

Executive Summary

Introduction

All local authorities in Wales have a responsibility under Section 26 of the Childcare Act 2006 to prepare Childcare Sufficiency Assessments (CSA's). This is to have a clear understanding of the childcare provision in their area, the needs of parents/carers and to develop an action plan to address any gaps identified. This report is based on the guidance *Childcare Sufficiency Guidance (July 2016)* and the Welsh Government circular *WGC 003 2021 WG21-28 Childcare Statutory Guidance (2016): Securing Sufficient Childcare and Childcare Sufficiency Assessments (March 2021)*.

The aim of the report is to identify key strategic priorities for the provision of childcare services in RCT for the next five years.

Methodology

The main sources of supply and demand data used in the production of the CSA are the Self-Assessment of Service Statement (SASS), data held by the Family Information Service (FIS) and the parent/carer survey that was conducted in autumn 2021.

Self-Assessment of Service Statement (SASS)

The SASS is a requirement placed on all childcare providers registered with Care Inspectorate Wales (CIW). This provides CIW with information to plan their inspections and helps advise Welsh Government on the state of the childcare sector in Wales. The survey was completed between 7th July and 11th August 2021. Despite being a statutory requirement, the completion rate from providers in RCT was 87.0%. Officers contacted those that did not complete their SASS and a further 11 paper returns were submitted, making the overall completion rate 92.3%. The SASS provides the main supply data in this CSA report.

Family Information Service

Supply data for unregistered/exempted childcare providers has been taken from data held by the RCT Family Information Service (FIS) and provider questionnaires completed in November 2021. A total of nine questionnaires were received. Based on Family Information Service (FIS) data and local knowledge, officers are aware of additional unregistered childcare providers within RCT than the level of returns suggests. Caution must be used, therefore, when analysing unregistered provision data.

Parent/Carer Survey

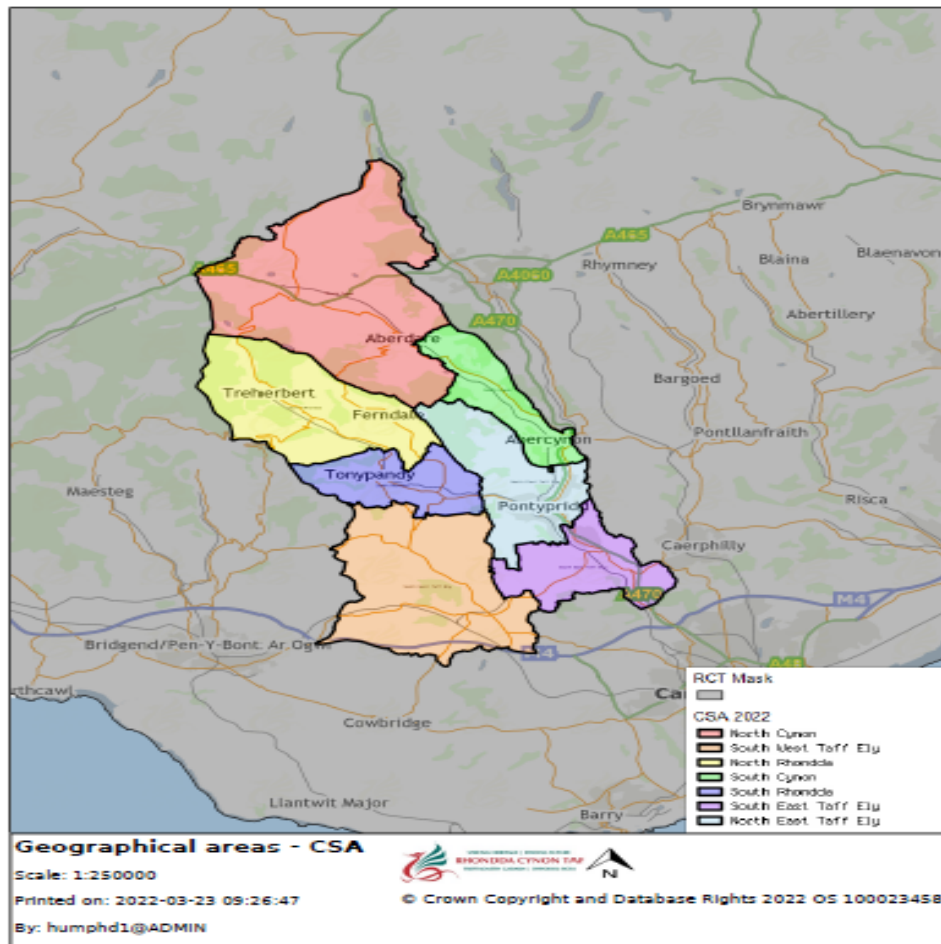
Welsh Government developed a survey that was used by all local authorities in Wales to gauge parental views on the supply and quality of childcare. This was undertaken in October 2021. It has provided consistent data that all local authorities can use to develop their CSA reports, alongside their local knowledge and datasets. RCT received 823 completed questionnaires. This survey provides the main demand data in this CSA report.

Geographical areas

For the purposes of the 2022 CSA report, wards have been grouped according to the Community Resilience Hub and Neighbourhood Network Areas (see below). These are one aspect of the Council's 'RCT Together' strategy. This is the Council's approach to working in partnership with communities and residents that offers support to individuals, groups and services through Community Asset Transfers, Network Hubs and support with funding, resources and community consultation advice.

Please note, this report was written before the implementation of the electoral ward boundary changes recommended by the Local Democracy and Boundary Commission for Wales. These come into effect at the May 2022 Local Government elections. Reference will be made to these amended electoral wards in the 2023 CSA annual update report and action plan.

North Cynon	South Cynon	North Rhondda	South Rhondda
Aberaman North Aberaman South Aberdare East Aberdare West/Llwydcoed Hirwaun Penywaun Rhigos	Abercynon Cwmbach Mountain Ash West Mountain Ash East Penrhiwceibr	Ferndale Maerdy Pentre Treherbert Treorchy Tylorstown Ystrad	Cwm Clydach Cymmer Llwynypia Penygraig Porth Tonypany Trealaw Ynyshir
North East Taf Ely	South East Taf Ely	South West Taf Ely	
Cilfynydd Glyncoch Graig Pontypridd Town Rhondda Trallwng Treforest Ynysybwl	Beddau Church Village Hawthorn Llantwit Fardre Rhydyfelin Central/Ilan Taffs Well Tonteg Tyn-y-Nant	Brynna Gilfach Goch Llanharan Llanharry Llantrisant Town Pontyclun Talbot Green Tonyrefail East Tonyrefail West	



Partnership Working and Consultation

In the preparation of this CSA, a range of stakeholders were consulted in order to fully understand their views on the childcare market in RCT. The draft report will be published on the Council website in summer 2022 for a period of 28 days so that all interested partners can submit comments on the content.

Partners consulted for their views on the childcare sector in RCT included:

- Family Information Service
- Parents/carers
- Childcare providers
- Persons representing those with an interest in childcare:
 - Clybiau Plant Cymru Kids' Clubs
 - Early Years Wales
 - Mudiad Meithrin
 - NDNA Cymru
 - PACEY Cymru
- Local employers
- Neighbouring local authorities
- Schools
- Welsh Medium Education Forum
- Play Sufficiency Assessment Working Group

- Job Centre Plus
- Planning department

Welsh in Education Strategic Plan (WESP)

The RCT Welsh in Education Strategic Plan (WESP) 2022 to 2032 is due to be adopted in September 2022 (subject to Welsh Government approval). The plan aims to increase the number of year one learners in Welsh medium education by between 8% and 12% during the ten year lifespan of this WESP. This equates to an increase from 506 year one learners now to between 720 and 825 year one learners in Welsh medium education by the end of the new WESP.

The main target within the WESP that relates to the CSA is ***Outcome 1: More nursery/ three year old learners receive their education through the medium of Welsh***. To support the target of increasing the number of year one learners, the Council will continue to work with external organisations and colleagues to promote Welsh medium childcare and education. We will do this by:

- Supporting Welsh medium childcare providers to extend and improve the services they offer by offering business support, new provision/expansion of provision grants, training and signposting to relevant external organisations.
- Providing information about events and courses that parents/carers can attend with their children will continue to be shared via Council networks and Officers will continue to promote and raise awareness of the Welsh medium childcare available to parents/carers.
- Making changes to the Flying Start commissioning process, which will mean more Welsh medium Flying Start childcare places are available to those families that choose it.
- Keeping under review the number of Welsh medium Registered Education Providers to ensure that those parents/carers that wish to access a pre-nursery FPN education place are able to.
- Working with the WESP steering group and Marketing and Promotion Group to support the aims of the WESP.

Parent survey

There were a total of 347 responses to the question 'Can you understand, speak, read or write Welsh'. Of these, 91% stated that they understand Welsh (316), with 61.1% stating they can speak the language (212). Of those that supplied a postcode, the highest level of Welsh language skills appears to be in South West Taf Ely, South East Taf Ely and North East Taf Ely. South Cynon appears to have the lowest levels of Welsh language skills amongst parents. Of course, it should be remembered that this is based on the respondents to the parent survey, and not on demographic data used in the WESP.

Current use of Welsh medium childcare

75% of parents stated that they do not currently access childcare through the medium of Welsh (348). 22.2% responded that they do access Welsh medium childcare (103). The projection in the WESP target is for 20.6% of nursery aged children to receive their education through the medium of Welsh in 2022-2023. This figure is lower than the parent survey suggests of families currently accessing Welsh medium childcare. This implies that there may be some parents who do not choose to transition from Welsh medium childcare to Welsh medium education. Therefore, more work is needed to analyse transition routes to understand if this is indeed the case.

Future use of Welsh medium childcare

Of those that don't currently use Welsh medium childcare, 9.7% stated that they would like to access childcare through the Welsh language (34), with 18.6% stating 'maybe' (65). The highest number of those stating 'yes' are located in the South East Taf Ely and South West Taf Ely area, with the highest number of those stating 'maybe' located in South West Taf Ely.

Parents who stated they would like to use Welsh medium childcare were asked what issues they face accessing Welsh medium care. The majority of responses stated that it was due to a lack of availability with 69.8% of parents stating this (58). South West Taf Ely was the area that had the highest number of this response (17), followed by South Rhondda (10). Recent capital projects have increased the number of Welsh medium childcare places available in the South West Taf Ely area, which will improve availability of services. Development of additional Welsh medium childcare provision in South Rhondda should be investigated further to identify exactly where additional services are required, and whether this is for pre-school or out of school hours services.

Current Welsh medium childcare provision

Whilst there is a good range of CIW registered Welsh medium pre-school childcare available in RCT, services for school aged children remain sporadic and largely unregistered. This is improving and the Council will continue to work with partners to support the registration and expansion of out of school and holiday care where there are identified gaps.

A mapping exercise was undertaken in 2021 to identify gaps in Welsh medium pre-school childcare services. This will be updated regularly and used as a basis for exploration of future developments. Alongside this, officers will continue to strengthen partnership working with organisations such as Mudiad Meithrin and Menter Iaith in order to develop and extend childcare services through the medium of Welsh.

The SASS returns indicate that South East Taf Ely has the highest number of Welsh medium, or dual language, CIW registered settings (8), followed by North East Taf Ely and South West Taf Ely (5 each). Full day care is the childcare type with the most Welsh medium or dual language settings (18), followed by sessional care (6). Only one childminder reported that they are Welsh medium, whilst two reported they offer a dual language service. There are four unregistered Welsh medium settings reported in the CSA, three out of school settings and one sessional setting, all in South Rhondda and South West Taf Ely.

No Welsh medium or dual language childcare settings of any childcare type reported that they had waiting lists for school holiday care. For term time provision, only one dual language childminder, in North Rhondda, reported a waiting list. Welsh medium and dual language full day care providers in all areas, except North East Taf Ely and South West Taf Ely, reported waiting lists for term time provision. Only two Welsh medium sessional care providers reported waiting lists, one in South East Taf Ely and one in South West Taf Ely. No Welsh medium or dual language out of school care providers reported waiting lists for either term time or school holiday provision.

There is a good range of Welsh medium settings that deliver FPN education. A new commissioning model is currently being piloted by Flying Start to increase the number of Welsh medium settings that deliver this scheme. Parents have the choice of which CIW registered provider they use to access the Childcare Offer. Therefore, the number of Welsh medium providers delivering this service is predominantly dictated by demand from parents.

Supply of childcare

The supply data within the report notes the following number of childcare settings in RCT (all languages) at the time the SASS returns were completed:

Number of CIW registered settings – by AREA

Number of CIW registered settings – by AREA	Childminder	Full day care	Sessional day care	Crèche	Out of School care	Open access play provision	Nanny*	Total settings
North Cynon	11	7	1	0	0	1	0	20
South Cynon	4	6	2	0	0	0	0	12
North Rhondda	9	12	2	0	0	1	0	24
South Rhondda	5	9	2	0	1	0	0	17
North East Taf Ely	21	3	5	0	2	0	1	32
South East Taf Ely	25	9	5	0	1	0	0	40
South West Taf Ely	21	10	8	0	6	3	1	49
Total	96	56	25	0	10	5	2	194

**Home Childcare Provider scheme, January 2022*

Number of Unregistered settings – by AREA

Number of Unregistered settings by AREA	Sessional day care	Out of school care	Open access play provision	Total settings
North Cynon	0	0	0	0
South Cynon	0	1	1	2
North Rhondda	3	0	1	4
South Rhondda	4	1	0	5
North East Taf Ely	0	0	0	0
South East Taf Ely	0	1	0	1
South West Taf Ely	0	3	1	4
Total	7	6	3	16

Childminder

Childminding tends to be the childcare type with the most fluidity within the market. As this childcare type is based in private homes, it is very dependent on the personal circumstances of the childminder, hence a relatively high turnover of registrations. The South Rhondda

area has historically seen low levels of childminders, which development and promotional work in previous years has failed to address. Renewed efforts in this area would be advantageous.

Full day care

Since the introduction of the Childcare Offer for Wales in 2017, there has been a move by sessional care providers to re-register with CIW as full day care providers. This is not so that they can offer the full range of services that traditional full day care providers offer. But rather to give them the flexibility to offer additional services to cater for the Childcare Offer, such as wraparound services for nursery aged children and care during lunchtime periods.

The highest concentration of full day care providers is in North Rhondda (12) followed by South West Taf Ely (10). North East Taf Ely has the least number of full day care settings (3). This area covers Pontypridd town, as well as the student area around the University of South Wales in Treforest. As a result, the wards in this area have some of the lowest numbers of 0-17 year olds of the whole of RCT. There is also a lack of suitable venues which means that, despite several explorations in the past, the development of full day care services has been a challenge. Since the last CSA report, there has been significant building developments in Pontypridd including the creation of the Llys Cadwyn building and the redevelopment of the YMCA building, due to be complete later in 2022. There is space planned in the YMCA for a childcare facility. This will be a small facility but is likely to cater for some unmet demand in the area.

Sessional care

It can be noted that there is a concentration of unregistered sessional care providers based in the North Rhondda and South Rhondda areas. Engaging with these settings and encouraging them to register with CIW will be a priority for the Council.

There appears to be a low number of CIW registered Sessional care providers in the Cynon and Rhondda valleys. This may be as a result of settings becoming full day care providers or may be distorted due to the number of unregistered settings. Further investigation may be prudent to establish if there is additional demand for sessional care services in these areas.

Crèches

Crèches provide flexible childcare solutions to parents who need childcare for specific purposes, such as attending training courses. There are currently no CIW registered Crèches in RCT. Due to the changing nature of working patterns caused by the pandemic, many parents are working from home, although there are now moves to return to office working albeit on a part time basis. There may be parents, therefore, who only require childcare on an ad hoc basis, or for part of a day in order to attend their offices. Exploration of flexible, ad hoc childcare, or crèche facilities would be prudent to determine if there is sufficient demand for this type of care, and if so, the best way to develop it.

Out of school care

The highest number of CIW registered out of school care settings is in South West Taf Ely, followed by North East Taf Ely. The highest number of unregistered out of school clubs is recorded within South West Taf Ely, with South Cynon, South Rhondda and South East Taf Ely recording one unregistered setting in each area. As with unregistered sessional care providers, engaging with these settings and encouraging them to register with CIW will be a priority for the Council.

Open access play provision

The highest number of CIW registered open access play providers is in South West Taf Ely, followed by one each in North Cynon and North Rhondda. There is one unregistered setting in each of South Cynon, North Rhondda and South West Taf Ely.

Nanny

Nannies provide care for children, typically within the child's own home. The Approval of Home Childcare Providers (Wales) Scheme (2021) now provides a regulatory framework within which nannies can operate. Registration on this scheme is voluntary, but it allows parents to access a range of financial assistance with fees and enables the nanny to demonstrate that they meet certain criteria within a structured scheme. There are currently two nannies on this scheme within RCT, one in North East Taf Ely and one in South West Taf Ely. To date, engagement with nannies has not taken place. However, the Council is keen to engage with these, and other nannies in the county, so that they can access the support and guidance that other childcare settings receive. They will also be able to access the funded training that the childcare development team provide. This will be a priority over the course of this CSA report.

CIW registrations/cancellations

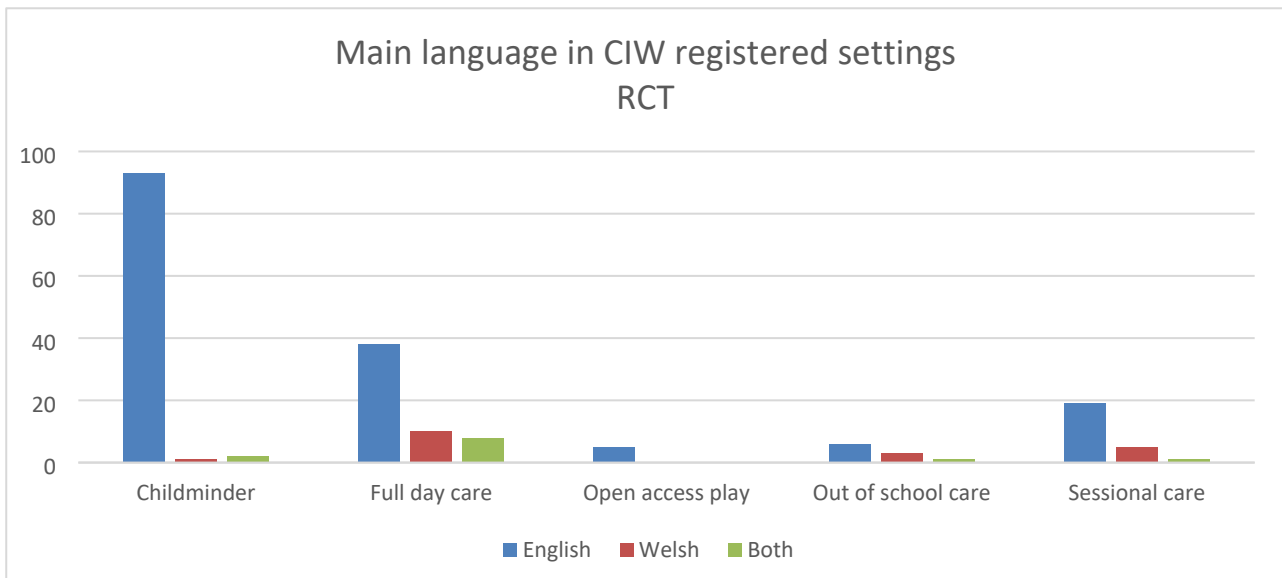
The COVID-19 pandemic has been extremely challenging for childcare providers, and has resulted in decreased attendance, staffing issues and increased costs (such as additional cleaning, heating costs, etc.). Keeping their own families safe, as well as the staff and children in their businesses has been particularly difficult for childminders. It is perhaps not surprising, therefore, that we have seen a significant reduction in the number of childminding places available over the last two years. Since January 2020, 36 childminders have cancelled their CIW registrations and only eight new childminders have registered. This has resulted in a net loss of 205 registered places.

The impact on other childcare types has not been as obvious. Since January 2020, there has been a net increase of 63 places for full day care. As mentioned, this is likely as a result of sessional care providers changing their CIW registrations. A net increase of 20 places for sessional care has been noted, with new registrations in South Rhondda and South East Taf Ely. The only registered Crèche cancelled its registration, resulting in a net loss of 10 places. The Council is not aware of any other Crèche facilities operating or looking to open in the near future.

Since January 2020, there has been a net increase of 167 places for out of school care. In July 2021, a well-established out of school club closed in the South East Taf Ely area due to the retirement of the leader. This club collected children from several schools in the area. Two new clubs were established to cater for two of the schools affected. This accounts for most of the increased places.

Language used in settings

It can be seen that, in both CIW registered settings and those that are Unregistered, English is the most common language used. The most common childcare type to offer Welsh medium or dual language provision is full day care. The highest number of Welsh only settings is in South West Taf Ely (3), followed by North Cynon and North Rhondda (2 each).



Opening times

Childminder

Childminders offer the most flexible opening times for families, with up to 75 stating in their SASS that they offer care before 8am. Ten reported that they offer care after 6pm on weekdays. Nearly all childminders offer care in term time and school holidays (87), with most open for all holiday periods except the Christmas break where only 27 stated that they offer care. Only five stated in their SASS that they offered care in term time only.

Full day care

Full day care providers also offer families the most range of services and the longest opening hours, although not as flexible as childminders. 24 full day care settings open before 8am during weekdays, whilst only one setting reported that they remained open after 6pm. 17 full day care providers stated that they work term time only, whilst six stated that their opening times differ in the school holidays from term time. This relatively high number may be the sessional care providers who have registered as full day care settings to offer increased services in term time, but do not wish to open in holiday periods.

Of the full day care providers that do open in the school holidays, the majority open every holiday period, except for the Christmas break, with 21 stating that they are open, and 17 stating they are closed.

Sessional care

No sessional care providers offer atypical opening hours (before 8am, after 6pm, weekends or overnight). 18 Sessional care providers stated that they operate in term time only, whilst 1 stated that their opening times differ in the school holidays from term time. Of the sessional care providers that do open in the school holidays, all open for some period through the summer holidays, whilst none open at Christmas.

Out of school care

One out of school setting care provider stated that it opens before 8am and none open after 6pm during weekdays. Four out of school care providers stated that they only operate in term time, whilst two stated that they were open only in the school holidays. Of the out of school care providers that do open in the school holidays, the majority open every holiday, except for the Christmas break.

Open access play provision

One open access play provider reported that they are open during term time as well as holiday periods. This setting reported that their opening hours are 4pm to 5.30pm each Monday. No open access play providers offer atypical opening hours (i.e., before 8am, after 6pm or overnight). Nearly all open access play providers open in all holidays, with the exception of the Christmas break, when none are open.

Waiting lists/Vacancies

Analysis of waiting lists indicates that childcare settings in all areas have waiting lists for full day care. There are also waiting lists in settings for before and after school care in all areas, other than North Rhondda. However, there are also settings in all areas that have reported that they have vacancies for full day care, as well as vacancies for before and after school care. Therefore, further investigation will be necessary to determine the exact areas that have either a surplus or shortage of required childcare types.

Childminder

For childminders, North East Taf Ely and South East Taf Ely had the highest number of settings reporting waiting lists for before school care (2 each), whilst childminders in South East Taf Ely and South West Taf Ely reported the highest number of vacancies (9 each) for this type of care. For full day care, childminders in North East Taf Ely reported the most waiting lists (8), whilst South East Taf Ely reported the most vacancies (13), followed by South West Taf Ely (9).

Full day care

Most waiting lists in full day care settings are for full day care and AM playgroup or Cylch Meithrin sessions. South West Taf Ely had the highest number of settings reporting waiting lists for full day care (3), followed by South Rhondda (2). The highest number of settings reporting waiting lists for AM playgroup or Cylch Meithrin sessions were in South Rhondda (3) followed by North Cynon (2).

Overall, full day care settings in all areas reported vacancies for full day care, AM and PM sessions and Early Education placements. Settings in North East Taf Ely reported the lowest level of vacancies across the different services offered compared to the other areas.

Sessional care

Most waiting lists in sessional care settings are for morning sessions, with South West Taf Ely having the most settings reporting this (3). Every area, except South East Taf Ely reported vacancies for afternoon sessions, with only one setting in South Cynon reporting a waiting list for afternoon sessions. North East Taf Ely had the highest number of settings reporting vacancies for morning and afternoon sessions (3 each).

Those registered as sessional care providers reported that they do not offer any other services, other than Early Education places or lunchtime care. This is not surprising, as most sessional care providers who have expanded to offer additional services have re-registered with CIW and are now registered as full day care providers.

Out of school care

Only out of school settings in South West Taf Ely have either waiting lists or vacancies for after school care (2 of each). One setting in South West Taf Ely reports vacancies for before

school care. This does not indicate the level of demand that the parent survey suggests. Further exploration will determine if there is indeed a need for additional out of school care.

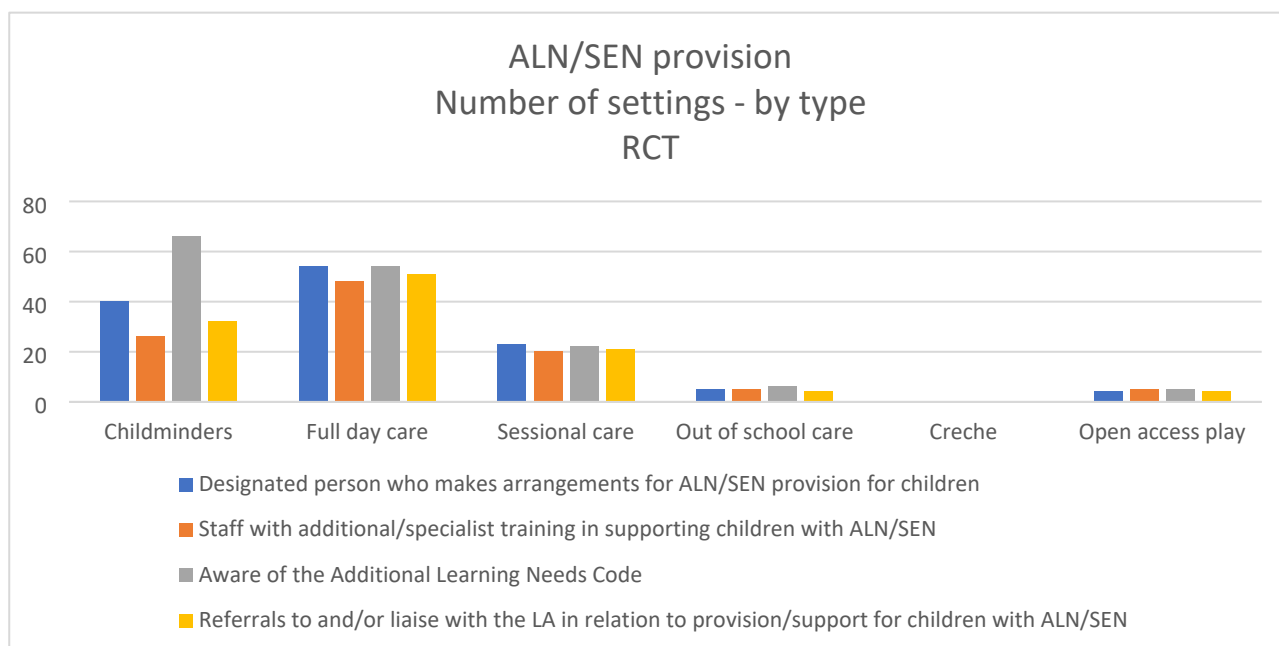
Open access play provision

The provider, based in South West Taf Ely that operates in term time reported in their SASS that they have a waiting list for that service. A waiting list is also noted for play scheme sessions in South West Taf Ely (1), whilst one provider in North Cynon reports that they have vacancies for the same service.

Cater for children with disabilities

68.7% of Childminders who submitted their SASS stated that they are aware of the ALN Code (compared to 92.8% of full day care providers and 88% of sessional care providers). However, only 27% stated that they have staff trained to support children with ALN/SEN (compared to 85.7% of full day care providers and 80% of sessional care providers). Only out of school care settings based in North East Taf Ely and South West Taf Ely reported that they have a designated person who makes arrangements for ALN/SEN provision for children, have staff that have received additional training or are aware of the Additional Learning Needs Code. Engagement with out of school settings in other areas would be prudent to ensure that they too know how to support children in their care who have additional learning needs or disabilities.

It can be difficult for all settings to release staff to attend training during the day or early evening. This is especially difficult for childminders as most work on their own. However, since the ALN Lead Officer came into post in January 2021, great progress has been made in ensuring that specialist training is available to all childcare settings at times that are convenient for them. The rise in virtual learning since the pandemic started has helped all settings, but particularly childminders, as this is a much more convenient method of engagement during the weekday.



Charges

Providers were asked to input their fees in their SASS returns, according to whether they charge by an hourly rate, or by session, day, week or term. It is clear by some of the responses that this question was misunderstood by some providers. Therefore, some caution should be used when analysing the rates below.

Childminder

The average hourly rate recorded for childminders ranges from £4.72 to £5.50 per hour. The highest average hourly rate was from the South Cynon area with £6.00 per hour charged for 8-11 year olds. The lowest average hourly rate was £4.00 per hour for under 1 year olds reported in the North Cynon and South East Taf Ely areas. Rates in South East Taf Ely and South West Taf Ely are on the lower side of the range. These are the areas with the highest concentration of registered childminders, so perhaps this is indicative of the competition in the area.

Full day care

The average daily rate for Full day care providers ranges from £34.80 to £47.85 per day. The highest average daily rate was from providers in the North East Taf Ely area with £66.00 per day charged for children one year and under. The lowest average daily rate was £31.07 per day for 2-3 year olds reported in the North Rhondda.

Sessional care

The average sessional rate for Sessional care providers ranges from £6.25 to £22.48 per day. The highest average sessional rate was from providers in the North Cynon area with £31.45 per session. The lowest average sessional rate was £5.50 per day reported in North East Taf Ely. Data was not available for settings in North Rhondda so cannot be compared.

Out of school care

The highest average session rate was from providers in South West Taf Ely with £22.00 per session. The lowest average session rate was £7.00 per session reported in South Rhondda. However, caution must be used with this data, as the level of data submitted was low and the age ranges do not correlate with the ages of children who are cared for in out of school settings (i.e. from 3 years old or minimum school entry age).

Flying Start, Childcare Offer, Early Education

51 settings stated in their SASS returns that they deliver Flying Start, 31 stated they deliver Foundation Phase Nursery education to three year olds and 125 were receiving funding via the Childcare Offer for Wales.

Childcare type	Childminder	Full day care	Sessional care	Out of school care	Open access play	Total
Flying Start	14	26	11	0	0	51
Childcare Offer <i>(currently receiving funding)</i>	55	54	14	2	0	125
FPN education	0	25	6	0	0	31

Flying Start

The highest concentration of childminders offering Flying Start services was in North Cynon (6), followed by North Rhondda and North East Taf Ely (3 each). The highest number of Full day care providers was in North Rhondda (7) followed by South Cynon (5). The highest concentration of sessional care providers was in South West Taf Ely (3), followed by South Rhondda (2). No out of school care providers stated in their SASS that they deliver Flying Start or FPN education.

Childcare Offer

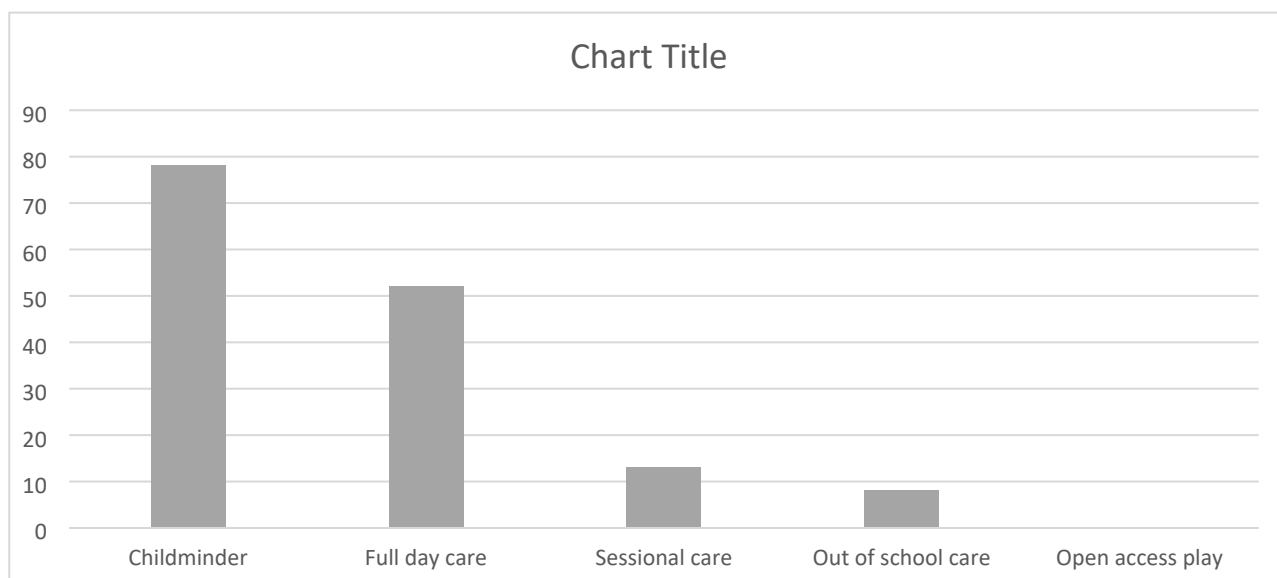
The highest number of childminders delivering the Childcare Offer was in North East Taf Ely (15), followed by South West Taf Ely (12). The highest number of full day care settings was in North Rhondda (11) closely followed by South West Taf Ely (10). The highest number of sessional care providers was in South West Taf Ely (6), followed by North East Taf Ely (3). Only two out of school providers stated that they are currently delivering the Childcare Offer for Wales. This suggests that out of school care settings do not currently offer the holiday entitlement of the Childcare Offer. Encouraging them to do so would provide this service to parents and make it more sustainable for the setting, as parents are accessing funded childcare to use to use the service.

FPN education

The highest number of full day care settings delivering FPN education was in South East Taf Ely (6) followed by North Rhondda and South West Taf Ely (5 each). The highest number of Sessional care settings was in south West Taf Ely (3) followed by South East Taf Ely (2).

Tax free childcare/Childcare vouchers

151 stated in their SASS returns that their parents receive tax free childcare or childcare vouchers to support the cost of fees.



Childminders in South East Taf Ely were the most likely to accept the tax free childcare scheme or childcare vouchers (24), followed by North East Taf Ely (18). Full day care settings in North Rhondda were most likely (11), followed by South West Taf Ely (10). Sessional care settings in South West Taf Ely (6), followed by South East Taf Ely (4) stated they accepted these schemes. No sessional care settings in the Cynon or Rhondda valleys

reported in their SASS that they accepted payment via these schemes. Out of school care settings in South West Taf Ely were most likely (5), followed by one setting each in South Rhondda, North East Taf Ely and South East Taf Ely.

Needs of parents/carers

An online survey was published by Welsh Government and was open for completion during October 2021. This was promoted widely within RCT via childcare settings, schools, and partner agencies. The survey was also available on the Council website and social media, as well as Connect RCT, a community online platform. Officers also attended parent & toddler groups to engage with parents directly.

A total of 823 responses were gathered from families living in RCT. Using the postcode data provided, responses were received from all areas of RCT. Parents in South West Taf Ely submitted the most responses (190), whilst South Cynon submitted the least (138). Of those who responded:

- 93.8% have responsibility for children (771)
- Respondents had a total of 1338 children, with the average family size being 2 children
- 38.7% of respondents had children aged 5 to 8 years old (318), closely followed by 37.8% with children aged under 2 years (310) then 25.3% with children aged 3 years (208)
- 28.3% of respondents had children aged from 9 to 17 years (232)
- 7.4% of respondents have a child with a disability or long term illness (61)
- 9.7% of respondents have a child with a special education / additional learning need that requires additional support with their learning (79)

27.6% of respondents (217) strongly agreed that childcare is a barrier to them accessing employment or training, whilst 21% tended to agree (165). Welsh Government funded schemes such as PaCE (Parents, Childcare and Employment) have supported parents to access training and employment opportunities since it was launched. These responses would suggest that further promotional work is needed to ensure that parents/carers are fully aware of the support available to them.

Parents/carers were asked if they had any issues surrounding childcare in the last year that had affected them. 74% of respondents stated that childcare issues had caused problems at work (417), the most of which were from the South West Taf Ely area (178), followed by South East Taf Ely (145). Although the responses on their own do not identify that the COVID-19 pandemic was the reason for these issues, text responses do suggest that it was a contributory factor.

Childcare currently used during term time

Of those that currently use childcare during term time, 51.8% of parents rely on family and friends (414). Private Day Nursery use was second with 30% of parents using these (240), followed by 24.4% using Before School Club / Breakfast Clubs (195). However, caution must be used with the responses for before school care, as many parents make use of Welsh Government funded free Breakfast Club provision and would class this provision as childcare. Childminders are currently used by 13.9% of parents (111).

Parents in North Cynon and South Cynon reported using the greatest number of hours of childcare during term time. The figures for these areas are significantly higher than the other

areas and the RCT average, so should be viewed with some caution. This is especially so as parents in North Cynon gave the highest responses for not accessing childcare as it is too expensive. This analysis also includes the use of family and friends, not just fee paying childcare. So, it does not give a clear picture of fee paying childcare usage but might explain the reported high number of hours used in North Cynon.

Childcare currently used during school holidays

Again, it is family and friends that respondents state provide their care, with 53.7% stating this is the type of childcare they use during school holidays (417). Private Day Nurseries are again the second most popular type of holiday childcare with 30.2% of parents using these (220). 14.4% stated that they do not use childcare during school holidays (105).

Parents in North Cynon and South East Taf Ely reported using the greatest number of hours of childcare during school holiday periods. Again, this analysis also includes, not only fee paying childcare, but also the use of family and friends, so does not give a clear picture of fee paying childcare usage.

Current childcare costs

30% of respondents reported that they spend £0 on childcare per week (224). This would correlate with the responses that indicate the high reliance on informal childcare with family and friends caring for their children. Of those that do pay childcare costs, 21% stated that they pay between £100 and £199 per week (155). Using the Childcare Offer for Wales rate of £4.50 per hour as an indication, this would buy parents between 22 and 44 hours of childcare per week. This seems to correlate with the average number of hours of childcare that parents told us they use. For those that provided their postcodes, parents in South West Taf Ely are most likely to pay more than £200 per week on childcare costs.

Areas of childcare arrangements that could be improved

When asked if they were unhappy with any aspect of their childcare arrangements, 'more affordable' was the most common response with 50.7% choosing this response (33). 'More hours available' (setting is too busy/full) was next with 27.6% of responses (18), closely followed by 'extending opening hours into the evening' with 24.6% of responses (16).

Parents' perceptions of childcare costs being too high is familiar to the survey responses in the 2017 CSA report. There are many universal schemes, as well as those targeted as specific demographics, available to parents to support them with the cost of childcare, such as Tax Free Childcare, employer based childcare vouchers, the Childcare Offer for Wales, Flying Start and the childcare element of Universal Credit. Increased promotion of these schemes is prudent.

Reasons for not accessing childcare

The biggest reasons respondents listed for not currently using childcare were that it is 'too expensive' (152) and that they use 'informal childcare such as family or friends' (132). The two are likely to correlate with each other in that parents use informal childcare as they feel that fee paying care is too expensive. The next most selected reasons were that the 'childcare available is not flexible enough for their needs' (61) and that the 'times it is available are unsuitable' (47). These findings are similar to those from the 2017 CSA. Although work has been undertaken since then to support the childcare sector to offer more flexible sessions/options and to offer care in atypical hours, there has been limited progress.

Accessing information

The main vehicle for parents to access information is via the Family Information Service. Since the last CSA report, FIS has undergone several changes and there have been limited opportunities for the FIS Officer to attend parent engagement events. When asked to score the statement 'I know where to find out information about childcare', 37.2% of respondents 'tended to disagree' or 'strongly disagree' (294). The pandemic has severely limited face to face engagement with parents. It is not surprising, therefore, that parents may be unsure where to find information about childcare or financial support. The Family Information Service does have a successful Facebook page and content on the main Council website. The childcare development team and the Childcare Offer team also promote childcare options to parents whenever they have face to face or virtual engagement events. Now that restrictions are easing, a renewed emphasis should be undertaken on promoting information to parents and clearly explain where they can find information relevant to them.

Future anticipated need for childcare

Parents were asked about their future plans and whether they were likely to require more or less childcare in the next two years. At the time the survey was undertaken, there was still a high level of home working and disruption to normal working patterns. Therefore, it may have been difficult for parents to accurately predict their childcare needs moving forward. Those that did respond, 51.1% stated that they anticipate requiring more childcare in the next couple of years (405), 24.3% anticipated that their childcare needs will stay the same (193), whilst 13.1% anticipate they will require less childcare (104). 11.3% didn't know or were unsure (90).

Geographical distribution

An analysis of the wards within each area found some geographical gaps in provision. The main types of childcare highlighted in this analysis for further investigation were out of school care and childminding. A lack of registered sessional care providers in North Rhondda and South Rhondda requires further investigation. However, analysis shows that there are several unregistered sessional settings in these areas, so encouraging them to register may resolve any potential gaps in provision.

Housing developments in South Rhondda, South East Taf Ely and South West Taf Ely require monitoring for their impact on childcare needs in these areas over the next five years.

Sustainability

The Council continues to support the sustainability of the childcare sector and to tailor support to meet the needs of childcare providers. This includes funded training courses; childminding start up packages and grant schemes to support new/expansion of provision and severe financial hardship. Over the last two years, there has been additional funding available to support settings deal with the COVID-19 pandemic.

Specific support offered to the sector over the last two years includes:

- New provision grant – to support the development of new services in areas of identified need.
- Expansion of provision grant – to support the expansion of existing settings to offer new services, or increased hours, in response to identified demand.
- New childminder package - to support individuals to become registered Childminders. This includes funded training, PACEY membership for one year and a small start-up grant, as well as individual support from the childcare development team.

- Support with PPE supplies – to support settings with the cost of additional PPE and cleaning materials through the pandemic.
- COVID support grant – to support settings with the reduced income and additional costs caused by the pandemic. The grant was divided into three sections:
 - Full / partial closures – to support providers who had to close their settings due to positive cases amongst staff or children or being unable to meet minimum staffing ratios due to staff self-isolating.
 - Increased costs – to support settings with increased costs associated with the pandemic, such as additional heating, cleaning or uniform costs, or premises related costs due to not being able to open or operate at full capacity.
 - Severe financial hardship – to support settings experiencing severe financial hardship as a consequence of the pandemic and where no other public funding is available to cover the same costs.
- ICT grant – to support providers engage with digital technology in light of the pandemic and in order to prepare them for the roll out of the Childcare Offer digital system later in 2022.
- CO2 monitor grant – to provide childcare settings with CO2 monitors as one of the protective measures to protect against COVID-19.
- Resource grant – to support settings to continue to deliver high quality services by providing them with a range of resources. Seven different resource packs were available, with settings able to select up to three packs each.
- Small capital grant – to support settings make small capital adjustments or improvements to their settings to help them deliver the Childcare Offer for Wales.

COVID-19

In the immediate response to COVID-19, Welsh Government launched the Coronavirus Childcare Assistance Scheme (C-CAS) scheme to provide emergency childcare to key worker families and children who were deemed vulnerable. The scheme ran from April to August 2020, although RCT provided care for some children from 23rd March. In total, 99 childcare providers were funded to support RCT children, 14 of which were settings outside of RCT. 747 children were supported, 95 of which were deemed vulnerable. 223,115 hours of care were funded, costing £1.115m.

An evaluation survey was sent to parents and providers in autumn 2020. In total, 289 responses were received from parents and 46 from providers. 99% of parents were happy with the service they received from the Council (286). All parents were happy with the care that was provided to their children (289). 99% stated that C-CAS enabled them to continue performing their critical role at that time (287), whilst 79% stated that C-CAS enabled them to increase their work hours in order to respond to the pandemic (224). 50% of providers who responded found it 'Very Easy' to find information about the scheme and how to deliver it (23) whilst 44% found it 'Easy' (20). All respondents stated that they found their obligations easy to understand, as was the administration and claim process. All respondents stated that they had sufficient staffing to deliver C-CAS and 91% reported that the scheme had helped their businesses financially (41).

Impact on childcare providers

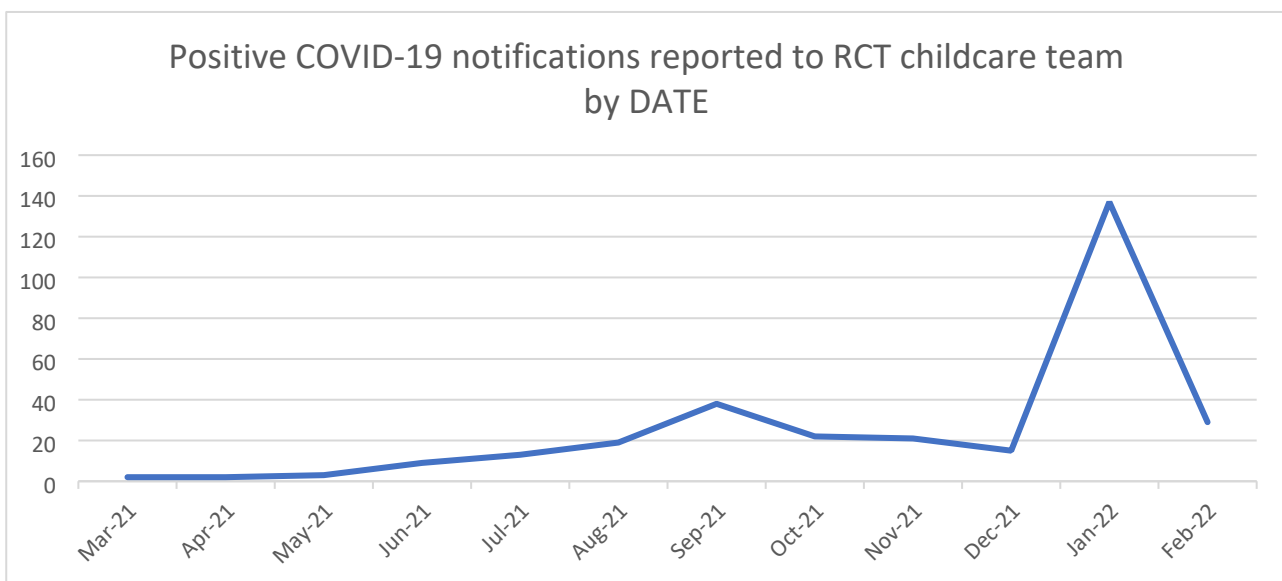
The impact of the COVID-19 pandemic on providers has been profound. Staffing issues and managing positive cases continues to be a challenge, particularly for childminders who are working in their own homes. Positive cases amongst their own family can cause disruptions to delivery of their businesses.

Temporary closures

Since September 2020, CIW has issued weekly updates on the number of setting temporary closures / re-openings. The percentage of RCT settings closed up to December 2020 was just under 50%. Since 2021, this has reduced significantly, with a slight increase in the winter of 2021 as the Omicron variant had an impact on numbers of positive cases.

Cases of COVID-19 in settings

As well as having a duty to inform CIW and Test, Track, Protect, settings were also asked to inform the LA childcare development team of any positive cases, so that officers could offer support and guidance. An online form was created in autumn 2020 and the table below shows the number of positive notifications submitted to the childcare team between March 2021 and February 2022. It must be noted that this is not official TTP data and relied on childcare settings to inform the Council childcare team. Therefore, it does not reflect all cases that have occurred in settings in RCT.



It can be seen that the Omicron variant had a significant impact on the number of positive cases in settings during December 2021 and January 2022. There was also a spike in September, most likely due to the return to school after the summer break.

Effect of COVID-19 on demand for services

It is difficult to evaluate the long term impact of COVID-19 on demand for childcare services. The short term effect has been significant. Parents working patterns have changed, with many now working from home. This has had a detrimental effect on out of school and holiday care providers particularly. The impact of settings closing due to positive cases and staff shortages has also impacted on the confidence of parents to use childcare services, as has the fear of their children contracting COVID-19 in settings and transmitting it to vulnerable members of their families.

The parent survey highlighted the difficulties that parents faced with children not being able to attend childcare settings with little notice, having to self-isolate as close contacts and the limitations on numbers for breakfast and after school care caused by maintaining bubbles. The parent survey that was undertaken in autumn 2021 will not fully reflect the childcare needs of parents as there was still fluidity in the working arrangements of many parents. The 2023 CSA annual action update report will provide a clearer picture of long term issues

with supply or demand of childcare services. The Council will continue to monitor the sector and respond where possible to ensure that services are maintained and viable.

Workforce

The childcare sector in RCT benefits from highly skilled, qualified staff. Work continues to support childcare practitioners to achieve higher qualifications and ensure that regular CPD is encouraged and supported. The Council offers a range of funded mandatory and CPD training to all childcare staff. Changes to qualification requirements in the National Minimum Standards has also placed more emphasis on ensuring a suitably qualified workforce.

For the purposes of this report, data on current qualifications and training of the childcare workforce has been taken from the SASS return data submitted by childcare providers in September 2021. 57.2% of practitioners hold a Level 3 qualification (439). This is the minimum level of qualification for staff that manage or lead childcare settings, as set out in the National Minimum Standards. Work has been ongoing over recent years, particularly amongst Flying Start settings, to ensure that setting leaders are qualified at NVQ Level 4 or QCF Diploma Level 5. 26.3% of practitioners within RCT state that they now hold a Level 5 qualification (202).

As well as statutory training, the Council has made available a number of funded statutory and CPD training opportunities for the childcare workforce in RCT. These include:

- Food Hygiene Level 2
- Paediatric First Aid Level 3
- Safeguarding Level 3
- Health and Safety
- Manual Handling
- Managing Challenging Behaviour
- Supporting children through ACES
- Covid Born Babies
- Positive Attachments
- Fire Warden
- Active Listening
- Additional Learning Needs
- Building Resilience
- Emotion Coaching
- Makaton
- Mental Health First Aid
- Play Therapy
- Resilience, Self-Assessment and Action Plan Building
- Resource Planning
- Risk Assessment
- Understanding Children's Play

Key findings

The principal findings in the 2022 CSA show that there are some geographical areas that require further examination in order to establish if additional childcare is required, particularly areas of North East Taf Ely and South Rhondda. Parents reported that there was limited out of school and holiday care for school aged children. However, many out of school clubs

use shared community venues and were affected by restrictions imposed in response to COVID-19, so this feedback may have been a consequence of that. That said, developing more holiday care is an identified priority within the action plan for this CSA. Supporting the expansion of Welsh medium childcare is another key theme, particularly investigating demand for Welsh medium care in the South Rhondda area. Childminder recruitment also continues to be an ongoing priority and will continue to be so for the duration of this CSA.

Identified actions

The actions below are those identified in the CSA report and form the basis of the overarching action plan for the next five years.

1 - Potential unmet demand – childcare types, location, ages

- Encourage existing out of school care providers to offer holiday care
- Explore demand for ad hoc, flexible care and/or crèche facilities
- Investigate demand for additional childminders in all areas of RCT, but particularly:
 - North Cynon (Hirwaun and Rhigos)
 - South Cynon (Abercynon and Mountain Ash West)
 - North Rhondda (Ferndale and Treorchy)
 - South Rhondda (all wards)
 - North East Taf Ely (Treforest)
 - South East Taf Ely (Rhydyfelin/Central Ilan)
 - South West Taf Ely (Gilfach Goch, Llanharan and Tonyrefail East)
- Investigate demand for additional out of school care services (after school and holiday) in all areas of RCT
- Investigate demand for additional full day care in North East Taf Ely
- Monitor impact of housing developments on childcare needs, particularly in:
 - Llanilid (Brynna)
 - Llantwit Fardre
 - Penygraig
- Support unregistered Sessional care providers to register with CIW and investigate demand for additional Sessional care services in:
 - North Cynon
 - South Cynon
 - North Rhondda
 - South Rhondda

2 - Welsh medium childcare provision

- Engage with, and support, unregistered Welsh medium out of school care providers to register with CIW and extend services to provide holiday care in areas of identified demand
- Explore the demand for new Cylchoedd Meithrin in geographical areas identified via the mapping exercise
- Investigate possible gaps in Welsh medium sessional and full day care in South Rhondda
- Offer support and training to non-confident Welsh speakers to encourage use of the Welsh language in their settings and to promote themselves as Welsh medium or bilingual settings.
- Promote the Active Offer to settings and encourage participation
- Promotion campaign to attract more Welsh speaking childminders
- Support the aims of the WESP to increase transition rates from Welsh medium childcare to Welsh medium education

3 - Affordability of childcare

- Continue to promote the financial benefits of the Childcare Offer, particularly emphasising the holiday entitlement
- Support childcare providers to accept payment via the Tax Free Childcare scheme or employer based childcare vouchers
- Work in partnership with FIS to promote childcare options and financial support to parents

4 - Children with special educational needs or disability

- Explore demand for holiday care for children with additional needs or a disability
- Identify opportunities to improve access to childcare and early years provision for children with additional learning and physical needs
- Increase awareness of ALNET and setting responsibilities to children and their families
- Offer diversity training to childcare providers to improve inclusivity within settings

5 - Support for the childcare sector

- Continue to offer grants to support new provision or expansion of existing provision, and to support settings experiencing severe financial hardship
- Encourage all settings to register with FIS and keep their accounts up to date
- Explore how providers can be supported to offer more flexible care that can accommodate shift patterns and ad hoc demand
- Improve engagement with nannies already on the Home Childcare Provider scheme
- Promote childminding as a career, clearly highlighting the support package on offer to prospective childminders
- Promote the benefits of accessing regulated childcare to a child's wellbeing and development
- Promote the Home Childcare Provider scheme to parents; promote the benefits of registration to them, and to existing nannies not on the scheme
- Support sector to prepare for, and engage with, the rollout of Flying Start to all two years
- Support settings to market their services effectively, particularly unique selling points, such as additional languages, or flexible, ad hoc or atypical services.

6 - Quality and governance

- Engage with unregistered out of school care and sessional care providers; encourage and support them to register with CIW
- Improve the quality of childcare settings beyond the CIW National Minimum Standards
- Promote benefits to parents of using CIW registered childcare services.

7 - Atypical hours/ad hoc demand

- Explore usage of ad hoc places and encourage settings to offer more flexible contracts
- Undertake further consultation to establish demand for childcare in atypical hours, notably before 8am or after 6pm weekday, weekends and overnight care.

8 – Workforce development

- Ensure practitioners have access to relevant statutory and CPD training opportunities

- Promote ALN and inclusion training; improve access to training, particularly for childminders
- Work in partnership with schools and colleges to offer transition routes into the childcare sector for school leavers, particularly Welsh medium students