Assessment of Childcare Sufficiency

Flintshire County Council

Contents

Introduction

Statutory Duty

The Childcare Act 2006 underpins the Welsh Assembly Government's childcare strategy "Childcare is for Children" and enshrines in law:

- Parents legitimate expectation of accessible high quality childcare for children and their families; and

- Local Authorities responsibilities for providing information to parents and prospective parents to support their parenting role.

The Childcare Act will achieve these aims through statutory duties that will build on Local Authorities' existing roles and responsibilities. In Wales it will:

- Place a duty giving Local Authorities the lead role in facilitating the childcare market to ensure it meets the needs of working parents; in particular those on low incomes, those with disabled children, or those who wish their child to attend Welsh medium provision.

- Ensure people have access to the full range of information they need as a parent.

The intention of the Act is to place a duty on Local Authorities in Wales to secure, as far as is reasonably practicable, sufficient childcare to meet the requirements of parents in their area who require childcare in order to train, to work, or to prepare for work. The Act provides the Assembly with powers to make regulations requiring Local Authorities in Wales to prepare assessments of childcare sufficiency in their areas.

This *Assessment of Childcare Sufficiency* executes Flintshire County Councils obligations under Section 26 the Childcare Act (2006). It Identifies gaps and makes recommendations that will meet the needs of parents so that the Authority can fulfil its childcare sufficiency duty as set out in section 22 of the Act.

Methodology

All of the information gathered for the Assessment has been analysed by area to present a picture of childcare supply and demand by sub-local authority area as proscribed by the Act.

Middle Layer Super Output Areas (MLSOA's) have been used as the geographical area of study. MLSOA's are groupings of lower layer areas used for collecting Census data and have an average population size in Flintshire of 7,429 people. One of the advantages of using MLSOA's is that they are much more similar in population size than electoral divisions (wards) making comparisons between areas less prone to error. In addition, MLSOA's are much less prone to change than wards enabling accurate updating of the Assessment to be carried out on a regular basis. There are 20 Middle Layer Super Output Areas (MLSOA) in Flintshire as shown below.

Figure 1: Flintshire County Middle Layer Super Output Areas

Flintshire Childcare Sufficiency Assessment 2014

During October 2013 and February 2014, a consultation exercise took place to establish the views of parents and carers in Flintshire regarding childcare. Through a mixture of focus groups and structured questionnaires, the views of parents (fathers, mothers and other carers in loco parentis) as to the availability and accessibility of childcare were sought.

An electronic survey was publicised to all parents of children in Flintshire via schools, through existing childcare provision,local press,County Council website and Twitter account,local employers and in a number of other locations where parents meet. Only 63 responses were received.

Face-to-face consultation took place through existing structures such as parent and toddler groups; integrated centres; family learning groups in schools; pre-schools; health clinics and other locations where parents were already meeting. A total of 43 parents in 6 groups across Flintshire were interviewed in person or by telephone. Parents in more deprived areas and in marginalised groups (such as parents of disabled children) were targeted to provide balance against the likelihood that fewer parents in these areas and groups would return surveys.

In addition, feedback gathered,throughout 2013-2014, from parents who access assistance with the costs of childcare, has also been incorporated.

Childcare providers were engaged through a telephone survey carried out September 2013 and December 2013. In total 31 registered childcare providers were interviewed as part of the assessment, representative across provision types and geographically across the authority.

Children and young people were engaged in consultation about their views of childcare within Flintshre.In August 2013 41 children and 11 members of staff from 4 holiday clubs attended a consultation day. A further 41 children in 7 holiday clubs were consulted during holiday club sessions.Between November 2013 and February 2014 35 children from 1 welsh after school childcare setting and 7 english settings were consulted on their views of childcare.The clubs were set in both rural and urban areas of Flintshire and representative of provision type and geographically spread across the county.

39 employers were consulted between September 2013 and December 2013.They ranged from small and medium enterprises to large multinational employers employing in excess of 5,000 staff and they were located across the county.

Children and Families in Flintshire

The number of children in the population is important in deciding how much childcare is likely to be needed to meet local demand. In Flintshire, the population of children set against all people, ranges from 16 per 100, to just over 20 per 100 people. Areas on Deeside have more children in the population compared with the more rural areas in the west of the County.

For the purposes of the Childcare Sufficiency Assessment, it is estimated that there are 26,719 children and young people Flintshire between the ages of 0 and 14 years along with disabled children aged 15 to 17 years of age.

While the population of Flintshire as a whole has increased from 148,629 in 2000 to 152,743 in 2011, the population of children fell from 30,732 to 26,719 between 2000 and 2011. This was a higher than average loss for a Welsh County. While there has been a small increase in the number of births in the County recently, the overall trend is downwards. By 2026 it is expected that there will be between 11% and 17% fewer children and young people living in the region than there were in 2001.

There is a small net gain in families coming to Flintshire from elsewhere in the UK, but more recently, a larger gain from children moving to the County from Eastern Europe. While migration is unlikely to place a significant additional burden on the childcare market, the way in which services are delivered and in particular, how information is delivered may need to be examined to meet the needs of migrant families.

The Flintshire Unitary Development Plan allows for nearly 500 new houses to be built each year in Flintshire up to 2015. While this scale of house building will probably not result in a significant increase in demand for childcare across Flintshire, where significant developments are taking place of a type likely to attract families with young children, discussions within the local authority are needed to ensure that the impact on the childcare market is assessed.

The population of Flintshire is overwhelmingly white, with less than 2% of residents recorded as being from a black or minority ethnic group.

Welsh is spoken by 13.2% of people in Flintshire compared to 19% across Wales. Welsh is used across most areas of the County by a significant

minority. In five areas of the County, Welsh is spoken by over a fifth of residents.

Family structures in Flintshire are slightly more traditional than the averages across Wales, with more families headed by married couples (63%). The proportion of families headed by a lone parent (20%) is less than the average for Wales. However, in areas that are more deprived, the proportion of children living in lone parent families is as high as 48%.

The number of lone parents is an important factor in childcare demand as they are less likely to be working when their children are younger but have greater need for childcare to support work once their children are in school.In Flintshire there are 4,466 lone parent households. In 35.6% of such households parents are in part-time employment and 29.2% are in full-time employment. 35.1% are not in employment.

Work and Family Incomes

Overall, economic activity levels in Flintshire are higher than is average in Wales with 72.7%in employment compared to 68.9% for Wales.

The overall level of unemployment and long-term unemployment rates are lower than the average for Wales and Great Britain. This should mean that demand for childcare in Flintshire should be high.

In 2012 15% of children in Flintshire were living in a household where no-one works. Of these, two-thirds live with a lone parent. New requirements for parents to seek work will have an impact on this figure and will increase the demand for affordable childcare for up to 1,000 lone parents moving into employment in Flintshire over the next two years. Childcare to meet this demand will need to be in the areas of highest deprivation, where there are currently a disproportionate number of lone parents. It is unlikely that the market will respond to this growth in demand and some intervention may be needed.

For working families, average earnings are higher in Flintshire than in Wales as a whole, but lower than the UK average. An average gross income for a two-parent family based on one partner working full time, and the other working part time would be £512.25 or £26,637 per annum. For a single, female parent, the average weekly wage for working full-time would be £420.

Around half of all families in Flintshire have moderate incomes of between £21,000 and £40,000 per annum, but a quarter have incomes that puts them below the UK poverty level of £16,500 per year.
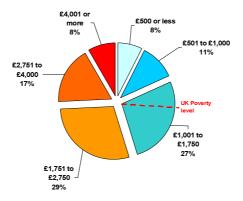
Figure 2:Monthly Income of Flintshire Families

For low and moderate income families, the Working Tax Credit should provide an income top-up and provide support to pay for 70% of childcare

costs. However, in Flintshire (as elsewhere in Wales) take-up rates are relatively low at 79.5% of families in work receiving Working Tax Credit compared to 74.7% across Wales. 20% of families do not claim their entitlement – particularly the childcare element. Some parents do not know that they are entitled to support, while others are put off by stories about overpayments and lots of form-filling.

Low take-up of tax credits is compounded by a perception amongst many parents that it does not provide enough support, so it's not worth working.

Overall <u>levels of deprivation</u> in Flintshire are low but there are a number of small areas of the County where many people experience multiple deprivation. These include parts of the Shotton Higher and Sealand in Garden City, Greenfield and Holywell Central*, Bagillt*, Mold West in *Mold* and Flint Castle. In these areas, childcare is likely to be needed to tackle child poverty, but is least likely to be sustainable in the short-term.

<u>More women work in Flintshire</u> than the average across Wales. As women take primary responsibility for childcare, this is likely to lead to a higher demand for services.

Childcare: Supply

The Childcare Act (2006), defines childcare for which the Sufficiency Assessment must take account, as that for which the childcare element of the Working Tax Credit is payable.

According to information held by Flintshire FIS there were 5235 childcare places in 260 settings for which the childcare element of the Working Tax Credit could be claimed in December 2013. Set against the population of children aged 0 to 14 (and to 17 with disabilities) there was one childcare place for every five children in the County. Compared with other local authorities, Flintshire had the fourth highest amount of childcare in Wales in relation to its population.

Childcare is not spread evenly across all areas of the County but there is not a direct link between the amount of childcare and levels of deprivation. In many areas of Wales, the market often fails in less affluent areas as the private sector sees little opportunity to sustain a profit-led business model. Some of the most deprived areas of Flintshire have the highest levels of childcare and the expansion of Flying Start is a significant contributor to the sustainability of early years childcare in such areas.

Early Years Childcare for children under 5 in Flintshire, is provided by childminders and day nurseries. Sessional care settings (pre-school playgroups and cylch meithrin that only operate for 2 ½ or 3 hour sessions) have not been included as on their own, they are not generally meeting the childcare needs of working parents as set out in the 2006 Childcare Act.
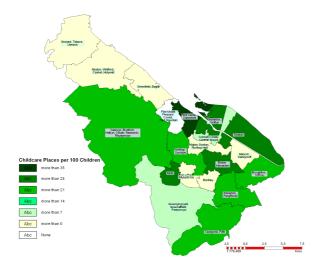
Figure 3: Early Years Childcare Places / 100 children aged 0 to 4

Across the County there were 1,472 places available for children under 5, in 29 group daycare settings and with 132 registered childminders. Set

against the population, there was <u>one early years childcare place for every six children</u> aged 0 to 4 years of age in 2013. Analysis by area shows no clear pattern to the spread of early years childcare in Flintshire with low levels of provision in some areas interspersed by areas with more. Neither is there any clear link between deprivation and a lack of early years childcare with some evidence that use of day nurseries, for example, in more deprived areas is higher than in more affluent communities.

The type of early years childcare is important in providing parents with a choice of setting between home-based care and group care. Childminders also often provide the only option for parents working unusual or flexible hours. In Flintshire, childminders provide a minimum level of daycare provision in most areas of the County, but in a number of areas there are none, or very few. In general, there are far fewer childminders across the northern part of the County.

<u>Childcare for babies</u> is limited with few vacancies with childminders or in day nurseries.

<u>Care for school aged children</u> in Flintshire is provided by out of school clubs, schools, some day nurseries and childminders. In total, there were 1,850 school aged childcare places in Flintshire in December 2013 providing <u>10 places per 100 children</u> in the population (aged 5 to 14). This compares with 6.7 places per 100 children across Wales. In 2013, Flintshire had the fourth highest amount of school aged childcare in Wales.

<u>Before school care</u> is mainly delivered in schools where it is estimated that 74 out of the 95 schools in Flintshire are served by either before-school childcare or a free breakfast club.

<u>After school care</u> in Flintshire is provided by 48 registered out of school settings, along with a small number of day nurseries and 132 childminders. The majority of care is delivered by out of school clubs attached to a particular school, but there are a small number of clubs and day nurseries that provide transport or 'walking buses' from more than one school.

There are 48 registered after school providers in Flintshire and of the 95 schools in the County, only <u>14 schools are located more than 1km away from an after school club</u>. However, while some schools may be served by a distant club providing transport, this is not generally a sustainable option and schools of any significant size should consider how they can meet the needs of their communities through developing after school care as part of the Out of School Childcare initiative. For small schools in rural

areas, sustaining an out of school club may not be possible. Here, close links with local childminders could provide parents with a coordinated service.

While most schools in Flintshire are served by an after school club, many parents said that there were not enough places available when they needed them in some clubs. Details of vacancies gathered through the provider's survey of indicated that after school clubs were reporting occupancy levels of 75%-100%. The vast majority of out of school care is focused on children of primary school age and many providers exclude older children as most clubs admissions policies make the intake exclusive to the school in which it is based. Only 8 after school clubs cater for children over the age of 11.

There were 19 separate settings recorded by Flintshire FIS providing holiday care to school aged children in 2008. They were run by a mixture of day nurseries, out of school clubs, schools and voluntary organisations. In addition, there two open-access playschemes registered with CSSIW. While this setting may be used by some parents as childcare, it is not included in the out of school holiday childcare figures.

There were 574 places recorded as being available in holiday schemes alongside 144 childminder places usually taken up by school aged children. This works out as 1 holiday place for every 33 children aged 5 to 14 years in Flintshire. The amount of holiday care is low across most of the County and not all settings are open across all school holidays.

Sessional care is daycare that is provided for a continuous period of less than four hours. It is used primarily to provide pre-school playgroup or cylch meithrin services to children aged 2 to 4 years of age, for sessions of 2 ½ to 3 hours at a time.

In Flintshire there were 43 sessional care providers in 2013. Together they were recorded as having 1,044 registered places between them. As some settings offer two sessions per day, a further 246 places could be added to this total. Eleven settings were recorded as providing an extended service that 'wraps around' the sessional place or a school nursery place to match the school day. In most cases, these places match the school day and operate only during term-time, yet they are likely to be meeting the needs of a number of working parents.

Flintshire has a good spread of sessional care provision with sessional or sessional and wrap-around services in all areas. Set against the population of 3 and 4 year old children in Flintshire, there were 46

sessional places available for every 100 children aged 3 and 4 years of age.

Along with 19 maintained schools, 37 sessional care providers and 19 day nurseries, 5 childminders provide free early education to 3 year old children, and in Flying Start target areas, free places for 2 year olds. The type of setting in which children receive their early education is important in providing working parents with a choice of sessional care; sessional care combined with other care such as a childminder; or an integrated package of care as provided by day nurseries and Playgroup Plus / Meithrin + settings.

Childcare provision for disabled children in Flintshire is provided by mainstream childcare settings along with two specialist holiday schemes operated in partnership by Action for Children and the specialist schools. While the majority of childcare providers said that they would make efforts to accommodate children with disabilities who wanted to use their services, in practice, it would seem from the evidence that disabled children are not taking up childcare places in proportion to their population.In order to address this concern a specialist post of Childcare Brokerage Officer has been developed jointly with Wrexham FIS to support families with a child with a disability to access childcare.

Childcare providers in Flintshire have a range of services for which they charge differing amounts. The average (median) hourly amount that parents paid for childcare in 2013 was £5.39 per hour. Prices for childcare in Flintshire would seem to be broadly in line with the rest of Wales, although there are some isolated differences.
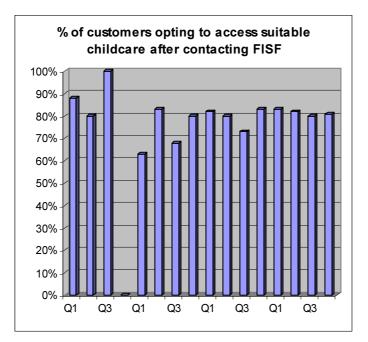
Just over 20% of the childcare providers surveyed in 2013 were planning to increase their fees in the coming year. Of those planning increases, the average price rise was approximately 3%.How providers charge for childcare can have a bearing on its accessibility to parents. In Flintshire, 48% of providers charge for their services in advance; 26% charge in arrears while the same number are flexible. Whilst it is good business practice to charge in advance, it can make accessing childcare more difficult for some parents. A third of childcare providers in Flintshire also ask for deposits from parents before they start using their services. This can range from a £5 registration fee to use a Cylch Meithrin to a £600 deposit to secure full daycare places in a nursery.

Overall, the majority of childcare providers in Flintshire class themselves as *English Medium*. Only 4% are *Welsh medium* with a further 2% being *Welsh and English* and 2% *Bilingual*. The largest proportion of *Welsh*

medium childcare is delivered by Mudiad Meithrin, providing sessional and wrap around care. In total, only 10% of childcare places are available through the medium of Welsh or bilingually. This is set against a Welsh speaking population of around 14% of all Flintshire residents. Welsh medium childcare is also only available in 5 out of 20 areas of the County.

Childcare information is supplied by Flintshire Family Information Service who operate a website, personal and telephone enquiry service to parents looking for childcare and information about a wide range of services to assist families. Of the 26,000 or so enquiries for childcare information made in 2013-2014, a consistently high percentage were assisted in making a positive choice about accessing childcare.

Figure 4:Customers accessing childcare after gaining information from FIS.

Childcare: Demand

To establish sufficiency, an assessment needs to be made of the demand for childcare by parents that will enable them to remain in, or enter, work.

An indication of unmet demand can be made from the number of vacancies available in settings, by type, across the area. Where there are high levels of vacancies, there may be low demand. Alternatively, settings with less than 15% spare capacity are likely to find it difficult to take many more children. Within an open market, this should indicate high demand and either sufficiency, or some unmet demand.

In December 2013, 11% of all childcare places recorded in Flintshire were vacant. While over half of all childcare providers had at least one vacancy, only 15% had a vacancy for a full-time place. Across the areas of the County vacancy rates ranged from 3% to 15%. Compared with vacancy rates in other authorities, Flintshire had very little spare childcare capacity in 2013. While this means that settings should be operating efficiently and sustainably, parents may not be able to access their preferred childcare service.
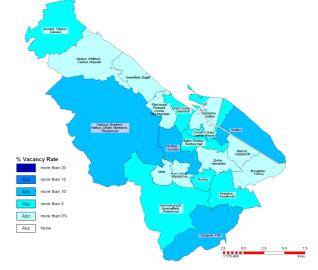
Figure 5: Proportion of vacant childcare places

The volume of enquiries that childcare providers receive is a further indication of demand for childcare services. In 2013, out of the 31 providers surveyed, 20% of providers said that they had received more enquiries for their services over the past 12 months; 28% said levels had not changed; while 24% said that demand was falling. There were some differences by sector, with more childminders reporting a drop in enquiries as opposed to other sectors where more than half reported an increase in demand. In total, 7 out of the 20 areas in Flintshire reported a net increase in demand for childcare. No areas reported an overall drop in

demand. The overall picture, would suggest that there is a healthy demand for all types of childcare provision in Flintshire.

Parents in Flintshire have some strong views about the availability, affordability and accessibility of childcare. Their opinions provide a good indication of demand for childcare by area, and by type. Due to a very low number (63) parents responded to the parent childcare survey, it is not statistically significant so cannot be used to conclude that their views are representative of parents across the County.

The survey found that 67% of parents of children aged 0 to 14 in Flintshire regularly use childcare. Relatives or friends provide the most frequently used childcare option with 17% of parents taking this option. Formal childcare is used by 50.3% of parents in Flintshire.

Overall, 92% of parents who expressed an opinion, said that they were satisfied with their current childcare arrangements. The most satisfied were parents using childminders, day nurseries and out of school clubs where there was over 90% satisfaction. Interestingly, there was a lower rate of satisfaction with current arrangements by parents using informal childcare suggesting that care by friends and relatives was not their first choice but was perhaps their only option.

Barriers to childcare use fall under a number of common themes: accessibility; availability; affordability; lack of information; and a lack of services catering for specific needs.

Nearly a third (33%) of all parents surveyed who gave an opinion, said that there is a good choice of local childcare. In many cases parents said that there was not a good range of services that catered for different situations and different age groups. In particular, out of school care was not sufficient to meet their needs – particularly during school holidays. By area, responses showed that in general, parents in the rural and outlying areas of the County felt that they had the least choice in childcare provision.

Some parents choose <u>informal care</u> because they prefer and trust their relatives. For others, it is the last resort and many parents clearly would prefer to use formal care if it were accessible and they could (or would) pay for it.

Supply data shows that childcare is not spread evenly across the County with childcare provision <u>accessible</u> in some areas but not in others. 45% of parents responding to the question said that they agreed that childcare was available locally where they needed it, but 38% of parents disagreed. In the *Gronant, Talacre, Llanasa* and *Broughton, Saltney* areas, a majority of parents said that the childcare they needed was not accessible to them.

The lack of appropriate childcare for <u>older children</u> (of secondary school age) was an issue that a large number of parents (over 10% of all comments) were concerned about.

A majority of parents say that <u>childcare was not available *when* they need it</u>. Many parents said that childcare was not available to enable them to work shifts; was not available outside 'normal' working hours; and was not available at the times of the year they required it.

Over 12% of survey respondents and <u>18% of working parents</u> said that they worked <u>shifts or unusual hours</u>. This is higher than was found in other areas of Wales. In some areas, over 35% of parents work a-typical hours.

While those working rotating shifts clearly find it most difficult to access childcare, parents having an early or later than usual start to the working day also find it difficult.

While <u>38%</u> of parents who were surveyed said that they <u>could afford to pay for childcare</u>, 43% said that they couldn't. As would be expected, those with higher incomes find childcare most affordable, while families with low incomes find it much more difficult.

Parents with low incomes, or low earning potential are also discouraged from using childcare by the reality – or the perception - that their salary would not, or would only just cover their childcare costs. Lone parents said that there was no incentive for them to work because they feel that as soon as they work more, or receive any maintenance, the same amount is taken away from their benefits.

Some of the parents who were interviewed said that it was difficult to find out about childcare, and support for childcare costs. Those parents

engaged with agencies usually had more information, but in general parents would like better information with which they can make informed decisions.

Of parents that use formal childcare 53% think that the quality of childcare locally is high, while 22% said that it was not. While the number of comments about poor quality of childcare was limited, some parents who use formal childcare raised some specific issues around the quality of care.

The parent survey suggests that there is some unmet demand for additional Welsh Medium childcare provision in Flintshire. 23% of parents in Flintshire – representing 6,000 children – said that there was not enough Welsh medium childcare. Those that highlighted a lack of Welsh medium services were most likely to be in the northern areas of the County, and *Shotton* and *Kinnerton, Penyffordd*.

Parents would clearly like to see some choice of Welsh Medium childcare of all types – including day nursery care, all types of out of school care and particularly holiday care.

Survey data shows how childcare use by families with disabled children differs from other families. Disabled children are less likely to be in day nurseries, with childminders, in out of school childcare or even cared for by family or friends. A far higher proportion of families with disabled children do not access childcare outside of the home.

While parents of disabled children had the same concerns as any others, their difficulties were often compounded by a lack of information, trust and flexibility.

Some parents of disabled children require help with asking for help. They are not sure what they are entitled to and struggle to cope with their everyday situation. This impacts on the children themselves who need to socialise with other children when not at school. For parents of young disabled children, childcare in day nurseries is possible but very expensive. Some parents have given up their former employment to look after their disabled child when they are very young, perhaps taking up more local, less well paid / low skill part time hours when the child reaches school age. Even then, there are significant barriers for many in accessing out of school care – both during term-time and in school holidays.

Parents of disabled children can themselves feel isolated as carers. In families where there are siblings, it can be very difficult for the parent to

take them out on excursions during holidays, when one child is disabled / has behavioural problems. This can result in the whole family being confined to the home.

Employers contacted for this assessment reported that staff recruitment and retention is generally not an issue in Flintshire area, and does not seem to be affected by any shortage of childcare provision. However, employers are increasingly aware of childcare as an issue with many larger employers engaged through the provision of childcare vouchers. There is an opportunity for the childcare sector to utilise this new interest to build mutually beneficial relationships. The local authority has a key role in facilitating this.

Statistical Evidence of Demand

In making a full assessment of demand, parents' needs must to be taken in context alongside an analysis of social and economic data. This is particularly important in making an assessment of whether additional childcare is likely to be sustainable. The following map is based on a range of data including parental demand; vacancies and a range of other data to suggest where demand for childcare in Flintshire is likely to be highest.
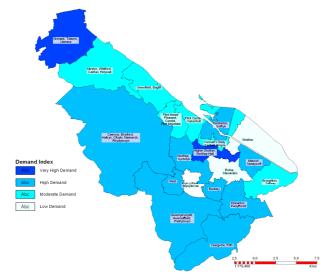
Figure 6:Childcare Demand Index Map

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Market Analysis

The evidence collected for the Childcare Sufficiency Assessment highlights many issues regarding the supply of childcare and the demand for childcare places in Flintshire.

Geographical Gaps

Relating the supply of childcare to demand is a complex calculation that involves many variables. The most obvious method of identifying childcare gaps geographically, is to examine current levels of provision in different areas and plan to 'bridge the gap' between the current level of provision and the average number of childcare places by type across the County.

In total, this would require 501 new daycare places (with day nurseries or childminders) to be created along with 435 term-time out of school places and 198 holiday scheme places. The total number of new places in each area are set out below:

Figure 7:Childcare gaps based on average levels of provision

Area	Additional Daycare Places	Additional After School Places	Additional Holiday Places
Gronant, Talacre, Llanasa	40	0	0
Holywell	52	51	24
Greenfield, Bagillt	62	8	0
Flint Castle, Oakenholt	0	0	0
Cornist, Flint Mountain	65	59	27
Cilcain, Nannerch,	0	0	0
Kelsterton, Golftyn	0	33	0
Wepre	31	27	0
Shotton	0	65	27
Higher Shotton, Northop Hall	52	42	21
Mancot, Sandycroft	46	42	20
Northop, Sychdyn	0	0	15
Ewloe, Hawarden	0	0	0
Bryn y Baal, Mynydd Isa	46	0	16
Broughton, Saltney	0	58	0
Mold	0	0	0
Buckley	56	42	0
Kinnerton, Penyffordd	0	0	15
Gwernaffield, Pantymwyn	15	0	20
Caergwrle, Frith	35	9	12

Filling the gaps identified through developing new childcare places would result in a minimum level of provision being available in all areas of Flintshire and there is some evidence from the levels of vacancies in current settings and in consultation with parents, that there is demand in some of the areas highlighted for childcare services to fill these gaps. In particular, comparing maps of where parents are least satisfied with the accessibility of childcare and the map above, shows up particular areas

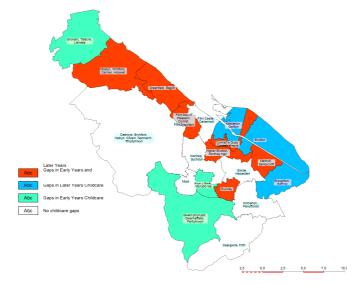such *as* Talacre, Mostyn,and Saltney as having childcare gaps and parents saying that childcare is inaccessible.

Figure 8: Childcare gaps based on average levels of provision

However, the analysis fails to take into account the range of demand evidence – such as vacancies - and also the need for childcare to be sustainable. Local issues such as the rural nature of areas of the County, and deprivation in other areas means that it is highly unlikely that the amount of new provision needed to make things equal, would be practical. For example, it is unlikely that nearly 150 new childcare places in the *Flint Mount Pleasant,* Cornist, Flint Mountain area would be sustainable given the amount of childcare available in the neighbouring Flint Castle, Oakenholt area. In the Mostyn, Whitford, Carmel, Holywell area, the childcare gap is 128 places, yet a higher than average unemployment and poverty may make this number of places difficult to sustain in the short term.

To identify areas of Flintshire where childcare is both needed and would be easily sustainable, the gaps in current provision need to be placed within the context of the Demand Index as set out in *Section 6*.

The following table combines a range of data to summarise the local childcare supply and demand situation in each area of Flintshire. While this may provide some guidance in developing strategy, further local context will need to be sought prior to any new development of childcare places.

Figure 9: Supply & Demand Analysis by Area

Area	Early Years Care Supply Level	Out of School Care Supply Level	Demand Level
Gronant, Talacre, Llanasa	low	high	high
Mostyn, Whitford, Carmel, Holywell	low	low	low
Greenfield, Bagillt	low	low	low
Flint Castle, Oakenholt	high	high	low
Flint Mount Pleasant, Cornist, Flint Mountain	low	low	low
Caerwys, Brynford, Halkyn, Cilcain, Nannerch, Rhydymwyn	high	high	high
Kelsterton, Golftyn	high	low	high
Connah's Quay Central and Wepre	low	low	low
Shotton	high	low	low
Higher Shotton, Northop Hall	low	low	high
Mancot, Sandycroft	low	low	high
Northop, Sychdyn	high	high	high
Ewloe, Hawarden	high	high	low
Bryn y Baal, Mynydd Isa	low	high	high
Broughton, Saltney	high	low	low
Mold	high	high	high
Buckley	low	low	high
Kinnerton, Penyffordd	high	high	high
Gwernymynydd, Gwernaffield, Pantymwyn	low	low	high
Caergwrle, Frith	low	low	low

Areas with *low* supply and *high* demand are those where development of more childcare is needed and should be sustainable *(eg. Higher Shotton, Northop Hall / Mancot, Sandycroft / Buckley / Gwernymynydd, Gwernaffield, Pantymwyn)*

Areas with *low* supply and *low* demand are those where it is unlikely that the market will develop childcare places. The needs of these communities may be being served by provision in neighbouring areas. Where they are not, to increase childcare supply intervention in the market is likely to be required to stimulate more demand (*eg. Mostyn, Whitford, Carmel, Holywell / Flint Mount Pleasant, Cornist, Flint Mountain / Caergwrle, Frith*)

Areas with *high* supply and *high* demand are those where the market is most likely to be functioning and market forces will meet supply with little further intervention (*eg. Caerwys, Brynford, Halkyn, Cilcain, Nannerch, Rhydymwyn / Northop, Sychdyn / Mold / Kinnerton, Penyffordd*)

Area with *high* supply and *low* demand are likely to have a sufficiency of childcare. It is possible that there could be an over-supply in these areas (*eg. Flint Castle, Oakenholt / Ewloe, Hawarden*) or that the supply in these areas is meeting demand elsewhere.

Type Gaps

Taking the average number of places by each type of childcare provision, the following table shows the number of additional places required of each type, in each area, to bring it up to the average level of provision for Flintshire.

Figure 10:Childcare Gaps by Type and Area

Area	Childminder Place Gap	Day Nursery Place Gap	Sessional Care Gap	Out of School Club Gap	Holiday Scheme Place Gap
Gronant, Talacre, Llanasa	7	34	0	0	0
Mostyn, Whitford, Carmel, Holywell	14	42	0	45	24
Greenfield, Bagillt	27	38	0	0	0
Flint Castle, Oakenholt	0	0	0	0	0
Flint Mount Pleasant, Cornist, Flint Mountain	21	48	26	51	27
Caerwys, Brynford, Halkyn, Cilcain, Nannerch, Rhydymwyn	0	0	0	0	0
Kelsterton, Golftyn	4	0	0	31	0
Connah's Quay Central and Wepre	0	53	39	40	0
Shotton	1	0	0	64	27
Higher Shotton, Northop Hall	0	50	24	41	21
Mancot, Sandycroft	13	36	22	37	20
Northop, Sychdyn	0	0	2	0	15
Ewloe, Hawarden	0	0	20	0	0
Bryn y Baal, Mynydd Isa	0	48	0	0	16
Broughton, Saltney	0	0	17	59	0
Mold	19	0	0	0	0
Buckley	0	60	14	47	0
Kinnerton, Penyffordd	0	0	1	0	15
Gwernymynydd, Gwernaffield, Pantymwyn	0	14	0	0	20
Caergwrle, Frith	0	39	20	12	12
Total	106	462	185	427	198

While this information may be useful in identifying areas where theoretical gaps exist, as with the broader analysis of childcare gaps, there may not be demand for these services, and a local analysis may indicate that needs are being met in adjacent areas.

Income Gaps

Compared with Wales as a whole, childcare in Flintshire is no more expensive yet, family incomes are slightly higher than the average. This suggests that childcare should be more affordable to more families. Yet higher than average levels of working mean that for many families childcare is more of a necessity.

Around 16% of families in Flintshire have earnings that take them beyond the limits for Child Tax Credit support and therefore, should able to afford to pay for childcare out of their earnings.

The majority of families in Flintshire are in middle-income bands with two working parents and using formal childcare. Around half of these families (mainly at the lower end of the middle-incomes bracket) said that they could not afford to pay for childcare, yet had to support their work. Some

said that it was a marginal decision whether or not it was worthwhile both partners going out to work. These parents should be getting support through tax credits, but evidence suggests that many do not bother to apply, or are not aware of the benefits. This group of parents are probably the most vulnerable to rises in childcare prices, or adverse economic conditions.

For other families in Flintshire, formal childcare is perceived - and often is - unaffordable. These are parents whose purchasing power is limited either because they do not work, their work is low-paid and part-time, or because they work longer hours in multiple jobs, the childcare element of the Working Tax Credit is insufficient to meet their childcare needs, or because they do not access the tax credit system through lack of trust. When they are in work, these parents are more likely to be using informal childcare. If they do not have relatives locally who can provide this, some choose not to work. However, if given the right support and information, some parents in these situations would be able to pay for childcare.

Given the data collected on childcare costs in *Section 5* set against information regarding incomes from *Section 4*, a number of examples can be constructed that illustrate the affordability of childcare in Flintshire.

Example 1: The average Flintshire family with two pre-school children

For the average Flintshire family, with one parent working full-time and the other working part-time (average net weekly income of £586.86 plus £86.42 in Tax Credits) with two pre-school children in part-time daycare (£146) would be spending 21.6% of their family income on childcare.

If they did not claim WTC, childcare would take up nearly 25% of their income.

Example 2: A lone parent with one pre-school child

For a female lone parent working full time will take home on average £363.40 per week plus £131.14 tax credit. Childcare will cost on average £146 per week representing 29.5% of her income.

If she did not claim WTC, childcare would take up 40% of her income.

Example 3: A low-income two-parent family with two school-aged children

For a family, with one parent working full-time and the other working part-time (both earning minimum wage) with two school-aged children using part-time out of school and holiday care costing on average £48 a week would spend 7% of their family income on childcare.

> **Example 4: A low-paid lone parent with one school-aged child**
> *For a female lone parent working full time earning on minimum wage of £188.66 per week plus £147.09 tax credit. Out of school care will cost on average £39.98 per week during term-time and £85.15 during holidays representing 14% of her income.*

It is clear that the proportion of family income spent on childcare is far greater when children require early-years care. Childcare costs as a proportion of family income are also greater for lone parents than couples.

Whether or not childcare is affordable will depend on a range of other factors – including housing and other household costs, as well as and individual perceptions of what people find affordable.

To enable more parents to use childcare in Flintshire, strategies are needed that tackle both affordability for parents on low incomes and increase accessibility for parents who can afford childcare but have no access to it. The lack of vacancies for many services – and out of school care in particular - is also a factor that makes it difficult for parents to match work and childcare commitments.

The low level of tax credit take-up is likely to be a factor in the affordability of childcare. If more parents took up their entitlement, the childcare sector and the economy as a whole would benefit.

Specific Needs Gaps

All the evidence suggests that disabled children are not taking up childcare places in proportion to their population, with the parents of disabled children facing additional barriers in accessing childcare. A complicating factor is that the parents of disabled children would often like childcare for respite and social reasons rather than to support work, which takes the responsibility to assure sufficiency away from the Council's statutory duty under the Childcare Act. However, there is some evidence from schemes that have supported disabled children to access childcare (eg. in Oxfordshire) that once they have settled in a childcare setting, their parents often recognise the opportunities that this brings and then feel confident enough to access work or training.

While some parents would prefer additional specialist provision for disabled children, increased accessibility to mainstream services is the main issue that needs to be addressed. However, accessibility to services is also limited by a general lack of spare childcare capacity in Flintshire that affects all parents, but is likely to exacerbate the situation for parents of disabled children.

The gaps in provision for disabled children are often greater as they get older. For many disabled children, developmental differences with their peers become greater and childcare provision becomes less age-appropriate. For disabled children in secondary education, there is no provision that is likely to be able to meet their needs.

Time Gaps

While some group care providers offer longer hours than many across Wales (eg. there is some day nursery, out of school and holiday provision that offers 7am to 7pm), the majority of childcare available in Flintshire operates within fairly 'standard' hours despite the fact that a large proportion of parents work shifts or unusual hours.

Care to cater for parents working unusual hours, shifts, weekends and overnight is available in Flintshire with a small number of childminders. The ability for childminders to provide this service is an important reason to value and nurture a diversity of childcare provision.

 It would be helpful for all childcare providers to regularly review their hours in consultation with their customers.

Language Gaps

Taking the estimate of 13.2% Welsh speakers in Flintshire set against the 5% of childcare places currently available in the County through the medium of Welsh or bi-lingually, an additional 488 Welsh medium childcare places would be needed to ensure that all Welsh speaking families had access to Welsh medium or bi-lingual childcare in the same proportion as the English speaking population. Given that Welsh-medium childcare is limited to a small number of Cylch Meithrin, there are likely to be gaps in Welsh-medium or bi-lingual childcare in all types of childcare and most areas of Flintshire.

Age Gaps

2 and under

There is a limited supply of childcare places for this age group and few vacancies for babies, suggesting that more provision could be sustained. However, there were very few comments from parents with children in this age-group to suggest that there is a critical shortage. Most parents seem to recognise that supply is limited and therefore booking their place in advance is critical. The increase in maternity leave entitlement has reduced demand for provision for 6month-12 month old babies.

3 and 4 year olds

Most three and four year old children are in receipt of funded early education places in schools and 'approved' settings, for which there seems to be plenty of supply. An amount of wrap-around care is available in both day nurseries and in playgroup plus / Meithrin +settings. Nonetheless, provision is not universal and there would seem to be limited vacancies indicating unmet demand. More wrap-around care could provide parents of three and four year olds with more choice and flexibility to be able to work. As four year olds enter reception classes they are often using out of school clubs, where there are some issues around supply, and a small number of out of school clubs that have higher age-limits.

5, 6, 7 and 8 year olds

Although Flintshire has a high level of out of school care compared with other authorities, provision is not universal and there would seem to be a number of parents who would like to see more provision, particularly at the schools not currently served by an out school club. In addition, there is a shortage of places in clubs that was highlighted by parents and reinforced by vacancy data.

Holiday care is unavailable in many parts of the County and the number of places available is very limited. There would seem to be a considerable amount of unmet demand expressed by parents for more holiday provision however the existing provision of holiday care reports a reduction in demand and issues of sustainability...

8, 9 & 10 year olds

There is no evidence of any significant difference in the availability of childcare for this age-group that for 5 to 8 year olds, with most out of school care catering for the entire primary-school age-group. However, use of out of school clubs was found to decrease, as children got older. Some parents commented on the quality of some out of school clubs in catering for older primary school children. The appropriateness of provision may be a factor in take-up of places for this age-group.

11 to 14 year olds

As parents increasingly rely on good quality school aged childcare for their children in primary schools, many working parents are unhappy about children being left to go home alone at the end of the school day. Appropriate provision for older children is needed in or around secondary schools during term time and during school holidays. This will become more important in light of planned changes to the benefits system.

Parents are no longer be able to claim Income Support solely on the grounds of being a lone parent. From October 2009 this was extended to parents with a youngest child aged 10 and then from aged 7 or over from October 2010.The Welfare Reform impacts are starting to be felt locally and Shotton is a pilot area for Universal Credit.

Disabled children aged 15 to 17

There is no specific provision, apart from holiday care, available for this age-group of disabled children in Flintshire, and with a limited number of places advertising for children over 11 years of age, childcare for disabled young people aged 15 to 17 is likely to be very limited. While it is possible that should an older disabled young person require a place in an out of school club, they could be accommodated with the right support, for some disabled children, their developmental age might be a barrier in choosing an appropriate setting.

Recommendations

Given the local authorities role in managing the childcare market the following recommendations should be followed to bridge current supply and demand gaps.

Pre-School Childcare

While Flintshire has higher than average levels of childcare for pre-school children, there are a some areas where further development could take place and would be sustainable as indicated by a high demand for services in, for example, the *Talacre, Llanasa / Higher Shotton, Northop Hall / Mancot, Sandycroft / Bryn y Baal, Mynydd Isa / Buckley and Gwernymynydd, Gwernaffield, Pantymwyn* areas. The role of the local authority should be to oversee the operation of the market here through encouraging new group care, and targeting recruitment of childminders, but it should not need to intervene.

In areas where there are low levels of Pre-school Childcare but there is low demand, it is unlikely that additional provision would be sustainable in the short-term. This is true in areas such as *Flint Mount Pleasant, Cornist, Flint Mountain* where there is significant provision in the adjacent area. In the most deprived areas of Flintshire – *Shotton* and *Flint Castle, Oakenholt*, there is already a high level of early years provision that should be enabling parents to train or work and therefore have an impact on child poverty. However, there are more deprived areas of the County – notably *Greenfield, Bagillt* and *Mancot, Sandycroft* where supply levels are very low. If provision could be encouraged to develop in these areas (through for example, short-term incentives) it would break down barriers that currently restrict parents' ability to work. In the *Greenfield and Bagillt areas* in particular, the lone parent rate is much higher than the County average and therefore more parents are likely to need childcare support to become economically active.

Childminders in Flintshire provide the backbone of childcare provision for all ages but are the most vulnerable to new group-care developments. They also provide a range of more flexible childcare for parents working unusual hours. The local authority needs to carefully monitor their numbers and should continue to promote childminding services to parents to retain this core level of flexible childcare provision.

Appropriately trained and resourced childminders could also provide the key to enabling more parents of disabled children to access childcare.

Early Years Education

There would seem to be plenty early years education provision to meet existing demand in Flintshire and overall, parents and carers are satisfied with the quality of provision. There is no case for developing any significant number of new places other than to provide parents with more choice in some areas, and more choice of early education and childcare provision that meets the needs of working parents though wrap-around care.

School-aged Childcare

The focus on developing after and before school services should be firstly, around filling the small number of gaps in provision to ensure that all primary schools in Flintshire are adequately served by an out of school club. In many cases this can be achieved as part of Out of School Childcare Programme. Secondly, vacancy levels need to be monitored and where there is insufficient space to meet local needs, the development of additional places should be encouraged.

There is growing demand for the development of specific services for children of secondary school age that also needs to be addressed as part of Out of School Childcare Programme. The appropriateness of care provided needs to be examined to ensure that it is meeting the needs of older children and young people. To this end, young people should be engaged alongside their parents to establish how their needs can be met.

Levels of holiday provision are very low in Flintshire with considerable unmet demand expressed by parents across the County. Only a small number of after school clubs currently offer holiday care and these could be encouraged to work together in clusters to develop larger, more sustainable holiday schemes.

The development of specialist childcare for school-aged disabled children should be supported as well as improving information, training and advice to mainstream out of school clubs to enable them to become more accessible to disabled children and young people.

Flexible Childcare

All childcare providers need to be encouraged to examine the flexibility of their services to meet the needs of parents. Childcare providers in general need to become more customer focused and talk to parents who use their services (and those that don't).

While there are parents who work shifts, weekends and other unusual hours, there are probably not enough of them wanting childcare at the same times to sustain new or extended provision. However, childminders currently provide a range of flexible services that could meet the needs of some parents, but this is not always known by parents.

Information

The profile of Flintshire Family Information Service should continue to be publicised to promote information for parents with which they can make educated choices about childcare. Accessible, accurate information is the key in enabling parents to use childcare that in turn will sustain existing services and stimulate new demand.

A coordinated approach delivered in harmony by a range of agencies (covering childcare, housing, debt advice, Job Centre Plus etc.) is needed to provide parents in hard-to-reach and marginalised groups with information that enables them to overcome the barriers to finding and remaining in work. The Novus/Quest Project has been active in taking this approach, but method needs to be mainstreamed beyond the life of the project. For migrant families, there is likely to be a need for childcare information to be made available in languages other than English or Welsh.

Employers in Flintshire would generally welcome a relationship with FIS and the ability to provide information to their employees or signpost employees to the helpline.

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Flintshire Family Information Service will need to examine the way in which data is collected and held to fulfil the on-going duty to undertake a Childcare Sufficiency Assessment. In particular, information on childcare that is not registered but requires inclusion in the Sufficiency Assessment should be gathered and category definitions need examination to account for new services, such as 'playgroup plus / cylch plws'. The categorisation of 'services' rather than 'settings' is would help in the sufficiency analysis.

Sustainability

Because most existing childcare in Flintshire should be sustainable through market forces, local authority intervention and funding to the sector needs to be focused on supporting existing high quality provision to attain sustainable occupancy rates, while recruiting new providers (mainly childminders) to cover natural wastage (the recruitment and retention of

flexible childminders is critical as this is the only option for parents working unusual hours).

Where new services need to be developed to fill gaps identified in this report, in most cases the local authority's role will be in supporting market-led developments. In areas where the market is not functioning, the Council will need to support developing provision as part of Community Focused Schools, Flying Start and Integrated Centre developments.

The sustainability of all childcare provision in Flintshire would be helped by the provision of better support and advice to parents on accessing financial support for childcare, including the childcare element of the Working Tax Credit.

Welsh Medium Childcare

There is clearly unmet demand alongside limited supply of Welsh medium childcare in Flintshire. There is limited access to both pre-school and school-age Welsh medium childcare. The local authority should encourage new Welsh medium childcare places to be developed to meet what seems to be a demand from not only Welsh speaking parents, but from a wide range of families.

In some areas, parents would like to see more choice of Welsh medium childcare, but additional childcare places are not always needed. There is a danger of unsustainable competition for a limited number of children if parallel Welsh and English medium settings are created in areas where there is no significant demand for additional childcare. This would lead to sustainability problems for both. This could be avoided if more Welsh-medium or bi-lingual childcare options for parents were developed within existing settings, and more Welsh speaking childminders were recruited.

Whereas to date, the local authority has supported Welsh medium *settings*, resources should be re-configured to provide support for Welsh medium *places* in a wider range of childcare settings alongside general Welsh language support accessible to all providers.

Views of Children and Young People

Children and young people reported that they mainly go to childcare because their parents are working.The main messages from the consultation indicated a need to improve access to outside play provision and to encouraging the workers to engage in more outdoor activity with the children.

The Role of the Local Authority

The duties on Flintshire County Council to manage the local childcare market need to be taken seriously and resourced appropriately. Childcare should be recognised as a crosscutting issue that benefits the wider economy and community as much as individual children and families.

This assessment of sufficiency suggests that the childcare market is functioning adequately across much of the County in meeting the needs of most working parents. However, there are areas where there are shortfalls in the volume or type of childcare. Here, childcare is insufficient to meet not only the demands of working parents, but also insufficient to break down the barriers to work or training that a lack of childcare creates for families not in work.

In the majority of areas, the role of the Authority should be in monitoring levels of supply against changing demand; providing information; and ensuring high levels of quality. Additional resources are needed to target hard-to-reach groups of parents who need intensive support, or specific areas where the market is not functioning. This could make a dramatic difference to families and their ability to participate and contribute to the local economy, and to raise children out of poverty.

Information Sources

The most recent data available has been used throughout this assessment and we acknowledge that this may not be as current as we would wish. However data collected will be revised and updated annually to be included in the annual review of this Childcare Sufficiency Assessment.

Information sources include:

Reports resulting from:

Parents Consultation

Childcare Provider's Consultation

Employer's Consultation

Children and Young People's Consultation

Infobase Flintshire

Flintshire Family Information Service

Daycare Trust

Welsh Index of Multiple Deprivation Child Index 2008

Census 2011

Office for National Statistics: Mid year population estimates

Office for National Statistics: NOMIS

Office for National Statistics: Neighbourhood Statistics

Local Government Data Unit Wales: Infobase Cymru

Job Centre Plus

Care and Social Services Inspectorate for Wales

HM Revenue and Customs: Child and Working Tax Credit

Statistics

Department for Work and Pensions

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