



Childcare Sufficiency Assessment Form

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1. Introduction

Conducting the Assessment – Childcare Sufficiency Assessment

As well as establishing a baseline of provision, the Childcare Sufficiency Assessment will enable Local Authorities to:

- measure the nature and extent of the need for, and supply of, childcare in the area
- identify gaps in the market and plan how to support the market to address them

A template has been produced to support a corporate appraisal of the matters that need to be taken into account as set out in the Statutory Guidance.

The Childcare Sufficiency Assessment must demonstrate that the Local Authority has taken into account and assessed the matters set out in The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016 and the Statutory Guidance.

Principal Statement

The Local Authority has a statutory duty under The Childcare Act 2006 to ensure there is sufficient childcare to meet the needs of working parents; to undertake Childcare Sufficiency Assessments; and to provide information, advice and assistance relating to childcare through the Family Information Service.

The mission statement of Monmouthshire County Council is to create sustainable and resilient communities; this is broken down into three specific themes:

- Nobody is Left Behind
- People are Confident, Capable and Involved
- Our County Thrives

In order to achieve this, the Local Authority recognises the importance of high quality childcare provision that is flexible and accessible.

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1. Introduction/ Context

Monmouthshire Family Information Service holds details of all childcare provision throughout Monmouthshire, both registered and unregistered. This information, combined with CSSIW data which was collected through providers' SASS returns, was used to inform the childcare supply sections of this Childcare Sufficiency Assessment (CSA). An online survey was used to consult with parents in order to gather their views on childcare in Monmouthshire, to analyse how it is used currently, to identify possible barriers to using childcare and to assess future demand for childcare. Relevant stakeholders and other Local Authority departments have also been consulted with and their views have been incorporated within this document.

Prior to submission, the Childcare Sufficiency Assessment will be shared with colleagues within the Children & Young People's Directorate and members of the Early Years Development & Childcare Partnership. It will also be shared with County Councillors and approved by Cabinet members. Following this, the CSA will be available for public consultation on both the Local Authority website and Monmouthshire's FIS website, before being submitted to Welsh Government.

The key challenge in undertaking this CSA was ensuring the accuracy of data, as the response rate to the parental questionnaire was minimal and only 70% of registered childcare providers completed their SASS return. Therefore, additional information was collected from unregistered childcare providers and those that were unable to complete their SASS return and this data was included within the CSA. Nevertheless, the data included within the annexes is incomplete as many providers didn't answer some of the questions within their SASS return and it is evident that some questions have been interpreted in different ways by different providers.

The actions identified in the CSA action plan will form the basis of our Early Years' Service Improvement Plan for the next five years and progress made against these targets will be monitored and reported on a quarterly basis. Funding available through the RSG and external grant funding will be allocated to address these priorities.

2. Partnership Working and Consultation

Consultation questionnaires were sent out to all relevant stakeholders to obtain their views on the demand, supply and quality of childcare provision throughout Monmouthshire. They were also asked their views on how the needs of vulnerable groups are met and any improvements they consider necessary.

The South East Wales Safeguarding Children Board felt that they were not in a position to comment on childcare provision specific to each Local Authority within their region; however, they did provide the following response in relation to the safeguarding training available for childcare workers in South East Wales: “South East Wales Safeguarding Board provides a programme of multi-agency safeguarding training which is available across the whole region, this would of course include access for those providers that make up the childcare workforce. The Board agreed training strategy is available on the www.sewsc.org.uk website which attempts to match training participants with job competency, so this should enable professionals to closely match their training requirements with the courses on offer”.

A representative from Early Years is a member of the Welsh Medium Education Forum and increasing the provision of Welsh medium childcare settings is included within the Welsh Education Strategic Plan (WESP), hence this is discussed at most forum meetings. The Childcare Sufficiency Assessment was included on the agenda at the meeting held in the summer term and this was followed up by a questionnaire so that members of the forum could respond on behalf of the individual organisations that they represent. These views have been used to inform the CSA Action Plan, as well as fed into the WESP.

There is a childcare representative on the Play Monitoring Group; unfortunately there was not a meeting during the consultation period so it was not possible to discuss it as an agenda item. A questionnaire was circulated to all members of the Play Monitoring Group to give them an opportunity to provide their views and these have been used to inform the CSA. Any relevant gaps highlighted by the Childcare Sufficiency Assessment will be fed into the Play Sufficiency Assessment and we will work closely with members of the Play Monitoring Group to address these issues, particularly in relation to open access play provision and holiday play schemes.

In the past, a Job Centre Plus representative attended Early Years Development and Childcare Partnership (EYDCP) meetings and supplied us with data to inform the Childcare Sufficiency Assessment. Unfortunately, there have been numerous staffing changes over the last few years and Job Centre Plus have not attended the most recent EYDCP meetings. Despite several requests for information, no response was received, so it has not been possible to include this detail within the CSA.

The majority of childcare umbrella organisations are represented on our Early Years Development and Childcare Partnership and we have good working relationships with them. Several of these organisations receive a small amount of funding to provide support to their member settings and we work together to agree and monitor targets. The Childcare Sufficiency Assessment was discussed at several EYDCP meetings and all umbrella organisations completed a questionnaire with their views on childcare in Monmouthshire as part of the consultation process. These views have been taken into consideration and used to inform the CSA; any gaps highlighted and actions identified will be discussed with the umbrella organisations and future funding will be targeted accordingly.

The Family Information Service is a valuable source of information and this has been used in conjunction with the SASS returns and the parental surveys to inform the supply and demand sections of the Childcare Sufficiency Assessment; the completed CSA will be published on the FIS website so that it is accessible to parents/carers, childcare workers and other professionals.

All neighbouring Local Authorities, both colleagues dealing with Early Years Education and Family Information Officers, were consulted with to establish the demand for childcare outside of Monmouthshire. This information is summarised and included within the Cross Border section of this report (section 12).

Other stakeholders that were consulted with included schools and other Local Authority departments such as Planning, Healthy Schools and Monmouthshire Housing Association. This consultation took the form of questionnaires, emails and face to face discussions. Local employers were also contacted using a list held centrally by the LA Communications team and several completed an online survey. Although the number of responses received were limited, it provided an insight into barriers that are faced by parents returning to work and the range of childcare services that are required to meet their needs.

Finally, focus groups were held with children aged between 4 & 11 years attending out of school childcare provision. A total of 142 children were consulted with as part of this process to ascertain their views on their childcare provision, reasons why they attend and any improvements they would like to see. On the whole, these responses were very positive and supported the general view that the quality of childcare in Monmouthshire is of a high standard.

3. The Childcare Sufficiency Assessment and Local Well Being Needs Assessment

Prior to completion of this Childcare Sufficiency Assessment, discussion took place with members of the Public Service Board who are responsible for carrying out the Local Well Being Needs Assessment on behalf of Monmouthshire County Council.

The Local Well Being Needs Assessment has been divided Monmouthshire into five areas:

- Abergavenny
- Caldicot
- Chepstow
- Monmouth
- Usk & Raglan

In order to ensure consistency and to contribute to the Local Well Being Needs Assessment, the same five areas have been used within the Childcare Sufficiency Assessment.

A great deal of consultation has already taken place with Monmouthshire residents to inform the Local Well Being Needs Assessment and childcare has not been raised as an issue or concern by any of these residents. However, consultation also took place at the army barracks that is situated just over the border in Gloucestershire, as many of the families access services in Monmouthshire as Chepstow is their nearest town. Some of these families did raise childcare as an issue as, in many cases, they don't have family nearby to provide childcare support. In particular they required crèche type facilities in order for them to attend appointments, go to the gym and so on. These views will be taken into consideration as part of the Childcare Sufficiency Assessment.

Any gaps highlighted through the Childcare Sufficiency Assessment will be fed into the Local Well Being Needs Assessment.

4. Population

Monmouthshire is situated in South East Wales and it occupies a strategic position between the major centres in South Wales and the South West of England and the Midlands. It is close to the big cities of Cardiff and Newport, sits on the M4 corridor towards Bristol and is on the edge of the Heads of the Valley. It is a largely rural authority and forms part of the Wye Valley Area of Natural Beauty. It borders six other local authorities, four in Wales (Torfaen, Newport, Blaenau-Gwent and Powys) and two in England (Herefordshire and Gloucestershire). It is considered to be one of the most affluent local authorities in Wales.

Unless stated otherwise, the demographic information included within this document is based on data from the Census 2011, along with more recent population estimates produced by Welsh Government. This is the same information that has been used by the local authority to develop the Local Well Being Needs Assessment.

Population Figures

The population in Monmouthshire has been steadily increasing over the past 25 years, as has the population of Wales as a whole. The census data shows that the county of Monmouthshire had a population of 91,323 in 2011 and recent data shows that in 2015 the population had increased by 1.26% to 92,476. This is expected to increase still further reaching 93,341 by 2021 and 93,925 by 2029, before slowly decreasing. Projections indicate that the population will have reduced to 92,452 by the year 2039.

At the time of the last census in 2011 there were 18,871 children in total within the 0 – 17 age bracket, this was 20.66% of the total population. It is projected that this number will have increased by 2016 and will increase again by 2021. Nevertheless, projections suggest that Monmouthshire has an aging population and, if current trends continue, this will reduce to around 18.7% by 2039.

Age Range	2011 Data	Projected for 2016	Projected for 2021
0 – 2	2,714	2,760	2,769
3 – 4	1,923	1,932	1,938
5 – 7	2,852	2,852	2,861
8 – 10	2,957	2,944	2,954
11 – 14	4,646	4,600	4,615
15 – 17	3,779	3,864	3,877
Total	18,871	18,952	19,014

Live Birth Rates

There were 796 live births in Monmouthshire between 1st September 2015 and 31st August 2016; this can be broken down into areas as follows:

Abergavenny – 177

Caldicot – 202

Chepstow – 242

Monmouth – 121

Usk & Raglan – 54

This figure is 3% lower than was reported in the previous Childcare Sufficiency Assessment in 2014.

As of September 2016, there were 4,840 children in Monmouthshire's Secondary Schools (an increase of 75 pupils from the previous year) and 6,558 children in Monmouthshire's Primary Schools (an increase of 18 pupils from the previous year).

Children with a Disability

There are 125 disabled children in Monmouthshire registered with the Children with Disabilities Team; this includes 67 children on the Disability Index (as at 31/10/2016).

During the Summer Term 2016, Monmouthshire Early Years section funded additional support to enable 25 children with additional needs to attend pre-school settings and 11 children with additional needs to attend after school clubs and holiday clubs.

There are 1,029 children with minor and major disabilities or developmental delays in Monmouthshire primary schools (508 SA, 407 SA+ and 114 statemented); this is exactly the same as the previous year. There are 864 children with either major or minor disability or developmental delay in Monmouthshire secondary schools (515 SA, 210 SA+ and 139 statemented); this is an increase of 112 children compared to the previous year.

Vulnerable Children

As of June 2015, there were 395 children in need in Monmouthshire (20 aged under 1, 65 aged 1-4 years, 115 aged 5-9 years, 150 aged 10-15 years and 45 aged 16-17 years).

As of October 2016, Monmouthshire County Council had 118 looked after children, broken down into the following age ranges:

Age Range	Total
0 – 2	20
3 – 4	8
5 – 7	16
8 – 10	22
11 – 14	27
15 - 17	25

There are currently 9 gypsy traveller children attending Monmouthshire's schools, 7 in primary schools and 2 in secondary schools.

Households

Of the 38,233 occupied households in Monmouthshire, 39.9% have homes that are owned outright, 33.7% with a mortgage, 0.4% are shared ownership, 4.2% are council rented, 9.7% are social rented, 10.8% are privately rented and 1.4% are living rent free.

There are a number of additional housing developments that are planned throughout Monmouthshire, as follows:

Area	Site Size	2015/16	2016/17	2017/18
Abergavenny	575	80	94	69
Monmouth	565	2	89	99
Caldicot	1,052	9	27	60
Chepstow	567	44	0	32
Usk & Raglan	75	0	3	7
TOTAL	2,824	135	213	267

As of 30th June 2015, there were 2,100 unemployed people aged 16-64 years living in Monmouthshire; this is significantly lower than the All Wales average. It is anticipated that this figure will reduce still further to 1,300 in 2016.

	Total	Percentage
Number of households with dependent children	10,629	27.8%
Number of workless households with dependent children	994	2.6%
Number of lone parent families with dependent children	2,057	5.4%

Despite the fact that Monmouthshire is a relatively affluent area when compared with the rest of Wales, there are still 12.9% of dependent children living in low income families in Monmouthshire. 1,500 dependent children living in households claiming Job Seekers Allowance, 180 dependent children living in households claiming Working Tax Credit and Child Tax Credit, 270 dependent children living in households claiming just Child Tax Credit and 15,115 dependent children living in households claiming Child Benefit.

Ethnic Background and Religion

According to the 2011 Census, the ethnicity and religions of the Monmouthshire population is as follows:

Ethnic Background	%	Religious Background	%
White (British, Irish or Other)	98%	Christian	62.5%
Mixed/Multiple Ethnic Groups	0.8%	Buddist	0.3%
Black or Black British	0.1%	Muslim	0.3%
Asian or Asian British	0.8%	Hindu	0.2%
Chinese	0.2%	Jewish	0.1%
Arab	0.1%	Sikh	0.1%
		Other	0.4%
		None	28.5%
		No Religion Stated	7.7%

Only 52.1% of the population identify themselves as Welsh.

Welsh Language Profile

There has been an increase in the number of Welsh speakers living in Monmouthshire; however, the percentage with no knowledge of the Welsh language is almost 13% higher than the All Wales average.

Welsh Language	%
Speak, read and write	7.2%
Speak and read	0.7%
Speak only	1.8%
Understands Spoken Welsh	2.5%
Other Combinations	1.9%
No knowledge	86%

According to Monmouthshire's Welsh Education Strategic Plan (WESP), 6% of year 2 pupils are receiving their education through the medium of Welsh, which is an increase of 1.8% since 2011 and it is anticipated that this figure will continue to grow. There are variations in the proportion of Welsh speakers across the county, which may be explained in part by the location of Monmouthshire Welsh medium primary schools, as there is some evidence of clustering in the Abergavenny and Caldicot region (*Monmouthshire Welsh Language Scheme 2012 – 2015*).

5. Overview – Childcare Types, Services and Places

5.1 Number of Childcare Providers & Type of Services (Registered and Unregistered/ Approved)

Childcare Type	Registered	Unregistered/ Approved)	Childcare Services Offered	Registered	Unregistered/ Approved
Childminder	46	0	Full day care throughout the year	42	0
			Half day care throughout the year	31	0
			Before school	34	0
			After school	40	0
			Wrap Around	34	0
			Holiday Provision	38	0
			Other	0	0
Full Day Care	23	0	Full day nursery throughout the year	20	0
			Half day nursery (am)	13	0
			Half day nursery (pm)	12	0
			Before school	3	0
			Morning Playgroup/ Cylch Meithrin	3	0
			Afternoon Playgroup/ Cylch Meithrin	2	0
			After school	2	0
			Wrap Around	14	0
			Lunch	12	0
			Holiday Provision	12	0
			Crèche	1	0
			Other	0	0
Sessional Day Care	17	1	Morning Playgroup/ Cylch Meithrin	17	1
			Afternoon Playgroup/ Cylch Meithrin	7	0
			Wrap Around	1	0
			Lunch	3	1
			Other	2	0

Crèches	1	0	Operates Full Day	0	0
			Operates Mornings	1	0
			Operates Afternoons	1	0
			Holiday Provision	0	0
			Other	0	0
Out of School Care	11	7	Before School	3	0
			After School	11	7
			Holiday Provision	2	1
			Playscheme sessions	0	0
			Other	0	0
Open Access Play Provision	0	8	Before School	0	0
			After School	0	0
			Holiday Provision	0	8
			Playscheme sessions	0	0
			Other	0	0
Nanny	0	0	Full day care throughout the year	0	0
			Half day care throughout the year	0	0
			Before school	0	0
			After school	0	0
			Wrap around	0	0
			Holiday provision in the school holidays	0	0
			Other	0	0
TOTAL	99	16			

Geographical Distribution of Childcare Providers & Services Provided (Registered and Unregistered)

- There is a reasonable spread of childminders across all areas, with the highest number in Caldicot and the least in Usk & Raglan. The majority of childminders offer a full range of services including full day care, half day care, before and after school care, wrap around care and holiday care.
- There is an even spread of full day care provision across all five areas, although Chepstow has the lowest number. Around half of all full day care providers offer a range of services, the others report only offering full day nursery; however, this seems to be due to providers misunderstanding the question asked as we know that these settings offer a range of sessions. Over half of full day care providers offer holiday care.
- The majority of sessional care in Monmouthshire is registered, only one setting in Chepstow is unregistered and they are currently going through the registration process. There is more sessional care in Abergavenny than any other area and there is no sessional care in Usk & Raglan. All sessional care providers offer morning playgroup sessions; seven providers also offer afternoon playgroup sessions. In addition, a few sessional care providers also offer lunch care or wraparound care.
- There is only one registered crèche operating in Abergavenny but it is specifically for children with additional needs. We are not aware of any other crèches, either registered or unregistered, operating in Monmouthshire.
- Only 61% of out of school childcare providers in Monmouthshire are registered, the remaining settings are limited to 2 hours of provision. The majority (39%) of out of school childcare is available in the Abergavenny area, although there is provision in all areas of Monmouthshire. There is a limited number of before school clubs due to the fact that the majority of primary schools in Monmouthshire have free breakfast clubs. There are very few holiday clubs and they are only available in Abergavenny and Chepstow.
- There is no registered open access play provision in Monmouthshire and the unregistered provision is only available during school holidays. It is spread across the four main towns but there is currently none available in the Usk & Raglan area.
- We don't have any information relating to nannies working within Monmouthshire, although one parent in Caldicot and another in Monmouth reported through the parental survey that they currently utilise a nanny for childcare.

5.2. Childcare Places – Supply and Demand per Childcare Type

Registered Provision – Term Time

Childcare Type	Places as per Registration	Term Time				
		Maximum Capacity of Childcare Places Available Daily	Number of Children Using Service	Number of Vacancies	Number of Children on Waiting List	Number of Childcare Places Required
Childminder	336	336	355	67	11	280
Full Day Nursery	917	917	990	375	43	885
Sessional Day Care	384	534	441	215	20	361
Crèches	9	18	36	10	0	7
Out of School Care	478	592	793	382	486	402
Open Access Play	0	0	0	0	0	0
Nanny	0	0	0	0	0	0

Unregistered Provision – Term Time

Childcare Type	Term Time				
	Maximum Capacity of Childcare Places Available Daily	Number of Children Using Service	Number of Vacancies	Number of Children on Waiting List	Number of Childcare Places Required
Childminder	0	0	0	0	0
Full Day Nursery	0	0	0	0	0
Sessional Day Care	36	22	60	0	24
Crèches	0	0	0	0	0
Out of School Care	144	56	45	0	135
Open Access Play	0	0	0	0	0
Nanny	0	0	0	0	0

Registered Provision – School Holidays

Childcare Type	Places as per Registration	School Holidays				
		Maximum Capacity of Childcare Places Available Daily	Number of Children Using Service	Number of Vacancies	Number of Children on Waiting List	Number of Childcare Places Required
Childminder	298	298	292	73	7	232
Full Day Nursery	403	403	349	54	8	357
Sessional Day Care	44	44	54	3	0	41
Crèches	0	0	0	0	0	0
Out of School Care	166	166	103	68	0	98
Open Access Play	0	0	0	0	0	0
Nanny	0	0	0	0	0	0

Unregistered Provision – School Holidays

Childcare Type	School Holidays				
	Maximum Capacity of Childcare Places Available Daily	Number of Children Using Service	Number of Vacancies	Number of Children on Waiting List	Number of Childcare Places Required
Childminder	0	0	0	0	0
Full Day Nursery	0	0	0	0	0
Sessional Day Care	0	0	0	0	0
Crèches	0	0	0	0	0
Out of School Care	26	38	10	0	24
Open Access Play	400	536	0	0	400
Nanny	0	0	0	0	0

Geographical Distribution of Childcare Places per Childcare Type – Supply and Demand – Term Time

- Overall it appears that 20% of registered places are vacant during term time; however, places are often shared by more than one child on different days or at different times of the day. There are substantially more places available with childminders in the Caldicot area, however demand for places is also higher.
- There is a good spread of full day care provision across all areas of Monmouthshire. Even though Chepstow has the fewest number of full day care settings, it has one of the highest number of childcare places available and it has the highest take up of full day care places.
- Almost half of all sessional care places taken up are in the Abergavenny area, however supply of places is also highest in this area and they currently have the highest number of vacancies.
- The only crèche is situated in Abergavenny and there are 9 places available over 7 sessions; 72% of places filled are used on an ad hoc basis.
- There are a large number of children accessing out of school childcare places but there are also a relatively high number of vacancies, suggesting that most children only attend for 1 or 2 sessions a week. The greatest capacity for out of school places is in the Abergavenny area but the SASS data suggests there is demand for these places. The lowest number of places are available in Caldicot and Usk & Raglan and there are very few vacancies reported in these areas.
- There is no open access play provision available during term time.

Geographical Distribution of Childcare Places per Childcare Type – Supply and Demand – School Holidays

- There are less children using childminders during school holidays than during term time and there are a relatively high number of vacancies (24%). As with term time provision, supply and demand of childminder places is higher in the Caldicot area than any other area of Monmouthshire during school holidays.
- Additional full day care is available in all areas during school holidays but none is taken up in Chepstow and very little in Monmouth and only during summer holidays.
- There is no sessional care available in Abergavenny or Usk & Raglan during the school holidays and only a limited number of places in the other three areas.
- There are no crèche places available during school holidays.
- Holiday care is not available in Monmouth or Caldicot and it is only available during the summer holidays in Chepstow and Usk & Raglan. Abergavenny has holiday care available during most school holidays but demand for places is low.
- The open access play provision was well attended, with the lowest take up in Abergavenny and the highest take up in Caldicot.

6. Supply of Childcare

6.1. Childminder

6.1.1. Analysis of Supply of Childcare Provision

We only had 46 childminders complete their SASS return so the information included in this report is based on their responses; however, we have a total of 63 registered childminders and we are aware of a number of others currently going through the registration process.

- Range of services provided - There is a good spread of childminders across all areas of Monmouthshire but there are substantially more childminders in the Caldicot area. The majority of childminders provide a wide range of services including full day care, before and after school care, wrap around care and holiday care.
- Number and type of child places filled (full time, part time, ad-hoc) – More than 45% of places filled in term time and 42% filled in school holidays are in the Caldicot area. All places used during term time are on a part time or ad hoc basis, however there are full time places taken up during school holidays. All types of childcare are utilised in each area of Monmouthshire both in term time and in each week of the school holidays.
- Number of places filled by children who have special educational needs or who require specialist care due to a disability - There are 12 children with special educational needs or a disability currently being cared for by childminders, these are spread across all areas of Monmouthshire. The vast majority (83%) of these children have speech, language and communication difficulties.
- Number of Welsh language places filled - There are currently no Welsh language childminders in Monmouthshire and only 22% of childminders reported that they have some bilingual elements.
- Vacancies and waiting lists - There are vacancies with childminders in all areas of Monmouthshire during term time, although this figure appears to be significantly higher in the Usk & Raglan area. There are no vacancies reported in the Abergavenny area during school holidays. Most of the places on a waiting list are reported in the Usk & Raglan area; however, considering this is also the area with the most vacancies, I think some childminders have misunderstood the

question and included children that are booked in to start at a later date and the place is not yet required.

- Opening times and range of session lengths - Most childminders offer a range of session times and there is childcare available in all areas of Monmouthshire between 8am and 6pm, Monday to Friday. All areas have limited childcare available between 7am and 8am each week day, apart from Abergavenny where there is only one childminder providing this for 3 days a week and Usk & Raglan where this is only provided Monday to Thursday. There is also limited childcare available after 6pm in Caldicot, Chepstow and Monmouth. Only one childminder in Caldicot provides childcare at weekends and no childminders currently operate after 10pm. This range of opening times and session lengths is the same during all school holidays, apart from Christmas week when there is a limited service available in Abergavenny, Chepstow and Usk & Raglan and no provision in Caldicot and Monmouth.
- Age range of children - There are childminders in each area of Monmouthshire that accommodate children aged between 0 and 11 years. According to the SASS data, there is only one childminder in Caldicot that accommodates children aged 12 – 14 years and there are no childminders that accommodate children aged 15 – 17 years. During term time, only 14% of the total children cared for by childminders are aged under 2 years, 41% are aged between 2 and 4 years and 45% are aged 5 and over; this is a similar spread during school holidays. In Caldicot there are a significantly high number of children aged 5 and over being cared for by childminders in both term time and school holidays.
- Range of charges – It is difficult to analyse the charges as some childminders have completed their hourly rate whilst others seem to have completed their daily rate, with no indication of the number of hours this covers. It appears that the hourly rate varies between £3 and £6 per hour, with the cheapest provision in Caldicot and Usk & Raglan, and the most expensive provision in Abergavenny. The daily rate for full day care varies from £30 a day to £45 a day, with £40 being the most common daily charge. Based on the daily rate, Caldicot offers the cheapest childcare and Abergavenny tends to be the most expensive. The cost of a half day varies from £15 to £24 but there is no indication to the length of this session, so it is difficult to compare costs. There is only one childminder in Abergavenny that has reported that they make an additional charge for nappies, snacks, meals and transport; however, the majority of childminders didn't complete this section of the questionnaire. 28% of childminders offer some form of sibling discount, more than half of these are in the Caldicot area.

6.1.2. Summary of Key Strengths and Weaknesses

Strengths:

- There is a good spread of childminders throughout Monmouthshire and a wide range of services provided by these childminders.
- Childminders are willing and able to provide childcare for children with special educational needs or a disability.
- Families generally use this provision on a part time basis or make ad hoc arrangements, so it is flexible enough to meet the changing needs of individual families.
- There are vacancies in all areas of Monmouthshire during term time and in most areas during school holidays.
- There is a wide spread of ages being cared for by childminders throughout Monmouthshire. Although there are currently no childminders caring for children aged 15 – 17 years and only one reporting they care for a child aged 12 – 14 years, this is due to a lack of demand as most childminders are able and willing to accommodate older children, if required.
- Childminders supply a significant amount of after school care for children aged 5 and over, particularly in the Caldicot area.
- The cheapest childcare provision is available in the Caldicot area and they also tend to offer sibling discounts in this area.

Weaknesses:

- Childminders tend to be transient so there is a relatively high turnover and a constant need to recruit new childminders.
- There are no Welsh medium childminders in Monmouthshire and only 22% have some bilingual elements to their provision.
- There are currently no vacancies reported in Abergavenny during school holidays.
- According to the SASS data, there is only limited provision available during atypical hours such as before 8am, after 6pm and at weekends and no provision after 10pm; however, we are aware that some childminders do provide these services to families on an ad hoc basis.
- The most expensive childcare provision is in the Abergavenny area and this is the only area where there are childminders making additional charges for nappies, snacks and so on.

6.2 Full Day Nursery

6.2.1. Analysis of Supply of Childcare Provision

A number of our larger day nurseries were going through a change of ownership during the summer so were unable to complete their SASS return; hence the data is lower than it should be. We have also had an additional two day nurseries open this term, so their data is not included either.

- Range of services provided - The majority of settings registered as full day care offer full day places, apart from one in Caldicot and two in Monmouth. According to the data, around half of the settings don't provide half day care; however, this is probably due to a misunderstanding of the questionnaire, as we know that all of our settings take children for half a day if their full day places are not filled. Very few settings claim to offer places before and after school, whilst more than half provide wrap around, lunch and holiday care. This pattern of provision is similar for all areas of Monmouthshire
- Number and type of child places filled (full time, part time, ad-hoc) - 63% of childcare places filled during term time are for full day nursery and the majority of these are used on a part time basis, apart from in Abergavenny where, according to the SASS data, almost all places are filled on a full time basis. 84% of lunch places are filled on a part time basis. In Usk & Raglan, all places during school holidays are filled on an ad hoc basis, whilst the majority of holiday places in Abergavenny and Caldicot are filled on a part time basis. According to the data, no holiday places are taken up in Chepstow and only a small number are occupied in Monmouth and those are only utilised in the summer holidays.
- Number of places filled by children who have special educational needs or who require specialist care due to a disability - There are 32 spaces filled by children who have a disability or special educational needs, of these 14 children are in funded or part time education places; these children are spread across all areas of Monmouthshire.
- Number of Welsh language places filled - There are no Welsh language places available; all full day care settings in Monmouthshire are English with some bilingual elements.
- Vacancies and waiting lists - Settings in Caldicot report the highest number of full day vacancies, whilst in Chepstow they have very few full day places vacant but they have a high number of half day places, both in the mornings and the afternoons. Settings in Usk & Raglan are the only ones to report vacancies for lunch places. Numbers on waiting lists during term time are very low, with the highest number being in Caldicot and none reported for Chepstow. During school holidays,

there is only one setting in Caldicot reporting a waiting list and only during the summer holidays.

- Opening times and range of session lengths - All areas have a range of sessions available during term time and school holidays, these mostly operate between the hours of 8am and 6pm or somewhere in between. There are a few settings that operate from 7.30am and one setting in Caldicot that operates after 6pm but only until 6.30pm. No settings offer overnight care or weekend care. There are settings in each area operating during 12 weeks of the school holidays, with the exception of Christmas week.
- Age range of children - More than half of all full day care providers can accommodate children from 0 – 7 years, with almost all able to accommodate children aged between 2 and 4 years. Only one setting in Monmouth, Caldicot and Usk & Raglan can accommodate children aged 8 – 11 years, and none in Abergavenny or Chepstow. During term time, there are children attending in each age group up to 4 years in each of the areas and in the 5 – 7 age group for all areas except Chepstow. Monmouth and Caldicot have children aged 8 – 11 years currently attending. During school holidays there is a similar spread of ages attending in Abergavenny, Caldicot and Chepstow; Monmouth only have children aged 4 – 11 attending during school holidays and in Usk & Raglan all children are aged between 5 and 11 years.
- Range of charges – According to the SASS data, the hourly cost of full day care ranges between £3 and £4.20 and for a half day or less it ranges from £2.80 per hour to £5.25 per hour, with the cost of lunch care ranging between £1 and £4.50. Some settings appear to have given the cost of the session rather than the hourly cost but there is no indication of the session length so it is not possible to calculate the hourly rate from this. Only one setting in Monmouth charges for nappies, meals, snacks and transport with another setting in Usk & Raglan charging for meals and snacks. 10 settings offer some form of sibling discount but none of these are in the Chepstow area.

6.2.2. Summary of Key Strengths and Weaknesses

Strengths:

- There is a good range of services provided by full day care settings and more than half offer wrap around care, lunch clubs and holiday care.
- Full day nursery is the most commonly used service and in Abergavenny this provision is mostly taken up on a full time basis.
- Provision for children with special educational needs or a disability is good and many of these children receive funded support for early education.
- Numbers on waiting lists are low and there are currently vacancies in all areas of Monmouthshire during term time and school holidays.
- There are a wide range of session lengths available in all areas and several settings offer provision between 7.30 and 8am.
- Each area has full day care available during 12 weeks of the school holidays, with the only exception being Christmas week.
- Charges vary dramatically, however it tends to be cheaper than childminders and only one setting has additional charges.

Weaknesses:

- There are no Welsh medium full day care providers in Monmouthshire.
- Very few full day care providers offer before school or wrap around care; this is partly due to the age range of the children they care for as many of them are currently only registered for children up to the age of 5 years.
- Take up of childcare places during school holidays is poor and where it is taken up it tends to be on a part time or ad hoc basis, which doesn't help settings to offer a sustainable service.
- There are very few vacancies for full day nursery reported in the Chepstow area; however, two of the largest day nurseries in this area didn't complete their SASS return so their data is not included within this analysis.
- There are no full day care providers offering overnight or weekend care and only one provides childcare after 6pm.
- Children aged 0 – 7 years are accommodated in all areas of Monmouthshire but provision for children aged 8 – 11 years is extremely limited.

6.3 Sessional Day Care

6.3.1. Analysis of Supply of Childcare Provision

A considerable number of the sessional care providers listed in our previous CSA have now registered as full day care. A third of our existing sessional care providers are Flying Start settings and half of these only take Flying Start children.

- Range of services provided - There is no sessional care available in Usk & Raglan and only morning playgroup available in Chepstow. There are only six settings offering morning and afternoon playgroup places and five of these are in the Abergavenny area. Only two settings in Abergavenny and one in Monmouth provide a lunch club and one offers wrap around care. Monmouth, Caldicot and Chepstow offer care during the school holidays but this is not available in Abergavenny or Usk & Raglan.
- Number and type of child places filled (full time, part time, ad-hoc) - There is a significantly higher take up of places in morning playgroup / cylch meithrin than afternoon sessions. During term time there are more places filled on a part time basis (65%) than full time in all areas and only one place in Abergavenny is used on an ad hoc basis. During school holidays most places are filled full time.
- Number of places filled by children who have special educational needs or who require specialist care due to a disability - There are 37 children with special educational needs or a disability attending sessional care, 18 of whom are in funded Early Education places. Two thirds of these children are in the Abergavenny area and none are in the Monmouth area.
- Number of Welsh language places filled - There is one Welsh medium setting in the Abergavenny area offering 26 places for children aged 2 – 4 years. There are 39 children using this setting and they reported having one vacancy. They only provide morning cylch meithrin places, however they also offer lunch club and wrap around the Welsh school meithrin. All of the remaining sessional care providers are English with some bilingual elements.
- Vacancies and waiting lists - There are a relatively high number of vacancies in the Abergavenny and Chepstow areas and very few in Monmouth, although we presume many of these vacancies are the same place on different days. Only Abergavenny reports having a waiting list; however, we assume that many of these are ineligible children waiting to be old enough to start as there are sufficient vacancies in the area.

- Opening times and range of session lengths - Almost all morning sessions operate Monday to Friday, apart from Chepstow where there is one setting that doesn't operate on a Friday. The sessions generally range between 2 and 3 hours in length, start between 9am and 9.30am and finish between 11.30am and 12.30pm. Afternoon sessions tend to only open a few days a week and almost all afternoon sessions run for 2.5 hours, apart from one in Caldicot that runs for 2 hours and one in Abergavenny that runs for 2 hours 15 minutes. Lunch sessions appear to be between 45 minutes and 1.5 hours in length. All holiday provision operates for 2.5 hours and it is only available for 2 or 3 weeks of the summer holidays.
- Age range of children - Overall, there is a fairly even split between 2, 3 and 4 year olds attending sessional care settings. In Monmouth and Caldicot there are more 2 year olds than any other age group but this is due to the fact that 1 of the 3 settings in each of these areas is a Flying Start only setting. In Abergavenny they have a high proportion of 3 year olds and in Chepstow there are more 4 year olds than any other age group, as 40% of these settings are Early Education Providers.
- Range of charges - According to the SASS data, the cost for a morning session ranges from 41p to £9.50 with half of those that completed this question reporting that they charge £8 or more per session. Afternoon playgroup sessions are much cheaper than this ranging between 41p and £3 and the wrap around session costs £11. Lunch sessions range between £1.50 and £3.80. One setting in Chepstow makes an additional charge for nappies, snacks, meals and transport and one setting in Abergavenny has other charges but does not stipulate what these are; other than that, sessional care providers report that they don't have any additional charges. One setting in Chepstow offers a 10% discount for a 2nd child and one setting in Caldicot offers a 50% discount for a twin.

6.3.2. Summary of Key Strengths and Weaknesses

Strengths:

- A third of our sessional care providers are Flying Start providers and offer free childcare places.
- Provision for children with special educational needs or a disability is good and many of these children receive support funded by the Local Authority.
- There are sufficient vacancies for sessional care in all areas of Monmouthshire; although there are no sessional care providers in Usk & Raglan, we are aware of vacancies for sessional care available with full day care providers in this area.
- There is a range of charges but it tends to be cheaper per hour than other types of childcare, particularly afternoon places.

Weaknesses:

- There is currently no sessional care available in the Usk & Raglan area and only one in Chepstow; however, this is largely due to the fact that many childcare providers have extended their services and are now registered as full day care but they still offer sessional care.
- The range of services available is limited and a high proportion only offer morning playgroup places.
- Not all settings operate Monday to Friday and afternoon playgroup places tend to be available 2 to 3 days of the week only.
- There is only one Welsh medium setting in Abergavenny and they only have one vacancy currently; they are not able to offer childcare during the afternoons. There is no Welsh medium childcare available in the rest of Monmouthshire.
- The majority of places are only filled on a part time basis and take up of afternoon playgroup places in particular is low.

6.4 Crèches

6.4.1. Analysis of Supply of Childcare Provision

There is only one registered crèche operating in Monmouthshire and the Family Information Service isn't aware of any unregistered crèches.

This crèche is situated in Abergavenny and is registered for 9 children aged between 0 and 5 years. They currently have 36 children using the provision and 86% of these are aged 0 – 3 years. It is a disability crèche so all children that attend have special educational needs or a disability. The setting describes itself as English with some bilingual elements. They are open for a 2.5 hour session in the mornings four days a week and a 2 hour afternoon session 3 days a week. They don't operate during school holidays or at weekends. They have 10 vacancies and they don't have a waiting list. This crèche is only available by referral and there is no cost, neither are there any additional charges for nappies or snacks and no sibling discount is required.

6.4.2. Summary of Key Strengths and Weaknesses

There is a need for more crèche facilities offering a range of services in all areas of Monmouthshire; this is a significant weakness.

6.5 Out of School Care

6.5.1. Analysis of Supply of Childcare Provision

39% of out of school care settings in Monmouthshire are not registered so did not complete the SASS return. We have attempted to collect relevant data from these settings but not all have provided us with attendance data, vacancies, waiting lists and so on, so the figures included within this analysis are lower than the actual figures.

- Range of services provided - All registered and unregistered out of school care settings provide after school care and they are spread across Monmouthshire, with the majority operating in the Abergavenny area. Two of the settings in Abergavenny and one in Usk & Raglan also provide before school care, as they are situated in schools that don't have a free breakfast club. One setting in Abergavenny offers holiday care during the summer holidays and half term holidays, two settings in Chepstow offer holiday care during the summer holidays only. There is no holiday care in Monmouth, Caldicot or Usk & Raglan.
- Number and type of child places filled (full time, part time, ad-hoc) - There is no specific data relating to attendance at the two breakfast clubs in Abergavenny, however we are aware that these clubs are extremely well attended, as is the one in Usk & Raglan; attendance tends to be on a full time basis. Attendance at after school clubs is also good and most children attend on a full time basis, apart from in Abergavenny where attendance tends to be on a part time basis; however, data is limited as many of the clubs in this area are unregistered and didn't supply attendance data. Holiday clubs don't appear to be well attended and are used mostly on a part time basis.
- Number of places filled by children who have special educational needs or who require specialist care due to a disability - There are 13 children reported to have special educational needs or a disability attending out of school care and they are spread across all areas apart from Monmouth; however, we are aware of a further five children attending a setting in Monmouth that currently receive extra hands funding to support children with additional needs.
- Number of Welsh language places filled - There is an After School Club offering Welsh language places at the Welsh school in Abergavenny and they are full with a waiting list, however they don't run to their full capacity due to problems identifying suitably qualified Welsh speaking staff. A further 33% of settings have some bilingual elements but the remaining out of school care settings describe themselves as English only.

- Vacancies and waiting lists - According to the data, there are no vacancies at before school clubs but a significantly high number of vacancies at after school clubs in Monmouth and Chepstow. There is a small waiting list at one setting in Caldicot and a significant number on the waiting list for the one setting in Usk & Raglan. More than 35% of holiday care spaces are reported as being vacant and there are no waiting lists in school holidays.
- Opening times and range of session lengths - Before school clubs operate between 8am and 9am and after school clubs mostly operate from 3.15pm to 5.30pm, although unregistered settings finish earlier as they are limited to two hours in length. Most settings are open from Monday to Friday but a few settings are only open from Monday to Thursday. Holiday care in Abergavenny operates Monday to Friday from 8.30am to 6pm and is available during the summer holidays and half term holidays. The holiday care in Chepstow runs Monday to Friday from 8.30am to 5.30pm but is only available during the summer holidays.
- Age range of children – There are a few 3 year olds accessing out of school care in Monmouthshire during term time and a small number of 4 year olds; nevertheless, 46% of users are aged 5 – 7 years and 51% are aged 8 – 11 years. During school holidays, there is only one 3 year old and three 4 year olds reported as using holiday care in Abergavenny and the remainder of users are spread between the 5 – 7 and 8 – 11 age groups. Almost 66% of users in Chepstow are aged 8 – 11 years and none are below the age of 5.
- Range of charges – All before school clubs charge £2.75 per session and after school clubs range from £3.36 an hour to £10 per session. Only two holiday clubs provided costs and they both charge £20 a day. Six settings across four areas of Monmouthshire offer some type of sibling discount, ranging from a discount of 25p or £2 for a second child to a 20% discount or a 15% discount for a third child. None of the out of school childcare clubs in Chepstow offer a sibling discount. There are no additional charges reported by out of school childcare clubs.

6.5.2. Summary of Key Strengths and Weaknesses

Strengths:

- There is a good spread of after school childcare available across Monmouthshire, particularly in the Abergavenny area.
- There is a holiday club in Abergavenny that operates for 9 weeks of the school holidays.
- Attendance at before school and after school clubs is good and, according to SASS data, a lot of families utilise this provision on a full time basis.
- The cost of out of school care, particularly holiday care, is relatively cheap when compared with other childcare types and there are no additional charges reported.
- Children with special educational needs or a disability are supported to enable them to access out of school childcare.

Weaknesses:

- 39% of out of school childcare settings in Monmouthshire are unregistered so they are restricted to a maximum of 2 hours in length and parents are unable to claim the childcare element of Working Tax Credit towards the cost of this provision.
- There is a need for more Welsh medium out of school childcare provision.
- There are very few before school clubs in Monmouthshire; however, this is due to the fact that the majority of Monmouthshire primary schools have a free breakfast club on site, so there is no demand for this additional provision.
- There are not sufficient places at out of school clubs in Usk & Raglan and one Caldicot setting, as they currently have no vacancies and a waiting list.
- There are no holiday clubs in Monmouth, Caldicot or Usk & Raglan and limited provision in Chepstow during summer holidays only.
- Holiday clubs are not well attended, with more than 35% of places vacant, and they tend to be used on a part time basis only.
- There are very few children below the age of 5 accessing out of school childcare, particularly holiday care.

6.6 Open Access Play Provision

6.6.1. Analysis of Supply of Childcare Provision

There is no registered open access play provision in Monmouthshire and none currently available during term time.

- Range of services provided - Open access play provision was available at eight locations during the summer holidays, two each in Abergavenny, Monmouth, Caldicot and Chepstow; there is no open access play provision in Usk & Raglan.
- Number and type of child places filled (full time, part time, ad-hoc) - A total of 536 children attended open access play provision during the summer holidays, ranging from 97 in Abergavenny to 205 in Caldicot. The majority of places were filled on an ad hoc basis.
- Number of places filled by children who have special educational needs or who require specialist care due to a disability - 35 children with special educational needs or a disability received 1:1 support to enable them to attend open access play sessions across all four areas. 5 children with higher complex needs were supported to attend specialist provision in a neighbouring authority.
- Number of Welsh language places filled - There are no Welsh language places available in open access play settings, they all describe themselves as English only.
- Vacancies and waiting lists – There is no information available as to vacancies or waiting lists.
- Opening times and range of session lengths – All open access play provision operated from Monday to Friday and was open 10am to 12pm and 1pm to 3pm each day.
- Age range of children – All open access play provision was available to children aged between 5 and 11 years. We were unable to obtain a breakdown of the actual ages of children that attended the sessions.
- Range of charges - There was no cost to attend the open access play provision.

6.6.2. Summary of Key Strengths and Weaknesses

Strengths:

- The open access play provision offered during the school holidays was well attended and it is intended to offer similar provision during future school holidays.
- There is support to enable children with special educational needs or a disability to attend open access play provision.
- This provision is free of charge.

Weaknesses:

- There is no open access play provision during term time and school holiday provision is not registered with CSSIW, so session lengths are restricted to 2 hours.
- There is no open access play provision in the Usk & Raglan area.
- There is no Welsh medium or bilingual open access play provision in Monmouthshire.
- Open access play provision is only available to children aged 5 – 11 years.

6.7 Nanny

6.7.1. Analysis of Supply of Childcare Provision

There are currently no nannies registered in Monmouthshire and none advertising through the Family Information Service, therefore we were unable to collect any data relating to nannies.

6.7.2. Summary of Key Strengths and Weaknesses

There is a need for more information as to the availability of nannies within Monmouthshire and to encourage existing nannies to register through the voluntary approval scheme.

7. Understanding the Needs of Parents/ Carers

7.1 Overview of Consultation

Status	Number	Percentage
Parent/ Carer in work (not expecting a baby)	142	73.6%
Parent/ Carer in education or training (not expecting a baby)	4	2.1%
Parent/ Carer seeking work (not expecting a baby)	8	4.1%
Parent/ Carer seeking education or training (not expecting a baby)	1	0.5%
Expecting or on maternity/ paternity leave with <u>first</u> child	5	2.6%
Adopting <u>first</u> child	0	0%
Parent/ Carer expecting or on maternity/ paternity leave with <u>additional children</u>	0	0%
Adopting or on adoption leave with <u>additional children</u>	1	0.5%
Parent/ Carer not in work	30	15.5%
Parent/ Carer not in education or training	2	1.0%

Respondents by Annual Household Income

Average Annual Household Income	Number	Percentage
£0-£10,000	10	5.2%
£10,001-£20,000	23	11.9%
£20,001-£30,000	23	11.9%
£30,001-£40,000	36	18.7%
£40,001-£50,000	23	11.9%
£50,001-£60,000	13	6.7%
£60,001-£70,000	19	9.8%
£70,000+ per annum	18	9.3%
Prefer not to say	28	14.5%

Respondents by Ethnic Group

Ethnic Group	Number	Percentage
White	188	97.4%
Mixed/ Multiple Ethnic Groups	0	0%
Asian/ Asian British	1	0.5%
Black/ African/ Caribbean/ Black British	0	0%
Other Ethnic Group	1	0.5%
Not given	3	1.6%

Language of Respondents (Primary Language Spoken at Home)

Language	Number	Percentage
Welsh only	0	0%
English only	171	88.6%
Bilingual	15	7.8%
Other languages	4	2.1%
Not given	3	1.6%

Respondents' Children by Age Group

Age	Number
Under 12 months	21
12-18 months	20
19-23 months	5
2 years	32
3 years	40
4 years	47
5-7 years	92
8-11 years	78
12-14 years	28
15-17 years	12

Respondents with Children who have Special Educational Needs or Disability

Special Educational Needs/ Disability	Number
Speech and language	2
Specific learning (dyslexia)	2
Hearing difficulties	0
Learning difficulties	0
Visual difficulties	1
Emotional and behavioural difficulties	0
Physical	0
Medical condition	1
Other (specify) - autism	2
Other (specify) – mental health	1
Yes (not specified)	2

7.2. Current Use of Childcare

7.2.1. Analysis of Current Use of Childcare Provision

There were only 193 responses received to the parental survey and many respondents didn't answer every question, hence the information that can be obtained from this is limited and isn't necessarily representative of the entire childcare market.

- Range of services being used - There were more responses received from the Chepstow area than any other area of Monmouthshire. All types of childcare were being used in each area apart from open access play, which was only being used by families in Usk, and nannies registered through the voluntary approval scheme, of which there aren't any in Monmouthshire. The most utilised type of childcare was full day care, closely followed by childminders. The range of services being used for each childcare type was widespread; the highest responses were for before school care provided by childminders in Usk & Raglan and family and/or friends in the Chepstow area.
- Number and type of childcare places used (full time, part time, ad-hoc) - In all types of childcare, the majority of places were taken up on a part time basis, with only 2 families using a childminder full time, 7 families using full day care full time and 1 family in Monmouth using family and/or friends on a full time basis. The number of childcare places used does not correspond to the earlier information supplied as not all parents completed this question; therefore it is not reliable data.
- Number of places required for children who have special educational needs or who require specialist care due to a disability - There were several respondents who had children with special educational needs or a disability but none of these used childcare for these children.
- Number of places used by language category - 90% of childcare provision used within the local authority during term time was described as being English with some bilingual elements, 7% was Welsh and 3% was English only. All childcare provision accessed during school holidays or out of county was English with some bilingual elements.
- Age range of children using/ not using childcare - The age range of children using childminders was fairly evenly spread between under 12 months to 8 - 11 years of age, with only one family in Abergavenny utilising a childminder for a child aged 12 – 14 years and none for children over the age of 15. Children attending full day care are aged between under 12 months to 5 – 7 years of age, although the vast majority are aged 2 or 3 years. Sessional care users are aged between 2 and 4 years and the modal age group for sessional care is 5 – 7 years. There is no particular pattern to the age range of

children not using childcare; although, according to the data, there were no children aged between 19 months and 3 years of age not using childcare.

- Reasons for using/ not using childcare - The only reasons given for using childcare were for employment or seeking employment. The most popular reason for not using childcare was family or friends look after their children, another popular response was that they or their partner were a stay at home parent. One respondent from each area claimed that childcare was too expensive and 3 respondents claimed that there was no childcare available at the times that they need it. Other reasons given for not using childcare included children are old enough to look after themselves, parent is currently on maternity leave and parent works school hours so doesn't require childcare.
- Accessibility/ availability and affordability of childcare provision - The main response in relation to improvements for childcare provision was to make it more affordable. Childcare available before 8am and after 6pm was another common response, particularly in the Chepstow area; however, only 2 respondents requested overnight care and 6 respondents would like weekend care. Availability of Welsh medium childcare was only really an issue in Abergavenny and there were very few respondents suggesting improvements were required regarding the location of childcare, although several respondents in Abergavenny and Caldicot would like the childcare to be located closer to home. Availability of childcare at different times of day during school holidays was suggested by respondents in all areas of Monmouthshire.
- Parental views on the childcare on offer - 94% of respondents were satisfied with the quality of their childcare during term time, whilst only 67% were satisfied with the quality of their childcare during school holidays. 54% of respondents disagreed that there was a good choice of childcare and 47% agreed that there was not childcare available at the times they required it. However, 72% of respondents agreed that childcare was well located, 81% disagreed that there was no childcare available for the age of the child, 76% agreed that the childcare catered for their children's needs and 77% disagreed that their childcare was unreliable. 77% felt that childcare was too expensive and 31% preferred to use family or friends but only 34% would like to increase their hours and 33% agreed that the lack of childcare was a barrier to employment. 68% of respondents agreed that they knew where to go to find information on childcare, whilst only 38% knew where to get information relating to financial assistance for childcare. 35% disagreed that there was enough Welsh medium childcare available, with the majority of respondents stating they didn't know but 72% agreed that there was enough childcare available in the language of their choice. Parental views on the childcare on offer tends to be consistent across all areas of Monmouthshire; there were no obvious issues particular to one geographical area.

7.2.2. Summary of Key Strengths and Weaknesses

Strengths:

- Childcare provision is of good quality, particularly childcare available during term time.
- Childcare provision is well located and caters for the needs of most children.
- Childcare is generally reliable.
- The majority of respondents know where to go to access childcare information.

Weaknesses:

- The poor response rate to the parental survey means it is extremely difficult to make conclusive judgements.
- More than half of respondents felt that the choice of childcare available is limited.
- Affordability is the most common response in relation to improvements required and the cost of childcare is stated as a reason for not using childcare.
- Almost half of respondents agreed that there is not childcare available at the times they require it and this was stated as a reason for not using childcare. Respondents would like there to be more childcare available before 8am and after 6pm and at different times during school holidays, with a very small minority requiring overnight or weekend care.
- There is not adequate Welsh medium childcare available.
- Less than half of all respondents know where to access information about financial assistance for childcare.

7.3. Demand for Childcare Provision

7.3.1. Analysis of Demand for Childcare Provision

- Range of services required - Only 11 respondents stated that they required additional childcare places; 2 required a childminder in Abergavenny and Usk & Raglan, 3 required full day care in Usk & Raglan and 1 in Abergavenny, 1 required sessional care in Chepstow, 1 required a crèche in Monmouth, 1 required wrap around care in Chepstow and 2 required out of school care in Usk & Raglan. The majority of respondents requiring a childminder or full day care wanted full day nursery; those requesting sessional care needed morning playgroup places and most of those requesting out of school care needed before school care. Open access play provision was required during school holidays in Usk & Raglan.

- Number and type of childcare places required (full time, part time, ad-hoc) - 14% of places were required on a full time basis for children under 18 months of age, 76% part time and 10% on an ad hoc basis for children aged 8 years and over.
- Number of places required by children who have special educational needs or who require specialist care due to a disability - There were no places required for children who have special educational needs or a disability.
- Number of places required by language category - Of the 11 respondents requiring additional childcare, 6 requested English provision, 4 requested English with some bilingual elements and 1 requested other but didn't specify a language.
- Childcare times, including the number offering flexible childcare hours and range of session lengths - There was no particular pattern to the hours of childcare requested, although the most common response was 8am – 6pm. There was no requirement for childcare after 6pm or overnight and only 3 respondents required childcare between 7am and 9am.
- Age range of children for whom childcare is required - The age range of children requiring childcare varied greatly and there wasn't a noticeable geographical pattern. An equal number of places were required for children under 2 years of age with childminders and full day care providers; sessional care was only required for 2 year olds; out of school care was required for children aged 5 – 7 years and open access play provision for children aged 8 – 11 years and 12 – 14 years.
- Location of childcare required – Almost all respondents requiring a childminder, sessional care or open access play provision wanted this to be close to home. Responses in relation to full day care included close to home, close to work and near to child's school; out of school childcare was required close to parent or carer's place of work or study.

7.3.2. Summary of Key Strengths and Weaknesses

- Apart from open access play provision in Usk & Raglan, crèche facilities in Monmouth and slightly earlier opening times in a few areas, there was no childcare required that is not currently available. Although respondents stated previously that they required childcare at different times of day, this didn't seem to be reflected in their future requirements for childcare.

7.4. Barriers to Childcare Provision

7.4.1. Accessibility of Childcare Provision

- The majority of stakeholders were of the opinion that the quality, range, availability, location and suitability of childcare provision in Monmouthshire is mostly good and in some cases it is excellent.
- Affordability and flexibility of childcare provision is generally considered to be satisfactory; although both are referred to by parents and employers as barriers to taking up childcare.
- PACEY Cymru believe that Monmouthshire Local Authority recognises the importance of childminders in supporting the delivery of sufficient, accessible and quality childcare services for families across Monmouthshire, including providing unsocial hours for working parents and for families in need.
- The overall opinion is that the range of Welsh medium / bilingual childcare provision is poor or satisfactory at best.
- In a recent survey conducted across Wales by Clybiau Plant Cymru Kids Club, 35% of respondents wished to access more holiday care, 30% claimed that suitable holiday childcare was not available and 17% identified cost as a barrier to them accessing childcare.
- Across Wales, occupancy rates of full day nurseries has dropped from 69% in 2015 to 67% in 2016 and sustainability is an issue with rising costs and limited confidence in running a business.
- Continued funding is required to sustain existing childcare provision and to create new provision, where required.
- Two of the local employers stated that they have recruitment and retention issues due to childcare; these employers both employed shift workers and expected staff to work weekends.
- One employer stated that most employees use partners or family to look after children as the childcare provision is not available at the times they require it; another claimed that childcare was too expensive for their employees.

7.4.2. Barriers Experienced by Specific Target Groups

(i) Working Parents

- Lack of flexibility and affordability are the main barriers experienced by working parents, particularly those that work atypical hours such as shift workers and those that work at weekends.
- Not all childcare settings are registered with CSSIW so parents can't access the childcare element of Working Tax Credits. Sufficient training and support should be provided to enable settings to register with CSSIW.
- Many working parents require full day care and this is not currently available through the medium of Welsh.
- The Welsh Government free early years and childcare offer for 3 & 4 year olds would assist working families and low income families.

(ii) Parents seeking work or training opportunities

- Monmouthshire Housing Association believe that the affordability, flexibility and suitability of childcare provision in Monmouthshire is a barrier for the families that they deal with. Crèche facilities and bursaries are required in order for parents to access training opportunities.
- PACE provide funding for childcare to support parents who are seeking work or training opportunities.

(iii) Unemployed Households

- No stakeholders referred to this as a barrier as the majority of unemployed households don't use childcare, apart from those entitled to free Flying Start childcare or funded Early Years Education.
- Mudiad Meithrin pointed out that Welsh medium Flying Start provision should be available in the south of the county as well as the north.

(iv) Low income families

- Affordability is a barrier for low income families and some stakeholders felt that assisted places are required in order to enable low income families to access childcare provision.

(v) Lone parents

- No stakeholders referred to this as a barrier to childcare.

(vi) Families from ethnic minority backgrounds

- This does not seem to be an issue in Monmouthshire as there are very few families from ethnic minority backgrounds and none of the parents/carers or stakeholders referred to it throughout the consultation process.

(vii) Families with children who have special educational needs or a disability

- Provision for children with special educational needs or a disability is very good in Monmouthshire and financial support is available to employ additional staff to integrate these children within the setting; therefore, this was not mentioned by any stakeholders as a barrier.

8. Early Years Part Time Education (Foundation Phase) and Flying Start Provision

8.1. Analysis of Early Years Part Time Education (Foundation Phase)

- Number of childcare providers funded to provide Early Years Part Time Education - We currently have 27 childcare providers funded to provide Early Years Education; of these, 16 are registered as full day care and 11 are registered as sessional care. We don't currently use childminders to deliver Early Years Education in Monmouthshire. The Early Years Education Providers are spread throughout all areas of Monmouthshire. There is only 1 sessional care provider that operates through the medium of Welsh; this is located in Abergavenny.
- Number of schools funded to provide Early Years Part Time Education - There are currently 12 LA schools with nursery classes delivering Early Years Education, there is also 1 private school funded to provide Early Years Education in Monmouth. There are no schools in Usk & Raglan with LA nurseries, although one has a childcare provider on site. The Welsh schools in Abergavenny and Caldicot have a nursery class but there is no Welsh medium Early Years Education provision in Chepstow, Monmouth or Usk & Raglan.
- Attendance profile of children attending provision (childcare providers and schools) - The overall take up of places is very good when compared with population figures, particularly in Abergavenny and Caldicot. In Abergavenny and Chepstow, there are more children accessing their Early Years Education in LA schools; whereas in Monmouth, Caldicot and Usk & Raglan there are more children using childcare providers.
- Weekly attendance profile of children attending provision funded by childcare providers - The number of children attending Early Years Education provision is very similar on each day of the week, although it is generally lower on a Friday and it is slightly lower on a Monday in Abergavenny only.
- Number of childcare places filled, required and available - There are currently 1,604 Early Years Education places available in Monmouthshire; 886 of these places are in childcare settings, 690 are in LA schools and 28 are in a private school. Take up of these places ranges from around 52% in the autumn term to 78% in the summer term when there are the highest number of eligible children. Take up of places is monitored by geographical area on a termly basis and it has been consistent for a number of years. Additional childcare settings are only approved to provide Early Years Education when a need has been highlighted in a specific geographical area to ensure there are sufficient spaces, whilst keeping surplus places to a minimum to ensure sustainability of settings and schools.

- Number of parents not claiming their free entitlement and reasoning – Less than 5% of respondents stated they were not claiming their free entitlement to Early Years Education. The main reason given for this was that their child was already in full time education; however, this is not an option in Monmouthshire so it appears that parents have not understood the question. Only 2 parents claimed that they were not aware of this entitlement and another that the timings of the sessions didn't meet their needs. Based on the take up of places when compared with live birth data, there are not a large number of Monmouthshire children not accessing their free entitlement to Early Years Education. We are aware of some children accessing this provision in neighbouring authorities due to the location of parents' place of work or extended family that provide support with childcare.
- Childcare required by parents to enable them to claim their full entitlement – The only additional childcare required by parents who completed the survey to enable them to claim their full entitlement was before school care and this was only mentioned by 1 parent. We are aware that some families are unable to access provision in LA nursery classes unless there is wrap around provision on site, as they require full day care or longer hours. Many of our childcare providers have extended their hours and registered as full day care providers in order to meet this need.

8.2 Summary of Key Strengths and Weaknesses

Strengths:

- There is a good range of Early Years Education providers so parents can choose the type that best suits their needs.
- Monmouthshire has cross border arrangements in place with all six neighbouring authorities (in England and Wales) so parents can access provision across the border if this is more convenient.
- Provision with childcare providers is very flexible; entitlement can be shared across more than one setting and there isn't a minimum number of sessions that must be taken up in order to claim funding, as in some local authorities.
- Take up of Early Years Education is very good.

Weaknesses:

- There is no flexibility within LA schools, children must attend for either 5 morning or 5 afternoon sessions and many schools don't have wrap around provision on site.
- There is a lack of Welsh medium Early Years Education within childcare settings.

8.3. Analysis of Flying Start Provision

- Number of childcare providers (broken down under full day care, sessional care, childminder) funded to provide Flying Start, including Flying Start only provision - There are currently 6 providers funded to provide Flying Start, 3 in Abergavenny and 1 each in Caldicot, Chepstow and Monmouth. There is no Flying Start provision in Usk & Raglan as there are no eligible children in this area. All of the Flying Start providers are registered as sessional care; there are no full day care or childminders providing Flying Start childcare in Monmouthshire. The settings in Caldicot, Chepstow and Monmouth only offer Flying Start places, whereas all 3 settings in Abergavenny offer mixed provision. One of the settings in Abergavenny is Welsh medium but the other 5 are English with some bilingual elements.
- Weekly attendance profile of children attending Flying Start provision - According to the data, all places are taken up on a full time basis.
- Number of places filled and required - In Abergavenny, morning places are more popular than afternoon places; there is no choice in Caldicot or Chepstow as there is only one session available each day. The majority of places are filled in Monmouth and Chepstow so we are considering approving additional providers to accommodate Flying Start children in these areas; there are currently sufficient places in the other areas.
- Number of parents living in a Flying Start area, who are accessing free childcare - Take up of places, as per the parental survey, is only at 50%; however the reasons given for not accessing free childcare suggests that most of these children are not actually eligible. According to data supplied to Welsh Government, the actual take up of places in 2015/16 was 82%.
- Number of parents not accessing free childcare and reasoning – The main reasons given for not accessing free childcare is that they don't want to use that setting, parents work and require full day care and they are already settled in another setting.

8.4. Summary of Key Strengths and Weaknesses

Strengths:

- Take up of Flying Start places is very good and places are usually taken up on a full time basis.
- In Abergavenny, parents can choose between 3 different settings, including Welsh medium childcare.
- In Monmouth and Abergavenny, parents can access Flying Start childcare in the morning and afternoon sessions.

Weaknesses:

- The type of childcare available providing Flying Start places is limited to sessional care and doesn't meet the needs of working parents.
- Welsh medium Flying Start childcare is only available in Abergavenny.

9 Free Breakfast Club Provision

9.1 Analysis of Free Breakfast Club Provision

Area	Name of Schools	Average Attendance
Abergavenny	Cantref Primary	36
	Cross Ash Primary	27
	Deri View Primary	61
	Gilwern Primary	66
	Llanfoist Primary	58
	Llantilio Pertholey Primary	65
	Llanvihangel Crucorney Primary	24
	Our Lady & St. Michael's RC Primary	46
	Ysgol Gymraeg Y Fenni	41
<i>Abergavenny Total</i>		<i>424</i>
Monmouth	KyminView Primary	41
	Llandogo Primary	8
	Osbaston Primary	45
	Overmonnow Primary	66
	Trellech Primary	40
	<i>Monmouth Total</i>	

Chepstow	Pembroke Primary	53
	Shirenewton Primary	32
	St. Mary's RC Primary	59
	The Dell Primary	112
	Thornwell Primary	58
<i>Chepstow Total</i>		<i>314</i>
Caldicot	Archbishop Rowan Williams Primary School	51
	Castle Park Primary	43
	Dewstow Primary	48
	Magor Primary	87
	Rogiet Primary	57
	Undy Primary	76
	Ysgol Gymraeg Y Ffin	37
<i>Caldicot Total</i>		<i>399</i>
Usk & Raglan	Usk Primary	71
<i>Usk & Raglan Total</i>		<i>71</i>
TOTAL		1,408

There are only 3 primary schools in Monmouthshire that don't have a free breakfast club on site; 2 of these schools have a fee paying before school childcare club on site instead.

10. Working Tax Credit/ Universal Credit and Employer Supported Childcare/ Tax Free Childcare

10.1. Analysis of Working Tax Credit/ Universal Credit and Employer Supported Childcare/ Tax Free Childcare

Only 68 respondents answered the question relating to Working Tax Credit or Universal Credit on the parental survey and 55 respondents answered the question relating to Employer Supported Childcare, therefore percentages have been given as well as actual numbers; however, it is still difficult to gain any meaningful information.

- Number of respondents claiming per childcare provision and number of children attending - Only 10 respondents stated that they were claiming the childcare element of Working Tax Credit or Universal Credit; however this equates to 15% of those that answered this question on the parental survey. There were a total of 16 children for whom the tax credit was being claimed, of these 4 were cared for by a childminder (25%), 5 were attending full day nursery (31%) and 7 were attending after school club (44%). 19 respondents (35%) stated that they were claiming tax free childcare through an Employer Supported Scheme for a total of 24 children; of these 6 were cared for by a childminder (25%), 3 were attending full day nursery (12%), 5 were attending after school club (21%), and 10 didn't specified the type of childcare being used (42%).
- Number of respondents intending to claim in future and childcare requirements - Only 4 of the 68 respondents intend to claim the childcare element of Working Tax Credit or Universal Credit; this equates to 6% and 18 are unsure if they will claim in the future (26%). Those that intend to claim require a mixture of full day nursery and after school childcare. Only 6 of the 55 respondents (11%) intend to claim tax free childcare through an Employer Supported Scheme in the future and 8 (15%) are unsure if they will claim. Half of these intend to use after school childcare and almost half require full day nursery, with one respondent requiring a childminder.
- Number of respondents not claiming and reasoning - 58 of the 68 respondents (85%) stated that they were not claiming the childcare element of Working Tax Credit or Universal Credit. The main reasons for not accessing this were they know they are not eligible (45%), they are unsure whether they are eligible (18%) and they didn't know about it (20%). Other reasons given include their circumstances change too often (7%), they choose not to claim (2%), the process is too complicated (2%), they don't have time to claim (2%) and they don't pay for childcare (2%). 36 of the 55 respondents (65%) were not claiming tax free childcare through an Employer Supported Scheme. The main reasons for not accessing this were they didn't know about the scheme (19%), they know they are not eligible (19%) and they are unsure whether they are eligible (11%). 2 respondents have chosen not to claim it (6%) and 1 does not pay for their childcare (3%). 42% of these respondents didn't give a reason for not claiming it.

10.2. Summary of Key Strengths and Weaknesses

Strengths:

- The availability of tax free childcare reduces the barrier for those wishing to return to work or enter employment.

Weaknesses:

- According to the parental survey, take up of the childcare element of Working Tax Credit or tax free childcare through Employer Supported Schemes is low in Monmouthshire.
- A high proportion of parents in Monmouthshire are not eligible for either of these schemes or they are not available.
- There were a significant number of respondents who were not aware of these schemes and didn't know if they were eligible.

11. Sustainability

Start-up grants are currently available for out of school childcare clubs through the WG Out of School Childcare Grant; there is also a Development Worker funded through this grant to provide business support and to assist them with the registration process. Unfortunately, the terms and conditions of this grant do not allow for it to be used for pre-school childcare; hence, there is no financial support available to assist these settings with start-up costs. Childminders are entitled to financial support equating to almost £500 in total; this is made up of the cost of the CYPOP5 course, a PACEY business start-up pack including public liability insurance and a grant of £100 towards health and safety equipment.

Sustainability is becoming more of an issue for childcare settings with increases in the minimum wage, rent costs, utilities and business rates. This is a particular issue for approved providers due to the fact that there has not been an increase in the Early Years Education funding for many years so they have had to charge top up fees in order to remain sustainable. In addition, Monmouthshire is largely a rural authority, so lack of numbers can cause sustainability issues for some settings. Sustainability grants are available for all childcare settings; however, they have to be able to evidence how they will use this funding to enable them to become sustainable in the future. Over the past 3 years, an average of six settings per year have received a sustainability grant and the majority of these have been out of school childcare settings.

There is a fair amount of mandatory training that must be completed by childcare workers on a regular basis as well as CPD training; although these courses are often facilitated by the Local Authority, they are not usually funded and this places an additional burden on settings. Providing appropriate support for children with Special Educational Needs or a disability is another issue as, although funding is provided to settings to provide additional support, this is restricted to 2 hours per session for a maximum of 5 sessions a week, so there are generally further costs incurred by the setting.

CSSIW de-registration is not a major issue in Monmouthshire; there is a fairly high turnover of childminders but this is mainly due to the nature of the job rather than sustainability issues. The main reason for the closure of other childcare settings within Monmouthshire has been a lack of demand for places or an inability to find suitably qualified staff.

There is financial support available to parents to assist with the cost of childcare such as the childcare element of Working Tax Credit and tax free childcare through an Employer Supported Scheme, however take up of these schemes is relatively low in Monmouthshire. Assisted places schemes used to be funded through the WG Cymorth Grant to enable low income families to access free childcare. Unfortunately, these projects were de-commissioned in September 2011 and, since then, there has not been any financial support available from the Local Authority to assist families with the cost of childcare.

12. Cross Border

Monmouthshire County Council has cross border arrangements in place for Early Years Education with all six neighbouring authorities, four in Wales and two in England.

The number of Monmouthshire children that we are aware of that accessed their Early Years Education outside of the Local Authority during the summer term 2016 was as follows:

Local Authority	Number of Monmouthshire Children
Newport	15
Torfaen	15
Blaenau-Gwent	0
Powys	1
Gloucestershire	0
Hereford	36
TOTAL	67

The breakdown of children from outside the Local Authority that accessed their Early Years Education within Monmouthshire during the summer term 2016 was as follows:

Local Authority	Number Attending Non-Maintained Setting	Number Attending LA Nursery	TOTAL
Newport	11	19	30
Torfaen	2	1	3
Blaenau-Gwent	4	1	5
Powys	1	0	1
Gloucestershire	16	2	18
Hereford	5	0	5
TOTAL	39	23	62

The parental survey didn't provide us with any useful information in relation to cross border arrangements for childcare as only one respondent stated that they were utilising childcare outside of the Local Authority, in Blaenau-Gwent.

We consulted with colleagues in nearby Local Authorities as part of this process to enquire in relation to any contact that they have had with Monmouthshire residents accessing childcare within their Local Authority or making enquiries and we received the following responses:

- Torfaen Family Information Service have been contacted by three Monmouthshire families, two of whom were enquiring about leisure activities and one about out of school childcare and holiday clubs. They have one childcare setting close to the border that is accessed by several Monmouthshire families and has transition arrangements with a Monmouthshire primary school.
- Blaenau-Gwent County Council reported that they are aware of three Monmouthshire families that utilise childcare provision within Blaenau-Gwent. Reasons given for this are that it is closer to work, grandparents live in Monmouthshire and help with childcare and it has better Estyn results.
- Powys County Council are aware of one Monmouthshire child that is accessing their Early Education at a setting that is close to the Monmouthshire border.
- Gloucestershire County Council are not aware of any Monmouthshire families accessing provision within their authority.
- Herefordshire Family Information Service reported that they have been contacted by three Monmouthshire families and have signposted them to the relevant information.
- Caerphilly Family Information Service have been contacted by four Monmouthshire families, two of whom were signposted to parent & toddler activities, one to youth advocacy services and one to full day childcare.

All of this information suggests that the vast majority of Monmouthshire residents are able to access suitable childcare or Early Years Education provision within the Local Authority.

13. Workforce Development

13.1 Analysis of Workforce Development

- Only 15% of the childcare workforce in Monmouthshire have no relevant childcare qualification or haven't specified what qualification they have. Of these, 2% are currently studying towards a relevant level 2 qualification and 29% towards a level 3 qualification, hence a maximum of 10% of the workforce have no relevant childcare qualification and are not working towards a qualification.
- According to the SASS data, the childcare type with the highest percentage of unqualified staff is childminders (27%); however, childminders are unable to obtain registration until they have completed a CYPOP5, so we presume this refers to those that haven't completed a full level 2 qualification. 45% of childminders have a level 3 qualification and 25% have a level 4 or higher. 27% of childminders are currently working towards a higher level childcare qualification.
- Only 10% of the childcare workers within full day care settings are unqualified and 31% of these are currently working towards a level 3 qualification; 9% of the full day care workforce are qualified to level 2, 63% are qualified to level 3 and 18% are qualified to level 4 or higher. 23 staff (18%) are currently working towards a higher level qualification.
- 14% of childcare workers in sessional care settings are unqualified and 42% of these are currently working towards a relevant level 3 qualification. 5% of sessional care workers are qualified to level 2, 60% are qualified to level 3 and 22% are qualified to level 4 or higher. 24% of childcare workers are currently working towards a higher level qualification.
- All staff working in the crèche are qualified, 50% at level 3 and 50% at level 5; however, there is only one crèche registered in Monmouthshire so this is only 4 childcare workers.
- The figures for out of school childcare relate mainly to registered settings; the percentages would be lower if all unregistered settings were included as the lack of suitably qualified staff is often a barrier to registration. 17% of workers in out of school clubs are unqualified and only 2 of these (18%) are working towards a level 3 qualification; 23% are qualified to level 2, 45% are qualified to level 3 and 14% are qualified to level 4 or higher. 15 out of school childcare workers (23%) are currently working towards a higher level qualification.

- The most popular response in relation to additional training undertaken was Foundation Phase modules; this was followed by Manual Handling, First Aid at Work and Welsh courses. The majority of the other training mentioned related to additional needs or health & safety.
- There are approximately 100 childcare workers who will require First Aid training or Food Hygiene training in 2017 as their existing certificate will expire during the next 12 months; the figure for Child Protection training is 75 childcare workers. In 2018, there will be around 65 childcare workers requiring First Aid training or Food Hygiene training and 100 requiring Child Protection training.
- Although mandatory training is no longer funded by the Local Authority, a training programme is being developed to ensure that there are sufficient courses available across Monmouthshire that can be accessed by the childcare workforce. There are also a number of non-mandatory training courses that are being offered free of charge to enable childcare workers to continue their professional development.

14. Results of Consultation with Stakeholders (as outlined in section 2)

The key findings from consultation undertaken with key stakeholders is summarised below:

Welsh Medium Education Forum

- Location, flexibility, affordability and quality of childcare provision on the whole is good.
- Range of Welsh medium / bilingual childcare provision is poor or satisfactory at best.
- There is a need for more Welsh medium childcare provision, in particular full day care to meet the needs of working parents especially in the south of the county.
- There is reasonably priced out of school childcare available on the site of both Welsh medium primary schools, as well as nearby schools and childminders. The Welsh medium primary school in the north of the county also provides affordable wrap around childcare on site for nursery aged pupils.
- Identifying suitably qualified Welsh speaking staff to work in Welsh medium childcare settings is a problem and more training is required.
- Links between organisations need to be developed to improve transition, particularly links with Health Visitors.
- Advertising is needed to ensure parents are aware of the availability and benefits of Welsh medium childcare and education.

Play Monitoring Group

- Changes to the registration process have meant that it is not financially viable to run holiday play schemes as they were previously, particularly in relation to identifying suitably qualified staff to work in them.

Umbrella Organisations

- Clybiau Plant Cymru Kids' Clubs were unable to provide a response specific to Monmouthshire but general comments were:
 - Continued funding is required to sustain current out of school childcare provision and to create new provision, where required.
 - In a recent survey conducted across Wales, 35% of respondents wished to access more holiday care, 30% claimed that suitable holiday childcare was not available and 17% identified cost as a barrier to them accessing childcare.
 - Sufficient training should be provided to enable settings to register with CSSIW so that parents can access tax credits.
 - Assisted places are required to enable low income families to access childcare provision.
 - 1:1 support is essential to support children with a disability and to integrate them within the childcare settings.
 - A national marketing campaign is needed to promote childcare and inform parents of the benefits.
- NDNA

- Quality, range, availability, location and suitability of childcare in Monmouthshire is good; affordability and flexibility is satisfactory whilst bilingual or Welsh provision is poor.
- Across Wales, occupancy rates have dropped from 69% in 2015 to 67% in 2016 and sustainability is an issue with rising costs and limited confidence in business.
- The Welsh Government free early years and childcare offer for 3 & 4 year olds would assist working families and low income families.
- Mudiad Meithrin
 - Even though Monmouthshire is on the border with England, this shouldn't prevent access to Welsh medium childcare and education.
 - The Eisteddfod had a positive response and it is important to continue to raise awareness of the benefits of bilingualism.
 - There is only one cylch meithrin in Monmouthshire at present but, before expanding, the first step is to develop successful Ti a Fi groups. There are currently five Ti a Fis in different areas of Monmouthshire and they are looking to open a sixth in the near future.
 - There needs to be a competent Welsh speaking workforce in readiness for the free childcare offer.
 - Welsh medium Flying Start provision should be available in the south of the county to support low income families.
- PACEY
 - PACEY Cymru believe that Monmouthshire LA recognises the importance of childminders in supporting the delivery of sufficient, accessible and quality childcare services for families across Monmouthshire, including providing unsocial hours for working parents and for families in need.
 - Support provided for childminders includes childminder briefing sessions, funding for CYPOP5 training, business start-up packs, £100 start up grant for health & safety equipment, child protection training and an advice line.
 - Childminders are able to advertise through the Family Information Service and have their own Facebook group.
 - Further funded CPD training and wider promotion of availability of grants would be beneficial.
 - No childminders are currently providing Foundation Phase Early Years Education or Flying Start childcare.

Relevant Local Authority Departments

- Monmouthshire Housing Association believe that the affordability, flexibility and suitability of childcare provision in Monmouthshire is less than satisfactory. Crèche facilities and bursaries are required in order for parents to access training opportunities.
- Monmouthshire Planning Department have had three applications for planning permission to convert existing premises into day nurseries since 2014, all in the Abergavenny area and all were successful and are now up and running. Planning

permission is generally not required for childminders in Monmouthshire.

- Primary Schools
 - Kymin View Primary in Monmouth have a playgroup and free breakfast club on site, there are also childminders collecting from the school but they are all at full capacity. Parents have requested an after school club and wrap around childcare for nursery but affordability may be an issue for some parents.
 - Magor VA Primary and Undy Primary in the Caldicot area both have a playgroup on site offering morning and afternoon sessions and wrap around childcare for the school nursery; they also have free breakfast clubs and Magor has fee paying before school care. Holiday childcare was available at both schools during the summer holidays. Childminders, a nearby after school club and two local day nurseries collect children from both school. Feedback from parents are around more flexibility for the school nursery and longer hours of childcare.
 - Ysgol Gymraeg Y Fenni in Abergavenny has a cylch meithrin on site offering morning sessions and wrap around childcare for the school meithrin; they also have a Welsh medium free breakfast club and after school club. Childminders, day nurseries and a nearby English medium after school club collect from their school, as their after school club is unable to operate at full capacity due to a shortage of suitably qualified Welsh speaking staff.
- Healthy Schools and Pre-schools
 - Provision in the majority of settings is good, if not excellent.
 - There is a good range of accessible, flexible childcare provision.
 - Welsh language provision is satisfactory to poor.

Family Information Service

- Monmouthshire Family Information Service (FIS) currently supplies information and advice about childcare, Early Years provision and local services for children and young people. The FIS continue to promote new and existing childcare providers and places through the telephone, email, website, social media and outreach with the majority of enquiries being received through the website and through facebook.
- Feedback is received through quick polls on contact us, have your say and submit a service website forms, through feedback forms sent via email and post and by direct contact at outreach events.
- The results of these enquiries are as follows:
 - 98.7% of enquirers are satisfied with the information they have received through the FIS.
 - 73% of enquirers use childcare that they found out about through the FIS.
 - 65.2% of enquirers have been able to make an informed choice about childcare and activities because of the information they have received through the FIS.
 - There have been no enquiries from people who have been unable to access some form of childcare.

Local Employers

- Responses were only received from four local employers, ranging in size from 10 employees to 17 employees.
- All settings offer flexible working arrangements for parents/carers such as part time positions and flexible working hours, as well as time off to attend appointments and children's concerts.
- Two of the employers stated they have recruitment and retention issues due to childcare; these employers both employed shift workers and expected staff to work weekends.
- One employer stated that most employees use partners or family to look after children as the childcare provision is not available at the times they require it; another claimed that childcare was too expensive for their employees.

Focus Groups with Children in Out of School Childcare Provision

- Focus groups were held in five different out of school childcare settings and a total of 142 children aged between 4 and 11 years of age contributed to this consultation activity; the results from this consultation were as follows:
 - 88% of children liked their setting and the majority of the activities provided.
 - 92% of children liked the staff working at their setting.
 - 82% of children enjoyed being with children of different ages.
 - 80% of children said they attended the setting because their parents told them they had to.
 - 62% of children confirmed that they wanted to attend.
 - 53% of children would prefer it if the sessions were longer.
 - 47% of children stated they would prefer to play at home than attend their childcare setting.
 - 82% of children attend out of school care because their parents have to work.
 - 34% of children knew they would have to attend alternative childcare provision if this wasn't available.
 - 69% of children also attend other childcare provision such as before school clubs, holiday clubs and childminders.
 - 42% of children attend a particular club because it is close to home.
 - 22% of children attend every day that it is open.
 - 24% of children are collected by someone other than their parents.
 - 54% of children thought their setting could be improved in some way.

15. Gap Analysis & Areas for Improvement

On the whole, the quality of childcare provision in Monmouthshire is very good and there is sufficient provision to meet the needs of most families; however, there are some gaps in provision that have been identified and need to be addressed.

Types of Childcare Available

Based on the data provided by childcare settings through their SASS return, particularly in relation to vacancies and waiting lists, then comparing this with the demand for childcare as evidenced through parental surveys and consultation responses from stakeholders, there appears to be sufficient provision of childminders, full day care, sessional care and after school care throughout Monmouthshire. There is a good range of services offered by these settings and they are generally flexible enough to meet the needs of families.

There are free breakfast clubs at more than 90% of primary schools so there is very little demand for before school care and there is only one primary school in Caldicot that doesn't have some form of before school care on site.

Sessional care is not available in Usk & Raglan but there are full day care settings and childminders in this area providing sessional care, so it is not a significant gap.

There is only a limited supply of holiday clubs and they are not available in all areas of Monmouthshire; however, many childminders and full day care settings are also providing holiday care.

Open access play provision is only available during school holidays and there is no open access play provision in the Usk & Raglan area. None of the open access play provision is registered so it is limited to two hours in length.

There is only one registered crèche in Monmouthshire and this is restricted to children with a disability; according to consultation responses, this gap in provision is a particular issue for parents living on the army barracks just outside Chepstow and for parents wanting to access training opportunities.

There are no nannies in Monmouthshire registered through the voluntary approval scheme and we have no information relating to any nannies that are operating within the authority, although we know that there are parents using a nanny for childcare.

Areas for Improvement:

- *There needs to be an increase in the number of holiday clubs and the range of childcare available during school holidays.*
- *Open access play is required during term time, as well as school holidays, and this provision needs to be registered in order to increase the length of sessions offered.*
- *Crèche facilities are required throughout Monmouthshire.*
- *More information is needed in relation to nannies operating in Monmouthshire.*

Age of Children for whom Childcare is Available

Childminders are able to accommodate the largest age range of children, from 0 – 17 years; however, there is currently no demand for places for children aged 15 – 17 years and very little demand for children aged 12 – 14 years.

There are very few children aged under 5 accessing holiday clubs; nevertheless, most childminders and more than half of the full day care settings offer holiday care and there are places available in all areas of Monmouthshire for this age group for 12 weeks of the school holidays, with the exception of Christmas week.

There are no significant areas for improvement.

Affordability of Childcare

Affordability is highlighted by parents, employers and stakeholders as a barrier to childcare.

39% of out of school clubs and all open access play provision is unregistered, so parents are unable to access tax credits.

Take up of the childcare element of Working Tax Credits and Employer Supported Schemes is poor in Monmouthshire and 62% of respondents claimed that they didn't know where to go to access information relating to financial assistance for childcare.

Areas for Improvement:

- *Out of school clubs and open access play providers should be encouraged and supported to register with CSSIW.*
- *The availability of Working Tax Credits and Employer Supported Schemes for childcare need to be more widely promoted.*

Times at which Childcare is Available

Many settings offer a range of setting lengths in order to meet the individual needs of families during the typical working day.

There are very few providers offering childcare before 8am and after 6pm and most of these are childminders; there is no childcare available after 10pm and only one childminder offers weekend care.

47% of respondents to the parental survey agreed that there was not childcare available at the times they required it and that this lack of flexibility was a barrier to accessing childcare. Two local employers with shift workers and staff working weekends confirmed that this caused them recruitment and retention issues.

Area for Improvement:

- *More provision is required during atypical hours such as before 8am, after 6pm, overnight and at weekends.*

Location of Childcare

The geographical distribution of childcare provision in Monmouthshire is good and is relative to the population and characteristics of each area; this conclusion is reinforced by the opinions of stakeholders who assessed the location of childcare in Monmouthshire as good or excellent.

Where there are gaps, these tend to be in relation to the type of childcare, as referred to above, rather than the location of the childcare. In some areas there may appear to be a lack of a particular type of childcare, such as holiday care in Caldicot and Monmouth, but generally these services are provided in the area by another childcare type so the demand is still being met.

The only exception to this is the lack of open access play provision in the Usk & Raglan area during the school holidays.

Area for Improvement:

- *Open access play provision is required in the Usk & Raglan area during school holidays and in all areas during term time.*

Welsh Medium Childcare Provision

Provision of Welsh medium childcare is described as being poor by the majority of stakeholders and 65% of parents responded that there was not enough Welsh medium childcare available.

There is a significant shortage of Welsh medium childcare in Monmouthshire; there is only one cylch meithrin in Abergavenny offering sessional care and one after school club attached to the Welsh school in Abergavenny. There is no full day care, childminders, holiday care or open access play provision operating through the medium of Welsh.

All full day care and sessional care providers, apart from the cylch meithrin, describe themselves as English with some bilingual elements. Nevertheless, the majority of childminders and out of school providers and all open access provision is described as being English only.

Area for Improvement:

- *More Welsh medium childcare of all types is required in all areas of Monmouthshire, particularly those providing full day care during term time and school holidays.*
- *All childcare settings should be encouraged to provide at least some bilingual elements.*

Childcare Provision for Different Language Categories

Provision of childcare in languages other than English or Welsh is not available in Monmouthshire but neither is there a demand.

According to the 2011 Census, 98% of the population of Monmouthshire are British and only 2.1% of respondents to the parental survey spoke languages other than English or Welsh and these were varied, there was no particular pattern. Hence, it would be difficult to develop sustainable childcare provision in different languages and it is not necessary to meet the current demands of parents in the authority.

There are no significant areas for improvement

This gap analysis will be used to inform future work, to identify priorities and to allocate funding.

16. Childcare Sufficiency Assessment – Action Plan

The Action Plan has been drawn up in order to address highlighted gaps and to reduce barriers to accessing childcare that have been identified in this Childcare Sufficiency Assessment. Further detail is included within Annex 14.

Target	Why is it Required?	How will it be Achieved?	How will it be Monitored?	Timescale
Develop a Welsh medium childcare setting in the south of the county and increase the number of Welsh medium childcare places in the north of the county by 20%.	There is not sufficient Welsh medium childcare provision, in particular full day care, to meet the needs of working parents. We are required to actively promote Welsh medium education.	Monmouthshire Early Years will work closely with Mudiad Meithrin and the existing providers to expand the provision of Welsh medium childcare provision.	The number of Welsh medium childcare places is included in the Welsh Education Strategic Plan (WESP) and this is reviewed termly.	September 2017
Increase the opening hours of at least 1 existing childcare provider in each of the 5 areas to include atypical hours.	There is a lack of childcare available to meet the needs of parents who work atypical hours such as shift workers and those that work at weekends.	Offer financial incentives to encourage existing childcare providers to extend their opening hours and to provide childcare during atypical hours.	FIS will send update forms to childcare providers and the childcare supply will be updated accordingly and compared with the previous year.	March 2018
Register 5 new childminders across Monmouthshire and at least maintain the current level of provision.	There is a high turnover of childminders due to the transient nature of the job. Childminders are best placed to provide childcare during atypical hours.	Provide childminder briefing sessions and support through the registration process. Continue to offer financial support for CYPOP5 training and start-up grants.	Number of newly registered childminders as per CSSIW monthly reports will be monitored termly, along with the number of start-up grants awarded.	March 2018 and ongoing

Target	Why is it Required?	How will it be Achieved?	How will it be Monitored?	Timescale
Develop an additional 3 holiday childcare settings in different areas of Monmouthshire.	There is a need to increase the range of childcare available during school holidays to meet the needs of working parents.	Childcare Development Officer to work closely with existing providers to expand their provision. Offer development grants to cover start-up costs.	This will be included as a target for the Out of School Childcare Grant and monitored quarterly.	July 2017
Develop 2 registered crèches or encourage existing providers to offer crèche facilities.	There are no crèche facilities in most areas of Monmouthshire and there is a demand for this type of childcare.	Contact leisure facilities and existing providers to discuss the possibility of developing crèche facilities on site and offer financial support.	This will be included as a target for the Service Improvement Plan (SIP) and monitored quarterly.	March 2018
Increase the opening times of open access play provision to include half terms and Easter holidays.	Open access play is currently only available during the summer holidays and there is a demand for more of this type of childcare.	Work closely with the Play Monitoring Group to extend the provision of open access play across the authority.	This will be reviewed and monitored as part of the Play Sufficiency Assessment.	October 2017
Register 3 out of school clubs with CSSIW.	A significant number of out of school clubs are not registered with CSSIW so there is a limit to the number of hours they can operate each session and parents cannot claim Working Tax Credits.	Childcare Development Officer to work closely with existing out of school childcare settings to provide business advice and support them through the registration process.	This will be included as a target for the Out of School Childcare Grant and monitored quarterly.	March 2018

Target	Why is it Required?	How will it be Achieved?	How will it be Monitored?	Timescale
To provide Welsh training for 12 childcare workers.	To develop the Welsh language skills of childcare workers and to increase the number of childcare settings offering some bilingual elements.	Identify a suitable Welsh course, cover the cost of the training and promote with childcare providers	Attendance lists will be kept and follow up will be carried out to assess the impact this has had on their setting.	March 2018
Continue to promote the Family Information Service and advertise the availability of financial support to assist with the cost of childcare.	Affordability is the main barrier to accessing childcare. Take up of the childcare element of Working Tax Credits and Employer Supported Schemes is poor and some parents reported they didn't know where to find this financial information.	Monmouthshire Family Information Service will use the FIS website and social media such as facebook and twitter to promote tax credits and to provide information relating to financial assistance for childcare	The Family Information Officer produces monthly reports including details of promotional activities. Users of the FIS website complete evaluation forms.	December 2017 and ongoing
To include details of nannies on FIS website.	Monmouthshire Family Information Service currently holds no information relating to nannies.	Contact nanny organisations and use the FIS website and social media to enquire about nannies.	A review of childcare supply will take place on an annual basis and this will include nannies.	March 2018