional development](#) and [Communication, language and literacy](#) with an overall score of at least 78 points in Devon has continued to rise since year on year from 39.9% in 2007 to 51.8% in 2010.

The percentage gap between the average score of the lowest 20% and the overall group score has also decreased year on year from 36.7% in 2007 to 33.4% in 2010.



Childcare statistics

Table 11: Number of childcare providers in Devon, by type

Carescheme Type	2005	2006	2007	2008	2009	2010
Childminders	848	887	856	850	828	783
Home childcarers						83
Maintained School Nursery Class	45	45	52	54	55	55
Private Day Nurseries	101	108	113	106	106	109
Private Nursery Schools	14	13	8	12	12	10
Nursery Units of Independent Schools	20	20	17	19	21	17
Pre-Schools	290	274	266	265	264	266
Before School Clubs	8	5	13	11	28	32
After School Clubs	37	39	48	45	35	41
Before and After School Clubs	17	17	27	28	37	48
Holiday Play Schemes	65	62	58	50	55	65
All-year-round clubs	47	54	58	63	56	49
ALL PROVIDERS	1492	1524	1516	1503	1497	1558
Home Based	848	887	856	850	828	866
Group Based	644	637	660	653	669	692
Home Based	57%	58%	56%	57%	55%	56%
Group Based	43%	42%	44%	43%	45%	44%

Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Table 11 shows the change in the number and type of childcare providers in Devon over the last five years. See Appendix 1 for details of the number of childcare providers by Learning Community.

Since the last Childcare Sufficiency Assessment in March 2007 the main changes in the number of childcare providers by care scheme type have been seen in childminders and in out of school provision for primary aged children.

The overall number of childminders offering home-based childcare for a range of age-groups has consistently declined over the last four years, although this has been offset by the recent acknowledgment of home childcarers who offer childcare provision at the child's residence.

Home childcarers are registered on the Voluntary Childcare Register which started in September 2008, and includes nannies who previously were not able to register with Ofsted. Some childminders have dual registration which allows them to work from their own homes and from the child's home. An advantage of Ofsted registration is that parents can access the Childcare Tax Credit support for childcare costs.

Chart 9 shows the trend in home-based childminding places over the last five years. The highest number of home-based childminders was seen in 2006 (887), in March 2010 this number had decreased to 783 across Devon.

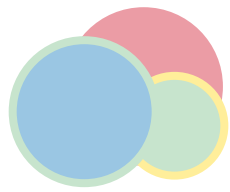
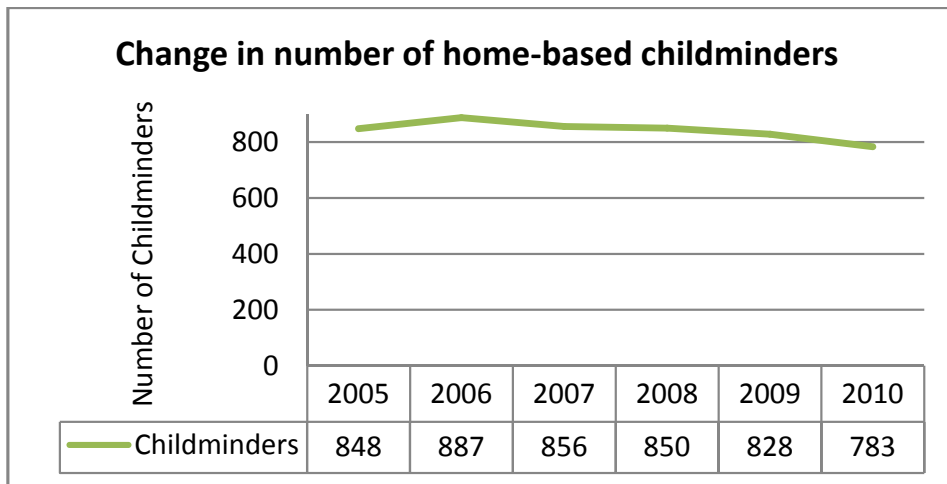


Chart 9: Change in the number of home-based childminders over the last six years

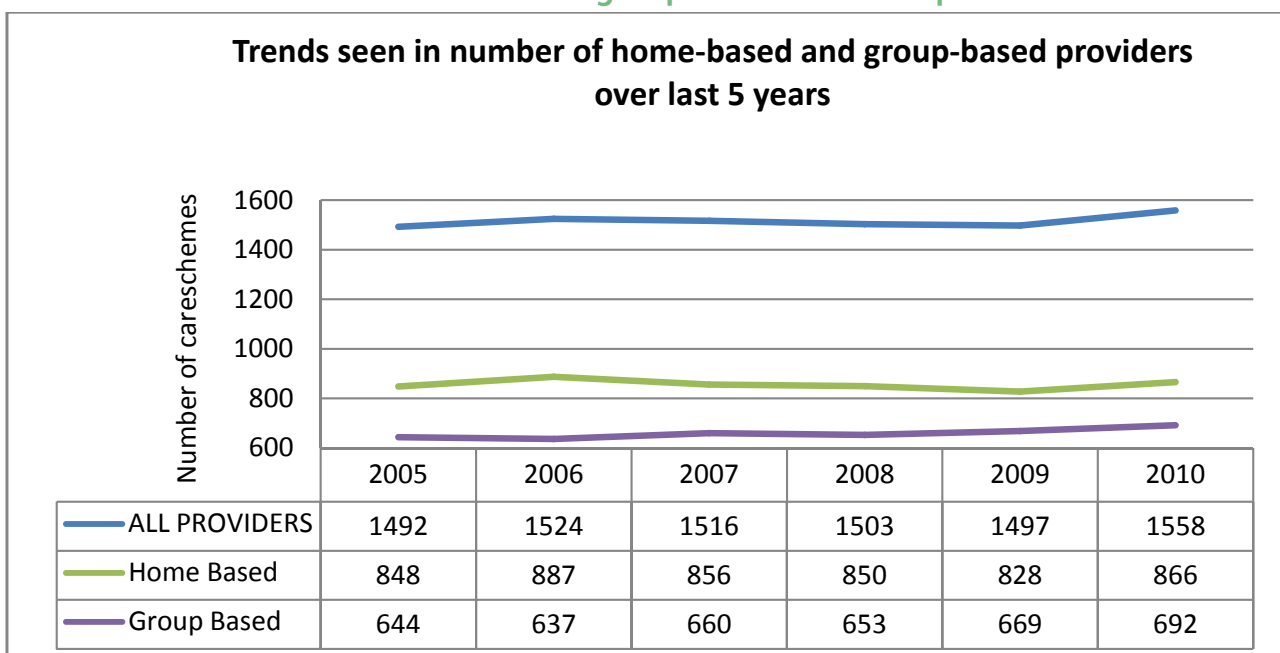


Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

The decrease in childminders since March 2007 has been mirrored in the majority of Learning Communities across Devon, with just under two-thirds of all Learning Communities showing a decrease in the overall number of registered childminders.

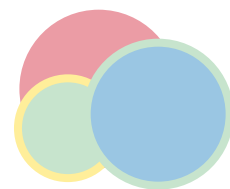
Over the last year there has been a slight change to this trend. The proportion of Learning Communities in Eastern Devon losing childminders has remained high at 80%, while this proportion has decreased in Southern Devon to 40%. Conversely, a higher proportion of Learning Communities in Northern Devon (50%) have shown declining childminding numbers during the last year.

Chart 10: Trends in home-based versus group-based childcare provision



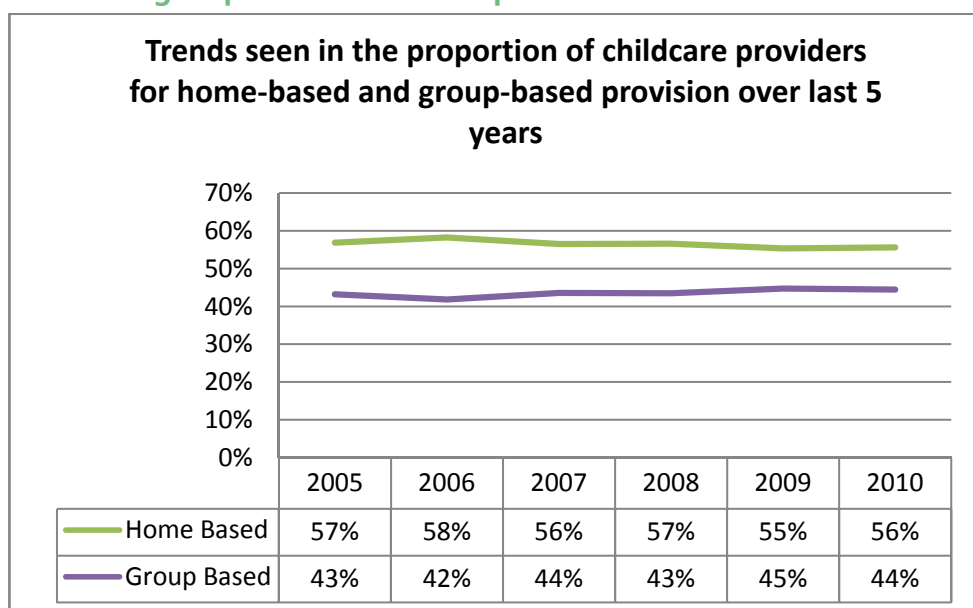
Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Overall the number of providers has increased, rising from 1516 providers across Devon in March 2007 to 1558 providers in March 2010. The figure for home-based provision in March 2010 also includes the newly recognised home-based provision from home childcarers as well as childminders.



The greatest increase has been seen in the number of group-based providers. Group-based providers of daycare for under five year olds have remained fairly stable in overall numbers of providers, but there has been a significant increase in providers for out of school provision, an increase of 31 providers since March 2007.

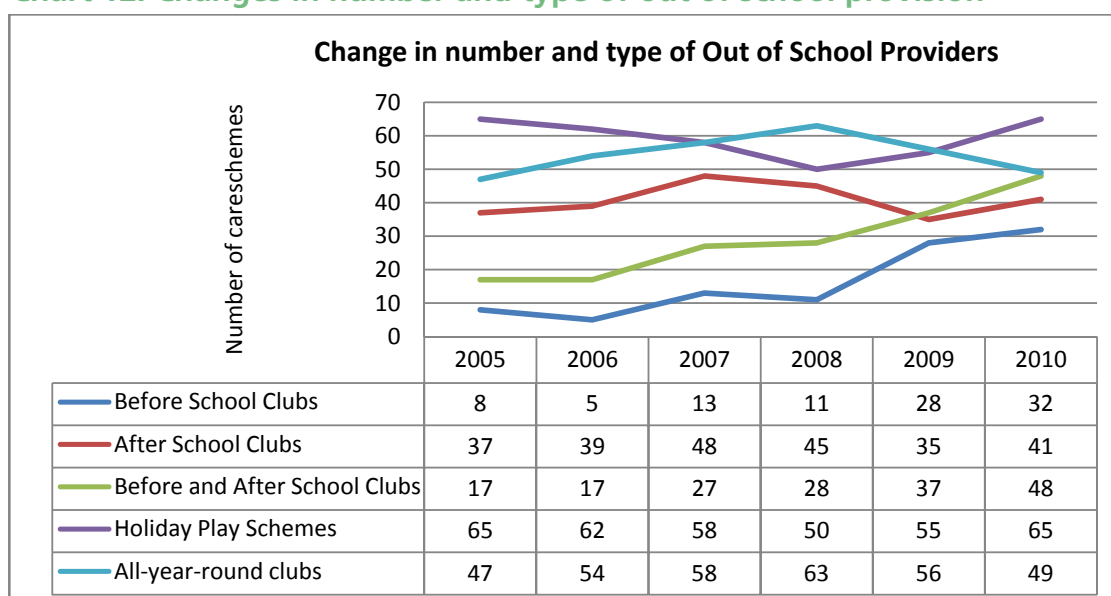
Chart 11: Change in percentage of childcare providers offering home-based versus group-based childcare provision



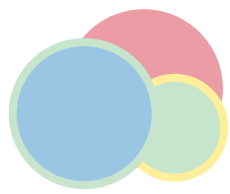
Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Based on the number of providers, as opposed to the number of places offered the split between group-based and home-based childcare provision has remained very stable and is the same as in March 2007, with 56% of all providers offering home-based childcare and 44% of providers offering group-based childcare.

Chart 12: Changes in number and type of out of school provision



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*



The greatest change in provision type and number of providers is seen in the provision of out of school childcare for primary aged children. The Childcare Sufficiency Assessment March 2007 highlighted an unmet demand for before and after school places and, as a result, the overall number of providers offering this type of childcare has continued to increase from 146 providers across Devon in March 2007 to 170 providers in March 2010.

There has been a significant rise in before school clubs over the last three years and, although the number of after school clubs appears to have decreased, it is likely that many of the existing clubs in 2007 only offering after school provision have expanded to develop before school provision and so are now classed as before and after school clubs.

For holiday provision there has been a steady increase in the number of providers offering holiday clubs, but a gradual decline of all year round clubs – those offering holiday care and term-time before and after school provision.

Table 12: The change in the percentage of childcare provision by childcare places available across Devon, by care type over the last five years

Devon		Under 3 years old	3 to 4 ½ year olds		4 ½ to 11 year olds		
Year	Primary schools	Under 3 year olds	Term-time daycare for at least four hours a day	Holiday daycare for at least four hours a day	Before school	After school	Holiday care
2006	299	17.75%	46.44%	24.28%	6.34%	7.82%	9.03%
2007	299	19.14%	57.02%	27.46%	5.81%	7.76%	8.35%
2008	294	19.20%	59.94%	28.42%	5.65%	8.10%	8.73%
2009	294	18.92%	56.78%	27.73%	6.84%	8.48%	9.18%
2010	294	18.71%	65.31%	30.56%	7.32%	9.01%	9.34%

Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Across Devon all levels of provision have increased since March 2007, except provision for under three year olds. This has decreased slightly as a result of a rise in the population of this age group by just under 6% since March 2007 and a decrease in childminder numbers which provide a significant proportion of the childcare available for this age group. Despite a similar rise in population of 3 to 4½ year olds (6.5%) the levels of term-time care which provide at least four hours of continuous care a day has increased significantly, and this is seen as a result of many existing providers expanding the hours of care they offer.

For primary aged children there has been a 3.7% decrease in the population since March 2007 and coupled with the increase in the number of providers for this type of childcare levels of provision have all increased.

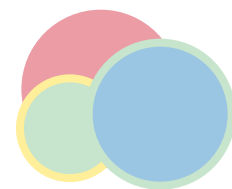


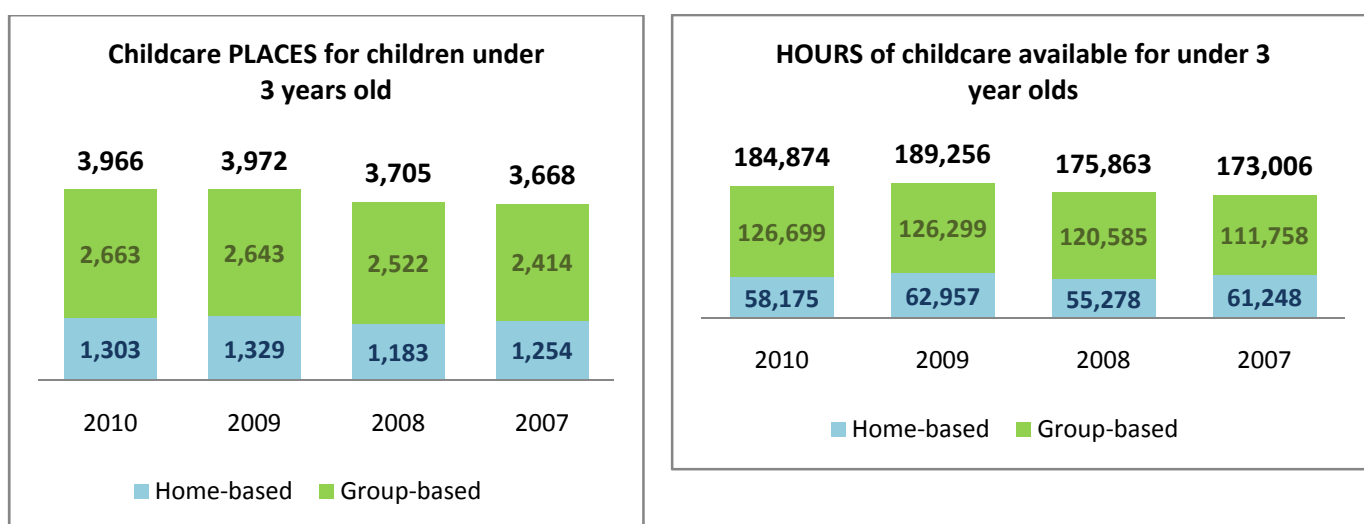
Table 13: The change in the population by age group across Devon over the last five years

Devon	0-2 year olds	3 to 4 ½ year olds	4 ½ to 11 year olds
2006	19990	11179	57281
2007	19998	10412	59658
2008	20047	10732	58922
2009	20715	11054	57945
2010	21156	11137	57461

Source: Early Years and Childcare Service Annual Childcare Audit 2010

Childcare for children under three years

Chart 13: Childcare provision for under three year olds

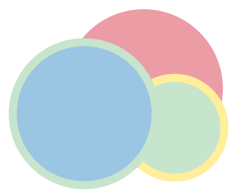


Source: Early Years and Childcare Service Annual Childcare Audit 2010

Overall, across Devon there has been a steady increase in the number of childcare places for under three year olds and the total number of hours of childcare available each week. In total there has been an increase of 190 places and just under 12,000 hours of childcare a week since March 2007.

Chart 13 examines the number of actual registered childcare places available for under three year olds and the resulting hours of care they provide each week.

For home-based childcare, despite a decline in the overall number of registered, active childminders and the number of hours each week of childcare they provide, the number of places they actually provide for this age group has increased since March 2007. One explanation for this change is that childminders need to care for a greater number of children to make their childminding business viable, and are also showing greater flexibility in the hours of childcare they offer.



In contrast, although group-based provider numbers have remained fairly stable over the last three years the number of places offered and the total number of hours offered each week have increased. Devon-wide the ratio between the number of hours per week of childcare provided by home-based providers versus group based providers has changed slightly since March 2007 with the majority of childcare hours remaining group-based (68.5%) showing an increase of just under 4% since March 2007 (64.6%).

However, a number of Learning Communities have seen more significant changes in the ratio of home versus group-based childcare hours. Overall, 23 out of the 29 Learning Communities have seen an increase in the percentage of hours of childcare available each week offered by group-based providers compared to home-based providers. The table below shows those learning communities with greater than 15% change.

Table 14: Learning Communities with the greatest change in home versus group-based provision for children under three years old

Learning Community	2007		2010		% change from home-based to group-based
	Home-based	Group-based	Home-based	Group based	
Chulmleigh	100.0%	0.0%	56.4%	43.6%	43.6%
Ottery St Mary	79.1%	20.9%	55.0%	45.0%	24.1%
Ivybridge	56.1%	43.9%	32.6%	67.4%	23.5%
Dartmouth	37.6%	62.4%	20.5%	79.5%	17.1%
Sidmouth	43.2%	56.8%	27.2%	72.8%	16.1%

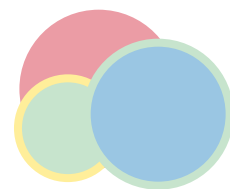
Source: *Early Years and Childcare Service, Annual Childcare Audit 2010*

Six Learning Communities showed a slight increase in the ratio of home versus group-based childcare provision hours per week; the highest being Holsworthy which showed a 6.6% increase in home-based provision and Exmouth at 3.9%.

Across Devon just over two-thirds of the hours of childcare provision available for under three year olds is provided by group-based providers. However, on a Learning Community basis this ratio varies widely.

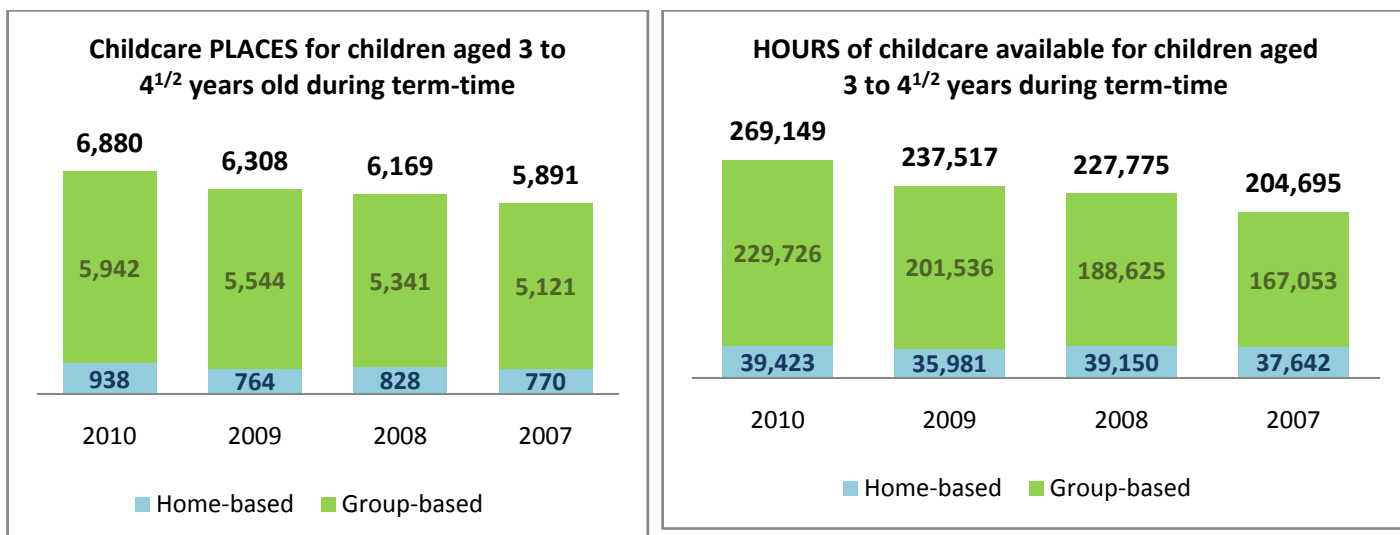
Devon has seen a 5.8% increase in the resident population of under three year olds since March 2007, but this has been offset by the creation of 298 additional childcare places for this age group and the overall level of childcare provision for under three year olds Devon-wide has remained fairly stable, providing just under one place for every five children.

The greatest increase in places is seen in Ivybridge (43 places), Braunton (31 places), South Dartmoor (28 places), Teign Valley (24 places) and Exmouth (21 places). In contrast, a decrease in places for this age group has been seen in Totnes (23 places), Exeter (17 places), Tavistock (15 places) and South Molton (15 places).



Childcare for children aged 3 to 4½ years

Chart 14: Childcare provision for 3 to 4½ years old during term-time



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

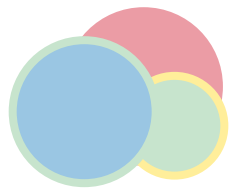
Over the last three years the number of places and the hours of childcare available have increased for term-time daycare which is at least four hours a day for 3 to 4½ year olds. Much of the increase in the hours available has been due to existing settings expanding their opening hours to offer at least four hours of continuous care each day.

The majority of childcare for this age group has remained group-based (86.4%) similar to that seen in March 2007 and this split between home versus group-based care has remained fairly consistent in most Learning Communities, with the exception of Honiton, Braunton and Torrington which have all seen a significant increase in the percentage of group-based provision. The greatest change is in Honiton with 72% of childcare available for this age group being group-based in March 2007 rising to 89% in March 2010.

The majority of Learning Communities have also seen an increase in the number of places offered for this age group. Exceptions are Exeter, Clyst Vale and Sidmouth which have all remained similar to the March 2007 levels. The greatest expansion in places has been seen in Exmouth (116 places), Barnstaple (97 places) and Honiton (91 places).

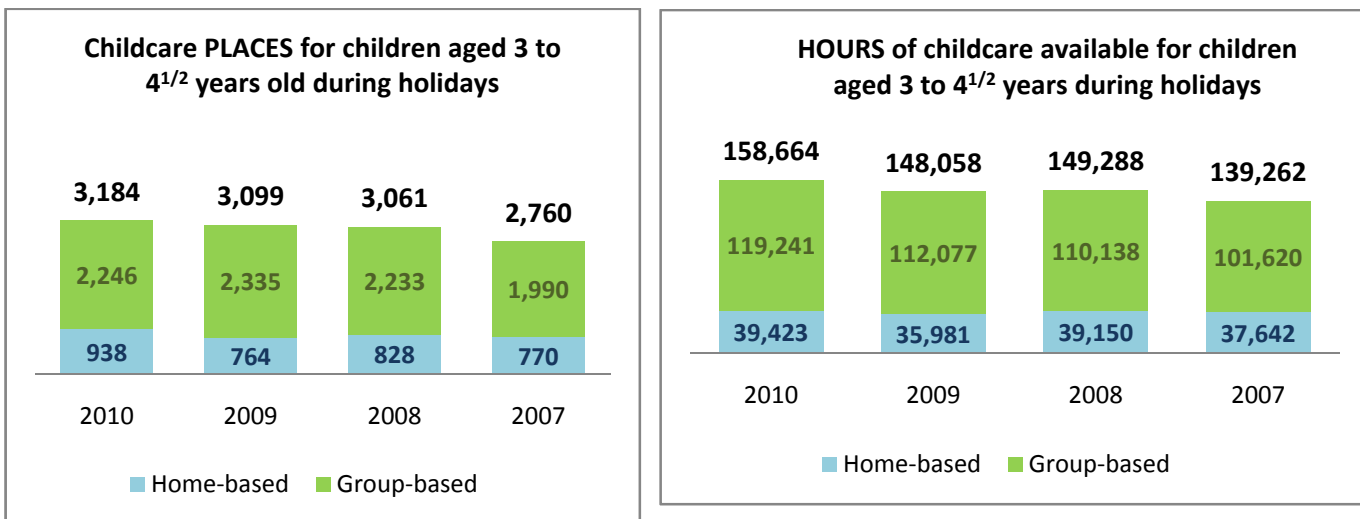
Across Devon there is in excess of an additional 64,000 hours of childcare available in March 2010 as compared to March 2007 for term-time care of children aged 3 to 4½ years. Only Clyst Vale Learning Community has very slightly less hours available in March 2010 compared to March 2007. Clyst Vale has seen few overall changes in childcare places or hours available for this age group over the last three years and only a small increase in the resident population of children in this age group.

The greatest increase in hours of childcare available during term-time for 3 to 4½ year olds is in Exeter, with more than 16,000 hours of childcare available each week. Although actual number of places available has remained similar to that seen in March 2007. Again this indicates providers are responding to parents and carers for additional flexibility in the number of hours of childcare available.



With a 7% rise in the population of 3 to 4½ year olds over the last three years the overall level of term-time provision for 3 to 4½ year olds which offers at least four hours of continuous care a day has increased from one place for every two children in March 2007 to two places for every three children in March 2010.

Chart 15: Childcare provision for 3 to 4½ year olds during holidays

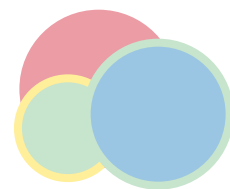


Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Although the level of provision for 3 to 4½ year olds during school holidays remains at half that seen during term-time, this provision has increased from just over one place for every four resident children to just under one place for every three resident children. Devon-wide an additional 473 places have been created over the last three years offering just under an additional 20,000 hours of childcare each week of the holidays.

The majority of holiday care for this age group remains group-based (70.5%), a level similar to March 2007. However, a number of Learning Communities have seen significant changes in the ratio of home versus group-based care for this age group. The greatest change has been seen in Chulmleigh which relied exclusively on home-based childcare during school holidays in March 2007, but is now showing a ratio in line with Devon with 75.5% of care available being group-based. Other Learning Communities showing an increase in the ratio of group-based care include Honiton, Dartmouth, Tavistock and Newton Abbot. In addition to this, a number of Learning Communities are also showing a significant increase in the ratio of home-based care, particularly Dawlish, Exeter and Holsworthy.

The greatest increase in places available is seen in Tavistock (214 places), Newton Abbot (51 places), Exmouth and Chulmleigh (40 places). However, there are also a number of Learning Communities which have less places available than in March 2007, the highest is Tiverton (43 places)



Early Years Entitlement

Introduced in 2010, every child from the term after their third birthday until they start school, is entitled to 15 hours free early learning and childcare for up to 38 weeks a year. The 15 hours must be used over a minimum of three days, with a maximum of 10 hours per day and can be shared between two providers.

There have been several changes to early years funding in the last two years.

- In summer term 2009, Devon changed from recording funding in sessions to hours. Settings could offer up to five 2.5 hourly sessions each week; the change to hours enabled settings to offer anywhere from 2 to 12.5 hours each week although hours needed to be recorded to the nearest half hour. What was referred to as Early Years Education Funding now became known as the Early Years Entitlement.
- In autumn term 2009, some settings were offered the opportunity of extending the number of fundable hours to 15 per week.
- In summer term 2010, a single funding formula was introduced and applied to all early years providers across the voluntary, private and maintained sector.
- In summer term 2010, all settings were offered the opportunity of extending the number of fundable hours to 15 per week.

Upcoming changes.

- The single offer point will be introduced in September 2011. This will mean that all primary and infant schools must offer full time admission to reception from the beginning of the September term following a child's fourth birthday.
- Early Years Funding for two year olds will mean the most disadvantaged 2 year olds in the country will be entitled to 15 hours free early learning and childcare each week. There are no more details about the criteria for selecting the children or when the funding will commence.

Devon population of 3 and 4 year olds

The number of 3 and 4 year olds living in Devon has increased steadily since 2006. Table 15 shows the population of Devon 3 and 4 year olds as at 1 September registered with local health authorities. The increase in population is due to a slight rise in the number of births in Devon but more significantly, by an increase in the net migration of 3 and 4 year olds into Devon.

Table 15: Population of 3 and 4 year olds in Devon (2006 to 2009)

Year	3 year olds	4 year olds	Total
2006	6859	6627	13486
2007	7007	7033	14040
2008	7172	7070	14242
2009	7357	7342	14699

Source: South Devon Health Informatics Service (FHSA)

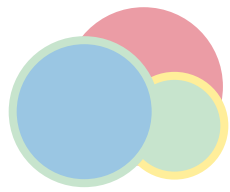
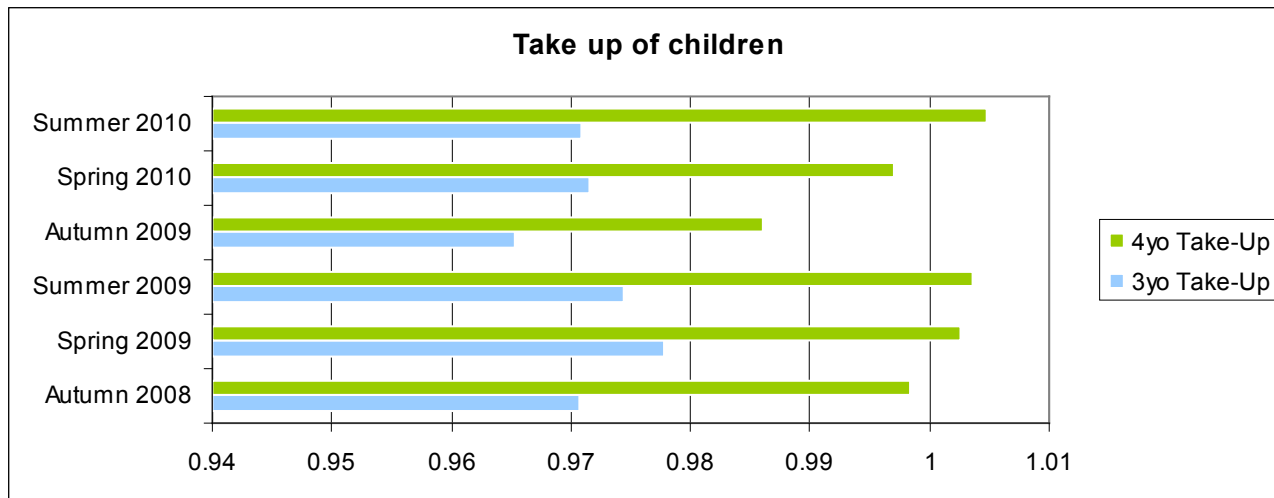


Chart 16: Take up of Early Years Entitlement



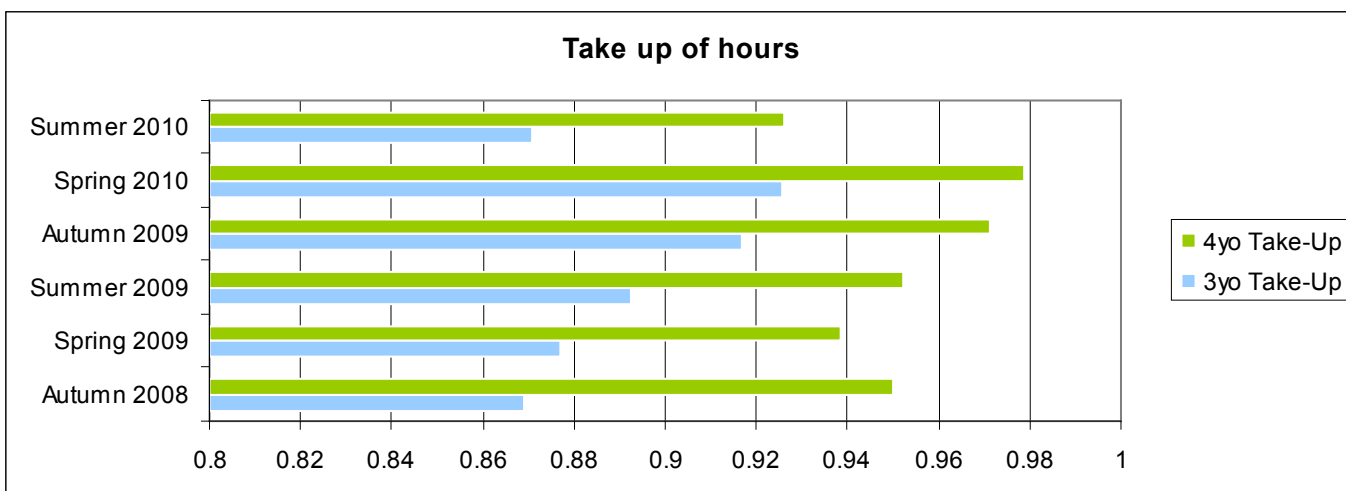
Source: *Early Years and Childcare Service, Devon County Council*

Chart 16 shows the take up of the Early Years Entitlement by 3 to 4½ year olds in relation to the number of 3 and 4 year olds living in Devon based on population data from the autumn term. The number of funded 3 to 4½ year olds refers to all children funded at each Devon setting; this will include children living in other authorities but attending Devon settings. It may also include children that have recently migrated to Devon who don't appear on the health authority population data.

The take up figures are very high, for 4 year olds over 98% and for 3 year olds over 96%. Due to Devon's positive net migration rate the population shown may be a little lower than the actual number of children living in Devon at that time and the take up exceeds 100%.

The chart does show that the vast majority of 3 to 4½ year olds do access their free entitlement. The section on non-attendance provides a more accurate analysis of the take up in Devon. In Devon approximately four times as many 3 to 4½ year olds attend settings in the private, voluntary and independent sectors as compared to the maintained school sector to access their free entitlement.

Chart 17: Take up of Early Years Entitlement hours



Source: *Early Years and Childcare Service, Devon County Council*

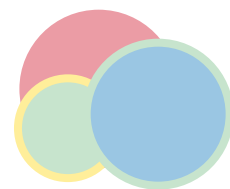


Chart 17 shows the take up of hours of all funded children at Devon settings over the last six terms. A 100% take up figure would mean that every child attended for the maximum funded hours each week. For 4 year olds take up of hours is over 92% and for 3 year olds over 87%.

There have been several changes in the last two years that have affected the take-up percentage. In summer term 2009, Devon changed from recording funding in 2.5 hourly sessions to hours. This added flexibility led to a noticeable increase in the take up percentage for 3 to 4½ year olds. In autumn term 2009, some settings were offered the opportunity of extending the number of fundable hours to 15 each week. As all settings were not given the opportunity of the extended entitlement, take up was still based on 12.5 hours each week. However, delivering the extended entitlement to some settings led to a further substantial increase in the take up of hours for 3 to 4½ year olds.

In summer term 2010, all settings were given the opportunity of offering 15 funded hours each week, so the calculation of the take up of hours was, for the first time, based on a maximum of 15 hours each week. This is shown in the reduction of the take up percentage for both 3 and 4 year olds. Some settings were still not offering the extended entitlement in summer term 2010, either because they were not open for the required number of hours or because they opted out. It is expected that in autumn term 2010 and in subsequent terms, more settings will be offering 15 funded hours each week.

Number of early years places available

Table 16 shows the number of early years places available across the county at the start of autumn term 2009. This is based on an early years place being equivalent to 12.5 hours each week. It shows that pre-school playgroups provide almost half (48.5%) the number of places available, with specialist childminders only providing a small (0.7%) number of places.

Table 16: Early years places available at Devon settings by registration (autumn 2009)

Registration type	Number	Places available
Day nurseries	99	3232
Independent schools	25	1024
Maintained nurseries or nursery schools	55	2864
Pre-school playgroups	253	7328
Private nursery schools	17	554
Specialist childminders	28	106
Devon total	477	15108

Source: *Early Years and Childcare Service, Devon County Council*

From summer term 2010, all settings were able to offer 15 hours funding each week for 3 and 4 year olds. Table 17 shows that more than 1 in 5 pre-school playgroups (20.9%) were not able to open for 15 hours a week. This means that children would have to attend more than one setting to access their full early years entitlement. Some settings were open for more than 15 hours a week, but declined to offer the extended funding in summer term 2010. However, it is likely that they will offer the full 15 hours in upcoming terms.

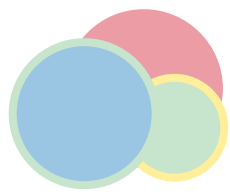


Table 17: Hours analysis by registration (autumn 2009)

Registration type	Open for less than 15 hours	Open for 15 hours or longer	Total settings
Day nurseries	—	99	99
Independent schools	—	25	25
Maintained nurseries or nursery schools	—	55	55
Pre-school playgroups	53	200	253
Private nursery schools	1	16	17
Specialist childminders	—	28	28
Total	54	423	477

Source: Early Years and Childcare Service, Devon County Council

Appendix 5 shows the estimated number of early years places available in each Learning Community compared to population, based on a funded place being equivalent to 12.5 hours each week. The number of 3 to 4½ year olds needing a place assumes 50% of the 4 year olds will be in reception class in school. The table shows that every Learning Community has sufficient early years places. However, from summer term 2010, when settings will be able to offer 15 funded hours each week, the number of available places may decrease. We are currently obtaining opening hours information from settings.

The single offer point which will be introduced in September 2011 will mean that all 4 year olds will be able to start school in the autumn term after their fourth birthday. This will mean that the number of 4 year olds needing an early years place will be reduced. As there are already sufficient early years places available, this may lead to some settings struggling to be sustainable. However, the proposed introduction of the 2 year old entitlement could mean that some settings may be able to compensate for the loss of 4 year olds with income from 2 year old funding.

In each Learning Community, the number of places is more than sufficient. In some learning communities, such as Ivybridge and Kingsbridge, attendance is less than 50% of the number of early years places available.

In all the Learning Communities in Devon, if every child accessing a setting took up their full entitlement, there would still be sufficient places.

Early years non-attendance

Table 18 compares the early years attendance by district over the last two school years. It shows an increase in attendance over the last year, but there were still 500 children aged 3 to 4½ years (3.44% of those eligible) not accessing the early years entitlement in 2009/10. All terms have shown an increase in attendance from 2008/09 to 2009/10 apart from Torrington, where there was a slight fall.

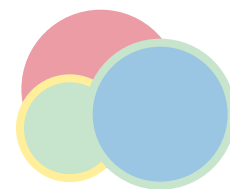


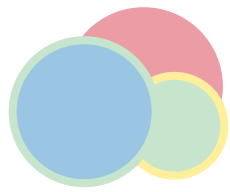
Table 18: Early years attendance by district

District	2008/2009			2009/2010		
	Accessing entitlement	3/4 year olds total	3/4 year olds attendance	accessing entitlement	3/4 year olds total	3/4 year olds attendance
East Devon	2156	2236	96.42%	2210	2285	96.72%
Exeter	2258	2345	96.29%	2397	2484	96.50%
Mid Devon	1535	1590	96.54%	1660	1707	97.25%
North Devon	1852	1927	96.11%	1894	1948	97.23%
South Hams	1369	1458	93.90%	1401	1481	94.60%
Teignbridge	2259	2330	96.95%	2381	2451	97.14%
Torridge	1115	1147	97.21%	1170	1212	96.53%
West Devon	917	975	94.05%	933	978	95.40%
Devon Total	13461	14008	96.10%	14046	14546	96.56%

Source: Early Years and Childcare Service, Devon County Council

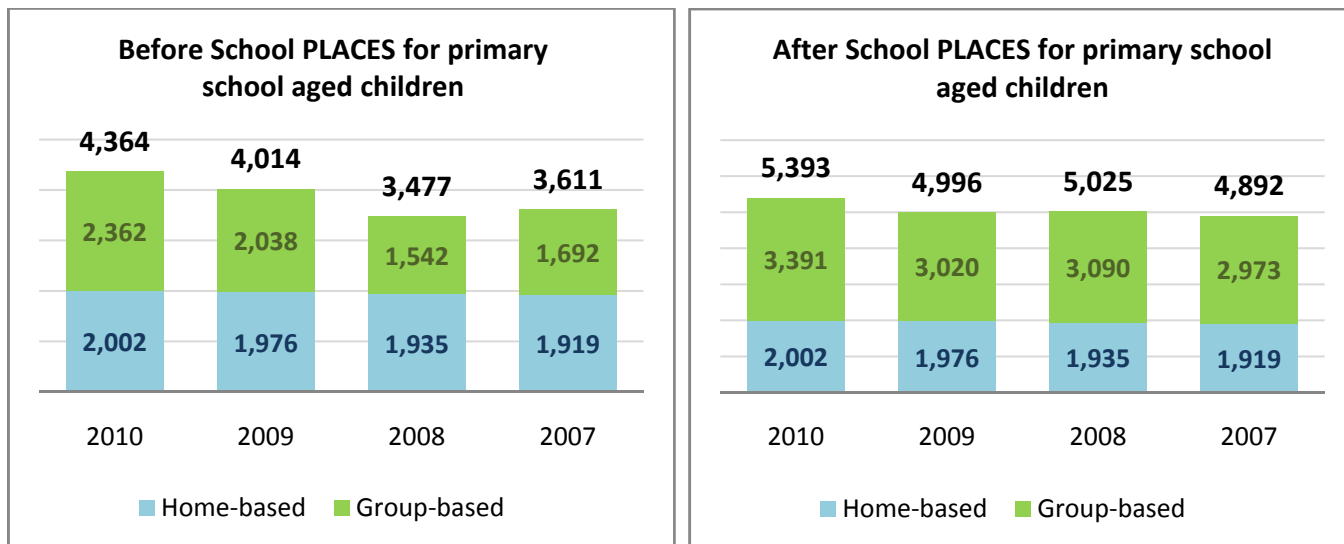
In 2009 and 2010 parents of children in reception classes who did not access the early years entitlement were sent a questionnaire asking why their child did not access funded settings. 218 parents were sent questionnaires in 2008/09 and 174 in 2009/10. There were 101 responses (46.3%) in 2008/09 and 79 responses (45.4%) in 2009/10. The most common response in both years was that the child was living in another county, attended a funded setting there and had subsequently moved to Devon to start school. A small proportion of parents were home-educating their child or did not want their child to attend a setting. Very few parents were unable to find a place for their child.

For the small numbers of 3 and 4 year old children in care (less than 30) the take up rates of the free entitlement in 2009 and 2010 were higher than for all funded 3 and 4 year olds in Devon. This information is measured termly and any children in care not accessing their free entitlement are followed up.



Childcare for school-aged children

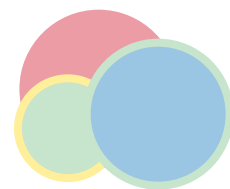
Chart 18: Changes in number of places for before and after school provision for primary aged children



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

The number of places available and the number of hours available for out of school provision for primary aged children has increased steadily since March 2007. Devon County Council has been very active in this area, providing support through Sure Start Grants to aid the development of out of school provision. Since 2004, approximately 124 clubs with 84 different childcare providers have been set up for out of school provision.

For before school provision the split between home-based and group-based care has remained fairly stable, although group-based care is now slightly higher than home-based care, providing 54% of all available provision. On a Learning Community basis there is a high degree of variation with Axe Valley, Tiverton and Crediton all relying on group-based out of school provision to supply the majority of provision (over 70%) and four Learning Communities, Dartmouth, Holsworthy, Teignmouth and South Molton, relying solely on home-based out of school provision.



Overall, there has been a total net increase of 751 before school places across Devon since March 2007. The greatest expansion has been in Exeter (276 places), Culm Valley (118 places), Barnstaple (90 places) and Exmouth (70 places). In contrast an overall net loss of before school places has been seen in South Molton (56 places), Ilfracombe (56 places), Totnes (37 places) and Teignmouth (34 places).

For after school provision the split between home-based and group-based provision has remained fairly stable, with a slight increase in the level of group-based provision which now provides 63% of all after school provision. A similar range of variation is seen in the Learning Communities as seen in before school care. A number of Learning Communities, Crediton, Tiverton, Exeter, Teignmouth and Axe Valley, rely on group-based out of school provision to supply the majority of provision (over 70%). Only one Learning Community, Holsworthy, now relies solely on home-based provision for its after school care.

Table 19: Learning Communities with less than one place per 15 children for after school care

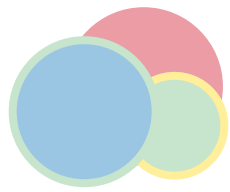
Learning Community	% after school provision
Ilfracombe	5.1%
Dartmouth	6.2%
Holsworthy	2.0%

Source: Early Years and Childcare Service Annual Childcare Audit 2010

In March 2007, ten Learning Communities had less than one after school place for every 15 resident children. In March 2010 this has dropped to only three Learning Communities.

Overall there has been a net increase of 577 after school places across Devon since March 2007. The greatest expansion has been seen in Exeter (306 places), Okehampton (78 places), Barnstaple (68 places) and Axe Valley (63 places). Again a net loss of after school places has been seen in a number of Learning Communities including Ivybridge (61 places), Tavistock (41 places) and South Molton (40 places).

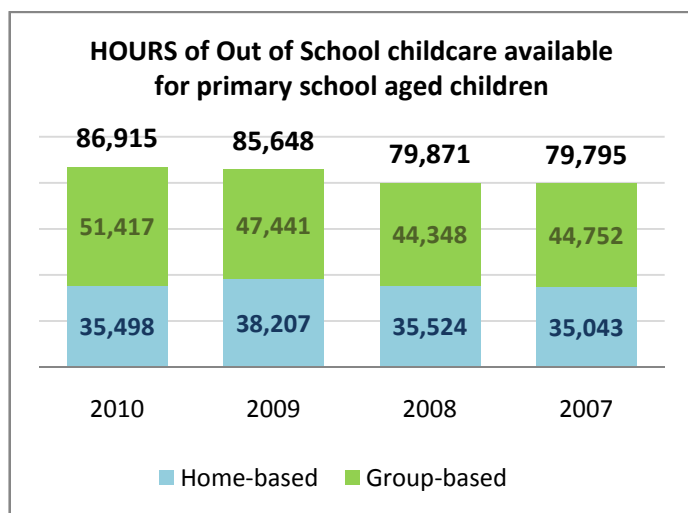
With a minor (less than 1%) decrease in the resident population of primary aged children across Devon the overall levels of provision for before school care have increased this year to just under one place for every 14 children, as compared to just under one place for every 18 children at March 2007. For after school provision, just under one place for every 13 children has increased, in March 2010, to one place for every 11 children.



An analysis completed by the Early Years and Childcare Service in 2010 assessed the viability of new childcare provision which had been given start-up grants in the out of school sector. This revealed a distinct difference between the northern districts and the rest of Devon in terms of sustainability and viability. Just over 40% of the new clubs set up in northern Devon closed through lack of take up of places in the before and after school sector, compared to 13% in the eastern part of Devon and 16% in the southern part. Holiday care was more successful with few of these clubs closing in the northern area reflecting the seasonal nature of work in this area.

The report also highlighted the poor viability and the increased risk of closure of new groups set up in the more disadvantaged parts of Devon. Over half of these new funded groups closed, most within the three year funding period.

Chart 19: Change in hours for before and after school childcare provision per week for primary aged children



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

For combined out of school provision for primary aged children there has been in excess of an additional 7,000 hours of new childcare available in March 2010 as compared to March 2007. The majority of Learning Communities have seen an increase in hours of childcare available with only a handful showing a decrease including Ivybridge, South Dartmoor, South Molton, Totnes and Ilfracombe.

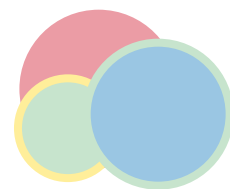
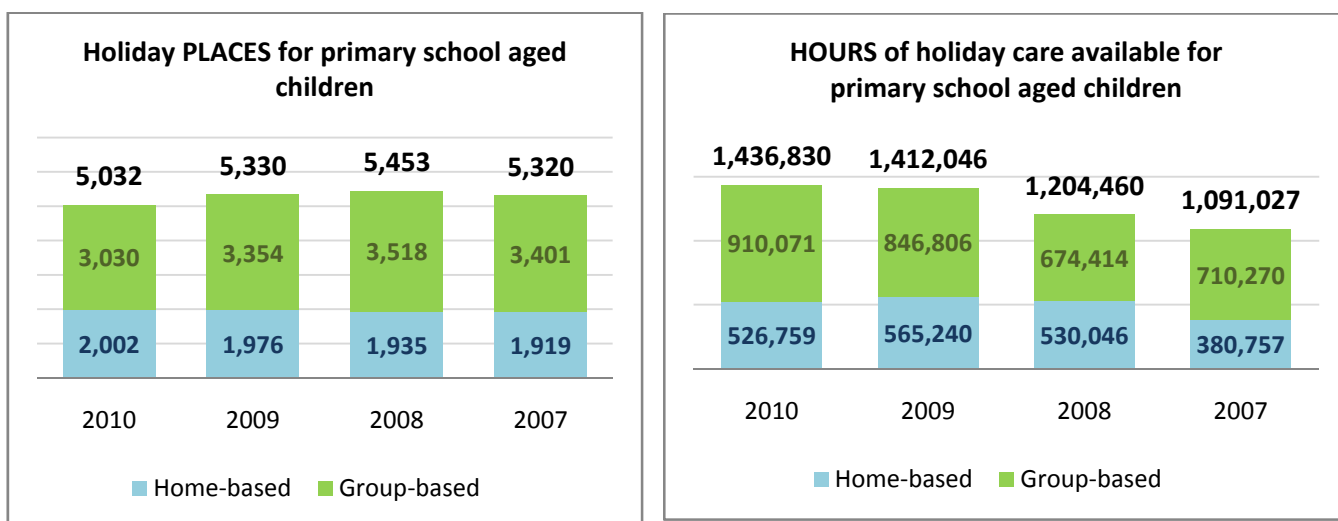


Chart 20: Changes in number of places and hours for holiday provision for primary aged children



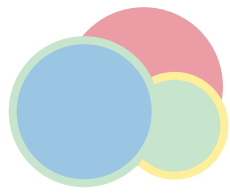
Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Across Devon, the number of holiday places for primary aged children has declined since March 2007, with an overall net loss of 273 places. However, the hours of childcare available has increased; suggesting that providers of holiday care are opening for longer hours.

The majority of holiday care has remained group-based (60%) which is slightly lower than that seen in March 2007 (64%). As with out of school provision there is a wide variation in home versus group-based provision across the Learning Communities, ranging from over 80% of available holiday care being group-based in Dartmouth and South Molton to Chulmleigh, where all available holiday provision for primary aged children is home-based. The greatest changes in home versus group-based provision has been seen in Chulmleigh, where the level of provision that is group-based has dropped from 70% to 0%. Other Learning Communities showing an increase in the ratio of home-based provision include Torrington, Exeter and Ilfracombe. In contrast a number of Learning Communities have shown an increase in the ratio of group-based provision including Dartmouth, South Molton, Totnes, Teignmouth, Kingsbridge and Okehampton. The greatest increase in holiday places has been seen in Totnes (89 places), South Molton (66 places) and Okehampton (54 places).

There are a number of Learning Communities showing a decrease in holiday places. In particular Exeter, with the overall net loss of 377 places since March 2007. It is worth noting that a decrease in places has not translated into a decrease in hours of childcare available in Exeter.

A review of extended services provided in Devon primary schools showed that many of the smaller schools do not run out of school activity clubs. They report that either there is no demand for them or they are unsustainable. A large proportion of schools report this is due to issues with transport. Some primary schools that are geographically close often work together to provide an out of school club or signpost to one of the schools in the area. Other schools signpost to local provision, including leisure centres.

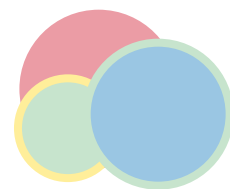


Some of the primary schools do run out of school activity clubs for 5 to 11 year olds which usually operate until 4.30pm or 4.45pm. Most schools offer a limited choice with clubs only running on 2, 3 or 4 nights a week, but do report that the clubs run consistently with contingency plans in place. The majority of clubs are free, however some primary schools charge a small fee for their after schools clubs - usually between £1 and £3. There are some schools which run clubs later than 4.45pm, but these may incur charges.

Most formal childcare in Devon is provided for children aged up to 11 years of age, but childminders and out of school providers will take 12 year olds if appropriate. Since 2007, we worked closely with Devon Youth Service to provide opportunities for childcare for this age group by opening youth centres for the period immediately after school ends. Pilot projects were set up in Bideford, Exeter and Holsworthy. A project also runs in Tiverton. These projects have proved successful.

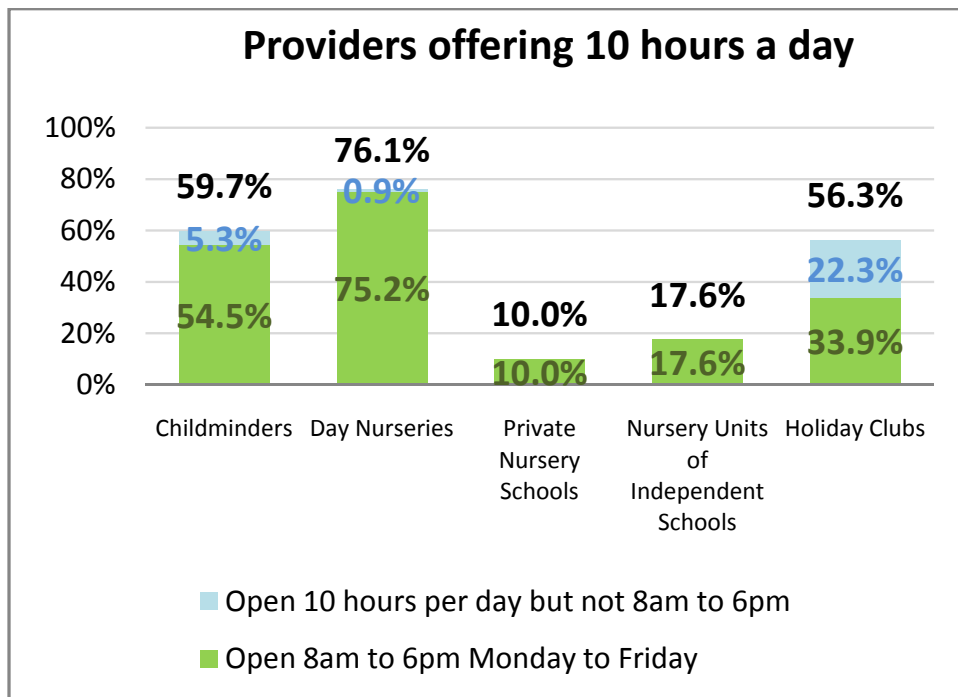
In addition, secondary schools in Devon offer a wide variety of before and after school care for students aged 11 to 16 years. Some secondary schools provide late buses for children not living in the immediate area, for others the high number of students who travel home by bus limits the amount of after school provision that can be provided.

Availability of childcare



The following data looks at childcare settings which are providing childcare for children to cover a 'normal working week', considered to be 8am to 6pm, five days a week. Chart 21 shows the percentage of providers by care scheme type offering 8am to 6pm childcare cover. In addition to this, providers who offer at least 10 hours a day, but not specifically 8am to 6pm are also shown.

Chart 21: Full day care providers open 8am to 6pm, 5 days a week



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Just under 60% of all childminders offer at least 10 hours a day of childcare. The majority of those offering this provision (54.5%) cover at least 8am to 6pm every week day. In addition, a smaller number (5.3%) open for at least 10 hours a day but not specifically between 8am to 6pm. Overall, the proportion of childminders offering at least 10 hours of childcare a day has remained similar to last year.

Just over three quarters of all private day nurseries are now open between 8am to 6pm, five days a week, an increase since last year. A small proportion have opening hours of at least 10 hours a day, but not specifically between 8am and 6pm (1%).

A smaller percentage of private nursery schools and nurseries of independent schools offer childcare between 8am and 6pm, although they represent a relatively small proportion of the overall childcare provision available. The percentage of nursery units of independent schools has increased since last year from 15.8% to 17.6% now offering childcare from 8am to 6pm.

The greatest increase in the provision of childcare offering at least 10 hours a day has been seen in holiday clubs. This has doubled since last year to over 56% of all holiday clubs. The majority of the clubs (34%) are open between the hours of 8am to 6pm during school holidays, the remainder (22%) open for at least 10 hours a day but not specifically 8am to 6pm.

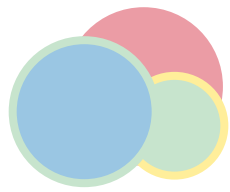
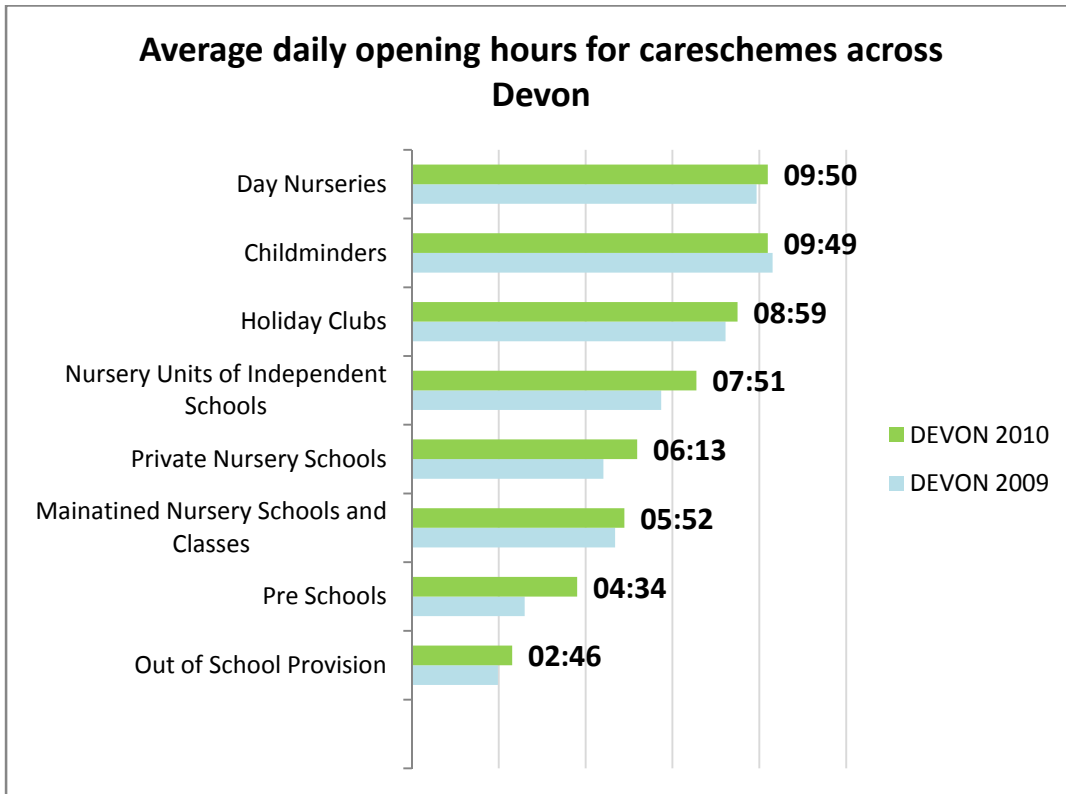


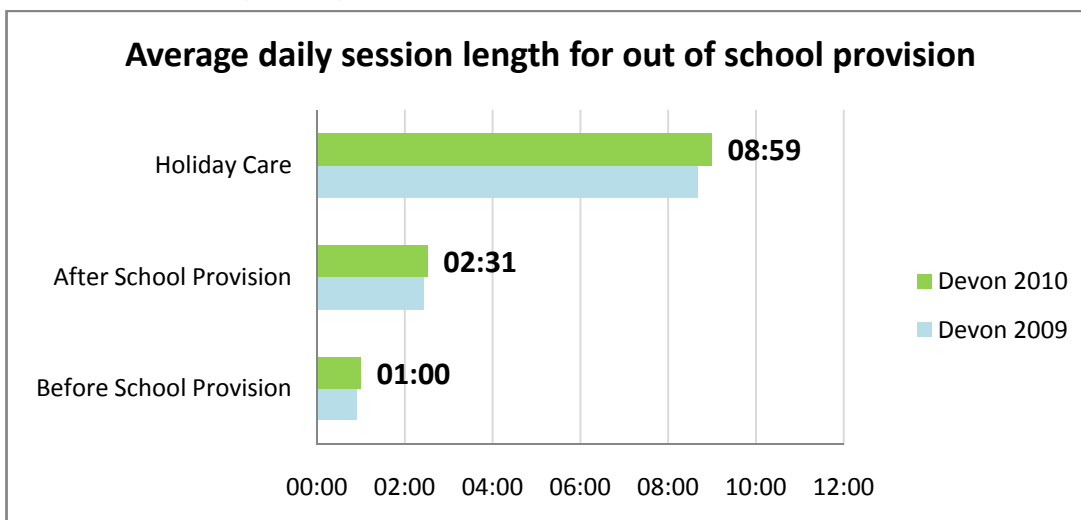
Chart 22: Average daily opening hours by care scheme type



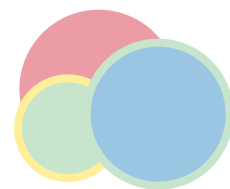
Source: Early Years and Childcare Service, Annual Childcare Audit 2010

Chart 22 shows the average opening hours per day by provider type. Overall the average opening hours for all provider types have increased except for home-based childminders, although their opening hours have remained high at just under 10 hours a day, on average. The greatest increase in average opening hours has been seen in voluntary pre-schools increasing from just over 3 hours a day to just over 4½ a day. This is due to many pre-schools now offering lunch clubs and thus extending their opening hours to provide more than 4 hours of continuous childcare each day.

Chart 23: Average length of session for out of school care



Source: Early Years and Childcare Service, Annual Childcare Audit 2010



The same trend has been seen in out of school provision, an overall increase in opening hours for both holiday and out of school provision for primary aged children, although the increase seen is generally fairly small. The average opening hours for holiday clubs is now 9 hours a day, for after school provision 2½ hours a day and 1 hour for before school provision.

Parents' views on the number of childcare places and the availability of childcare

In the Hemsall's research 39% of respondents (783) felt that there were enough childcare places in their local area. Only 1% (22 respondents) felt there were too many places and nearly a third (32%) felt that there were not enough childcare places.

Just over a quarter of respondents (28%) were unable to offer an opinion - 35% of all respondents surveyed were not using any form of childcare and the relatively high percentage of 'don't know' responses may reflect this. These findings are similar to those reported nationally¹¹, where 42% of parents thought that there were about the right number of childcare places in their local area, 34% thought there were not enough, 1% thought there were too many and 23% reported that they were unable to offer an opinion.

The majority (55%) of those that commented felt there were enough childcare places. The proportion of respondents reporting the number of childcare places locally is about right has increased from 35% in 2008 to 39% in 2010.

Respondents living in town and rural fringe areas were more likely to report too few childcare places in their local area. Responses showed a similar pattern across all age ranges although there is a decreasing percentage of respondents' reporting the right number of places associated with increasing age of child.

Parents and carers with a disabled child, or a child with additional needs were more likely to report too few childcare places in their local area than all parents and carers. 49% of respondents caring for a disabled child or child with additional needs stated there were not enough childcare places in their local area. Adjusting for respondents who were unsure, or who declined to answer the question, this increased to 61%.

While relatively high proportions of respondents report thinking that there are too few childcare places in their local area, the majority of those using childcare are satisfied with their current arrangements and a high proportion of those not currently using childcare do so out of choice.

Over a third of all respondents did not use any childcare (35%, 706 respondents), WHILST 65% of all respondents (1,290 respondents) do use childcare; 29% (583 respondents) use informal childcare only, 18% use formal childcare only and 18% use a mix of formal and informal childcare.

¹¹ Childcare and Early Years Survey of Parents 2009, Department of Education Re: DFE-RR054

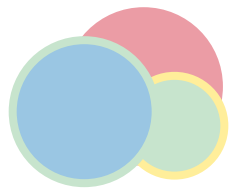
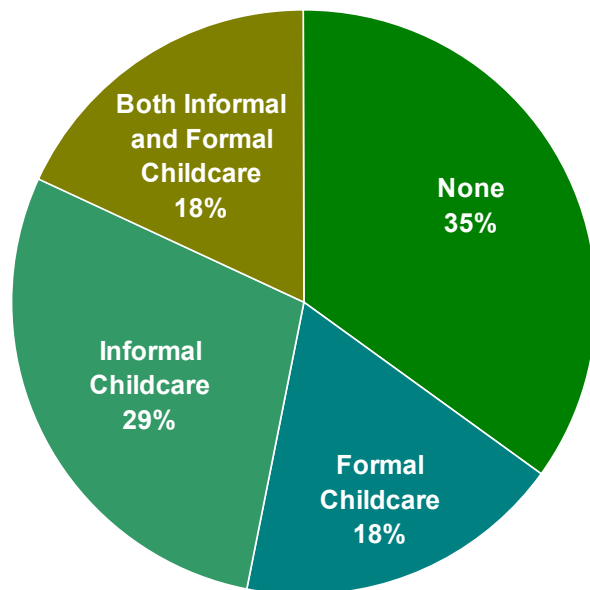


Chart 24: Use of childcare



Source: Parent and Carer Survey, Hemsall's March 2010

Note - Base 2,000: percentages rounded

Patterns of childcare use are broadly similar across all community types; however findings suggest a greater reliance on informal childcare in urban communities compared to overall.

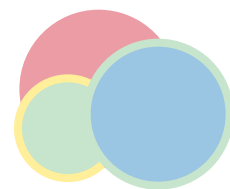
Use of childcare was analysed for working and workless households. A workless household is defined as one where there are no adults of working age in paid employment. Note: the base for workless households according to this definition is relatively low (162) and therefore findings should be regarded as indicative only.

A much higher proportion of workless households did not use any form of childcare at the time of the survey. Levels of use of formal childcare were in line with overall, however levels of use of informal childcare and a mix of formal and informal childcare were much lower than the average.

A higher proportion of parents and carers with younger children used any form of childcare, but use of formal childcare was particularly high compared to the average for parents and carers with children aged 3-4 years old. This reflects the use of the free early years entitlement. Fewer parents and carers of older children reported using formal childcare (formal childcare use decreases with the age of child) and a greater proportion reported using informal childcare, or no childcare.

Data suggests a relationship between use of childcare and household income: a higher proportion of households with an annual income of less than £20,000 were not using childcare, formal or informal, at the time of the survey. Of the 65% of respondents that were using some form of childcare all used childcare during term time and 59% (765 respondents) used holiday childcare.

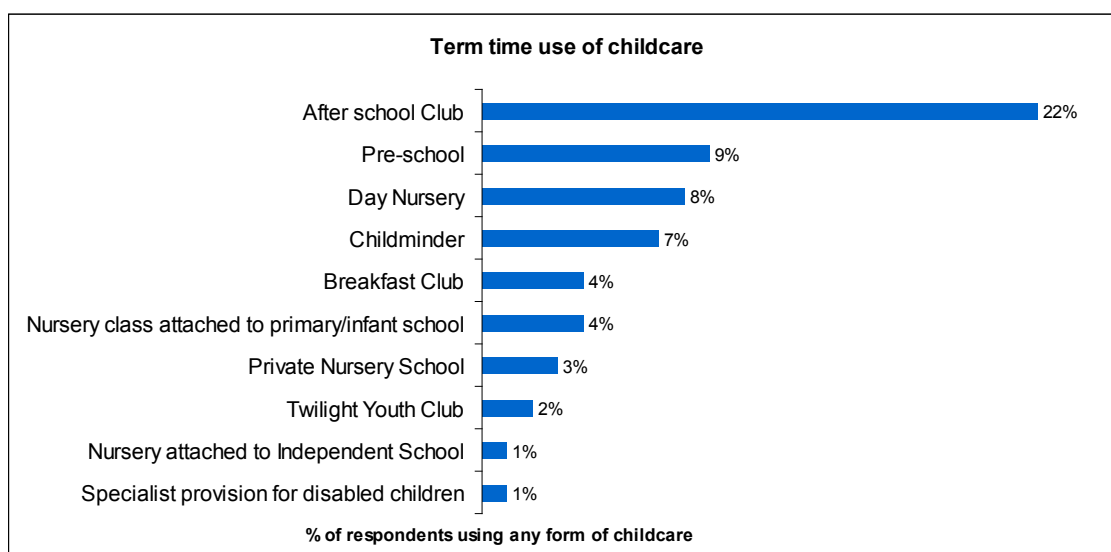
Extended families, in particular grandparents, play an important role in childcare arrangements during term time and during the school holidays. Just under half of all parents and carers using informal care rely on grandparents for their childcare, often in conjunction with other forms of childcare.



Only one in five parents of secondary age children use formal childcare, half the level used by parents of primary aged children. No forms of childcare, either formal or informal, were used for over 40% of children in this age group, with parents having the view that their child was old enough to look after themselves.

95% of parents of 11-14 year olds were satisfied with their current childcare arrangements. For those not using formal childcare, even if suitable and affordable childcare was to be found, 72% of these parents would not use it.

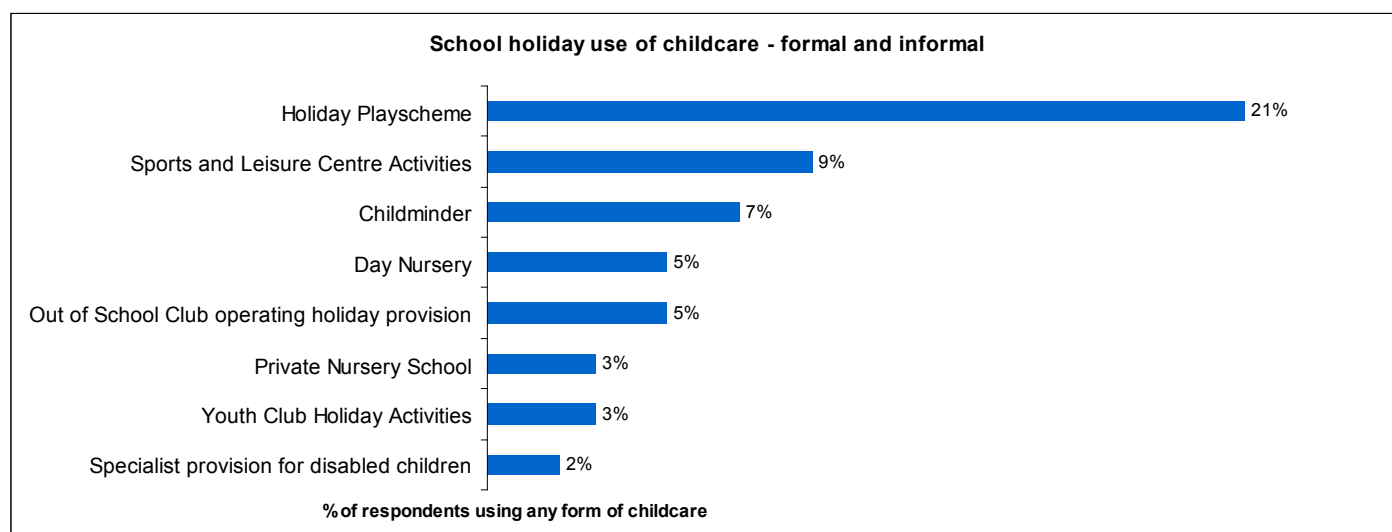
Chart 25: Term time use of childcare - formal childcare



Source: Parent and Carer Survey, Hemsall's March 2010

Note - Base all users of term time childcare 1,294: percentages rounded. Multiple responses. Base users of formal childcare and formal/informal childcare only 710. The most commonly used type of formal childcare used in the school holidays is holiday club or playscheme provision, cited by 21% (162 respondents) using childcare.

Chart 26: School holiday use of childcare - formal and informal



Source: Parent and Carer Survey, Hemsall's March 2010

Note - Base all users of holiday childcare during the school holidays 765: percentages rounded. Multiple responses

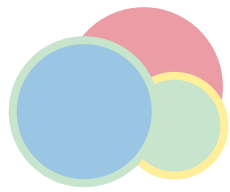
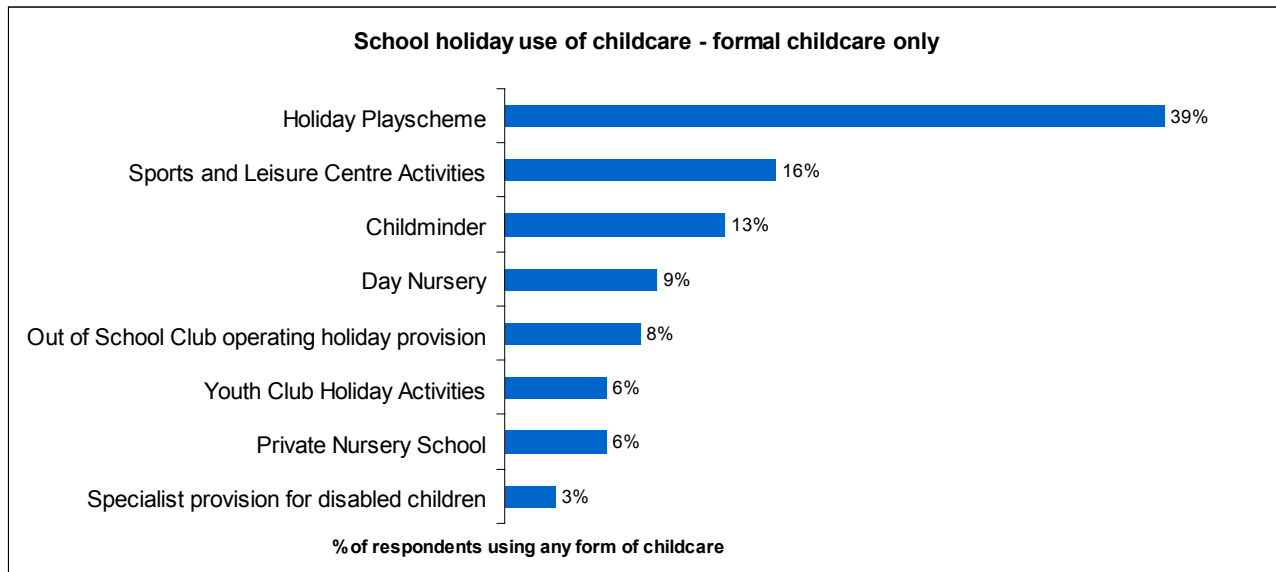


Chart 27: School holiday use of childcare – formal

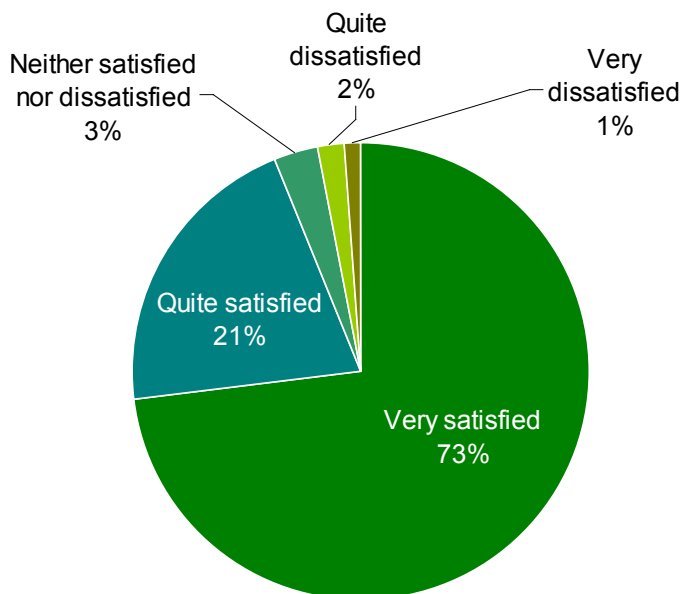


Source: Parent and Carer Survey, Hemsall's March 2010

Note - Base users of formal childcare and formal/informal childcare only 390

It is important to note that a high proportion of parents and carers (35% overall) were not using any form of childcare. Of those that were using some form of childcare (formal or informal or both) 95% (1,166 respondents) were satisfied with their childcare arrangements.

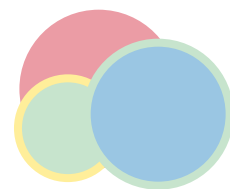
Chart 28: Overall satisfaction with current childcare arrangements



Source: Parent and Carer Survey, Hemsall's March 2010

Note - Base 1,238 excludes non responses: percentages rounded.

Nearly two-thirds of all respondents (64%, 1,290 respondents) were not using formal childcare at the time of the survey. A large proportion of those families were using informal childcare (45%, 584 respondents) and very few indicated that a lack of available childcare or childcare quality was a barrier to take up.

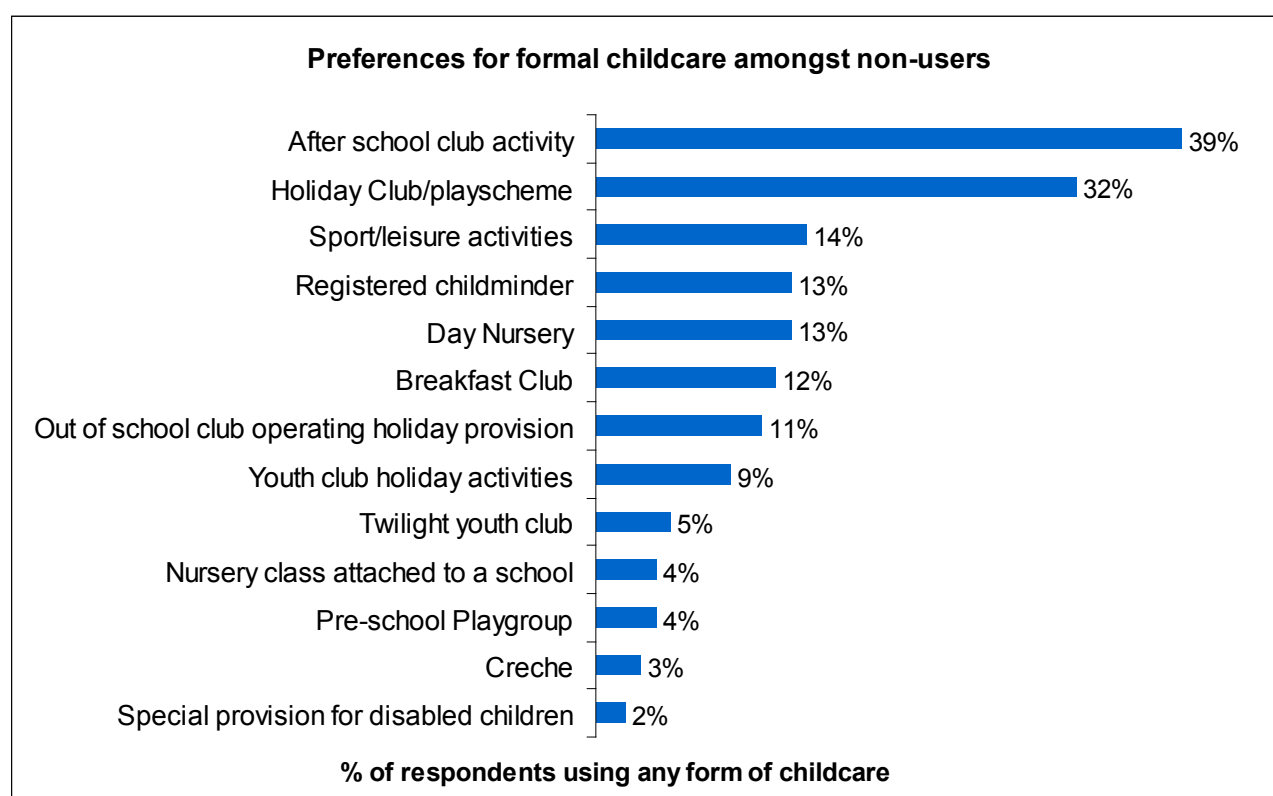


Respondents were asked the reason or reasons why they did not access formal childcare. For the majority (49%, 627 respondents) one parent was always at home to care for the child/ren. 38% (487 respondents) expressed a preference for looking after their child/ren themselves and 23% expressed a preference for the child/ren to be looked after by someone familiar.

Respondents who were not using formal childcare were asked if suitable and affordable formal childcare were available, would they use it. The majority (61%, 784 respondents) would not - this suggests that not using formal childcare is a preference for the majority rather than a reflection of barriers to take up. This suggests that of those who are not using any formal childcare, 61% do so by choice - they would not use formal childcare even if suitable and affordable care were available.

For those not using formal childcare who would consider it if available to them the majority would consider using out of school and holiday provision - including youth club activities and sport and leisure activities.

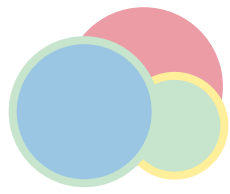
**Chart 29: Preferences for formal childcare among non-users
(only responses with greater than 1% of respondents citing are shown)**



Notes - Base 477; percentages rounded. Multiple responses

Children's views on the availability of childcare

In discussion with children it was apparent that their childcare arrangements after school are often very complex. For some children they varied from day to day while others were more consistent. Across all age groups the most common arrangement after school was for children and young people to be at home with their parent or carer.



Children from the age of 8, and this increased with age, were much more likely to be either cared for outside of the home which could include being at a friends home or at an after school club or school activity. Increasing independence of secondary age young people is demonstrated by the proportions of this age group spending time outside of their home hanging out with friends (50%), but also looking after themselves at home (17-19%) or looking after a younger sibling (4-7%).

Providers' views on the availability of childcare

There was a wide variation in providers views of sufficiency related to their location by Learning Community.

In 10 Learning Communities more than 50% of the providers reported that there was enough childcare in their area. In two Learning Communities, Barnstaple and Newton Abbot, 75% or more of childcare providers said there was enough childcare in their area.

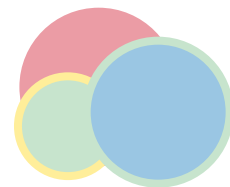
In 10 Learning Communities across Devon more than 50% of childcare providers reported that there was not enough childcare in their area. Of these, three Learning Communities, Braunton, Clyst Vale and Sidmouth, had 75% or more of their childcare providers reporting that there was not enough childcare in their area. Of those that said there was not enough childcare 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. For this question providers could select more than one type of childcare.

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 6pm - after school until parents and carers return home from work. Over 50% said that care between 3.30pm and 6pm should be with childminders.

A high proportion (73%) thought that there needs to be more care from 8am until 9am – to cover the time between parents going to work and school starting.

Over 25% reported that childminders are needed before 8am right through until 6pm. This suggests a general lack in the number of childminders.

Providers' views on the sufficiency of childcare in their area is influenced by a mixture of sources ranging from more formal evidence 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.

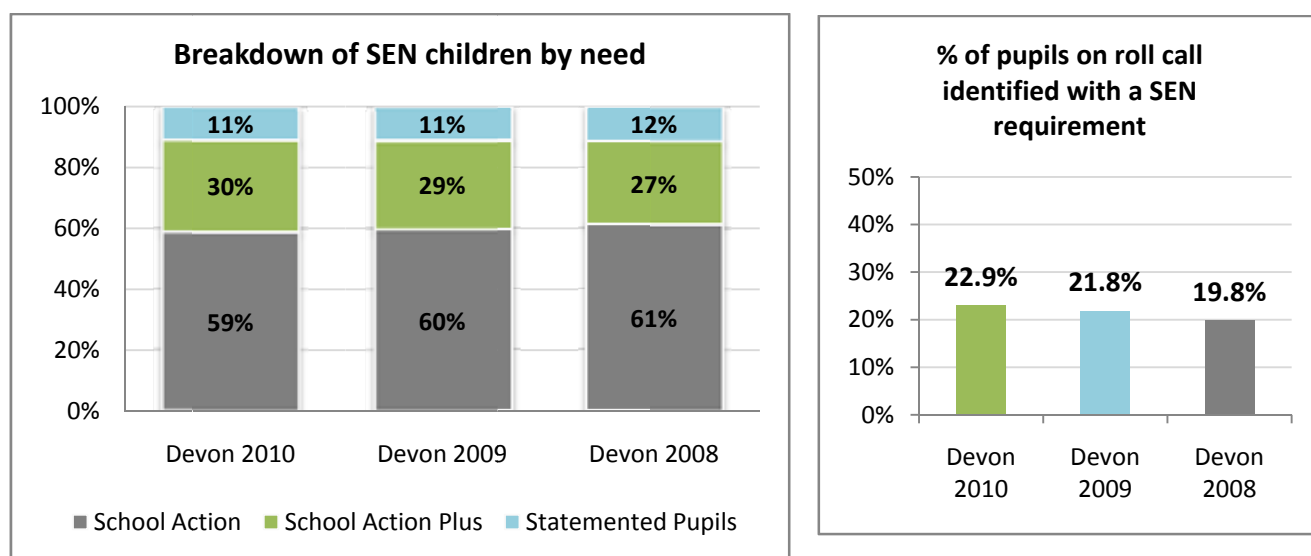


Families in challenging circumstances

Access to childcare for families who have a child with additional needs

Special Educational Needs (SEN) includes children with any condition or disability that requires extra support or help to enable the child or young person to attend or enjoy childcare or similar activities. This can encompass physical disabilities, learning disabilities, challenging behaviour, long-term illness, English as an additional language (EAL) and children who are gifted or talented.

Chart 30: Pupils with special educational needs in Devon



Source: Information Data Services, Devon County Council 2010

Chart 30 shows that although the overall percentage of pupils on roll who are identified as having additional needs is increasing year on year, the breakdown of these pupils into School Action, School Action Plus and having a Statement remains fairly stable with 59% of pupils requiring School Action, 30% requiring School Action Plus and 11% of these pupils having a Statement.

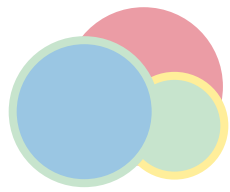
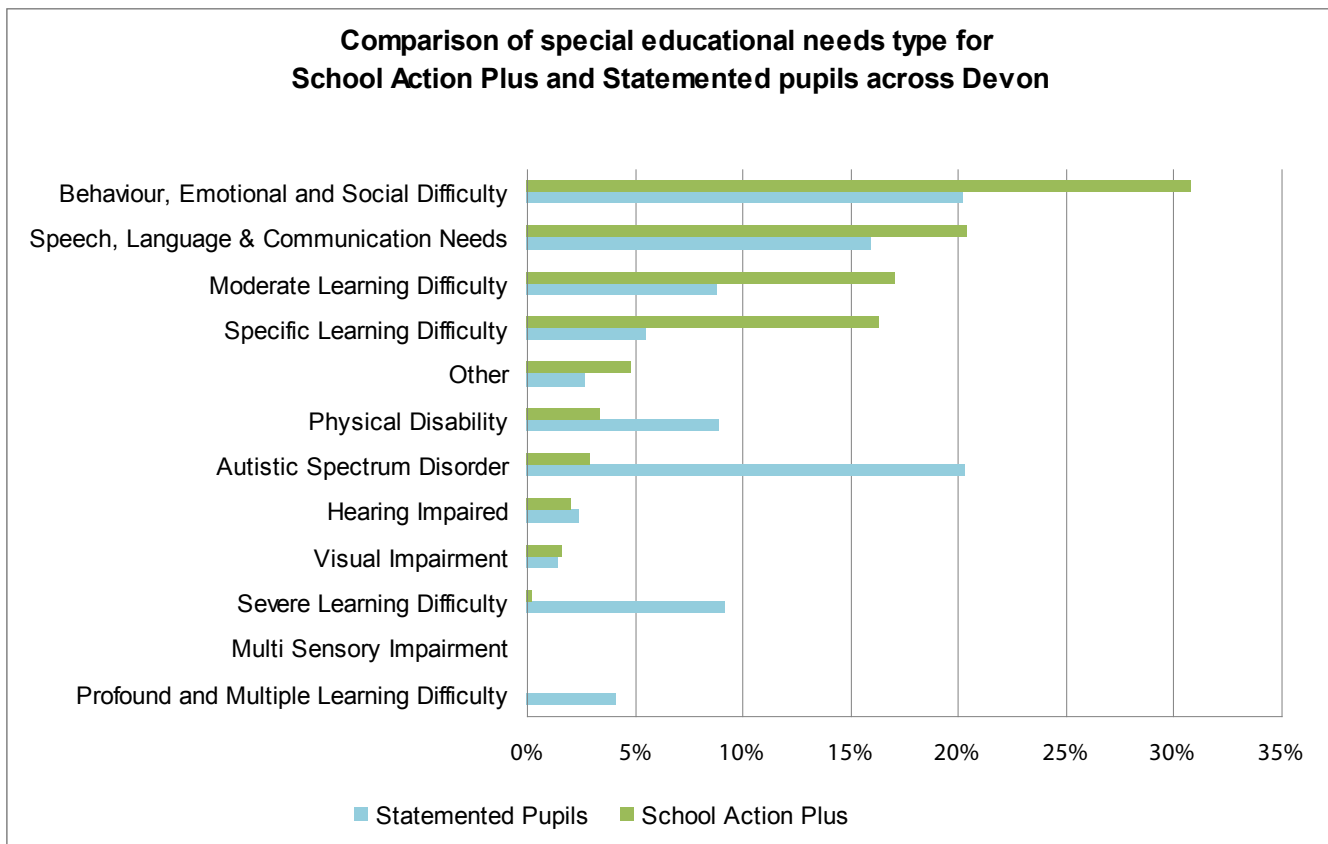


Chart 31: Breakdown of special educational needs by type for School Action Plus and Statemented pupils



Source: Information Data Services, Devon County Council 2010

For School Action Plus, the majority of pupils (84%) have:

- behavioural, emotional and social difficulty (31%)
- speech, language and communication needs (20%)
- moderate (17%) learning difficulties
- specific (16%) learning difficulties.

For Statemented pupils, just over half of the pupils have:

- behavioural, emotional and social difficulty (20%)
- Autistic Spectrum Disorder (20%)
- speech, language and communication needs (16%).

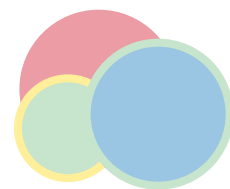
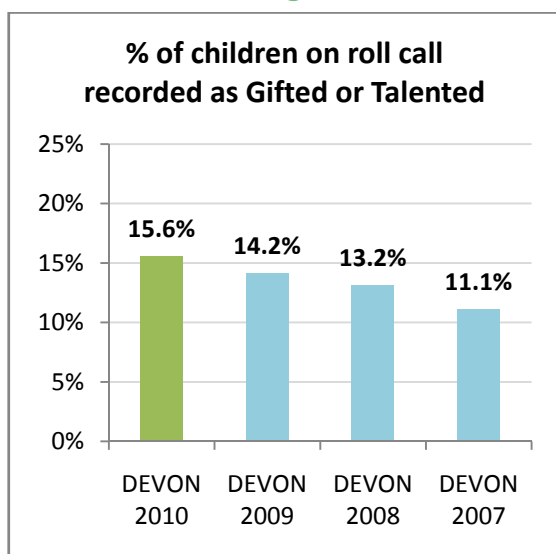


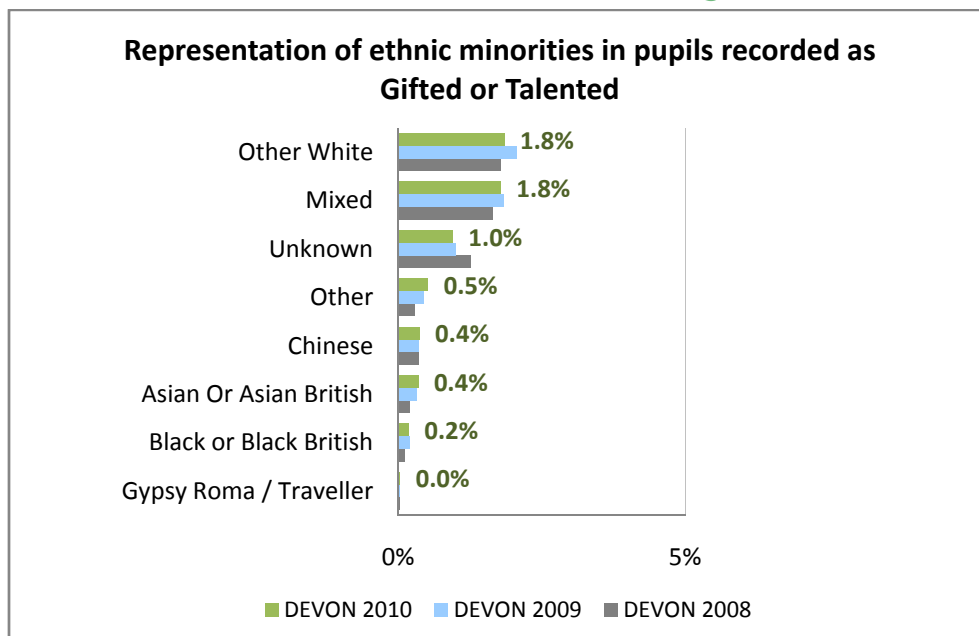
Chart 32: Percentage of children identified as gifted and talented



Source: Information Data Services, Devon County Council 2010

Chart 32 identifies children on roll who are identified as gifted and talented. A proportion of these children may also be identified as requiring special educational needs. The percentage of children who are recorded as gifted and talented has also increased year on year since 2007 rising from 11% of the roll to just over 15%.

Chart 33: Breakdown of children identified as gifted and talented by ethnicity

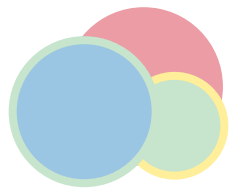


Source: Information Data Services, Devon County Council 2010

The majority of children identified as gifted and talented in Devon are British (94%).

Delivering services

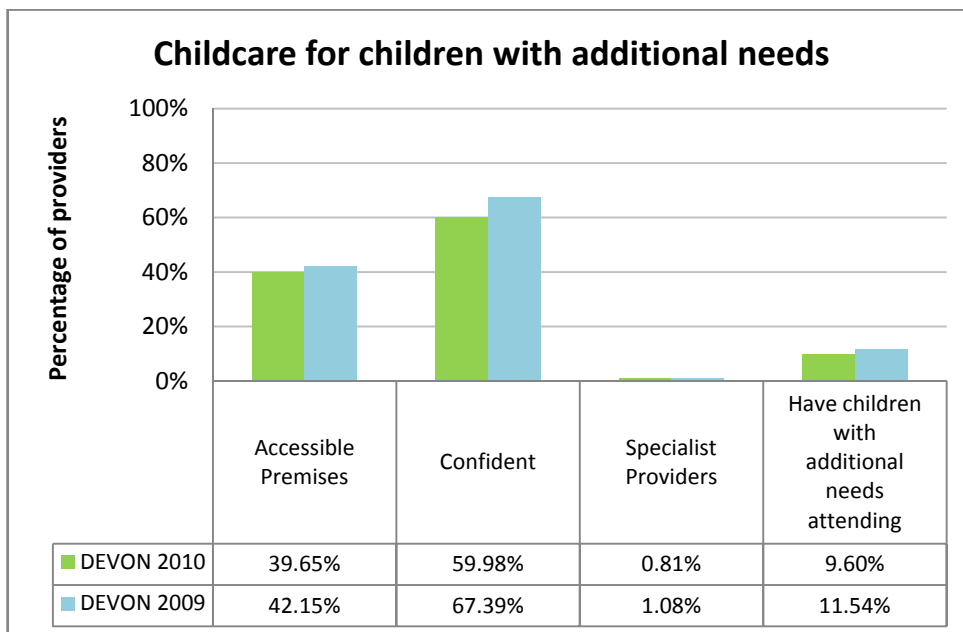
It is important that children with a disability are able, as far as possible, to participate in the same kinds of childcare as their peers. Providers need to offer inclusive childcare to ensure that disabled children are not excluded and are supported so barriers to inclusion are addressed appropriately.



The figures in Chart 34 show the capacity of the childcare workforce to deliver services to children with special educational needs. It also shows where providers have premises that are suitable for children who are disabled. It should be noted that not all providers will necessarily be able to cater for all types of disability; however if demand arises there is a requirement to make adaptations that are reasonably practicable to deliver quality provision and also to meet statutory duties. In practice, many childcare providers can be uncertain about their ability to cope with complex and challenging situations and may be concerned about the suitability of their premises, facilities and staffing levels.

The figure below shows an overall breakdown across all care scheme types highlighting accessible premises, the level of confidence of providers and the percentage of settings taking children with additional needs.

Chart 34: Childcare for children with additional needs



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Across all care scheme types just under 40% of all settings are recorded as having accessible premises, which is similar to last year but has increased since March 2007 (32%). Levels of confidence are higher, with 60% of all providers expressing confidence in caring for children with additional needs. Just under one in ten providers are actually caring for children with additional needs. Further analysis has been carried out to look at these outcomes by the type of provision being offered.

Understandably, the percentage of childminders who have accessible premises is low (13%) and this affects the overall percentage seen above. Over 75% of all voluntary pre-schools, private day nurseries and nursery schools have accessible premises for children under 5 years of age. Levels of accessibility are slightly lower for maintained nurseries and nursery units of independent schools. For primary aged children, 75% of holiday clubs have accessible premises and just under 60% of out of school clubs.

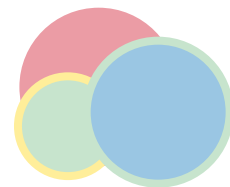
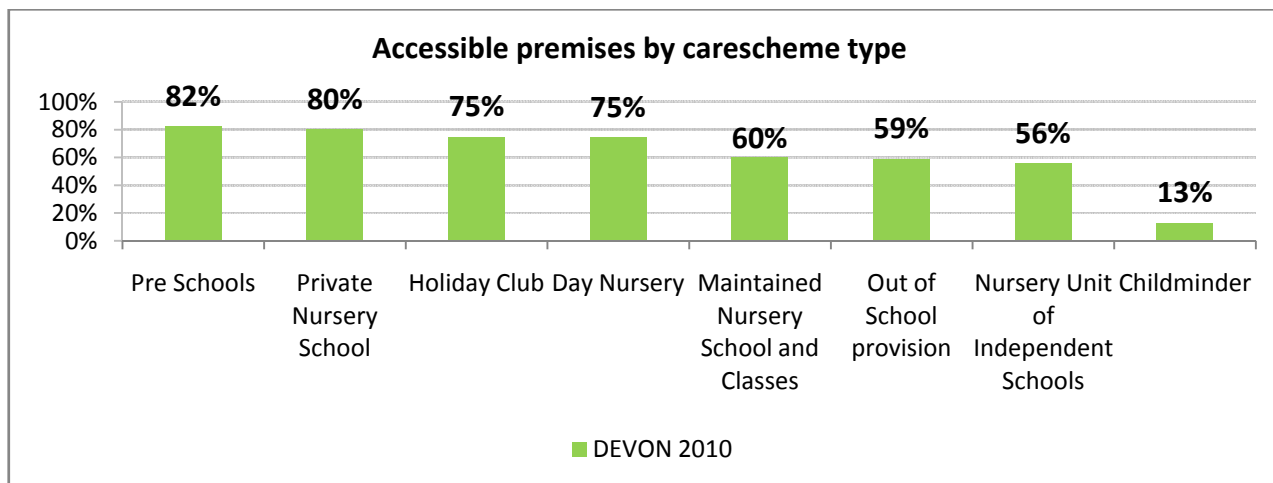


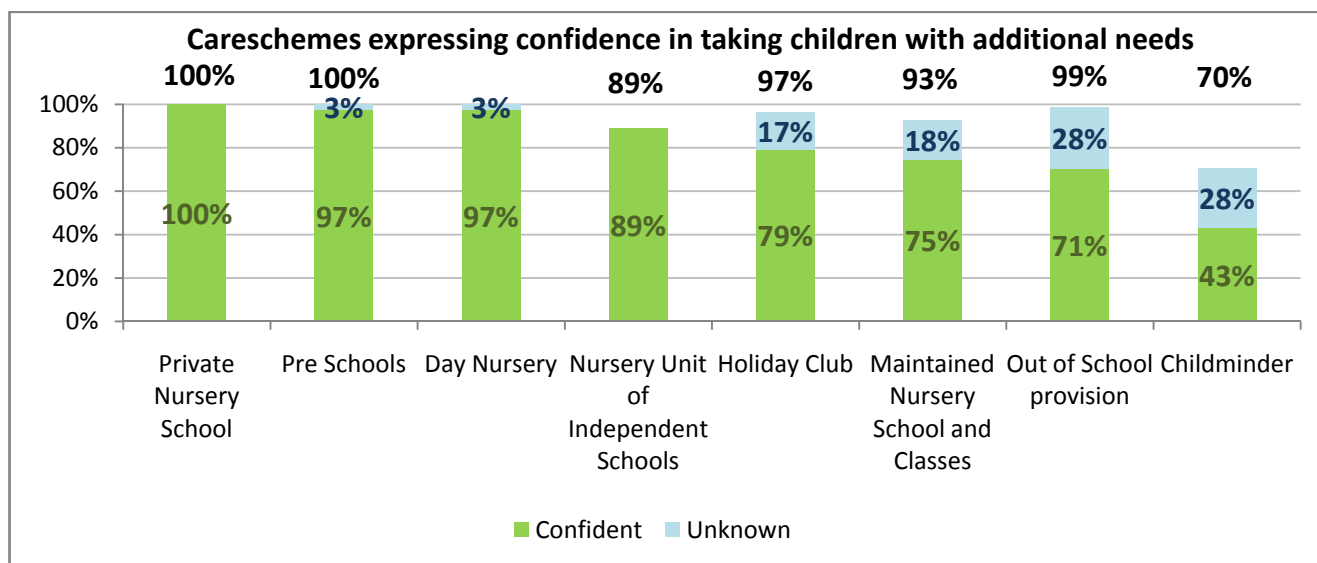
Chart 35: Accessible premises by care scheme type



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

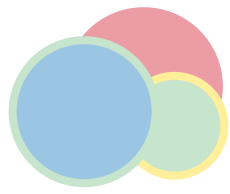
Levels of confidence are lower in home-based childminders which affects the overall percentage. For group-based providers levels of confidence are significantly higher.

Chart 36: Care schemes expressing confidence in caring for children with additional needs



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Childcare providers caring for children under the age of five were asked about inclusion during a support visit to find out in more detail how the settings were providing for children with special educational needs and disabilities. There were questions on the range of resources and equipment, how the setting establishes the needs of individual children, whether specific needs were reflected in their risk assessments and what accessibility options the setting offers. Examples of the type of accessibility options included those for a wheelchair user or impaired mobility, changing facilities, behaviour strategies, support to children with English as an additional language and hearing or visual impairments.



Settings were asked about the inclusion training completed by staff and also what barriers there were to inclusion in their setting.

The majority of settings were considered to have a wide range of resources and equipment. Examples of the comments from the settings recorded as having a wide range include:

- “a wide range for all ages and abilities, e.g. large building blocks, Duplo and Lego for construction”
- “sensory plants in outside play areas, sensory blocks, pictures and Makaton signs”
- “visual timetable used, sensory resources, treasure baskets, wide range of resources suitable for the different ages and abilities of children”.

Settings with poorer facilities were often limited by the environment of their building, for example no outdoor or limited outdoor play space; while others needed to upgrade or replace some of their equipment.

Over 75% of the settings had staff who had attended Inclusion training. The type of training was also questioned, while some gave general answers, many settings were more specific. The range included the Level 3 SENCO training, The code of practice and writing an Inclusion policy, the three day Portage training, ICAN and SEAD to more specific courses on the autistic spectrum and ADHD and courses such as Supporting staff supporting children. Some settings had completed a high number of training courses related to inclusion.

For settings that appeared not to have attended training, it was mainly that their training needed reviewing or updating and either they were advised to do so or had already planned or booked; for some they had just appointed a new SENCO and training was planned. A very small number of settings do not appear to have attended any inclusion training.

The majority of settings said they did reflect on the specific needs of children when completing their risk assessments. Over three quarters of the settings confirmed that their setting was accessible to wheelchair users. However, for those that did not have wheelchair access, many had steps and stairs or narrow doorways while others did not have disabled access to toilet facilities or their premises had limited space or small rooms.

The outside play area was not accessible to wheelchair users in some settings again mainly due to steps.. Approximately half of the settings noted that they provided support to children with hearing or visual impairments, behavioural problems and English as an Additional Language. The remainder do not necessarily fail to provide this support but it had not been recorded during the visit.

Some barriers to inclusion have already been discussed and approximately a third of settings visited said they do have a barrier to inclusion. For the vast majority this was related to physical access to the building, but for a smaller number the barrier was related to staff training and development, particularly ensuring this was up to date.

The proportion of settings with recorded barriers to inclusion varied by district with Mid Devon and Teignbridge having the highest proportions. There was no difference between whether the setting was in the private or voluntary sector.

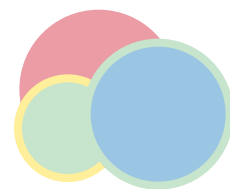


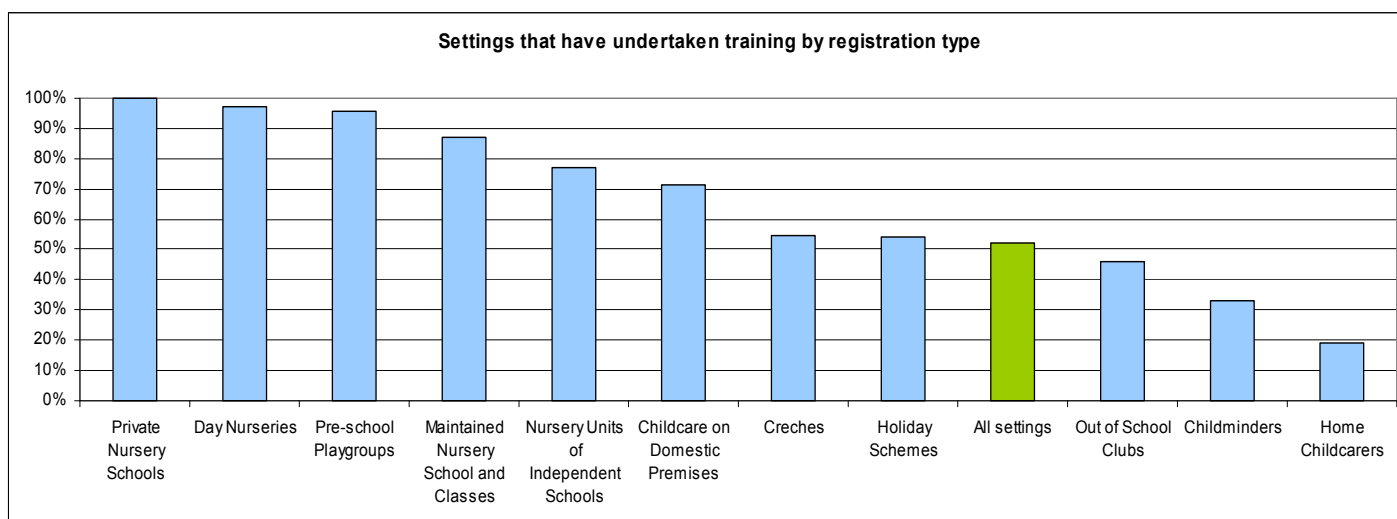
Table 20: Barriers to inclusion

Barriers to inclusion				
District	No	Yes	Total	% Yes
East Devon	34	17	51	33.33%
Exeter	17	4	21	19.05%
Mid Devon	17	18	35	51.43%
North Devon	41	10	51	19.61%
South Hams	18	8	26	30.77%
Teignbridge	20	16	36	44.44%
Torridge	16	3	19	15.79%
West Devon	8	5	13	38.46%
Devon Total	171	81	252	32.14%

Source: Early Years and Childcare Service, Devon County Council 2010

In addition to the comments provided directly by childcare providers, an analysis of training completed by staff working in childcare settings in caring for disabled children was undertaken. This report identifies that 95% of staff in private nursery schools, day nurseries, pre-schools and maintained nurseries have attended Inclusion training and 84% have kept this updated in the last two years.

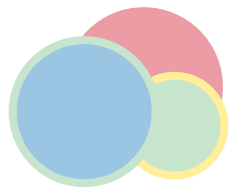
Chart 37: Percentage of settings that have undertaken training by registration type



Source: Early Years and Childcare Service, Devon County Council 2010

Attendance across the county varies and needs further investigation as this could be due to the lack of need in the area, or lack of training available to settings in specific areas.

This report also identifies that childminders, home childcarers and out of school settings do not access training on a regular basis, as only 34% have attended inclusion training and only 23% have kept this updated in the last two years.



Summarising the different types of inclusion training available demonstrates that the most highly attended course is SEN. This could be because this is a general awareness course giving an overview of the topic as a whole.

Following on from this the majority of practitioners have selected Equality and Diversity, Communication and Behaviour and Bullying due to the requirements of setting to attend courses that give an overview of the topic as a whole. The remainder of the topics are more specific to specialist areas and so attendance is lower as practitioners may only attend the courses if they have need in their setting.

Specialist childcare provision

In Devon there are a number of specialist childcare schemes and respite services for children with additional needs. The majority of settings provide holiday care, but some also provide care on Saturdays and term-time care for school aged children. The age group catered for varies, but settings often take children and young people from 4-19 years. Children and young people may have to travel long distances if there is no provision available locally.

Across Devon, there is at least one group-based specialist provider for children with additional needs in each district. Most of the groups run some provision during the school holidays, and on Saturdays. For some children with additional needs accessing their closest provider would involve travelling a significant distance.

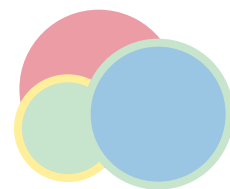
Table 21: Providers offering specialist childcare in Devon

District	Saturday Club	Before and After School provision	Holiday Club	Evenings
East Devon	2	0	2	0
Exeter	4	2	3	0
Mid Devon	0	0	3	2
North Devon	0	1	3	0
South Hams	0	0	1	0
Teignbridge	1	0	1	0
Torridge	0	0	1	0
West Devon	1	0	1	1
Devon Total	8	3	15	3

Source: *Early Years and Childcare Service, Devon County Council 2010*

East Devon

- The East Devon Activity Scheme in Exmouth is an inclusive scheme for children aged 4-16 years which runs on Saturdays and during every school holidays running from two sites.
- The East Devon Activity Scheme in Honiton caters for children aged 4-16 years and runs on some Saturdays and during the school holidays. This scheme was judged outstanding by Ofsted.



Exeter

- CEDA provides after school care, a Saturday club and holiday care which caters for children aged 8-18 years.
- The Hollow Lane Club at Ellen Tinkham School provides some after school care and Saturday care with additional sessions during the school holidays for 4-19 year olds.
- Headway Devon runs sessions on Saturdays for children aged 5-16 years.
- The Joint Agency Service runs a holiday club in Countess Wear in the holidays and a Saturday Club for children from 6 years.

Mid Devon

- The Out of School Clubs Project in Crediton operates early evening one day a week and organises activities during the school holidays for 13-18 year olds.
- Mid Devon Alliance for Special Children (MASC) in Tiverton currently offers care for children over 8 years in the school holidays. It also runs a Youth Club for over 13 year olds on Friday nights and is looking to run on Saturdays.
- CEDA is another holiday provider for children aged 4-25 years who have specific needs in Tiverton.

North Devon

- Pathfields School offers care for children aged from 8 years and runs during the school holidays.
- The Reflections Club in North Devon offers all year round care for severely disabled children aged from 8 years. The provision offers childcare with a holistic approach to learning using horses and other animals as therapy for children with disabilities and emotional and social behaviour challenges.
- Lampard School offers care for children attending their school and runs during the school holidays.

South Hams

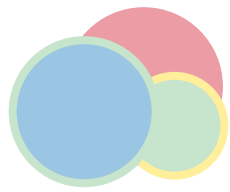
- Bidwell Brook Holiday Club in Dartington cares for children aged 3-16 years and runs during some of the school holidays.

Teignbridge

- Orchard Saturday Club in Newton Abbot runs on Saturdays.
- Special Play and Learning Activities in the School Holidays (SPLASH) in Newton Abbot is a holiday playscheme and takes children from 4-16 years. It is open three days a week in every school holiday.

Torrige

- Torrige Special Friends in Bideford runs twice weekly during the summer holiday and takes children from 7-15 years. Torrige Special Friends also ran a group in Holsworthy which closed in the last year.



West Devon

- The Hollow Lane Club is a holiday scheme in Okehampton which takes children aged 3-19 years. It is open on two Saturdays every month and on occasional days in the school holidays. The closest provision for Tavistock would be in Plymouth. However, Tavistock Youth Café provides care for children 6-19 years one evening each week.

Parents' and carers' views

One of the parent groups not given enough consideration in the 2008 Childcare Sufficiency Assessment were the parents of disabled children. In this Assessment a special focus was given to capturing the views of parents of disabled children to better understand their childcare needs and any barriers they might have to using childcare.

A total number of 343 parents were asked about their needs.

- 242 parents as part of the Hemsall's Survey.
- 86 parents of children and young people attending Devon special schools.
- 15 parents of pre-school children gathered in collaboration with the Portage Service.

In the parent and carer questionnaire survey conducted by Hemsalls and Morgan's research, approximately 242 parents, (12% of all respondents) were caring for a disabled child or a child with additional needs. A total of 277 disabled children and children with additional needs (8% of total) were being cared for by these respondents.

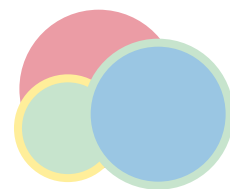
Parents and carers of disabled children and children with additional needs identified very similar patterns of childcare use to those used by all parents and carers in terms of a formal and informal mix. However for older disabled children there was a higher use of informal care.

Having a child cared for by someone the parent and child know was identified as important for parents and carers of disabled children. A relatively high proportion of parents and carers of a disabled child use childcare for respite (17%).

A smaller proportion of parents and carers of a disabled child or child with additional needs were satisfied with their current childcare arrangements (85% were satisfied compared to 95% overall). They were also more likely to rate the quality of childcare generally as poor - 23% rated the quality of childcare locally as quite poor or very poor compared to 12% overall.

They were more likely to report too few childcare places in their local area than all parents and carers - 49% of respondents caring for a disabled child or child with additional needs stated there were not enough childcare places in their local area. Adjusting for respondents who were unsure or who declined to answer the question, this increased to 61%.

A lower proportion of parents and carers of a disabled child or child with additional needs were satisfied with their current childcare arrangements - 62% were very satisfied and 23% quite satisfied compared to 74% and 21% respectively for all respondents. A higher proportion indicated their current childcare arrangements were not meeting their needs (20% compared to 10% overall).



From the 242 parents caring for a disabled child in the survey, a total of 41 parents went on to make further comments about childcare for their disabled child. The majority of the comments were related to inclusion of their child into a setting. Other issues mentioned were costs, availability and flexibility.

Several parents mentioned a specific disability and the particular needs of their child; for example a child with sensory disabilities needing a quieter sensory environment rather than crowded facilities.

A number of parents spoke of the difficulty of finding childcare for older disabled children, particularly those with behavioural and emotional problems. One parent felt that there were problems with children not coping socially as they do not understand the rules, or when people changed them. Also mentioned was the desire for special needs schemes meeting the needs of the older child.

- “My child has spina bifida. Childcare provisions, while fine for younger children, are lacking for secondary school age. The local area would benefit from offering more provisions for children with physical disabilities.”
- “My disabled 12 year old son is bored by the special needs holiday play scheme, which is not suitable for his abilities.”

Parents talked about the need for a greater understanding by staff and carers in caring for children with specific needs and the need for specialised training - Aspergers and diabetes were both mentioned here. Parents felt that there was also a general lack of understanding of disabled children and their problems with social interaction with other children in the setting. A need for differentiation between the needs of children with behavioural problems and those with learning disabilities was mentioned.

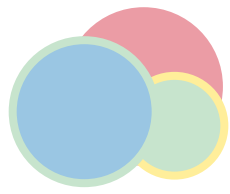
The lack of provision for disabled children in rural areas was noted by parents, specifically mentioned was the lack of care for an autistic child and for a child with Downs Syndrome.

- “My eldest child has Aspergers, and finding suitable childcare for him became such a nightmare that I had to give up work. I rely on family to help me out at the moment. I really would like to go back to work, but finding available childcare is a struggle. It is not too bad for my youngest children, but for older children it becomes a big problem. I would very much welcome a special provision for children with behavioural or emotional problems in my area.”
- “The after school clubs are particularly tricky for my daughters with Downs, availability is an issue but I think that is mostly because we are in a geographically remote area.”

Several parents mention they would like more childminding care for their disabled child. The smaller group size and home environment was thought to be more suitable for a child who is autistic or has Aspergers.

- “My son is disabled so there are very limited things which he can do. I would really like a childminder who looks after older children and maybe even mixed groups, children with disabilities and without. Even if there was one day a month which was £40, would be happy to pay because at least it's something.”

The lack of provision and help for children with mild disabilities was mentioned as a problem, for example for children with ADHD.



There was some concern about children being excluded and the protection and safety needed for their child in the setting how the wrong type of provision impacts on children's welfare and self-esteem. As one parent said: "the key is inclusion and the provision of inclusive care". One parent said she would like the opportunity for her child to drop in on local facilities with children he knows and staff who understand his problems.

The cost of childcare was seen by some parents as the main barrier to them using formal childcare. There was concern that the funding could be cut next year. One parent contacted Quids for Kids for help, but so far no one has contacted them.

- "Our main concern is with our youngest child, who is severely visually impaired. We currently receive funding for her childcare. However, we have recently been informed that the funding will be cut next year. We are a bit unsure of what we are going to do then. I suffered quite badly from post-natal depression after her birth, and really need that extra time off to recharge my batteries and be ready to look after her properly when she is at home. The cost is probably going to be difficult for us to cover by ourselves, and we are concerned about finding someone we trust when searching for more affordable childcare. It is a little unfair entitlement anyway. It is just that interim time period that is going to be the real problem."

Several parents mentioned the need for respite care, not only for the family, parents and siblings but also for the child.

- "My eldest two sons are autistic. One is very severely autistic, and the other is high-functioning autistic. We currently receive free weekend respite and all my children attend regular meetings with other autistic children and young carers. We really need the respite, as much for my younger children as myself."

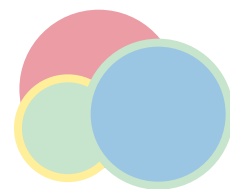
For some parents the lack of information was an issue, what is available and how you access provision or find out about special support. A pack similar to one Plymouth have developed was suggested.

Finally two parents spoke about their positive experience of childcare for their disabled child which demonstrates that when it works well what a difference it can make.

- "The childcare offered by the school is fantastic, and they work very well with my six year old, who has cerebral palsy. We use an after school club, and a holiday club. The eldest is old enough now really to look after himself."
- "My eldest has Downs Syndrome. The funding available for his disability gives him two hours a week free care which is just about sufficient for me. The support I have received is excellent, and at present I don't really feel like I need any more."

For parents with pre-school children with a disability, there is a preference to use informal childcare. Reasons for those using formal childcare included socialisation of the children, regular work, family commitments and respite.

- "Initially so I could return to work, now I can't due to child's disability. I still send him to nursery for social benefits and new experiences"



Reasons for not using formal childcare relate to family arrangements, familiarity, cost, a lack of personalised provision and confidence in current provision.

- “My mum knows her best and she wouldn’t get one to one in a day nursery as it only starts at three. Also it’s really expensive.”

The responses to the consultation with parents of children and young people attending special schools came from parents living across Devon, with higher numbers in Exeter and Barnstaple. The highest response rate was from parents with children in the 11-14 age group.

Parents were asked about activities their children currently attend and the reasons why these activities were chosen. More than 60% of parents said it was because their children enjoyed the activity or it gave them the opportunity to socialise. One in three parents gave the reason as giving the parents a break, but only a small percentage, just over 10% selected the reason ‘so parents could work or train’.

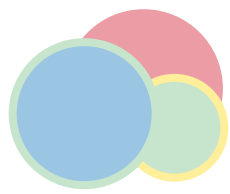
Two other common reasons were to spend more time with siblings or to encourage a physical activity. The location of the activity changed as children and young people grew older, with younger children more likely to attend an activity at school and older young people, an activity near home.

For parents who would like their child to attend another activity currently not being accessed, the proportion of reasons mirrored those for activities already being attended. Predominantly for children to attend an activity they enjoyed or to give them the opportunity to socialise with other children. A wide range of types of activities were recorded reflecting the diverse interests of the children.

A key finding for the desired location of the additional activities was the move away from activities based at school to other locations, not necessarily near to home, but depending on where the selected activity was available.

Parents were asked about any barriers to accessing the additional selected activity that their child would like to attend. The two principal reasons were related to staffing and facilities. Parents were concerned about staff not being confident to care for their child and that the activity lacked suitable facilities. These two imply that parents need to feel sure that the activity can provide staff who can confidently care for their children with sufficient resources available. Cost is cited as a significant barrier to access, along with transport arrangements. For some parents, there seems to be a lack of available information, parents do not know what is available and whether there are places for their child.

The childcare views and experiences of parents with pre-school children with a disability were gathered in collaboration with Portage, a home-based education service offering an early intervention scheme to parents of children under five with complex learning or physical difficulties or both. Working closely with educational psychologists and advisory teachers to produce individual programs, Portage home visitors focus on developing skills in; sensory, creative, physical, personal, social, emotional, independence, cognition, play, communication, language and literacy. They also run music therapy, social occasions for whole families to access and step-by-step groups (both of which enable parents and children to meet other families), as well as offering guidance and training to early years setting staff in supporting children with additional needs in the Foundation Stage.



Fifteen individual parents participated in this consultation through a focus group and questionnaires.

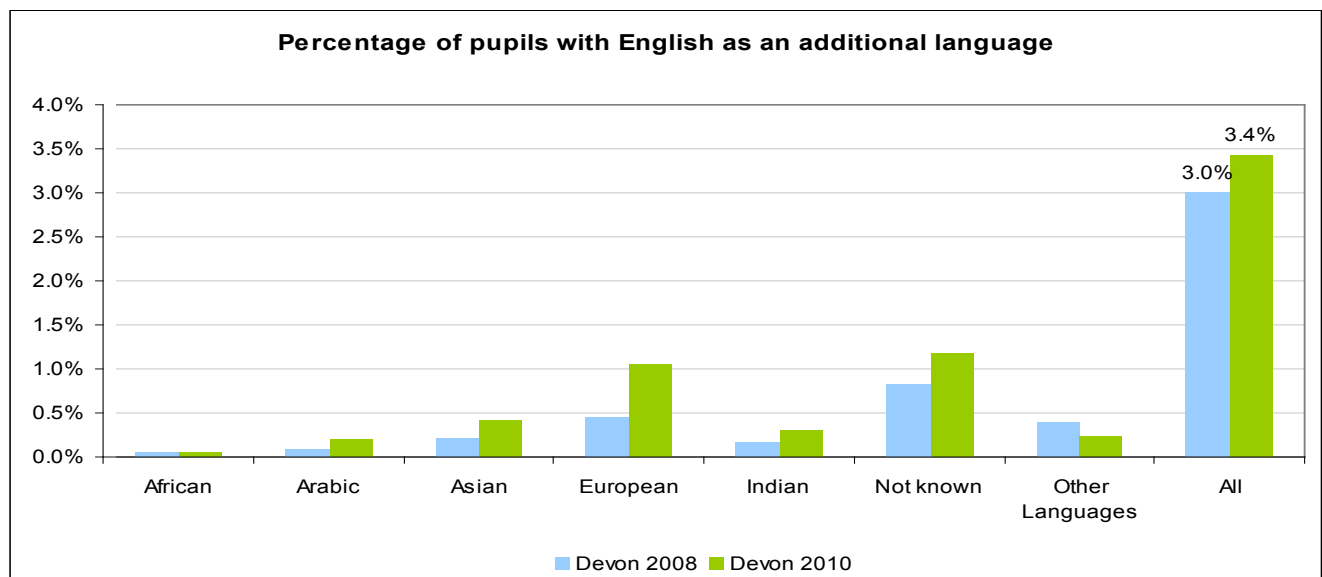
The reasons given for using formal childcare emphasised socialisation of the children, regular work and family commitments and respite. Reasons provided for not using formal childcare, or preferring informal childcare, included family arrangements, familiarity, cost and a lack of personalised provision or lack of confidence in current formal provision.

This consultation suggests a lack of familiarity, skilled staff, specialist provision, cost and confidence in formal childcare (possibly based on a lack of information or awareness) are key barriers to accessing childcare for parents of children with a disability.

Families in black and ethnic minority communities

In 2007 there were 750,100 people living in Devon. Of these 702,000 (93.6%) were classed as White British. A further 22,700 (3%) people were from other white ethnic groups. Overall 3.49% of the population in Devon were from minority ethnic groups, compared to 11.8% in England.

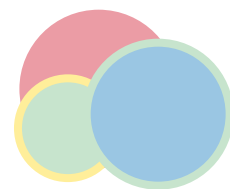
Chart 38: Pupils with English as an additional language



Source: Information Data Service Devon County Council 2010

There has been an overall increase of 0.4% of school age children with English as an additional language since autumn 2008. All language groups except African have seen a rise. The highest proportion of school age children with English as an additional language remains of European origin (0.9%). Within the European region, over a third of the children (37%) have Polish as their first language, followed by German (9%), Spanish (8%) and French (7%).

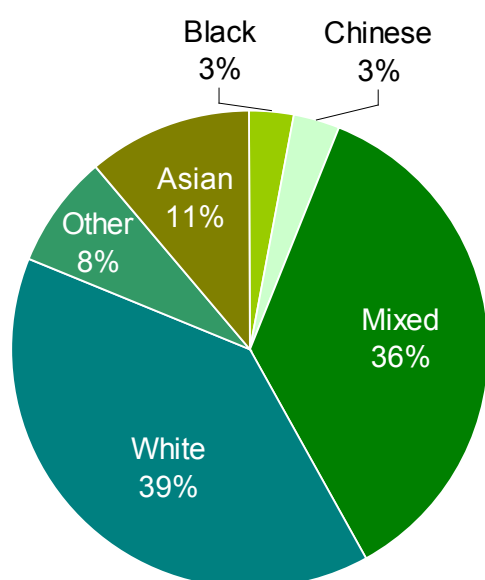
Overall, of those children with English as an additional language the greatest number of children with another first language is Polish (9.7%) then Arabic (4%) and then Filipino (3.4%) and Chinese (3.4%). This compares with autumn 2008 when the greatest number of children with another first language was Polish (9.6%), then Chinese (4%) and then Bengali (2.8%) and Filipino (2.6%).



The German and Spanish speaking children are spread across Devon. Polish is also spread but the largest Polish communities are to be found in Exeter, East and Mid Devon. Arabic and Malayalam speaking children are concentrated largely in Exeter, with Bengali spoken mainly in Exeter, North Devon and Teignbridge and Tagalog or Filipino in Exeter and East Devon.

As part of the Early Years Census in 2009, all private, voluntary and independent (PVI) providers were asked to record how a parent described their ethnic origin. There were 7326 funded children attending PVI providers during Census week in 2009. The collection of ethnic information was optional, but on entering school the majority of parents (92.2%) had provided this information. Of the 6754 children where ethnic data was recorded, 6371 were declared to be White British. This was 94.3% of the total number of children with ethnic codes. The ethnic origin of the remaining 383 non-White British children is shown in Chart 39.

Chart 39: Non-white British ethnicity



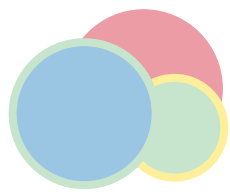
Source: Early Years and Childcare Service, Devon County Council 2009

Chart 39 shows that Mixed (in particular White/Black and White/Asian) is the most popular ethnic category after White British. White (including White Eastern European, White Western European and White Other) is also popular.

The childcare views of 16 parents who have English as an additional language were gathered in collaboration with the Devon Refugee Support group and the Anglo-Polish organisation. This choice reflects two of the most popular first languages – Arabic and Polish.

A high proportion (71%) of parents from the Devon Refugee Support Group were using childcare, including childminders, nurseries and playgroups. Many of the women needed to use childcare in order to be able to attend college to learn English. The only reason given for not using childcare was that it was too expensive. The parents do not have extended families to help them out with childcare due to being refugees. The provision of clear information on the types of childcare, funding available and the processes involved were also issues.

The two Polish parents interviewed both spoke English and neither felt that language or cultural difference affected their need or use of childcare.



Additional views of Polish parents' childcare experiences in Devon were given by the Joint Director of the Anglo-Polish organisation. Language, trust and safety were all considered to be barriers for parents. The ability of the childcare provider and the child to communicate was of critical importance. Also parents were concerned about the prevalence of discrimination.

Cost was also considered a factor, with many migrant workers in low-paid jobs. Provision of culturally appropriate resources and employment of people from within their communities would encourage parents to use childcare. Clarification of rules of using informal childcare was also needed.

Some research was completed in the take up of the early years entitlement to look at the take up of minority ethnic groups. This was done by looking at how many children now in school had not previously attended an early years provider and taken up their free entitlement.

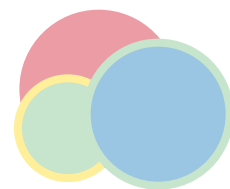
Table 22 shows the number of children that were in reception classes in school in 2009/10 where there was no record of early years attendance in any term prior to the child starting school. Also listed is the number of children attending PVI settings during the Early Years Census in 2009.

The table shows that for every single minority ethnic group, there was a higher proportion of non attendance at early years settings than actual attendance. In some cases the difference in non attendance and attendance was substantial; Asian children made up 2.7% of the total non attendance but only 0.6% of attendance, Black (1.6% and 0.1%), White Other (6.0% and 2.0%) and Other (2.2% and 0.4%). The table strongly suggests that children from a minority ethnic background are less likely to access their early years entitlement than children who are classified as White British.

Table 22: Non-Attendance by Ethnicity 2009/10

Ethnicity	Number of Children with no EY Attendance	% of Total Non Attendees	Number of PVI children – EY Census 2009	% of Total PVI Attendees
Asian	5	2.70%	43	0.60%
Black	3	1.60%	10	0.10%
Chinese	1	0.50%	12	0.20%
Mixed	6	3.30%	139	1.90%
White British	147	79.90%	6371	87.00%
White Other	11	6.00%	148	2.00%
Other	4	2.20%	31	0.40%
Not Obtained or Refused	3	1.60%	194	2.60%
Left Blank	4	2.20%	378	5.20%
Devon Total	184	100.00%	7326	100.00%

Source: Early Years and Childcare Service, Devon County Council 2010



Parents aged under 25 years

The population of young parents aged under 25 taken from the number of child benefit claimants, an indicative figure, shows that Devon at 4.8% has a lower proportion than the national figure for England and Wales (6.1%).

Table 23: Child benefit claimants

Area	Total main claimants in receipt of Child Benefit	Number of main claimants in receipt of Child Benefit aged under 25	% of main claimants who are under 25 in the defined area
England and Wales	6,864,935	421,150	6.1%
Devon	82,995	4,005	4.8%
East Devon	13,625	500	3.7%
Exeter	12,455	875	7.0%
Mid Devon	9,280	470	5.1%
North Devon	10,995	610	5.5%
South Hams	9,425	285	3.0%
Teignbridge	14,300	645	4.5%
Torridge	7,100	380	5.4%
West Devon	5,815	235	4.0%

Source: HMRC Statistics, 2009

Exeter (7.1%) has the highest figure, above the national rate and Mid Devon, North Devon and Torridge have the next highest population figures for young parents.

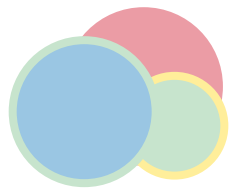
Fifty-one young parents took part in a survey on their childcare needs. Responses were gathered in collaboration with children's centres.

Just under a third of the parents were not currently using childcare. For those using childcare there was a slight preference towards informal childcare (47%) rather than formal (41%).

The choice to not use formal childcare was related to personal preference, not in work or education, the child's age, lack of availability, cost, flexibility and an unfriendly environment. Positive feedback was given from those who had used formal childcare.

Local availability, flexibility and location may be key barriers. Parents reported that needing to pay up front reduced flexibility, distance to childcare and less transport links reduced the choices for young parents. Some young parents would like to see the free entitlement extended into the school holidays.

Care to Learn (C2L) is important in supporting young parents under 20 years in continuing with their studies by paying for Ofsted registered childcare. Devon's take up of Care to Learn (9.64%) is very low compared to the national average in England (16.18%). In 2008/09 we were 123rd out of 148 local authorities. The take up is particularly low in 18-20 age group (4.37%) as compared to (32%) of under 18s.



Parents from Gypsy, Roma and Traveller Communities (GRT)

A number of different traveling communities can be found across Devon. While they all share a history of traveling lifestyle, each has its own ethnic identity traditions, lifestyles and their mobility can vary.

Many families from GRT communities choose to home-educate their children to provide continuity and keep education in line with their beliefs and lifestyle. The GRT children face many potential barriers, including little or disrupted access to schooling through mobility and marginalised states.

In terms of child population, Table 24 shows the total number of children from Gypsy, Roma and Traveller Communities known to be in the Devon area in 2007/08, according to the Devon Traveller Achievement Team, although these figures are likely to be lower than reality.

Table 24: GRT children in Devon by age

	Age range					Total number of GRT children
	0-2	3-5	6-11	12-16	17-19	
No of GRT children in Devon in 2007/08	69	81	192	91	5	438

The highest numbers of GRT children attending school in 2009/10 were in South Hams (73), Mid Devon (58), Teignbridge (46) and East Devon (41).

The childcare views of parents from GRT communities were gathered in collaboration with the Traveller Achievement Team. Eight parents gave their views through interviews and questionnaires.

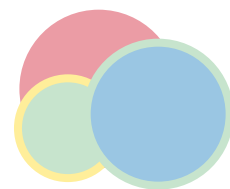
Five of the eight parents had used nursery or pre-school childcare provision and those who had used childcare were generally positive.

Trust was seen as the key factor in choosing childcare for these parents and the threat of racism was given by one parent as a reason for lack of trust. Cost was also a barrier and an understanding of the rules of caring for other people's children. Lack of information on what is available was also mentioned.

The responses suggest a growing number of GRT families having positive experiences of childcare and a commitment to their children's access and opportunities.

In spring 2010, the take up of the early years free entitlement was nearly half of the eligible children, 12 out of 25 children had attended settings. Those figures only include those who are registered with a date of birth and an address.

One of the parents suggested that the free entitlement should be made easier and more flexible. One possible option could be dual registration, as in the case with schools.



Parents with mental health conditions

It has been acknowledged through research that mental health problems can have a negative effect on people finding and keeping jobs. This can lead to isolation, social exclusion and poverty.

Figures are not available on the numbers of parents with mental health conditions but they could be between 3,000 and 6,000 based on estimates.¹²

Childcare views and experiences of parents with mental health conditions were gathered in collaboration with Be Involved Devon. Five parents gave their views and experiences through one to one interviews. All of the parents were using a mix of informal and formal childcare.

A preference for use of informal childcare was clear for some parents, but the use of formal childcare was described as convenient, and an opportunity for respite as well as socialisation and development for their children.

- “Before she was three, I was much more happy to use the informal childcare... If my husband and I needed some time or if I was back in hospital, we used them a lot. It was really good to have that at the time.”

Armed Forces families

A number of parents from service families spoke about their need for childcare and how this is affected by having a partner in the forces.

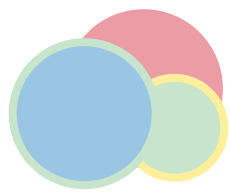
Holiday care was mentioned as a specific need as: “a lot of things on camp close in the holidays”. This was particularly difficult with partners’ away and no close family living near by.

One working parent spoke of a grandparent coming to stay to look after the children, or friends being used or they had time off work to care for the children.

Parents also spoke about wanting to go out to work, but that they received no encouragement to do so. They explained how difficult it was for women to take up work with partners in the forces who may do shift work and are away for long periods. Help was needed for mothers wanting to go back to work.

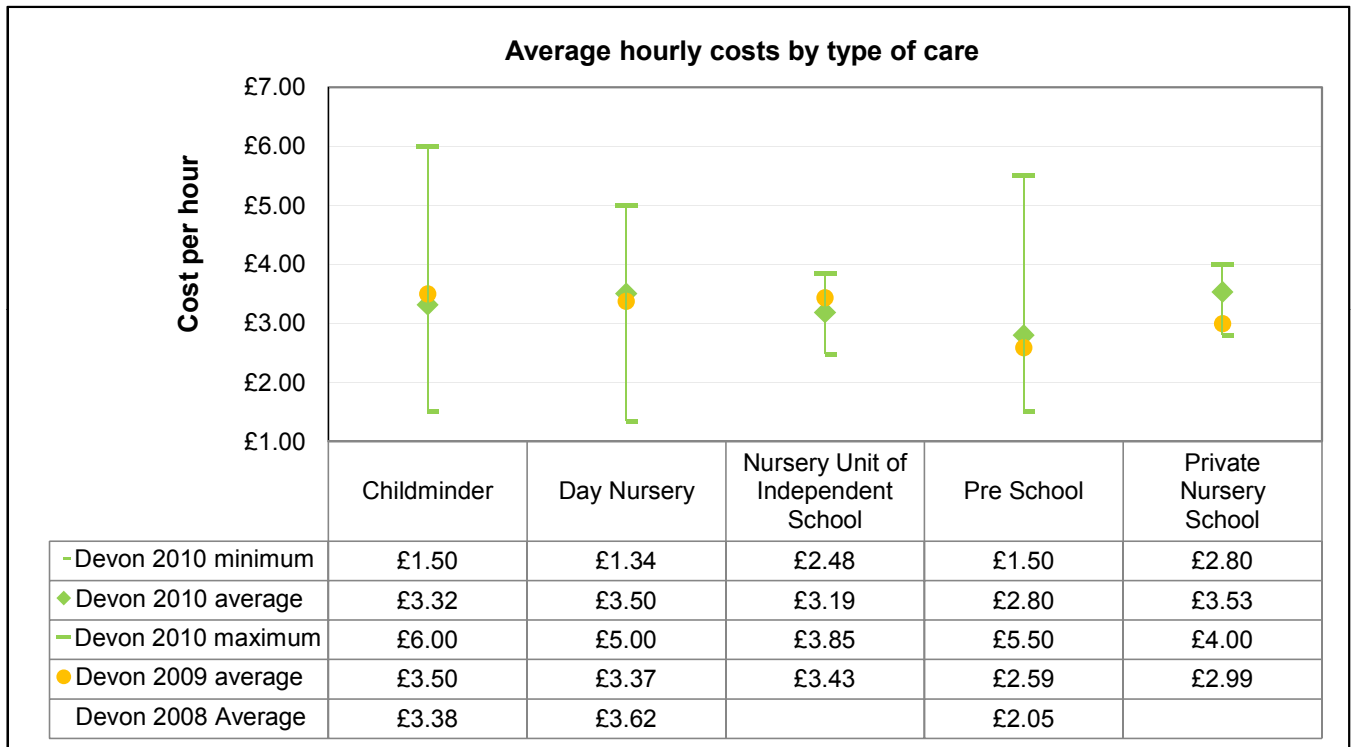
Cost was also an issue for some parents who felt childcare was too expensive.

¹² S.Blake. A targeted consultation with families who may not usually have their voice heard or have additional needs 2010.



Paying for childcare

Chart 40: Average hourly costs of childcare by care scheme type



Source: Early Years and Childcare Service Annual Childcare Audit 2010

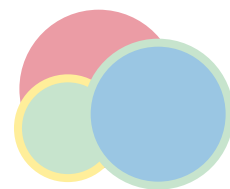
Table 25: Percentage of all providers contributing to costs analysis

Care scheme type	Childminders	Day nurseries	Nursery units of independent schools	Pre-schools	Private nursery schools
All providers	783	109	17	266	10
Providers contributing costs data	637	44	10	220	8
% of providers	81.3%	40.4%	58.8%	82.7%	80.0%

Source: Early Years and Childcare Service Annual Childcare Audit 2010

The changes seen in the average hourly costs for childcare in Devon have, on the whole, only been minor changes since March 2009. Although home-based childminder costs and nursery units of independent schools are shown to have decreased in hourly costs all other types of childcare for under 5 year olds have increased slightly and range from an average of £2.80 to £3.53 per hour.

Childminding costs, on average, have decreased by 18p an hour to £3.32, nursery units of independent schools have also decreased in average hourly costs to £3.19 per hour, a decrease of 22p per hour. Private day nurseries have increased by 13p an hour to £3.50, voluntary pre-schools by 21p an hour to £2.80 and private nursery schools have also seen average hourly rates increase by 54p an hour to £3.53.

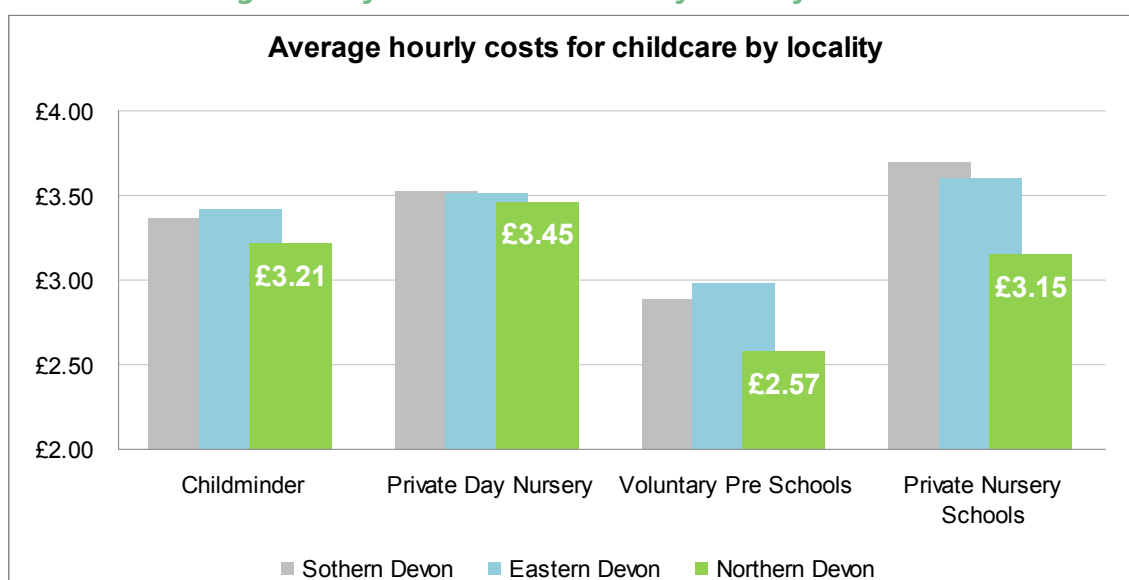


National figures for the hourly cost of childcare¹³ have also been included as a comparison. It should be noted that the figures quoted in the national survey represent the cost of childcare to parents, not the hourly cost charged by providers, so a direct comparison cannot be made.

In the national survey pre-schools appeared to have a much lower cost to parents per hour because these providers are often used just for the entitlement to free early years provision for 3 and 4 year olds, or for only a few hours above and beyond those that were free. However when viewing all other types of childcare provision the hourly cost of both home-based childminding and private day nurseries appears to be below that seen nationally.

The range of hourly costs across care scheme types shows a wide variation for childminders (ranging from £1.50 per hour to £6 per hour); for private day nurseries (ranging from £1.34 per hour to £5 per hour) and voluntary pre-schools (ranging from £1.50 per hour to £5.50 per hour). Both nursery units of independent schools and private nursery schools show a far tighter range in costs per hour but also make up a relatively small proportion of the childcare available.

Chart 41: Average hourly costs of childcare by locality



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Across all care scheme types, the average hourly cost for childcare is lower in Northern Devon than in the rest of Devon and below the Devon average. Differences between hourly costs in Eastern and Southern Devon are far less distinct.

¹³ Childcare and Early Years Survey of Parents 2009, Department of Education, DFR – RR054

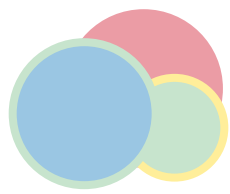
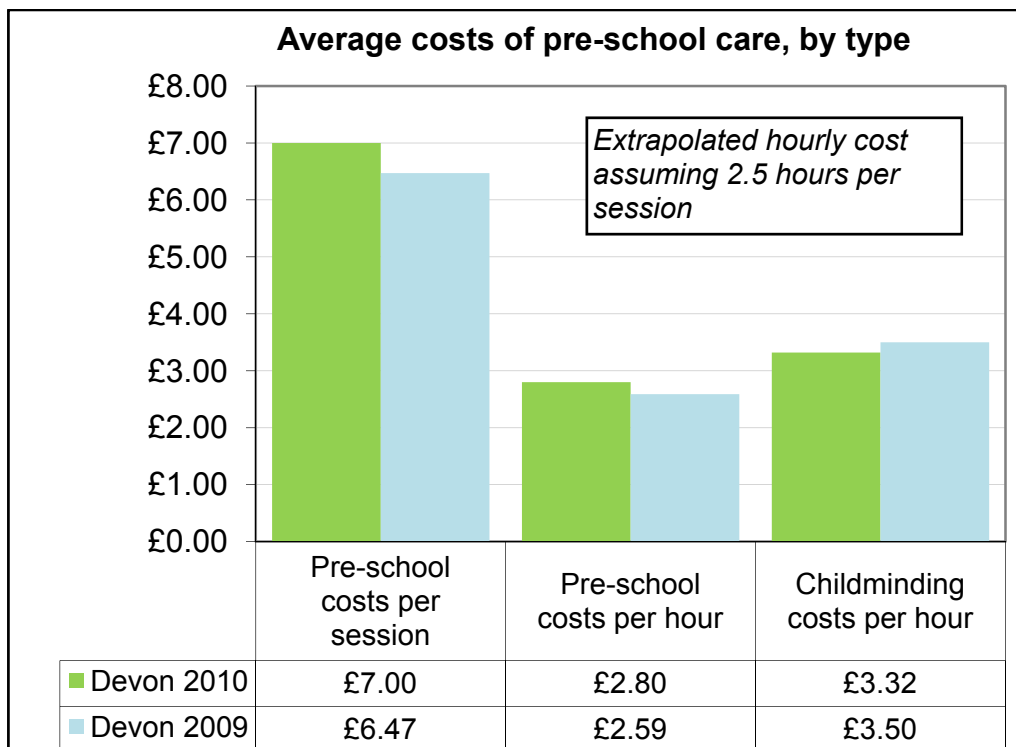


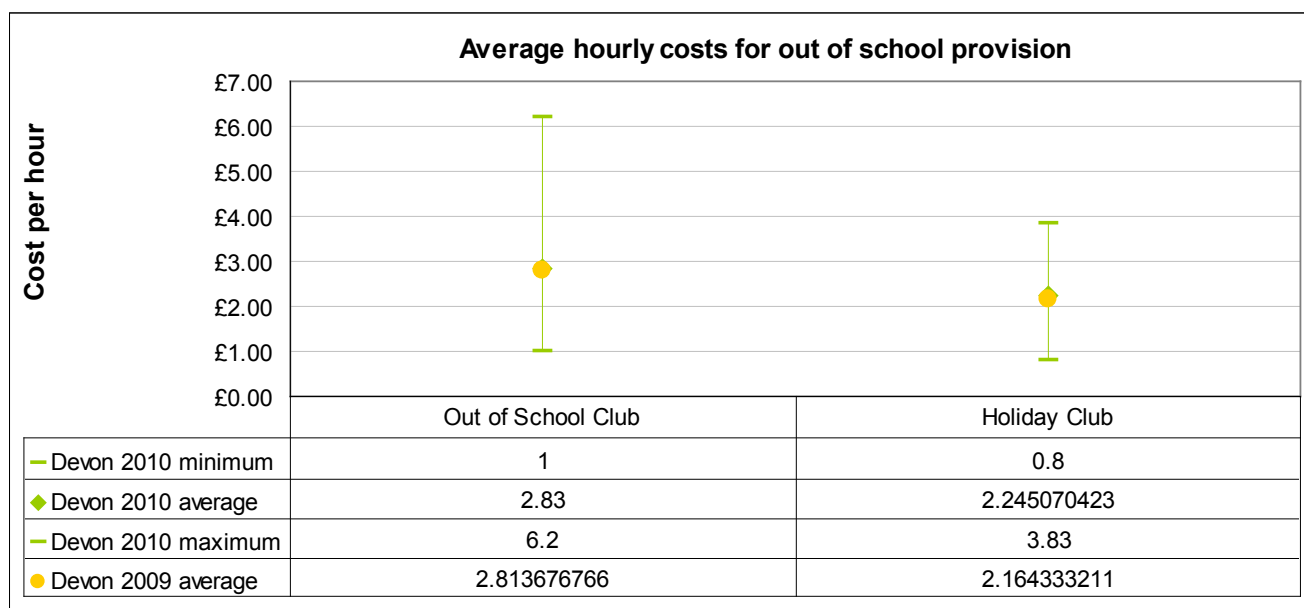
Chart 42: Comparison of childcare pre-school costs



Source: Early Years and Childcare Service Annual Childcare Audit 2010

Chart 42 shows comparative costs for pre-school care between home-based (childminders) and group-based (pre-schools) costs. The average cost of a pre-school session, assumed to be 2.5 hours per session has risen from £6.47 in 2009 to £7 in 2010, an 8% increase. In comparison the equivalent childminding cost would be £8.30 in 2010 as compared to £8.75 in 2009, just over a 5% decrease.

Chart 43: Average costs for out of school provision



Source: Early Years and Childcare Service Annual Childcare Audit 2010

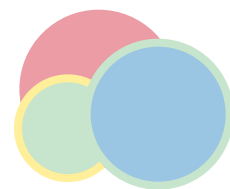


Table 26: Percentage of all providers contributing to costs analysis

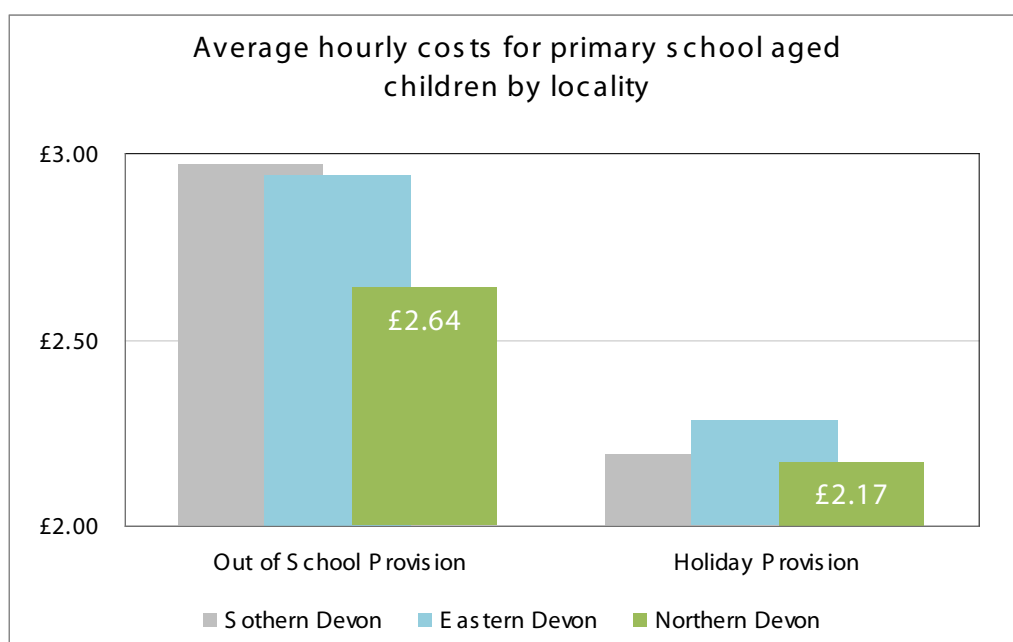
Care scheme type	Out of school clubs	Holiday clubs
All providers	170	114
Providers contributing costs data	114	71
% of providers	67.1%	62.3%

Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

For primary aged children very little change in the costs of out of school provision during term-time have been seen since 2009, and the average hourly rate for all out of school provision remains at £2.83 per hour.

For holiday provision, a slight increase of 4% has been seen with hourly costs rising to £2.25 per hour. Out of school provision shows a wide variability in the range of costs per hour from £1 ranging through to just over £6. National figures ¹⁴ indicate that an average hourly cost for both before and after school provision for primary school children are similar to those seen Devon-wide. Holiday care shows a lesser range from £0.80 per hour to just under £4 per hour.

Chart 44: Average hourly costs for primary aged children by locality



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Again, average childcare care costs for both term-time out of school provision and holiday care are lower in Northern Devon than across the rest of Devon.

¹⁴ Childcare and Early Years Survey of parents 2009, Department of Education, DFE-RR054

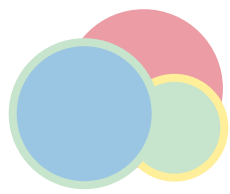
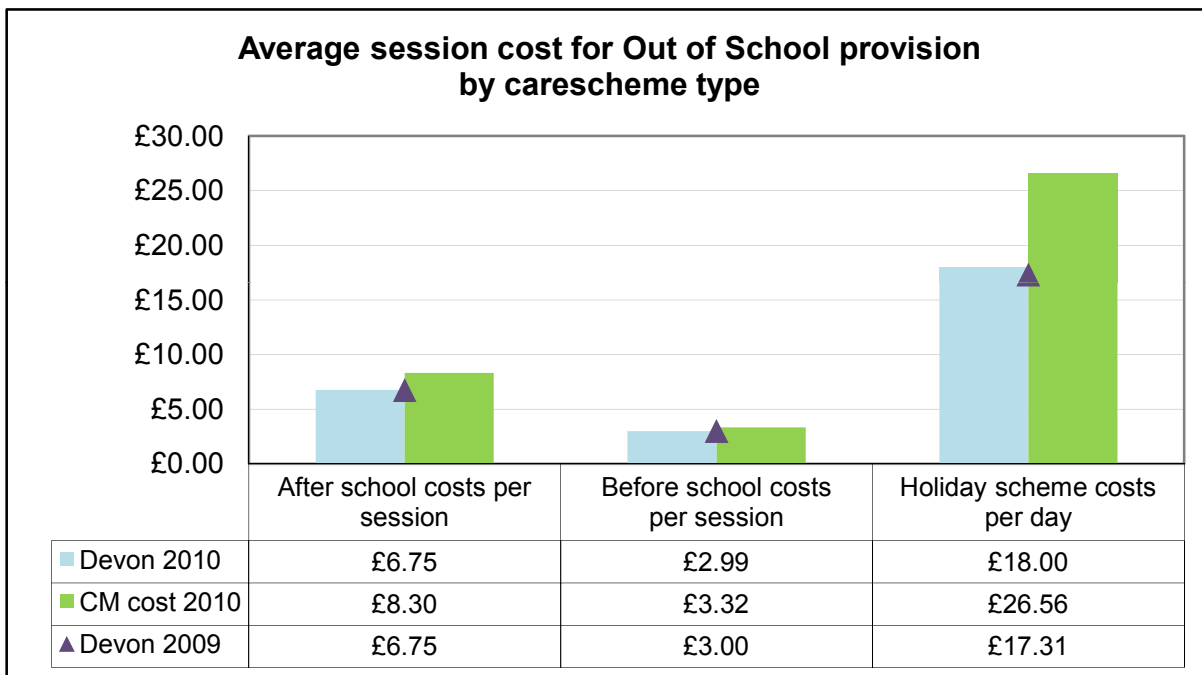


Chart 45: Comparison for out of school provision costs



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

For out of school provision, home-based childminding costs are higher than group-based care. After school provision, assumed to be 2.5 hours, has seen no change since 2009 and remains, on average, at £6.75 per session. The same is seen for before school costs which have remained at just under £3 per hour. Holiday care costs per day have increased by 4% to £18 per day as compared to £17.31 in 2009.

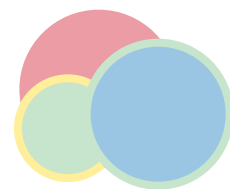
The equivalent childminding costs for holiday care, assumed to be 8 hours a day are significantly higher for childminders estimated at £26.56 per day. This comparison is based solely on the average costs per hour and does not take into consideration any discounts.

Parents' views on paying for childcare

Overall 85% of parents in the Hempsall survey who were using childcare were quite or very satisfied with the cost of their current childcare. A small percentage of respondents (8%) expressed dissatisfaction with their current arrangements.

A lower percentage of parents and carers of disabled children and children with additional needs were satisfied with the cost of their current childcare arrangements (80% compared to 85% overall).

Patterns for respondents indicating dissatisfaction with the cost of their childcare arrangements were similar across formal and informal childcare. Users of informal childcare in particular were very satisfied with the cost of their current childcare; it is highly probable that informal care is provided free of charge, for a nominal fee or as part of a reciprocal arrangement.



Satisfaction with the cost of current childcare arrangements was similar across all household income bands. Satisfaction levels with costs of childcare are only relevant to those using childcare; higher proportions of households with lower income (less than £20,000) were not using any form of childcare.

A higher proportion of respondents with a lower annual household income (less than £20,000) who were not using formal childcare at the time of the survey would use formal childcare if suitable and affordable care was available. This suggests that cost is a barrier to using formal childcare for households with a lower annual income.

Children's views on paying for childcare

When asked about what they would change about what they do in the holidays, children would like more clubs to go to, more activities and ideas of things to do. The main barrier to accessing their chosen provision is cost; 40% of the children mentioned this. Other barriers to accessing their chosen provision included lack of time, transport difficulties and 'not being allowed to go'. Cost was also perceived as a barrier to accessing their chosen provision for children in special schools; they also mentioned parents and carers as a barrier.

Providers' views on paying for childcare

Providers were also asked their views on the affordability of childcare. 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.

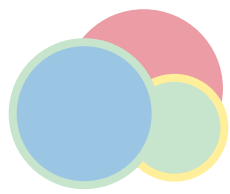
80% of early years settings, 50% of schools and 50% of children's centres think that childcare is affordable, or that it is affordable with the support of Childcare Tax Credits. The majority of providers, across all types, think that it is just affordable with Childcare Tax Credits. This shows the importance of the contribution that Childcare Tax Credits make to affordability and the importance of promoting take up.

In 2010 providers report that for the first time since they have been operating, parents were struggling to pay their bills and in some cases were not paying them. This suggests that the cost was becoming unaffordable to families. This could be due to the financial situation the family is in, or the level of fees in the provision. In some cases providers report they are being creative about charging 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 not taking up Childcare Tax Credits makes childcare expensive for some families.

Employers' views on the cost of childcare

For employers consulted in Devon the cost of childcare was seen as the key concern. It was the one topic many participants have a unanimous view on; that childcare provision is too expensive (54%) and in some instances the financial benefit conferred by childcare vouchers is simply not enough. This raises the question of whether employees are getting high quality affordable childcare, and if the cost of childcare is outweighing the benefits of returning to work. Issues of affordability may also be restricting employees in their choice of provision.



Quality of childcare

Under Section 6 (1) of **The Childcare Act 2006**, the local authority has a duty to secure sufficient high quality childcare. There are a number of factors which can be regarded as the 'benchmark' of sufficiency. One of these benchmarks is: 'Childcare places are high quality, in terms of judgements made by Ofsted.'¹⁵

For childcare to be sufficient it must be of high enough quality to improve outcomes for children and young people. High quality provision also focuses on reducing inequalities and under section 1-4 of **The Childcare Act**, local authorities and their partners are required to reduce inequalities in outcomes for young children aged 0-5 years; and this is supported by statutory early years targets on local authorities, the [Early Years Outcome Duty \(EYOD\)](#).

In securing sufficiency, local authorities need to commission and secure childcare that is high quality. This requires setting a clear vision for quality services, benchmarking and reviewing quality and using strong performance management. To this end **The Childcare Act 2006** introduced a new legislative framework for quality and standards in early learning. From September 2008 the [Early Years Foundation stage \(EYFS\)](#) came into force, setting out a quality framework for children's learning, development and care in all settings, including home-based care.

Under **The Childcare Act** the government introduced a new registration framework in September 2008, Ofsted now operates two registers:

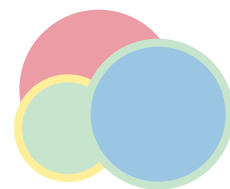
- The Early Years Register (EYR) for care for children from birth to the 1 September following their fifth birthday
- The Ofsted Childcare Register (OCR) consisting of 2 parts:
 - The compulsory part for care for children aged 5 to 7 years
 - The voluntary part for care for children of any age that is not required to be registered.

Continuous quality improvement needs to be a central and on-going priority, built in at every stage of service development. We aim to work with all providers, whether or not they are required to register, to continually improve the quality of their provision.

We provide an extensive range of support services which contribute to the quality of settings and childminders. This includes people, resources, expertise and financial investments. We aim to provide effective co-ordination of support services so that they complement each other, provide consistent support and share information on settings progress.

In 2009 Devon's Quality Improvement Strategy, seeking to improve quality in early years and out of school settings, set in place an audit of quality using the Early Childhood Environmental Rating Scale (ECERS) family of measurements as standard tools for assessing quality.

¹⁵ Securing sufficient childcare: Guidance for Local Authorities Childcare Act 2006



We also:

- developed a whole team approach; harnessing the commitment of advisory and development worker teams in the Early Years and Childcare Service, Devon Education Services and contracted organisations who support settings, such as Trio Childcare
- started including a support and challenge role during visits to settings, and training and workshop sessions which encourages settings to develop self-reflective practice techniques, recognising their strengths and weaknesses and make full use of their Ofsted Self-Evaluation Form (SEF) with actions to improve
- encouraged and promoted the celebration and communication of achievements in settings to families, the general public, other settings and stakeholders which is an important part of quality development.

Operational planning was based on the national Quality Improvement Principles and the six strategic priorities which ran through the planning as a golden thread.

Priority 1: To support and train childcare setting leaders so that they can provide more effective leadership and management.

Priority 2: To encourage settings to develop a greater ability to use and engage in self-reflective practices to maintain continuous quality improvement.

Priority 3: To promote the Early Years Professional Status and provide support to Early Years Professionals working in early years provision through setting up a support network, training and development opportunities.

Priority 4: To support employers in the childcare sector with recruitment and selection procedures (including vetting procedures), induction and on-going supervision and management.

Priority 5: To provide a wide range of funded opportunities for workforce training and development.

Priority 6: To support continuous quality improvement in childminding care through the introduction of a new Devon Network framework which introduces a set of levels including specialist childminding care through which childminders can advance. This will be underpinned by the pre-registration preparation, training, qualification and support through the contracted support organisations.

Since 2008 through the implementation of all of these actions the level of quality in Devon's childcare settings has continued to rise as demonstrated in Ofsted outcomes.

Ofsted outcomes

The current standard measure for the quality of childcare is the Ofsted inspection outcome which is made over a three year cycle. The last cycle ended in August 2008 and Ofsted introduced the two new childcare registers in September 2008. Most childcare providers, unless they care only for children over 5 years of age or are school-based, register with both registers.

The Ofsted outcomes in Chart 46 show the Ofsted outcomes for April 2009 to March 2010, and compares the outcomes to the Devon outcomes from the last childcare sufficiency assessment update (April 2008 to March 2009) and against the national outcomes (September 2008 to June 2010).

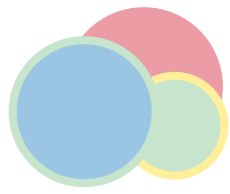
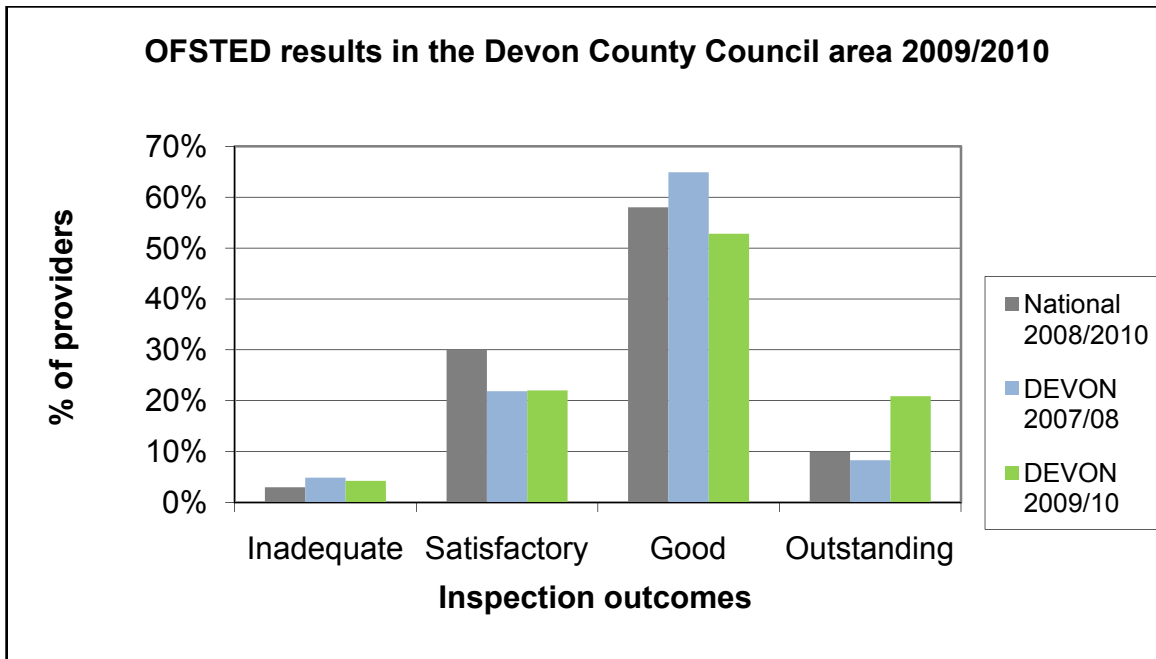


Chart 46: Distribution of Ofsted grades Devon-wide compared to the national average



Source: *Early Years and Childcare Service, Devon County Council 2010*

One in five providers in Devon were awarded an Outstanding overall Ofsted outcome in the last year, compared to the national outcome of one in every ten providers. This represents 74 out of 324 providers who underwent an Ofsted inspection during April 2009 to March 2010. The number of providers receiving an overall Good outcome (53%) is slightly lower than the national outcomes (58%), but this is offset by the high level of Outstanding awards. Nationally, one in every three providers was awarded a Satisfactory or Inadequate outcome. In contrast, across Devon this is at just over one in every four providers.

Seven Learning Communities had more than a third of providers who underwent an inspection receiving an Outstanding Ofsted outcome; Teignmouth, Clyst Vale, Dawlish, South Dartmoor, Crediton, Braunton and Culm Valley, compared to four learning communities the previous year.

Just under two-thirds of all Learning Communities in Devon (18 out of 29 Learning Communities) did not receive any Inadequate' Ofsted outcomes.

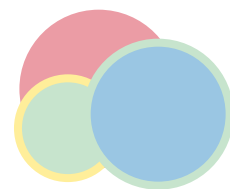
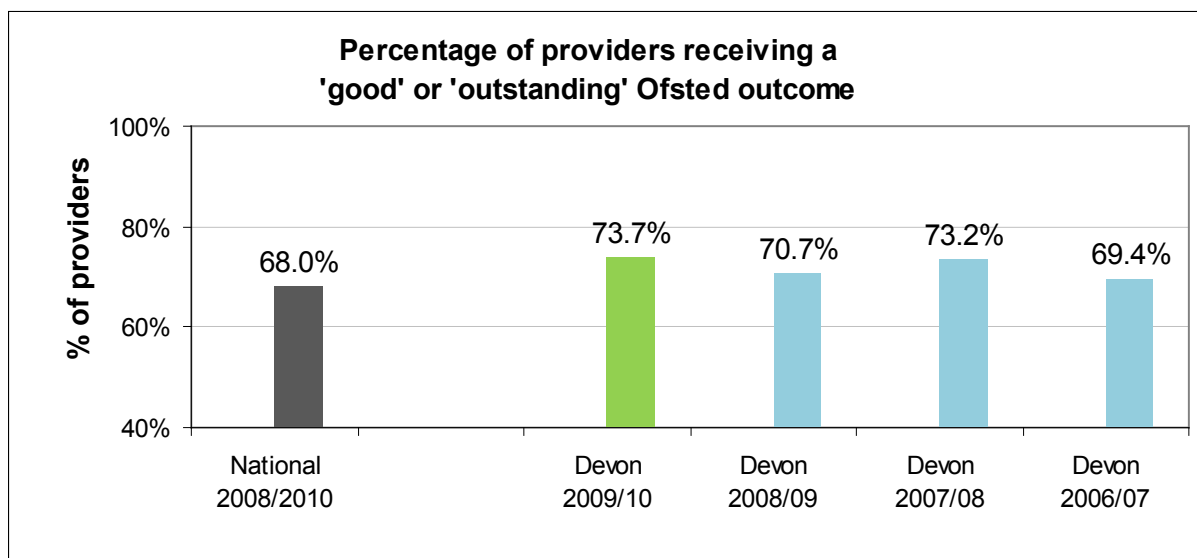


Chart 47: Percentage of providers receiving a Good or Outstanding Ofsted outcome



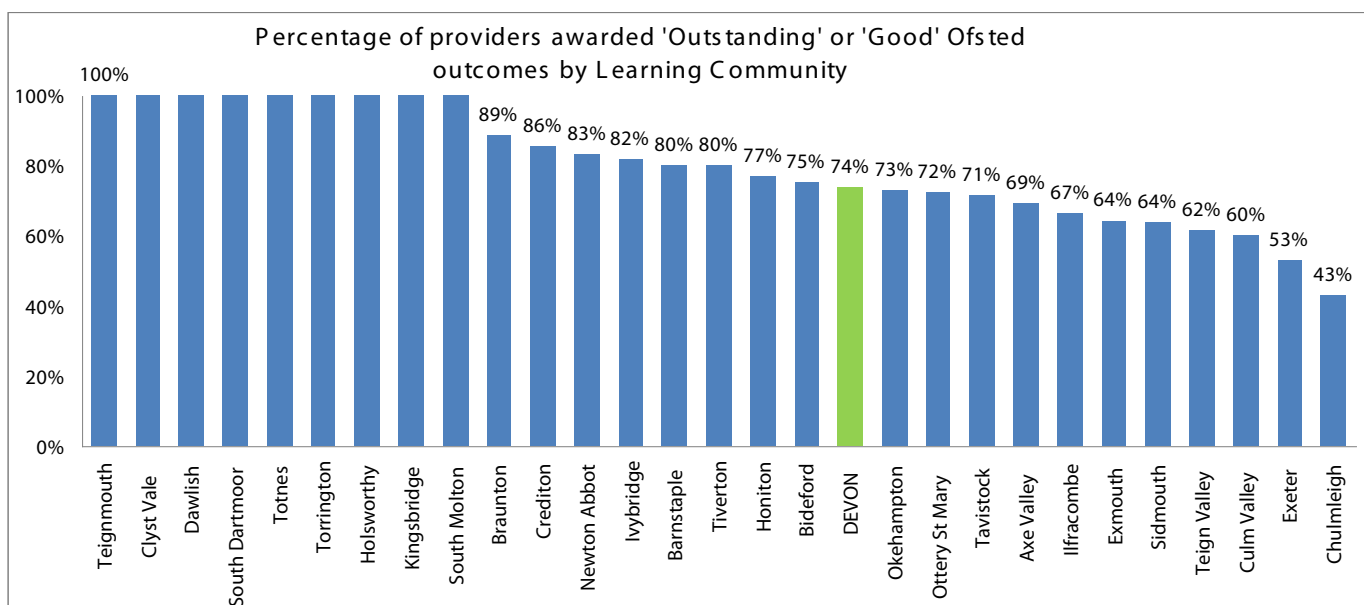
Source: *Early Years and Childcare Service, Devon County Council 2010*

Chart 47 looks at the percentage of providers who underwent an Ofsted inspection and were awarded a Good or Outstanding Ofsted outcome over the last four years. Devon has remained consistently high and above the national average.

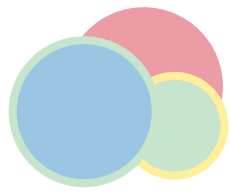
The number of Learning Communities where all providers inspected were awarded a Good or Outstanding grade has increased since last year from two learning communities (Braunton and South Molton) to nine Learning Communities during April 2009 to March 2010 (Teignmouth, Clyst Vale, Dawlish, South Dartmoor, Totnes, Torrington, Holsworthy, Kingsbridge and South Molton).

Three Learning Communities had 60% or lower providers awarded a Good or Outstanding grade, compared to six Learning Communities in the previous year.

Chart 48: Percentage of providers awarded a Good or Outstanding Ofsted outcome



Source: *Early Years and Childcare Service, Devon County Council 2010*



The Early Childhood Environment Rating Scale – Revised (ECERS-R)

In 2009 we set up a new process for identifying good and weak practice through a number of different routes to improve the quality of childcare. In the early years sector a full quality audit of all early years group settings was planned using the ECERS measurement tool. This is a standardised measurement instrument of quality which has been used on many national research studies, including the EPPE research programme.

ECERS is a tool for measuring and improving the quality of early years provision. It can provide a structured approach to quality assessment which is grounded in research and practice and is still evolving.

The scale measures the quality and effectiveness of early years provision in terms of:

- practitioner experience, qualifications and training
- the learning environment
- children's involvement and participation
- children's development outcomes.

The scale focuses on the 'learning environment' provided by settings and schools. It provides a structure for recording what's happening in the learning environment so that elements can be developed.

The scale is an observational rating scale. Information is gathered in one room or group of children over a period of 3-4 hours and is often completed with pairs of observers working together. Some time is allowed for questions and discussion with staff. The observation looks at space and furnishing, personal care routines, language and reasoning, activities, interaction, programme, parents and staff. It provides a detailed and comprehensive snapshot of provision and a standardised tool to make comparisons, nationally and across local authorities.

In addition it can be used as an evidence base for advisory and development worker teams who visit and advise settings on their practice.

For specialist childminders in early learning we are also using the [Family Child Care Environment Rating Scale \(FCCERS\)](#) as a tool for observing the quality of their practice before they are accepted as providers of the free entitlement.

The [School Age Care Environment Rating Scale \(SACERS\)](#) is being used for auditing the out of school care in a similar way to ECERS.

The scale offers comprehensive statements or indicators with which to judge the quality of the environment in its broadest sense. These indicators stack up like building blocks to celebrate strengths and signpost to improvement. They also provide a rigorous means of measuring quality and improvement in quality over time. The ECERS-R assess seven broad dimensions of quality.

The majority of early years full daycare settings across Devon have been accessed using the ECERS-R tool.

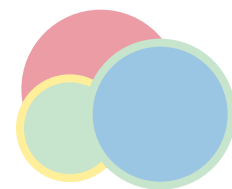
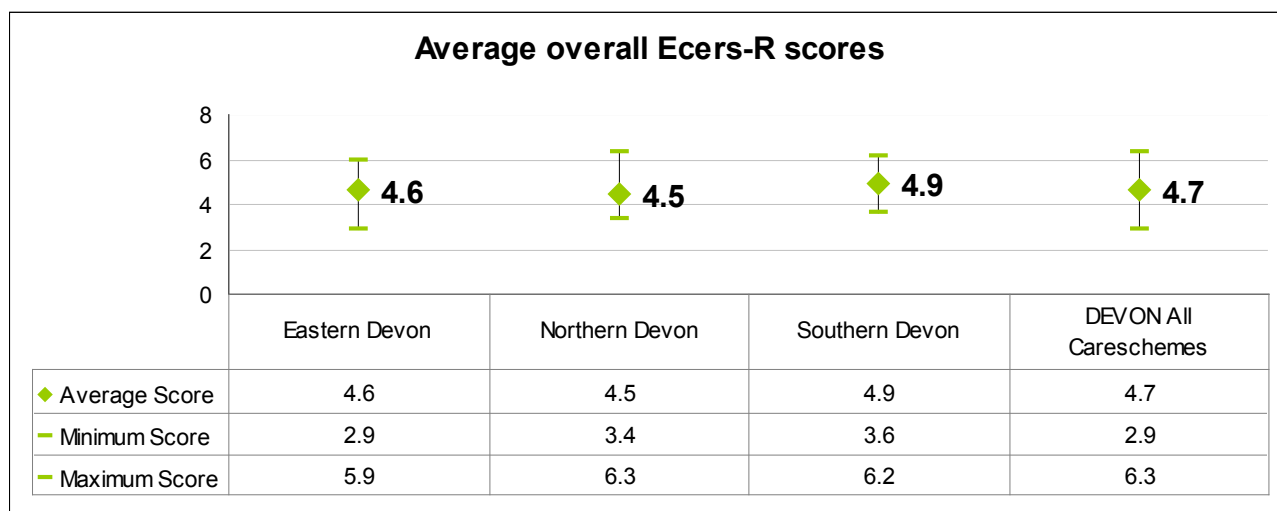


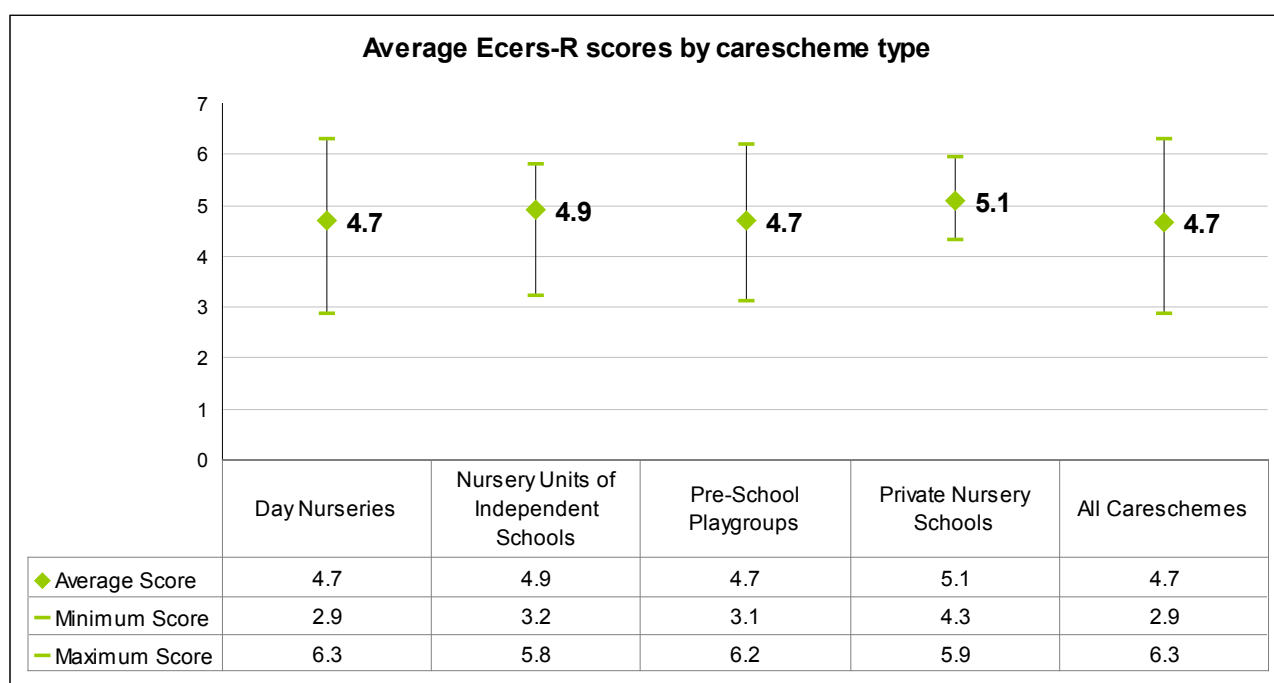
Chart 49: Overall average ECERS-R score for full daycare settings in Devon



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

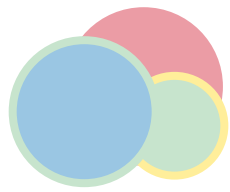
The overall average ECERS-R score across all early years settings in Devon is 4.7 from a maximum of 7. Results have shown a range from 2.9 to 6.3. Southern Devon settings are on average slightly higher than the Devon-wide average, Eastern and Northern settings are slightly below. Eastern Devon has the lowest overall ECERS-R score of 2.9 while Northern Devon has the highest overall score of 6.3.

Chart 50: Overall average score by care scheme type



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

Private day nurseries and voluntary pre-schools show the greatest variability in the range of overall scores awarded, but also make up the majority of group-based childcare available for early years settings. Private nursery schools have a far smaller range of scores awarded.

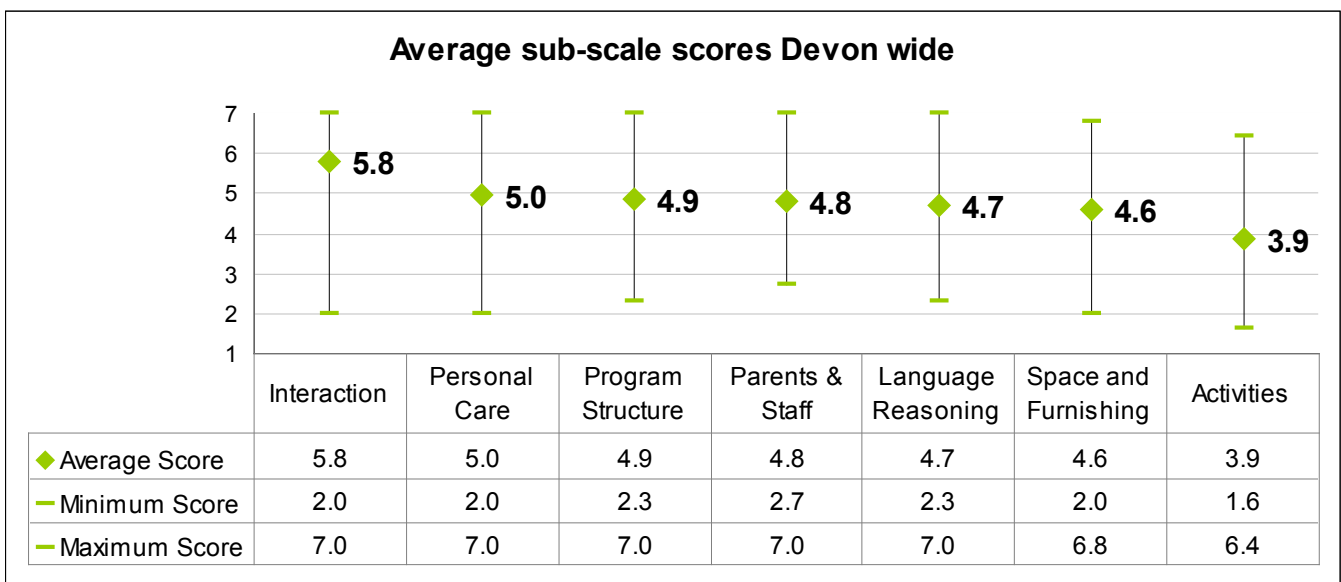


The ECERS-R assesses seven broad dimensions of quality, known as sub-scales. These subscales are:

- space and furnishings
- personal care routines
- language and reasoning
- activities
- interaction
- programme structure
- provision for parents and staff.

Chart 51 shows the overall range of sub-scale scores awarded across all care scheme types. The data is organised to show the highest to lowest scoring sub-scale.

Chart 51: Average sub-scale score across Devon



Source: *Early Years and Childcare Service Annual Childcare Audit 2010*

The highest scores across Devon are seen in Interaction, for example supervision of children and the lowest scores in Activities, for example music and movement.

All sub-scales show a fairly wide range in the scores awarded. In five out of the seven categories, the top score of 7 has been awarded to at least one setting. The greatest variation in ranges is seen with Interaction and Personal Care Routines, for example safety practices, the two highest scoring sub-scales.

Within each of the sub-scales are a set of categories. The analysis below looks at the individual category scores in each sub-scale to establish specific strengths (categories where over half of all providers were awarded a score of 6 or above) and areas of weakness (categories where at least a third of all settings were awarded a score of 3 or lower).

We will use the outcomes from the ECERS audit to guide future planning and resources to target areas of weakness, assess the impact of initiatives by measuring change, support settings' self assessment and celebrate strengths.

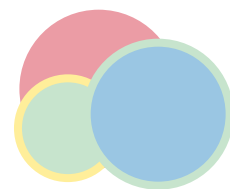
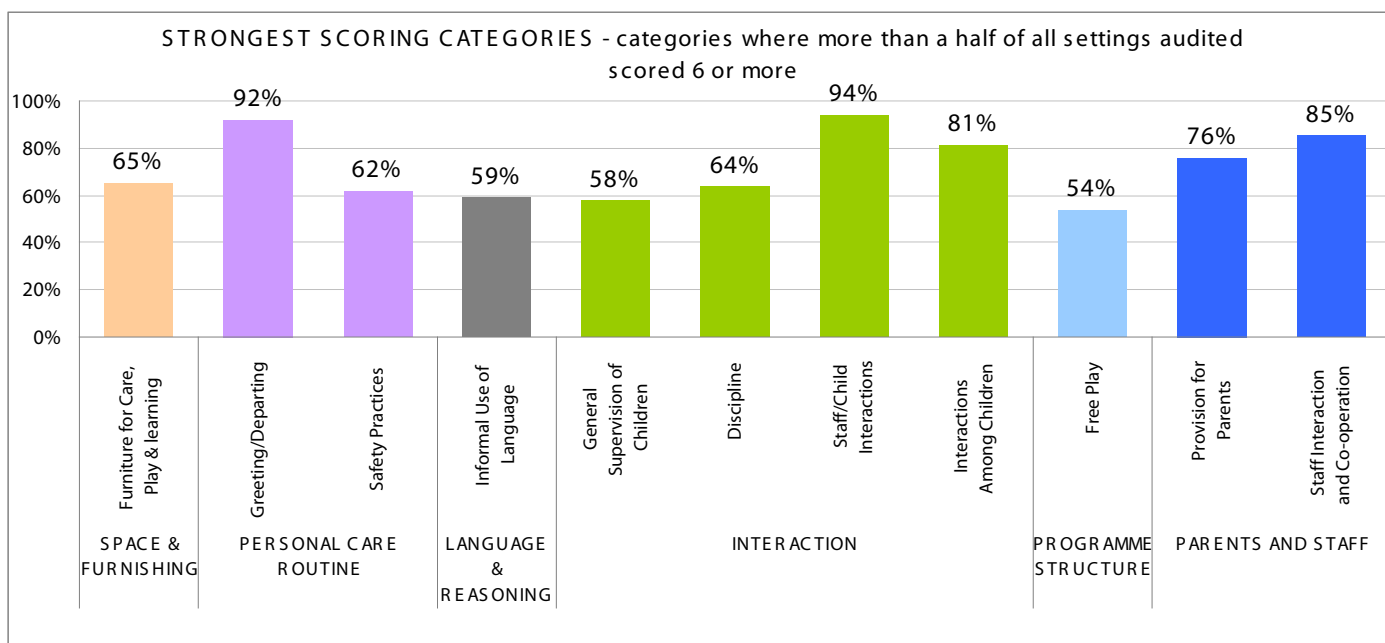


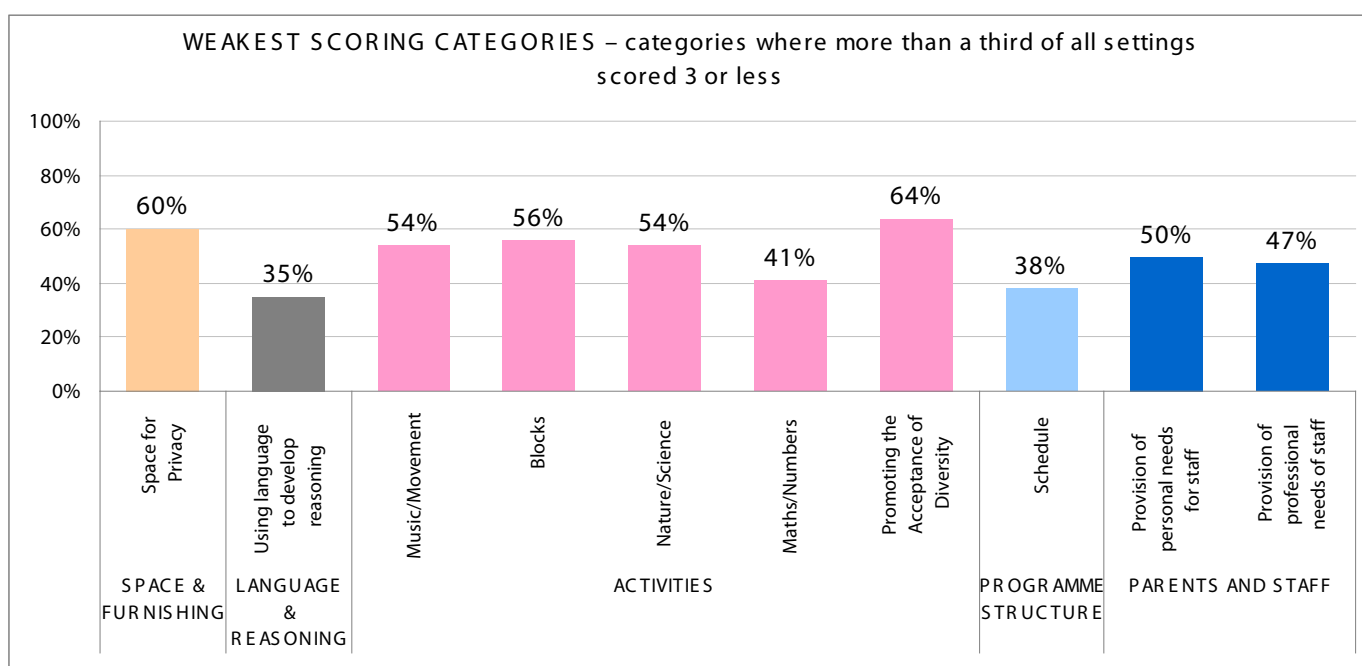
Chart 52: Strengths – categories where at least half of all settings were awarded a score of 6 or more



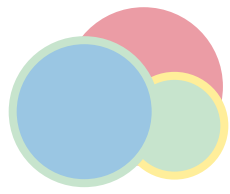
Source: Early Years and Childcare Service Annual Childcare Audit 2010

Overall Interaction is one of the highest scoring sub-scales and within this certain areas are highlighted as very strong areas, in particular Staff and Child Interactions, Interactions among children, Discipline and General Supervision. However, the results also show areas within lower scoring sub-scales that have high outcomes, particularly Greeting and Departing and Staff Interaction and Co-operation.

Chart 53: Weaknesses – categories where at least a third of all settings were awarded a score of 3 or lower



Source: Early Years and Childcare Service Annual Childcare Audit 2010



Overall Activities is the lowest scoring sub-scale across Devon settings with five out of the ten categories within this sub-scale having at least a third of all settings scoring 3 or less.

Views on childcare quality

Parents' views on quality

In the Hemsall's research two thirds of respondents reported that the quality of childcare provision was very or quite good. Very few, only 12%, reported that it was poor. Nearly a quarter of respondents said they didn't know. This compares to national figures¹⁶ where 64% of parents thought that provision in their area was either very or quite good.

Opinions about the quality of childcare differed. A lower proportion of respondents living in rural communities felt the quality of childcare provision locally was good and a relatively high proportion (18%) felt the quality of childcare locally was poor. In contrast a higher proportion of respondents living in mixed areas (town and fringe) reported the quality of childcare locally as good and a lower proportion felt the quality of childcare locally was poor.

Interestingly a higher proportion of respondents using formal childcare and a combination of formal and informal childcare reported the quality of childcare provision in their local area to be good, in comparison to parents only using informal childcare or not using any childcare. This finding was also seen in the national survey where families using formal childcare were more positive about the quality of local childcare than those who used no childcare.¹⁷

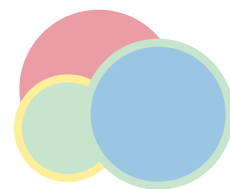
98% of respondents using formal and informal childcare reported being satisfied with the quality of their current childcare (1,137 respondents). Again there was a consistent pattern of responses regardless of whether the respondents were using formal, informal or a mix of childcare. 99% of respondents using informal care (465 respondents) were satisfied with the quality of their childcare; 97% of those using formal childcare (322 respondents) were satisfied with the quality and; 95% of respondents using both formal and informal childcare were satisfied with the quality (340). Parents of younger children were more likely to report that the quality of childcare provision in their local area was good than parents of older children.

Children's views on quality

In terms of activities children currently do after school, outdoor play, activities and games were most popular followed by watching television and video games and playing games with friends. Boys tended to prefer outside activities or playing computer games while girls preferred more indoor activities such as arts and crafts. These activities were also some of the things they enjoyed best about their childcare. Being with friends is very important to children and young people for activities to be fun. However, importantly many children felt their lives were too busy; they wanted more time to chill out. On the other hand some children and young people reported they wanted more after school activities.

¹⁶ Childcare and Early Years Survey of Parents, 2009, Department of Education, DFE-RR054

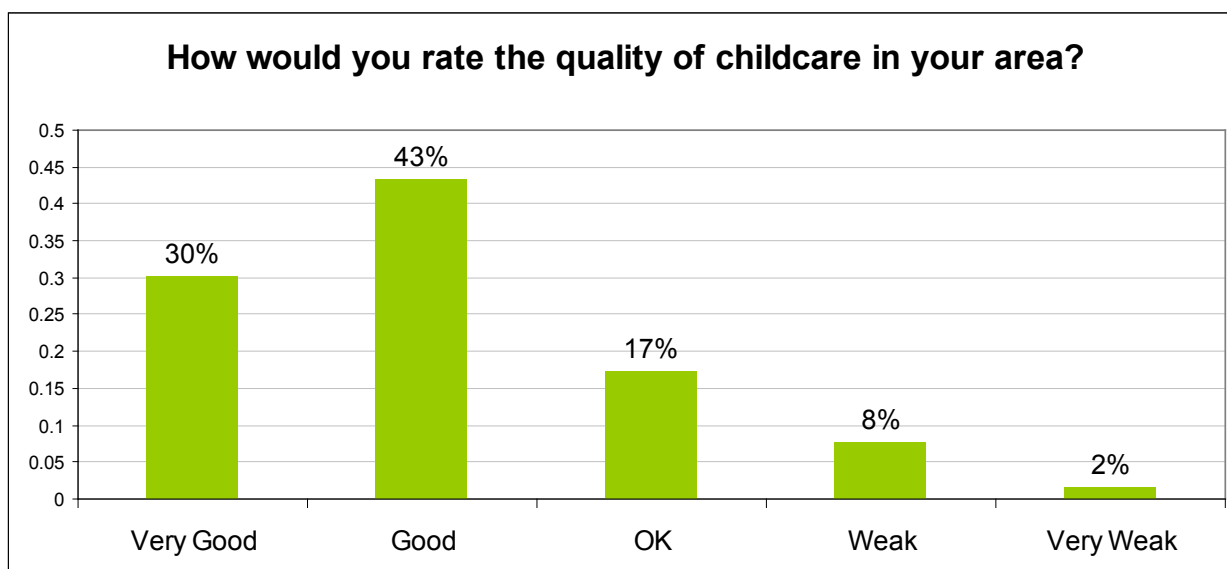
¹⁷ Childcare and Early Years Survey of Parents 2009, Department of Education, DFE-RR054



Providers' views on quality

Schools, children's centres and childcare providers were asked their views on the quality of childcare in their area.

Chart 54: Quality of childcare



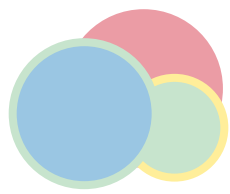
Source: Parent and Carer Survey, Hemsall's March 2010

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.

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, while 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 parents 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.



Childcare gap analysis

The analysis of supply and demand for childcare in Devon in this Childcare Sufficiency Assessment demonstrates that for a very high proportion of Devon's parents the childcare available meets their needs.

For the two-thirds of parents not using formal childcare at the time of the survey, a large proportion used informal childcare and very few indicated that lack of available childcare was a barrier to take up. The data from the survey suggests that of those who are not using any formal childcare, the majority do so by choice and would not use formal childcare even if suitable and affordable care were available.

There are a small number of geographical locations that have a slight shortfall in provision, but in the main the development work completed by the Early Years and Childcare Service over the preceding years has filled the gaps highlighted in the 2008 Childcare Sufficiency Assessment.

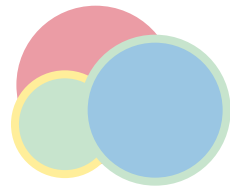
The overall findings of this report show that across Devon there are sufficient places for the amount of childcare required, that this provision is of high quality and is affordable.

This chapter analyses the supply and demand of childcare provision across Devon highlighting potential gaps in the local childcare provision with regards to:

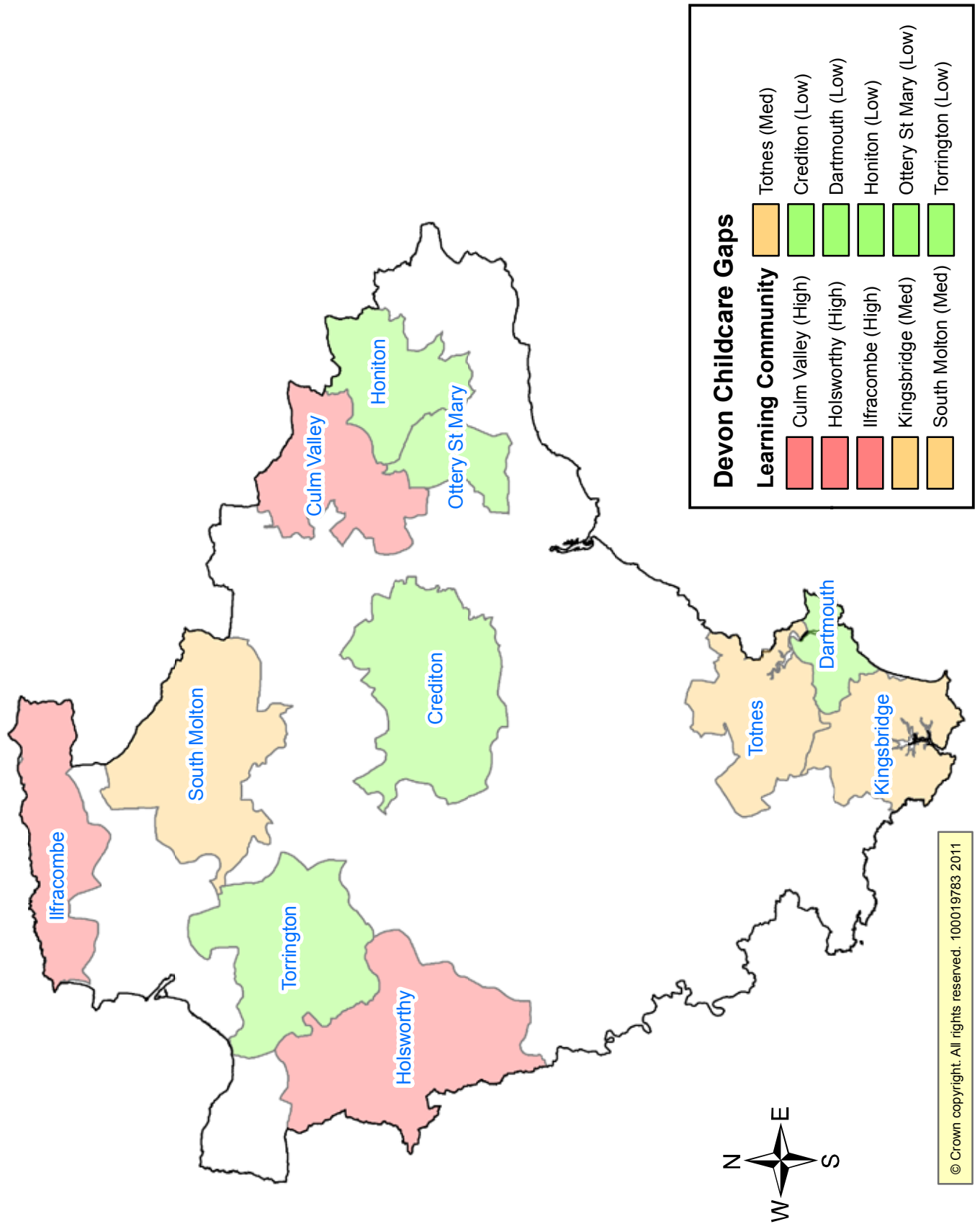
- **geographical gaps** – a shortage of childcare places in an area
- **specific needs gaps** – a shortage of childcare for disabled children or children with specific additional needs
- **income gaps** – a shortage of affordable childcare
- **availability gaps** – a shortage of childcare provision at the times needed
- **age gaps** – a shortage of childcare provision for specific age groups.

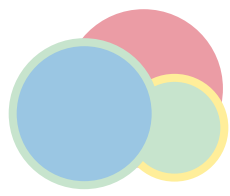
Geographical gaps

There are a number of Learning Communities in Devon where the supply and demand analysis suggests a potential geographical gap in the current childcare provision.



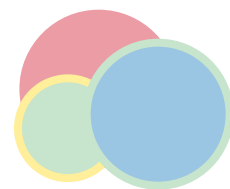
Map 3: Learning Communities where supply and demand analysis has indicated that a geographical gap in childcare provision may exist





Crediton	Analysis suggests there is a shortage of places for 3 to 4 ½ year olds (9 places during term-time).
Culm Valley	Analysis suggests there is a shortage of full daycare places for under 3 year olds (7 places) and of holiday places for 3 to 4 ½ year olds (35 places). In 2011, all schools will be expected to implement a single offer point which will mean that the majority of four-year-olds will commence school in autumn term. Even allowing for a decrease in the number of 4 year olds requiring an early years place, there will still be a predicted shortfall of some 40 places in 2012. The shortfall of places is maintained because of an increase in the birth rate and planned housing development.
Dartmouth	Analysis suggests there is a small shortage of out of school provision for primary aged children (4 places)
Holsworthy	Analysis suggests there is a shortage of full daycare places for under 3 year olds (5 places) for 3 to 4 ½ year olds, (20 places during term-time and 7 places during holidays) and out of school provision for primary aged children (32 places).
Honiton	Analysis suggests there is a shortage of full daycare places for under 3 year olds (11 places)
Ilfracombe	Analysis suggests there is a shortage of out of school provision (38 places) and holiday provision (17 places) for primary aged children.
Kingsbridge	Analysis suggests there is a shortage of places for 3 to 4 ½ year olds (16 places during holidays).
Ottery St Mary	Analysis suggests there is a small shortage of places for 3 to 4 ½ year olds (4 places during term-time) and out of school provision for primary aged children (7 places).
South Molton	Analysis suggests there is a shortage of out of school provision for primary aged children (26 places).
Torrington	Analysis suggests there is a shortage of places for 3 to 4 ½ year olds (10 places during holidays).
Totnes	Analysis suggests there is a shortage of out of school provision (16 places) for primary aged children.

The parents' survey asked parents whether they felt there were sufficient childcare places available to meet their needs. Overall 39% of all parents felt there were sufficient childcare places in their local area, an increase from 25% in 2008. Learning Communities showing a lower percentage of parents reporting that were sufficient childcare places were Clyst Vale (28%), Dartmouth (25%), Kingsbridge (32%), Newton Abbot (30%), Okehampton (26%) and Torrington (22%).



Specific needs gaps

The parents of **disabled children or who have children with additional needs** use a mix of informal and formal childcare, although their use of informal childcare is higher than for all parents. They were less satisfied that their current childcare arrangements met their needs than all parents, particularly for older disabled children. They were also more concerned about the quality of care provided and that there was not a sufficient quantity of places. Some parents reported that there is a lack of childminding care for disabled children and care in more rural locations.

High costs were also highlighted as an issue. Barriers to the use of childcare related to the skills and training of the childcare workforce, facilities available and a lack of information on the availability of childcare for disabled children.

Although childcare providers in Devon aim to offer inclusive provision they also identify that they have barriers, such as access through use of community buildings the need for staff training. Analysis of the training levels of the childcare workforce also reveals that more training is needed for home-based childminders and the workforce in the out of school sector.

Specific gaps identified were:

- access to information for parents of disabled children on availability of childcare
- skills and training of the childcare workforce particularly childminders, home childcare workers and staff from out of school settings in caring for disabled children
- familiarity with childcare provision - which was important to parents
- lack of childminding care for disabled children and care in more rural locations
- availability of suitable facilities
- costs of childcare and support available to parents of disabled children.

Parents from Black and Minority Ethnic Groups (BME) where English is an additional language have barriers to accessing childcare. Their take up of the free entitlement for 3 and 4 years olds is low. Communication between the childcare provider and the child is seen as critical importance.

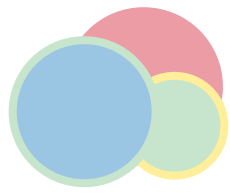
Specific gaps identified were:

- need for childcare providers to be more welcoming to parents from black and minority ethnic communities
- low numbers of childcare workers from Black and Minority Ethnic communities
- need for clarity over rules for using friends for childcare
- low take-up of the free early years entitlement by Black and Minority Ethnic children.

Young parents aged under 25 were concerned about the local availability and flexibility of childcare and also the access when it involves transport. Paying up front for childcare fees was also an issue.

Specific gaps identified were:

- lack of awareness of childcare provision and Care to Learn funding, particularly in the 18-20 year age group
- need for childcare providers to be more welcoming to young parents, particularly teenage parents
- need for more early years free entitlement provision during the school holidays.



Gypsy, Roma and Traveller families mainly choose to home-educate their children. However, parents are using pre-schools and nursery provision. They consider trust as the key factor in choosing a childcare facility.

Specific gaps identified were:

- lack of information on types of childcare and how they operate
- not being able to have dual registration of the free early years entitlement, as with schools, for Gypsy, Roma and Traveller children.

Parents with mental health conditions prefer to use informal childcare but they do also use formal childcare.

A specific gap identified was:

- emergency or short-notice childcare.

Armed Forces families do have specific needs for childcare. Their use of informal childcare is lower with relatives often living at a long distance and their partners away from home on duty. Holiday care was seen as a specific need.

Income gaps

The cost of childcare in Devon varies according to type and age group. In general average cost for childminders, private day nurseries and nursery schools are fairly similar but pre-schools are often cheaper. Childminders are also slightly more expensive than out of school care.

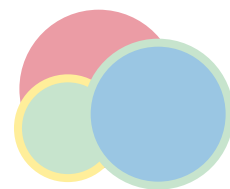
Devon-wide the percentage of parents not using any form of formal childcare is 64% of which 61% do so out of preference. The remaining 37% of parents currently not accessing any formal childcare indicated that if suitable and affordable childcare was available they would use it. Cost was identified as an issue for 18% of families not using formal childcare. It was the most common barrier mentioned by families, other barriers were mentioned by less than 6% of families. This may represent a potential affordability gap among current non-users of formal childcare.

The data also suggests a relationship between the use of childcare and household income. A higher proportion of households with an annual income of less than £20,000 were not using childcare, formal or informal, at the time of the survey.

For parents currently using formal childcare (36% Devon-wide) the overall levels of satisfaction with affordability are high (85%). Lower levels of satisfaction with the cost of childcare were reported in Braunton (73%), Culm Valley (71%), Dawlish (77%) and Exeter – West Exe (72%).

Parents were confused about the available support for childcare costs through the Childcare Tax Credit system and this is confirmed by the low take up of Childcare Tax Credit in Devon.

Childcare providers have found that some parents have had difficulties in paying for childcare during the last year. As a group they feel that childcare is just affordable to parents with the help of Childcare Tax Credits. Employers and children also see cost as a barrier to take up of more childcare.



This is particularly true for low-income parents who would like to access more childcare if it was affordable. This issue has led to low take up of childcare in the more disadvantaged communities of Devon which affects the viability of childcare provision in these areas. This has been illustrated through new childcare places being developed over the last five years which have failed to be viable through lack of take up of places.

Throughout this Childcare Sufficiency Assessment there has been a recurring theme that the northern part of Devon, Torridge and North Devon districts, are areas with low levels of skills and of low income. Torridge is the second to lowest income district in the UK. The low level of income affects the viability of childcare in this area. This has been demonstrated by the high number of new childcare places which were financially supported by the Early Years and Childcare Service to develop and which subsequently closed through lack of take up.

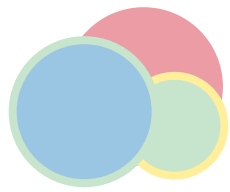
Availability gaps

Childcare providers have gradually increased their opening hours, the majority of childminders and private day nurseries open between the hours of 8am and 6pm, 5 days a week. Over half of all holiday clubs open similar hours. The greatest increase in hours has been in the voluntary pre-school sector where many are opening earlier and covering the lunchtime under the extended free entitlement.

One of five parents interviewed in the parents survey work shift work and one in eight work at weekends. This was particularly evident in the rural parts of Devon. However the need for childcare at these times has not been identified as an issue by parents.

Age gaps

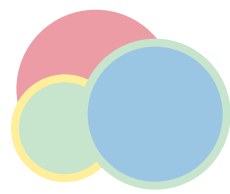
Devon has a wide-range of childcare across the pre-school and primary age groups. There is a mix of home-based and group-based childcare on school and community sites, as well as in the private sector. Childcare places have increased across all age groups since the last Childcare Sufficiency Assessment, but particularly in the primary age group for before school care. Many of these developments are on school sites. This age group was an identified gap in the last Childcare Sufficiency Assessment and this led to a high level of investment in time and available funding by the Early Years and Childcare Service to fill the gap. A small proportion of parents of secondary age children use formal childcare and they are happy with their current childcare arrangements which meets their needs.



Gaps in knowledge

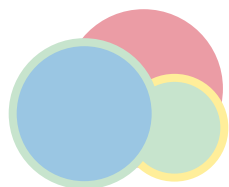
Although the analysis of supply and demand for childcare in this Childcare Sufficiency Assessment has been comprehensive, there are a number of gaps in knowledge that needs further investigation in the coming year and will form part of the action plan.

- The impact of travel to work areas where there is a high level of commuting among parents. Areas highlighted as needing further investigation are in the pre-school sector for Exeter, Barnstaple, Newton Abbot and some of the smaller market towns such as Sidmouth, Totnes, Tavistock and Okehampton where there is substantial movement of parents.
- A greater understanding of the level of provision for 2 year old children, particularly in the more disadvantaged communities of Devon as the 2 year old free entitlement is extended and rolled out across Devon.
- The potential demand for new childcare places where there are significant new housing developments, such as the two new towns of Cranbrook in East Devon and Sherford in the South Hams and other locations where significant housing development is planned.



Appendix 1 - Childcare settings by Learning Community

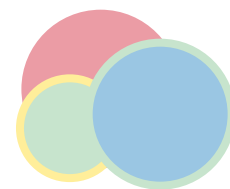
	Childminders	Home childcarers	Maintained School Nursery Class	Private Day Nurseries	Private Nursery Schools	Nursery Units of Independent Schools	Pre-Schools	Before School Clubs	After School Clubs	Before and After School Clubs	Holiday Play Schemes	All-year-round clubs
Axe Valley	15	4	0	2	0	0	12	1	0	3	2	2
Barnstaple	51	2	6	8	0	0	12	1	1	6	5	5
Bideford	55	2	4	2	0	1	7	0	1	0	2	2
Braunton	16	2	0	2	2	0	7	0	0	0	0	2
Chulmleigh	13	0	0	1	0	0	8	0	0	1	0	1
Clyst Vale	12	5	0	5	0	0	7	1	2	2	3	1
Crediton	19	2	0	2	1	0	15	1	3	2	1	2
Culm Valley	35	4	0	2	1	0	11	2	0	3	1	1
Dartmouth	4	1	1	1	0	0	4	0	1	0	1	0
Dawlish	23	2	0	2	0	1	8	2	1	2	2	1
Exeter	87	8	14	19	2	4	17	2	8	8	8	9
Exmouth	59	6	4	6	0	2	10	6	4	0	3	2
Holsworthy	10	1	2	1	0	0	9	0	0	0	3	0
Honiton	20	1	2	3	0	0	6	0	0	2	2	0
Ilfracombe	14	4	1	5	0	0	7	0	1	0	0	1
Ivybridge	33	5	0	5	1	0	13	3	3	4	3	3
Kingsbridge	19	5	0	1	0	0	13	2	0	0	1	2
Newton Abbot	37	2	5	6	0	0	10	1	2	6	4	0
Okehampton	27	1	1	2	1	0	10	1	1	0	2	2
Ottery St Mary	22	0	0	1	0	0	7	0	0	0	2	2
Sidmouth	12	0	0	3	0	1	5	1	1	1	1	1
South Dartmoor	46	5	1	3	1	1	10	2	2	1	3	0
South Molton	12	2	0	3	0	1	7	0	2	0	2	0
Tavistock	38	3	1	7	0	2	16	2	3	3	5	2
Teign Valley	33	3	1	3	0	0	11	1	0	1	1	1
Teignmouth	10	2	2	3	0	0	4	0	1	0	2	1
Tiverton	24	2	5	6	0	1	5	1	1	2	1	4
Torrington	16	1	4	1	0	1	7	1	2	1	0	1
Totnes	21	8	1	4	1	2	8	1	1	0	5	1
Devon (March 2010)	783	83	55	109	10	17	266	32	41	48	65	49



Appendix 2 - Levels of provision by Learning Community

	Primary Schools	Under 3 year olds	3 to 4½ year olds		Primary School Age		
		Full Daycare	Term-time	Holiday	Before	After	Holiday
Axe Valley	13	14.6%	35.9%	17.1%	9.5%	8.5%	9.7%
Barnstaple	14	16.2%	52.2%	34.4%	10.5%	10.8%	9.0%
Bideford	10	14.8%	39.9%	16.3%	6.3%	8.1%	9.0%
Braunton	5	22.4%	39.2%	32.7%	5.7%	7.3%	7.3%
Chulmleigh	10	14.1%	73.4%	26.7%	7.7%	7.7%	5.9%
Clyst Vale	8	66.9%	108.4%	75.8%	7.7%	11.4%	12.2%
Crediton	13	17.4%	47.9%	23.0%	8.8%	12.9%	9.6%
Culm Valley	14	10.7%	67.1%	14.4%	9.3%	7.8%	6.8%
Dartmouth	4	16.8%	42.6%	16.7%	2.2%	6.2%	11.2%
Dawlish	7	19.2%	84.8%	25.4%	8.3%	9.8%	8.9%
Exeter	21	18.2%	71.8%	38.1%	6.9%	10.7%	11.3%
Exmouth	13	16.3%	71.2%	27.3%	8.3%	7.8%	10.3%
Holsworthy	14	13.2%	43.9%	13.9%	2.0%	2.0%	8.0%
Honiton	8	9.8%	67.5%	34.5%	7.2%	7.2%	10.7%
Ilfracombe	8	14.8%	64.8%	33.6%	3.2%	5.1%	4.1%
Ivybridge	14	21.9%	76.7%	35.4%	12.0%	13.1%	11.3%
Kingsbridge	10	18.0%	96.3%	14.4%	8.8%	7.8%	9.7%
Newton Abbot	12	18.2%	53.8%	30.7%	7.6%	8.9%	7.9%
Okehampton	11	14.1%	48.8%	22.5%	6.8%	10.2%	9.1%
Ottery St Mary	5	21.4%	51.9%	23.3%	5.6%	7.4%	10.0%
Sidmouth	5	27.7%	138.0%	73.3%	5.4%	8.5%	9.3%
South Dartmoor	8	21.4%	58.8%	31.6%	9.0%	9.5%	10.1%
South Molton	9	26.6%	68.9%	44.6%	2.6%	6.0%	12.8%
Tavistock	14	27.0%	73.2%	35.7%	6.8%	8.9%	8.9%
Teign Valley	8	18.1%	61.7%	27.1%	8.2%	7.3%	8.7%
Teignmouth	5	21.1%	57.0%	30.5%	2.0%	8.6%	7.2%
Tiverton	10	17.7%	62.4%	25.7%	7.7%	9.1%	7.8%
Torrington	10	17.3%	68.9%	13.8%	6.8%	10.3%	5.6%
Totnes	11	25.9%	104.5%	38.1%	4.6%	6.4%	11.9%
DEVON 2010	294	18.7%	65.3%	30.6%	7.3%	9.0%	9.3%
Number of Learning Communities below provision levels March 2010		19	0	10	14	5	4
Number of Learning Communities below provision levels March 2007		22	1	15	22	11	9

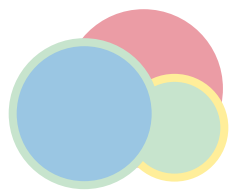
Source: Early Years and Childcare Service Annual Childcare Audit 2010



Appendix 3 - Number of childcare places available by age group

Learning Community	Primary schools	Under 3 year olds	3 to 4½ year olds		Primary school age		
		Full daycare	Term time	Holiday	Before	After	Holiday
Axe Valley	13	41	467	49	161	145	164
Barnstaple	14	171	364	135	365	377	315
Bideford	10	76	180	89	163	209	231
Braunton	5	32	353	62	57	73	73
Chulmleigh	10	89	194	488	69	69	29
Clyst Vale	8	108	310	179	78	117	124
Crediton	13	67	213	92	161	237	176
Culm Valley	14	132	216	72	218	182	158
Dartmouth	4	70	131	111	13	37	67
Dawlish	7	69	234	135	131	153	139
Exeter	21	220	125	240	747	1134	655
Exmouth	13	116	185	87	284	265	350
Holsworthy	14	95	82	65	21	21	83
Honiton	8	109	187	53	90	90	134
Ilfracombe	8	44	155	26	52	83	67
Ivybridge	14	106	361	111	295	321	278
Kingsbridge	10	88	78	81	106	94	118
Newton Abbot	12	76	327	25	222	258	230
Okehampton	11	129	156	22	112	168	150
Ottery St Mary	5	204	289	70	64	84	114
Sidmouth	5	156	125	163	55	87	95
South Dartmoor	8	718	103	29	170	180	190
South Molton	9	200	98	177	24	56	120
Tavistock	14	81	335	72	181	237	235
Teign Valley	8	165	214	116	141	125	149
Teignmouth	5	249	56	361	29	125	105
Tiverton	10	220	193	82	187	222	191
Torrington	10	91	209	83	80	122	66
Totnes	11	44	940	122	88	122	226
Devon 2010	294	3966	6880	3397	4364	5393	5032
Devon 2007	294	3776	5823	2924	3613	4816	5305

Source: Early Years and Childcare Service Annual Childcare Audit 2010

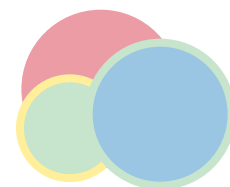


Appendix 4 - Summary of changes in childcare provision by locality

This table shows:

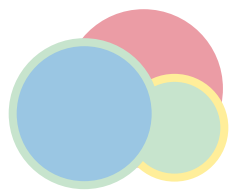
- the current breakdown of available childcare places between home-based and group-based care
- the change in number of available places and hours of childcare provided since March 2007.

Age group		Locality	Number of places in March 2010	% of places available that are home-based	% of places available that are group-based	Change in number of available places since 2007	Change in hours provided since 2007
Under 3 year olds	All year	DEVON	3,966	32.9%	67.1%	190	11,868
		Eastern Devon	855	34.2%	65.8%	128	1,720
		Northern Devon	854	37.0%	63.0%	48	4,111
		Southern Devon	2,257	30.8%	69.2%	14	6,036
3 to 4 1/2 Year Olds	Term Time	DEVON	6,880	13.6%	86.4%	1,057	64,454
		Eastern Devon	2,662	15.3%	84.7%	701	42,657
		Northern Devon	1,500	12.1%	87.9%	266	14,535
		Southern Devon	2,718	12.8%	87.2%	90	7,264
	Holidays	DEVON	3,397	27.5%	72.5%	473	27,246
		Eastern Devon	1,412	27.1%	72.9%	33	12,197
		Northern Devon	688	30.1%	69.9%	101	7,071
		Southern Devon	1,297	26.7%	73.3%	339	7,978
Primary School Age	Term Time	DEVON	9,757	41.5%	58.5%	1,328	7,120
		Eastern Devon	3,015	35.4%	64.6%	1,084	7,094
		Northern Devon	4,083	48.6%	51.4%	57	1,741
		Southern Devon	2,659	46.0%	54.0%	187	-1,714
	Holidays	DEVON	5,032	39.8%	60.2%	-273	256,809
		Eastern Devon	1,476	37.3%	62.7%	-509	81,374
		Northern Devon	1,915	45.0%	55.0%	-57	36,908
		Southern Devon	1,641	40.0%	60.0%	293	138,527



Appendix 5 - Early years places available by Learning Community autumn 2009

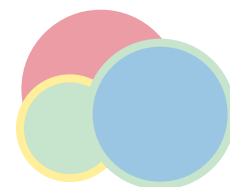
Learning Community	Number of 3/4year olds requiring a place	Number of Funded Settings	Early Years Places Available	Level of Early Years Places
Axe Valley	272	16	406	149.30%
Barnstaple	668	30	916	137.10%
Beacon	710	19	722	101.70%
Bideford	518	16	562	108.50%
Braunton	196	11	282	143.90%
Central & Chestnut	660	28	1170	177.30%
Chulmleigh	143	8	194	135.70%
Clyst Vale	187	12	394	210.70%
Crediton	352	14	498	141.50%
Culm Valley	449	15	480	106.90%
Dartmouth	128	5	148	115.60%
Dawlish	289	12	394	136.30%
Exmouth	642	23	804	125.20%
Holsworthy	190	12	280	147.40%
Honiton	246	12	368	149.60%
Ilfracombe	341	13	376	110.30%
Ivybridge	438	24	808	184.50%
Kingsbridge	198	12	398	201.00%
Newton Abbot	582	20	714	122.70%
Okehampton	284	16	406	143.00%
Ottery St Mary	157	9	284	180.90%
Sidmouth	157	9	298	189.80%
South Dartmoor	365	17	456	124.90%
South Molton	173	11	260	150.30%
Tavistock	489	25	702	143.60%
Teign Valley	295	14	344	116.60%
Teignmouth	284	11	320	112.70%
Tiverton	493	19	678	137.50%
Torrington	205	15	312	152.20%
Totnes	308	16	560	181.80%
West Exe	568	13	574	101.10%
DEVON Autumn 2009	11032	477	15108	136.90%



Appendix 6 - Percentage of children living in poverty by ward – highest 20 (2007)

Ward	District	Number of children aged under 16 in poverty	% of children aged under 16 in poverty	Rank in Devon
St David's	Exeter	150	31.6%	1
Ilfracombe Central	North Devon	270	31.0%	2
Forches and Whiddon Valley	North Devon	375	30.8%	3
Priory	Exeter	615	30.7%	4
Teignmouth West	Teignbridge	330	29.3%	5
Lydford	West Devon	75	28.6%	6
Mincinglake	Exeter	310	27.1%	7
Dartmouth Townstal	South Hams	150	26.9%	8
Yeo Valley	North Devon	260	26.8%	9
Central Town	North Devon	210	26.0%	10
Bideford East	Torrige	270	25.5%	11
Totnes Bridgetown	South Hams	160	24.1%	12
Bideford South	Torrige	265	23.3%	13
Exwick	Exeter	445	23.1%	14
Exmouth Littleham	East Devon	215	22.6%	15
Newtown	Exeter	105	22.4%	16
Totnes Town	South Hams	165	22.3%	17
Buckland and Milber	Teignbridge	280	22.2%	18
Lowman	Mid Devon	335	21.6%	19
Bere Ferrers	West Devon	105	21.6%	20

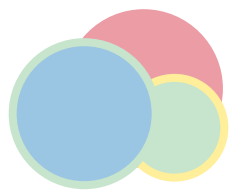
Source: Department for Work and Pensions, 2010



Appendix 7 - Children dependent on workless benefits April 2007

Learning Communities	Total 0-15s	Number of Children 0-15 living in benefits households	% of Children 0-15 benefits dependant
Axe Valley	3,828	360	9.40%
Barnstaple	8,203	1,285	15.70%
Bideford	5,347	880	16.50%
Braunton	2,617	195	7.50%
Chulmleigh	2,299	185	8.00%
Clyst Vale	2,849	225	7.90%
Crediton	4,394	335	7.60%
Culm Valley	4,105	430	10.50%
Dartmouth	1,558	215	13.80%
Dawlish	3,605	415	11.50%
Exeter Beacon	6,803	1,110	16.30%
Chestnut	5,597	970	17.30%
Exeter West Exe	5,832	920	15.80%
Exmouth	7,168	805	11.20%
Holsworthy	2,129	200	9.40%
Honiton	2,835	350	12.30%
Ilfracombe	2,904	575	19.80%
Ivybridge	6,419	550	8.60%
Kingsbridge	2,463	270	11.00%
Newton Abbot	6,880	970	14.10%
Okehampton	3,895	460	11.80%
Ottery St Mary	3,091	220	7.10%
Sidmouth	2,518	235	9.30%
South Dartmoor	4,282	475	11.10%
South Molton	1,220	140	11.50%
Tavistock	4,134	395	9.60%
Teign Valley	3,280	365	11.10%
Teignmouth	3,147	490	15.60%
Tiverton	5,956	770	12.90%
Torrington	2,811	310	11.00%
Totnes	2,815	430	15.30%
Devon County Council	124,984	15,535	12.40%
ENGLAND	9,686,396	1,908,220	19.70%

Source: DWP April 2007, Devon PCT November 2007

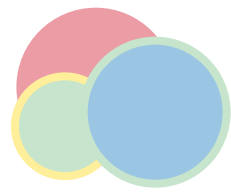


Appendix 8 - Number of children in families receiving benefits

Area	Number of children in families in receipt of CTC (<60% median income) or IS/JSA		% of children in poverty	
	Aged under 16	Dependent children under 20	Aged under 16	Dependent children under 20
East Devon	2,510	2,830	12.3%	11.9%
West Devon	1,140	1,280	13.2%	12.5%
Mid Devon	1,915	2,155	13.6%	13.2%
South Hams	1,935	2,240	14.0%	13.5%
Teignbridge	3,120	3,520	14.7%	14.2%
North Devon	2,865	3,210	17.3%	16.5%
Torridge	1,865	2,120	17.5%	16.9%
Exeter	3,305	3,650	18.6%	17.8%
Devon	18,645	21,005	15.2%	14.5%
South West	151,785	169,460	16.9%	16.1%
England	2,141,690	2,397,645	22.4%	21.6%

Source: Department for Work and Pensions, 2010

Acknowledgements



We would like to thank the following groups for their help with the consultation work carried out for this assessment.

- Parents, children and young people and employers who took part in our surveys
- Schools
- Childcare providers
- Devon Youth Service
- Children's centres



Devon County Council Early Years and Childcare Service March 2011

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or phone **0800 056 36 66**