



# Devon Childcare Sufficiency Assessment Summary

**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 sectors of the market to provide sufficient, sustainable and flexible childcare that is responsive to parent's needs.*

Section 11 of The Childcare Act gave local authorities a duty to undertake a [Childcare Sufficiency Assessment](#) every three years. Our first Childcare Sufficiency 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 this strategy, and through implementing action plans at local level, there has been significant development in providing new childcare places to fill gaps, and, also improvements in quality, skills and training.

The provision of 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 the development of childcare places on school sites, particularly breakfast clubs, but also to develop links with 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 affected the demand for childcare and also the sustaining of childcare providers operating in the childcare market. It is in the context of all these changes that our second Childcare Sufficiency Assessment has been created.

The Assessment includes:

- the demand for childcare
- the supply of childcare
- the analysis of the gap between demand and supply at sub-local authority level, for Devon this is Learning Community Level; also used in the first Assessment.

Embedded in the Assessment are the factors that drive the demand for childcare, which include the demographics for Devon. Parents, childcare providers, schools, children's centres, employers, children and young people have all given their views on the provision of childcare in Devon.

The Assessment looks at the **level of provision** by each type of childcare and other factors which are relevant to deciding **whether childcare is suitable and sustainable**, such as Ofsted inspection reports, quality assessments and the skills of the workforce.

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



# Stakeholders

## **Parents of children aged 0-19 years**

A comprehensive telephone survey was conducted by the research organisation Hemsall's Consultancy on the views of parents on childcare in Devon. Some 1,750 parent and carers of children aged 0-14 years (up to 18 years for children with disabilities) were contacted in this way. An additional face to face interviewer-led survey of 250 parent and carers in targeted locations across the county was done with specific groups of parents.

A more qualitative approach to research was undertaken to seek the views and experiences of parents of children who have additional needs, or parents who tend not to have their voice heard. This looked at what barriers exist to the take-up of childcare and whether what is currently available meets their needs. A further 95 parents were consulted through this method. Additionally 66 parents of children at Devon's 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**

During February and March 2010 a questionnaire was completed with schools, children's centres and early years settings. In addition a more qualitative approach was used to find out childcare providers' views through provider network meetings.

## **Children and young people**

Children and young people were consulted about their views on childcare through schools and childcare settings through questionnaires and more informal discussions.

The Early Years and Childcare Service worked with the Participation and Democracy Development Team to conduct face to face consultations, asking children about their experiences. A range of types of settings took part at a variety of locations during May and June 2010. In October and November 2009, a consultation was carried out with pupils of Devon's special schools using appropriate discussion events and games, with assistance and input from the children's teachers and other specialist staff.

A total of 601 children were consulted throughout the process covering an age range from 3 to 17 years. 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 special schools.

## **Employers**

The Market Research Group based at Bournemouth University was commissioned to undertake a study of the views of employers in Devon. In total, respondents from 55 organisations participated.

# Information on Devon

## Population

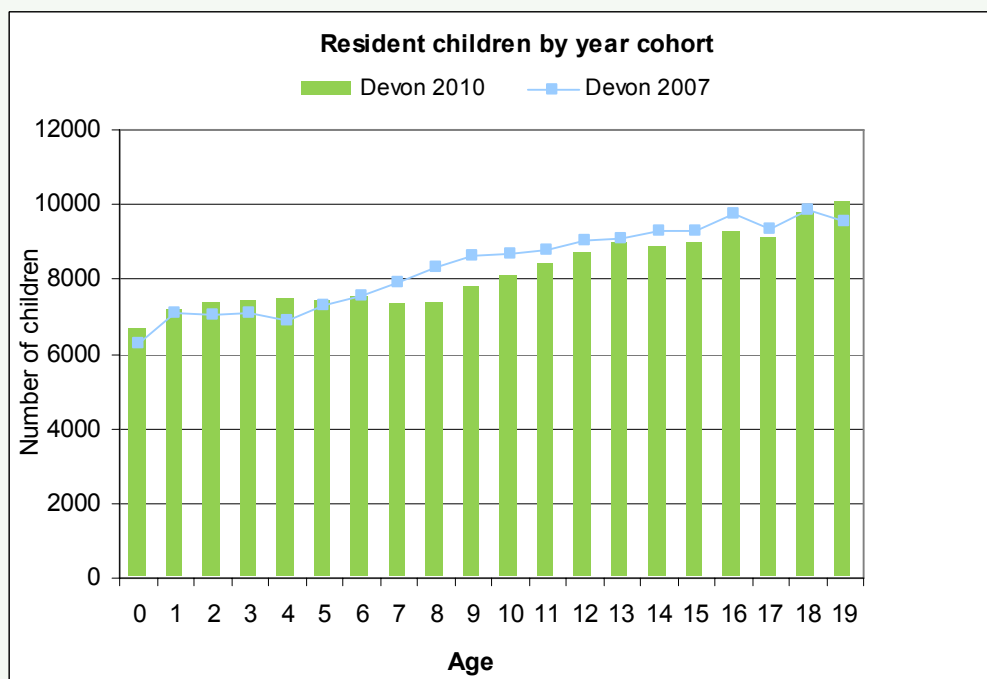
In 2009 the total population of Devon was 771,871, a rise of just under 4% since 2007.

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 older<sup>1</sup>. The average age<sup>2</sup> of someone living in Devon is 43.0 years compared to 39.3 years for the UK as a whole.

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 is 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.

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 but also due migration in to Devon. The largest number of people moving to Devon are middle aged who bring their children with them.

### Chart 1: Resident population of children at June 2010



Source: South Devon Health Informatics Service (FHSA)

This chart also shows the detail by age cohort of the number of resident population under the age of 20 years across Devon. This 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.

In 2010 there has been a slight increase in the number of births (4%) with the highest levels seen in the last five years.

<sup>1</sup> ONS - Mid year population estimates 2008  
<sup>2</sup> Average age 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.



## Deprivation statistics

The indices of deprivation are the Government's standard measure of deprivation at a local level. 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 score of 149 represents 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, particularly in rural Devon.

Devon has five Lower Super Output Areas (LSOAs) that fall within the 10% most deprived in England. Three of these LSOAs are in Exeter and two are in North Devon. The LSOA that has the lowest rank in Devon of 1657 can be found in Ilfracombe Central in North Devon.

At the other end of the scale Devon has two LSOAs that 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 deprivation 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.

## Children living in poverty<sup>3</sup>

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 be out of work; continuing the poverty cycle.

All local authorities are required to address child poverty and develop a Child Poverty Strategy.

There are various ways of measuring child poverty. We have included three here.

## Income Deprivation Affecting Children Index (IDACI)

IDACI shows the percentage of children aged 0-15 years in each LSOA which live in families that are income deprived. Income Deprivation is defined as households receiving Income Support, Income based Jobseeker's Allowance or Pension Credit, or those receiving Working Tax Credits or Child Tax Credits 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.

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

<sup>3</sup> Extract from Child Poverty Needs Assessment, Devon County Council, 2010

## National Indicator NI 116: Proportion of Children in Poverty

The percentage of Children in Poverty (the national indicator NI116) is calculated by the number of children living in families receiving Child Tax Credit whose reported income is less than 60% of the median income, or receiving Income Support or Income Based Job Seekers Allowance, divided by the total number of children in the area (determined by Child Benefit data).

In Devon 18,645 children (15.2%) under the age of 16 are considered to be living in poverty using this indicator (Department for Work and Pensions 2010).

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

There were 10,334 (10.8%) Devon pupils eligible for free school meals in January 2010 an increase of 0.8% from January 2009. Free school meals have been used as a proxy measure for identifying deprivation in individual families. Take up of free school meals has increased in recent years due to an easier application process and the incentive to access the extended schools scheme.

## Devon's diverse economy<sup>4</sup>

Although Devon is predominantly rural, its character and economic structures are quite distinctive.

**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.

**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.

**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.

**North Devon** is a 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 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 7% above the average for the county as a whole.

**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.

**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.

<sup>4</sup> Extract from Devonomics, Devon County Council, 2010

**West Devon** is a 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.

### **Employment in Devon**

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%<sup>5</sup>, was 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 childcare responsibilities.

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

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. Agriculture contributes four times more to output than it does in the national economy. Devon is a major tourist destination attracting over 6 million staying visitors each 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 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.

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.

Devon County Council's duty 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 as 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:

- work completed with Devon Welfare Rights Unit
- the general promotion of Childcare Tax Credits
- 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.

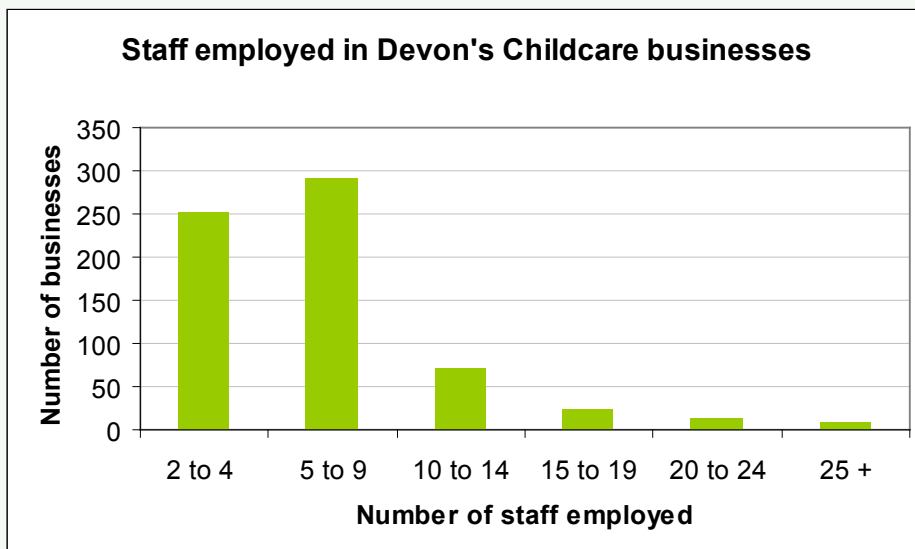
Childcare businesses also contribute to the growing economy and employment of Devon's working population.

The early years workforce has approximately 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 of 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.

Childcare providers were asked about the impact of the recession in 2009-10. A large proportion reported that there had been no impact to their business which was due to reasons such as careful management, a continued high demand for childcare or mainly taking funded children. The increase to 15 hours of funded provision had actually helped their business during that time.

## Chart 2: Staff employed in childcare businesses

- \* data missing from 87 childcare businesses
- \* excludes single operating childminders and home childcarers



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

Out of the 61 providers who said they had lost children over the past year, 35 specifically reported that this was due to the fact that parents had lost their jobs, been made redundant or had their hours reduced. Other providers reported that parents were choosing to give up work to look after their children as it is a cheaper option.

Due to job loss and the general impact of the recession on family budgets, providers reported that parents were struggling to pay bills and were getting into debt. Providers were having to chase payments which affects their cash flow. Some providers report having to stop sessions and cut back on resources. A few providers reported they had considered ceasing their provision due to the recession.

Conversely 24 providers reported that the recession in 2009-10 had had a positive affect on their business. Numbers of children increased as financial pressures to increase household income meant both parents needed to work.

## **Childcare and work – employers' views**

Fifty-five employers participated in the consultation of which 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 that were part-time than the smaller employers. For 40% of the organisations, at least half of their workforce were female while approx 20% had at least 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 have policies and benefits in place which go beyond the statutory obligations towards their staff in this area.

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, and holiday and after school provision.

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

All the organisations interviewed encouraged a formal or informal flexible working structure within the operational constraints of their business. For working parents flexible working patterns reduce the need to find alternative childcare provision. Flexible working arrangements are likely to be an area for innovation and expansion in the future; given that 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.

Organisations expressed a difficulty in getting information about what other sources of advice and information exist. They were not aware of Devon County Council's Family Information Service, DISC. This suggests 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.

## **Workless households**

In Devon about 12% of children aged 0-15 years were living in workless households in 2007 compare to 19% nationally. Two-thirds of all children aged 0-15 years 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.

The Learning Communities in Devon 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%).

## **Childcare and work – parents' views**

Of the parents and carers interviewed by Hemsall's, 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.

Overall, a high proportion of respondents were working (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 those 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.

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

**Chart 3: Patterns of work (respondent and partner) in a normal working week**

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, Hempsall's March 2010**  
**Base 1,852: percentages rounded. Multiple responses**

Use of childcare was analysed for working and workless households - a workless household being defined as one where there are no adults of working age in paid employment. 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 the age group of the child, with the highest proportion for the very young and primary aged children. The pattern of use by age differs from the national survey of childcare which showed a distinct decline of use of childcare 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.

**Table 1: Proportion of families using childcare for economic purposes**

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

### **Awareness of Working Tax Credits**

Respondents using childcare were asked if they received any support with the cost. Child Tax Credit was the most commonly cited support, followed by Working Tax Credit, the childcare element of Working Tax Credit and the free early years entitlement.

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) were receiving the childcare element of WTC.

Adjusting for households with an annual income 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 regarding different elements of the Tax Credits system.



### **Income maximisation project**

In spring 2010, the Early Years and Childcare Service commissioned Devon Welfare Rights Unit - part of Citizen's Advice Bureau - to complete some work to increase the take-up of benefits and, in particular the number of working families benefiting from the childcare element of the Working Tax Credit (WTC) as a percentage of the number of working families receiving more than the family element of Child Tax Credit (CTC) (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. 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 CTC 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 for low income families to lift families and children out of poverty.

The target of increasing take-up of Working Tax Credit and the childcare element of Working Tax Credit will be evaluated by reference to figures produced annually by HMRC. Figures for 2009/10 are due to be published in May 2011.

## Housing

There are over 340,000 dwellings in total in Devon<sup>6</sup>. The vast majority of these (89%) are in the private sector, either through owner occupation and second homes or in the private rented sector.

The remainder of the housing stock consists of:

- Registered Social Landlord housing (7%)
- Devon County Council owned stock (4%)
- other Public Sector housing (0.2%).

By comparison, England has higher proportions of local authority owned stock, (8%) Registered Social Landlord owned stock (10%), and a lower proportion of private sector dwellings (82%) than Devon<sup>7</sup>.

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%).

There are two significant housing developments planned for Devon which are in various stages of the process. The Cranbrook new community comprising up to 2,900 planned homes will be located east of Exeter close to Exeter International Airport and the planned Skypark Business Park. 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 is for the provision of up to 5,500 new dwellings.

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 houses for Cullompton, South Dartmoor, Kingsteington, Okehampton and Honiton.

## Skills, education and training

In 2008, 27.7% of the Devon working age population was 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 Torrridge (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%, Torrridge again has the lowest proportions qualified to Level 3.

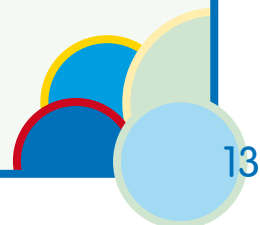
At the lower end of the skills spectrum 29.2% of Devon's population have not achieved a Level 2 qualification, generally considered the minimum for employability in anything other than elementary occupations.

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%.

Qualification levels for young people in Devon leaving school in 2009 were recorded as 51.8% of 15 year olds 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 Torrridge and North Devon districts. In 2008/09, only 47.7% of pupils in North Devon and 47.5% of pupils in schools in Torrridge achieved this level. These were well below the Devon and the national averages.

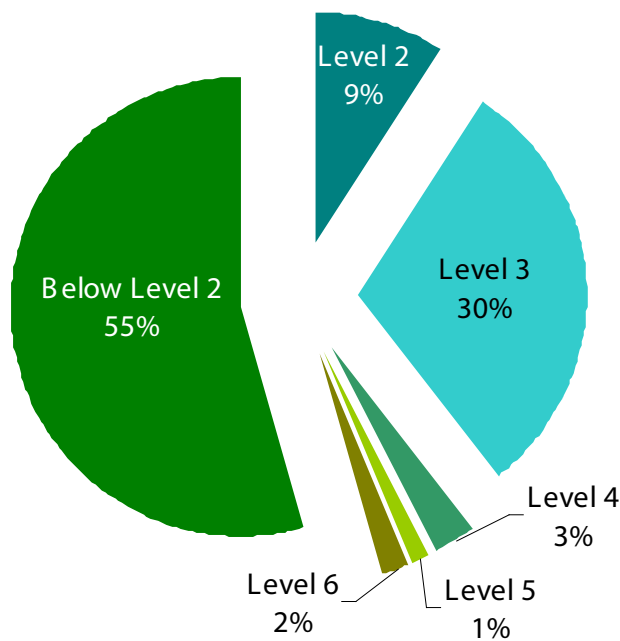
In the childcare sector, around 55% of staff working have not achieved a Level 2 qualification. For early years staff working in group providers this is 49%, but for home-based childminders this rises to 72%. This is very high compared to the 29.2% of Devon's population at the lower end of the skills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

<sup>6</sup> and <sup>7</sup> Communities and Local Government, Table 100 Dwelling Stock: Number of Dwellings by Tenure and district England; 2008/2009 (latest update: 25/02/2010)



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 4: Qualification levels of staff employed in Devon’s childcare businesses**



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

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 by providing training, learning and development opportunities. This supports their business plans and meet legislative requirements.

The implementation of 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 the development of 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 (CWDC) 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 also 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) prior to 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 were 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 the following 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 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 2:** 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
<b>Devon</b>	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 (PSE) and communication, language and literacy (CLL) 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 supply

## Childcare statistics

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 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. The highest number of home-based childminders was seen in 2006 (887); in March 2010 this number had decreased to 783 across Devon.

Overall the number of providers has increased, rising from 1516 providers across Devon in March 2007 to 1558 providers in March 2010. 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 since March 2007.

## Annual Childcare Audit 2010

The greatest change in provision type and numbers 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 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 in after school clubs becoming '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 which offer holiday care and term-time before and after school provision.

All levels of provision have increased since March 2007, except for provision for under three year olds which has decreased slightly as a result of a rise in the population of this age-group. The levels of term-time care which provides at least four hours of continuous care a day, particularly for 3 and 4 year old children, has increased significantly and this is seen as a result of many existing providers expanding the hours of care they offer.

## Childcare for children under three

Overall, there has been a steady increase in the number of childcare places for under threes and in 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.

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 both increased. Across Devon just over two-thirds of the hours of childcare provision available for under threes 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 threes Devon-wide has remained fairly stable providing just under one place for every five children.

## Childcare for children aged three to four and a half

The number of both places and hours of childcare available has increased for term-time daycare (at least four hours a day) for 3 to 4½ year olds over the last three years. 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 a day. The majority of childcare for this age group has remained group-based (86.4%) similar to March 2007.

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 that 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.

Although the level of provision during school holidays remains at half that seen during term-time, this provision has increased from just over one place for every four children to just under one place for every three 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 that in March 2007.

## Early Years Entitlement

This was introduced in summer term 2010. From the term after their third birthday until they start school, every child in Devon 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.

The take-up of the entitlement by 3 to 4½ year olds in relation to population is very high, over 98%, especially for four year olds. For three year

olds, take up is over 96%. Very few 3 to 4½ year olds do not access their free entitlement.

The take-up of hours for all funded four year olds is over 92% and for three year olds over 87%. In summer term 2009, Devon's added flexibility led to a noticeable increase in the take-up percentage for both 3 to 4½ year olds as the number of settings delivering the extended entitlement increased.

From summer term 2010, all settings were able to offer 15 hours funding each week for 3 to 4½ year olds. However, more than 1 in 5 pre-school playgroups (20.9%) were not able to open for 15 hours a week.

The estimated number of early years places available compared to population is based on the previous free entitlement of 12.5 hours per week. Based on this, analysis shows that every learning community in Devon has sufficient early years places. However, from summer term 2010, when settings were able to offer 15 funded hours per week, the number of available places decreased. We are currently getting opening hours information from settings to estimate the number of early years places available based on 15 funded hours each week.

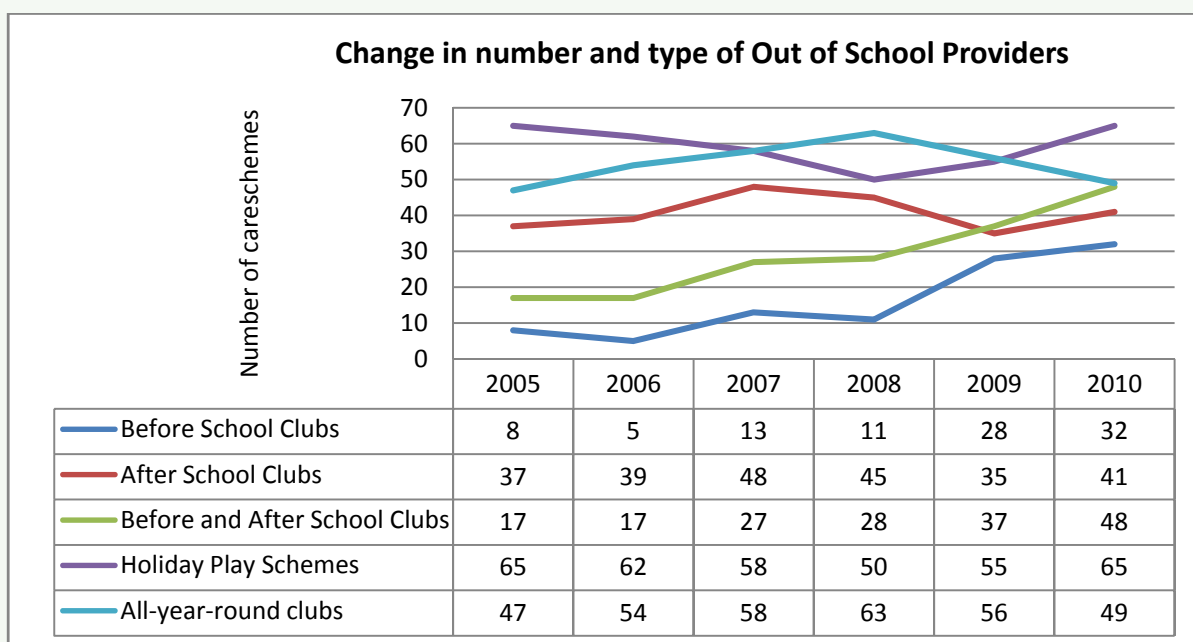
Devon currently operates a two term entry point into school. In September 2011, the single entry point will be introduced; this will mean that all four year olds will be able to start school in the autumn term after their fourth birthday. This will mean the number of four year olds needing an early years place will be reduced.

In some learning communities; there is an excess of supply - in Ivybridge and Kingsbridge attendance is less than 50% of the number of early years places available. In all of the learning communities in Devon, if every child accessing a setting took up their full entitlement, there would still be sufficient places.

## Childcare for school age children

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 active in this area, providing support through Sure Start Grants to aid the development of out of school provision.

**Chart 5: Changes in number and type of out of school provision**



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

Overall, there has been a total net increase of 751 before school places across Devon since March 2007. With a very 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 March 2007 with just under one place for every 18 children.

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). In March 2007, 10 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.

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 of new provision. 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 so increased risk of closure, of new groups set up in the more disadvantaged parts of Devon. Over half of these new funded groups closed, mostly within the three year funding period.

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 greatest increase in holiday places has been seen in Totnes (89 places), South Molton (66 places) and Okehampton (54 places). However, there are a number of Learning Communities showing a decrease in holiday places. In particular, Exeter has had an 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. The majority of holiday care has remained group-based (60%) which is slightly lower than that seen in March 2007 (64%).

Most formal childcare in Devon is provided for children aged up to 11 years, but both childminders and out of school providers will take 12 year olds if appropriate. Since 2007, we have worked closely with the Devon Youth Service to provide opportunities for childcare for this age group by opening Devon's 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 amount of students who travel home by bus limits the amount of after school provision that can be provided.

## Availability of childcare

Over three quarters of Devon's private day nurseries are now open between 8am to 6pm, five days a week, an increase since last year; while just under 60% of childminders offer at least 10 hours a day of childcare. The majority of childminders offering this provision (54.5%) cover at least 8am to 6pm every week day.

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.

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 three hours a day to just over 4½ a day. This is due to many pre-schools now offering lunch clubs so extending their opening hours to provide more than four hours of continuous childcare each day.



## Availability of childcare – parents' views

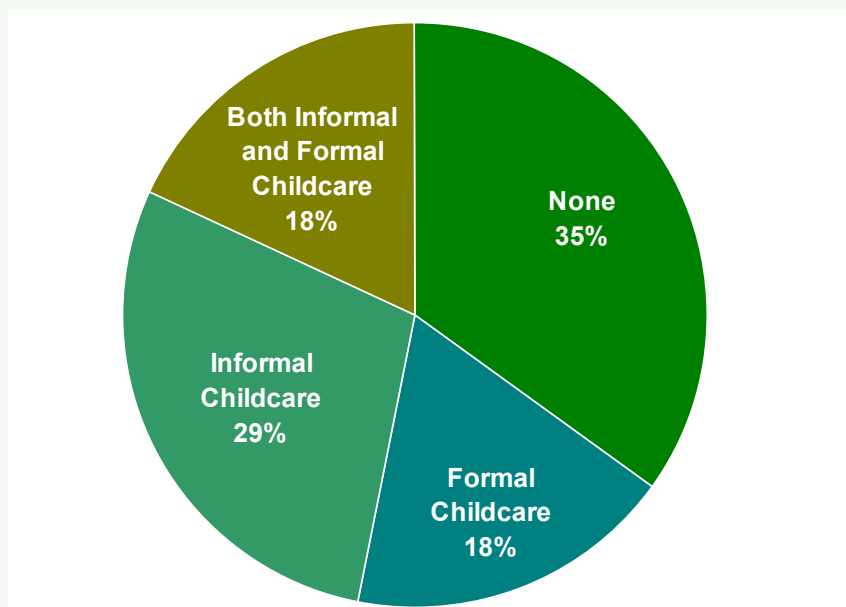
Hempsall's research shows that overall 39% of respondents (783) felt that there were enough childcare places in their local area. Just over a quarter of respondents (28%) were unable to offer an opinion. These findings are similar to those reported nationally, where 42% of parents thought that there were about the right number of childcare places in their local area. The majority (55%) of those that did offer an opinion felt there were enough childcare places.

The proportion of respondents reporting the number of childcare places locally as 'about right' has increased from 35% in 2008 to 39% in 2010.

While a third of respondents think 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. Parents with a disabled child or a child with additional needs, were more likely to report too few childcare places in their local area.

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.

### Chart 6: Use of childcare



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

A higher proportion of parents with younger children used childcare either informal or formal or a mixture of both. The use of formal childcare for parents with children aged 3-4 years old was particularly high compared to the average. This reflects the use of the free Early Years Entitlement.

The data from the survey suggested a relationship between use of childcare and household income. The lower the income the less likely a family will use formal childcare for their child. 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. Similarly, a much higher proportion of workless households did not use any form of childcare 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.

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 and/or informal) 95% (1,166 respondents) were satisfied with their childcare arrangements.

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. Extended families, in particular grandparents, play an important role in informal childcare arrangements during term time and during the school holidays. This was also highlighted in the consultation with children.

Respondents were asked the reasons why they did not access formal childcare. For the majority (49%, 627 respondents) one parent was always at home to care for the children. 38% (487 respondents) expressed a preference for looking after their children themselves and 23% expressed a preference for their children 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 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.

### **Availability of childcare – providers' views**

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

Of those that said there was not enough childcare the highest preference was for 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. In particular, they felt more childcare was needed between 3.30pm and 6pm to cover the period after school until parents and carers get home from work.

# Families in challenging circumstances

## Access to childcare for children with additional needs

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.

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. For primary aged children, 75% of holiday clubs have accessible premises and just under 60% of out of school clubs.

The majority of early years settings working with children under five years visited by workers from the Early Years Support Service were considered to have a wide range of resources and equipment for providing childcare for disabled children. Those settings with poorer facilities were often limited by the environment of their building, for example limited outdoor play space, while others needed to upgrade or replace some of their equipment. Settings said they did reflect on the specific needs of children when completing their risk assessments.

Almost 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 which included steps and stairs. For a smaller number the barrier was related to staff training and development, particularly ensuring this was up to date.

An analysis of training in caring for disabled children completed by staff working in childcare settings identified that childminders (34%), home childcarers (19%) and out of school

settings (47%) do not access as much training as early years group settings (over 90%) in caring for disabled children and also do not update it on a regular basis.


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.

## Access to childcare for disabled children – parent's and carers' views

One of the parent groups which was 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 these parents to better understand their childcare needs and any barriers that they might have to using childcare. A total of 343 parents were asked about their needs.

A smaller proportion of parents of a child with additional needs compared to parents overall were satisfied with their current childcare arrangements. They were more likely to report too few childcare places in their local area than all parents. 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).

A number of parents spoke of the difficulty of finding childcare for older disabled children, particularly those with behavioural and emotional problems. 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. The lack of provision for disabled children in rural areas was particularly noted.



Several parents mentioned they would like more childminding care for their disabled child. The smaller group size and home environment was thought to be more suitable.

The cost of childcare was seen by some parents as the main barrier to them using formal childcare. For some parents the lack of information about what is available and how you access provision or find out about special support was an issue.

Parents were asked about activities their children currently attend and why these activities were chosen. The major reasons were because their children enjoyed the activity or it gave them the opportunity to socialise. Only a small percentage, just over 10% said so parents could work or train.

A key finding for the desired location of the additional activities was the move away from activities based at school to other locations. Barriers to accessing the selected activity were related to staffing and facilities.

### **Access to childcare for black and ethnic minority families**

There has been an overall increase of 0.7% of school age children with English as an additional language since autumn 2008. Over a third of the children (37%) have Polish as their first language.

Overall, of those children with English as an additional language in Devon the greatest number of children with another first language is Polish (9.7%) followed by Arabic (4%) and then Filipino (3.4%) and Chinese (3.4%).

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 in Devon. This 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.

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 who have English an additional language. The ability of the childcare provider and child to communicate was of critical importance. Parents were also concerned about the prevalence of discrimination.

With many migrant workers in low-paid jobs, cost was also considered a factor. Clarification of the rules for using informal childcare was also needed.

Research completed in the take-up of the early years entitlement shows that for every single ethnic minority group, there was a higher proportion of non-attendance at early years settings than actual attendance. Asian children made up 2.7% of the total non attendance but only 0.6% of attendance, suggesting that children from a minority ethnic background are less likely to access their early years entitlement than children who are classified as White British.

## Childcare for Gypsy, Roma and Traveller (GRT) communities

A number of different travelling communities can be found across Devon. While they all share a history of travelling lifestyle, each has its own ethnic identity traditions, and 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 lifestyles. GRT children face many potential barriers, including little or disrupted access to schooling, through mobility and marginalised states.

The childcare views of parents from GRT communities was gathered in collaboration with the Traveller Achievement Team.

Trust was seen as the key factor in choosing childcare for these parents and the threat of racism was given by one parents 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.



## Childcare for parents with mental health conditions

Childcare views and experiences of parents with mental health conditions were gathered in collaboration with Be Involved Devon.

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

## Childcare for 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 this was particularly difficult with partners' away and no close family living near by.

Parents also spoke about how difficult it was for women to take up work when their partners in the forces may do shift work and are away for long periods.

# Paying for childcare

The changes seen in the average hourly costs for childcare in Devon have, on the whole, only been minor 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 during the last year and range from an average of £2.80 to £3.53 per hour.

Average rate per hour for early years groups varies slightly by the type of provider. For private day nurseries it is £3.50, voluntary pre-schools £2.80, nursery units of independent schools £3.19 and private nursery schools £3.53 per hour.

There is a wide variation in the range of hourly costs for childminders from £1.50 to £6 per hour with an average of £3.32.

Out of school provision in term time also shows a wide variability in the range of costs per hour from £1 to £6 per hour with an average of £2.83, holiday provision is less variable and has an average of £2.25 per hour. For out of school provision, home based childminding costs are higher than other group-based care with an average of £3 per hour.

## Parents', children's, providers' and employers' views

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

In contrast, a lower percentage of parents of disabled children and children with additional

needs were satisfied with the cost of their current childcare arrangements (80% compared to 85% overall).

A higher proportion of parents with a lower annual household income (less than £20,000) who were not using formal childcare at the time of the survey said they 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.

Cost was the main barrier for children who were asked their opinion to accessing their chosen provision, 40% of the children mentioned this.

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. In 2010 providers reported 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 is becoming unaffordable to some families.

For employers 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.

# Quality of childcare

For childcare to be 'sufficient' it must be of high quality to improve outcomes for children and young people.

## Ofsted outcomes

The current standard measure for the quality of childcare is the Ofsted inspection outcome which is made over a three year cycle.

One in five providers in Devon were awarded an Outstanding overall Ofsted outcome in 2010, as compared to the national outcome of one in every ten providers. The number of providers receiving overall Good or Outstanding outcomes (73%) was higher than the national outcomes (68%). 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.

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

In 2009, the Early Years and Childcare Service set up a new process using the ECERS measurement tool for identifying weak and good practice through a number of different routes to improve the quality of childcare. ECERS is a standardised measurement instrument of quality which has been used on many national research studies including the EPPE research programme.

The scale offers comprehensive statements or indicators which are used 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 overall average ECERS-R score across all early years settings in Devon is 4.7 out of 7. Results have shown a range from 2.9 to 6.3.



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

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.

## Views on childcare quality

In Hemsall's research two thirds of parents and carers reported that the quality of childcare provision was very or quite good. This compares to national figures\* where 64% of parents thought that provision in their area was either very or quite good.

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.

Nearly three quarters (73%) of providers think that the quality of childcare in their area is good or very good.

# Childcare gap analysis

The analysis of supply and demand for childcare in Devon in this 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 has filled the gaps highlighted in the 2008 Childcare Sufficiency Assessment.

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

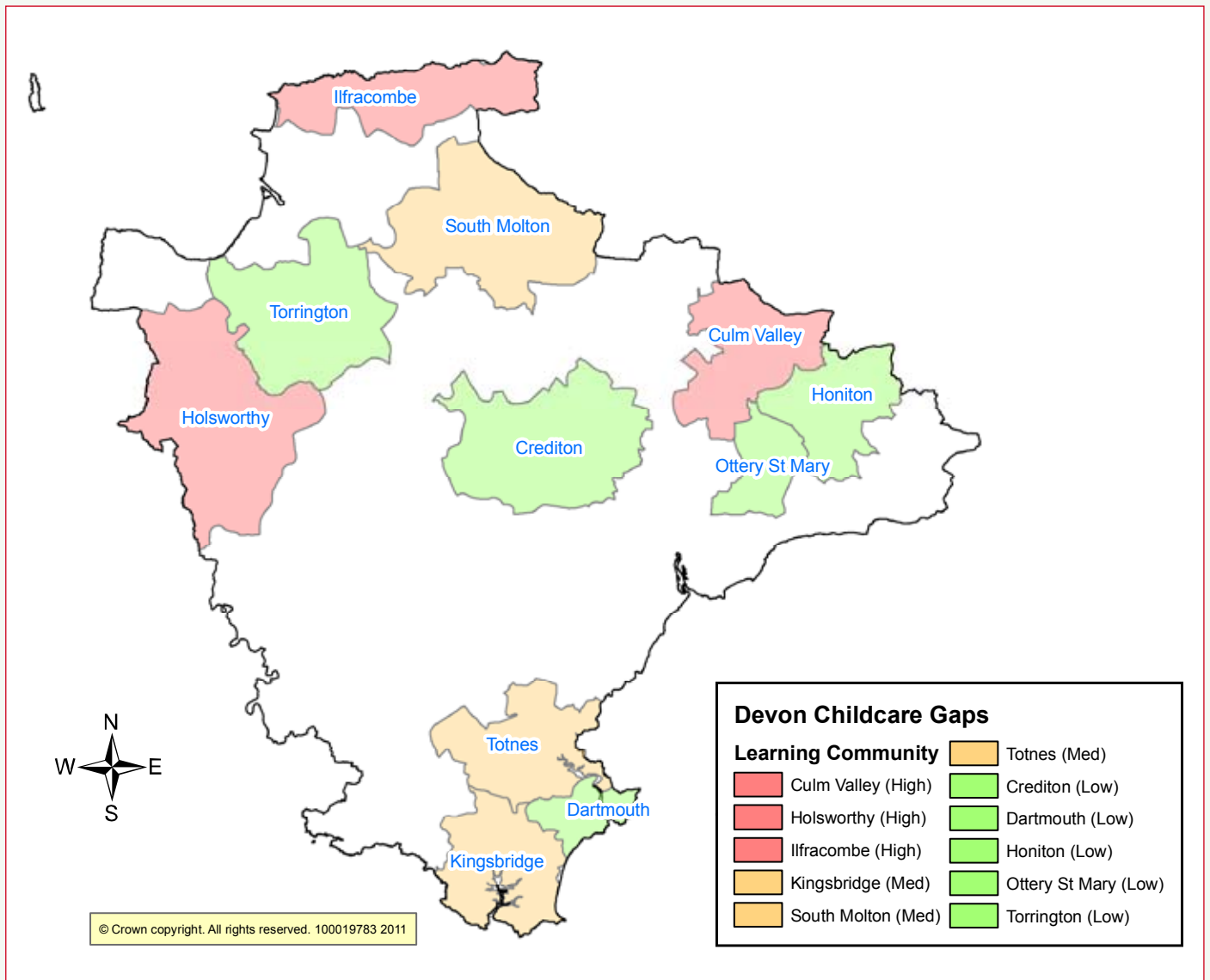
This summary analyses the supply and demand of childcare provision across Devon highlighting potential gaps in the local childcare provision with regards to:

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



<b>Crediton</b>	Analysis suggests there is a shortage of places for 3 to 4½ year olds (9 places during term-time).
<b>Culm Valley</b>	Analysis suggests there is a shortage of full daycare places for under 3 year olds (7 places) and of holiday places for 3 to 4½ 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 start school in the autumn term. Even allowing for a decrease in the number of four year olds requiring an early years place, there will still be a predicted shortfall of around 40 places in 2012. The shortfall of places is maintained because of an increase in the birth rate and planned housing development.
<b>Dartmouth</b>	Analysis suggest there is a small shortage of out of school provision for primary aged children (4 places).
<b>Holsworthy</b>	Analysis suggests there is a shortage of full daycare places for under 3 year olds (5 places) for 3 to 4½ year olds, (20 places during term-time and 7 places during holidays) and out of school provision for primary school aged children (32 places).
<b>Honiton</b>	Analysis suggests there is a shortage of full daycare places for under 3 year olds (11 places)
<b>Ilfracombe</b>	Analysis suggests there is a shortage of out of school provision (38 places) and holiday provision (17 places) for primary aged children.
<b>Kingsbridge</b>	Analysis suggests there is a shortage of places for 3 to 4½ year olds (16 places during holidays).
<b>Ottery St Mary</b>	Analysis suggests there is a small shortage of places for 3 to 4½ year olds (4 places during term-time) and out of school provision for primary aged children (7 places).
<b>South Molton</b>	Analysis suggest there is a shortage of out of school provision for primary aged children (26 places).
<b>Torrington</b>	Analysis suggests there is a shortage of places for 3 to 4½ year olds (10 places during holidays).
<b>Totnes</b>	Analysis suggests there is a shortage of out of school provision (16 places) for primary aged children.

The parents were asked 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, however, 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 and 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 on the availability of childcare
- skills and training in caring for disabled children for the childcare workforce, particularly childminders, home childcarers and staff from out of school settings
- 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.

## 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 of friends for childcare
- low take-up of the free early years entitlement by Black and Minority Ethnic children.

**Young parents** aged under 25 years 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 were identified as:

- 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 were identified as:

- lack of information on types of childcare and how they operate
- 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 was identified 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 often abroad. 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 and 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 just under two-thirds (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. For nearly one in five families (18%) not using formal childcare cost was identified as an issue. 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%).

However, 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 the Childcare Tax Credits. Employers and children also see cost as a barrier to the 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 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 low income. Torridge is the second to lowest income district in the UK. The low level of income impacts on 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, five 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 do 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 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 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 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 Assessment has been comprehensive, there are a number of gaps in knowledge which need 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 amongst parents. Areas highlighted as needing further investigation is 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 two-year old children, particularly in the more disadvantaged communities, as the two 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.

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- Devon Youth Service
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