



CYNGOR GOFAL CYMRU  
CARE COUNCIL FOR WALES

# Scoping and Mapping of the Early Years and Children's Services Workforce in Wales

Sponsored by  
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# 1. Introduction

This is the final report of a project to provide the Care Council for Wales with the information needed to define occupational standards and qualification requirements; and to improve the match between the needs of employers and what education and training providers deliver, within the early years and childcare sector.

The early years and childcare sector is one that has expanded in recent years and is likely to grow further. It is also a sector that is experiencing a great deal of change in terms of regulation and implementation of new policy and initiatives.

The current development of Integrated Centres, along with Community Focused Schools in Wales, the Kids' Clubs Project, Genesis Wales and the Flying Start initiative can provide real benefits to children and communities through the assimilation of open access play, early years education, community training, family support and childcare. However, to develop children's services in this way, a flexible, high quality and professional workforce is required.

For the first time, this report presents an analysis of the early years and childcare workforce in Wales; the current range of qualifications in the sector; and through consultation and engagement with stakeholders has sought to establish whether or not current arrangements are suitable to meet the needs of a developing and expanding field.

This report provides an overview of the project within which the following objectives have been met:

- Agreement of the scope of 'Early Years / Childcare' sector in Wales
- Identification of the current range of posts and associated qualifications, including National Occupational Standards, within the Early Years and Children's Services sector
- Mapping of current qualifications against posts within the early years and children's services sector
- Identification of gaps and articulation of known changes which will affect job roles
- Development strategies that address the identified gaps and changes as a priority.

In addition, data has been gathered from employers, practitioners and training providers that will enable both the Care Council for Wales and other strategic bodies in Wales to take informed policy decisions.

This report has been prepared by David Dallimore of Melyn Consulting. We would like to acknowledge and thank David Dallimore for completing the exercise and preparing this report to such a high standard. The Care Council for Wales is part of the Sector Skills Council, and a financial contribution was received through Skills for Care and Development for this project.

## Rhian Huws Williams

Chief Executive

Care Council for Wales



## 2. The scope of early years/childcare sector in Wales

In 2004, the Care Council for Wales became the Sector Skills Council for Care and Development and brought the workforce involved in the day care of under 8's into its core business. The extent of the sector is difficult to define, as there are many shared boundaries between care, education and play, as well as between what is termed 'formal' and 'informal' care. Whilst in the future, the Care Council will need to fully explore these issues and include further occupational groups, for the purposes of this project the scope of the early years and childcare workforce has been defined as:

“... those working in Early Years and Childcare services for children under eight years of age that are regulated by the Care Standards Inspectorate for Wales.”

There are 6 sub-groupings used by Care Standards Inspectorate (CSIW) that have been used throughout this report that refer to practitioners working in the following settings:

- Childminders
- Crèches
- Full Daycare
- Sessional Daycare
- Out of School Childcare
- Open Access Playschemes<sup>1</sup>

Although these are the general occupational roles that take place in groups, job titles vary. A full lexicography of job titles relating to commonly defined roles within each type of setting is set out in Appendix 1.

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<sup>1</sup> Open Access Playschemes are regulated by CSIW and SkillsActive represents Playworkers. However, there are close links between the 'care' and 'play' sectors that make it judicious to include data regarding Open Access Playscheme practitioners.

## 3. Research Outline

In establishing the size, scope and attributes of the early years and childcare workforce in Wales, a large-scale survey of both employers and practitioners was undertaken during the latter part of 2005 and early months of 2006.

### Sample Size

A 10% sample of all registered early years and childcare services for children under-eight was taken. The sample was broken down by the type of provision (using CSIW<sup>2</sup> definitions) and local authority area with consideration given to rural locations and also the language medium of settings. A full breakdown of the sample is shown in Appendix 2.

Sample targets were exceeded by a margin of between 5 and 12% providing a total sample of 432 settings and 1,764 practitioners.

### Sampling Tolerance

Those who responded represent only samples of employers and practitioners, therefore it cannot be certain that the figures obtained are exactly those that would have been if everybody had taken part ("true values"). The variation between the sample results and the true values can be predicted from examining the size of the samples on which results are based and the number of times a particular answer is given. The confidence with which this prediction can be made is usually chosen to be 95% – that is, the chances are 95 in 100 that the true value will fall within a specified range.

For example, with a sample size of 200 where 30% give a particular answer, the chances are 19 in 20 that the true value – which would have been obtained if the whole population had been interviewed – will fall within the range of +6 percentage points from the sample result i.e., between 24% and 36%.

In this research, whilst a 10% sample has been taken, with over 1,700 practitioners involved, the confidence interval is above 95%.

### Methodology

In consulting with the sample, a combination of telephone interviews, postal questionnaires and follow-up telephone interviews was used. All of the employers within the sample were contacted by telephone at least once. In some cases all of the consultation was undertaken through a telephone interview.

Data from surveys was entered into a database from which a range of queries were developed to present the data contained within this report.

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<sup>2</sup> Care Standards Inspectorate for Wales

# 4. The Childcare and Early Years Workforce in Wales

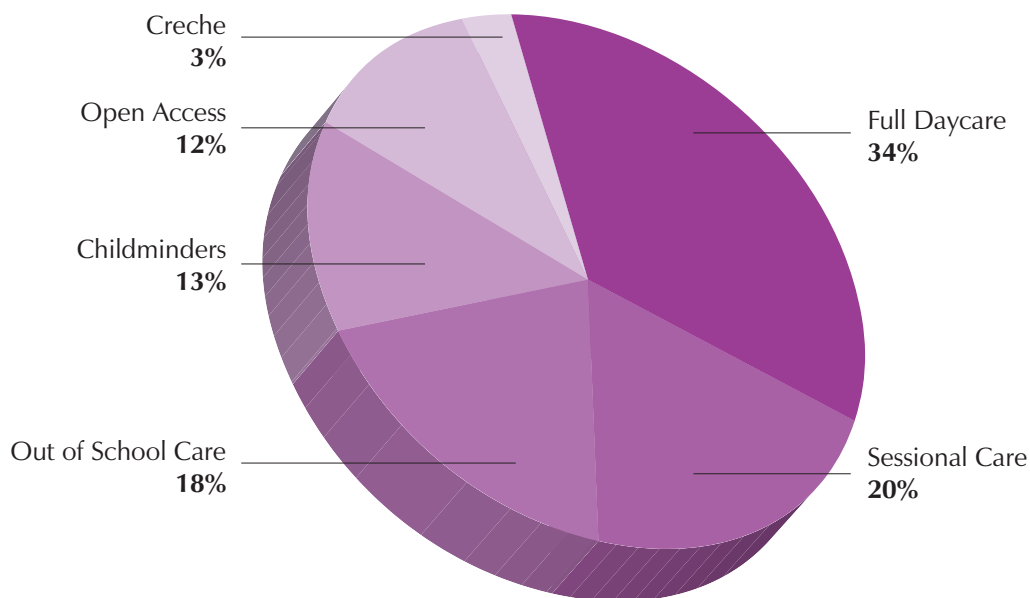
## The number of Practitioners

Research suggests that there were 18,986 people working in early years and childcare settings in Wales in 2005/2006. This represents 1.6% of all economically active adults.

**Figure 1: Childcare Workers by Category January 2006<sup>3</sup>**

Category of Care	Ratio of Places to Staff (both full and part-time)	Total Number of Workers in Sector
Childminders	n/a	2,538
Crèche	2.57	522
Full Daycare	2.74	6,393
Out of School Care	5.49	3,441
Sessional Care	4.78	3,767
Open Access	2.54	2,325
Average / Total	3.624	18,986

**Figure 2: Proportion of Childcare and Early Years Practitioners by Category**



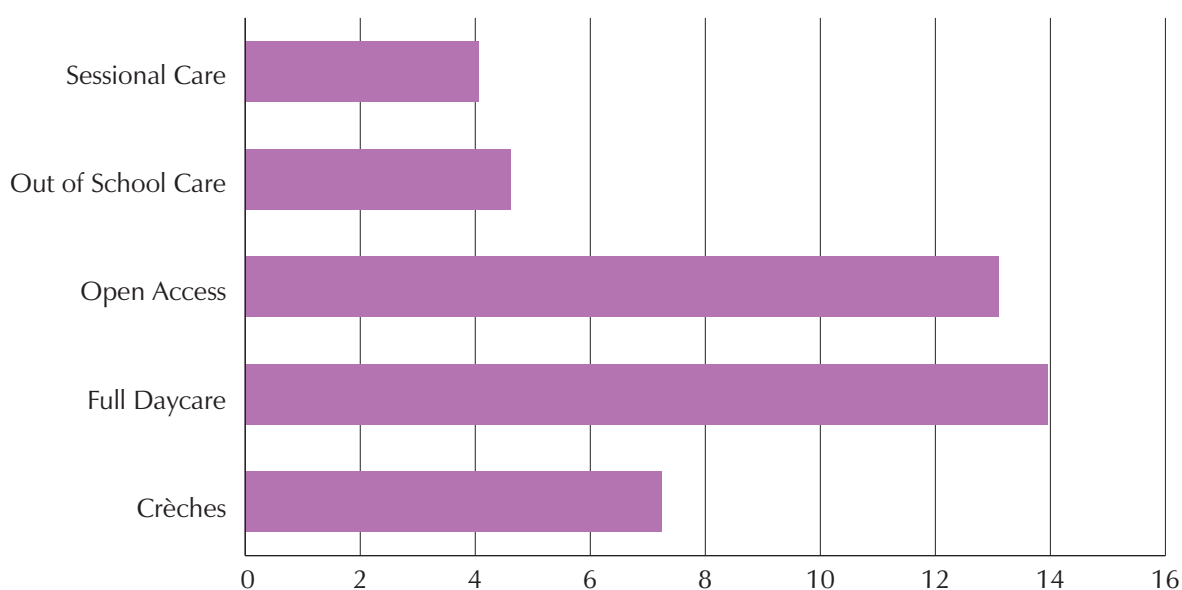
<sup>3</sup> Ratios relate to the total number of staff that worked for the employer, rather than the number who were working with children at any one time (many were part-time). In addition, data does not necessarily represent the total number of individuals engaged in the sector. There is anecdotal evidence that some individuals were working in more than one childcare setting. It is likely that a small element of double-counting exists within these figures. Ratios relate to the total number of staff that worked for the employer, rather than the number who were working with children at any one time (many were part-time). In addition, data does not necessarily represent the total number of individuals engaged in the sector. There is anecdotal evidence that some individuals were working in more than one childcare setting. It is likely that a small element of double-counting exists within these figures.

## Employers

Half of all early years and childcare employers were found to be private concerns, 41% were voluntary organisations with the remaining 9% being operated within the public sector. Day nurseries (96%) and out of school clubs (56%) had the largest proportion of private businesses.

The sector is typified by very small businesses. Only 2% of employers could be categorised as being medium enterprises (with more than 50 employees) while 63% were found to be micro-enterprises (10 or less employees).

**Figure 3: Average number of employees in enterprises by category**



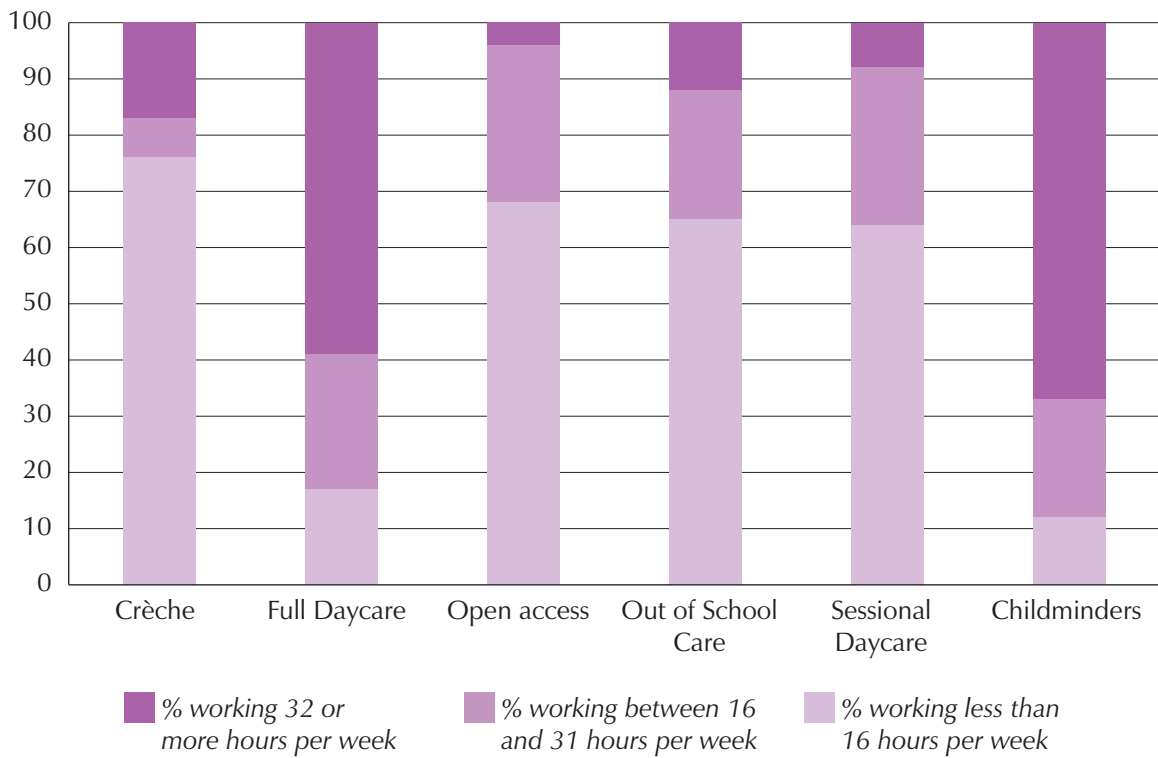
## Working Patterns

Whilst research found considerable differences between the types of care setting, less than half of all employed practitioners in the sector worked full-time (more than 30 hours per week), whilst a third worked for less than 16 hours per week. Of this proportion, 42% said that they had no other job.

It is likely that there are around 2,300 workers in the sector in Wales that are working too few hours to be eligible to claim Working Tax Credits and others are in receipt of in-work top-up benefits.

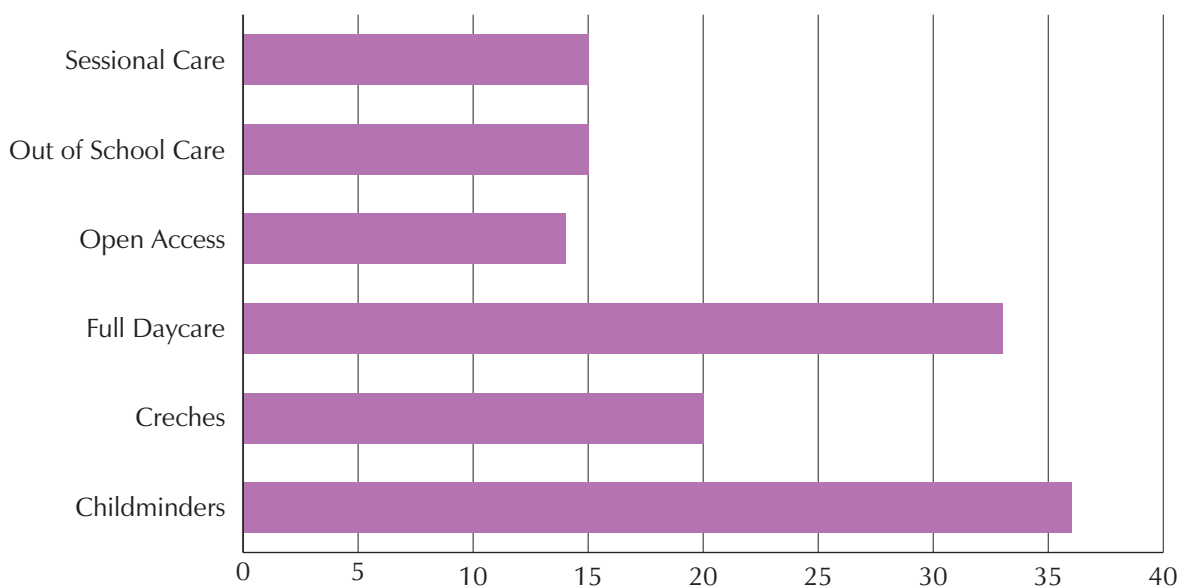
This may contribute to low status within the sector, although it was not clear from research whether practitioners worked short hours through choice or through contractual obligations.

**Figure 4: Weekly Working Hours of Employed Staff by Category of Care**



Self-employed childminders work the longest hours in the sector. Average working hours in daycare settings were 33 hours per week, although 22% of practitioners said that they regularly work for 40 or more hours per week.

**Figure 5: Average Working Hours by Category of Care**



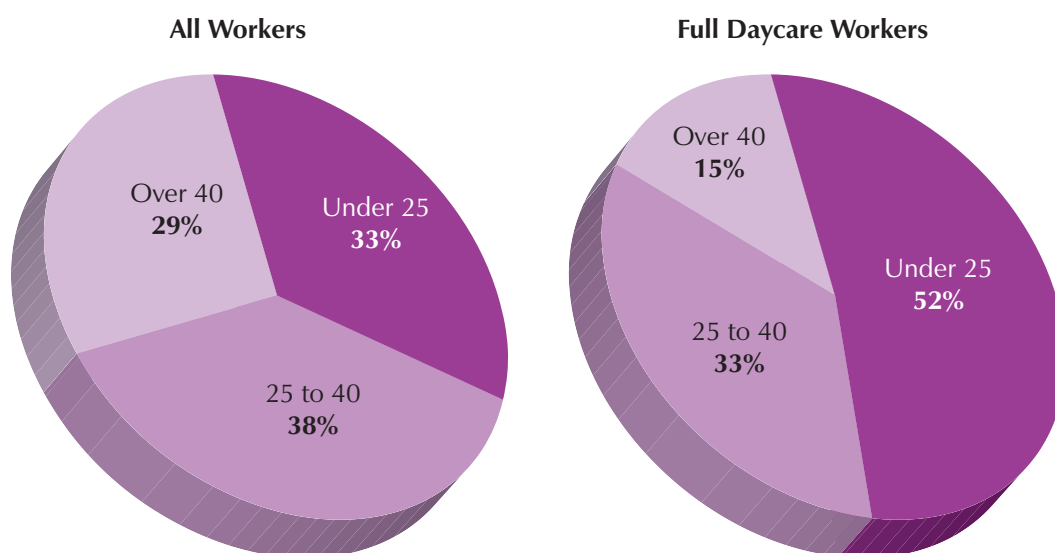
Average working week times in the other sectors – out of school clubs, crèches, open access schemes and sessional daycare – reflect the short, sessional nature of the care that is being provided. On the other hand 46% of practitioners working in these settings have at least one other job, some of which are in other early years or childcare settings.

### Workforce Ethnicity and Gender

The childcare workforce in Wales is predominantly white and female. Only 3.6% of the childcare workforce is from an ethnic minority, with 2% from non-white groups (2.1% in the general Welsh population). 97% of practitioners in this sector are female.

Whilst the age of the workforce is fairly evenly spread, overall, there are significant differences within the types of care settings (Figure 7). Most noticeable is the relative youthfulness of the full daycare sector. By contrast, the majority of childminders and crèche workers are over 40.

**Figure 6: Workforce Age Profile**



### Language

In surveys, practitioners were asked which languages they used in their work. Almost three-quarters of respondents said that they used only English in their work. 21% used English and Welsh and 8% used Welsh only.

There were significant differences in language use according to the type of setting. The high proportion of Welsh or bi-lingual speakers in sessional daycare settings reflects the presence of a significant amount of Welsh-medium provision. This is also shown in an analysis of language by region, where a higher proportion of practitioners speak Welsh in the traditionally Welsh-speaking areas.

Some slight differences in the ages of practitioners speaking Welsh, English or both in their work was found. The proportion of staff under 40 who use Welsh in their work is marginally higher (70%) than for practitioners who speak only English (65%).

**Figure 7: Languages used by Practitioners in their work**

Category of Care	Bilingual	English	Welsh
Childminders	20%	78%	3%
Crèches	9%	86%	5%
Full Daycare	18%	75%	7%
Open Access Play	23%	77%	0%
Out of School Childcare	32%	61%	8%
Sessional Daycare	33%	42%	24%
Average / Total	22.5%	70%	8%

**Figure 8: Working Language used by Practitioners by Region**

Region	Bilingual	English Only	Welsh Only
Mid Wales	22%	71%	5%
North East	19%	69%	12%
North West	58%	25%	17%
South East	11%	87%	2%
South West	12%	79%	8%
Vale & Valleys	11%	87%	2%
West	28%	44%	28%

## Pay Rates

From data provided by employers, a wide range of pay rates across all roles was found (*Figure 10*).

The most common (median average) hourly rate across all sectors and roles was £5.50 per hour. Yet given the proportion of practitioners working without qualifications, the mean average rate of pay in the sector is likely to have been lower than this.

12% of employers were found to have a basic pay rate for unqualified staff that is below the adult minimum wage of £5.05. Such low pay rates were found in all types of setting and reflect both the general economic hardship within the sector and the proportion of younger (under 21) workers in particular settings.

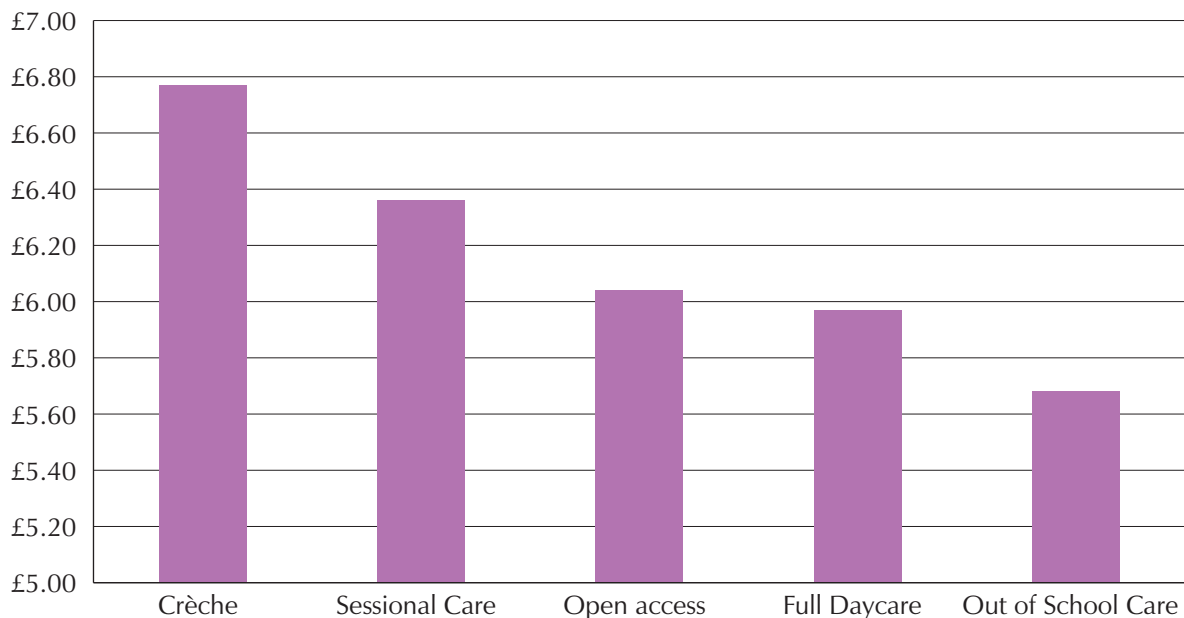
According to research by the Low Pay Commission<sup>4</sup> for Britain as a whole, in April 2004, 3 per cent of employees in childcare occupations were paid around the adult rate of the National Minimum Wage. Four per cent of employees were paid less than the adult rate in April 2004. In Wales, this proportion was found to be higher on both counts.

<sup>4</sup> National Minimum Wage, Low Pay Commission Report 2005

**Figure 9: Pay rates by Job Role and Sector**

Category of Care	Unqualified Staff Pay Rate (Hourly)	Qualified staff Pay Rate (Hourly)	Supervisor Pay Rate (Hourly)
Creche	£6.32	£6.91	£7.10
Full Daycare	£5.01	£5.86	£7.04
Open Access	£5.54	£5.64	£6.93
Sessional Care	£5.36	£6.86	£6.87
Out of School Care	£4.95	£5.45	£6.64
Average / Total	£5.44	£6.14	£6.92

In general, practitioners in out of school settings were paid less than those in other sectors, followed by those working in full-daycare. Crèche workers receive the highest pay (Figure 11).

**Figure 10: Average pay rates for all Practitioners by Category**

Some small differences were found between those practitioners working for voluntary sector organisations and those working in the private sector. Practitioners working for voluntary sector organisations were paid, on average, 12% more than those in equivalent posts in the private sector. In out of school settings though, practitioners in the private sector were paid 4% more than those working for not-for-profit businesses.

No significant differences in pay rates were found between Welsh and English speaking staff.

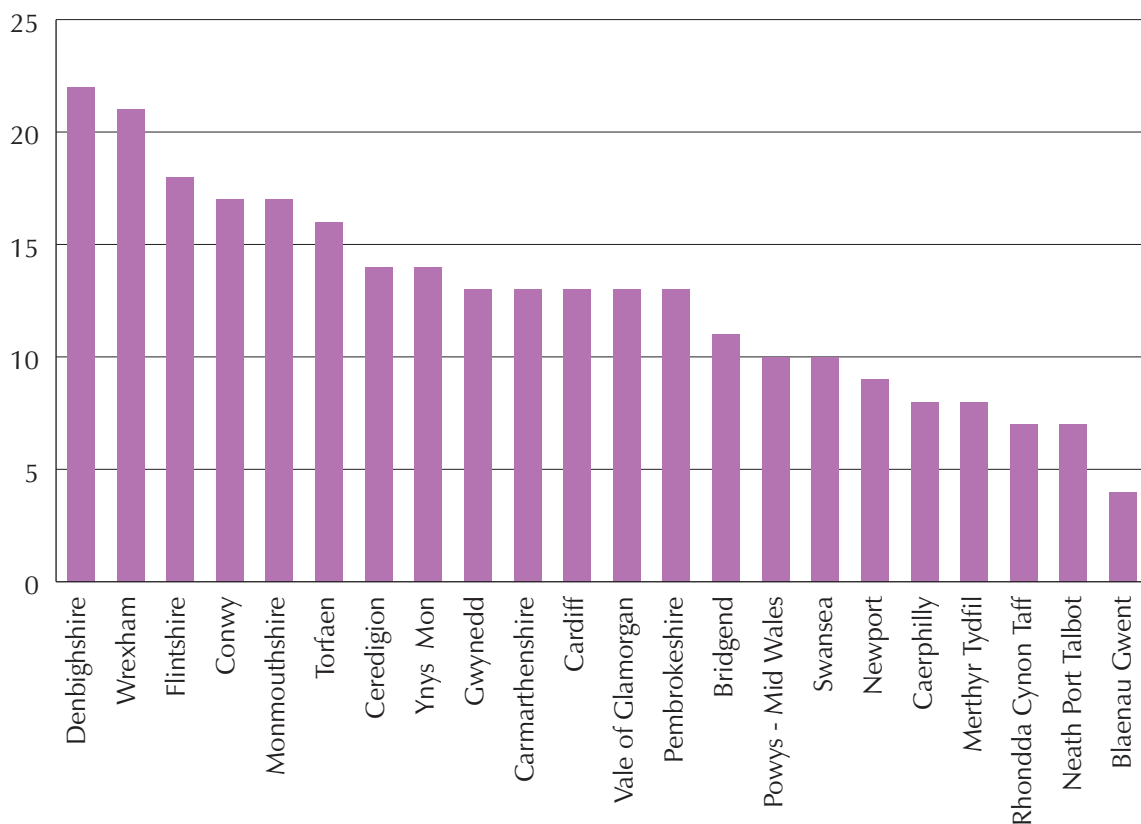
Pay rates across Wales show some identifiable trends with average pay rates in South East Wales being highest and rates in North East Wales being the lowest. Nonetheless, the range in pay rates across Wales was quite small.

Establishing accurate pay rates for childminders is not possible as being self-employed, differing occupancy rates and overheads mean that an analysis of fee rates will not relate to profits (a recent survey<sup>5</sup> has shown that a full-time place with a childminder costs on average £124 per week in Wales).

### Location

The stock of registered childcare places (and therefore childcare workers) is unevenly distributed across Wales, with considerably higher levels of childcare (relative to the population) in North Wales.

**Figure 11: Number of registered childcare places per 100 resident children aged 0 to 4 years of age June 2005. Ranked by Local Authority.**



This data has implications for the planning and delivery of training across Wales, especially with initiatives such as Genesis Wales and Flying Start increasing the amount of registered care in areas where current levels are low. Areas with high levels of existing care are likely to require more professional development and upper-level qualification training. Areas that currently have little childcare may require additional investment in entry-level training.

<sup>5</sup> Daycare Trust Annual Childcare Cost Survey 2006

## 5. Job Roles and Qualifications

### Job Roles

The early years and childcare sector can be split according to the age of children involved. In most cases, children under 5 years of age are catered for within Full Daycare, Sessional Daycare and Crèches.

Children aged 5 and over are provided with services from Out of School Clubs and Open Access Playschemes. In general, it can be said that out of school clubs are focused on 'care' whilst open access schemes are primarily providing 'play'. This is more often than not reflected in job titles.

To establish the key occupations within the early years and childcare field, employers were surveyed and asked to list the job roles of employees and identify the most desirable qualification for each post. In addition, practitioners were asked for their job titles and current qualifications.

An analysis of responses from employers is set out in *Appendix 1* and shows not only the range of job titles found within the sector, but highlights some of the difficulties in establishing clear definitions for roles.

It is clear that job titles can be interchangeable across sector boundaries with some practitioners working with under 5's being called 'play' workers, whilst some working in out of school clubs (often attached to Day Nurseries) were called 'care' workers or Nursery Nurses. Putting aside arguments about the appropriateness of such categorisation, the qualifications that employers are looking for from prospective employees complicate the situation further.

Most full-daycare employers said that they looked for Level 2 or 3 qualifications in Early Years and Childcare. Yet, many employers ask for specific qualifications, such as the *BTEC National Diploma in Early Years*. Many employers stated a preference for such qualifications (which involve 2 years of full-time study and a more academic approach rather than work-based training) that are seen as superior to NVQ Level 3 qualifications. There may be some historical reference in that the BTEC qualification is seen as the natural successor and equivalent to the NNEB (Nursery Nurse Examination Board) Diploma in Nursery Nursing that is still seen in the sector as the 'gold standard' qualification.

Some employers within the sector clearly use the term 'NNEB' as the desired qualification level because they are unaware of the qualifications that currently exist. This approach is not confined to the full daycare sector, but is also found in sessional care and even in desired qualifications for posts in out of school care.

Employers said that they find the variety of qualification titles in the sector confusing and this made it difficult for them to assess the level attained by prospective employees, and to identify appropriate training for existing staff.

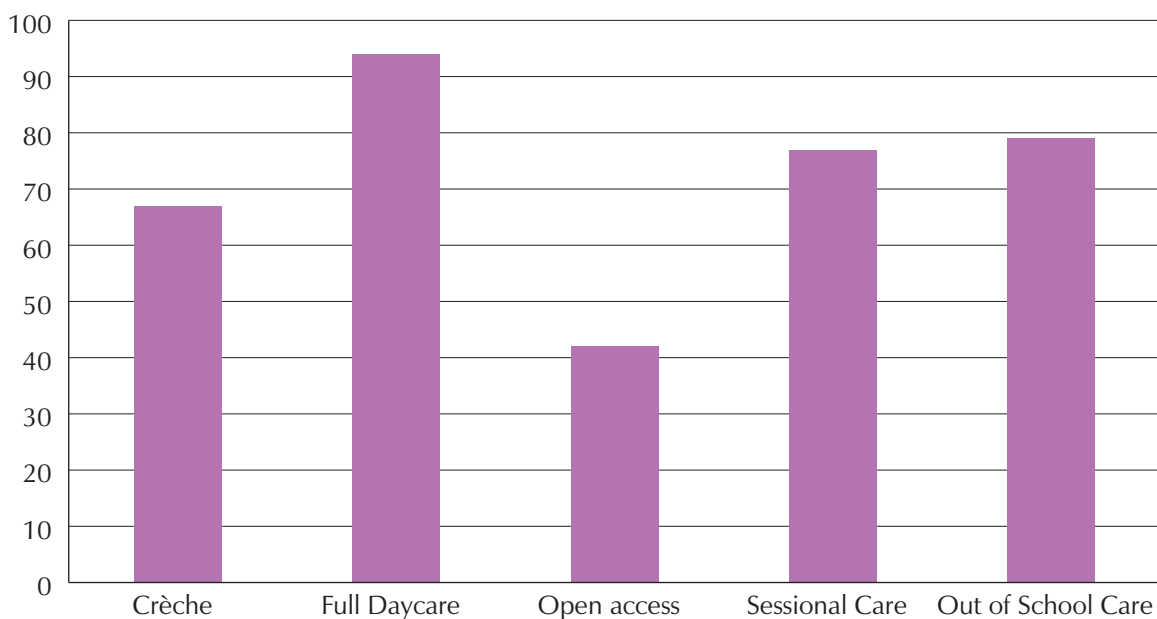
## Qualifications held by Practitioners

The National Minimum Standards for Daycare require that from April 2008 all registered childcare settings will be managed day to day by a person with a relevant Level 3 qualification, and in full daycare, 80% of staff will have at least a Level 2 qualification.

Data from the survey of practitioners suggests that many settings are already meeting these standards. *Figure 12* shows the percentage of managers, leaders and deputies, who already hold a Level 3 qualification or above.

Overall, 72% of senior staff hold a Level 3 qualification or above. Nevertheless, that is not to say that a Level 3 practitioner leads 72% of settings. Analysis of survey results show that in a significant number of settings there were no practitioners holding a Level 3 qualification. The problem is most acute in the out of school sector where it is estimated that up to half of all clubs were not being led by a Level 3 practitioner. In Sessional Daycare the proportion may be a third.

**Figure 12: Percentage of Leaders, Supervisors and Deputies in Childcare and Early years settings holding a Level 3 (or above) qualification<sup>6</sup>.**



Whilst the number of childminders with recognised qualifications is low, 73% have at least attended an introductory training such as the *Introducing Childminding Practice* module<sup>7</sup> as required by the National Minimum Standards.

<sup>6</sup> It should be noted that there are settings that employed more than one leader or deputy with a Level 3 qualification. The proportion of settings where at least one member of staff had a L3 qualification is therefore considerably lower – especially in the out of school and pre-school playgroup sector.

<sup>7</sup> The ICP is the first of four units in the Level 3 Diploma in Home Based Childcare.

**Figure 13: Qualifications held by Category of Care and Level (all staff)**

Category of Care	Number of Practitioners Surveyed	Level 2	Level 3	Level 4
Childminders	166	18%	20%	3%
Crèche	40	14%	59%	9%
Full Daycare	701	20%	60%	3%
Open Access	63	8%	30%	3%
Sessional Care	440	13%	49%	5%
Out of School Care	292	21%	55%	0%
Average / Total	1702	16%	45.5%	4%

Of those staff who held qualifications, 66% gained their most recent qualification within the past 5 years and 84% within the past 10 years. The oldest qualification was found to be an NNEB gained in 1971.

A third of practitioners in the sector were in training towards a recognised qualification related to their work. Nearly half of these were working towards a Level 3 qualification.

Applying the figures for those practitioners in training against the whole workforce, it can be estimated that some 5,700 practitioners are currently working towards a relevant qualification.

## 6. Recruitment and Retention

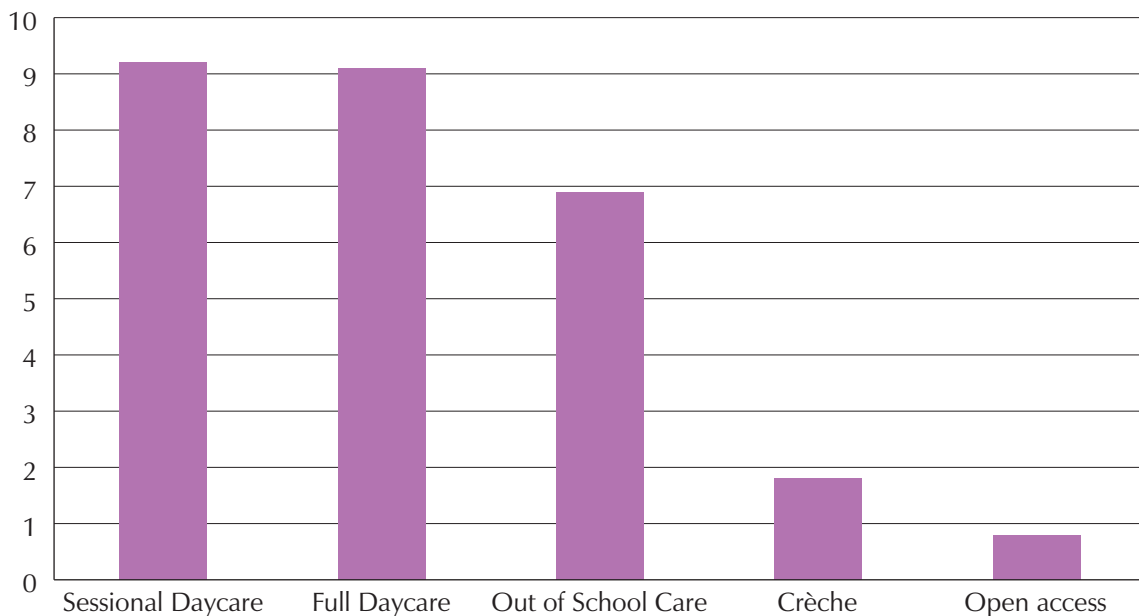
Anecdotally, recruitment and retention of staff is often highlighted as an area of concern in the childcare sector, but to date there has been little evidence to quantify the extent of the problem.

### Workforce Growth

Consultation with employers alongside CSIW statistics shows that the early years and childcare sector is expanding.

The stock of registered childcare places in Wales increased by 3% between May 2004 and June 2005. Evidence collected from employers suggests that the workforce grew by 6% over a similar period. Within the sector, recruitment into sessional and full daycare has been greatest with employers recruiting 9% more practitioners than leavers.

**Figure 14: Number of additional practitioners recruited by category during 2005**



The number of childminders in Wales also grew, evidenced by an increase (7.5%) in the number of childminders registered with CSIW and the recruitment of childminding assistants.

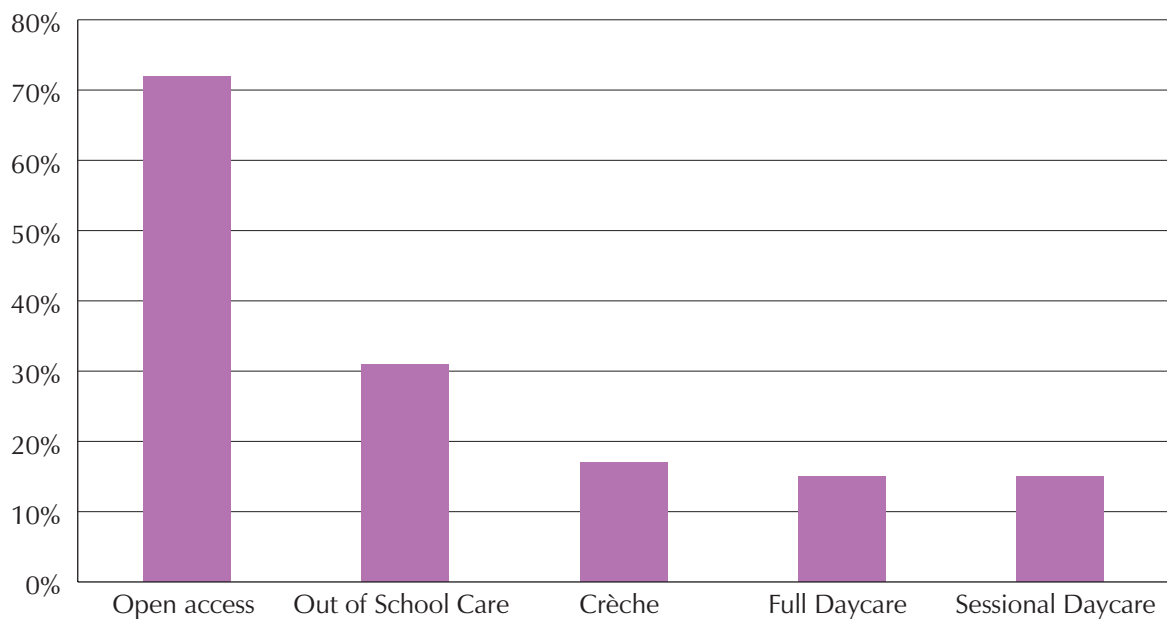
### Turnover

75% of early years and childcare employers recruited staff in 2005 with sessional care providers being least likely to have taken on new staff. 63% of employers lost staff over the same period.

**Figure 15: Proportion of employers recruiting and losing new staff in 2005**

Category of Care	% of employers recruiting new staff	% of employers losing staff
Creches	50%	38%
Full Daycare	87%	75%
Open access	100%	100%
Out of School Care	75%	67%
Sessional Daycare	63%	38%
Average / Total	75%	64%

Whilst there has been growth in the number of practitioners across all sectors of childcare and early years in Wales, research found a significantly high level of staff turnover.

**Figure 16: Turnover of Staff in 2005 by category**


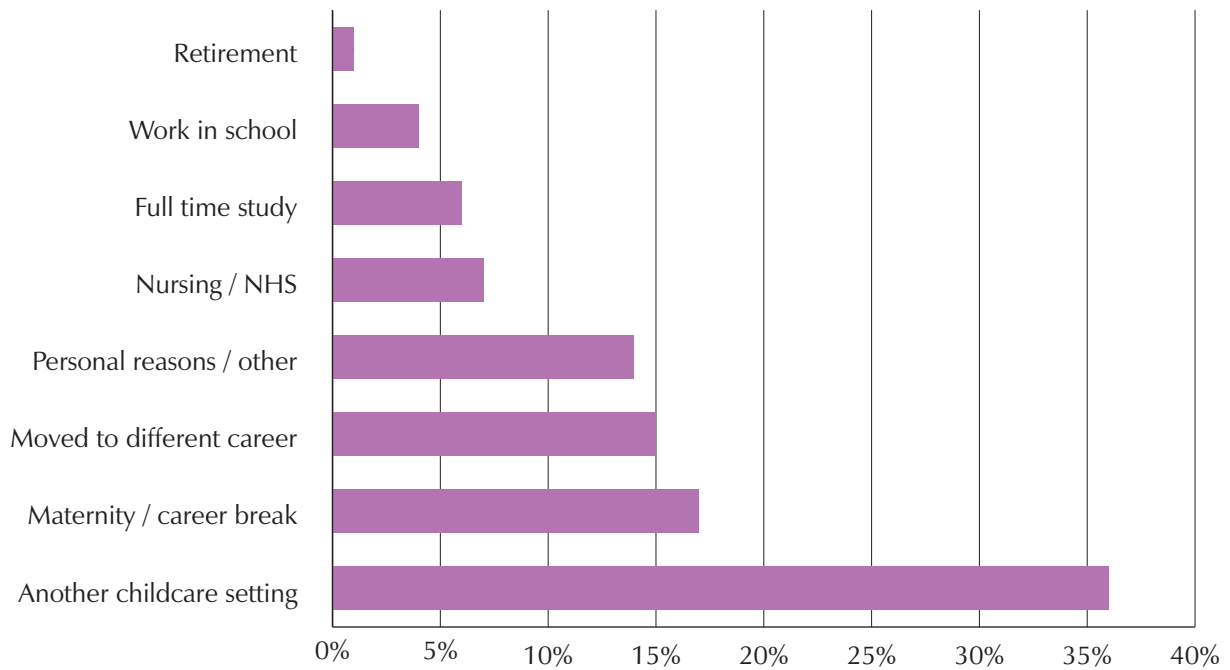
Excluding open access provision (where the majority of staff are employed only for short periods during school holidays), turnover averages 19%. This is consistent with data published by DfES regarding the early years and childcare workforce in England<sup>8</sup>.

No significant difference in turnover between Welsh or Bilingual medium settings and English medium employers was found.

Employers were asked in surveys to identify the destination of staff leavers. Whilst a proportion were not aware (none of the employers surveyed used exit interviews as part of their management process), 161 employers were able to identify the destination of leavers.

<sup>8</sup> DfES, Childcare Workforce Survey 2004

**Figure 17: Destination of employees leaving childcare, early years and play settings.**

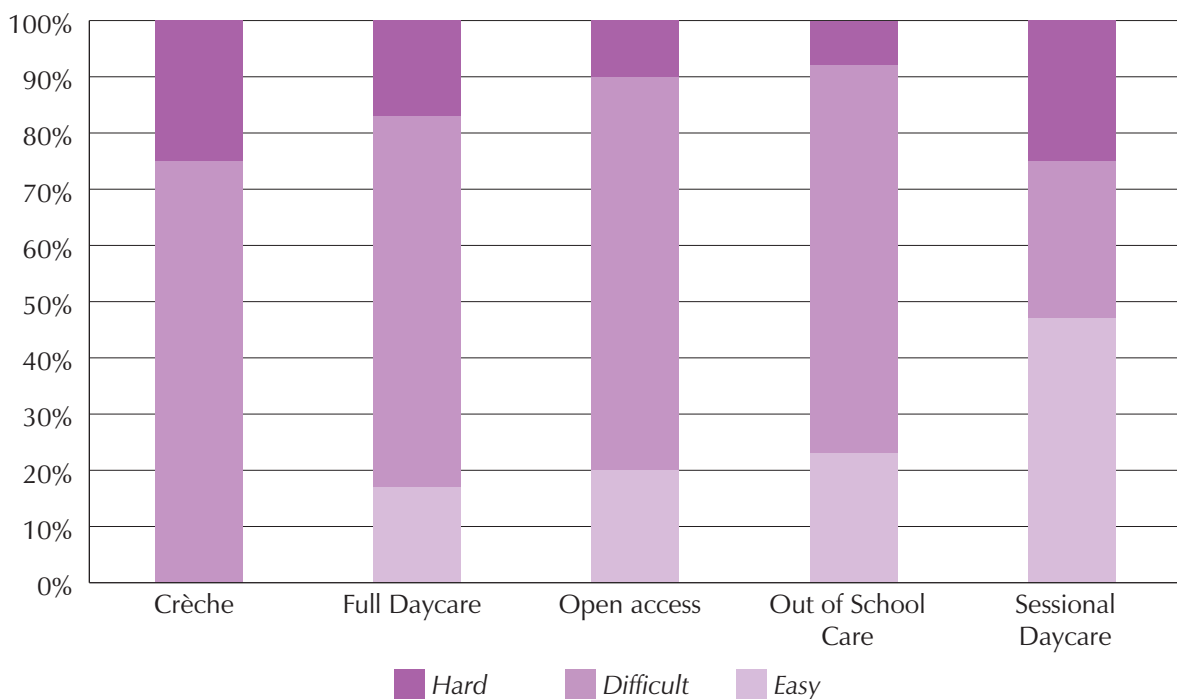


The data shows clearly that over a third of those leaving an employer remain within the sector. Taking this into account, the number of staff leaving the sector in Wales each year is likely to be around 2,531.

**Recruitment**

Employers in the sector were asked whether or not they experienced difficulty in recruiting staff.

**Figure 18: Recruitment Difficulty**



The majority of employers (69%) surveyed said that they found recruiting staff 'Difficult'. 17% said that they found recruitment 'Hard'. A quarter said that recruiting staff was 'Easy'.

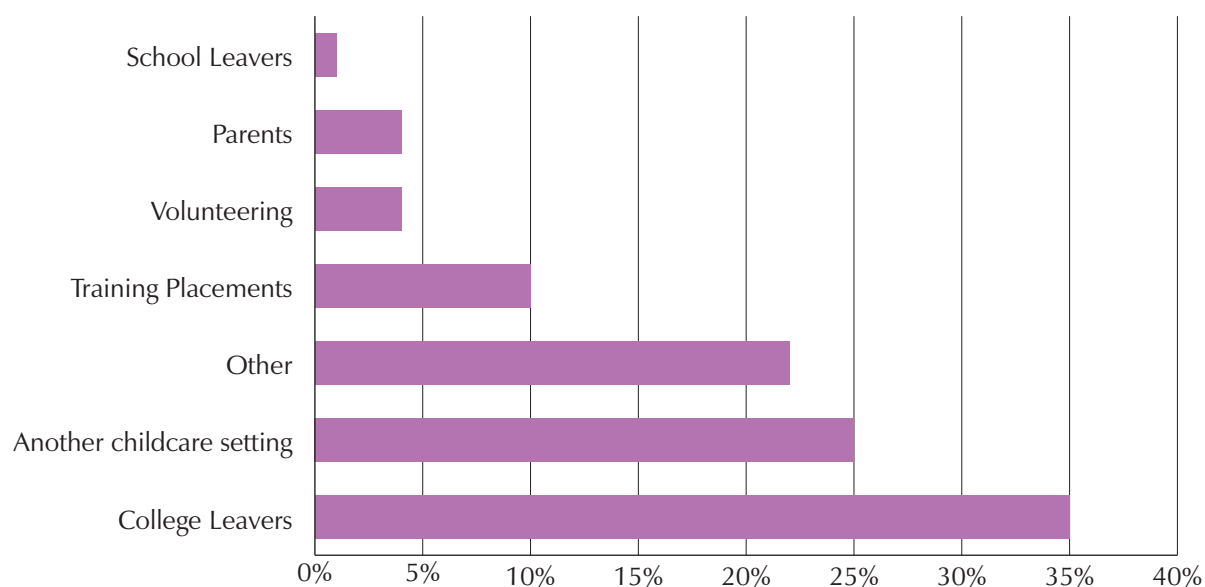
Within Welsh-Medium settings, whilst a similar proportion of employers said that they found recruitment 'Easy', a slightly higher proportion (28%) told us that recruitment was 'Hard'. Mudiad Ysgolion Meithrin (MYM), the all-Wales representative body for this sector suggest considerable difficulties faced by their members in recruiting and retaining Welsh-speaking practitioners.

Employers cited a range of problems in recruiting staff, but most commonly:

- Getting enough applicants
- Finding staff with matching skills and qualifications
- A lack of bi-lingual and Welsh-speaking applicants
- Transport
- A lack of experience among applicants
- Low wages deter staff
- Hours of work
- Low quality of training causing a lack of quality applicants

Taking into account the turnover of staff alongside growth, employers across the sector need to recruit some 5,700 practitioners each year.

**Figure 19: Sources of new employees**



34% of new practitioners moving into the sector come directly from colleges. This is equal to 1,938 graduating students annually. 25% of new employees are recruited from other settings (this is consistent with information regarding the number of leavers who stay within the sector).

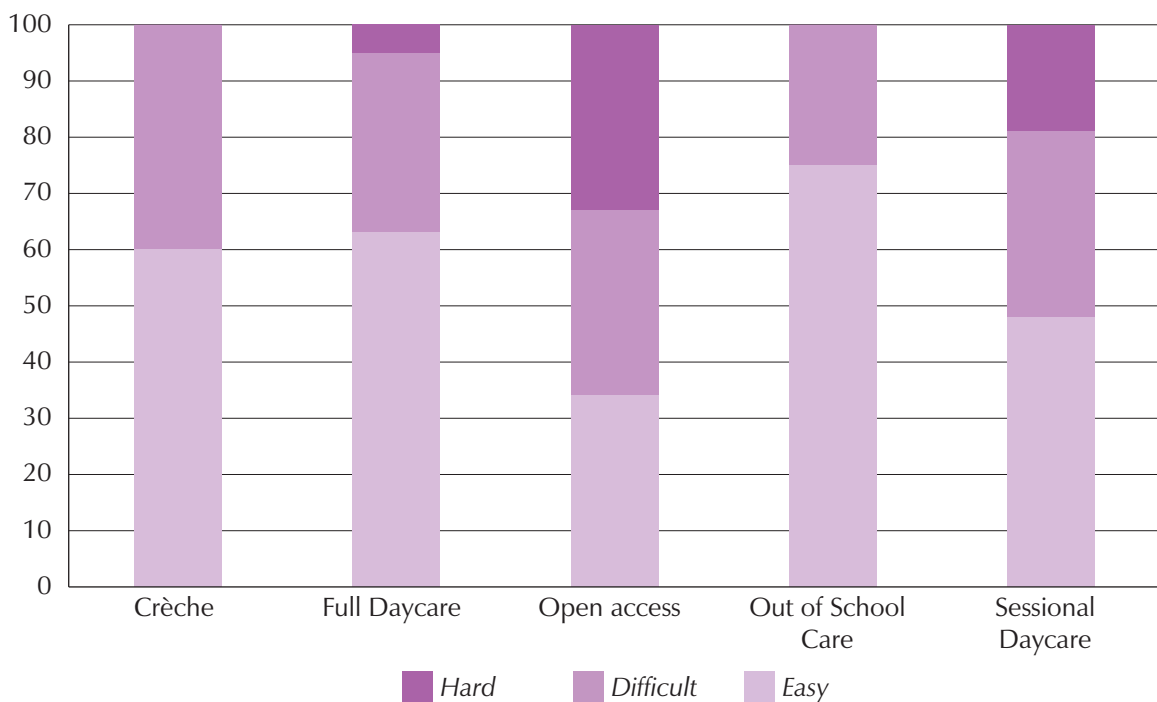
## 7. Workforce Development and Training

Training for this sector is required at a number of levels. To comply with legal and registration requirements, workers need regularly updated training in first aid, child protection, health & safety etc. A proportion of practitioners are required to hold an appropriate professional qualification depending on their role and the type of setting, while for many practitioners, although there is no regulatory requirement, they will seek to undertake training towards a recognised qualification in the workplace.

### Availability of Training

Over half of employers surveyed said that they found it easy to access the training they needed for their staff. A third of employers surveyed said that it was difficult to access training whilst a small number (11%) said that they found it hard. In general, employers in rural and North Wales, as well as those working through the medium of Welsh found accessing training more problematic.

**Figure 20: Level of difficulty experienced by employers in accessing appropriate training for their staff**



The survey of employers found that the availability and cost of statutory training (such as First Aid and Child Protection) was variable depending on the amount of investment made by local authorities across Wales.

Many employers cited cost and availability of training as an issue. Many of the problems related to the timing of training courses; the cost of back-filling staff; the distance that practitioners have to travel; and the availability of Welsh-language learning opportunities.

## Barriers to Training

Consultation with childcare practitioners highlighted many of the same issues around the availability of training. For childminders (who on average, work the longest hours), access to training both in terms of location and timing seems to be the main barrier. Across all practitioners an element of apathy was found regarding training and career development. Lots of practitioners – including many childminders – said that they were simply too tired after a days work to think about training in their own time. A significant number of practitioners said that they have all the qualifications that they needed for their current job and therefore couldn't see the point in further training. This highlights issues around the lack of career pathways within the sector, limited opportunities for development and lack of financial reward.

Given the size of the majority of childcare businesses and the low-fee / low-pay economy, it was not surprising to discover that in-house work-based learning is practically unheard of in the sector. Most employers had to rely on external providers to deliver work-based learning and assessment, which resulted in a lack of choice and flexibility in the training that was available to them.

A number of messages were clearly stated by employers regarding the availability of training.

- 44% of employers said that finding the right training was difficult for them.
- Rural employers face problems both in recruiting suitably qualified staff and in accessing training for their staff once recruited.
- The availability of progressive qualification training is limited by both supply and demand. With limited funding available from employers to pay for continuing development training and little external funding for training at Level 3 and above, staff within the sector rarely progress and often move out of the sector without fulfilling their professional development potential.
- Availability of Welsh-language training is limited

## Quality of Training

Employers have real concerns about the quality of training, particularly training provided by some work-based learning providers. A number of employers said that they actively avoid recruiting staff that have received training from particular providers, or through specific routes.

There are clearly capacity issues around the number of suitably qualified and experienced trainers and assessors in this sector. This is particularly acute when considering the needs of Welsh-speaking students.

## Funding for Training

The main problem faced by employers is that of funding for staff qualification training. The sector has expanded significantly in recent years, but employment and development practises are still very poor. This is particularly evident in the voluntary sector (35% of all employers).

## Employer Plans & Budgets

Of the 403 employers consulted, 57% said that they had a training plan in place, although it is likely that some plans are not followed through given that less than half of these employers had an allocated budget for training. The size of training budgets varied greatly. The largest amount that any

single provider spent on training was £10,000 per year. The average amount spent on training by employers from all those surveyed was £55.24 per practitioner per year.

**Figure 21: Employers Training Plans and Budgets**

Category of Care	Providers with Training Plans	Providers with Training Budgets	Average Training Budget per Head (for those with budgets)
Creches	75%	50%	£72.00
Full Daycare	65%	42%	£62.89
Open Access	34%	22%	£28.90
Out of School Care	58%	33%	£50.00
Sessional Care	50%	47%	£62.39
Average / Total	56%	39%	£55.24

In the absence of capacity to fund training from within the sector, childcare and early years employers rely heavily on public funding. This comes from a variety of sources including; Local Authority Children & Young People's Framework Partnerships; WDA; and ELWa. This situation is likely to continue for the foreseeable future whilst the sector remains economically depressed (low-fee / low-pay cycle).

On a small scale, the all-Wales childcare organisations (Mudiad Ysgolion Meithrin, Wales PPA, Clybiau Plant Cymru Kids Clubs and National Childminding Association) have been very effective in meeting the needs of their members through offering locally delivered, quality qualification training.

NCMA delivered training has ensured that 40% of childminders are now qualified to at least Level 2, with a further 23% currently working towards a Level 3 qualification. For the past four years funding for this has come from Welsh Development Agency's *New Business Starts Initiative* with NCMA Wales receiving funding to support over 300 childminder registrations annually, which includes delivering the *Introducing to Childminding Practice* course required for registration (and therefore business start-up) and supporting the sustainability of childminders as small businesses through training towards the *Level 3 Diploma in Homebased Childcare*.

MYM has a unique national training programme funded through Iaith Pawb. Cam wrth Gam recruits students and provides training towards either a Level 2 or 3 VRQ in Early Years Care and Education (Welsh medium).

Clybiau Plant Cymru Kids' Clubs provides training for those working in out of school care including under-pinning knowledge for NVQ levels 1, 2 and 3 in the 15 Objective One counties in Wales and delivers a range of training in all but 2 local authority areas in Wales.

The National Day Nursery Association is increasing its profile in Wales and is the only childcare organisation working with workbased-learning providers to deliver (DELLS) funded training to its members.

## Training Providers

Due to post-16 funding arrangements it is difficult to gain a comprehensive picture of training providers delivering childcare and early years qualification training in Wales. Whilst the 25 Further Education colleges and institutions all deliver childcare courses (to a greater or lesser extent), there are also a number of independent providers delivering work-based training to the sector across Wales. Surveys found that a significant number of practitioners in East Wales undertaking training at establishments in England.

Across Wales, colleges are delivering at least Level 2 and Level 3 qualification training to the sector, and increasingly, Level 4 courses. Most FE colleges offer a choice of work-based (NVQ) and full-time college study courses (such as the BTEC National Diploma) to students wishing to enter the sector. Yet employers often said that the training is not always meeting the needs of the sector in delivering the quality of prospective employee that is needed to provide high quality services and raise the status of practice. Employers often complain about the standard of teaching and assessment on some VRQ training courses, with the quality of placement experiences also an issue. Given the increased pressures on staff to deliver high quality integrated care and learning, daycare employers in particular said that the calibre of staff was low and blamed lax admissions standards by training providers.

Practitioners said that once in employment, they often find it difficult to access qualification training that is accessible, affordable and of high quality. Again, practitioners based in rural areas and working through the medium of Welsh found accessing both VRQ and other professional development training most problematic.

From survey responses, it was found that on average, each FE college in Wales currently has 154 students participating in Childcare, Early Years and Playwork training. 60% of students attending are currently employed in the sector and are studying part-time, with the remainder studying full-time. The average drop-out rate on childcare courses was found to be 36% on FE courses, 25% in Higher Education, 27% with Independent Training Providers and 42% with All-Wales childcare organisations.

In relation to the number of college leavers that employers said that they take on each year, estimates of around 3,500 students completing college-based childcare courses would seem to be adequate in meeting their needs for new practitioners. Nevertheless, as has already been discussed, employers have concerns regarding the quality of students emerging from some college-based courses.

Assessing the scope of the independent training sector is more difficult. There are around 120 providers of work-based training in Wales who provide mainly NVQ training through Modern Apprenticeships or National Traineeship schemes (other than the FE colleges as previously mentioned). Research identified 26 providers delivering funded work-based training to practitioners in the sector. Because the number of trainees on work-based training is fluid, it has not been possible to make any kind of accurate assessment of the volume of training that is being provided. Feedback from practitioners suggests that across Wales as many as 3,400 practitioners (18% of the workforce) may be currently undertaking work-based training. These figures include 330 pre-school practitioners (10% of practitioners in this sector) who are receiving training from MYM and 200 childminders (8%) receiving training from NCMA.

Higher Education Institutions are increasingly delivering and accrediting higher-level qualifications at Level 4 and above including the BA and BSc in Early Childhood Studies and MA in Early Education. Nonetheless, access to higher-level courses is currently restricted across Wales.

Many local authorities in Wales offer a considerable amount of professional development training to the sector, offering required courses such as First Aid, Child Protection and Health and Safety as well as issue and practice-based training. But while some local authorities offer a wide range of courses, others provide little. It was found that in some cases information about courses was patchy, courses were heavily oversubscribed and training did not always take account of the needs of the sector regarding work patterns.

## 8. Conclusions and Recommendations

### The Workforce

There are 18,976 people working in the registered childcare sector in Wales. This represents 1.66% of all economically active adults<sup>9</sup>. In addition, there are likely to be a further 4,500 people in training to work in the sector.

There are a total of 2,400 businesses in the sector (representing 2.6% of all businesses in Wales<sup>10</sup>) employing staff alongside over 2,000 self-employed childminders.

Less than half of the workers in this sector work full-time (for more than 30 hours per week). The average working week for a childcare practitioner is 26 hours.

The workforce is mainly white and over 99% female. The average practitioner is aged between 25 to 40 years of age but in day nurseries, most workers are aged less than 25 years of age.

Just over a quarter of workers use Welsh in their work, although the proportions in West and North West Wales are considerably higher.

People working in this sector are recognised<sup>11</sup> as low paid and our research suggests that on average, workers are paid £5.50 per hour – less than half the average pay rate for women working full-time across the UK and just 10% above the rate of the minimum wage.

Given the size of the workforce and its status as one of the lowest paid sectors within Wales, the early years and childcare workforce is not given the recognition or funding it deserves as a cornerstone of the Welsh economy.

- *To monitor changes and progress within this sector, either an annual or at least bi-annual workforce survey needs to be established; or existing workforce surveys in Wales need to incorporate the gathering of detailed data regarding the sector.*

### Existing Qualifications and Posts

Establishing clear definitions of job roles in the sector is complicated by its fragmented nature (with a number of distinct types of service eg. sessional care and full daycare). Whilst it is possible to broadly map job roles against the National Qualifications Framework each category of service provision within the sector sees itself as having differing needs regarding qualifications and training. This results in a complex array of qualifications and courses that are confusing for employers and practitioners alike. It may also be contributing to recruitment difficulties.

Overall, 16% of workers in this sector are qualified to Level 2; 45% to Level 3; and 4% to Level 4. This leaves 35% of the workforce unqualified.

Based on current information, should the Welsh Assembly Government proceed with a register of workers in this field (with registration requiring at least Level 2), approximately 12,300 practitioners would be eligible.

A third of practitioners in the sector are currently undertaking vocational training with half of these working towards a Level 3 qualification.

<sup>9</sup> Based on 1,145,250 economically active adults in Wales (ONS Census 2001)

<sup>10</sup> ONS Census 2001 Counts of Local Units for CAS Wards by Broad Industry Group

<sup>11</sup> National Minimum Wage, Low Pay Commission Report 2005

- *Further work is needed involving CSIW to establish a definitive picture of the current qualifications of leaders / managers in each registered setting to ensure that the sector can meet the requirements of regulation in 2008.*
- *Sector Skills Councils (CCW and Skills Active) need to work with employers and training providers to present a map of job roles and training within this sector and their relationship to the National Qualifications Framework. Employers and practitioners alike need clear information through publications and good practice guidance.*

## **Recruitment and Retention**

The workforce in the sector grew by 6% during 2005 with the most growth taking place in full-daycare settings.

Over the same period employers lost on average 20% of their employees, although a third of these remain within the sector.

Taking into account these factors it can be estimated that 5,700 new practitioners need to be recruited into the sector each year to cover growth and turnover.

Much of this demand is currently being met by the Further Education sector but there seems to be a mismatch between the needs of employers and the qualifications and courses being offered.

Most employers are finding it difficult to recruit staff and more difficult to recruit the staff that they really want. There is a mismatch between the levels of qualifications that employers say are desirable for job roles and the qualifications of staff currently in those posts. Whilst employers have concerns regarding the quality of applicants, many had poor recruitment and retention practices.

Low pay and poor conditions of service found across the sector are unlikely to attract high quality applicants.

There is concern across the sector regarding the introduction of the Foundation Phase for 3 to 7 year olds across Wales, scheduled for 2008. It is widely expected that increased classroom ratios will require an additional 3,500 teaching support staff to be recruited. Higher salaries and better conditions of employment will make these positions very attractive to existing, experienced and qualified childcare staff. In addition, the impact of new initiatives such as Genesis Wales<sup>12</sup> and Flying Start needs to be considered, and the impact on the existing workforce quantified.

- *At a local level employers need to be drawn together and engaged in identifying local training needs and communicating these requirements to local training providers. The mechanisms to achieve this could be a series of regional partnerships (involving employers, training providers and local authorities) across Wales through which a proportion of funding should be channelled and potentially Flying Start training funds could be pooled to greater effect.*
- *An assessment of the scope and availability of appropriate management training for the sector would assist both local and all-Wales strategies to be developed to increase the leadership potential within the early years field*

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<sup>12</sup> The Welsh Assembly Government has set a target to develop 8,500 new childcare places under the Genesis Wales initiative. This will require approximately 2,300 new childcare workers to be recruited by 2009.

- *Disseminating good practice in recruitment and retention through toolkits, booklets, training and support would have a constructive effect on the sector and impact positively on service quality.*
- *The introduction of the Foundation Phase in 2008 along with Genesis Wales and Flying Start is likely to have a negative effect on the existing childcare and early years workforce. An analysis is needed of the likely requirements for teaching assistants in schools, their qualification levels and roles, and thereby an assessment of the recruitment and training issues that will need to be put in place beforehand either to directly meet the additional recruitment needs of schools, or to backfill the childcare sector.*

## Workforce Development and Training

Whilst there is a considerable amount of both qualification and professional development training available to the sector, both employers and practitioners do not always find it accessible, affordable and of high quality. It was found that in many cases training was neither needs nor demand led but developed on an ad-hoc basis with little formal engagement between training providers on one hand and employers and practitioners on the other.

Access to training across Wales is not consistent. Access in rural areas to work-based vocational training is a particular issue, as is access to higher-level qualification training. There are also inconsistencies dependant on targeted funding such as Objective 1, which is funding training in many, but not all areas of Wales.

Employers have expressed doubts as to the quality of training provided by some organisations. Of specific concern is the quality of some work-based vocational qualification training.

The economics of the sector means that employers have very limited resources to fund training. Only 57% of employers allocate funding for staff training and of these, the average spend per employee is £55 per head. This results in reliance on publicly funded training which is often limited in its scope and availability. Following the funding for training often means that practitioners and potential practitioners are pushed into qualification routes that may not be suited to their current or future needs.

- *Regulations that ensure a minimum level of quality of care require investment in the workforce that the sector is unable to afford. The Welsh Assembly Government needs to recognise the sectors' reliance on the public purse and secure funding that will meet the training needs of employers and practitioners.*
- *Existing allocation of Welsh Assembly Government funding to provide training to the sector needs reviewing and a more flexible approach taken that recognises; local needs; the specific delivery requirements of the sector; and enables a wider age-range to receive financial support. The present one-size-fits-all funding mechanism is not appropriate for this sector where there are significant regional differences as well as specific needs within particular segments of the sector.*
- *Public funding is required not only to directly sponsor training, but is needed to enable employers to be able to afford to release staff to train.*
- *The mechanisms for delivering qualification training to the sector needs urgent review, as they are not always meeting the needs of employers, practitioners and the sector as a*

*whole. A wider range of flexible delivery is needed including support for larger employers to develop and deliver work-based training.*

- Small employers need to be encouraged to work together to develop local solutions. In many cases, the mechanisms for this already exist in the shape of the all-Wales childcare organisations (MYM, WPPA, CPCKC, NCMA, NDNA) that need to work with existing work-based learning providers to access public funding.*
- Information about early years and childcare training should be made available consistently in local areas. The Children's Information Services would be well-placed to deliver this but currently have very limited resources.*
- Large numbers of qualified and experienced practitioners are being lost each year in this sector. An extension of the availability of funding to support training and professional development in this sector is required to enable practitioners to build on existing skills and raise their aspirations. This would result in career progression within the sector and in related areas of work*

# Appendix 1: Job Titles and Employers Desired Qualifications

Category	Role	Alternative Job Title	Desired Qualification	Nat. Qual. Framework
Childminders	Childminder	Network Childminder Network Coordinator	Introducing Childminding Practice (Stand-alone unit from L3 Diploma in Home Based Childcare)	Level 3
	Assistant Childminder	Childminding Assistant	ICP	
Crèches	Crèche Assistant	Assistant Crèche Leader Nursery Assistant	NVQ Level 2 Early Years Care & Education	Level 2
	Crèche Worker	Family Worker Nursery Nurse Childcare Worker	BTEC National Diploma in Early Years NNEB Level 3 Early Years Care / Childcare & Education	Level 3
	Crèche Supervisor	Crèche Leader Supervisor	Level 3 Early Years Care / Childcare & Education NNEB	Level 3
Full Daycare	Nursery Nurses	Nursery Officers Care / Play Leader Special Needs Workers Key Worker for Toddlers Key Worker Playcare Worker Team Leaders Rheolwraig Meithrinfa	Level 3 Early Years & Childcare or working towards it or NNEB	Level 3
	Nursery Supervisors	Room Leaders Senior Nursery Nurses Baby Supervisor Toddler Supervisor Pre-school Supervisor Arolygwraig Officer in Charge Senior Team Leader Section Leader Unit Manager	Level 3 EY&C or BTEC National Diploma in Early Years plus experience or NNEB & ADCE	Level 3

Category	Role	Alternative Job Title	Desired Qualification	Nat. Qual. Framework
Full Daycare	Nursery Assistants	Childcare Assistant Lunchtime Cover Staff Special Needs Workers Gweinyddes Feithrin Room Assistant Student Helping Hand	Level 2 Early Years & Childcare or working towards	Level 2
	Early Years Teachers	Nursery Teacher	Qualified Teacher Status with Early Years Specialism Teachers Certificate, Diploma in Early Years	Level 4
	Nursery Managers	Nursery Manager Child Care Co-ordinator Deputy Nursery Manager	Level 3 Early Years & Childcare plus Assessors Qualification or ADCE or NNEB or IOSHQ	Level 3
Open Access Playschemes	Playworkers	Play Leader Care/play leader General Support	NVQ 2 Playwork Sports Coaching Qualifications	Level 2
	Senior Playworkers		NVQ 3 Playwork Sports Coaching Qualifications Sports Science Degree/Dragon Sports	Level 3
	Manager		NVQ 3 Playwork or NNEB	Level 3
Out of School Childcare	Playworkers	Kids Club Assistant Play Leader Assistant	Level 2 Playwork Sports Coaching Certificates	Level 2
	Senior Playworkers	After School Club Leader Nursery Nurse Deputy Play Leader	Level 3 Playwork NNEB Level 3 Early Years	Level 3
	Club Coordinators	After School Supervisor Nursery Supervisor Site Leader	Level 3 Playwork plus experience	Level 3

Category	Role	Alternative Job Title	Desired Qualification	Nat. Qual. Framework
<i>Sessional Daycare</i>	Pre-School Playgroup Assistant	Play Assistant	NVQ level 2 or 3 or working towards	Level 2
	Pre-School Playgroup Worker	Deputy Supervisor Play Leader Project Worker	NVQ Level 3 Diploma in playgroup practice or working towards WPPA Diploma in playgroup practice NNEB	Level 3
	Pre-School Playgroup Leader	Manager Supervisor Senior Project Worker Senior Playworker Registered Person Pre-School Manager	NVQ L3 Early Years Care & Education BTEC National Diploma in Early Years NNEB NVQ 4 Management	Level 3
	Cylth Meithrin Leader	Arweinydd Cylch Meithrin Cynorthwydd	NVQ Level 3 Diploma in Pre-School Practice RGN NVQ 3	Level 3
	Cylth Meithrin Assistant	Cynorthwraig	NVQ 2	Level 2

## Appendix 2: Research Sample Size

	Child-minders	Creches	Full Daycare	Open Access Play	Out of School Care	Sessional Daycare
Conwy	6	0	4	2	3	5
Gwynedd	7	0	3	0	2	7
Ynys Mon	4	1	1	0	1	5
Denbighshire	5	0	5	2	3	4
Flintshire	9	1	4	0	6	6
Wrexham	5	1	5	0	6	6
Powys - Mid Wales	6	0	3	0	2	5
Blaenau Gwent	3	0	1	0	0	1
Caerphilly	11	0	2	0	2	3
Monmouthshire	6	0	2	0	1	3
Newport	8	1	4	0	1	2
Torfaen	5	1	2	0	3	2
Cardiff	22	2	8	1	5	6
Merthyr Tydfil	1	0	1	0	1	1
Rhondda Cynon Taff	11	0	3	3	3	4
The Vale of Glamorgan	13	1	2	1	3	3
Bridgend	8	0	3	0	1	3
Neath Port Talbot	4	0	2	2	1	2
Swansea	9	0	6	1	3	3
Carmarthenshire	5	0	4	0	6	7
Ceredigion	5	0	2	0	2	4
Pembrokeshire	6	0	2	0	3	5
Sample Settings	159	8	69	12	58	87
Sample Workers	166	40	701	63	292	440
<b>Total Sample of Settings</b>	<b>393</b>					
<b>Total Practitioners</b>	<b>1702</b>					

