Childcare Sufficiency Assessment Form

Name of Local Authority: Cyngor Gwynedd Council

Name of responsible officer: Rachel Jones, Childcare Development Officer
Sioned Owen, Early Years Quality Improvement Officer

Date of Completion: 31st March 2017

Principal Statement

The Childcare Act 2006 makes clear that Welsh local authorities have the lead role in securing, so far as is reasonably practicable, sufficient childcare to meet the requirements of parents in their area who require childcare to enable them to:
- take up, or remain, in work; or
- undertake education or training which could reasonably be expected to assist them to obtain work.

Gwynedd Council has a duty to ensure that there are enough childcare places available to meet the demands of parents and carers in Gwynedd.
Childcare is a central part of family life and critical to the economy. Parents require access to quality, affordable and flexible childcare.

The Council supports the development of new childcare where there is sufficient parental demand, and support existing providers to ensure they deliver quality, sustainable childcare. We work closely with providers from all sectors – Private, Voluntary, Independent and Maintained.

Gwynedd Council values the collaboration with key stakeholders in the childcare sector, which ensures positive partnership working to grow and sustain quality provision to meet parents' needs.

Any policies or initiatives from Gwynedd Council or Welsh Government need to ensure that the children's care and wellbeing are central, support's children with Additional Learning Needs, whilst also trying to balance the needs of parents, childcare providers and employers.

1. Contents

1. Introduction/ Context

The Childcare Act 2006 (Local Authority Assessment)(Wales) Regulations 2016 expands and clarifies in legislation the vital role local authorities play as strategic leaders in the provision of childcare locally. The 2006 Act reinforces the framework within which local authorities already work – in partnership with the private, voluntary, independent, community and maintained sector – to shape and secure children's services and focuses in particular on the provision of:
- sufficient, sustainable and flexible childcare that is responsive to parents' needs, and
- information, advice and assistance relating to childcare to parents, prospective parents and those with parental responsibility or care of a child.

Section 22 of the 2006 Act places a duty on local authorities to secure, as far as is reasonably practicable, provision of childcare that is sufficient to meet the requirements of parents in their area to enable them to:-
- take up, or remain, in work; or
- undertake education or training which could reasonably be expected to assist them to obtain work.

It is not the intention to oblige local authorities to meet the individual childcare needs of every working family, but to ensure that at a community level, the local authority is taking strategic action with its partners to address gaps in childcare.

The local authority has a lead role for coordinating the effort across services, to work together to secure sufficient high quality, sustainable provision that is responsive to the needs of children and their families. Section 23 allows local authorities to provide childcare and provides local authorities with the powers they need to engage effectively with childcare providers to fulfil the duty to secure sufficient childcare that this Act places on them.

Regulations made by the Welsh Ministers under Section 26 of the Act, require local authorities to prepare assessments of the sufficiency of childcare provision (Childcare Sufficiency Assessment) in their area and to keep these under review. This is a necessary step to securing sufficient provision, enabling local authorities to identify gaps and establish plans to meet the needs of parents.

Local authorities are expected to support the development of childcare where there is sufficient parental demand that a childcare provider could operate and be sustainable.

Local authorities are required to complete a full Childcare Sufficiency Assessment by the 31st March 2017, and every 5 years after that, with a Progress Report submitted annually on the 31st March each year in between.

Key to the development of Gwynedd Councils Childcare Sufficiency Assessment 2017 has been the partnership working and consultations that have taken place; these are outlined in more detail in Section 2.

The main challenges in undertaking this assessment have been:
- ensuring the accuracy of the CSSIW Self Assessment of Service (SASS) data. Only 81% of Gwynedd childcare providers completed their SASS form during the summer of 2016, therefore this data does not give us the whole picture for the County. There are also inconsistencies in the data as providers have interpreted some questions in different ways.
- the number of parents completing the on-line questionnaire has been minimal, with many reporting that it was too long and complicated. It is therefore not possible to assess an accurate demand for childcare across the whole County with so few responses.

An Action Plan has been drawn up in consultation with the Childcare Sub-Group, and this will guide the work of the Early Years Childcare Development team for the coming 5 years. Funding from the RSG and external grant funding will be used strategically to address the priorities identified in the Action Plan.
As Gwynedd Council has been nominated to be an early adopter of the 30 hours childcare offer, the key findings in the assessment will be instrumental in the next few years in the implementation of the new offer.

The Childcare Sub Group will monitor the progress achieved within the Action Plan on a quarterly basis.
Partnership working with both internal departments and external organisations will be vital in ensuring the continuous improvement in securing sufficient childcare provision for families in Gwynedd.

This draft Childcare Sufficiency Assessment will be presented to the Childcare Sub-Group and Cabinet Members as well as a 28 day public consultation before final submission to Welsh Ministers.

2. Partnership Working and Consultation

Gwynedd Council has consulted widely for the 2017 Childcare Sufficiency Assessment, with a wide range of key stakeholders, partner organisations and agencies being invited to express their views on childcare within the County.
Key consultations for the 2017 CSA were:-

Parents:- An on-line questionnaire was used which was designed by Welsh Government, for all local Authorities to use, in order to ensure consistent data capture across Wales.
The questionnaire was posted on the local authority website from November – December 2017. Links to the questionnaire were sent to all the Council personnel, all Childcare settings within the Authority, all the officers from the Childcare Umbrella Organisations working in the County, and to the Foundation Phase and Flying Start support teachers.
Flyers advertising the on-line questionnaire were given to personnel within the Early Years Unit / Flying Start Health Visitors / Health Visitors within all doctors surgeries in Gwynedd / Gwynedd-Ni (FIS) / libraries / Ti a Fi sessions. The aim being to target as many parents as possible across the whole county.
A total of 347 questionnaires were completed. Feedback received by the Childcare Development Officer was that the questionnaire was too long and complicated, which put many parents off completing it.

A supplementary 'Short Parental Questionnaire' was also developed with 4 key questions for Parents. This questionnaire was distributed to all Families First and Flying Start Support Officers to complete with parents on their group training courses. Play & Early Development Officers also completed these questionnaires with the parents they worked with.
A Focus Group with 11 parents was also held at Plas Pawb.
A total of 48 short questionnaires were completed.

Childcare Providers:- Data for this CSA was provided by CSSIW to all the Welsh Local Authorities. The aim being for a consistent data set to be utilised which would give a national as well as local childcare supply picture.
The new Self Assessment of Service (SASS) data return was used by CSSIW in the summer of 2016 to gather information from all registered childcare settings.
In Gwynedd the return rate was only 81% of settings, which does not give us a complete overview of the supply of childcare within the county. As this was the first time that providers had completed the new SASS there appear to be misunderstandings of either the question asked, or the definitions used, which has resulted in inconsistencies in some of the data.
Where possible, local knowledge has been used to supplement the SASS data.

An additional 'Short Provider Questionnaire' was also developed with 3 key questions. This questionnaire was sent to all the Childcare Providers in the County, and promoted by the umbrella organisation officers.
A total of 23 short questionnaires were completed.

Children:- Questionnaires were distributed to the Out of School Clubs by the Childcare Business Development Officer for Clybiau Plant Cymru Kids Clubs.
To encourage the children to complete the questionnaire, there was a prize draw to win a £10 Argos voucher.
A total of 17 questionnaires were completed by children ranging in age from 7 – 11 years old.

Primary School Head teachers:- a questionnaire was e-mailed to all Primary School Head teachers in the County.
A total of 26 questionnaires were completed.

Employers:- a questionnaire was sent to a range of employers within the County.
A total of 2 questionnaires were completed.

Umbrella Organisations:- a questionnaire was sent to all the Cwlwm partners.
A total of 4 questionnaires were completed.
The CSA was also discussed at the quarterly Childcare Sub-Group Meetings. Representatives from all the Childcare Umbrella Organisations, Healthy Pre-School Scheme, CSSIW, PaCE, Gwynedd-Ni and Flying Start are invited to all the meetings.

Job Centre Plus:- consultation was conducted via the PaCE officers within the County.

Neighbouring Local Authorities:- data regarding children accessing childcare, within Gwynedd, from outside the county was shared with neighbouring authorities. Data was received from one local authorities regarding children from Gwynedd accessing childcare outside the county.

Consultations and discussions were also conducted with the following departments within the Local Authority:-
Safeguarding Children Board via the Chair of the Gwynedd & Môn Local Delivery Group
Welsh Medium Education Forum
Education Department
Planning Department
Gwynedd-Ni (Family Information Service)

Families First
Flying Start
Derwen
Economy & Community Development – Play Sufficiency Assessment

All the information gathered during the consultation process has been collated and summarized in section 14.
The information has been instrumental in the development of the Action Plan and identifying areas for improvement.
Gwynedd Council would like to thank everyone for their contribution.

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

The new Well-being of Future Generations (Wales) Act came into force in Wales on April 1st 2016, and is about improving the social, economic, environmental and cultural well-being of Wales.
The Act requires public bodies within Wales to ensure that they make decisions that meet the needs of current and future generations.

The Act puts in place seven well-being goals:-
- A globally responsible Wales
- A prosperous Wales
- A resilient Wales
- A healthier Wales
- A more equal Wales
- A Wales of cohesive communities
- A Wales of vibrant culture and thriving Welsh language

A new Public Services Board has been established covering Gwynedd and Anglesey, and its main task will be to prepare and publish a detailed assessment of the state of economic, social, environmental and cultural well-being in Gwynedd and Anglesey. Following this, the Board is expected over the coming years to prepare and publish the Local Well-being Plan for Gwynedd and Anglesey which will determine local objectives and implement action points in order to address these objectives and to produce annual progress reports.

The Public Service Board have designated 8 'Well-Being Areas' within Gwynedd, and after consultation, it has been decided that the Childcare Sufficiency Assessment will use the same 8 areas in it's reporting, in order to align both reports.
Joint meetings and consultations have been held with the officers responsible for the Well-Being Needs Assessment, with relevant data shared as needed.
The CSA will take due consideration of any recommendations within the Local Well-Being Plan, now, and in future years, with collaborative working between both assessments ensuring the best outcomes for the people of Gwynedd.

Gwynedd Well-being Assessment Areas
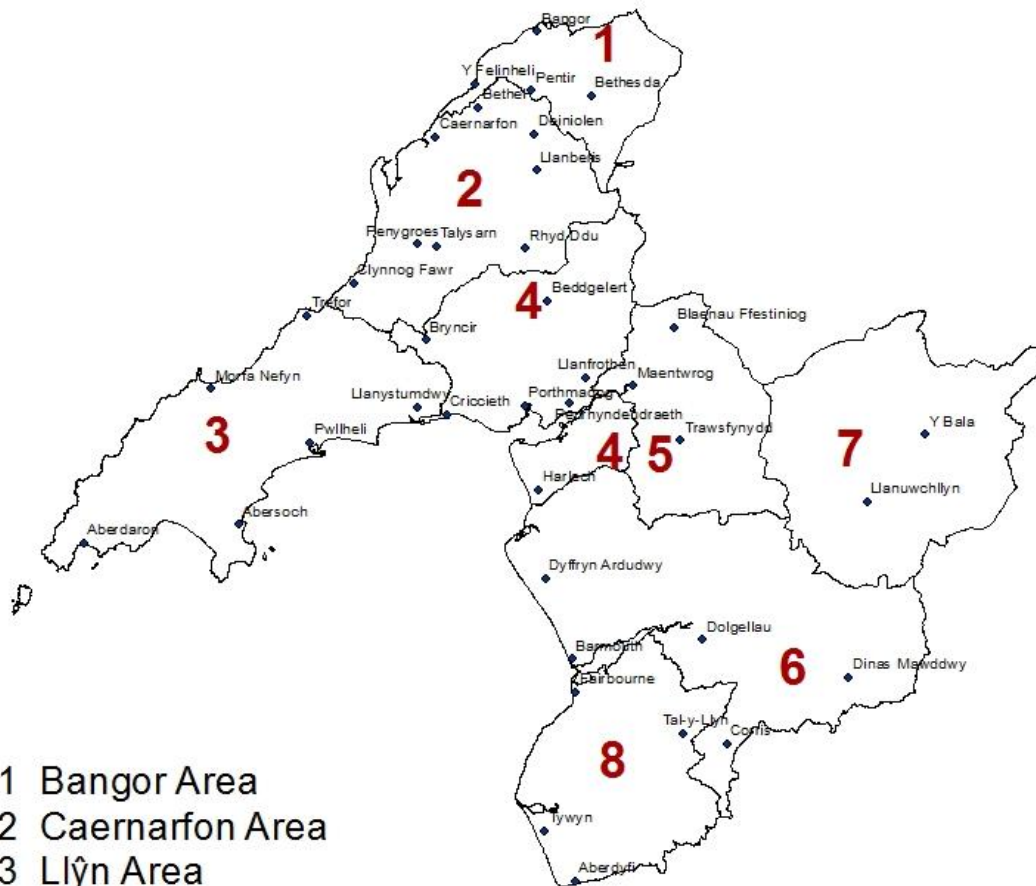
1 Bangor Area
2 Caernarfon Area
3 Llŷn Area
4 Porthmadog Area
5 Ffestiniog Area
6 Dolgellau Area
7 Penllyn Area
8 Tywyn Area

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1. Population

The resident population for Gwynedd in 2014 was 122,273, across an area of 2,535 square kilometres. This gives a population density in Gwynedd of 48 people per km, compared to 149 people per km for Wales.

	Males	Females	Total
Gwynedd	60,541	61,732	122,273
Wales	1,521,315	1,570,721	3,092,036
Bangor	14,642	14,774	29,416
Caernarfon	16,103	16,544	32,647
Llŷn	9,480	9,613	19,093
Porthmadog	6,008	6,271	12,279
Ffestiniog	3,224	3,279	6,503
Dolgellau	5,225	5,249	10,474
Penllyn	2,235	2,210	4,445
Tywyn	3,624	3,792	7,416

Source – calculated from 'Mid-2014 Population Estimates for 2014 Wards in England and Wales by Single Year of Age and Sex', Office for National Statistics

Proportion of Population in each age group

	Aged 0-4	Aged 5-9	Aged 10-14	Aged 15-19	Aged 20-24	Aged 25-29	Aged 30-34	Aged 35-39	Aged 40-44	Aged 45-49	Aged 50-54	Aged 55-59	Aged 60-64	Aged 65-69	Aged 70-74	Aged 75-79	Aged 80-84	Aged 85-89	Aged 90+
Gwynedd	5.4%	5.6%	5.1%	6.2%	8.6%	5.6%	5.1%	4.7%	6.0%	6.5%	6.6%	6.2%	6.1%	6.8%	5.2%	4.0%	3.2%	2.0%	1.1%
Wales	5.7%	5.7%	5.3%	6.1%	7.0%	6.2%	5.9%	5.4%	6.4%	7.0%	7.0%	6.2%	6.1%	6.2%	4.7%	3.7%	2.7%	1.6%	0.9%
Bangor	5.2%	5.1%	4.6%	8.7%	19%	6.3%	5.5%	4.8%	5.8%	5.5%	5.6%	4.7%	4.2%	4.6%	3.1%	2.5%	2.3%	1.2%	0.8%
Caernarfon	6.2%	6.5%	5.9%	5.9%	5.5%	6.0%	5.8%	5.0%	7.0%	7.1%	6.8%	6.2%	6.1%	6.3%	4.7%	3.6%	2.5%	1.8%	1.0%
Llŷn	5.3%	5.8%	5.2%	5.5%	5.1%	5.0%	4.7%	4.7%	6.1%	7.1%	6.8%	6.5%	6.4%	7.7%	6.0%	4.7%	3.7%	2.4%	1.3%
Porthmadog	4.6%	5.4%	4.8%	5.2%	5.0%	4.8%	4.3%	4.5%	5.4%	6.2%	6.6%	6.9%	7.2%	8.9%	6.9%	5.3%	3.8%	2.8%	1.5%
Ffestiniog	6.0%	5.9%	5.7%	6.2%	6.1%	5.4%	4.4%	4.9%	5.7%	6.8%	7.7%	6.6%	6.5%	6.8%	5.0%	4.2%	3.0%	2.2%	0.8%
Dolgellau	4.8%	5.0%	4.6%	4.8%	4.1%	5.1%	4.4%	3.9%	5.5%	6.8%	7.0%	7.2%	7.7%	8.7%	6.6%	5.0%	4.4%	2.5%	1.8%
Penllyn	6.1%	5.7%	5.0%	5.3%	5.8%	5.4%	5.7%	5.7%	5.8%	6.3%	7.5%	7.2%	6.4%	6.9%	5.2%	3.8%	3.7%	1.7%	0.9%
Tywyn	3.8%	4.1%	4.0%	3.7%	3.9%	4.4%	3.5%	3.5%	4.6%	6.4%	7.1%	8.0%	8.3%	9.9%	8.4%	6.3%	5.3%	2.9%	1.8%

Source – calculated from 'Mid-2014 Population Estimates for 2014 Wards in England and Wales by Single Year of Age and Sex', Office for National Statistics

In order to understand the context of having to develop childcare provision under Section 22 of the Childcare Act 2006, it is important to look at the county's population of children and young people.
Children and young people in the 0 – 14 age group represent 16.1% of the population in Gwynedd, compared to 16.7% in Wales.

The highest percentage of children in the 0 – 14 age group are in the Caernarfon area – 18.6%
The lowest percentage of children in the 0 – 14 age group are in the Tywyn area – 11.9%

Live Births

The live birth rate in Gwynedd has only fluctuated slightly since 2001.
There were 144 fewer live births in 2014 compared to 2011.

Live Births in Gwynedd, 2001 - 2014

Year	Number of Live Births
2001	1,209
2002	1,133
2003	1,156
2004	1,198
2005	1,264
2006	1,331
2007	1,255
2008	1,276
2009	1,338
2010	1,270
2011	1,319
2012	1,327
2013	1,229
2014	1,175

Source – Office for National Statistics

Population Projections

Population aged 0-15	2016	2026	% increase between 2016 and 2026	2036	% increase between 2016 and 2036
Gwynedd	20,294	20,470	0.9%	21,421	5.6%
Wales	562,252	582,120	3.5%	551,117	-2.0%

Population aged 16-39	2016	2026	% increase between 2016 and 2026	2036	% increase between 2016 and 2036
Gwynedd	37,594	42,329	12.6%	42,141	12.1%
Wales	933,106	951,518	2.0%	941,582	0.9%

Population aged 40-64	2016	2026	% increase between 2016 and 2026	2036	% increase between 2016 and 2036
Gwynedd	37,697	34,454	-8.6%	34,908	-7.4%
Wales	998,890	974,837	-2.4%	970,987	-2.8%

Population aged 65-79	2016	2026	% increase between 2016 and 2026	2036	% increase between 2016 and 2036
Gwynedd	19,730	20,183	2.3%	20,942	6.1%
Wales	466,945	516,737	10.7%	560,477	20.0%

Population aged 80+	2016	2026	% increase between 2016 and 2026	2036	% increase between 2016 and 2036
Gwynedd	7,806	10,125	29.7%	12,436	59.3%
Wales	169,978	230,959	35.9%	309,370	82.0%

Total population	2016	2026	% increase between 2016 and 2026	2036	% increase between 2016 and 2036
Gwynedd	123,126	127,557	3.6%	131,847	7.1%
Wales	3,131,172	3,256,174	4.0%	3,333,536	6.5%

Source – Population projections 2011 based for local authorities in Wales, Welsh Government (2013)

The overall population in Gwynedd is projected to steadily increase over the next 20 years, with 8,721 more residents in the County in 2036 compared to 2016.

Within the 0 -15 age group, there is only a slight projected increase of 0.9% between 2016 and 2026, but a 5.6% increase by 2036, meaning there will be 1,127 more 0 – 15 year olds in the County in 2036 compared to 2016.

The largest projected increase in population is however in the 80+ age group, with an increase of 59.3% projected by 2036.

Vulnerable Children

On the 31st December 2016, there were 220 'looked after children' in Gwynedd, in the following age ranges:

	Age 0-4 years	Age 5-11 years	Age 12-17 years	Total
Number of looked after children	60	86	74	220

On the 31st December 2016, there were 79 children on the Child protection Register, in the following age ranges:

	Age 0-4 years	Age 5-11 years	Age 12-17 years	Total
Number of children on the Child Protection Register	36	26	17	79

Children with Disabilities

	Age 0-4 years	Age 5-11 years	Age 12-17 years	Total
Number of Children open to Derwen services	57	97	113	267

(**Derwen** is the Integrated Team for Disabled Children who work with children and young people aged 0-18 in Gwynedd)

Welsh Language Skills (as % of population aged 3 and over)

	No skills in Welsh	Can understand spoken Welsh only	Can speak Welsh	Can speak but cannot read or write Welsh	Can speak and read but cannot write Welsh	Can speak, read and write Welsh	Other combination of skills in Welsh
Gwynedd	26.5	6.9	65.4	5.8	3.4	56.0	1.5
Wales	73.3	5.3	19.0	2.7	1.5	14.6	2.5
Bangor	38.1	9.3	50.6	5.9	3.4	41.0	2.2
Caernarfon	13.3	5.4	80.4	6.5	3.6	69.9	1.2
Llŷn	21.0	5.3	72.9	5.2	3.0	64.5	1.0
Porthmadog	25.8	6.6	66.6	5.3	3.0	58.0	1.3
Ffestiniog	17.2	4.6	77.2	5.8	3.1	68.2	1.1
Dolgellau	35.7	8.6	54.0	6.3	3.6	43.9	1.9
Penllyn	17.7	5.4	75.8	5.9	3.5	66.3	1.2
Tywyn	51.0	8.7	38.6	4.0	3.4	31.0	1.9

Source – Census Data 2011 – ONS, Nomis Table KS207WA

The Welsh language skills of people living in Gwynedd are much higher than Wales overall.
65.4% of the population aged over 3 years can speak Welsh, and 56% can speak, read and write Welsh. This compares with 19% and 14.6% respectively in Wales.

There are however large differences within the different areas of Gwynedd, with the Caernarfon area having the largest percentage of Welsh speakers at 80.4%, and the Tywyn area having the lowest percentage at 38.6%.
This is also the case for those that can speak, read and write Welsh. The Caernarfon area has the highest percentage at 69.9%, and the Tywyn area has the lowest percentage with 31%.
The Tywyn area also has the highest percentage of the population with no skills in Welsh - 51%.

Household Composition

In 2013, there was a total of 52,473 households in Gwynedd, and of these, 13,014 had dependant children.

	All Households with dependant children	Married or same-sex civil partnership couple	Cohabiting couple	Lone parent	Other household types
Gwynedd	13,014	6,402	2,574	3,054	984

Source – Census Data 2011 – ONS, Nomis Table KS105EW

In Gwynedd there are 22,441 parents with dependant children, of these 19,932 are either both working, or have one parent working. 2509 parents with dependant children are not working.

	All categories: Family status by number of parents working	Couple family: Total	Couple family: Both parents working	Couple family: One parent working	Couple family: No parents working	Lone parent family: Total	Lone parent family: Parent working	Lone parent family: Parent not working
Dependent Children								
All categories: Dependent children in family	22,441	18,907	13,486	4,218	1,203	3,534	2,228	1,306
One dependent child in family	9,260	7,258	5,344	1,469	445	2,002	1,333	669
Two dependent children in family	8,608	7,569	5,734	1,455	380	1,039	656	383
Three or more dependent children in family	4,573	4,080	2,408	1,294	378	493	239	254

Source – Census Data 2011 – ONS, Nomis Table DC1601EWLA

In Gwynedd 16.8% of children, aged under 16 years, live in low income families. This compares to 22.6% for Wales as a whole.

- 2520 children live in a family receiving Income Support or Income-Based Jobseekers Allowance.
- 350 children live in a family receiving Working Tax Credit and Child Tax Credit, and whose reported income is less than 60% of median income.
- 455 children live in a family receiving Child Tax Credit only, and whose reported income is less than 60% of median income.
- 19,845 children live in a family receiving Child Benefit.

Car or Van Availability

In Gwynedd 21.4% of households have no access to a car or van. This is a slightly lower percentage than Wales as a whole – 22.9%. But as Gwynedd is one of the most rural counties in Wales, having no access to a car or van is a major disadvantage.

Car or Van Availabilty		
All households	52,473	
No cars or vans in household	11,230	21.4%
1 car or van in household	22,788	43.4%
2 cars or vans in household	13,628	26.0%
3 cars or vans in household	3,417	6.5%
4 or more cars or vans in household	1,410	2.7%

Source – Census Data 2011 – ONS, Nomis Table QS416EW

Ethnic Background

The table below shows which ethnic group the people of Gwynedd classify themselves.

Ethnic Group		
All usual residents	**121,874**	
White	**117,573**	**96.5%**
English/Welsh/Scottish/Northern Irish/British	115,072	94.4%
Irish	570	0.5%
Gypsy or Irish Traveller	153	0.1%
Other White	1,778	1.5%
Mixed/multiple ethnic group	**964**	**0.8%**
White and Black Caribbean	287	0.2%
White and Black African	126	0.1%
White and Asian	332	0.3%
Other Mixed	219	0.2%
Asian/Asian British	**2,170**	**1.8%**
Indian	461	0.4%
Pakistani	220	0.2%
Bangladeshi	176	0.1%
Chinese	905	0.7%
Other Asian	408	0.3%
Black/African/Caribbean/Black British	**289**	**0.2%**
African	195	0.2%
Caribbean	70	0.1%
Other Black	24	0.0%
Other ethnic group	**878**	**0.7%**
Arab	700	0.6%
Any other ethnic group	178	0.1%

Source – Census Data 2011 Table KS201EW

5. Overview – Childcare Types, Services and Places

Number of Childcare Providers & Type of Services

The table below gives a complete overview of all the childcare settings within the county using information gathered by Gwynedd-Ni (Family Information Service) in December 2016.

Childcare Type	Total Number	Total Number of Registered Places
Childminders	101	640
Full Day Care Nurseries	20	919
Cylch Meithrin / Playgroup (Sessional)	67	1957
Wraparound	27	703
After School Clubs (registered)	29	725
After School Clubs (not registered)	10	208
Holiday Clubs	13	376
Holiday Playschemes	3	86
Breakfast Clubs	84	2737
Nanny	3	

Data from the CSSIW Self Assessment of Service Statements(SASS) has been used to complete the following sections. However as only 81% of Childcare settings completed their SASS forms this does not give us a complete picture of the supply of childcare in the county.
We have no data in the following tables for unregistered settings – those that operate for under 2 hours a day and are not registered with CSSIW. We are aware of 9 unregistered After School Clubs and 2 Sessional Cylch Meithrin in Gwynedd.

The Childcare settings have completed their SASS data according to their CSSIW Registration, which in some cases means that their 'Childcare Type' differs slightly to that noted by Gwynedd – Ni.
e.g. many Sessional Playgroup settings are now registered with CSSIW as 'Full Day Care' due to the hours that they are open.

Childcare Type	Registered	Unregistered/ Approved)	Childcare Services Offered	Registered	Unregistered/ Approved
Childminder	77		Full day care throughout the year	77	
			Half day care throughout the year	53	
			Before school	53	
			After school	64	
			Wrap Around	36	
			Holiday Provision	52	
			Other	1	
Day Care					
Full Day Care	25		Full day nursery throughout the year	20	
			Half day nursery throughout the year	15	
			Before school	6	
			Morning Playgroup / Cylch Meithrin	7	
			Afternoon Playgroup / Cylch Meithrin	5	
			After school	14	
			Wrap Around	11	
			Lunch	10	
			Holiday Provision	13	
			Crèche	4	
			Other		
Sessional Day Care	51		Morning Playgroup/ Cylch Meithrin	44	
			Afternoon Playgroup/ Cylch Meithrin	10	
			Wrap Around	10	
			Lunch	16	
			Other	1	

Crèches	0		Operates Full Day		
			Operates Mornings		
			Operates Afternoons		
			Holiday Provision		
			Other		
Out of School Care	9		Before School	1	
			After School	8	
			Holiday Provision	3	
			Playscheme sessions	1	
			Other		
Open Access Play Provision	0		Before School		
			After School		
			Holiday Provision		
			Playscheme sessions		
			Other		
Nanny	0		Full day care throughout the year		
			Half day care through out the year		
			Before school		
			After school		
			Wrap around a part time Early Education placement, e.g. playgroup or school nursery		
			Holiday provision in the school holidays		
			Other		
TOTAL	162				

Source: CSSIW SASS Data 2016

Geographical Distribution of Childcare Providers & Services Provided

The distribution of all Childcare providers is very uneven across Gwynedd.
Areas 1 and 2 (Bangor & Caernarfon) have the greatest supply of all types of childcare, they are also the most densely populated areas of the county – total population of 29,416 and 32,647 respectively. They are also the areas with the largest employers in the county – Gwynedd Council, Ysbyty Gwynedd and Bangor University.
There is a gradual decrease in the number of providers as you go further south in the county, with Areas 7 and 8 (Penllyn and Tywyn) having a limited supply of all childcare types. These areas are the least populated in the county – total population of 4,445 and 7,416 total respectively.

Area 1 (Bangor) has a good distribution of all childcare types.

Area 2 (Caernarfon) has a good distribution of all childcare types, and the largest number of registered childminders in the County. There are wards within this area, such as Cwm y Glo / Llanberis which have a large number of childminders compared to the resident population, and where further registrations would be unsustainable.

Area 3 (Llŷn) although there appears to be a good supply of childcare in the area, most of this is located in the 'top end' of the area (Llanystumdwy / Pwllheli / Nefyn) with very limited supply at the far end of the Llŷn Peninsula. Aberdaron / Bryncroes / Llanengan only have sessional Cylchoedd Meithrin, this is a large area with no full day care, Childminder, after school or holiday provision.

Area 4 (Porthmadog) although there appears to be a good supply of childcare in the area, most of this is located in and around the main town of Porthmadog, with very limited supply in the rural areas.

Area 5 (Ffestiniog) there is a reasonable supply of childminders in the Blaenau Ffestiniog area and one full day care nursery, however there is only unregistered after school and holiday provision. Again, there is very limited, if any, childcare in the rural areas.

Area 6 (Dolgellau) is extremely limited in the supply of childminders, with only 2 registered childminders working in one setting in Dyffryn Ardudwy. There are only 2 Full day Care Nurseries covering a large area, and there is very limited holiday provision. After school provision has improved within the last year with the opening of a new after school club in Dolgellau.

Area 7 (Penllyn) is very limited in the supply of all childcare types, with only one full day care nursery located in Bala, which also has an after school club and holiday provision. Again, there is very limited, if any, childcare in the rural areas.

Area 8 (Tywyn) is very limited in the supply of all childcare types, but there has been an improvement in recent years with the opening of a full day care nursery with after school club and holiday provision in the area.

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	540	652	558	292	12	97
Day Care						
Full Day Nursery	962	1766	1272	751	26	125
Sessional Day Care	1046	1520	1399	678	64	65
Crèches**						28
Out of School Care	262	234	299	162	67	55
Open Access Play Provision	0					29
Nanny	0					24

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	414	414	1323	62	8	18
Day Care						
Full Day Nursery	781	781	2808	8	0	6
Sessional Day Care	96	96	102	0	0	0
Crèches**						13
Out of School Care	112	112	359	182	0	38
Open Access Play Provision	0					30
Nanny	0					6

Source: CSSIW SASS Data 2016

*Data for the number of vacancies is inconsistent as settings have used different methods of calculation – this data cannot therefore be taken into account as a true reflection of the number of vacancies in the childcare settings.

**Many parents refer to Full Day Nurseries as a 'Crèche, therefore data under this heading may be mis-leading

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

Area 1 (Bangor) only Full Day Care settings reported that they had a waiting list during term time, this was evenly distributed across all three terms, and was for full day nursery only.

Area 2 (Caernarfon) Childminders, Sessional and Out of School Care settings all reported that they had a waiting list during term time.
Childminders – the waiting list was for full day care only.
Sessional settings – the waiting list was for Welsh language Cylch Meithrin morning sessions, with the highest proportion being for the summer term.
Out of School Care – the waiting list was for after school care in all 3 terms.

This area has the greatest supply of childcare, but also the highest demand due to being both highly populated and due to the density of employers.

Area 3 (Llŷn) Childminders and Sessional settings reported that they had a waiting list during term time.
Childminders – the waiting list was for full day care only.
Sessional settings – the waiting list was for bilingual Cylch Meithrin morning sessions during the summer term.

Area 4 (Porthmadog) Full Day Care and Sessional settings reported that they had a waiting list during term time.
Full Day Care – the waiting list was mainly during the summer term, for full day nursery and after school care.
Sessional settings – the waiting list was for Welsh language Cylch Meithrin morning sessions during the summer term.

Area 5 (Ffestiniog) only Childminders reported that they had a waiting list during term time, this was for Welsh language full day care during the summer term.

Area 6 (Dolgellau) no waiting lists reported.
Area 7 (Penllyn) no waiting lists reported.

Area 8 (Tywyn) only Sessional settings reported that they had a waiting list during term time, this was for English language morning and afternoon sessions during all three terms.

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

The only reported waiting lists during school holidays were for childminders in Areas 2 (Caernarfon) and 5 (Ffestiniog)
-   this was for full day care during the Summer and October half term holidays only.

No SASS data was received for Open Access Play Provision or Nannies, however we are aware of 3 Playschemes that run during the school holidays in Area 1(Bangor) and Area 2 (Caernarfon), and of 3 Nannies that work in Area 2 (Caernarfon), Area 3 (Llŷn) and Area 6 (Dolgellau).
Data from the Parent Questionnaire shows a demand for Open Access Play Provision and Nannies, both during school term time and holidays.

6. Supply of Childcare

6.1 Childminder

**Analysis of Supply of Childcare Provision**

In Gwynedd we have a total of 101 registered childminder settings providing a total of 640 registered places. In addition there are 5 childminders who have currently voluntarily suspended their registration (i.e registered with CSSIW but not currently providing a service)

During the last 2 years we have had 19 new registrations in locations across the whole county, but during these 2 years we have also had 30 childminders cancelling their registrations, giving us a net reduction of 11 childminders in 2 years.

We currently have 10 candidates either attending pre-registration training, in the process of completing their CSSIW registration application or have submitted their application and are awaiting their CSSIW registration.

Of these 101 registered childminder settings, only 77 completed the online SASS return in 2016.

The chart below shows that there is not an even distribution of childminders across the County, with a significant reduction in the numbers of childminders in the areas to the south.
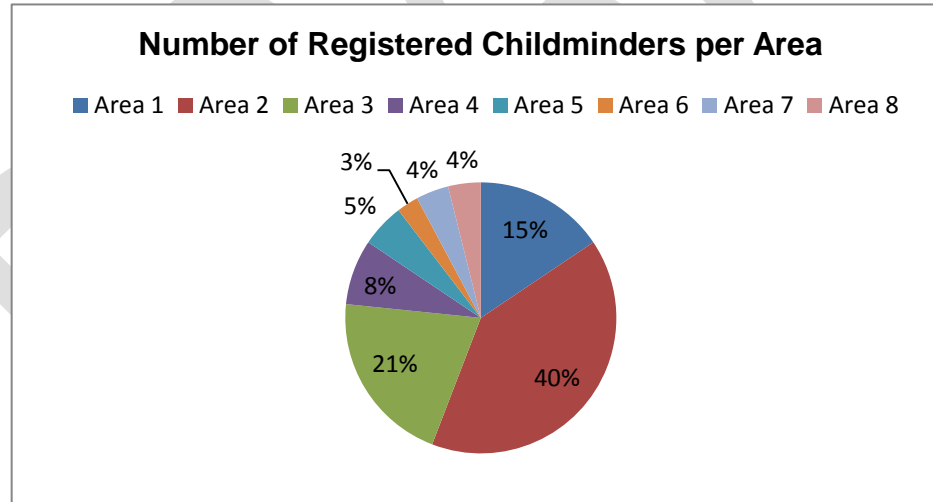
Number of Registered Childminders per Area

■ Area 1 ■ Area 2 ■ Area 3 ■ Area 4 ■ Area 5 ■ Area 6 ■ Area 7 ■ Area 8

3% — 4% 4%
5%
15%
8%
21%
40%

Source: CSSIW SASS Data 2016

29

Range of services provided

The table below shows the range of services offered by childminders in each of the areas

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Total Number of Childminders	12	31	16	6	4	2	3	3
Full Day Care	12	31	16	6	4	2	3	3
Half Day Care (am)	10	20	13	5	2		1	2
Half Day Care (pm)	10	19	11	4	2		1	2
Before School	7	21	12	6	3		3	1
After School	10	24	15	6	4		3	2
Wrap Around	3	17	6	5	2		1	2
Holiday Provision	10	19	11	6	2		2	2
Other:- weekend/late night after 6pm	1							

Source: CSSIW SASS Data 2016

The majority of childminders offer the full range of services, however only 46% offer a wrap-around service and only 1 childminder noted that she offered a weekend / late night after 6pm service to parents.
Childminders in Area 6 (Dolgellau) only provide a full day care service.

Number and type of child places filled (full time, part time, ad-hoc)
Term Time
The table below shows the maximum number of places available during school term time

Full day Care	316
Half Day Care (am)	43
Half Day Care (p.m)	40
Before School	77
After School	151
Wrap Around	25
Total Maximum Capacity	**652**

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled according to the type of service

	Full Time	Part Time	Ad-hoc
Full day Care	120	177	8
Half Day Care (am)	10	23	3
Half Day Care (p.m)	5	16	1
Before School	20	22	1
After School	56	70	9
Wrap Around	4	12	1
Total Number of Children Attending	**215**	**320**	**23**

Source: CSSIW SASS Data 2016

39% of children attend a childminder setting on a full time basis, 57% attend on a part time basis and only 4% attend ad-hoc.
The numbers vary slightly in different areas, but the picture is very similar across the whole County, with the highest percentage of children attending on a part time basis.

School Holidays

According to the CSSIW SASS data, there are a total of 414 places available during school holidays.

The table below shows the number of places available in each area

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Maximum capacity during school holidays	60	166	93	30	17	20	14	14

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled during each holiday

	Full Time	Part Time	Ad-hoc	Total
Summer Holiday	90	205	14	309
October Half Term	73	144	12	229
Christmas Holiday	38	75	10	123
February Half Term	68	144	13	225
Easter Holiday	59	140	13	212
May Half Term	73	139	13	225
Total Number of Children Attending	**401**	**847**	**75**	**1323**

Source: CSSIW SASS Data 2016

30% of children attend a childminder setting on a full time basis during school holidays, 64% attend on a part time basis and 5% attend ad-hoc.

Attendance is highest during the summer holidays, with attendance during the half-term and Easter holidays being very similar, attendance is low during the Christmas holiday period.

The numbers vary slightly in different areas, but the picture is very similar across the whole County, with the highest percentage of children attending on a part time basis

Number of places filled by children who have additional learning needs or who require specialist care due to a disability

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Total number of children with additional learning needs or disability	1	3	0	2	1	0	0	0
Number of children with statements or awaiting formal assessment								
Speech, language and communication difficulties		1		1	1			
Specific learning (e.g. dyslexia, ADHD, Dyspraxia)		1						
Hearing difficulties								
Learning difficulties (e.g. global development delay etc.)		1		1				
Visual difficulties								
Emotional and behavioural difficulties								
Physical	1							
Medical condition (specify)								

Source: CSSIW SASS Data 2016

Very few childminders in Gwynedd noted that they care for a child with additional learning needs or who require specialist care due to a disability.

Number of Welsh Language places filled

Of the 77 childminders who completed the CSSIW SASS return, 18 stated that their service was Welsh language, 47 Welsh and English (bilingual), 11 English language and 1 English with some bilingual elements.

The table below shows the number of childminders according to the language of their provision, in each area

Language of Provision	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Welsh		8	3	2	4		1	
Welsh & English	8	21	11	3		2	2	
English	4	2	2	1				2
English & some bilingual elements								1

Source: CSSIW SASS Data 2016

85% of childminder provision in Gwynedd is either through the medium of Welsh or Bilingual, only 15% is delivered in English or in English with some bilingual elements.
However, there is a large variation in some areas, with Area 5 (Ffestiniog) only having Welsh language provision, and Area 8 (Tywyn) only having English or English with some bilingual elements provision. 33% of childminding provision in Area 1(Bangor) is English language.

The table below shows the total number of childcare places available according to the language of the provision

Number of places available	Welsh	Welsh & English	English	English & some bilingual elements
Term time	168	395	82	7
School Holidays	78	272	64	0

Source: CSSIW SASS Data 2016

Vacancies and Waiting Lists

The number of vacancies recorded in the CSSIW SASS data is inconsistent as settings have used different methods of calculation – this data cannot therefore be taken in to account as a true reflection of the number of vacancies. Some settings have also recorded that they have a waiting list for the same service for which that they have recorded a vacancy.

The table below shows the number of childminders with waiting lists, per area, according to the language of their provision.

		Language of Provision											
		Welsh			Welsh & English			English & some bilingual elements			English		
		Area			Area			Area			Area		
		2	**3**	**5**	**2**	**3**	**5**	**2**	**3**	**5**	**2**	**3**	**5**
Spring Term													
Full Day Care		2	1		2								
Summer Term													
Full Day Care				2									
Autumn Term													
Full Day Care			1		2	2							
Summer Holidays													
Full Day Care				2	2								
October Half Term													
Full Day Care					3								

Source: CSSIW SASS Data 2016

Only Welsh and Bilingual childminders in Areas 2, 3 and 5 reported that they had a waiting list, either during term time or school holidays or both.

Opening Times

The CSSIW SASS data showed a wide range of different opening and closing times for childminders across Gwynedd.

The table below summarises the data according to the language of the provision.

Welsh		Start Time	Finish Time
	11 childminders	2 before 07:30 8 at 08:00 1 at 08:30	2 at 17:00 4 at 17:30 5 at 18:00
Welsh & English	35 childminders	12 before 07:30 20 before 08:00 3 at 08:30	1 at 16:30 6 at 17:00 15 at 17:30 13 at 18:00
English & some bilingual elements	1 childminder	08:00	15:30
English	10 childminders	4 before 07:30 4 at 08:00 2 at 08:30	1 at 16:30 2 at 17:30 6 at 18:00 1 at 18:30

Source: CSSIW SASS Data 2016

20 childminders did not give an answer to this part of the SASS return.

18 childminders stated that they start work before 07:30, with the majority finishing by 6pm, only 1 childminder noted that they finished work at 6:30pm.

The data for the number of weeks open during the school holidays was incomplete, but of those that had completed this section, the majority were open during the half-term holidays and for a varying number of weeks during the summer holidays. Very few specified that they were open during the Easter and Christmas holidays.

Only 1 childminder, in Area 2 (Bangor) noted that she offered a weekend / late night after 6pm service to parents.
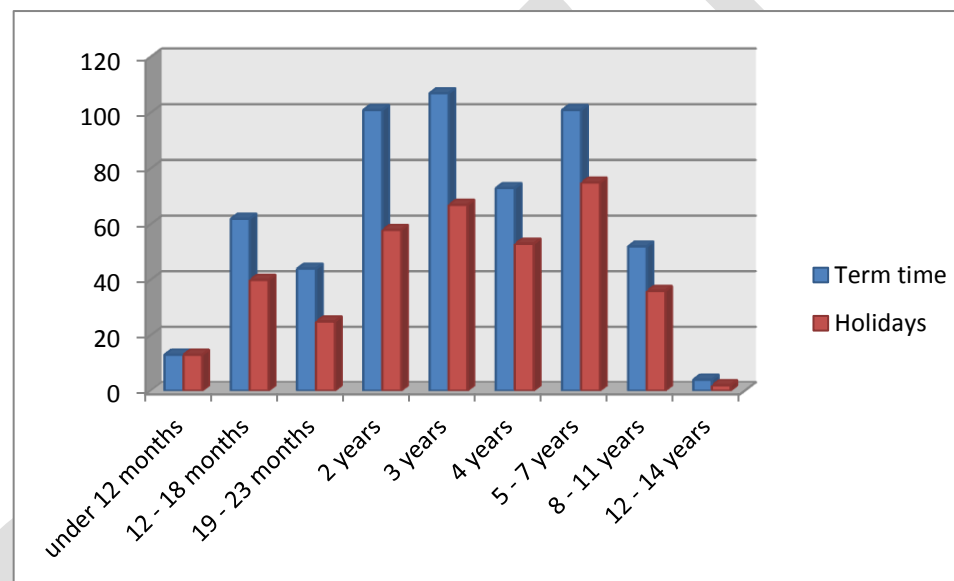
Age Range of Children

The table below shows the range of ages of children that childminders can accommodate. The vast majority care for children aged between 12 months and 7 years of age, with fewer caring for children aged under 12 months and over 8 years, and only two childminders stating that they are able to care for children aged 12-14 years.

Age Range	Number of Childminders
Under 12 months	39
12 – 18 months	74
19 – 23 months	74
2 years	77
3 years	75
4 years	69
5 – 7 years	61
8 – 11 years	42
12 – 14 years	2
15 – 17 years	0

Source: CSSIW SASS Data 2016

The chart below shows the number of children attending a childminding setting during school term time and during the holidays.

Source: CSSIW SASS Data 2016

There is a marked decrease in the number of children attending during the school holidays across all age groups, except for those under 12 months of age.

Range of Charges

It is extremely difficult to analyse the range of charges as some childminders completed this section using their hourly rate others have used their daily rate, and some have used their session rate. Some childminders did not complete this section.
With no indication of the hours covered it is very difficult to summarise the true cost for each session, however the table below shows the range of fees for each service they provided, as completed in the CSSIW SASS return.

	Range of Costs per Service Provided			
	Welsh	Welsh & English	English	English & some bilingual elements
Full Day Care	£22.50 - £38.00	£28.00 - £45.00	£30.00 - £32.00	
Half Day Care a.m.	£15.00 - £18.90	£14.00 - £25.00	£15.00 - £20.00	
Half Day Care p.m.	£17.00 - £18.00	£14.00 - £25.00	£15.00 - £20.00	
Before School	£2.50 - £10.00	£3.50 - £15.00	£3.00 - £15.00	
After School	£3.80 - £15.00	£3.50 - £17.50	£4.00 - £15.00	
Wrap Around	£3.20 - £10.00	£3.10 - £32.00	£10.00 - £10.00	
Holiday Provision a.m.	£4.50 - £17.00	£4.00 - £32.00	£4.00 -£15.00	
Holiday Provision p.m.	£4.50 - £17.00	£4.00 - £30.00	£4.00 - £15.00	
Other	£5.00 - £22.00	£3.20 - £4.50	£5.00 - £12.00	

Source: CSSIW SASS Data 2016

The lowest full day care rate of £22.50 is in Area 2 (Caernarfon), and the highest full day care rate of £45 is in Area 4 (Porthmadog)

8 childminders stated that they charge an additional cost for meals, snacks, nappies, transport and outings.

20 childminders stated that they offer a discount for siblings, this varied from a 10 - 30% discount , £2.00 - £5.00 discount per day, 50p - £1.00 discount per hour.
55 childminders stated that they do not offer a discount for siblings.

Summary of key strengths and weaknesses

There is not an even distribution of childminders across the county, the highest numbers are in Area 1 (Bangor) and Area 2 (Caernarfon), which are also the areas with the highest population and employment opportunities.
We have extremely limited childminder availability in Area 6 (Dolgellau), with only 3 childminders working in one registered setting in the whole area.
There is a limited choice of childminders in many rural areas, particularly the far end of the Llŷn Peninsula (Area 3), and within Areas 7 (Penllyn) and Area 8 (Tywyn).

Childminder registrations have a high turnover compared to other types of childcare. During the last 2 years we have had 19 new childminders register with CSSIW, but during this time 30 childminders have cancelled their registration, giving us a net loss of 11 childminders.

The majority of childminders offer the full range of services, however only 46% offer a wrap-around service, and only 1 childminder noted that she offered a weekend / late night after 6pm service to parents.

Across the county childminders offer a flexible service to parents, with 61% of children attending on a part time or ad-hoc basis. Childminders across the county are able to accommodate the needs of working parents, with 23% starting work before 7:30am, 43% by 8:00am, and 8% by 8:30am. 26% of childminders did not answer this part of the SASS return.

There are fewer places available during the school holidays, maximum capacity is 652 places during term time, and only 414 places during the holidays. There is limited attendance during the Christmas holiday period, which may be reflection that many childminders are closed during this time, or that there is a lack of demand.
There is a marked decrease in the number of children attending during the school holidays across all age groups, except for those under 12 months of age.

Only 7 children with additional learning needs or a disability attend a childminder setting, however the vast majority do state on their FIS forms that they would be willing to care for a child with additional learning needs or a disability.

There is a good supply of Welsh language provision across most of the county, with 23% of childminders stating that they are a Welsh Language setting, 62% stating that they are Welsh and English, and only 15% stating that they are either English or English with some bilingual elements settings.

33% of childminding provision in Area 2 (Bangor) is English Language, and Area 8 (Tywyn) has only English language or English with some bilingual provision.

Language of Childminder Provision

- Welsh Language — 23%
- Welsh & English — 62%
- English or English with some bilingual elements — 15%
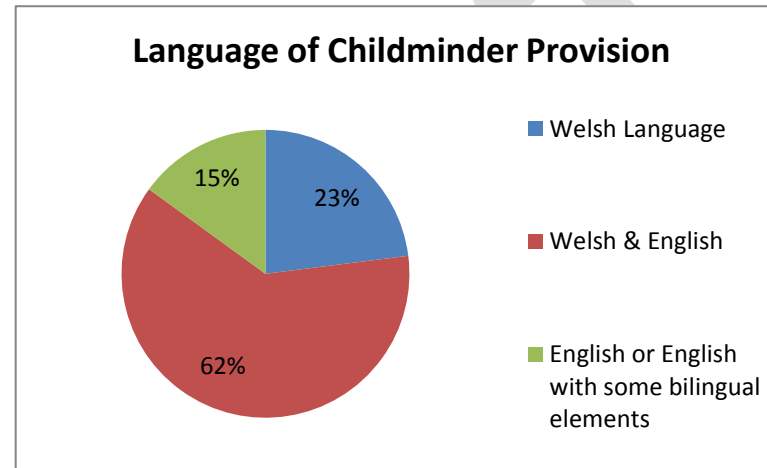
Only childminders in Areas 2, 3 and 5 reported that they had a waiting list, either during school term time or school holidays or both.

The vast majority of childminders care for children aged between 12 months and 7 years of age, with fewer caring for children aged under 12 months and over 8 years.

Only 2 childminders stated that they care for children aged 12 – 14 years, and none stated that they care for children aged 15 – 17 years, this may well be due to a lack of demand, as most childminders are willing to accommodate older children if required.

There is a vast range of charges for full day provision across the whole county, with the lowest rate of £22.50 in Area 2 (Caernarfon) and the highest rate of £45 in Area 4 (Porthmadog).

40% of childminders charge between £30 - £35 for full day care, and 12% charge between £36 - £45 for full day care.
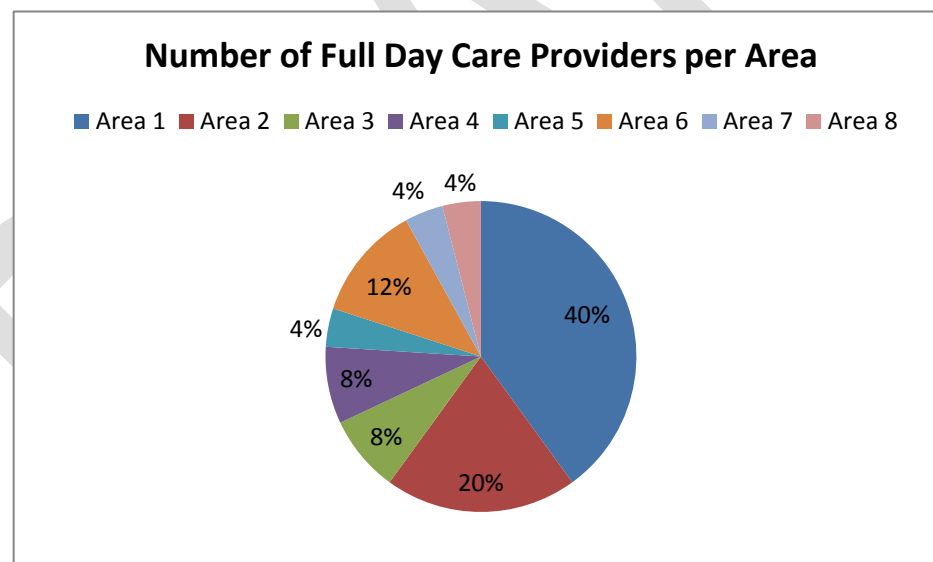
6.2 Full Day Care

Analysis of Supply of Childcare Provision

In Gwynedd we have a total of 20 full day care nurseries providing a total of 919 registered places. In addition to these full day care nurseries, other settings are registered as full day care but provide a range of sessional sessions throughout the day, or are only open during school term time.

During the last 2 years we have had 2 new full day nurseries register, one in Area 4 (Porthmadog) and one in Area 8 (Tywyn) but 2 full day nurseries have also closed during this time, both in Area 1 (Bangor).

25 full day care providers completed the online SASS return in 2016.

The chart below shows that there is not an even distribution of full day care providers across the County, with a significant reduction in the numbers in the areas to the south.

Number of Full Day Care Providers per Area

Legend: Area 1, Area 2, Area 3, Area 4, Area 5, Area 6, Area 7, Area 8

- Area 1: 40%
- Area 2: 20%
- Area 3: 8%
- Area 4: 8%
- Area 5: 4%
- Area 6: 12%
- Area 7: 4%
- Area 8: 4%

Source: CSSIW SASS Data 2016

Range of services provided

The table below shows the range of services offered by full day care providers in each of the areas.

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Total Full Day Care	10	5	2	2	1	3	1	1
Full Day Nursery	7	4	1	2	1	3	1	1
Half Day Nursery (am)	5	3	1	1	1	2	1	
Half Day Nursery (pm)	6	3	1	1	1	2	1	
Cylch Meithrin / Playgroup (am)	2	1	1		1	2		
Cylch Meithrin / Playgroup (pm)		1	1		1	2		
Before School	2	1		1	1		1	
After School	4	2	1	2	1	2	1	1
Wrap Around	2	3	2		1	2	1	
Lunch	4	1	1		1	3	1	
Holiday Provision	3	2	1	1	1	3	1	1
Crèche	1		1		1	1		

Source: CSSIW SASS Data 2016

20 settings offer full day nursery provision, 14 offer after school provision, 13 have holiday provision but only 11 offer a wrap- around and lunch service. 4 settings offer crèche provision.

There is only Full Day Nursery, after school and holiday provision in Area 8 (Tywyn).

Number and type of child places filled (full time, part time, ad-hoc)
Term Time

The table below shows the maximum number of places available during school term time.

Full Day Nursery	744
Half Day Nursery (am)	202
Half Day Nursery (pm)	241
Cylch Meithrin / Playgroup (am)	86
Cylch Meithrin / Playgroup (pm)	72
Before School	59
After School	220
Wrap Around	24
Lunch	68
Crèche	50
Total Maximum Capacity	**1766**

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled according to the type of service.

	Full Time	Part Time	Ad-hoc
Full Day Nursery	219	393	22
Half Day Nursery (am)	26	71	2
Half Day Nursery (pm)	24	72	1
Cylch Meithrin / Playgroup (am)	15	38	17
Cylch Meithrin / Playgroup (pm)	22	15	18
Before School	22	14	4
After School	30	96	3
Wrap Around	0	23	22
Lunch	3	71	0
Crèche	0	15	14
Total Number of Children Attending	**361**	**808**	**103**

Source: CSSIW SASS Data 2016

On average, 28% of children attend a full day care setting on a full time basis, 64% attend on a part time basis, with 8% attending ad-hoc sessions.
The numbers vary slightly across the different services;
- 55% of children attend before school on a full time basis
- 23% of children attend after school on a full time basis
- no children attend wrap-around provision full time

Across the county there is a large variation in the percentage of children who attend a full day care setting on a full time basis:

Area 1 - 40%; Area 2 – 16%; Area 3 – 10%; Area 4 – 7%; Area 5 – 10%; Area 6 – 53%; Area 7 – 19%; Area 8 - 0%

School Holiday

According to the CSSIW SASS data, there are a total of 781 places available during school holidays.

The table below shows the number of places available in each area.

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Maximum capacity during school holidays	338	173	29	78	43	89	31	None noted

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled during each holiday.

	Full Time	Part Time	Ad-hoc	Total
Summer Holiday	103	406	51	560
October Half Term	67	394	27	488
Christmas Holiday	38	280	17	335
February Half Term	68	385	21	474
Easter Holiday	72	366	22	460
May Half Term	56	412	23	491
Total Number of Children Attending	**404**	**2243**	**161**	**2808**

Source: CSSIW SASS Data 2016

Only 14% of children attend a full day care setting on a full time basis during school holidays, 80% attend on a part time basis and 6% attend ad-hoc sessions.

Attendance is highest during the summer holidays, with attendance during the half-term and Easter holidays being very similar, attendance is lower during the Christmas holiday period.

The numbers vary slightly in different areas, but the picture is very similar across the whole County, with the highest percentage of children attending on a part time basis.

Number of places filled by children who have additional learning needs or who require specialist care due to a disability

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Total number of children with additional learning needs or disability	9	9	3	1	6	10	0	0
Number of children with statements or awaiting formal assessment								
Speech, language and communication difficulties	5	5	2		2	2		
Specific learning (e.g. dyslexia, ADHD, Dyspraxia)	1	1		1		4		
Hearing difficulties			1			2		
Learning difficulties (e.g. global development delay etc.)		1						
Visual difficulties		1						
Emotional and behavioural difficulties	1	1	1		2			
Physical		1			2	1		
Medical condition - eczema	1					1		
Medical condition - diabetes		1						
Medical condition – turner syndrome		1						
Medical condition - epilepsy						1		
Medical condition – autistic spectrum	1							

Source: CSSIW SASS Data 2016

There are 38 children with additional learning needs, or who require specialist care due to a disability being cared for in full day care settings across most of the county. No full day care settings in Areas 7 and 8 noted that they cared for any child with additional learning needs or disability.

Number of Welsh Language places filled

Of the 25 full day care settings who completed the CSSIW SASS return, 10 stated that their service was Welsh language, 14 Welsh and English (bilingual) and 1 English with some bilingual elements.

The table below shows the number of full day care settings according to the language of their provision, in each area:

Language of Provision	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Welsh	2	3	1	1	1	1	1	
Welsh & English	8	2	1	1		1		1
English								
English & some bilingual elements						1		

Source: CSSIW SASS Data 2016

96% of full day care provision in Gwynedd is either through the medium of Welsh or Bilingual, only 4% is delivered in English with some bilingual elements.
There is no English only full day care provision in Gwynedd.

The table below shows the total number of childcare places available according to the language of the provision:

Number of places available	Welsh	Welsh & English	English & some bilingual elements	English
Term time	656	905	205	
School Holidays	313	427	41	

Source: CSSIW SASS Data 2016

Vacancies and Waiting Lists

The number of vacancies recorded in the CSSIW SASS data is inconsistent as settings have used different methods of calculation – this data cannot therefore be taken in to account as a true reflection of the number of vacancies. Some settings have also recorded a waiting list and vacancy for the same service.

The table below shows the number of full day care settings with a waiting list during school term time, per area, according to the language of their provision.

	Language of Provision							
	Welsh		Welsh & English		English & some bilingual elements		English	
	Area 1	Area 4	Area 1	Area 4	Area 1	Area 4	Area 1	Area 4
Spring Term								
Full Day Nursery			8					
Summer Term								
Full Day Nursery			5	3				
After School				2				
Playgroup/Cylch Meithrin (am)				1				
Autumn Term								
Full Day Nursery			6	1				

Source: CSSIW SASS Data 2016

Only settings in Areas 1 and 4 reported that they had a waiting list, 73% were in Area 1 (Bangor) for full day nursery provision. No settings noted that they had a waiting list during school holidays.

Opening Times

The CSSIW SASS data shows a wide range of different opening and closing times for full day care providers across Gwynedd during term time.

The table below summarises the data according to the language of the provision:

Language	Start	Finish	Number of settings
Welsh	07:30	18:00	2
	07:45	18:00	1
	07:50	17:30	1
	08:00	17:30	1
	08:45	15:15	1
	09:00	15:10	1
	09:15	15:00	1
	09:15	15:30	1
Welsh & English	07:00	18:00	2
	07:30	18:00	3
	07:35	17:55	1
	08:00	18:00	5
	08:30	17:30	1
English & some bilingual elements	08:00	No finish time noted	1

Source: CSSIW SASS Data 2016

3 settings did not give an answer to this part of the SASS return.

16 settings are open by 8am each day, with 7 of these open before 7:30am. No settings are open after 6pm.

The sessional settings which are registered as full day care are open for fewer hours each day compared to the full day nurseries.

Only one full day nursery in Area 4 (Porthmadog) noted that they were open on a Saturday.

The data for the opening hours during school holidays was incomplete. For those that had completed this section, opening hours for full day nurseries were the same as during term time, and they were open during all school holidays except for 2 who noted that they were closed during the Christmas holiday period.

Age Range of Children

The table below shows the range of ages of children that full day care settings can accommodate:

Age Range	Number of Full Day Care Settings							
	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Under 12 months	7	4	1	2	1	2	1	1
12 – 18 months	7	4	1	2	1	2	1	1
19 – 23 months	7	4	1	2	1	2	1	1
2 years	10	5	2	2	1	3	1	1
3 years	10	5	2	2	1	3	1	1
4 years	9	5	2	2	1	3	1	1
5 – 7 years	6	2	1	2	1	2	1	1
8 – 11 years	5	2	0	1	0	1	1	1
12 – 14 years	0	0	0	0	0	0	0	0
15 – 17 years	0	0	0	0	0	0	0	0

Source: CSSIW SASS Data 2016

The majority of full day care settings care for children from under 12 months of age, with numbers decreasing after the 5-7 years age group. No settings noted that they care for children above 11 years of age.

The chart below shows the number of children attending a full day care setting during school term time and during the holidays, it must however be noted that the data for school holidays was incomplete.
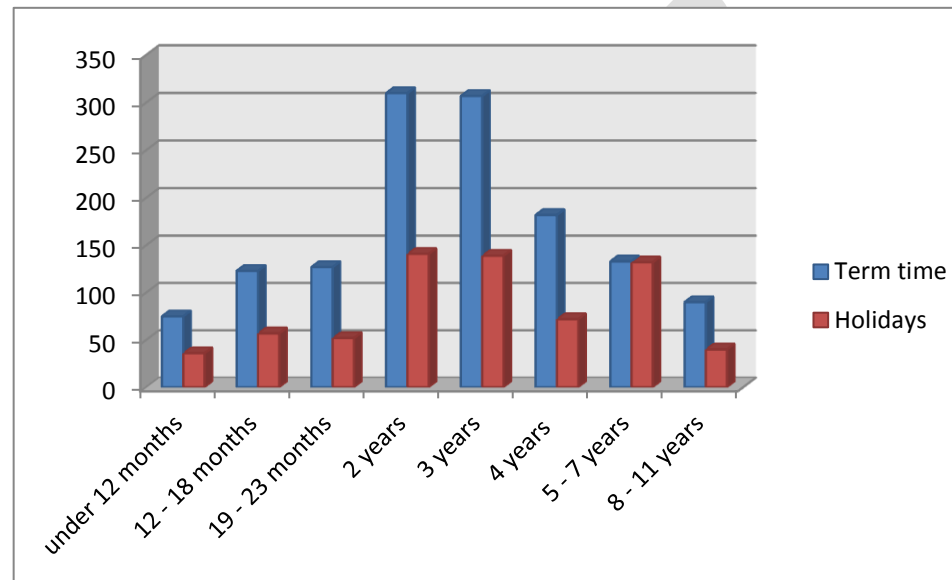
Source: CSSIW SASS Data 2016

Some of the sessional settings that are registered as full day care only accept children aged from 2 – 4 years, this therefore explains the increased number of children attending during school term time in this age group.
There is a marked decrease in the number of children aged 8 – 11 years attending full day care settings, which could be a reflection on decreased demand or fewer settings which accommodate children of this age.

Range of Charges

It is extremely difficult to analyse the range of charges as some settings have completed this section using their hourly rate others have used their daily rate, and some have used their session rate. Some settings did not complete this section.

With no indication of the hours covered it is very difficult to summarise the true cost for each session, however the table below shows the range of fees for each service they provided, as completed in the CSSIW SASS return.

	Range of Costs per Service Provided		
	Welsh	Welsh & English	English & some bilingual elements
Full Day Nursery	£3.60 - £4.18/hr £22 - £37	£3.66 - £3.88/hr £34.50 - £41	£4.76/hr
Half Day Nursery (am)	£3.70 - £5.27/hr £24	£4.40 – £5.55/hr £20 - £28	£4.76/hr
Half Day Nursery (pm)	£3.90 - £5.80/hr £24	£4.00 - £5.55/hr £12 - £28	£4.76/hr
Cylch Meithrin/Playgroup(am)	£2.00 - £7.00	£7.50	
Cylch Meithrin/Playgroup(pm)	£2.00 - £7.00		
Before School	£3.80 - £5.00	£2.85 - £7.50	
After School	£3.00 - £9.00	£2.75 - £14	£4.96/hr
Wrap Around	£4.00 - £17.00		
Crèche	£4.00	£10.00	£4.96/hr
Lunch	£2.00 - £8.00		£1.20
Holiday Provision (am)		£5.55/hr £10 - £35	£4.76/hr
Holiday Provision (pm)		£5.55/hr £10 - £28	£4.76/hr
Other		£2.00 - £29	

Source: CSSIW SASS Data 2016

The lowest full day care rate of £22 is in Area 3 (Llŷn), and the highest full day care rate of £41 is in Area 1 (Bangor).

4 full day care settings stated that they charge an additional cost for meals, snacks, nappies, transport and outings. These settings were in Area 1 and 2 only.

10 full day care settings stated that they offer a discount for siblings, this varied from a 5% - 15% discount.

15 full day care settings stated that they do not offer a discount for siblings.

Summary of key strengths and weaknesses

There is not an even distribution of full day care providers across the county, the highest numbers are in Area 1 (Bangor) and Area 2 (Caernarfon), which are also the areas with the highest population and employment opportunities.
There is limited choice of full day care provision in Area 3 (Llŷn), Area 5 (Ffestiniog) Area 6 (Dolgellau) Area 7 (Penllyn) and Area 8 (Tywyn).
However due to the rurality and lower levels of population in these areas, full day care provision may not be sustainable.

During the last 2 years we have had 2 new full day nurseries register, one in Area 4 (Porthmadog) and one in Area 8 (Tywyn) but 2 full day nurseries have also closed during this time, both in Area 1 (Bangor).

20 settings offer full day nursery provision, 14 offer after school provision, 13 have holiday provision but only 11 offer a wrap- around and lunch service.
There is only full day nursery, after school and holiday provision in Area 8 (Tywyn).

Across the county there is a large variation in the percentage of children who attend a full day care setting on a full time basis during term time:
Area 1 - 40%; Area 2 – 16%; Area 3 – 10%; Area 4 – 7%; Area 5 – 10%; Area 6 – 53%; Area 7 – 19%; Area 8 - 0%
Take up of childcare places is lower during the school holidays, and 80% attend on a part-time basis, this makes staffing and sustainability difficult for the settings.

Full day nurseries across the county are able to accommodate the needs of working parents with 16 settings opening by 8am each day, 7 of these open before 7:30am. 13 settings are open until 6pm.
The sessional settings which are registered as full day care are open for fewer hours each day compared to the full day nurseries.
Only one full day nursery in Area 4 (Porthmadog) noted that they were open on a Saturday.

Provision for children with additional learning needs or a disability is good. 38 children with a range of different needs were accessing full day care provision across most of the county, however no settings in Areas 7 and 8 noted that they cared for a child with additional learning needs or disability.

There is a good supply of Welsh language provision across the county, 96% of full day care provision is either through the medium of Welsh or Bilingual, only 4% is delivered in English with some bilingual elements.
There is no English only full day care provision in Gwynedd.

Only settings in Areas 1(Bangor) and 4 (Porthmadog) reported that they had a waiting list during term time, 73% were in Area 1 for full day nursery provision.
No settings noted that they had a waiting list during school holidays.

The majority of full day care settings across the county accommodate children from 0 - 7 years of age, no settings noted that they care for children above 11 years of age.

There is a vast range of charges for full day nursery provision across the whole county, with the lowest rate of £22 in Area 3 (Llŷn), and the highest rate of £41 in Area 1 (Bangor).
48% of settings charge between £35 - £41 for full day nursery provision.
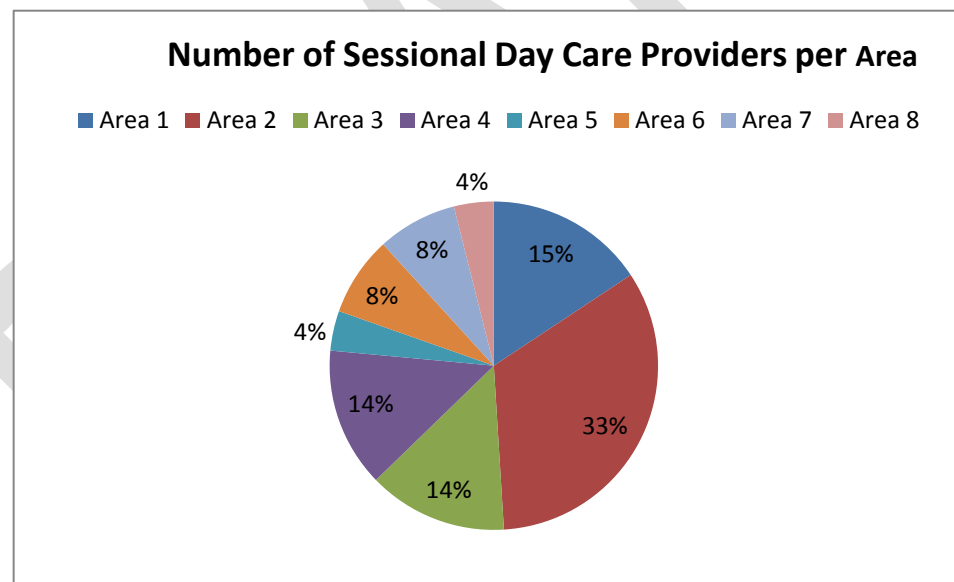
6.3 Sessional Day Care

Analysis of Supply of Childcare Provision

In Gwynedd we have a total of 65 registered sessional day care settings providing a total of 1929 registered places, and a further 2 unregistered sessional settings providing a further 28 places.
During the last 2 years, 2 registered sessional care settings have closed, one in Area 1(Bangor) and one in Area 3(Llŷn) and 1 new setting has opened in Area 8(Tywyn).

Of these 65 registered sessional care settings, only 51 completed the online SASS return in 2016.

The chart below shows that there is not an even distribution of sessional care settings across the County, with a significant reduction in the numbers in the areas to the south:

Number of Sessional Day Care Providers per Area

■ Area 1 ■ Area 2 ■ Area 3 ■ Area 4 ■ Area 5 ■ Area 6 ■ Area 7 ■ Area 8

Source: CSSIW SASS Data 2016

Range of services provided

The table below shows the range of services offered by sessional day care providers in each of the areas:

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Total Sessional Day Care	8	17	7	7	2	4	4	2
Cylch Meithrin / Playgroup (am)	6	15	7	6	2	4	3	2
Cylch Meithrin / Playgroup (pm)	2	4		1	1	1	2	1
Lunch	1	9		3		2		1
Wrap Around	2	4		1	1	1		
Other	1							

Source: CSSIW SASS Data 2016

88% of settings offer morning sessions and only 24% offer afternoon sessions. Only 31% offer a lunch service and 18% offer wrap around care.
There is no lunch or wrap around care in Area 3 (Llŷn) or Area 7 (Bala).

Number and type of child places filled (full time, part time, ad-hoc)
Term time
The table below shows the maximum number of places available during school term time:

Cylch Meithrin / Playgroup (am)	855
Cylch Meithrin / Playgroup (pm)	354
Lunch	224
Wrap Around	76
Other	11
Total Maximum Capacity	**1520**

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled according to the type of service:

	Full Time	Part Time	Ad-hoc
Cylch Meithrin / Playgroup (am)	359	479	15
Cylch Meithrin / Playgroup (pm)	145	167	2
Lunch	23	115	0
Wrap Around	35	34	0
Other	3	22	0
Total Number of Children Attending	**565**	**817**	**17**

Source: CSSIW SASS Data 2016

On average,40% of children attend a sessional setting on a full time basis, 59% attend on a part time basis and only 1% attend ad-hoc.
The numbers vary across the services, with only 17% of children attending lunch provision on a full time basis but 51% attending wrap around provision full time.
Across the county there is a large variation in the percentage of children who attend a sessional day care setting on a full time basis:
    Area 1 - 23%; Area 2 – 51%; Area 3 – 23%; Area 4 – 20%; Area 5 – 33%; Area 6 – 48%; Area 7 – 83%; Area 8 - 18%

School Holidays

According to the CSSIW SASS data, there are a total of 96 places available during school holidays.

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Maximum capacity during school holidays	12	64	0	0	0	0	0	20

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled during each holiday:

	Full Time	Part Time	Ad-hoc	Total
Summer Holiday	57	23	2	82
October Half Term	67	9	1	77
Christmas Holiday	41	9	1	51
February Half Term	87	9	1	97
Easter Holiday	41	9	1	51
May Half Term	92	9	1	102
Total Number of Children Attending	**385**	**68**	**7**	**460**

Source: CSSIW SASS Data 2016

It must be noted that some settings had not completed the section noting their maximum capacity, but had completed the section with the number of places filled, it is therefore difficult to get a full picture of the places available and used for the school holidays.

84% of children attend a sessional day care setting on a full time basis during school holidays, 15% attend on a part time basis and 1% attend ad-hoc sessions.

Number of places filled by children who have additional learning needs or who require specialist care due to a disability

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Total number of children with additional learning needs or disability	17	35	1	2	1	6	4	3
Number of children with statements or awaiting formal assessment								
Speech, language and communication difficulties	4	15	1	2	1	3	3	1
Specific learning (e.g. dyslexia, ADHD, Dyspraxia)	3	1						1
Hearing difficulties	2	1						
Learning difficulties (e.g. global development delay etc.)		7		1		2	1	
Visual difficulties		1						
Emotional and behavioural difficulties	2	8				1	1	
Physical		1						1
Medical condition – colostomy bag	1							
Medical condition – allergies		1						
Medical condition – hypermobility		1						
Medical condition - epilepsy		1						
Medical condition – PHACE syndrome								1
Other – autistic spectrum		1						

Source: CSSIW SASS Data 2016

There were 69 children with additional learning needs, or who require specialist care due to a disability being cared for in sessional day care settings. Numbers vary greatly across the county with 75% of the children in Area 1 (Bangor) and Area 2 (Caernarfon).

Number of Welsh language places filled

Of the 51 sessional day care settings who completed the CSSIW SASS return, 43 stated that their service was Welsh language, 7 Welsh and English (bilingual) and 1 English language.

The table below shows the number of sessional day care settings according to the language of their provision, in each area:

Language of Provision	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Welsh	6	15	6	6	1	4	4	1
Welsh & English	2	2	1	1	1			
English								1

Source: CSSIW SASS Data 2016

84% of sessional day care provision in Gwynedd is Welsh language, 14% is Welsh and English with only 2% delivered in English. Area 6 (Dolgellau) and Area 7 (Penllyn) only have Welsh language provision, and Area 8 (Tywyn) is the only area in the county with English language sessional day care provision.

The table below shows the total number of childcare places available according to the language of the provision:

Number of places available	Welsh	Welsh & English	English
Term time	1235	237	48
School Holidays	84	12	0

Source: CSSIW SASS Data 2016

Vacancies and Waiting Lists

The number of vacancies recorded in the CSSIW SASS data is inconsistent as settings have used different methods of calculation – this data cannot therefore be taken in to account as a true reflection of the number of vacancies. Some settings have also recorded that they have a waiting list for the same service for which that they have recorded a vacancy.

The table below shows the number of sessional day care settings with a waiting list during school term time, per area, according to the language of their provision:

	Language of Provision								
	Welsh				Welsh & English				English
	Area 1	Area 2	Area 3	Area 4	Area 1	Area 2	Area 3	Area 4	Area 8
Spring Term									
Morning Playgroup/ Cylch Meithrin		1							3
Afternoon Playgroup/ Cylch Meithrin									4
Summer Term									
Morning Playgroup/ Cylch Meithrin		11		5			14		5
Autumn Term									
Morning Playgroup/ Cylch Meithrin		3							12
Afternoon Playgroup/ Cylch Meithrin									6

Settings in Area 2, 3, 4 and 8 reported that they had a waiting list, 47% were for English language provision in Area 8 (Tywyn), 55% were for morning sessions in the summer term.

No settings noted that they had a waiting list during school holidays.

Opening Times

The CSSIW SASS data shows a vast range of different opening and closing times for sessional day care providers across Gwynedd during term time.

The table below summarises the data according to the language of the provision:

Language	Start	Finish	Number of settings
Welsh	08:40	11:10	1
	08:40	11:40	1
	08:45	10:55	1
	08:45	11:15	3
	08:50	11:00	1
	08:50	12:50	1
	08:55	11:00	1
	09:00	13:00	2
	09:00	11:00	5
	09:00	11:30	10
	09:00	11:40	1
	09:00	13:00	1
	09:10	11:40	1
	09:15	11:45	3
	11:00	13:00	4
	11:15	12:15	1
	11:15	13:00	1
	11:15	15:00	1
	11:30	14:55	1
	12:00	14:30	1
	12:00	14:50	1
	12:15	14:45	1
	12:15	15:00	1
	12:30	15:00	4
	12:45	14:50	1
	12:45	15:15	1
	12:50	15:00	1
	13:00	15:00	2
	13:15	15:45	1
	13:30	15:30	1

Welsh & English	09:00	11:30	3
	09:00	12:00	1
	09:10	11:40	1
	11:00	14:55	1
	11:30	12:55	1
	11:30	13:00	1
	12:15	14:45	1
	12:30	14:55	1
	12:30	15:00	1
English & some bilingual elements	09:00	13:00	1
	13:00	15:00	1

Source: CSSIW SASS Data 2016

No settings are open before 8:40am, with the majority of morning sessions starting between 8:45am and 9:15 am.
3:45pm is the latest closing time.
No sessional day care settings are open on weekends.

It has not been possible to analyse the opening times during school holidays due to irregularities in the SASS data.

Age Range of Children

The table below shows the range of ages of children that sessional day care settings can accommodate.

Age Range	Number of Sessional Day Care Settings							
	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Under 12 months	0	0	0	0	0	0	0	0
12 – 18 months	0	1	0	0	0	0	0	0
19 – 23 months	0	1	0	0	0	0	0	0
2 years	8	16	7	7	2	4	4	2
3 years	8	17	7	7	2	4	4	2
4 years	6	14	4	5	2	4	4	2
5 – 7 years	0	0	0	0	0	0	0	0
8 – 11 years	0	0	0	0	0	0	0	0
12 – 14 years	0	0	0	0	0	0	0	0
15 – 17 years	0	0	0	0	0	0	0	0

Source: CSSIW SASS Data 2016

The vast majority of sessional day care settings care for children from 2 – 4 years of age, only one setting noted that they care for children from 12 – 23 months of age.
No settings care for children above 5 years of age.

The chart below shows the number of children attending sessional day care setting during school term time and during the holidays, it must however be noted that the data for school holidays was incomplete.
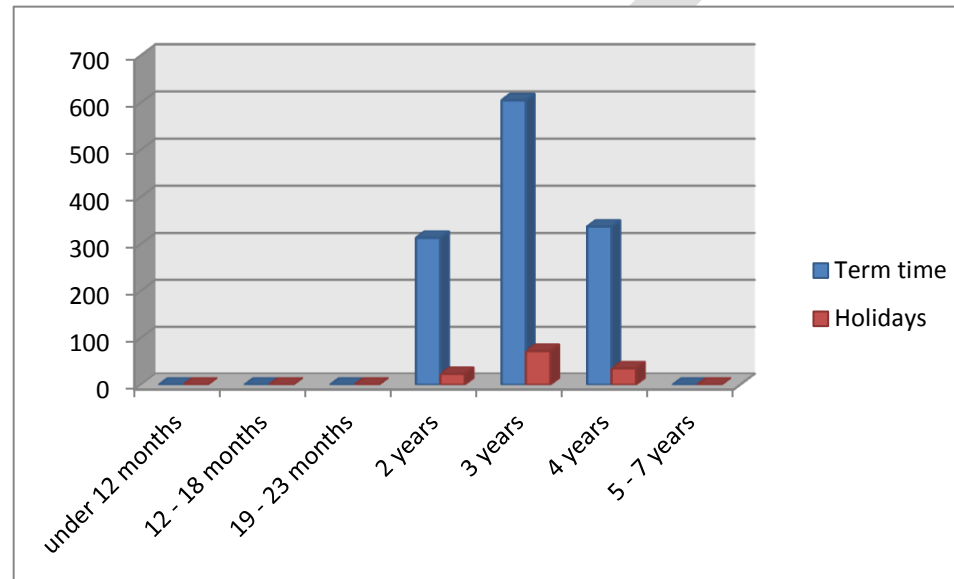
There is a marked increase in the number of 3 year olds attending sessional care settings, this is probably due to the fact that 63 of the 65 registered settings are contracted to deliver 10 hours of free Early Years Education to children the term after their 3rd birthday.

Range of Charges

It is extremely difficult to analyse the range of charges as some settings have completed this section using their hourly rate whilst others appear to have used their session rate. Some settings did not complete this section.

With no indication of the hours covered it is very difficult to summarise the true cost for each session, however the table below shows the range of fees for each service they provided, as completed in the CSSIW SASS return.

	Range of Costs per Service Provided		
	Welsh	Welsh & English	English
Cylch Meithrin/Playgroup (am)	£1.38 - £8.40	£2.00 - £5.00	£10.00
Cylch Meithrin/Playgroup (pm)	£1.00 - £10.00	£3.50 - £6.00	£5.00
Lunch	£2.00 - £6.00	£3.66 - £6.50	
Wrap Around	£2.40 - £4.00	£6.50 - £10.00	
Other	£1.00 - £2.50	£7.00	

Source: CSSIW SASS Data 2016

2 sessional day care settings stated that they charge an additional cost for meals, snacks, nappies, transport and outings, 1 setting is in Area 6 (Dolgellau) and the other in Area 8 (Tywyn).

4 settings stated that they offer a discount for siblings, two of these were for twins only. 47 settings stated that they offer no discount for siblings.

Summary of key strengths and weaknesses

There is not an even distribution of sessional day care providers across the county, the highest numbers are in Area 1 (Bangor) Area 2 (Caernarfon), Area 3 (Llŷn) and Area 4 (Porthmadog).

During the last 2 years, 2 registered sessional care settings have closed, one in Area 1(Bangor) and one in Area 3(Llŷn) and 1 new setting has opened in Area 8(Tywyn).

The range of services offered is limited when compared to other types of childcare providers, and a high proportion only offer morning sessions - 88% of settings offer morning sessions and only 24% offer afternoon sessions. Only 31% offer a lunch service and 18% offer wrap around care.
There is no lunch or wrap around care in Area 3 (Llŷn) or Area 7 (Bala).

Across the county there is a large variation in the percentage of children who attend a sessional day care setting on a full time basis:
Area 1 - 23%; Area 2 – 51%; Area 3 – 23%; Area 4 – 20%; Area 5 – 33%; Area 6 – 48%; Area 7 – 83%; Area 8 - 18%
The numbers also vary across the services, with only 17% of children attending lunch provision on a full time basis but 51% attending wrap around provision full time.

Sessional day care does not meet the needs of most working parents as no settings are open before 8:40am, with the majority of morning sessions starting between 8:45am and 9:15 am, and 3:45pm is the latest closing time.
No sessional day care settings are open on weekends.

Provision for children with additional learning needs or a disability is very good. 69 children with a range of different needs were being cared for in sessional day care settings across the county, but numbers vary greatly across the county with 75% of the children in Area 1 (Bangor) and Area 2 (Caernarfon).

There is a good supply of Welsh language provision across the county, 98% of sessional day care provision is either through the medium of Welsh or bilingual, only 2% is delivered in English.

Settings in Area 2, 3, 4 and 8 reported that they had a waiting list, 47% were for English language provision in Area 8 (Tywyn), 55% were for morning sessions during the summer term.

6.4 Crèches

Analysis of Supply of Childcare Provision

There are no stand alone registered crèche settings in the county, however 4 full day care providers noted that they offer a crèche service.

The local authority nursery and Barnardo's nursery offer mobile crèche facilities to support Families First and Flying Start parenting programmes. The number of children attending depends on the size of the room and the age of the children attending.

Summary of key strengths and weaknesses

The availability of mobile crèche facilities ensures high quality childcare to support Families First and Flying Start programmes.

Demand is high and not all courses can be catered for, increased provision in Flying Start areas could meet those needs.

Families First and Flying Start need to procure crèche services out of county due to the high demand at times. This is a weakness and there is a need to develop further local crèche facilities to accommodate the programmes.

6.5 Out of School Care

Analysis of Supply of Childcare Provision

In Gwynedd we have a total of 29 registered out of school clubs providing a total of 725 registered places, and a further 10 unregistered out of school clubs providing a further 208 places.

Of the 29 registered out of school clubs, 12 are within day nursery settings and their details can be found in section 6.2.

The other 17 registered clubs are a mixture of private provider and voluntary run committee, 5 new out of school clubs have opened in the last 2 years in areas across the county, however 2 out of school clubs have closed, both of these were in Area 1 (Bangor)

Of these 17 registered out of school clubs, only 9 completed the online SASS return in 2016, 2 of these were located in Area 1 (Bangor) and 7 located in Area 2 (Caernarfon). This data does not therefore give us an accurate picture of the out of school provision in the county.

Range of services provided

The table shows the range of services offered by out of school clubs in each area:

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Total Out of School Care Providers	2	7	0	0	0	0	0	0
Before School		1						
After School	1	7						
Holiday Provision	1	2						
Playscheme sessions	1							

Source: CSSIW SASS Data 2016

Number and type of child places filled (full time, part time, ad-hoc)
Term time
The table below shows the maximum number of places available during school term time:

Before School	14
After School	204
Playscheme sessions	16
Total Maximum Capacity	**234**

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled according to the type of service:

	Full Time	Part Time	Ad-hoc
Before School	1	13	0
After School	15	225	27
Playscheme sessions			
Total Number of Children Attending	**16**	**238**	**27**

Source: CSSIW SASS Data 2016

95% of children attend after school sessions, and 84% of these attend on a part time basis.

School Holidays

According to the CSSIW SASS data, there are a total of 112 places available during school holidays:

	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Maximum capacity during school holidays	56	56	0	0	0	0	0	0

Source: CSSIW SASS Data 2016

The table below shows the number of childcare places filled during each holiday:

	Full Time	Part Time	Ad-hoc	Total
Summer Holiday	21	42	24	87
October Half Term	19	27	5	51
Christmas Holiday	2	23	0	25
February Half Term	21	33	1	55
Easter Holiday	22	41	16	79
May Half Term	19	40	3	62
Total Number of Children Attending	**104**	**206**	**49**	**359**

Source: CSSIW SASS Data 2016

29% of children attend an out of school care setting on a full time basis during school holidays, 58% attend on a part time basis and 13% attend ad-hoc sessions.

Number of places filled by children who have additional learning needs or who require specialist care due to a disability

According to the SASS data 2 children with additional learning needs or who require specialist care due to a disability were being cared for in an out of school childcare provision in Area 2 (Caernarfon), one had visual difficulties and the other with autistic spectrum disorder.

We are however aware of 3 children attending out of school provision at the time, who were being funded for Extra Hands support via the Out of School Childcare Grant.

Number of Welsh language places filled

Of the 9 out of school care settings who completed the CSSIW SASS return, 6 stated that their service was Welsh language and 3 were Welsh & English.

The table below shows the total number of childcare places available according to the language of the provision:

Number of places available	Welsh	Welsh & English
Term time	180	54
School Holidays	96	16

Source: CSSIW SASS Data 2016

Vacancies and Waiting Lists

The number of vacancies recorded in the CSSIW SASS data is inconsistent as settings have used different methods of calculation – this data cannot therefore be taken in to account as a true reflection of the number of vacancies. Some settings have also recorded that they have a waiting list for the same service for which that they have recorded a vacancy.

The table below shows the number of out of school care settings with a waiting list during school term time, per area, according to the language of their provision:

	Language of Provision	
	Welsh	
	Area 1	Area 2
Spring Term		
After School		21
Summer Term		
After School		21
Autumn Term		
After School		25

Only Welsh language settings in Area 2 (Caernarfon) reported that they had a waiting list, and this was for after school care only.

No settings noted that they had a waiting list during school holidays.

Opening Times

The CSSIW SASS data shows a range of different opening and closing times for out of school care providers across Gwynedd.
The table below summarises the data according to the language of the provision during term time:

Language	Start	Finish	Number of settings
Welsh	07:30	09:00	1
	11:00	13:00	1
	15:00	17:30	2
	15:00	17:45	2
	15:00	18:00	2
Welsh & English	15:00	18:00	2

Source: CSSIW SASS Data 2016

The table below summarises the data during school holidays:

Language	Start	Finish	Number of settings
Welsh	07:30	13:00	1
	08:00	18:00	1
	08:30	13:00	1
	13:00	17:30	1
	13:00	18:00	1
Welsh & English	09:00	17:00	1

Source: CSSIW SASS Data 2016

One setting in Area 2 (Caernarfon) opens at 7:30am – 9am and 3pm – 6pm during term time, 7:30am – 1pm and 1pm – 6pm during school holidays.
No out of school care settings are open after 6pm or on weekends.

Age Range of Children

The table below shows the range of ages of children that out of school care settings can accommodate:

Age Range	Number of Out of School Care Settings	
	Area 1	Area 2
3 years	1	3
4 years	1	7
5 – 7 years	1	7
8 – 11 years	2	7

Source: CSSIW SASS Data 2016

All the out of school care settings care for children from 3 – 11years of age, which reflects the primary school age.

The chart below shows the number of children attending out of school provision during school term time and during the holidays.
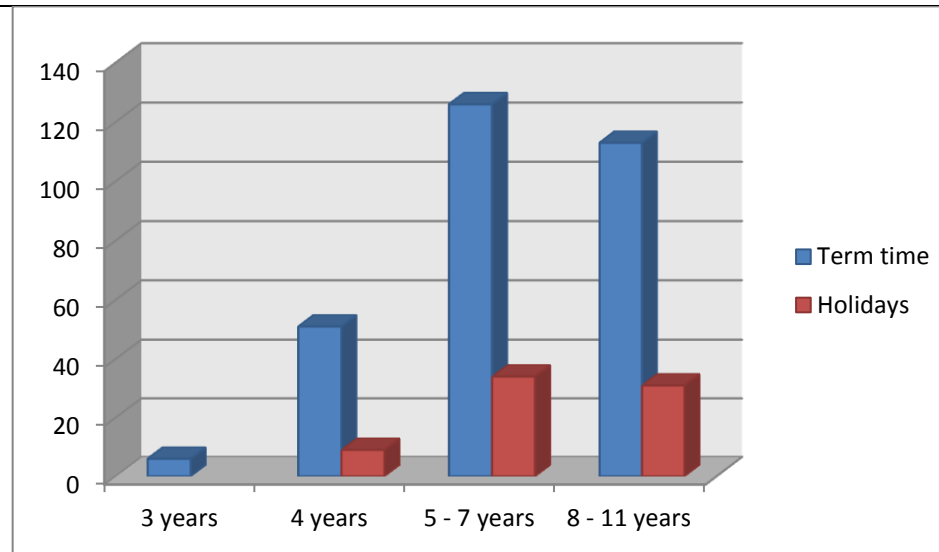
Source: CSSIW SASS Data 2016

Range of Charges

It is extremely difficult to analyse the range of charges as some settings have completed this section using their hourly rate whilst others appear to have used their session rate. Some settings did not complete this section.

With no indication of the hours covered it is very difficult to summarise the true cost for each session, however the table below shows the range of fees for each service they provided, as completed in the CSSIW SASS return.

	Before School	After School	Holiday Provision	Playscheme sessions
Welsh	£5.00	£2.18 - £15.00	£2.22 - £37.00	
Welsh & English		£7.50 - £10.50		£2.25

One setting in Area 2 (Caernarfon) stated that they charge an additional cost for meals, snacks, nappies, transport and outings.
One setting in Area 2 (Caernarfon) stated that they offer a sibling discount of 'Pay for 2 siblings and the 3rd is free'.

Summary of key strengths and weaknesses

Out of School childcare includes before school, after school, wrap around, holiday provision and holiday playschemes.
All or some of these childcare services are also provided by full day care settings, sessional care settings and childminders, therefore in order to gain the complete picture of out of school provision the previous sections must also be taken into account.

As only 9 out of school settings completed the CSSIW SASS return in 2016 it is very difficult to analyse the true strengths and weaknesses of this sector.

We are aware of 17 registered out of school clubs and 10 clubs that are not registered. Their distribution across the county is not even, and as with the other types of childcare, the highest numbers are in Area 1 (Bangor) and Area 2 (Caernarfon).
There is only un-registered out of school care provision in Area 5 (Ffestiniog).

5 new out of school clubs have opened in the last 2 years in areas across the county, however 2 out of school clubs have closed, both of these were in Area 1 (Bangor).

The CSSIW SASS data showed that there is more provision available after school in comparison to holiday provision.
84% of children attend after school provision on a part time basis compared to 58% who attend part time during summer holidays.

No out of school care settings are open after 6pm or on weekends.

There is a good supply of Welsh language provision, with 100% of the settings who completed their SASS return stating that they are either Welsh language or Welsh & English.

Only Welsh language settings in Area 2 (Caernarfon) reported that they had a waiting list, and this was for after school care only.
No settings noted that they had a waiting list during school holidays.

Out of school care helps meet the needs of working parents by providing services before school, after school and during the holidays, many of the registered settings are based on primary school sites.

6.6 Open Access Play Provision

Analysis of Supply of Childcare Provision
There was no data for open access play provision in the SASS return. There are 3 registered holiday playschemes in Gwynedd which have been detailed in previous sections.

6.7 Nanny

Analysis of Supply of Childcare Provision

There was no data for Nannies in the SASS return.
To date we have not received details from CSSIW regarding those registered on the voluntary approval scheme.

We are aware of 3 nannies working within the county.

Summary of key strengths and weaknesses

We require further information regarding nannies working in the county, and need to encourage all existing nannies to register on the Voluntary Approval Scheme and advertise their services on Gwynedd-Ni (Family Information Service).

7. Understanding the Needs of Parents/ Carers

Overview of Consultation

Consultation with parents took place during November – December 2016, using an on-line questionnaire designed by Welsh Government for all Local Authorities to use, this was to ensure consistent data capture across Wales. Further details of the consultation can be found in Section 2.

A total of 347 surveys were completed, but many respondents did not answer every question.

Considering that there are 22,441 parents with dependant children in the county, the responses to the survey gives us limited information and isn't necessarily a true representation of the childcare needs of parents.

Responses to the survey were as follows:-

Status	Number
Parent/ Carer in work (not expecting a baby)	247
Parent/ Carer in education or training (not expecting a baby)	5
Parent/ Carer seeking work (not expecting a baby)	9
Parent/ Carer seeking education or training (not expecting a baby)	4
Expecting or on maternity/ paternity leave with first child	20
Adopting first child	0
Parent/ Carer expecting or on maternity/ paternity leave with additional children	43
Adopting or on adoption leave with additional children	0
Parent/ Carer not in work	19
Parent/ Carer not in education or training	0

Respondents by annual household income

Average Annual Household Income	Number
£0-£10,000	16
£10,001-£20,000	26
£20,001-£30,000	39
£30,001-£40,000	23
£40,001-£50,000	8
£50,001-£60,000	14
£60,001-£70,000	5
£70,000+ per annum	5
Prefer not to say	17

Respondents by Ethnic Group

Ethnic Group	Number
White	150
Mixed/ Multiple Ethnic Groups	3
Asian/ Asian British	0
Black/ African/ Caribbean/ Black British	0
Other Ethnic Group	1

Language of Respondents (primary language spoken at home)

Language	Number
Welsh only	68
English only	20
Bilingual	48
Other languages	2

Respondents' children by age group

Age	Number
Under 12 months	42
12-18 months	33
19-23 months	26
2 years	62
3 years	62
4 years	45
5-7 years	119
8-11 years	96
12-14 years	60
15-17 years	46

Respondents with children who have additional learning needs or disability

Additional learning needs/ Disability	Number
Speech and language	29
Specific learning (dyslexia)	12
Hearing difficulties	3
Learning difficulties	11
Visual difficulties	5
Emotional and behavioural difficulties	14
Physical	4
Medical condition	4
Other	5

7.1. Current Use of Childcare

Analysis of Current Use of Childcare Provision

Parents were asked about their current use of childcare both within the local authority area and outside the local authority, during school term time and school holidays.

As many parents had not included their postcode it has not been possible to break down the data into the 8 Areas as in previous sections.

Range of services being used

The table below shows the number of parents using each type of service within the local authority area during term time.

	Language of the childcare setting				
	Welsh	Welsh & English	English & some bilingual elements	English	TOTAL
Childminder	13	3	1	1	18
Nursery	13	9	0	1	22
Cylch Meithrin/ Playgroup (am)	18	1	0	0	19
Cylch Meithrin/ Playgroup (pm)	8	1	0	0	9
Part time Early Education in school	3	0	0	0	3
Flying Start Place	2	0	0	0	2
Crèche*	2	1	0	0	3
After School Club	6	3	0	0	9
Breakfast Club	5	4	0	0	9
Free Breakfast Club	17	6	0	0	23
Playscheme	3	0	0	0	3
Open Access	0	0	0	0	0
Nanny	0	0	0	0	0
Other	3	1	0	0	4

The table below shows the number of parents using each type of service within the local authority area during school holidays.

	Language of the childcare setting				
	Welsh	Welsh & English	English & some bilingual elements	English	TOTAL
Childminder	11	4	1	0	16
Nursery	11	7	0	0	18
Flying Start Place	0	0	0	0	0
Crèche*	2	0	0	0	2
Playscheme	2	2	0	0	4
Open Access	0	0	0	0	0
Nanny	0	0	0	0	0
Holiday club	4	4	0	0	8
Other	1	2	0	0	3

*many parents refer to nursery provision as a crèche

Overall there is more use of childcare during school term time, with the most utilised being free breakfast clubs, nurseries, morning Playgroup and Childminders.
During school holidays, nurseries and childminders are the most utilised.

24 parents noted that they used childcare provision outside the local authority area, 14 of those were during term time and 10 during school holidays. 55% of the provision being used were childminders.
9 parents noted that they used a mixture of both within and outside the local authority provision, 7 of those were during term time and 2 during school holidays.

69 parents noted that they used family and/or friends to meet their childcare needs.

Childcare places used by language category

The chart below shows the language of the services being used by parents, within the local authority area in term time and school holidays.

Language of Provision being Used

1% — 1%

27%

71%

- ■ Welsh Language
- ■ Welsh & English
- ■ English with some bilingual elements
- ■ English
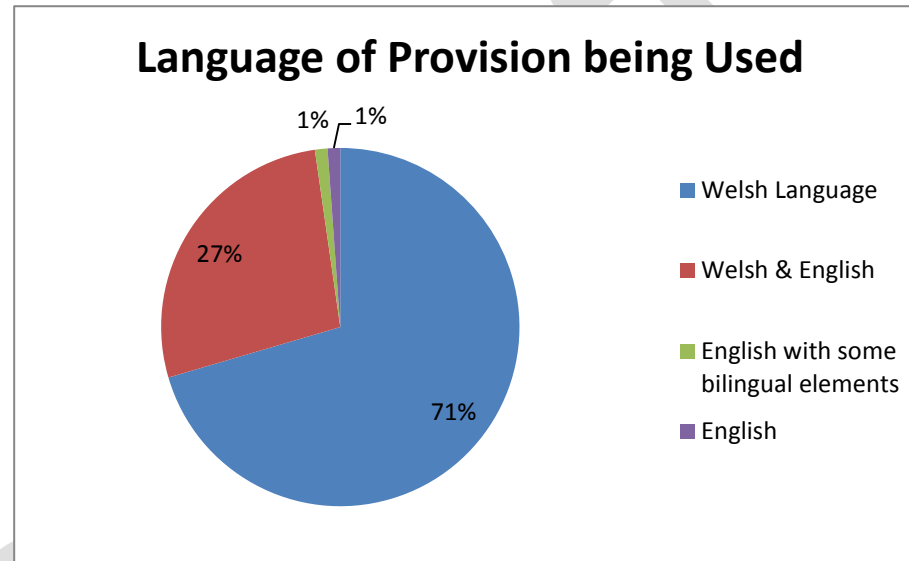
98% of the childcare provision being used by parents within the county is either Welsh or Bilingual.

Parents who used childcare outside the local authority area utilised 83% Welsh or Bilingual settings and 17% English with some bilingual elements settings.

Number and Type of child places used (full time, part time, ad hoc)

Not all parents completed this section of the questionnaire, for those that did complete this section the table below shows the type of child places being used by parents.

	Full Time	Part Time	Ad-hoc
Childminder	22	27	7
Full Day Care	23	36	9
Sessional Day Care	16	31	12
Crèche*	14	12	0
Out of School Care	11	25	10
Open Access Play Provision	5	9	5
Nanny	1	4	2
Family & Friends	25	47	16

*many parents refer to nursery provision as a crèche

Across all the types of childcare, 32% of children attend on a full time basis, 53% attend part time and 16% ad-hoc sessions.

Age range of children using childcare

The table below shows the number of children, across the different age groups, who were using childcare, according to the parents survey

Age Range	Childminder	Full Day Care	Sessional Care	Crèche	Out of School Care	Open Access Play	Nanny	TOTAL
Under 12 months	5	6	6	3	2	1	0	22
12 – 18 months	11	9	3	2	3	3	2	30
19 – 23 months	3	3	0	1	1	6	0	8
2 years	14	22	17	10	11	2	2	76
3 years	11	13	20	5	10	3	1	60
4 years	3	5	7	1	7	2	0	25
5 – 7 years	6	8	6	4	9	2	1	36
8 – 11 years	3	2	0	0	3	0	1	38
12 – 14 years	0	0	0	0	0	0	0	0
15 – 17 years	0	0	0	0	0	0	0	0

It has to questioned whether all parents have understood the childcare definitions, as open access play provision would normally only cater for children aged over 5 years, and would definitely not be suitable for children aged under 3 years of age, the figures highlighted in red in the above table should therefore be discounted.

Of those that completed the survey, 46% were using childcare for children aged 2 & 3 years, there were no respondents using childcare for children aged over 11 years.

Reasons for using childcare

The table below shows the main reasons why parents use childcare:

Reasons	Number of Respondents
Employment	82
Unpaid voluntary work	3
Study	1
Seek employment	2
Seek training or education opportunities	1
Social or learning benefits for my child/children	11
Assisted Places	0
To take advantage of Early Years Education Entitlement	2
To take advantage of Flying Start Entitlement	2
Other	4

As expected, 76% of parents who completed the survey stated that employment was the main reason why they used childcare. A further 10% used childcare for the social or learning benefits for their child/children.

Age range of children not using childcare
The table below shows the number of children, across the different age groups, who were not using childcare, according to the parents survey

Age Range	Number of children
Under 12 months	16
12 – 18 months	11
19 – 23 months	6
2 years	10
3 years	17
4 years	20
5 – 7 years	73
8 – 11 years	67
12 – 14 years	47
15 – 17 years	35
N/A	41

Reasons for not using childcare

The table below shows the reasons why parents do not use childcare for some or all of their children:

Reasons		Number of respondents
My children are old enough to look after themselves		29
I am/my partner is a stay at home parent and I have no need for childcare		17
My partner/family/friends look after my children		68
There is no childcare available at the times that I need it		17
Times where childcare is not available:	Before 8am	42
	After 6pm	42
	Over-night Care	10

Times where childcare is not available:	Other (please specify)	22
There is no childcare that can cater for my child's/children's additional needs		4
There is no wrap around or after school club at my child/children's school		19
There is no childcare that is in the right location		8
There is no childcare that can cater for my child's/children's cultural needs		0
There is no suitable Welsh Medium provision		0
Childcare is too expensive		62
I have problems with transport		5
Other (please specify)		26
	Weekend Care	34

Parents could choose 1 or more of the reasons that applied to them.

28% of those that responded don't use childcare because either they are a stay at home parent, they use family or friends or their child/children are old enough to look after themselves.
15% stated that childcare is too expensive, 10% stated that they needed childcare either before 8am or after 6pm with a further 3% requiring over-night care and 8% requiring weekend care.

5% of parents require wrap around or after school provision at their child's school.

4 parents stated that there was no childcare that can cater for their child's/children's additional needs.

No parents stated that they could not find suitable Welsh language childcare, and only 2% of respondents stated that childcare was not in the right location, indicating that we have adequate Welsh language provision to meet parent's needs and the majority of provision in the areas where it is required.

Accessibility, availability and affordability of childcare provision

The graph below shows parents views on suggested improvements to the accessibility, availability and affordability of childcare provision in Gwynedd during term time and school holidays:
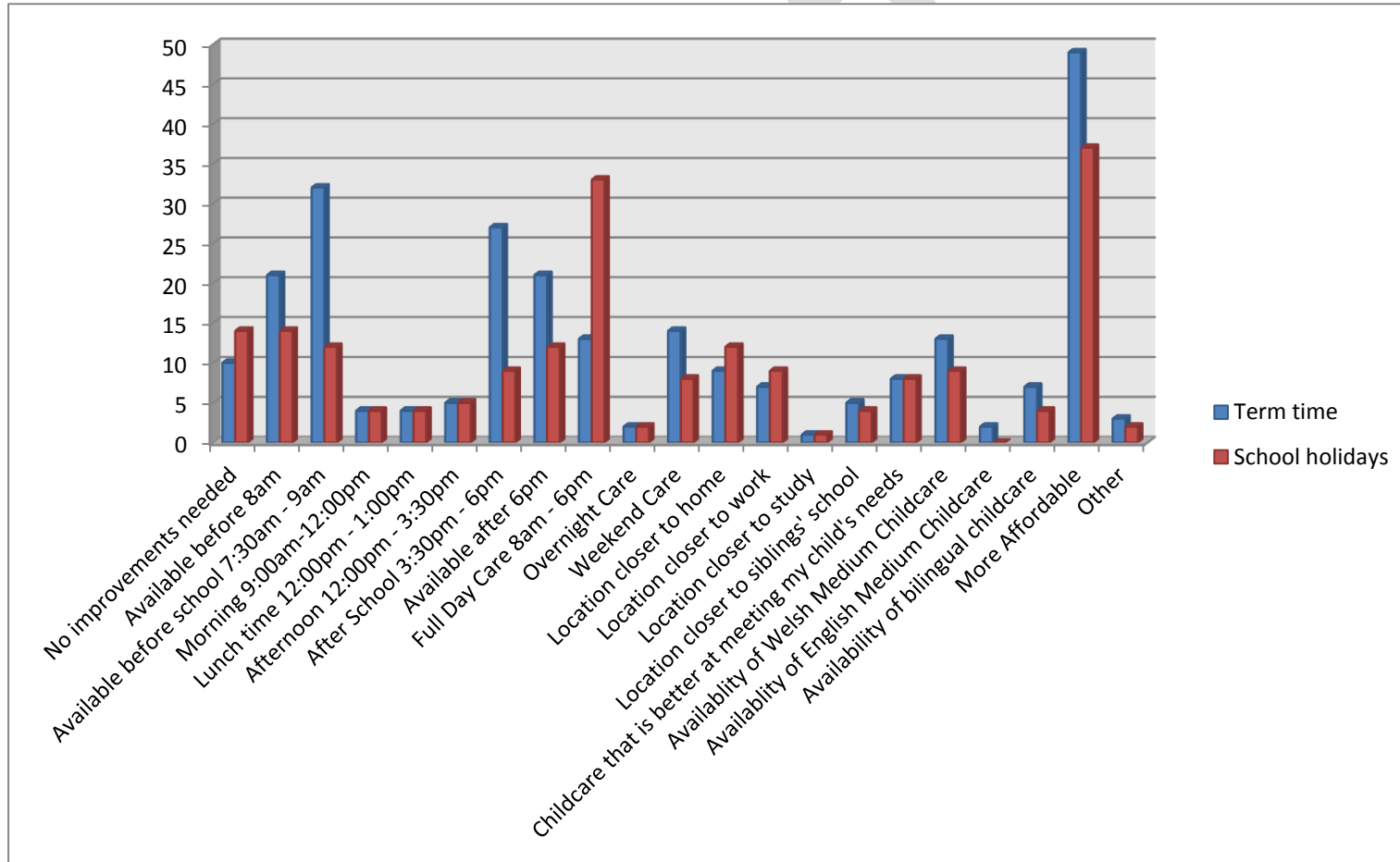
The main area that parents suggested needed improving both during school term time and school holidays was affordability of childcare, 49 parents noted this area for improvement for school term time and 37 for the school holidays.

During school term time, availability before school, after school and after 6pm are highlighted as areas that need improving, as well as more availability of weekend care.

During school holidays, availability of Full Day Care was highlighted as the main area requiring improvement.

Parental views on the childcare on offer

The table below shows parental satisfaction with the childcare provision that they were using at the time of the survey:

	Agree	Disagree	Don't know
I am satisfied with the quality of my childcare during term time	72	8	4
I am satisfied with the quality of my childcare during school holidays	48	16	4
There is a good choice of childcare in the County	29	44	14
Childcare isn't available at the time required	35	28	13
There is little choice in the types of childcare available and the services offered	44	30	8
Childcare is well located	54	24	6
No childcare available for the age of my child	13	50	5
Childcare caters for my child/children's needs	54	15	7
I would like my child/children to attend more registered childcare (increase in hours)	34	39	5
Childcare is too expensive	74	9	3
I would prefer to use family/friends for childcare	28	43	9
I have a problem with childcare arrangements that break down or are unreliable	20	49	5
Lack of childcare is a barrier to me accessing employment or training	22	44	7
I know where to find out information about childcare	53	24	7
I know where to find information on financial assistance for childcare	28	42	15
There is enough Welsh Medium childcare	62	16	8
There is enough childcare available in the language of my choice	52	23	11

Affordability of childcare was once again highlighted by parents in this part of the survey, with 86% agreement that childcare is too expensive

86% of parents were satisfied with the quality of childcare during school term time, however this fell to 71% during school holidays.
Just under 50% agreed that there is a good choice of childcare in the County, however 64% agreed that childcare is well located.

Lack of childcare was highlighted by 30% of respondents as being a barrier to them accessing employment or training, with 49% also noting that they do not know where to find information on financial assistance for childcare.
28% also noted that they do not know where to find information about childcare in Gwynedd.

For those parents who do not currently use formal childcare, the table below highlights which factors would be important if they were to use childcare in the future:

Important Factors		Number of respondents
Choice of different childcare types		23
Good quality childcare		35
Affordable childcare		162
Transport/ Pick up		149
Close to home		52
Close to work		120
Close to child's school		44
Language choice		85
Language choice highlighted:	Welsh medium	85
	Welsh and English medium	49
	English Medium	5
	Any other languages (please state)	1
Play opportunities		83
After school/ During holidays		113
Flexible payment		63
Provision for additional learning needs/ disability		26
Social opportunities		36
Childcare that caters for my child's cultural/ additional needs		18
Flexible Hours/ Ad hoc		88
Other		3

The most important areas for parents were affordability, someone who could transport / pick up their child, childcare closer to their place of work and after school / holiday provision.
Also of importance was Welsh language provision, flexible hours and play opportunities.

Summary of key strengths and weaknesses

There was a poor response rate to the survey which therefore gives us limited information and isn't necessarily a true representation of the childcare needs of parents.

The validity of some of the data we received has to be questioned, some parents have indicated that their children attend childcare provision which would not be available to a child of their age.
Some parents have also stated that there child attends a crèche, in our experience a number of parents refer to full day nursery provision as a 'crèche'.

There was an overall 86% satisfaction rate with childcare during term time, but this fell slightly to 71% during school holidays.

Affordability of childcare is the main area parents suggested needed improving both during school term time and holidays.
15% of parents who do not use childcare stated that affordability was the main issue.

Other areas that parents who use childcare suggested needed improving were, availability before school (7:30 – 9am), after school (3:30 – 6pm), after 6pm and weekend care. These areas were also highlighted by parents as reasons why they did not use childcare.

During school holidays, availability of full day care provision was highlighted as the main area requiring improvement.

No parents stated that they could not find suitable Welsh language childcare, and only 2% of respondents stated that childcare was not in the right location, indicating that we have adequate Welsh language provision to meet parent's needs and the majority of provision in the areas where it is required.

4 parents stated that there was no childcare that can cater for their child's/children's additional needs.

Lack of childcare was highlighted by 30% of respondents as being a barrier to them accessing employment or training.

28% of parents noted that they do not know where to find information about childcare in Gwynedd, and 49% noted that they do not know where to find information on financial assistance for childcare.

7.2. Demand for Childcare Provision

Analysis of Demand for Childcare Provision

Parents were asked about their future childcare requirements within the parental survey. Parents who completed this part of the survey were:

- parents who currently used childcare and intended using new or additional services in the future; or
- parents not currently using childcare but intending to do so in the future

Parents already using childcare but had no intention of increasing the amount of childcare they used were not required to complete this section.

This section should therefore give us an indication of the childcare provision we need to be developing within the County. However due to the high response rate in this section and anomalies in the data, it has to questioned whether parents have completely understood this part of the survey, and as such the following information is very much a guide rather than being definitive.

Many parents had not included their postcode therefore it has not been possible to break down the data into the 8 Areas as in previous sections.

Range of services required

This question was asked so that parents could indicate the type of childcare they would like to use in the future and the services they would require within that type of childcare. Parents were asked to tick all the services that they may require, so one respondent may have ticked more than one service.

The table on the following pages shows use the range of services required by childcare type and language requirements.

Childcare Type	Childcare SERVICE	Language of Provision			
		Welsh	Welsh & English	English	Total
Childminder	Full day care	20	9	0	29
	Half day care (am)	7	3	0	10
	Half day care (pm)	9	2	0	11
	Before school	5	2	0	7
	After school	17	6	0	23
	Wrap around a part time Early Education placement, e.g. playgroup or school or nursery	8	7	1	16
	Holiday provision	10	7	1	18
	Other – please state	1	0	0	1
Full Day Care	Full day Nursery	14	9	0	23
	Half day Nursery (am)	8	2	0	10
	Half day Nursery (pm)	3	3	0	6
	Before school	5	5	0	10
	After school	12	8	0	20
	Playgroup/ Cylch Meithrin (am)	7	2	0	9
	Playgroup/ Cylch Meithrin (pm)	5	2	0	
	Crèche	8	5	0	13
	Wrap around a part time Early Education placement, e.g. playgroup or school or nursery	15	10	1	26
	Lunch	3	3	0	6
	Holiday provision	3	3	0	6
	Other – please state	2	0	0	2

Sessional Day Care	Playgroup/ Cylch Meithrin AM	18	16	1	35
	Playgroup/ Cylch Meithrin PM	6	6	0	12
	Wrap around a part time Early Education placement, e.g. playgroup or school or nursery	6	6	0	12
	Lunch	5	1	0	6
	Other – please state	0	0	0	0
Crèches	Full day care	11	8	0	19
	Mornings only	1	3	0	4
	Afternoons only	3	1	0	4
	Holiday child care	6	7	0	13
	Other – please state	1	0	0	1
Out of School Care	Before school (Breakfast Club)	13	11	0	24
	After school	18	13	0	31
	Holiday childcare throughout the day	12	10	0	22
	Play scheme sessions	12	4	0	16
	Other – please state	0	0	0	0
Open access play provision	Before School	5	5	0	10
	After school	12	7	0	19
	Holiday Playscheme	11	10	1	22
	Play scheme sessions	5	3	0	8
	Other – please state	0	0	0	0

Nanny (Voluntary Approval Scheme)	Full day care	3	2	0	5
	Half day care (am)	3	0	0	3
	Half day care (pm)	2	0	0	2
	Before school	3	0	0	3
	After school	4	1	0	5
	Wrap around a part time Early Education placement, e.g. playgroup or school or nursery	2	1	0	3
	Lunch	3	0	0	3
	Holiday childcare	4	2	0	6
	Other – please state	1	0	0	0
Family and/ or friends		42	26	1	69

The childcare type most in demand is Full Day Care, followed by Childminders and Out of School Care.
69 parents noted that they would require family/friends to care for their child/children.

Across all childcare types, full day provision is the most required followed by after school, holiday care and wrap around services. Within Sessional Day Care, 75% of parents require a morning session in comparison to 25% who require an afternoon session.

61% of parents require Welsh language provision, 38% require Welsh & English language and only 1% would be looking for English language provision in the future.

Number and Type of child places required (full time, part time, ad hoc)

The table below indicates the types of places parents will require in the future.

	Full Time	Part Time	Ad-hoc
Childminder	25	29	8
Full Day Care	23	29	8
Sessional Day Care	17	23	6
Crèche	18	14	5
Out of School Care	17	18	7
Open Access Play Provision	11	12	7
Nanny	5	4	4

40% of parents would be looking for full time childcare, which is a slight increase on the 32% of children who currently attend on a full time basis.
45% of parents would be looking for part time childcare, which is a slight decrease on the 53% who currently attend part time.

Times at which childcare provision is required

The table below shows the times which parents would require childcare in the future.

Times	Childminder	Full day care	Sessional day care	Crèche	Out of school care	Open access play provision	Nanny
8:00 - 18:00	43	33	20	20	25	16	5
7:00 – 9:00	8	6	6	4	7	2	0
9:00 - 12:00	12	14	11	6	8	4	2
12:00 - 13:00	9	10	8	6	7	3	2
13:00 - 15:30	9	7	8	6	8	4	2
15:30 –18:00	13	12	6	7	15	6	3
After 18:00	3	4	2	1	2	2	1
18:00 - 7.00	1	1	1	0	1	0	0

The majority of parents would be looking for full day provision (08:00 – 18:00), with a small percentage requiring childcare which is available after 6pm or overnight.

Age range of children for whom childcare is required

Parents who intend to use childcare in the future were asked what age their child/children will be when they start to use childcare.

Age Range	Number of children
Under 12 months	72
12 – 18 months	26
19 – 23 months	11
2 years	27
3 years	44
4 years	14
5 – 7 years	50
8 – 11 years	24
12 – 14 years	0
15 – 17 years	0

There is no future demand for childcare for over 11 year olds.
The majority of parents would require childcare for a child under 12 months of age.

Number of places required for children who have additional learning needs or require specialist care due to a disability.
Of the parents who responded only 3 noted that they would require childcare in the future for a child with additional needs.

Summary of key strengths and weaknesses

61% of parents require Welsh language provision, 38% require Welsh & English language and only 1% would be looking for English language provision in the future. This would be consistent with the levels of Welsh language provision that we currently have in the County.

40% of parents would be looking for full time childcare, which is a slight increase on the 32% of children who currently attend on a full time basis.
45% of parents would be looking for part time childcare, which is a slight decrease on the 53% who currently attend part time.

A small percentage of parents would require childcare that is available after 6pm. This is an area that was noted as needing improvement in the previous section.

7.3. Barriers to Childcare Provision

Accessibility of Childcare Provision

In addition to the parental consultation which has been referred to in the previous sections, a shorter questionnaire was also developed to be used during various parent focus groups, and also by the Family Support Team during their groups or training courses.

The questions asked were:

1. Do you know where to access information about the childcare available in your area?
2. Do you know where to access information about financial support to help pay childcare costs?
3. What, if anything, prevents you from using childcare?
4. What other local childcare developments would you like to see?

A total of 48 short questionnaires were completed.

Question 1:

42% stated that they did not know where to access information about childcare, only 8 respondents noted 'Gwynedd-Ni' (Family Information Service)

Question 2:

58% stated that they did not know where to access information about financial support to help pay childcare costs, only 1 respondent noted Gwynedd-Ni, with a further 3 noting the Job Centre.

Question 3:

Of those that responded 22 stated that cost was the biggest barrier to them accessing childcare, comments included:

"cheaper for me to stay at home with my child"

"don't use childcare as the cost is too much"

"financial aspects and missing time with my child"

A further 6 noted that trust was an issue, with comments including:

"not knowing who my kids are with"

"want to look after my child myself, find it hard to trust a stranger with my young child"

"not knowing who my child is going to"

One parent also noted that the barrier to her using childcare was: "having a child with additional needs and not being able to use childcare for him"

Question4:
17 respondents noted that they would like 'more choice / longer opening hours / more flexibility in opening hours'
1 noted 'not having to pay for 1-1 support for children with additional needs'
2 noted 'more holiday clubs'
5 noted that they would like 'higher quality'
1 noted 'cheap / free working hours would help'

A focus group was also help with parents in Plas Pawb, Maesincla were the following issues were noted:
'difficult to utilise the 10 hours of Early Years Education when you are working'
'some nurseries do not provide a school pick up service'
'difficult if you are working and arrangements breakdown at short notice'

Barriers experienced by parents from the parental online questionnaire were very similar to those noted in the short questionnaire:

28% noted that they did not know where to find information about childcare in Gwynedd.
49% noted that they did not know where to find information about financial support to help pay childcare costs.
Affordability is the main area parents suggested needed improving, and 15% of parents who do not use childcare stated that affordability was the main issue.
More availability before school, after school and after 6pm are needed, as well as increased availability of weekend care.

No parents stated that they could not find suitable Welsh language childcare, with one parent noting in the focus group that 'there is plenty of choice of Welsh language provision in the area'.
Only 2% of respondents to the online questionnaire stated that childcare was not in the right location, indicating that the majority of provision is in the areas where it is required.

Barriers experienced by specific target groups

(i) Working Parents
76% of parents who completed the online survey stated that employment was the main reason why they used childcare.
Making childcare more affordable was the main area these parents suggested needed improvement. Availability before school (7:30 – 9am) and after school (3:30 – 6pm) as well as more availability of weekend care were also noted as areas that needed improvement.

(ii) Parents seeking work or training opportunities
22 parents who completed the online survey stated that a lack of childcare was a barrier to them accessing employment or training. Affordability and availability before 8am, after 6pm and on weekends were again highlighted as reasons why parents do not use childcare

(iii) Unemployed Households
4% of parents who responded to the online survey stated that they do not use childcare because they are a stay at home parent, and therefore have no need.
Cost and availability were again stated as reasons for not using childcare.

(iv) Low income families
Affordability is the main barrier for low income families. Of concern is the high number of parents who do not know where to access information about financial support to help pay childcare costs.

(v) Lone parent families
One parent in the focus group stated that 'it is difficult if you are working and arrangements breakdown at short notice'

(vi) Families from ethnic minority backgrounds
There are very few families from ethnic minority backgrounds living in Gwynedd, and only 2.5% of parents who completed the online survey stated that they were from an ethnic minority background. Barriers were as stated for all parents.

<u>(vii) Families with children who have additional learning needs, or a disability</u>
4 parents who completed the online survey stated that there was no childcare that can cater for their child's additional needs
One parent who completed the short questionnaire noted that the barrier to her using childcare was: 'having a child with additional needs and not being able to use childcare for him', and another noted a development she would like to sees was 'not having to pay for 1-1 support for children with additional needs'

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

Analysis of Early Years Part Time Education (Foundation Phase)
The table below shows the number of providers who are funded to provide Early Years Part Time Education, by language category and area:

	Full Day Care/ Nursery								Sessional Day Care							
	Area								Area							
Language	1	2	3	4	5	6	7	8	1	2	3	4	5	6	7	8
Welsh						1			9	18	8	8	4	5	4	2
Welsh & English	2								2		1			1		1

There are 66 providers of Early Years Education, 62 of which are Mudiad Meithrin Cylchoedd Meithrin, 1 Playgroup and 3 full day care nurseries.
No childminders are funded to provide Early Years Education.

All Early Years Education is delivered according to Gwynedd Council's language policy, with the following stipulations within their contract:
- The provider will provide education that complies with Gwynedd Council's Welsh Medium Education Plan, by ensuring the quality of Welsh is adequate to ensure Welsh or Bilingual medium education.

When accepting the agreement, the provider will have to comply with the relevant aims listed in Gwynedd Council's Welsh language Medium Education Plan:
- In the Early Years settings firm foundations ar set by immersing the children in the Welsh Language. It must be ensured that the main teaching language is Welsh. This will ensure that all pupils within the County are bilingual by the time they leave secondary school.

The table below shows the number of schools funded to provide Early Years Part Time Education:

Language	Location of Schools							
	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Welsh	14	24	19	10	6	8	2	4
Welsh & English	1							

All but one of the Primary schools in Gwynedd deliver Early Years Part time Education in Welsh.

The number of children attending provision provided by childcare providers is shown below:

Language	Provision by Childcare Providers - Number of 3 year olds							
	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Welsh	125	192	72	44	8	41	35	9
Welsh & English	29		4			7		14
Total	**154**	**192**	**76**	**44**	**8**	**48**	**35**	**23**

Language	Provision by Childcare Providers - Number of 4 year olds							
	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8
Welsh						9	38	
Welsh & English						12		
Total						**21**	**38**	

This data was gathered from all the Early Years Education providers during the 2016 summer term, there were 639 children being funded; 580 were 3 years of age and 59 were 4 years of age.
Only a few providers in Area 6 & 7 (Dolgellau + Penllyn) are funded for 4 year olds as their local Primary School does not accept children until the September after their 4th birthday.

The tables below shows the weekly attendance profile of children attending provision provided by childcare providers:

	Provision by Childcare Providers - Number of 3 year olds															
	Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8	
Language	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m
Welsh																
Monday	21	15	83	24	36	10	26		4		12	5	23	6	5	
Tuesday	23	15	101	16	30	9	26				15	2	23	9	6	
Wednesday	25	19	100	14	34		26				20	1	32	10	6	
Thursday	18	6	92	16	25	4	24				20	2	30	9	7	
Friday	20	4	79	15	27	4	8				12	3	16		6	
Welsh & English																
Monday	16	5	2		11				2						13	
Tuesday	17	5	2		13				1						12	
Wednesday	16	5	2		12				1						12	
Thursday	16	5	2		12				3						13	
Friday	16	3	2												12	

	Provision by Childcare Providers - Number of 4 year olds															
	Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8	
Language	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m
Welsh																
Monday													15	32		
Tuesday											3		15	32		
Wednesday												5	19	32		
Thursday													18	32		
Friday													18			

Source: CSSIW SASS Data 2016

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The data in the previous tables was gathered from the CSSIW SASS return. Not all providers had completed this section therefore the data should be used as a guide rather than definitive.
78% of children attend morning sessions, and there is an even distribution of attendance across all the days except for Fridays when numbers are significantly less.

The number of children attending provision provided by schools is shown below:

Language	Number of 3/4 year old children															
	Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8	
	a.m	p.m	a.m.	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m	a.m	p.m
Welsh	238	64	235	121	133	52	66	30	49	25	28	27	27	0	23	20
Welsh & English	8															
Total	310		356		185		96		74		55		27		43	

The data in the table was provided by the Education Department for children attending schools in September 2016.
70% of children attend morning sessions.

There are currently 2243 Early Years Education places available across the county, 1097 of these places are in childcare settings and 1146 are in Local Authority Primary Schools.
Primary schools only accept children in the Autumn term, whilst childcare settings accept children in the Autumn, Spring and Summer Terms.
The number of places required is analysed through population / live birth data, take up varies annually and the number of places available is flexible. Both settings and schools will make additional places available if there is parental demand and they have capacity.

Of the parents who completed the online parental survey 24 stated that they were claiming their free Early Years Education entitlement and 18 stated that they were not.
Reasons for not claiming the entitlement are shown in the table below:

Reasoning	Gwynedd
I don't know about the entitlement	12
I don't think my child/children will benefit	0
My child/children are already in full time education	3
There is an additional charge for extra hours	0
I could not get a place at my chosen provider	0
There is no suitable Welsh Medium provision available	0
Timings of the session doesn't meet my needs	1
Other	2

The following additional childcare requirements were highlighted by parents as what they would require in order for them to take up their entitlement:

Childcare requirements	Gwynedd
Breakfast Club	10
Lunchtime Club	7
Additional Playgroup/ Cylch Meithrin/ Nursery session (9am-12pm)	6
Additional Playgroup/ Cylch Meithrin/ Nursery session (12pm and 3.30pm)	6
After nursery/school provision	13

Summary of key strengths and weaknesses

Across Gwynedd there are sufficient Early Years Part Time Education places for all children who wish to take up their entitlement. Take up of places is higher in the local Primary Schools compared to the non-maintained childcare settings. However there is more flexibility within the childcare settings as they accept children each term and the entitlement can be shared across more than one setting. Also, there is no minimum number of sessions that must be taken in order to access the funding.

The Gwynedd Early Years Quality Group co-ordinate and manage the support required by the Foundation Phase non-maintained settings. The Foundation Phase Support Teachers categorise the settings on a traffic light system in order to mangage density of support to settings. It is also stipulated within the contract with Gwynedd Council that if the quality of service weakens they are categorised to have further support. This maintains the quality of service.
Of the 22 Estyn inspections carried out on non-maintained settings between July 2014 and June 2016, 86% were rated as 'Good' and 14% rated 'Satisfactory'.

Only 3 Full Day Nurseries are entitled to deliver Early Years Education, with the vast majority of provision being in Sessional Day Care settings.
Many working parents require additional services such as breakfast clubs/wraparound in order to access their entitlement.

There is more availability of morning sessions, and there are more settings and schools offering the entitlement in Areas 1 & 2.

12 parents who completed the online parental survey stated that they did not know about the entitlement.

Analysis of Flying Start Provision

Following Flying Start expansion during the past few years Gwynedd Council has worked closely with the Welsh Government to develop the required amount of childcare places within Flying Start areas. All the six Flying Start areas have sufficient childcare for the two year old children within the scheme. The final childcare setting was registered with Flying Start in September 2016 which services newly added areas of Penygroes village.

During recent expansion of programme all settings have received capital investment in order to improve quality of the environment in order to reach Flying Start quality standards to the sum of £549,578. All 13 Flying Start settings are closely monitored by the Flying Start teachers whom conduct regular support visits and work closely with Mudiad Meithrin in order to continually improve the standards.

Since 2011 attendance at Flying Start settings have gradually improved which is a strength within the programme – see table below.

It has improved form 76% to 83% in 2015-16.
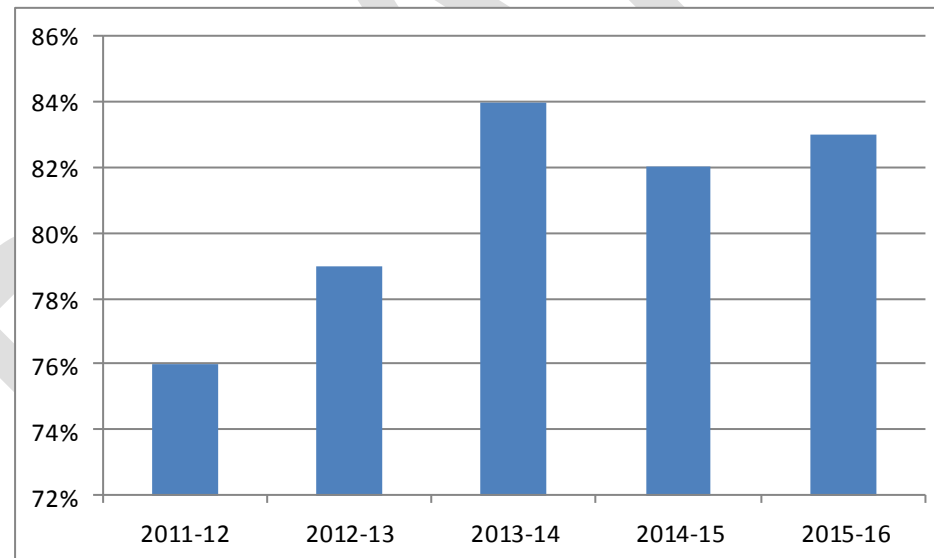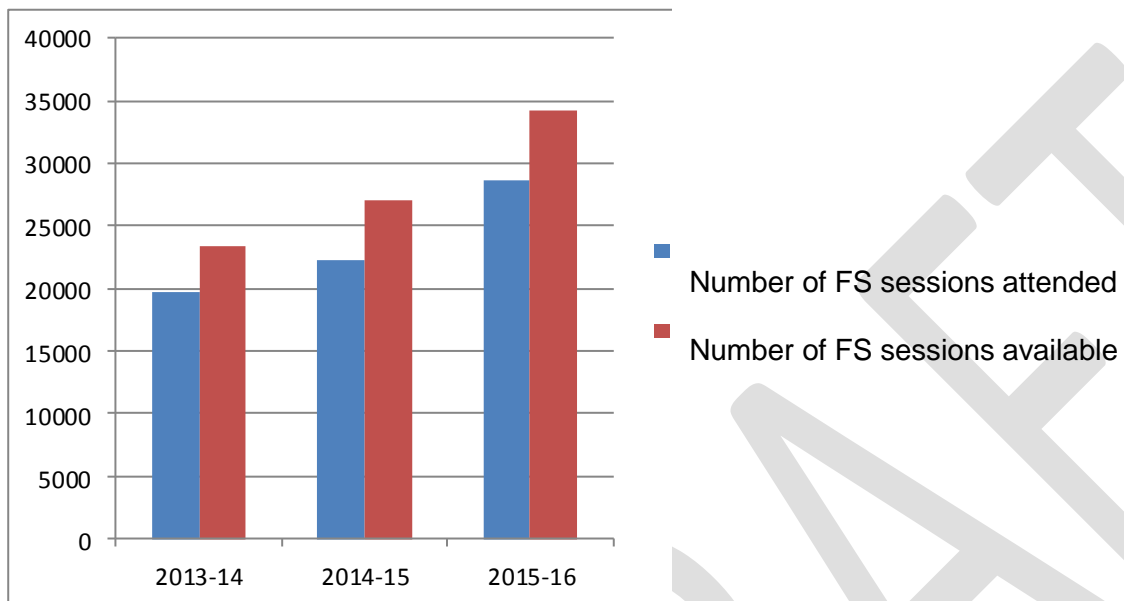
The above chart shows the number of contracted sessions has increased in the last period due to expansion of the programme.

The Flying Start team monitor the attendance figures regularly with the settings and low attendance is addressed by a multi-agency discussion is held if necessary to discuss issues arising that faced some parents with attending the settings.

Most parents that do not take up the childcare entitlement utilise alternative childcare which isn't contracted within programme i.e full day nursery or Cylch Meithrin outside of catchment.

Summary of key strengths and weaknesses

The quality of the childcare is the strength of the programme.

Flying Start have invested in the workforce development of the Flying Start childcare staff with a menu of training such as Elklan, Makaton, Promoting Positive Behaviour – Cai &Mai, Tatty Bumpkin – Yoga, Nutrition – Tiny Tums, SOGS, First Aid, Food Hygiene and Safeguarding. Also a high majority of the staff have reached a Level 3 qualification or higher within the 13 Flying Start settings.

Number of settings	**13**
Number of care leaders qualified to level 5 (previously 4)	**9**
Number of other staff qualified to level 5 (previously 4)	**5**
Number of other staff qualified to level 3	**79**
Number of other staff qualified to below level 3	**8**
Number of supernumerary staff within the above	**19**

Figures Jan 2017 – Flying Start Monitoring Data

All settings have reached or working towards a childcare quality assurance mark.

All Flying Start settings have registered with the Gwynedd Healthy and Sustainable Pre-school Scheme and have received training and support from the coordinator and officials to promote healthy eating, cooking skills, food hygiene, physical activity etc.

All Flying Start childcare providers offer a bilingual service for the children

All providers have registered with the Designed to Smile scheme, and some have successfully received the Designed to Smile accreditation.
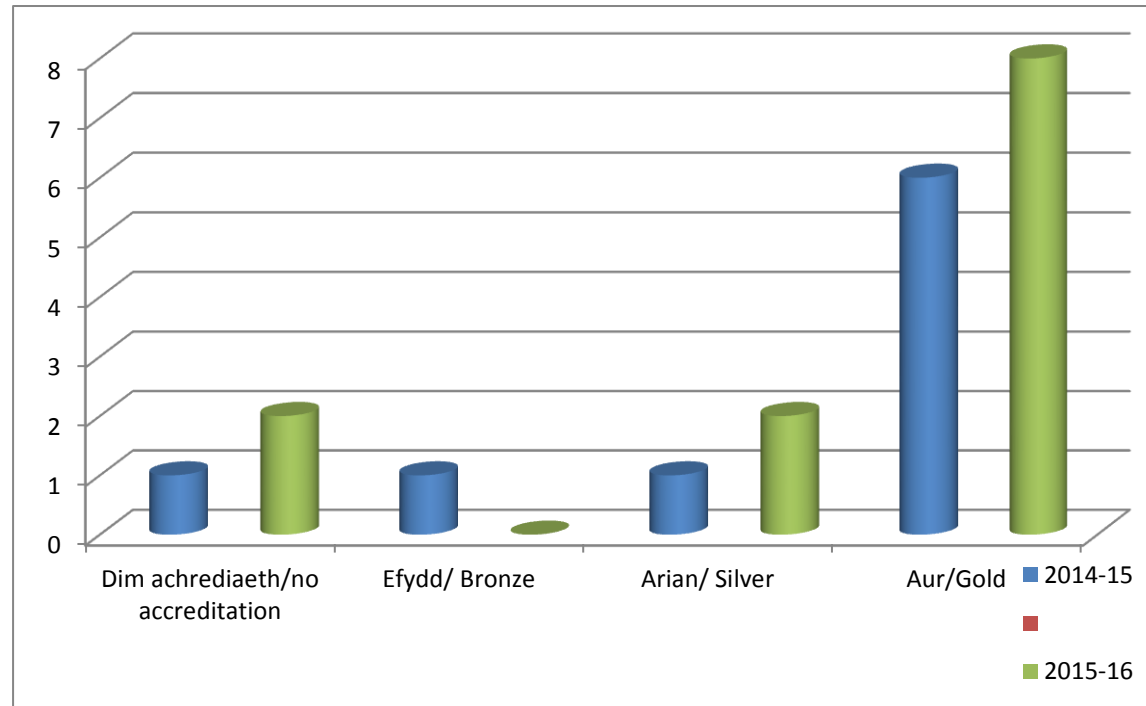
Designed to Smile accreditation for Flying Start settings 2014 - 2016

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9. Free Breakfast Club Provision

Analysis of Free Breakfast Club Provision		
Area	**Name of School**	**Number Attending**
1	Bodfeurig	12
	Penybryn,Bethesda	50
	Glanadda	20
	Llanllechid	76
	Glancegin	48
	Babanod, Coedmawr	9
	Abercaseg	45
	Y Felinheli	55
	Hirael	25
	Llandygai	49
	Tregarth	33
	Cae Top	44
	Ein Harglwyddes	53
2	Gwaun Gynfi	48
	Llanrug	90
	Bethel	28
	Brynaerau	13
	Gelli	52
	Dolbadarn	50
	Felinwnda	17
	Llanllyfni	26
	Baladeulyn	17
	Nebo	11
	Penisarwaen	29
	Bro Lleu	54
	Rhiwlas	20

	2	Rhosgadfan	25
		Talysarn	40
		Waunfawr	61
		Yr Hendre	80
		Bontnewydd	65
		Bro Llifon	50
		Maesincla	110
		Santes Helen	20
	3	Nefyn	9
		Abererch	29
		Chwilog	19
		Edern	20
		Bro Plenydd	16
		Llanbedrog	27
		Llangybi	21
		Morfa Nefyn	15
		Yr Eifl	13
		Cymerau	44
		Foelgron	16
	4	Beddgelert	6
		Borthygest	22
		Treferthyr	28
		Garndolbenmaen	35
		Eifion Wyn	44
		Y Garreg	9
		Y Gorlan	30
		Cefn Coch	46
		Talsarnau	25
		Tanycastell	28

Area	Name of School	Number Attending
5	Bro Cynfal	33
	Edmwnd Prys	22
	Manod	28
	Tanygrisiau	45
	Bro Hedd Wyn	32
	Maenofferen	50
6	Y Traeth	33
	Dyffryn Dulas	11
	Ganllwyd	5
	Llanbedr	12
	Ieuan Gwynedd	8
	Dolgellau	16
7	Bro Tegid	25
	O M Edwards	31
	Bro Trwyweryn	17
	Ffridd y Llyn	25
	Beuno Sant	10
8	Pennal	11
	Penybryn, Tywyn	34
	Y Friog	15
	Craig y Deryn	28

A total of 76 primary schools across Gwynedd have free breakfast club provision with 2418 children attending. There is no limit on the number of children who can attend.
The majority of settings are open at 8a.m.

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

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

The table below shows the number of parents who completed the online survey, and stated that they claimed the childcare element of working tax / universal credit:

Number of respondents claiming	Childcare Type Used	Number of Children attending
24	Childminder	7
	Nursery	14
	Cylch Meithrin / Playgroup	11
	Crèche	3
	After School Club	7
	Breakfast Club	12
	Playscheme	0
	Open Access	0
	Nanny	0

The table below shows the number of parents who completed the online survey, and stated that they claim tax free childcare or receive assistance through an Employer Supported Scheme:

Number of respondents claiming	Childcare Type Used	Number of Children attending
19	Childminder	11
	Nursery	5
	Cylch Meithrin/ Playgroup	2
	Crèche	3
	After School Club	2
	Breakfast Club	3
	Playscheme	3
	Open Access	0
	Nanny	0

The table below shows the number of parents who completed the online survey, and stated that they were not claiming the childcare element of working tax / universal credit:

	Total Gwynedd	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Unknown area
Number of Respondents not claiming	94	14	37	15	5	7	5	1	4	6
Intend to claim in future	9	1	3	0	1	2	0	0	1	1
Don't intend claiming in future	55	8	23	11	3	2	3	1	2	2
Unsure, if they will claim in the future	29	5	11	3	1	3	2	0	1	3

Of the 347 parents who completed the online survey, 27% are not claiming the childcare element of working tax / universal credit. 24% don't intend claiming or are unsure if they will claim in the future. Only 9 parents stated that they intend to claim in the future.

The childcare requirements of parents who intend to claim in the future were:

	Number of Children
Childminder	6
Nursery	13
Crèche	12
After School Club	3
Breakfast Club	8

The table below shows the number of parents who completed the online survey, and stated that they were not claiming tax free childcare or assistance through an Employer Supported Scheme:

	Total Gwynedd	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Unknown area
Number of Respondents not claiming	114	17	45	15	9	7	10	1	3	7
Intend to claim in future	23	4	9	3	1	3	1	0	0	2
Don't intend claiming in future	59	10	24	9	4	1	5	0	2	4
Unsure, if they will claim in the future	47	7	19	4	3	4	5	1	2	2

Of the 347 parents who completed the online survey, 33% are not claiming tax free childcare or assistance through an Employer Supported Scheme. 30% don't intend claiming or are unsure if they will claim in the future. 23 parents stated that they intend to claim in the future.

The childcare requirements of parents who intend to claim in the future were:

	Number of Children
Childminder	11
Nursery	9
Cylch Meithrin / Playgroup	9
Crèche	2
After School Club	8
Breakfast Club	6
Playscheme	3

The table below shows the reasons provided by parents for not intending to claim the childcare element of working tax credit / universal credit:

Reasoning	Number of respondents
I do not know about the childcare element of the working tax credit / universal credit	27
I know that I am not eligible	36
I am unsure whether I am eligible	29
I choose not to claim it	3
I find the process too complicated	9
I haven't the time to claim it	3
I cannot get the information or advice I need to complete my claim (please contact your local Family Information Services for assistance)	0
My circumstances change too often to enable me to claim easily	4
I do not pay for the childcare that I use	8
Setting not registered/Nannies not approved under Welsh Government's Voluntary Approval Scheme	1
Other	5

The table below shows the reasons provided by parents for not intending to claim tax free childcare or assistance through an Employer Supported Scheme:

Reasoning	Number of respondents
I do not know about tax free childcare / Employer supported scheme	42
I know that I am not eligible	17
I am unsure whether I am eligible	30
I choose not to claim it	5
I find the process too complicated	5
I haven't the time to claim it	2
I cannot get the information or advice I need to complete my claim (please contact your local Family Information Services for assistance)	1
My circumstances change too often to enable me to claim easily	2
I do not pay for the childcare that I use	8
Setting not registered/Nannies not approved under Welsh Government's Voluntary Approval Scheme	4
Other	6

Summary of key strengths and weaknesses

Only 7% of parents who completed the online questionnaire stated that they claimed the childcare element of working tax / universal credit.

Only 5.5% of parents who completed the online questionnaire stated that they claimed tax free childcare or receive assistance through an Employer Supported Scheme.

8% of parents do not know about the childcare element of working tax credit / universal credit and 12% do not know about tax free childcare / employer supported scheme.

17% of parents are unsure if they are eligible for either of these schemes, and 5.5% find the process too complicated or haven't the time to claim.

21% of parents know that they are not eligible to claim, do not pay for the childcare that they use or use non-registered settings.

Gwynedd-Ni(FIS) do offer assistance and information on childcare choices and financial support to parents, but it is noted that many parents are unaware of the service.

11. Sustainability

The Early Years Unit in Gwynedd Council recognises the importance of supporting the sustainability of the whole childcare sector within the County.

Start-Up Grants are currently available to any new childcare provision opening in the county with Childminders / Nurseries / Cylchoedd Meithrin being funded from the Local Authority budget. Direct grant funding via the Out of School Grant from Welsh Government is used to support new After School Clubs, Holiday Clubs and Holiday Playschemes.

Any start-up funding has to pass a rigorous vetting process, with CSSIW registration being a mandatory requirement for any setting to receive funding.

An extensive package of subsidised training is provided to all childcare settings annually. Mandatory training courses (eg Paediatric First Aid / Child Protection / Food Hygiene) as well as a range of CPD courses are all provided at a nominal cost of £10/person, this ensures that staff are able to attend courses without cost being an issue.

CSSIW de-registrations have not been a major issue up to now. There is a higher turnover rate for childminders compared to other types of childcare settings, but this is due to the nature of the job rather than sustainability issues.

Sustainability is becoming more of an issue for childcare settings and the introduction of the minimum wage and living wage have had an impact. It is proving difficult for settings to provide high quality childcare whilst also making it affordable to parents.

Gwynedd Council do provide annual resources grants to all registered settings who apply, and also sustainability grants to any childcare provider who finds themselves in financial difficulty.

Settings that provide Early Years Education have been affected the most in recent years with cutbacks in their funding.

Gwynedd Council are proactive in supporting Early Education settings who are in financial difficulty due to high rent costs. Available places in local primary schools are identified and the setting is supported in their relocation.

A short provider questionnaire was sent to all registered childcare settings in Gwynedd to gather information on the following 3 questions:
1. Do you have any concerns regarding your sustainability in the short / long term?
2. Do you have any urgent training needs?
3. What developments would you like to see from Gwynedd Council / Membership body in the next 5 years to support your business?

23 questionnaires were completed.

In response to question 1, 52% answered 'Yes' with comments including the following:

'the continually increasing work load makes finding volunteers who are willing to commit to the role of Registered person very difficult particularly as we are a small community. I fear that the long term sustainability is under threat'
'we are currently struggling financially to even pay wages to the extent that some members of staff have had to go without a full months wage, and the Cylch remains in debted to them until finances improve through fundraising and increased child attendance'
'in the long term – due to the implications that may arise from the 30 hours childcare offer'
'long term when the 30 hour childcare comes in, as a small playgroup we would not be able to compete with bigger groups'
'financial concerns, concerns for the future of Mudiad Meithrin, concerns about the effect the 30 hour childcare offer will have on small Cylchoedd Meithrin'
'we have lost £400 - £900 each year for the past 6 years'

In response to question 2, only 5 settings answered 'Yes' with the following training requirements being highlighted:
Behaviour Management; Child Protection; Equal Opportunities; First Aid; Health and Safety; IT training.

Responses to question 3 included the following:
'we are not a business but a charity and as such require a lot more help with regards to finances'
'more money so that we can concentrate more on the children instead of constant fundraising to support the Cylch'
'getting parents to volunteer on the committee is nigh-on impossible, and sustaining their involvement on a medium/long term basis is difficult – the transitory nature of a parent committee causes additional problems rather than resolves them. Having a more permanent management structure would help'
'support/grants to help improve facilities and resources'
'no further cuts in the grants'
'I would like to see the responsible person roll taken on by a paid member of staff who is trained and experienced in all areas of management'
'due to the ever increasing price of resources a larger grant would be beneficial, or even a supply of resources for the nursery'
'Foundation Phase courses being available to childminders who are not registered as Early Education providers'

12. Cross Border

The Childcare sufficiency Assessment should take into account those who use childcare outside the Local Authority area as well as those who travel to the Local Authority area to use childcare. Local authorities should consult with their neighbouring Local Authorities to assess the numbers involved and ensure they are reflected in the assessment.

Of the 347 responses to the online parental survey, 22 parents noted that they used childcare provision outside the local authority area, 14 of those were during term time and 10 during school holidays.
9 parents noted that they used a mixture of both within and outside the local authority provision, 7 of those were during term time and 2 during school holidays.

The table below shows the number of children from other counties and the type of childcare provision being used:

	Full Day Nursery	Childminder	Cylch Meithrin / Playgroup	TOTAL
Anglesey	36	6	2	44
Conwy	11	1	2	14
Denbigh	0	0	2	2
Powys	0	0	3	3

Anglesey account for the most childcare being used by parents from outside the local authority, with all the provision being used in Area 1(Bangor). This is as expected due to the location of large employers such as Ysbyty Gwynedd and Bangor University being within this area.

Although children from other counties are able to access their free Early Years Education entitlement in schools in Gwynedd, at present they are unable to do so in the non-maintained childcare settings.

2 parents from Conwy stated on their online survey that they used childcare in Gwynedd both during term time and school holidays.

13. Workforce Development

The table below shows the qualification levels, per childcare type:

Highest Level of Relevant Qualifications	Childminders	Full Day Care	Sessional Day Care	Out of School Care
Level 2	8	47	19	6
Level 3	42	172	129	25
Level 4	2	11	1	0
Level 5	9	21	7	3
Level 6	0	13	3	4
Level 7	0	1	0	1
None	7	5	7	0
Not specified	18	16	6	4

Source: CSSIW SASS Data 2016

The overall picture shows that of those that completed the CSSIW SASS data in 2016, 63% have a level 3 qualification.
Only 3% stated that they had no qualification, with a further 7.5% not specifying their qualification.

20% of childminders stated that they were currently working towards a higher level qualification.
33% of full day care staff stated that they were currently working towards a higher level qualification.
32% of sessional care staff stated that they were currently working towards a higher level qualification.
42% of out of school care staff stated that they were currently working towards a higher level qualification.

The qualifications required to work in each type of childcare setting are regulated by either the Care Council for Wales or Skills Active. Their published documents give a comprehensive list of past and present qualifications which are required by anyone wishing to work within the childcare sector.

Within the CSSIW SASS data capture, all those who stated which qualification level they had, were also asked whether the qualification was on either of the above lists.
444 respondents stated that their qualification was on a list, however of concern is the fact that only 9 people stated that their qualification was on the Care Council for Wales qualification list. 435 stated 'Unknown'.
109 respondents stated that their qualification was not on either list with a further 34 not specifying.

It has to be questioned whether the question was completely understood by everyone and that it is just an administrative error in not knowing at the time what the name of the qualifications list was.
However it is extremely concerning that so few respondents are aware of the legal qualifications lists for childcare workers.

The following table shows the number of childcare workers whose mandatory training certificates expire in the next 12 months or 2 years.
Once again, questions have to raised regarding the validity of this data as there was no continuity in this part of the SASS form (i.e one section asked for date of expiry whilst the other asked for date of completion) this appears to have caused confusion in the data that has been submitted therefore the following table should be used as a guide rather than being definitive.

Childcare Type	Certificates due to expire in next 12 months			Certificates due to expire in next 2 years		
	Paediatric First Aid Certificate	Child Protection Training	Food Hygiene Training	Paediatric First Aid Certificate	Child Protection Training	Food Hygiene Training
Childminder	35	33	23	41	15	20
Full Day Care	129	103	83	102	94	96
Sessional Day Care	69	57	53	75	75	65
Out of School Care	21	19	5	14	13	29

A comprehensive range of both mandatory and CPD training courses are provided annually by Gwynedd Council to ensure all training needs are met. However childcare settings must take more responsibility for ensuring that they are fully aware of when their mandatory training certificates expire and book onto courses in due time.

14. Results of Consultation with Stakeholders

Consultation was undertaken with a range of key stakeholders, the findings are summarised below:

Wellbeing Needs Assessment
The CSA has been aligned closely with the Local Well-being Needs Assessment with the same areas being used for both. Population data for the Local Well-being Needs Assessment has been included in the CSA to ensure consistency of information. Responses received to the Well-being Needs Assessment consultation have been analysed with the following findings relating to childcare:
Area 1 (Bangor)
In response to question 4 - Note up to 3 things in your area that improve well-being and contribute towards your quality of life:
2 people noted 'Living in a Flying Start scheme area'

Area 2 (Caernarfon)
In response to question 2 – Note up to 3 things that makes your area a nice place to live:
2 people noted 'The Cylch Meithrin is welcoming and good'

The Welsh language was highlighted in the responses in all the Areas, showing how important it is to the people of Gwynedd's feeling of well-being. Ensuring sufficient Welsh language childcare provision is therefore a priority.

Department of Works and Pension
Consultation was undertaken with PaCE Parent Employment Advisors in Gwynedd as they work closely with parents where childcare is their main barrier to accessing training or job opportunities.
The following comments were noted:
"They is a lack of childcare in Dolgellau area in general. Only nursery is out of town.
Very few registered childminders and from speaking with potential new childminders, many would not be able to do it due to a stipulation in their rent agreement.
In general I am finding in Meirionnydd that there is very little in terms of childcare for older children i.e. age 8 plus. This is certainly an issue over the summer holidays for many parents who find there is plenty of work out there but they cannot find childcare for older children".

Safeguarding Children's Board
Details on the number of looked after children and children on the child protection register were received, there were no further comments received regarding the sufficiency of childcare in the county.

Local Authority Departments
Research and Analytics Department: The Senior Research and Analytics Officer conducted and analysed all the data from the online Parental Survey, and also provided much of the Population data. Their work on the Well-being Needs Assessment also ensured continuity of information across both reports.

Education Department: The Early Years Unit has always worked closely with the Education Department with regards to the Early Years Education funding and have ensured sufficient non-maintained settings to meet the needs of parents across the county. Close collaborative working has been highlighted as essential as we go forward with regards to new 21st Century Schools provision and the need for high quality childcare on site.

Family Information Service (Gwynedd-Ni): although the FIS has seen major cutbacks in recent years they work closely with the Early Years Unit to ensure information for parents is as detailed and up to date as possible. Work to promote Gwynedd-Ni will be essential in the short and long term to ensure that parents know where to access information on childcare in the county.

Planning Department: the planning department has worked closely with the Early Years Unit in the past when changes were made to childminder registration numbers. They are aware of the need for further childcare developments in rural areas and the requirement to work closely with the Early Years Unit.
The areas where most new developments are currently being undertaken are Area 1(Bangor) and Area 2(Caernarfon), these are also the areas with the greatest availability of childcare settings. Collaboration between the Planning Department, Education Department and the Early Years Unit ensures that childcare and Early Years education places are sufficient to meet the needs of new parents to the area.

Children
Questionnaires were sent via the Clybiau Plant Cymru Kid's Club Business Development Officer to all the After School Clubs in December 2016. Children in years 4, 5 and 6 were asked to complete the questionnaire giving their views on their club, what they liked about it and whether they would like to attend an after school club when they reached secondary school.
17 questionnaires were completed, 7 boys and 10 girls ranging in age from 7 to 11 years of age.
The vast majority only attended an after school club on 1 or 2 days of the week, and 16 of those that responded stated that they

attended due to their mother/father working.

12 of the children stated that they enjoyed attending, with the remaining 5 stating it was 'ok'.

When asked if they would be happy to attend an after school club in secondary school, 7 said 'Yes' , 1 said 'Maybe' and the remaining 9 said that they would not like to attend, reasons given were: too big, probably old enough to walk on my own, I like it here, because I would be able to go on a bus, because I would want to revise.

The children were also asked what activities they would like to have access to at a club. Playing, gymnastics, football, gardening, rugby, wii/playstation/Xbox, arts and crafts, dodge ball and just chilling were the most popular suggestions.

Primary School Head teachers

A questionnaire was sent to all primary school head teachers in December 2016, 26 responses were received from across the whole county

Question 1: Do you have childcare operating on your school site at present?

Free Breakfast Club – 21

After School Club – 11

Cylch Meithrin – 9

Wraparound – 5

Holiday Club – 4

Flying Start Setting – 2

Question 2: Are you aware of any local childcare providers who collect children from your school?

Childminder – 15

Nursery – 14

After School Club – 4

Cylch Meithrin - 1

Taid & Nain – 1

Question 3: In your view, is there sufficient childcare available locally to meet the needs of the families who attend your school?

Yes – 11

No – 8

Don't know – 7

Comments received: parents need someone to care for their child for 1 or 2 hours, nurseries are expensive and expect a full days payment.

Question 4: Have parents contacted you in regards to childcare?

Yes – 11

No – 14

Don't know – 1

Comments received: a number of families have asked about 'wraparound' provision and if there are plans to offer it at the school; parents are keen to establish a Cylch Meithrin but we have had no response from Mudiad Meithrin; the school use to have an after school club until September 2016 when it had to close due to staffing and financial issues, many parents were unhappy about this.

Question 5: Do you have space in your school were a new childcare setting could be developed?

Yes – 12

No – 10

Don't know – 4

Comments received: I have considered starting an after school club in the hall; depends on the time of day there is space available after school; in the process of working with the Cylch Meithrin to provide space for them; there is a suitable yard on site to locate a cabin for wraparound provision.

Question 6: In terms of affordability of childcare, what is the likelihood that families would want the childcare if it was offered?

Comments received: I think a number of parents would be interested; families would definitely benefit from wraparound provision; it would depend on the cost; family and friends are the ones who offer most of the childcare for this school, it is a very close community with everyone supporting each other; this is a disadvantaged area and a large number of parents have seasonal work on low wages, I am confident that they would welcome if there were affordable childcare opportunities available locally.

Employers

Responses were only received from 2 employers in Gwynedd. One was the Local Authority which employs 5994 members of staff, and the other was a holiday park which employs 400 members of staff.

Both employers offer - flexible working hours, job sharing and school term time hours, with the Local Authority also offering shift work, working from home and phased return to work.

Childcare is not considered an issue by the local authority in regards to recruitment and retention of staff and they offer a childcare voucher scheme.

Childcare partly affects recruitment and retention in the holiday park with affordability being the biggest issue. They are however sending out a questionnaire to all their staff to identify if there is enough demand for them to open an on-site day care nursery which will meet the childcare needs of their staff.

CWLWM (Umbrella Organisations)

Mudiad Meithrin

The following were rated as Good: quality of provision, affordability and Welsh language / bilingual provision

The following were rated as Satisfactory: range of providers, number of places suitability of opening times and location and accessibility of childcare.

The following were rated as Poor: flexibility of provision and sessions.

Mudiad Meithrin noted that there is more choice of provision in the larger towns, but due to the rural nature of the county there is very little if any choice in some areas such as the Llŷn Peninsula and Meirionnydd.

In general fees are reasonable, maybe too low in sessional care. Quality in general is good due to all the input into suitable training, grants and joint working between agencies working in the county.

Suggestions for improvements for the following groups were as follows:

Families on low incomes – it is important that these families are aware of their rights to free Early Years Education for 3 year olds, and for Flying Start if they live in the designated areas

Families with children with disabilities – suitable training for childcare staff, up to date information regarding any grant funding which is available, more money available to support those that require 1-1 care.

Working families – encourage childcare settings to open for longer hours, encourage more wraparound provision, more joint working between childcare providers.

Families seeking work – direct them to specific schemes that support parents to return to work

PACEY Cymru

PACEY Cymru believe that Gwynedd recognises the importance of childminders in supporting the delivery of sufficient, accessible and quality childcare services for families across the local authority, including providing unsocial hours for working parents. There are a range of ways that childminders have been supported locally in this aim.

Pre-registration support: PACEY Cymru are funded to provide some pre-registration childminder support services in Gwynedd.

PACEY Cymru understands that support for registered and pre-registration childminders in Gwynedd includes: briefing sessions, subsidised access to the CYPOP5, paediatric first aid and support and guidance from the Childcare Development Officer.

Gwynedd also currently provide new childminders with the PACEY Quality Start package to support them during their first year.

New childminder settings are also able to apply for start-up grant support up to the value of £200 towards essential health and safety items. An additional £100 is available to support Welsh language development, or to support new settings establishing in the priority areas for childcare development which have been identified in the Childcare Sufficiency Assessment.

Through this and other work PACEY Cymru believe Gwynedd are working to encourage sufficient, accessible and quality childcare services for families across the local authority. This can contribute towards childcare offering unsocial hours for working parents, and meeting the needs of families locally.

In line with current developments around Tax Free Childcare (UK Government) and the 30 hour childcare offer (Welsh Government) PACEY Cymru would like to highlight the continued need by Gwynedd Local Authority to ensure the continued promotion of the importance of using registered childcare. The outcome of which will support affordability for families and sustainability of existing childcare settings.

No childminders are currently funded to provide Foundation Phase education or Flying Start childcare in Gwynedd. PACEY Cymru firmly believes that opportunities to access funding for Flying Start and Foundation Phase for childminding settings should be considered by Gwynedd Local Authority, if settings meet defined criteria.

Clybiau Plant Cymru Kids' Clubs

Clybiau Plant Cymru Kids' Clubs felt unable to provide a response specific to Gwynedd, but general comments for the whole of Wales included:

Continued funding is required to sustain current and create, where needed, new out of school childcare provision is an ongoing need to ensure sufficiency. In particular, continuation of the Out of School Childcare Grant post April 2017. This would also allow continued support to help childcare clubs become registered to support quality, affordability and sustainability.

We know that generally across Wales there is a need to sustain existing out of school childcare and in many counties there is still a need to increase out of school childcare particularly during holiday time and for older children (once they enter secondary school).

Affordability of holiday care in particular remains a significant challenge for families. Anecdotally, many of our holiday clubs have reduced the number of days or the number of school holidays they run, expressing that they would open for longer with parental demand. We think that parents need holiday clubs, but not at the fees they are offered. However, with staff working all day long, holiday clubs are expensive to run and fees need to also be sustainable.

In a recent survey conducted by Clybiau Plant Cymru Kids' Clubs across Wales:

35% of parents wished to access more holiday care.

17% of parents said that cost was a barrier to them accessing more childcare.

30% of parents said that suitable holiday care was not available to them.

Suggestions for improvements for the following groups were as follows:

Families on low incomes – support settings to register with CSSIW thus allowing parents to access tax credits / universal credits and soon to be introduced Tax Free Childcare. Sufficient funding to be made available for an Assisted Places scheme in each county. Making public resources, such as schools and community buildings available at a reasonable rate can make Out of School

Clubs more sustainable and affordable for low income families.

Families with children with disabilities – cutbacks have seen provision for children with additional needs reduced over the last few years. Often childcare settings lack the confidence to care for children with additional needs, specialised training for staff would make them feel sufficiently informed and competent.

Working families – Childcare has to be accessible, affordable and flexible to meet parental/carer needs but often this is a balancing act as the childcare setting needs to maintain sustainability.

Families seeking work – all clubs need help to gain CSSIW registration to allow parents to access help with childcare costs.

WalesPPA

Wales PPA is fortunate to receive funding from the local authority to be able to visit and give one to one support to members.

Wales PPA also employs a Welsh language coordinator and Foundation Phase coordinator both funded by Welsh Government, who work across Wales to help drive improvements in quality.

Suggestions for improvements for the following groups were as follows:

Families on low incomes – The Welsh Government's childcare offer will, when rolled out, help to tackle poverty especially for those who experience "in-work" poverty across the whole of Wales.

Funds for assisted places are limited and therefore need to be prioritised and may result in some children missing much needed opportunities for socialising and learning through play.

For providers, more support could be offered to help practitioners understand and support specific needs of low income families.

Families with children with disabilities- this is an area of concern as it appears that children who need 1-1 support are not currently always able to access this support. Practitioners will always need support and training so that they can optimise the opportunities for children with disabilities.

Working families – those working over 16 hours should benefit from the proposed 30 hours childcare offer.

Families seeking work – the PaCE project will help by paying for childcare while parents are in training or seeking work.

NDNA

The following were rated as good: quality of provision, range of providers, suitability of opening times, location and accessibility of childcare.

The following were rated as satisfactory: affordability and flexibility of provision and sessions.

The following were rated as poor: Welsh language / bilingual provision. (NDNA have been asked to further substantiate this rating)

NDNA noted that they used secondary data available from CSSIW and Estyn websites for their consultation response.

A survey by the NDNA revealed that childcare providers in Wales are struggling to stay in business due to increased costs and fewer children taking up places, in particular they noted that the new National Living Wage will result in a 13% rise in payroll costs. NDNA hopes that working families and families on low incomes will be supported by the Welsh Government 30 hour childcare offer.

15. Gap Analysis & Areas for Improvement

Data from the CSSIW Self Assessment of Service Statements (SASS) has been used to provide details on the supply of childcare within Gwynedd. All providers were required to complete their SASS during July 2016 (term time) and August 2016 (school holidays), however as only 81% of childcare settings completed their SASS this does not give us a complete picture of the supply of childcare in the county.

Were possible data from Gwynedd-Ni (Family Information Service) and local knowledge have been used to supplement the SASS data.

Types and Location of Childcare Available

There is a very uneven distribution of all childcare providers across Gwynedd, however this is also the case with regards to the population as a whole.

Areas 1 & 2 (Bangor & Caernarfon) have the greatest supply of all childcare types and these are also the most densely populated areas in the county.

There is a limited supply and therefore choice of childcare in rural parts of Area 3 (Llŷn), Area 4 (Porthmadog), Area 5 (Ffestiniog), Area 6 (Dolgellau), Area 7 (Penllyn) and Area 8 (Tywyn).

However due to the limited population it would have to be questioned whether it is feasible and sustainable to operate a childcare service in these rural areas.

Childminding would be the best option for childcare in these rural areas.

There is only a limited supply of holiday clubs and holiday playschemes and they are not available in all areas of Gwynedd. Again sustainability would have to be questioned for any new holiday childcare provision especially in the rural areas. Extensive feasibility studies would have to be carried out to ensure enough parental support before any new holiday provision could be established, however the introduction of the Welsh Government 30 hours childcare offer will likely increase demand for holiday provision.

Data from the parent survey shows a demand for Open Access Play Provision and Nannies both during term time and holidays. There was no SASS data for either of these types of childcare and very little local knowledge.

There is a good supply of Sessional Care settings across the county, with the vast majority also being Early Years Education Providers. Responses to the short provider questionnaire indicate that many have concerns regarding their future sustainability both due to the cuts in their funding and fewer children attending. Working parents find sessional care the most difficult to use as it does not meet their requirements.

There are few primary schools that do not operate a free breakfast club on site.

Areas for Improvement:

- *There needs to be an increase in the number of childminders in rural areas.*
- *Feasibility studies need to be carried out in areas without holiday provision to ascertain if there is enough parental support both in the short and long term.*
- *More information is required regarding nannies working in Gwynedd, and also encouraging new nannies to register on the Voluntary Approval List*

Age of Children for whom Childcare is Available

The childcare that is available in Gwynedd is able to accommodate a range of ages, with the 0 – 8 age group having the greatest choice.

No full day care settings noted that they care for children above 11 years of age, and no respondents to the parental online survey stated that they required childcare for children aged over 11 years.

Childcare settings are flexible and would accommodate older children if there was demand.

There are no significant areas for improvement.

Affordability of Childcare

Affordability is highlighted by parents and stakeholders as a barrier to using childcare, with many parents relying on family or friends.

However many childcare settings are facing sustainability issues due to rising costs.

There are some unregistered out of school clubs and Cylchoedd Meithrin therefore parents are unable to access tax credits to pay their fees.

Awareness and take up of financial support that is available is very low in Gwynedd.

Areas for Improvement:

- *Register unregistered providers by offering business support and start up grants*
- *Promotion of the availability of the childcare element of working tax credit, universal credit and tax free childcare to encourage greater uptake by parents who are eligible.*

Times at which Childcare is Available

There is a vast range of different opening and closing times across all the childcare providers.

Childminders and Full Day Nurseries operate the longest opening hours with the majority open by 8a.m. and many opening before 7:30am daily. The majority are open until 6pm.

Only one day nursery and one childminder stated that they offered a weekend service.

No Sessional Care settings are open before 8:40am and 3:45pm is the latest closing time.

35 parents who completed the online survey stated that childcare was not available at the times they needed it, with availability after 6pm and on weekends the most required.

Areas for Improvement:

- *Offer financial incentives to encourage existing childcare providers to extend opening hours and provide childcare to suit shift workers*

Welsh Medium Childcare Provision

The supply of Welsh medium or Bilingual Childcare is very good across the whole County.

According to the CSSIW SASS data:-

96% of Full Day Care provision is either Welsh language or bilingual.

98% of Sessional Day Care is either Welsh language or bilingual.

100% of Out of School Care is either Welsh language or bilingual.

85% of Childminders are either Welsh language or bilingual.

No parents who completed the online survey stated that they could not find suitable Welsh language childcare.

Tywyn and Bangor well-being areas have less Welsh language provision which corresponds with the percentage of Welsh speakers with the areas.

Areas for Improvement:

- *Offer training to increase and upskill childcare staff in the Welsh language.*

16. Childcare Sufficiency Assessment –Action Plan

The Action Plan must detail the actions, priorities and milestones to maintain strengths and address shortcomings identified in the Childcare Sufficiency Assessment.
The tables below identify those areas which must inform the assessment as per the statutory guidance.

Assessment of Demand and Supply
Due to the new childcare offer for 3 and 4 year olds and Gwynedd working in partnership with Anglesey to be an early adopter from September 2017 onwards, the main focus of the work for the next period will be developing quality childcare infrastructure to supply the new demand for childcare and to ensure the stability of Flying Start and Early Years Foundation phase within its development. Obvious barriers in Gwynedd will be holiday provision.

Analysis of supply and demand of overall childcare provision

Category	Strengths	Weaknesses	Actions	Milestones
Type and location of available childcare eg full day care, sessional care, after school care, childminder	Sufficient childcare of all types in Areas 1 & 2	Limited supply and choice within rural parts of other wellbeing areas	• Fit for the offer workshops – business support to correspond with new offer • Increase childminding providers in rural areas • Holiday provision feasibility study • Dialogue and raise awareness with Education department regarding out of school, wraparound and holiday clubs. Conduct a feasibility of school located childcare provision and identify barriers to expand provision on site and to other school sites. • Childcare start up grants • Workforce development	Sept 2017 – delivery in pilot areas for 30 hrs

Affordable childcare	Range of costs across county Assisted places funding available through LA Sufficient Flying Start and Foundation Phase – non maintained provision on offer in Gwynedd	Parents unclear of the help available to support funding of childcare. Number of unregistered childcare settings that parents can't access financial support. Number of parents unaware of free Early Years Education entitlement.	• Up to date information on childcare options and financial support available. • Raise awareness of FIS through media and other marketing strategies. • Register unregistered providers by offering business support and start up grants. • Liaise strategically with WG and Cwlwm partners to ensure sustainable childcare fees for Flying Start, Early Years and 30 hr offer. • Analyse data from the Alma Economics survey	
Times at which childcare is available, including the need for flexible childcare catering for irregular patterns of usage across the day, the week and the year;	Most full day care settings and childminders offer a flexible service to parents and most are open before 8 a.m.	Sessional day care in general does not meet the needs of working parents. Limited providers opening their service on the weekend or after 6p.m therefore not suitable for shift workers. Limited availability of childcare in all school holidays.	• Offer financial incentives to encourage existing childcare to extend opening hours and provide childcare to suit shift workers. • Increase childminding providers in rural areas • Holiday provision feasibility study and increase providers	

| Welsh medium childcare provision | Sufficient Welsh medium childcare of all types in all areas of Gwynedd | Tywyn and Bangor wellbeing areas have less Welsh language provision which corresponds with the percentage of Welsh speakers with the area. | Offer training to increase and upskill childcare staff in the Welsh Language. Target grant incentives to offer a bilingual service. | |

Issues facing specific categories of parents in relation to availability of childcare provision

Category	Strengths	Weaknesses	Actions	Milestones
Working parents	Sufficient childcare availability in the Bangor and Caernarfon wellbeing areas.	Childcare not suited for shift workers. Limited supply and choice in rural areas.	• Offer financial incentives to encourage existing childcare to extend opening hours and provide childcare to suit shift workers. • Increase childminding providers in rural areas.	
Parents seeking work or training opportunities	PACE offers childcare support for Parents seeking employment and training	Affordability of childcare	• Up to date information on childcare options and financial support available. • Raise awareness of FIS through media and other marketing strategies.	
Unemployed households	Flying Start(six areas within Gwynedd) and Early Years entitlement available to unemployed. Childcare support for vulnerable families through TAF coordinated referrals.	Affordability of childcare	• Up to date information on childcare options and financial support available. • Raise awareness of FIS through media and other marketing strategies for parents to access information.	

Low income families	Flying Start(six areas within Gwynedd) and Early Years entitlement available to all families. Childcare support for vulnerable families through TAF coordinated referrals	Affordability of childcare	• Up to date information on childcare options and financial support available. • Raise awareness of FIS through media and other marketing strategies for parents to access information.	
Lone parent families	Flying Start(six areas within Gwynedd) and Early Years entitlement available to all families. Childcare support for vulnerable families through TAF coordinated referrals	Affordability of childcare	• Up to date information on childcare options and financial support available. • Raise awareness of FIS through media and other marketing strategies for parents to access information.	
Families from ethnic minority backgrounds	Low percentage of families from ethnic minority backgrounds living in Gwynedd and all childcare is inclusive. Flying Start (six areas within Gwynedd) and Early Years entitlement available to all. Childcare support for vulnerable families through TAF coordinated referrals.	Childcare not suited for shift workers. Limited supply and choice in rural areas.	• Up to date information on childcare options and financial support available • Raise awareness of FIS through media and other marketing strategies for parents to access information	

Families with children who have special educational needs or a disability	Extra hands funding provided for ALN children	No out of school provision at the Specialist schools within Gwynedd	• Liaise with multi agency partners in particular the Children's Specialist schools to establish a working group to identify and research the viability of establishing out of school childcare. • Review the present ALN provision jointly with Anglesey.	

Other issues to be reflected in action plan

Category	Strengths	Weaknesses	Actions	Milestones
Sustainability of childcare sector	Support from LA and Cwlwm partners regarding workforce development. Sustainability grants offered.	Increased costs – national min wage, pension, payroll costs, business rates, role of voluntary committees, rental costs etc.	Business support Continued subsided training from LA LA grant support Liaise strategically with WG and Cwlwm partners to ensure sustainable childcare fees for Flying Start, Early Years and 30 hr offer.	
Cross Border arrangements	Out of county parents access childcare in Gwynedd but not subsidised by Gwynedd LA	No arrangements in place to fund Early Years Foundation Phase.	Setting a Gwynedd and Anglesey Childcare Support Unit. Setting up a cross county strategic childcare group. Feasibility study of cross border arrangements regarding Early Years to be conducted. Discussion regarding cross border payments with Early Years and Childcare offer. Cross border commissioning for workforce development & childcare support.	

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Workforce Development and Training	LA offer extensive mandatory and CPD training for the early years and childcare workforce of Gwynedd. LA commission training with Umbrella organisations. Gwynedd has a high level of qualified staff Good working partnership with local colleges.	SASS questionnaires noted that childcare providers were unaware of the qualifications framework- Care Council for Wales/ Skills Active	Cross border commissioning. Raise awareness of legal qualification framework with childcare providers Liaise with umbrella organisations to audit workforce development needs for the future. Update new electronic database with staffing qualifications.	
Partnership Working	Cwlwm partners noted a good working partnership with Gwynedd Council which support the childcare sector locally. Quality in general is good due to all the input into suitable training, grants and joint working between agencies working in the county. The Early Years Unit has always worked closely with the Education	Not all Cwlwm partners attend childcare development group meetings	Setting up a cross county strategic childcare group Work closely with Economy and Community Development Department regarding supporting the development of new childcare providers Collaborative working with 21st century schools programme.	

	Department with regards to the Early Years Education funding and have ensured sufficient non-maintained settings to meet the needs of parents across the county.			