

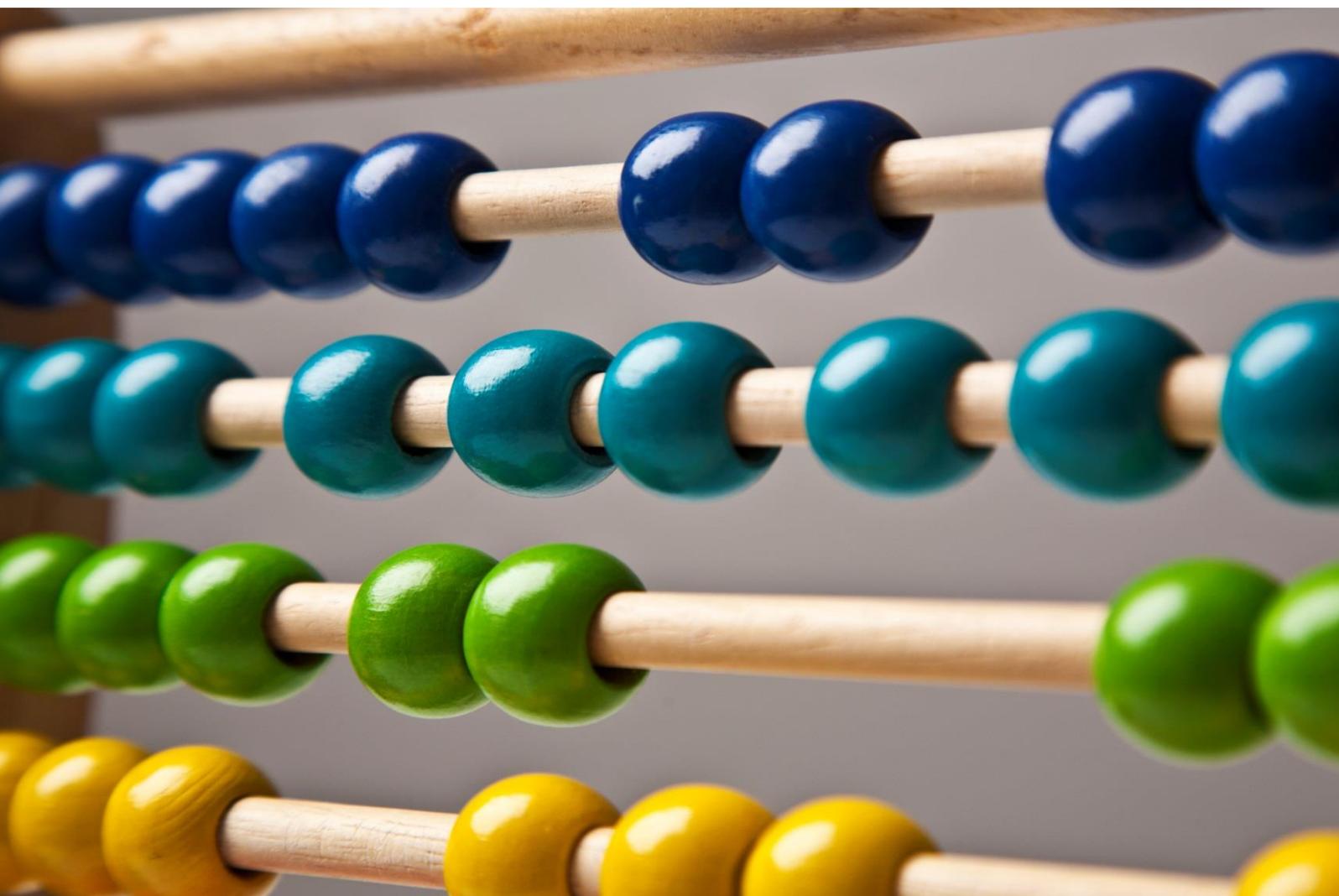


STIRLING COUNCIL

CHILDCARE SUFFICIENCY ASSESSMENT 2016

Executive Summary

October 2016



What is a childcare sufficiency assessment?

The purpose of a Childcare Sufficiency Assessment is to establish the extent to which local childcare provision meets the needs of working parents or those who want to get back to work or develop their skills through education and training. There are **nine key benchmarks of sufficiency**:

- 1. There are sufficient places overall** and in each learning community, having regard to demographic trends, travel to work and employment patterns.
- 2. There is sufficient flexibility** with places being available at the right times to fit parents' working patterns.
- 3. Places are sufficiently accessible**, so that parents do not have to travel too far out of their way to access childcare which meets the needs of their child.
- 4. Childcare places are of high quality** - reflecting judgements made by Education Scotland, the Care Inspectorate and parents.
- 5. There is sufficient range of provision** with the balance between sessional and full day care appropriate to meet the needs of parents identified through the assessment.
- 6. There is sufficient knowledge and information** about the supply and quality of places and how to access them.
- 7. Childcare places are sufficiently affordable** for parents to use the level of childcare they require.
- 8. Childcare places are sufficiently inclusive** and meet the individual needs of all children from every community.
- 9. Childcare places are sufficiently sustainable** in the long term.

This assessment covers childcare provision **registered with the Care Inspectorate** and delivered by day nurseries, registered childminders, pre-school playgroups, schools crèches and out of school clubs/schemes.

Acknowledgements

Stirling Council would like to thank all those who gave up their valuable time to contribute to The research underpinning this assessment; your input is very much appreciated.

What did the assessment find out?

This executive summary provides an overview of the childcare sufficiency assessment; for details of all findings please see the full report.

Below we highlight the key priorities identified, followed by an overview of the evidence base.

Key priorities going forward

The following points are identified as key priorities for improving sufficiency:

1. Improve access to out of school and holiday childcare in all communities and particularly in McLaren.
2. Increase the proportion of pre-school and breakfast provision available before 8:00 AM.
3. Increase the proportion of free entitlement places available on a full day-care/extended basis across all communities and particularly in Bannockburn.
4. Shift the balance of sessional care supply to morning sessions across all communities.
5. Improve affordability across all types of care and particularly for under 2s, taking into account the forthcoming impact of Universal Credit and Tax Free Childcare.
6. Improve the supply of information on childcare options, particularly in McLaren.
7. Ensure ongoing monitoring and evaluation of childcare supply and demand in the context of a rising child population and extended free entitlement, and in particular, address existing data gaps on childminder numbers at local level.
8. Conduct research into childcare provider delivery costs and funding levels to evaluate economic viability and capacity to deliver a 1,140 hours childcare offer.
9. Carry out further qualitative investigation of the childcare requirements of children with additional support needs.

Approach

The research and consultation process has involved household surveys of 875 families reporting the detailed childcare arrangements and preferences of 1,520 children aged 0 to 14 years or up to 18 for children with a disability; a survey of local childcare providers and employers and desk research on social and economic trends.

The policy context

Free provision of early learning and child care is offered to all 3 and 4 year olds, as well as eligible 2 year olds in Scotland. The current entitlement is 600 hours per year, equivalent to around 16 hours per week if delivered during school term time. The Scottish Government has committed to increasing the early learning and childcare entitlement to 1,140 hours per year by 2020 for all 3 and 4 year olds and eligible 2 year olds. This will bring new pressure to the childcare market.

The introduction of 'Tax Free Childcare' across the UK in 2017 aims to improve affordability of childcare for working households. There are fears however, that changes to the welfare system in the introduction of Universal Credit may make childcare less affordable for some families.

The Stirling area

Stirling is located in Central Scotland, bordering the council areas of Clackmannanshire to the east, Falkirk to the south east and Perth and Kinross to the north and north east. A total of 92,980 people live in the Stirling Council area (July 2016), with the largest proportion living in the city of Stirling (36,440). This assessment evaluates childcare sufficiency across the borough and within six learning communities defined by high-school catchment areas.

Stirling is growing: the population aged 0 to 4 years and 5 to 9 years is set to increase to 5,299 and 5,126 children respectively by 2026, further increasing childcare demand. The 10 to 14 age group is expected to see a small decline over the same period to 4,905 children.

Work patterns of surveyed parents

- One in five parents surveyed in Stirling were lone parents (20%). A third of lone parents were looking after children and family full time at home (33%), 32% were in part time work up to 29 hours per week and 14% worked 30 hours or more.
- In two parent households the most common pattern is one partner working 30 hours plus and one partner working less than 30 hours (46%). This is followed by both parents working 30 hours or more a week (28%). A very small minority of households in the sample were workless (1%); this reflects Stirling's low unemployment rate.
- More than one third of households (36%) had a parent working after 6pm in the evening and 24% of all households had a parent working before 8:00 am in the morning. Over one in ten (13%) lone parents work weekends and one parent in 11% of two parent families did so. All being work patterns outside the scope of most childcare supply.

Current use of formal childcare

- Due to the universal free entitlement childcare use peaks for children aged 3 to 4 years with 94% of all children using at least one type of registered childcare. Use is also

relatively high amongst 2 year olds at 79%, falling to 30% of under 2s. Use declines sharply after 12 years of age as children become more independent.

- The most common form of provision for children aged under two years was day nursery provision (25% accessed this care). Schools play a relatively minor part of the supply mix for two year olds (14%), but deliver a substantial share of the market for children from three years upwards (46%).
- One in ten children aged 5 to 11 years made use of registered holiday provision, whilst use of breakfast (19%) and after-school clubs (20%) was more prevalent.
- Use of registered provision was narrowly lowest for households in Stirling (58%) closely followed by Dunblane and peaking in Wallace (68%) and Balfron (70%).
- Lone parents in work (71%) and dual earner households (73%) are most likely to be using registered childcare.
- Feedback from the survey suggests that there is little difference in the use of registered childcare by children with additional support needs (55%) and those without additional needs (57%). It is noted however that the sample size is relatively small (81 children) and needs were wide ranging, from global development delay to diabetes.
- The majority of parents use care in order to work (86%), train (12%) and/or benefit their child (28%).

Parent opinions on childcare supply

- Two fifths of parents agreed with the statement that there was enough choice in childcare provision locally (41%); agreement was notably lower in Balfron (34%) and McLaren (27%). Almost two thirds of parents in McLaren (61%) disagreed that they had enough choice.
- Only 39% of parents in the borough agreed that services were available at the times required, and slightly less than a third (32%) agree that childcare is flexible enough to meet their changing needs.
- Almost one third of parents across Stirling (30%) disagreed with the statement that they could access all the childcare their family required. Parents in McLaren (41%) and Balfron were most likely to disagree (38%).
- All communities find the affordability of childcare an issue, as indeed, do many families across the country.¹ McLaren again has the highest negative ratings on this key aspect of sufficiency with 71% of parents saying they disagree that childcare is affordable.
- The majority of parents had **very positive perspectives** on childcare quality with 75% agreeing with the statement that services are of good quality, 22% having no opinion and only 3% disagreeing. The latter figure rises to 8% in Balfron.
- Linked to quality, parents also expressed their opinions on whether childcare services could meet the individual needs of their child/ren. Disagreement was relatively low across all communities and again peaked in McLaren with 16% of parents disagreeing that childcare could meet the individual needs of their child.

¹ [HOUSE OF LORDS Select Committee on Affordable Childcare Report of Session 2014–15 Affordable Childcare](#)

- Whilst 60% of parents in Bannockburn agreed there was enough information available on childcare choices this fell to almost half the proportion of parents in McLaren (33%). A review of how childcare choices are communicated to parents would be beneficial on the basis of this feedback.

The views of businesses

- Only two of the 79 local employers surveyed identified childcare as having been a barrier to staff recruitment and a further two identified childcare being a barrier to managing effective performance at work. The majority of businesses (93%) said that childcare had not impacted negatively on the business.

Childcare supply and demand

To measure sufficiency, it is necessary to establish the types of childcare arrangements parents would choose to use, regardless of accessibility, quality and ability to pay etc. since it is these very barriers that we are looking to assess. Demand has been measured via a large-scale household survey.

The figures presented are not predictions of the numbers of places that will be taken up in future, they show maximum childcare demand if all parents IDEALLY wishing to use care actually did so.

Measures of supply have been sourced from a survey of registered childcare providers in summer term 2016, management information held by Stirling Local Authority and published data sources. The audit covered childcare provision **registered with the Care Inspectorate.**

All data is presented as Full Time Equivalent (FTE) places defined as follows:

- Day-care/sessional provision: A FTE place is defined as five full days (attending morning and afternoon) per week.
- Holiday provision: A FTE place is defined as five full days (attending morning and afternoon) per week.
- Breakfast provision: A FTE place is defined as five breakfast sessions per week.
- After-School provision: A FTE place is defined as five after-school sessions per week.

Non-domestic childcare supply

- A total of sixty-six *non-domestic* childcare providers were identified via Care Inspectorate and Local Authority information as located within the Stirling LA boundary including nursery and primary schools, day nurseries, playgroups, out of school clubs and crèche provision.
- There is a total of 1,906 FTE day/sessional care places, 371 breakfast club places, 507 after-school club places and 388 holiday places across the Borough.
- Wallace has the largest supply of FTE pre-school places at 492, followed by Stirling (424), Bannockburn (254), Balfron (253), Dunblane (243), and McLaren (241).
- Stirling has the highest supply of after-school (180) breakfast (103) and holiday provision (107), followed by Dunblane and Balfron. McLaren has no out of school provision – a significant supply gap.

- Occupancy levels compare well with those for the wider sector in Scotland recently estimated as an average 77%.² Levels in Stirling averaged 69% for under 2 and 2 year old places and 84% for 3 to 5 year olds. Breakfast provision averaged 68% and after-school provision 91% - the latter confirming pressures on after-school provision.

Childminder provision

- It is estimated that a total 139 childminders are registered and resident in the Stirling area of whom 133 are active. Analysis is not possible at local level due to lack of address data: a significant data gap in terms of monitoring supply.
- The National Care Standards stipulate that childminders can care for no more than six children under the age of 12 at any one time. Of these six children, no more than three should be pre-school age and no more than one should be under the age of 12 months.
- Most childminders offered their services to pre-school children five days a week (85%), some operated four days a week (10%) and a small proportion worked just three days a week (2%). No surveyed childminders in Stirling were offering provision on Saturdays, Sundays or overnight.
- With the exception of one surveyed childminder, all active childminders were caring or prepared to care for children of pre-school age. Most (76%) were prepared to care for children across the full age range of under one year to five years of age.
- Almost one in two childminders (47%) were prepared to offer out of school provision for school-aged children; one in ten were prepared to offer out of school care across four days of the week (10%) and 37% offered care across five days a week.
- Of those childminders offering out of school provision, most were prepared to offer care to the four to ten years age group after which services dropped significantly. This reflects the tail off in use of registered provision in the 12 plus age group noted in the analysis of current childcare use.
- Six of the surveyed childminders offering out of school care were prepared to offer care to children aged 15 plus with additional support needs.
- Estimated childminder capacity across the borough is 158 FTE places for under 2s, 126 FTE places for 2 year olds and 173 FTE places for 3 to 5 year olds.
- Estimated out of school capacity is 101 FTE breakfast places, 107 after-school places and 152 FTE holiday places.

Is supply sufficient to meet the needs of different ages?

- Looking at the total volume of day and sessional care for pre-school children, supply is reasonably well matched to overall levels of demand; however this masks a gap in provision for under 2s, where parents' *ideal childcare arrangements* would outstrip

² NDNA Scotland Annual Nursery Survey 2016

supply in non-domestic provision, this being partly off-set by over-supply in childminder places. Demand outstrips supply for breakfast and after-school provision in all cases.

Is the range of supply sufficient to meet parents' preferred choice of childcare provider?

- Supply of day and sessional care for all types of pre-school children meets or exceeds demand in McLaren, Balfron and Wallace. There is under-supply in all pre-school care types in Stirling; this is likely to be linked to travel to work patterns. Parent preference would indicate a shortfall in nursery class provision in Bannockburn and Dunblane.
- If parents had no barriers to taking up breakfast and after school care, demand would far out-strip supply in all areas with the exception of Balfron where there is sufficient breakfast provision to meet latent demand.
- It is noted that supply is further supported by a mobile crèche service managed by the Local Authority which offers flexible staffing and ad-hoc childcare provision to meet specific needs.

The free entitlement

- There was a relatively even split between parents who wanted to access the free entitlement for 3 and 4 year olds in term time only (51%) and throughout the year (47%); a small minority did not want to access the entitlement for their child.
- Over two fifths of families wanted to access the 3 and 4 years entitlement across full days (43%). Morning sessions were considerably more popular (41%) than afternoons (16%) for those looking for sessional care.
- For the two year old entitlement there was a preference for full days (69%) in term time (61%) but it is noted case numbers are small.

Holiday care

- Demand peaks for the February half term at 868 FTE places, summer demand is close behind at 839 FTE followed by Easter (721 places) October half term (699 FTE places) and Xmas (302 FTE places). Places are adjusted for the number of weeks families would like to use care in the longer holidays. There is also significant demand for care on teacher in-service days; 1,229 children would like to access care on these days.
- In terms of supply Dunblane fares best with the current supply of 100 places exceeding estimated demand in all periods except in service days. Bannockburn has very limited supply and high demand, it having the second largest population of school aged children in Stirling.
- Demand exceeds supply in all holiday periods in Wallace, with a modest supply of 55 places and the largest school-aged population. Whilst Stirling has the largest supply, it is still lower than demand for all holiday periods with the exception of the Xmas break. McLaren has amongst the lower levels of demand with the exception of the February

holiday, but no supply at all within the learning community boundary – a significant sufficiency gap.

Timing of care in non-domestic provision

- There is a preference for full day-care: on average parents wishing to use a nursery class for example, were looking for an average of 7.30 hours care. Parents sought longer hours in day nurseries and the longest sessions with childminders (9.15 hours).
- There is a very clear preference for morning sessions; a factor noted in Stirling Council's nursery school admission guidance.
- The vast majority of schools (17) offer extended provision, however not all places within these settings are offered on this basis. Dunblane is best served in terms of the proportion of its day-care being offered on a full or extended day basis (81%), followed by Wallace at 73%. Bannockburn fares worst with almost half of its places offered on sessional basis only – an issue for working parents.
- One in five pre-school places in non-domestic provision are offered before 8:00 AM and no such provision is available in Wallace and Bannockburn. There is a clear demand for earlier opening hours in order for parents to meet work commitments and this is flagged as a sufficiency gap for these communities, where choice may be confined to childminder provision.
- Later closing times are better accommodated than early mornings. Almost two thirds of FTE places are offered up to or later than 17:00 PM; and 39% are offered up to or later than 18:00 PM.
- On average parents were looking for less than one hour's care in a breakfast club and two hours thirty minutes in an afterschool club. The average duration between preferred start and finish times for holiday care (7 hours 45 minutes) and care on teacher in service days (eight hours and 45 minutes) amount to full day-care.
- Very few places are available in any community for breakfast provision before 8:00 AM. One in five parents (20%) using or wishing to use such provision, needed care before this time.
- Again, later opening times are better catered for- all after-school and holiday places were offered beyond 17:00 PM and most, with the exception of some provision in Wallace, were open up to 18:00 PM.

Timing of care in childminder provision

- A small proportion of childminders offered care earlier than 7:00 AM in the morning (6%) to meet parent's specific needs; the most common start time was 8:00 AM. The most common finish time was 18:00 PM (58%) – similar to private day nursery provision. Greater flexibility was evident in domestic provision, with some settings operating until 19:00 PM on weekdays to meet individual needs.

Care at nights and weekends

- A very small minority of families (1%, 9 families) wished to use day nursey provision at the weekend. This feedback would suggest a weekend operation is unlikely to be viable for non-domestic providers. The same applies for overnight care with four families needing care in the evening/overnight.

Is the care available of a high quality?

- Parents had very positive perceptions of childcare quality and Care Inspectorate grades for non-domestic providers are strong. Almost one in five (19%) providers received an 'excellent' grade for support and just under two thirds received a 'very good' rating.
- The highest grade of 'excellent' was awarded to 8% of providers for the quality of the environment and 63% received a 'very good' grade.
- In the staffing category, 12% of providers received an 'excellent' grade, 55% were rated 'very good' and 28% received a 'good' grade.
- More than one in ten (15%) of all providers received an 'excellent' grade for management, 55% received 'very good' and 26% were rated as 'good.'
- Most inspection ratings for childminder provision are in the 'very good' to 'excellent' grades including 72% of ratings for support and the environment (72%).

Barriers to ideal care arrangements

- Parents identified no barriers to accessing their preferred childcare options for one in three children covered by the survey (32%).
- Cost was by far the most common barrier to accessing preferred options, impacting on one in four children across Stirling (25%). Lack of care in the appropriate location was an issue for 8% of children.
- Whilst 1% of the total sample said childcare could not meet their child's additional support needs this rose to 12% for children whose parents identified an additional support need.
- Lack of care in the right *location* was reported as an issue by parents of 119 children in the sample (8%). This was most likely to be an issue for parents seeking out of school provision for school-aged children (81%), rather than pre-school care (19%), and was reported across all areas.
- Almost two fifths of households surveyed (38%) did not include any formal registered provision in descriptions of their preferred childcare arrangements. The most common reasons were that the family preferred to care for the child themselves (37%) or keep care within the wider family (22%).

- Almost one in five of all female respondents said childcare had been a barrier to work or training (19%) and 11% of male respondents said this was the case. For lone parents the figures were 33% and 17% respectively.
- Parents in a relationship said their partner's economic activity had been negatively impacted by childcare difficulties in just over one in ten cases (12%).

Is childcare affordable?

- Cost is the most commonly reported barrier to taking up childcare impacting on one in four children across the borough.
- The average charge per day for under 2s was £42.58, reducing to £41.23 for 2 year olds and £36.77 for 3 to 4 year olds. There is a considerable difference between the lowest and highest fees for all types of sessions and for all age groups, particularly with regards to the fees for morning/ afternoon sessions. Childminder fees rarely varied by age, averaging £4.08 an hour for day-care, or £39.55 a day.
- Parent awareness of help with childcare costs was highest for Child Tax Credit (97%) and lowest for employer voucher schemes (50% aware). Two fifths of parents reported claiming child tax credit, whilst only 10% reported claiming the childcare element of working tax credit. Employer childcare vouchers were a benefit used by few parents.

Childcare provider's views

- There is a good deal of uncertainty for providers at the present time in terms of the future expansion of funded provision. Most providers giving an opinion identified benefits for parents in the introduction of a 1,140 hour offer, seeing it as a catalyst for encouraging parents back to work or increase their working hours. Relatively small numbers felt it could help increase (n=7) and smooth out peaks and troughs in occupancy (7).
- Others had concerns regarding the shortage of staff with necessary qualifications (10), skills and experience (10) to meet the increase in capacity required, and some predicted recruitment difficulties due to uncompetitive pay and rewards (11). Concerns around funding rates (6) and the financial impact on settings (5) were also evident.

The key priorities identified in the assessment are outlined on page three of this summary, and full details of all research findings are available in the main report.

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