

APPENDIX 1



Directorate of Education and Lifelong Learning
Cyfadran Addysg a Dysgu Gydol Oes

Caerphilly County Borough Council
Childcare Sufficiency Assessment

Summary Report

April 2014



Gwasanaeth Gwybodaeth I Deuluoedd
Family Information Service

1.1 Introduction

The Caerphilly Childcare Sufficiency Assessment is a report that brings together a range of different data and information to develop a picture of the current childcare market and to identify whether there are any gaps in supply. As a result of the assessment, an action plan will be drawn up to address any identified insufficiencies.

1.2 Overview

The Childcare Act, 2006, underpins the Welsh Government's current Childcare Plan, Building a Brighter Future, and sets out the statutory basis for:

- Parents' legitimate expectation of accessible high quality childcare for children and their families; and
- Local Authorities' responsibilities for providing information to parents and prospective parents to support them in their parenting role.

In Wales, The Childcare Act sets out to achieve these aims by placing a duty giving Local Authorities the lead role in facilitating the childcare market to ensure it meets the needs of working parents; in particular those on low incomes, those with disabled children and those wishing for their children to attend Welsh medium provision. In addition, it looks to support the childcare needs of those in training and those seeking work.

Section 26 of The Childcare Act requires Local Authorities in Wales to prepare assessments of the sufficiency of childcare in their area as a necessary first step towards securing sufficient provision and establish plans to address any gaps identified.

The following are the areas where potential gaps may be found:

- ◆ **Income Gaps or Affordability** – where there is a shortage of affordable childcare for income groups populating an area.
- ◆ **Specific Needs Gaps** – where there is a shortage of suitable places for children with disabilities, or children with other specific needs or requirements.
- ◆ **Time Gaps** – where there is a shortage of specific childcare at a time that parents would wish to use childcare.
- ◆ **Age Gaps** – where there is a shortage of childcare suitable to meet the needs and requirements of a certain age group.
- ◆ **Type Gaps** – where there is a shortage in the type of childcare for which parents may be expressing a preference.
- ◆ **Geographical Gaps** – where a geographical area has a general shortage of supply

It is also important to look into gaps in provision for:

- ◆ Childcare for those who receive or may require childcare in the Welsh language/bilingual provision.
- ◆ Childcare provision for children and young people from working families or families seeking work.

In addition the information will support and inform the development of other Local Authority plans and programmes including Flying Start, Early Years Education, Families First, the Welsh Education Strategic Plans and the Single Integrated Plan.

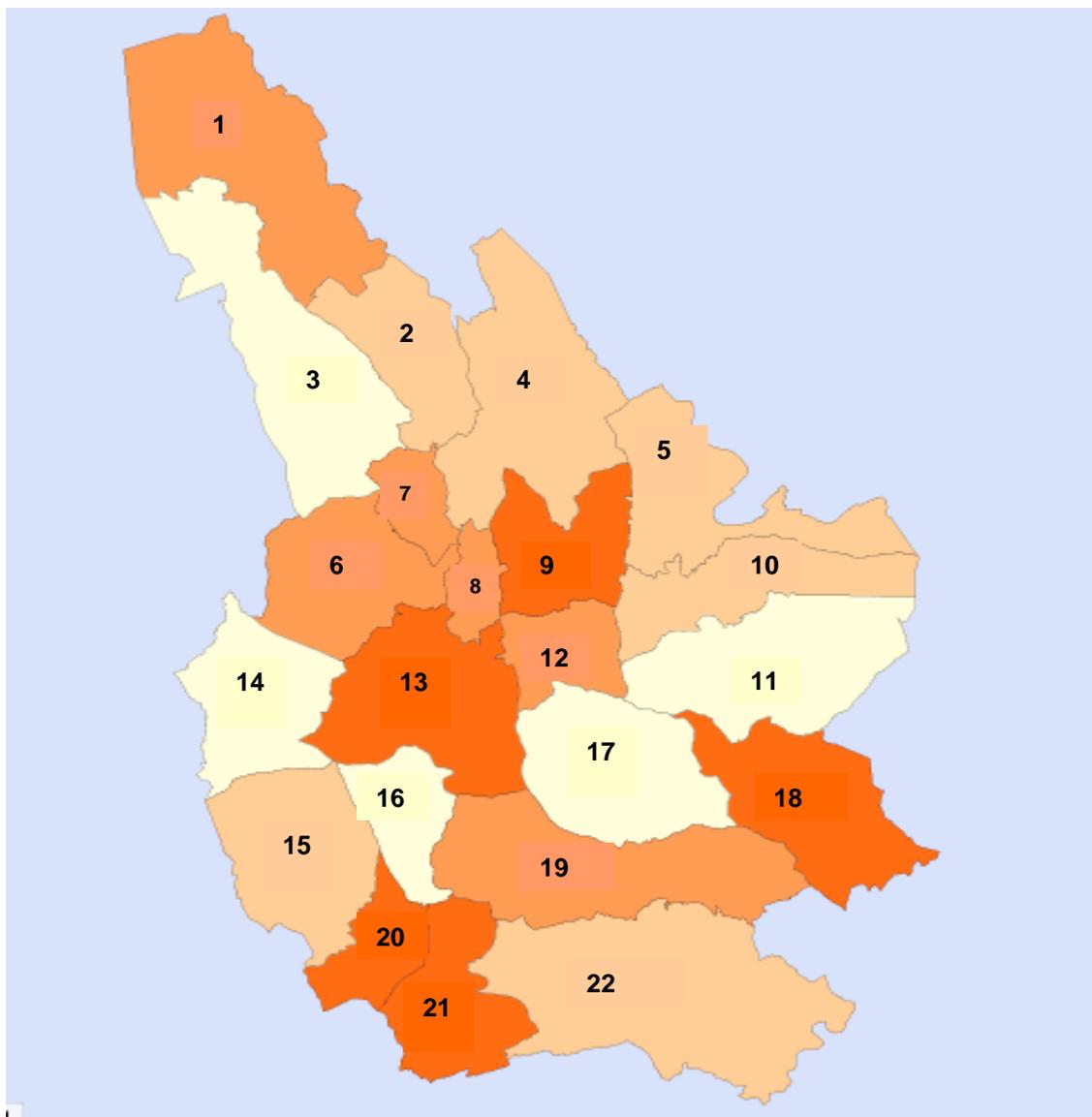
1.3 Evidence

Evidence for the gap analysis is drawn from five separate reports, which seek to profile various aspects of the childcare market in Caerphilly:

- ◆ **Analysis of factors affecting demand and the ability to pay for childcare.** This is based on a number of data sets, including data from the Census 2011, and presents a range of demographic and socio-economic indicators that may affect either the demand or the ability to pay for childcare.
- ◆ **Analysis of the supply of childcare.** This presents an analysis of the supply of registered and unregistered childcare in Caerphilly collected by the Family Information Service (FIS) in a snapshot of supply taken on August 31st 2013. This information includes: number and types of places, number of children per place and type of place, opening times, fees and vacancies. It also includes a separate section on the future plans of childcare providers and an analysis of enquiries made to the Caerphilly FIS.
- ◆ **Measurement of Relative Supply.** This report applies a formula ('The Rochdale Formula') to attempt to understand where the key gaps and pressure points exist, with a specific focus on the number of places required to secure sufficient places for working families.
- ◆ **Consultation with Stakeholders on Childcare.** Focusing on the level of demand for childcare and the improvements needed, this report includes a detailed analysis of results from a questionnaire distributed to parents/carers in Caerphilly over the summer 2013. It also presents an analysis of focus groups held with parents/carers of children with disabilities, those requiring Welsh medium childcare, children and childcare providers. There are also the results of the consultation with employers and a consultation with children who attend After School Provision.
- ◆ **Geographic Gaps Analysis.** A profile of each ward/ward cluster or sub local authority area, including local demographics, local knowledge and geographic situation. This section also includes information about current childcare developments.

1.4 Caerphilly Childcare Sufficiency Boundaries

For the purposes of the CSA, the county borough has been organised into 22 localities either by ward or by a cluster of wards as shown below.



1	Twyn Carno, Moriah & Pontlottyn	12	Pontllanfraith
2	New Tredegar	13	Ystrad Mynach, Maesycwmmmer & Hengoed
3	Darren Valley	14	Nelson
4	Argoed & Aberbargoed	15	Aber Valley
5	Crumlin	16	Llanbradach
6	St Cattwg	17	Ynysddu
7	Bargoed & Gilfach	18	Crosskeys & Risca
8	Pengam & Cefn Fforest	19	Bedwas, Trethomas & Machen
9	Blackwood & Penmaen	20	Penyrheol
10	Newbridge	21	St Martins & Morgan Jones
11	Abercarn	22	St James

2. The Supply of Childcare

There are 253 childcare settings registered with Care and Social Services Inspectorate for Wales (CSSIW) in Caerphilly. Within these settings, 313 childcare services are provided. The figure includes the following types of childcare provision as they are defined by CSSIW :

- 30 After School Clubs
- 14 Breakfast Clubs
- 146 Childminders
- 16 Day Nurseries
- 23 Flying Start settings
- 20 Holiday Clubs
- 34 Playgroups
- 30 Wrap Around settings

In addition, there are 35 unregistered settings including:

- 14 After School Clubs
- 11 Childminders (currently not offering childcare)
- 1 Day nursery (parents remain on site)
- 3 holiday clubs
- 2 playgroups
- 2 play schemes
- 2 wrap around settings

Together these settings offer 4,616 registered childcare places across the borough. However, when the number of places that are actually offered by the childcare providers is calculated this figure rises to 5,300 places. This might be because a day nursery is registered for 50 places, but within that 50 they offer 5 breakfast club places, 5 wrap around places and 5 after school places, totalling 65 places actually offered.

Number of Childcare Places by Locality and Provider Type

The following table shows the number of childcare places by type across the county borough (as at 31/8/13). Childcare places are fairly evenly spread except for holiday provision. Number of places for 11 – 14 year olds in Chill Zones is also not shown here.

The total number of places delivered through the medium of Welsh and Bilingually differs between localities too with some areas providing a far greater number of Welsh medium/bilingual places than others. In total there are 860 places (16.1%) delivered through the medium of Welsh, 119 places (2.2%) offered through the medium of Welsh with English and 382 places (7.15) offered bilingually. This compares to 2,686 places (50.3%) offered through the medium of English with some Welsh and 1,292 (24.2%) offered in purely English medium settings.

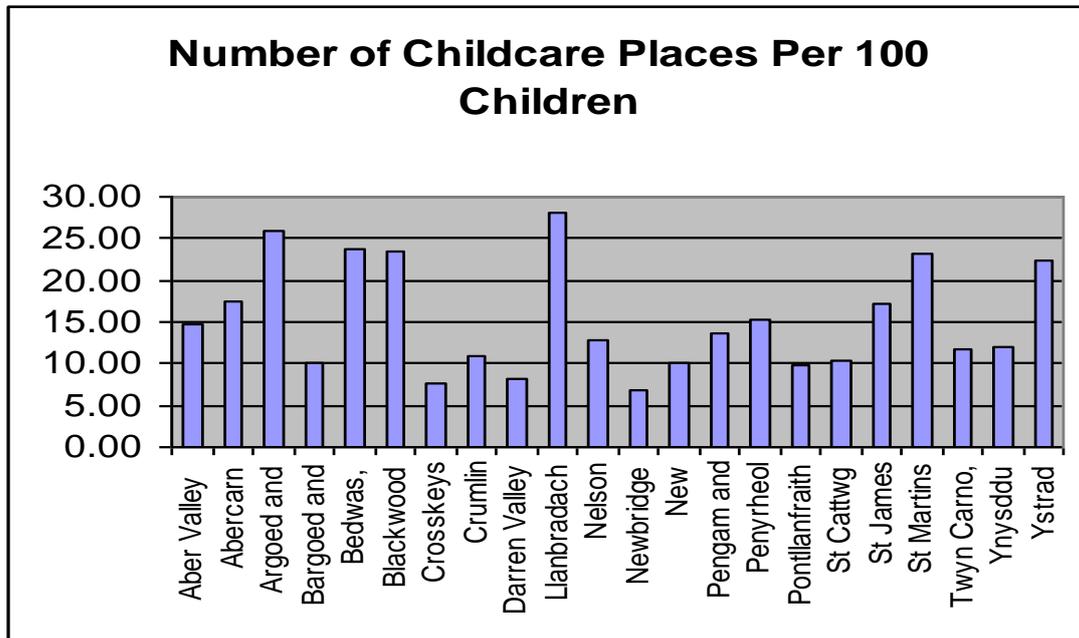
The total number of places available differs between term time and during school holidays. While there are 324 settings operational during term time, this drops to 198 during school holidays. The settings offering childcare during school holidays include day nurseries, childminders, holiday clubs and playschemes. The number of places available during term time is 4,768, which drops to 2,379 during the school holidays. Not all of these childcare places can be accessed by all age groups.

Figure 1: Number of childcare places by locality and provider type

	After School Club	Breakfast Club	Childminder	Day Nursery	Flying Start	Holiday Club	Play Scheme	Playgroup	Wrap Around	Total
Aber Valley	35		40		3			66	68	212
Abercarn	27		7	55				32	56	177
Argoed/ Aberbargoed	37	5	49	80	17	35		54	24	301
Bargoed Gilfach			56		58			12	14	140
Bedwas, Trethomas, Machen	72	26	93	131	69	14		86		485
Blackwood Penmaen	99	8	190	64		102		93	36	592
Crosskeys Risca			105		13			42	20	180
Crumlin	24		62					24		110
Darren Valley					40					40
Llanbradach	35	8	30	47		8		48	50	226
Nelson		4	18	35				45		102
New Tredegar	16		10		24			19	25	94
Newbridge			9		32			12	24	77
Pengam Cefn Fforest	27	24	55	12		24		20	40	202
Penyrheol	120		59	40		72	60		48	399
Pontllanfraith	32		76					14	32	154
St Cattwg	7		21	28		1		60	31	148
St James	44	5	24	44	80	4				201
St Martins Morgan Jones	114	72	69	65		88	50	79	80	617
Twyn Carno, Moriah Pontlottyn	4		22	20	121	4		10		181
Ynysddu	11	1		44		6		10	12	84
Ystrad Mynach Maesycwmmwr Hengoed	99	15	62	125	52	64		59	78	554
Total	803	162	1057	790	509	422	110	785	662	

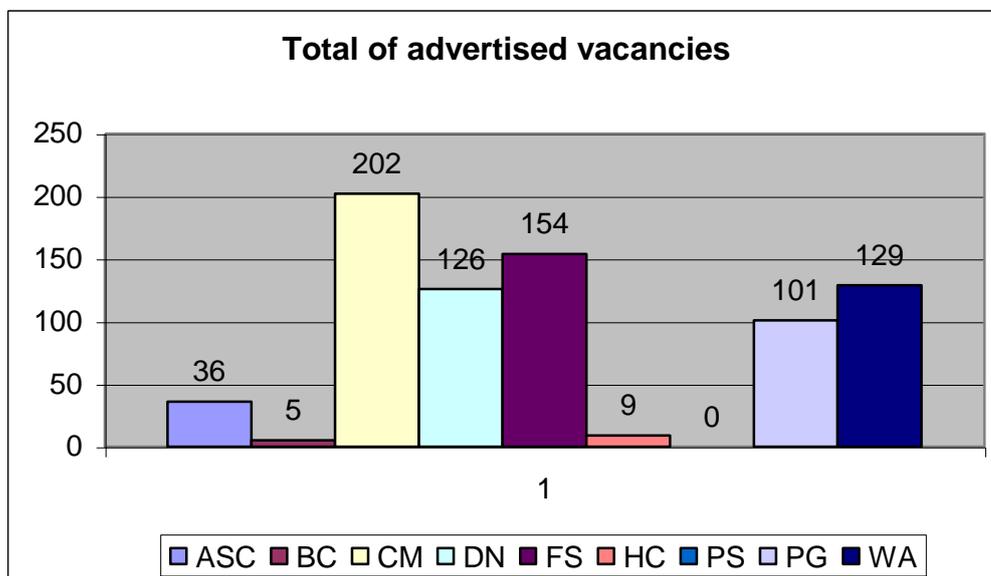
In order to gain a more accurate picture of sufficiency of childcare places by locality, the availability of places offered must be considered alongside the

child population aged between 0 – 14 of each locality. Below is a table showing number of places per 100 children for each locality.



The table clearly shows that some areas have a high level of childcare places, such as Llanbradach, St Martins/Morgan Jones and Argoed/Aberbargoed, while other areas have very little childcare provision for their child population, such as the Crosskeys/Risca, Newbridge and Darren Valley areas. In turn other factors must be considered for each locality such as the age range that the available childcare caters for, the language of the provision and the economic make up of the area along with parental choice.

Vacancy rates are another good indicator of the requirement of childcare availability and take up for parents in work, in training or seeking work. In total, in August 2013, there were 5300 childcare places offered across the county borough. Of these, there were 762 vacancies reported to the FIS. This equates to a vacancy rate of 14.37%. Again, vacancy rates vary by locality. The following chart shows in which type of Childcare provision the vacancies are:



Childcare Availability by Locality.

Below is an out line of the supply of Childcare in each of the geographic areas identified in the CSA. A fuller description is given in the report 'Geographic Gaps Analysis'.

Aber Valley

There are a total of 212 places offered within the Aber Valley located in After School, Childminder, Flying Start, Playgroup and Wrap Around settings. 162 places are registered. Providers state that they currently have 167 occupied places and 31 vacancies. 91 places are available through the medium of Welsh, 0 Welsh/English, 56 Bilingual, 38 English Welsh and 27 English. Supply data shows there is a lack of places for the 11+ age group and that there are very few vacancies in the 0 – 2 and 5 – 7 age groups. The After School places are only available through the medium of Welsh and are all unregistered.

There are a relatively low number of places per 100 children at 14.72, however the Rochdale formula* suggests there is an oversupply of 29 places which takes into account the economic and demographic make up of the area. There is also going to be an expansion of the Flying Start programme in the near future which will have an impact on the childcare for 2 year olds.

The lack of places for the 11+ age group could be catered for in the local catchment Secondary School located in the Penyrheol ward where a Chill Zone is currently in development. No holiday club provision is shown, however, the local youth provision does offer some holiday provision for 11+ year olds.

Full day care is provided by childminders only, however, there is plenty of choice for full daycare in the neighbouring Caerphilly basin, which the majority of those travelling to work would pass through and could access easily. It is interesting to note that of those that responded to the Parental Survey from the Aber Valley there was the lowest percentage of parents using family and friends as childcare and the highest percentage of those using full day nursery. One childminder has since de-registered with a loss of 6 places.

This area has one of the highest densities of 5 – 7 year olds, and there are no reported vacancies for this age group, and again none through the medium of English.

With the new housing development, the introduction of the full Flying Start programme and the relatively low number of vacancies this area will need to be continually assessed in order to manage the childcare market effectively.

* **The Rochdale Formula** - A formula to calculate the number of childcare places that may be required or demanded by parents/carers in each ward/ward cluster. It takes into account the number of childcare places, the economic activity of the area and the number of children aged between 0 – 14.

Abercarn

There are a total of 177 places offered within the After School, Childminder, Day Nursery, Playgroup and Wrap Around settings. 199 places are registered but may not be offered. Providers state that they currently have 140 occupied places and 19 vacancies. 32 places are available through the medium of Welsh, 48 Welsh/English, 90 Bilingual, 4 English Welsh and 3 English.

The supply data shows that there is very little provision for the 5 – 10 age group and only 2 vacancies. There is very little holiday provision, although some is offered within the day nursery. The other holiday provision that is registered is through the medium of Welsh and although remains registered with CSSIW, is not currently offering any places.

The Rochdale formula suggests that there is a very small over supply of 8 places, however, this does not take into consideration that there are no English medium sessional playgroups or After Schools Clubs. This area also has a relatively high number of childcare places per 100 children at 17.46 (16.12 across Caerphilly). As this area has a major travel route between the middle of the county and Newport, and its demographics indicate a higher than average economic activity, it should be able to accommodate Full Day care as has been demonstrated by the siting of a new day nursery reporting very few vacancies.

Argoed/Aberbargoed

There are a total of 301 places offered within the After School Clubs, Breakfast Clubs, Childminder settings, Day Nursery, Flying Start, Holiday Clubs, Playgroups and Wrap Around settings. 235 of these places are registered. In addition there are 21 places for Early Years Education within the non-maintained sector. Providers state that they currently have 197 places occupied and 30 vacancies. 106 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 182 English Welsh and 37 English

This area boasts one of the highest number of places per 100 children at 24.08. The Rochdale formula would suggest that there is an over supply of 150+ places given its economic make up. However, part of this area is located at a cross roads between the upper part of the county and the economic centres of Blackwood and Ystrad Mynach as well as feeding upwards towards Merythr, Ebbw Vale and Tredegar and may supply childcare for parents travelling to work here.

The large day nursery is registered for 80 places but only currently offers 40 with only a few vacancies. The Flying Start programme has increased the numbers in a local playgroup and as such supply has seen an increase since the last CSA. These two provisions help to cater for the high proportion of 0 – 7's that this area has. It should be noted that all the sessional After School Provisions and Holiday Provisions is offered through the medium of Welsh.

Early Years Education places are offered both morning and afternoon in the Markham area offering an additional 21 places for 3 year olds.

Bargoed/Gilfach

There are a total of 140 places offered within the Childminder, Flying Start, Playgroup and Wrap Around settings. 126 places are registered. The local Cylch Meithrin offers Early Years Education places when there is parental demand. There is also a registered crèche in this area offering free provision for parents engaged with the Bridges into Work programme. Providers state that they currently have 73 occupied places and 38 vacancies. 24 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 77 English Welsh and 39 English.

The majority of the childcare offered in this area is either through childminders or Flying Start. In the main, the vacancies that are available are with childminders for the 0 - 2 year olds. There is no After School or Holiday provision and all childcare for older children is with childminders.

The Welsh medium playgroup offers both Early Years Education places and Flying Start places as well as offering a Wrap Around service for the school. The Cylch is in the process of relocating to another site where it is hoped it will be much more stable and sustainable. The English medium Wrap Around setting also offers spaces for playgroup and is located at the other end of this ward cluster. They are located within the confines of a school and are in the process of opening an After School Club.

A Welsh medium After School Club has been operational in the past, but has not proved to be sustainable. However, parents were keen to see the development of holiday provision in the Welsh Parents focus group. Further market research would have to be done to test the wider market.

Since the FIS Snapshot in August 2013, another childminder has registered in this area with an additional 5 places. The Rochdale formula suggests that there is an undersupply of 92 places (without taking Flying Start places into consideration), and with only 10.06 places per 100 children this is an area that could support more childcare, in particular because of the new shopping centre and further town centre regeneration that is underway. In addition, ASC and Holiday provision in the medium of Welsh could be further explored.

Bedwas/Trethomas/Machen

There are a total of 485 places offered within the After School Club, Breakfast Club, Childminder, Flying Start, Holiday Club, Playgroup and Wrap Around settings. 383 places are registered. In addition, there are 25 places for Early Years Education within the non-maintained sector across 3 settings in both morning and afternoon sessions. This has recently been reduced to 2 settings. Providers state that they currently have 399 occupied places and 96

vacancies. 0 places are available through the medium of Welsh, 8 Welsh/English, 0 Bilingual, 405 English Welsh and 72 English.

This area shows a good mixture of provision types varying from purely Flying Start childcare provision, to two full Day Nurseries, After School Clubs and Playgroups that offer a mixed economy of Flying Start, Early Years Education and Wrap Around.

The 2 day nurseries are located at the Caerphilly town end of the ward, supporting economically active parents from the local area and those travelling to work to and from Newport. One offers Early Years Education and has recently decided to operate more flexible sessions to suit parental demand.

There are After School Clubs at both ends of the ward as well as Wrap Around provision, however, FIS reported a client looking for an After School Club in the Graig y Rhacca area.

Since the FIS Snapshot in August 2013, another childminder has registered in this area with an additional 4 places and 2 other childminders are no longer operating with a loss of 6 places.

With 23.82 places per 100 children, this area seems well supplied with childcare places (Caerphilly average is 16.12). The Rochdale formula suggests there is an over-supply of 150+ places, and with 96 reported vacancies this may be the case. However, with the majority of childcare offered through the medium of English there is scope for the development of more Welsh medium provision.

Blackwood/Penmaen

There are a total of 592 places offered within After School Club, Breakfast Club, Childminder, Flying Start, Holiday, Playgroup and Wrap Around settings. 547 places are registered. In addition, there are 22 places for Early Years Education within the non-maintained sector across 3 settings in both morning and afternoon sessions. Providers state that they currently have 377 occupied places and 81 vacancies. 49 places are available through the medium of Welsh, 0 Welsh/English, 99 Bilingual, 206 English Welsh and 238 English.

This area has a good mix of provision in both English and Welsh medium. The Day nursery is bilingual. There is a good level of After School Provision which supports the large number of 5 and 6 year olds in this area. However, since the data was collated for this report, one ASC is no longer operating with a loss of 32 places.

There are a good number of childminders in the area offering flexible childcare. The one day nursery which also offers Early Years Education places, is a bilingual provision but is located a fair distance from the economic centre of Blackwood. They have reported only 12 vacancies.

With 23.58 places per 100 children, and the Rochdale Formula calculating an over-supply of 170+ places it would suggest there is sufficient childcare to support this area, although full day care could be further explored as an option in the Blackwood town area.

Crosskeys/Risca

There are a total of 180 places offered within the Childminder, Flying Start, Playgroup and Wrap Around settings. 127 places are registered. In addition, there are 16 places for Early Years Education within the non-maintained sector, across two settings. Providers state that they currently have 115 occupied places and 14 vacancies. 0 places are available through the medium of Welsh, 37 Welsh/English, 0 Bilingual, 88 English Welsh and 55 English.

This area has no group After School Provision except Wrap Around which usually ends at the end of the school day. An ASC was recently opened but shut due to poor location and not enough support. There are 2 After School Clubs (56 places) across the Newport border in Rogerstone, but typically After School Clubs's are linked to schools and would not really support Out of School places in this area.

Another Wrap Around is in the process of development at the Ty Sign school and an After School Club is investigating opening on a local school site where it will be better supported and more sustainable.

Both the local Cylch Meithrin and the local Playgroup offer a mixed economy of provision offering playgroup provision, Flying Start places and delivering Early Years Education. The data also shows there is a lack of provision for the over 8's.

All full day care is offered through 13 childminders who report only 14 vacancies between them. Various attempts at finding an appropriate venue for a full day care provision have been made, but to no avail. There is a flood risk from the river which has hampered planning in the past. Over the border in Newport there is one Full Day care provider (42 places) and an additional 21 Childminders (113 places) in the Rogerstone ward who could support the childcare needs of those parents travelling to work from this area. Since the FIS Snapshot in August 2013, another childminder has registered in this area with an additional 3 places.

There is also no fully Welsh provision as the local Cylch defines itself as Welsh/English and is known locally as both the Cylch and Playgroup.

As this is a major travel to work in Newport area, is the 2nd highest populated ward/ward cluster in the county, has a relatively high percentage of the population who are economically active and has one of the lowest numbers of childcare places per 100 children at 7.69 places, it is anticipated that this area can sustain additional childcare. In particular, After School Provision, holiday provision and group full day care. In addition, because there is a College in the area, the development of on-site crèche provision will be explored.

Crumlin

There are a total of 110 places offered within After School Club, Breakfast Club, Childminder and Playgroup settings. 76 places are registered. Providers state that they currently have 66 occupied places and 5 vacancies. 0 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 59 English Welsh and 51 English.

This area shows very little childcare and only 10.98 places per 100 children. The Rochdale Formula calculates there is an under-supply of 57 places. All full day care is offered through Childminders, however, a new day nursery is in development in a neighbouring ward. The playgroup also offers a wrap around service. The After School Club has ceased operating since the supply snapshot was taken as it was unsustainable, despite offering places at little or no cost to try and boost numbers.

The child population would indicate a need for childcare in the older age ranges which is something that is currently being piloted at the local high school in the neighbouring ward of Newbridge. The Trinant area is now part of the Flying Start programme so will be supporting all 2 year olds in this distinct area of the ward. Group Day Care will be supported in the new Day Nursery across the border in a neighbouring ward. This should support additional places for the 0 – 2 year olds too where there are very few vacancies. It is also anticipated that this will support the After School requirements that are not currently met, but in a more sustainable manner.

There is no Welsh medium provision in this area.

Darren Valley

This area shows the lowest number of childcare places within the county borough with only a total of 40 places, all offered within a Flying Start setting. The providers states that they currently have 16 occupied places and 24 vacancies. All places are offered through the medium of English with Welsh.

The ward shows only 8.2 places per 100 children all offered in the community of Fochriw. There is no childcare in the town of Deri. The parental survey mirrored this as the majority of respondents use family and friends for their childcare.

As a ward the demographics show a low level of economic activity, however, the market could be tested further in the Deri area for After School Provision and Wrap Around as this area is distinct from the Fochriw area which has much higher levels of deprivation. Deri however, is an isolated community and is relatively small, so any childcare would only be supporting its own community of children which is one of the smallest in the borough. The Rochdale formula shows an under-supply of 49 places.

Llanbradach

There are a total of 226 places offered within the After School Clubs, Breakfast Clubs, Childminder, Holiday Clubs, Playgroup and Wrap Around settings. There are 165 registered places. In addition there are 12 places for Early Years Education within the non-maintained sector. Providers state that they currently have 137 occupied places and 32 vacancies. 0 places are available through the medium of Welsh, 48 Welsh/English, 0 Bilingual, 153 English Welsh and 25 English.

Llanbradach hosts a good mixed economy of childcare provisions for all ages under 11 years old. However, the demographics of this area show that there is a higher proportion of 11 – 14 year olds than the younger age groups and therefore the only potential gap could be in this area. Childcare for this age group would normally be provided at the secondary schools which serve this locality which are located in neighbouring wards. Currently all childcare for 11-14's is provided with childminders. Since the FIS Snapshot in August 2013, another childminder has registered in this area with an additional 3 places.

The Cylch Meithrin offers sessional care through the medium of Welsh but it has defined itself as Welsh/English. There are also good levels of Welsh used in the Day Nursery. There are 28.07 places per 100 children and the Rochdale formula suggests there is an over supply of 92 places (compared to the last CSA which reported an under-supply). The geographic location of this area sitting between the economic hubs of Caerphilly town and Ystrad Mynach, enables it to manage the number of childcare places it offers.

Nelson

There are a total of 102 places offered within the Breakfast Club, Childminder, Day Nursery and Playgroup settings. There are 143 registered places. In addition there are 11 places for Early Years Education within the non-maintained sector. Providers state that they currently have 92 occupied places and 21 vacancies. 13 places are available through the medium of Welsh, 0 Welsh/English, 35 Bilingual, 54 English Welsh and 0 English.

This area has relatively low numbers of 0 - 7 year olds and a falling population. However, it does have above average economic activity and a geographic location that can support the childcare needs of parents travelling towards the A470, the busy trunk road between Cardiff and the valleys.

There are currently only 12.85 places per 100 children and the Rochdale formula suggests that there is an under-supply of 30 places, however as there are 143 registered places and only 102 places offered there must be under occupancy in some settings, indicating a capacity to extend places if required. The supply data also did not capture the newly opened After School Club which now offers 16 places, the newly opened wrap around provision also offering 16 places and a new childminder offering an additional 3 places.

In the neighbouring county of Merthyr Tydfil, the towns of Treharris, Trelewis and Bedlinog sit close along the border with Nelson and the childcare offered there may have an impact on the gaps/demand in this area. This consists of 3

After School Clubs, 7 childminders, 2 Cylch Meithrin, 1 Day Nursery and 2 community playgroups. Further research would show how many Caerphilly residents access this out of county childcare, to help inform future childcare developments.

New Tredegar

There are a total of 94 places offered within After School Club, Childminder, Flying Start, Playgroup and Wrap Around settings. There are 125 registered places. Providers state that they currently have 88 occupied places and 6 vacancies. 0 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 84 English Welsh and 10 English.

The childcare in New Tredegar is offered through 1 childminder, a Flying Start provision which is distinct to an isolated part of the ward, and through the Integrated Children's Centre located at the centrally located primary school. Of the 6 vacancies reported 5 are with the childminder and only one is with the wrap around provision. This indicates there is little demand for full day care provision. Where this exists, parents who are travelling south down the valley to work can access the Day Nursery in the neighbouring ward of Aberbargoed.

However, since the FIS Snapshot in August 2013, the one childminder registered in this area has moved to the Penyrheol area meaning a loss of 5 places in New Tredegar. Of the childcare places that are offered there are no places available, however, if demand grew there are registered places that could be offered, so capacity for the age ranges 3 – 8 exists.

There is no Welsh language provision in this area, however, there are some levels of Welsh offered at the Integrated Children's Centre.

There is no group childcare provision for the over 11's, however, there is a very strong play team presence linked to the ICC which supports play activities for this age group and supports holiday activities for over 8 year olds.

With only 10.02 places per 100 children and with an undersupply of 24 places according to the Rochdale formula, it would appear that more childcare could be developed in this area, potentially Welsh language.

Newbridge

There are a total of 77 places offered within Childminder, Flying Start, Playgroup and Wrap Around settings. There are 71 registered places. Providers state that they currently have 53 occupied places and 24 vacancies. 0 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 32 English Welsh and 45 English.

This area has a limited supply of childcare with the majority of places offered by Flying Start in a distinct, isolated part of the ward. The Rochdale formula calculates an under-supply of 97 places, and there are only 6.77 places per

100 children, one of the lowest across the borough. There are also a relatively high number of vacancies.

The Wrap Around provision has 50% places unfilled suggesting lack of demand. This group is linked to its playgroup and there maybe opportunities to extend either the Wrap or Playgroup numbers depending on demand. There is no After School Club or Holiday provision in this area and no Day Nursery. There is, however, a new Day Nursery in development which is hoped will support the unmet childcare places of this area. It is anticipated this will open summer/autumn 2014 and will forge close links with the school it is to be located next to.

This area lies on the border with Torfaen and from a search on the FIS located there, the 3 wards of Cwmyynscoy, Wainfelin and Green Meadow only have a total of 5 Childminders between them as childcare services. It is unlikely that these childcare providers will have any impact on developments in the Newbridge region.

Pengam/Cefn Fforest

There are a total of 202 places offered within the After School Club, Breakfast Club, Childminder, Day Nursery, Holiday Club, Playgroup and Wrap Around settings. 179 places are registered. Providers state that they currently have 146 occupied places and 14 vacancies. 96 places are available through the medium of Welsh, 7 Welsh/English, 12 Bilingual, 48 English Welsh and 39 English.

This area demonstrates a relatively low number of childcare places per 100 children of only 13.71. The Rochdale formula suggests there is a slight over-supply of places, however, and given that this area has a lower than average economic activity and that there are two areas which will be offering Flying Start programmes starting Summer 2014, this is relative.

Through the middle of this area runs a route between the top end of the valley and the Blackwood/Ystrad Mynach areas. As such it could capture and accommodate the childcare requirements of those travelling to work.

There is a fairly good mix of childcare provision currently, but with only 14 vacancies, demand is relatively high. Almost half of the childcare offered is through the medium of Welsh although not one childcare type is exclusively Welsh, offering a good choice to parents. A new day nursery is currently in development which is looking to offer 24+ places including After School provision.

There is very little childcare provision for 11 – 14 year olds, and the places available are in the Welsh medium Holiday Club and Breakfast Club. As an area that has a large concentration of 8- 14 year olds, this may be area that would require further development. In addition there is the Welsh medium Secondary School that could accommodate appropriate Welsh medium provision for the 11 – 14 year olds.

Penyrheol

There are a total of 399 places offered within the After School, Childminder, Day Nursery, Holiday Club, Playscheme and Wrap Around settings. There are 361 places registered. Providers state that they currently have 282 occupied places and 34 vacancies. 0 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 244 English Welsh and 155 English.

Penyrheol is made up of several distinct communities and supply of childcare places varies within it, as does the economic make up of the ward. Together it has one of the highest densities of children in the county borough and therefore the need for childcare places would be higher. This is further highlighted by the fact that there are very few vacancies reported by providers, that there are relatively low numbers of childcare places per 100 children (15.38), and that the Rochdale formula suggests an under-supply of places by 33. In 2014, there will be additional Flying Start Childcare places which will help to boost the numbers of childcare places for the 2 year old age group.

Since the FIS Snapshot in August 2013, 3 other Childminders have registered in this area with an additional 13 places, but one has stopped operating with a loss of 6 places. One childcare setting defines itself as a day nursery, though it does not open to the general public as it is the Caerphilly Children's Centre which offers unregistered sessional childcare places for children with recognised disabilities. There is, however, a Day Nursery that lies on the border with a neighbouring ward and is very close to one of the schools. All of the sessional childcare for the 3 and 4 year olds is run through Wrap Around provisions and there are no stand-alone Playgroups or Cylch Meithrin. All of the provision is provided mainly through the medium of English.

This ward has one of the highest levels of provision for the 11 – 14 age range. This is primarily in the summer playscheme that is run here and some in the after school clubs. In addition there is a Chill Zone located in the Secondary School within the ward offering appropriate childcare for up to 20, 11 – 14 year olds.

Pontllanfraith

There are a total of 154 places offered within the After School Club, Childminder, Playgroup and Wrap Around settings. 89 places are registered. In addition there are 7 places for Early Years Education within the non-maintained sector. Providers state that they currently have 77 occupied places and 36 vacancies. 0 places are available through the medium of Welsh, 3 Welsh/English, 14 Bilingual, 45 English Welsh and 92 English

The supply of childcare places in this ward is very low in comparison to the large child population with only 9.87 places per 100 children. The Rochdale formula suggests a moderate under-supply of 44 places. The childcare places available are provided in a variety of settings. However, since the data was collected in August 2013, this picture is rapidly changing. There is a new Day Nursery in development, hoping to open Easter 2014 with an additional 56 places, the After School provision has recently closed due to lack of demand,

although this could be supported by the new Day Nursery, and the Wrap Around is also under threat of closure. The Playgroup/Cylch is run through the medium of Welsh with English and has no vacancies. There are also no places for 11 – 14 year olds in this ward.

2 Childminders have also stopped operating since the FIS snapshot in August 2013, with a loss of 5 places.

St Cattwg

There are a total of 148 places offered within the After School Club, Childminder, Day Nursery, Holiday Club, Playgroup and Wrap Around settings. 134 places are registered. Providers state that they currently have 108 occupied places and 17 vacancies. 0 places are available through the medium of Welsh, 20 Welsh/English, 0 Bilingual, 82 English Welsh and 46 English.

This ward has a relatively low number of childcare places per 100 children at 10.47 places. The Rochdale formula suggests there is an under-supply of 29 places. There has a good supply of places for children aged under 5 but a lack of provision for over 5's in a large part of the ward. The one After School Club is located at the bottom end of the ward across a busy road. The other places for over 5's are with Childminders and although the Day Nursery (located at the top end of the ward) is able to provide for 5 – 8 year olds, it does not currently offer this facility. There could be room for extending into this area if there is further parental demand. This is further highlighted by the response to the parental survey where it showed that families from this area tend not to use After School Clubs, but also do not use families and friends to meet their childcare needs, indicating that potentially they are using childcare located outside of the ward.

The Cylch Meithrin defines itself as mainly Welsh, and there are other Welsh medium Wrap-Arounds and After School Clubs located within the Welsh school on the wards border in Penallta.

St James

There are a total of 201 places offered within the After School Club, Breakfast Club, Childminder, Flying Start and Holiday Club settings. 216 places are registered. Providers state that they currently have 124 occupied places and 65 vacancies. 0 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 163 English Welsh and 38 English.

St James' location is a mixture of rural and urban. It's urban area sits nestled just outside Caerphilly town and next to Bedwas, Trethomas and Machen. Both of these neighbouring wards have a good supply of childcare.

This ward has a day nursery located in the industrial/business park on the outskirts of Caerphilly and supports the childcare needs of those who work in the park as well as local residents. The ward also has two after school clubs, one of which is located in the Catholic School and supports childcare needs for its pupils from the whole county rather than just the local residents. They

also host a holiday club which shares its venue with the holiday club located in Penyrheol in order to support sustainability.

The densely populated area of Lansbury park, with its high percentage of lone parents, high levels of parents who look after home and family and low levels of economic activity, has a very active Flying Start Programme offering preschool provision for eligible children only. When the FIS snapshot was taken, the setting was temporarily offering Early Years Education places for 3 year olds because of lack of supply in the local primary school. This has since stopped as supply has again become available in the school.

The Catholic School has recently considered developing a Wrap Around scheme to support its nursery aged pupils, but again this would support families from the whole borough rather than this ward.

The Rochdale formula suggests a very slight over-supply of places, and there is a relatively high number of 17.19 places per 100 children (not including Flying Start places). But this area is not straightforward to analyse given the factors outlined above.

With limited numbers in Holiday provision and no Playgroup or Wrap Around schemes there is scope for the development of these sorts of provisions. However, the Flying Start programme supports preschool provision in the densely populated Lansbury Park, so a Playgroup could be considered in the more remote rural parts of the ward, where transport and sustainability may be issues to closely consider.

Considering Caerphilly Basin as a whole, there is a general lack of Early Years Education places for 3 year olds in both maintained and non-maintained settings. This needs to be addressed by the local Education Authority.

St Martins/Morgan Jones

There are a total of 617 places offered within After School club, Breakfast Club, Childminder, Day Nursery, Holiday Club, Play Scheme, Playgroup and Wrap Around settings. 611 places are registered. In addition, there are 15 places for Early Years Education within the non-maintained sector. Providers state that they currently have 656 occupied places and 43 vacancies. 236 places are available through the medium of Welsh, 72 Welsh/English, 0 Bilingual, 206 English Welsh and 103 English.

This area has a good supply and a good variety of childcare provisions. As a central hub of the county borough and one with high levels of economic activity, this area serves not only its own community, but also that of the surrounding wards and those travelling to work in the area from further afield. As such it can accommodate and sustain high levels of childcare places and has one of the highest rates of childcare places per 100 children at 23.07. There are relatively few vacancies. The parental survey also indicated that families from this area have one of the lowest rates of using family and friends

to meet childcare requirements and the highest percentage use of Day Nurseries.

Since the FIS Snapshot in August 2013, a new Day Nursery has registered in this area with an additional 65 places. It is well located next to the main railway station to Cardiff and is in a position to be highly sustainable. It will also offer additional After School Club places across the area.

Since the FIS Snapshot in August 2013, 2 childminders have suspended their registration in this area with a loss of 8 places.

Twyn Carno/Moriah/Pontlottyn

There are a total of 181 places offered within the After School Club, Childminder, Day Nursery, Flying Start, Playgroup and settings. 166 places are registered. The majority of places are Flying Start. Providers state that they currently have 135 occupied places and 43 vacancies. 27 places are available through the medium of Welsh, 0 Welsh/English 70 Bilingual, 84 English Welsh and 0 English.

This area is one of the more deprived areas of the county borough and the majority of childcare places are Flying Start. The one area of higher economic activity in Pontlottyn, has no childcare within it. Childcare places per 100 children are relatively low at only 11.81 places. There is one Day Nursery on the border with Blaenau Gwent which is reporting no vacancies and there is a Day Nursery just across the border which also caters for the childcare needs of families from Caerphilly county. The Playgroup is Welsh medium and offers Flying Start places which take up the majority of places. The lack of provision for 5+ is evident and the Day Nursery supports after school places although demand is low. The local Comprehensive school is developing a chill zone element for the 11+ age group, supporting after school activities.

The Rochdale formula suggests there is an under-supply of 93 places. The Welsh medium primary school is in the process of developing a new Wrap Around service to open in Autumn 2014 which will help alleviate any undersupply and support working parents. The Childminders and Day Nursery are only reporting 2 vacancies between them indicating a possible area for development of new full day care provision. Given its proximity to both Meryth Tydfil and Blaenau Gwent economic regions, further testing of the market across county borough borders and exploring the levels of childcare sufficiency in these areas is advisable prior to any new major developments.

Ynysddu

There are a total of 84 places offered within the After School, Breakfast club, Childminder, Holiday Club, Playgroup and Wrap Around settings. 44 places are registered. Providers state that they currently have 81 occupied places and 35 vacancies. 0 places are available through the medium of Welsh, 0 Welsh/English, 0 Bilingual, 84 English Welsh and 0 English.

Since the snapshot of this area in August 2013, the level of childcare places has now changed as one Playgroup and one After School Club have now closed with a loss of 11 places for the 3 – 4 age group and approx 16 places for the After School Club. A new After School Club is now opened and awaiting registration but in a different location.

This area has a higher proportion of childcare in the 8 – 14 age groups yet there is still very little provision available. The new After School Club that is awaiting registration, currently offers provision for the over 8's. This is offered in one of the 2 schools and links could be made with the other local school to share provisions and support the higher proportions of the older age group.

There is no Welsh medium provision offered in the area.

Ystrad Mynach/Maeycwmmmer/Henoged

There are a total of 554 places offered within After School Club, Breakfast Club, Childminder, Day Nursery, Flying Start, Holiday Club, Playgroup and Wrap Around settings. There are 477 places registered. Providers state that they currently have 496 occupied places and 54 vacancies. 172 places are available through the medium of Welsh, 0 Welsh/English, 6 Bilingual, 253 English Welsh and 123 English.

This area has one of the highest levels of childcare places across the borough at 22.48 places per 100 children. It also has a good mixed economy of childcare type including a good mixture between Welsh and English medium. There is also a good amount of childcare across the age groups however, all of the 11 – 14 provision is with After School Clubs in the primary schools. The secondary school within this area is in the process of developing a new Chill Zone club for the older age range which is hoping to be open after Easter 2014 with places for up to an anticipated 35 + young people.

The Rochdale formula suggests an over supply of 91 places, however, given that this area supports childcare for many residents travelling to work in this central economic hub, it can sustain the large number of childcare places. Since the FIS Snapshot in August 2013, one Childminder has ceased to practice with a loss of 5 places. The Holiday Zone, whose catchment is county wide, also reports no vacancies and could expand to offer additional places. A new crèche venue is in the process of registration in Ty Graddfa to support the New and Expectant Mums project.

Funded Childcare Places

Early Years Education for 3 Year Olds

Caerphilly Local Education Authority offers free Early Years Education places for children the term after their third birthday. This is either in a school setting or in a childcare setting that is registered with the local authority to deliver the Foundation Phase. These settings include 3 Day Nurseries, 4 English medium Playgroups and 7 Welsh Medium Playgroups. Of the 72 primary schools in Caerphilly, 7 do not offer provision for the rising three year olds. All schools offer Foundation Phase provision for Rising 4 year olds. Of the 7 schools that do not have capacity to offer nursery provision for the younger children, 3 are in the Caerphilly Basin area. Within both school provision and childcare provision there is enough capacity across the borough to accommodate 100% of eligible 3 year old children. These places, however, may not be in the geographical area of a parent's choice.

Flying Start Childcare

Flying Start Childcare offers free, part time childcare for children aged two years (the term after their second birthday) who live in one of the 19 defined Flying Start areas. Childcare places are provided through a mixture of 15 Caerphilly Council run settings, 6 English Medium Playgroup settings, 4 Welsh Medium Cylch Meithrin and 2 childminder settings. Data for Flying Start Places take up in the Autumn term 2013 shows a 91% take up by eligible children.

Assisted Places Scheme

Caerphilly CBC operates an Assisted Places Scheme which supports the improvement in the welfare or quality of life of children by providing access to childcare placements to address a child's emerging needs. The scheme is available borough wide and will pay for the parental fees for individual children to access sessional childcare provision for a time limited placement to address specific targets. The referral scheme operates through the Team Around the Family (TAF) and Integrated Services for Children with Additional Needs (ISCAN) models and via other defined referral criteria. In total the number of children accessing a 10 week placement during the year 2013 – 14 was 194, in a variety of settings. Whilst this scheme helps to support children from poorer families access childcare, it also supports the sustainability of childcare settings by filling vacant places.

Free Breakfast Clubs

Although not defined as childcare nor registered with Care and Social Services Inspectorate for Wales (CSSIW), free Breakfast Clubs within school settings offer a vital service for parents wishing or needing to get to work earlier than the start of the school day. In Caerphilly schools there are a total of 3270 places offered.

Mobile Crèche Provision

Free Crèche provision is offered through both the Families First Mobile Creche and the Bridges into Work Crèche provision. The Families First Crèche operates in various venues across the county borough and supports free childcare for parents engaging in Families First and Flying Start Activities including training and parenting programmes. The Bridges into Work crèche operates from a fixed venue in Bargoed but supports parents county-wide.

Demand and Ability to Pay for Childcare

Caerphilly County Borough is made up of a group of 50 relatively small, mainly former coal mining communities stretched across 25 miles north to south and taking in the rivers Rhymney, Sirhowy and Ebbw. Caerphilly is the 5th largest authority in Wales in terms of its population size. For the purposes

of the Childcare Sufficiency Assessment the borough has been divided into 22 localities based on wards and clusters of wards. The Welsh Index of Multiple Deprivation (2011) demonstrates that the picture of deprivation in Caerphilly is not uniform, but rather gives the impression of intense pockets of disadvantage. There are 16 areas in the 10% most deprived communities in Wales.

The 2011 Census shows there were 32,734 children aged between 0 – 14 living in the county borough. This equates to 18.3% of the population as a whole. This is slightly above the proportion of children in Wales.

Ward	under 1's estimate	aged 1 and 2	aged 3 and 4	aged 5,6 and 7	aged 8,9,10	aged 11,12,13 and 14	Totals 0 - 14
Aber Valley	126	217	193	288	262	354	1440
Abercarn	60	153	170	195	161	275	1014
Argoed and Aberbargoed	89	199	197	249	205	311	1250
Bargoed and Gilfach	112	205	205	265	254	351	1392
Bedwas, Trethomas and Machen	126	271	300	425	372	542	2036
Blackwood and Penmaen	155	306	320	503	527	700	2511
Crosskeys and Risca	172	329	305	437	419	680	2342
Crumlin	66	125	137	181	188	305	1002
Darren Valley	34	61	61	80	94	158	488
Llanbradach	59	102	115	147	163	219	805
Nelson	48	97	104	129	166	250	794
Newbridge	78	146	156	203	221	333	1137
New Tredegar	90	148	138	172	175	215	938
Pengam and Cefn Fforest	109	197	188	273	277	429	1473
Penyrheol	194	394	363	504	480	659	2594
Pontllanfraith	96	219	185	346	304	410	1560
St Cattwg	87	207	160	288	269	403	1414
St James	69	159	176	230	223	312	1169
St Martins and Morgan Jones	197	388	372	503	512	702	2674
TwynCarno/Moriah/Pontlottyn	119	181	201	289	298	445	1533
Ynysddu	47	99	77	124	144	213	704
Ystrad, Maescwmmer, Hengoed	168	330	356	458	469	683	2464
Totals per age group	2301	4533	4479	6289	6183	8949	32734

In some areas there are proportionally more children in the 0 – 7 age range (Aber Valley, Argoed/Aberbargoed, Abercarn, Bedwas/Trethomas/Machen, Penyrheol, Pontllanfraith and St James) and in other areas there are proportionally more children in the 8 – 14 age brackets (Blackwood and Penmaen, Darren Valley, Nelson and Newbridge).

According to the 2011 Census, the population of children rose by 1023 since that reported in the last CSA in 2011 (based on data from the Census 2001). However, the proportion of children aged 0 – 14 amongst the whole population has dropped suggesting an aging population. There has been very little fluctuation within birth rates for the past 10 years, although data does show that there were small booms in live births in 2008 and 2010 and a lower than predicted number of births in 2011. Again there are variations between wards. By year group data shows there are more children in the 0 – 7 age range than the 8 – 14 age range. Projections of births suggests a 0.5% percentage drop in the birth rate over the next 5 years in Caerphilly which equates to approximately 13.2 births a year. With migration rates in and out of the county balancing each other, it is not likely to impact on any significant changes to demand on childcare.

Children with Disabilities

Data for England and Wales suggests that 18% of children and young people will have some mild disability. In Caerphilly this would correlate to 5708 children and young people aged 0 – 14 years of age with an additional 1205 in the 15 – 17 age range. The number of children aged 0 - 18 identified as having statements in Caerphilly schools is 929. Broken down by age this is:

- 0 - 4 year olds – 22
- 5 – 10 year olds – 300
- 11 – 14 year olds – 370
- 15 to 18 year olds – 237

The number of children with disabilities recognised on the Integrated Children's System (ICS) in Caerphilly under the age of 18 is 197 as of Sept 1st 2013. Of these, 34 are in the 15 to 18 age range and need to be considered in this Assessment.

Family Size and Make up

According to the 2011 Census data, Caerphilly has higher than average percentages of married/same sex civil partnerships with dependent children (14.8%) than the Wales average (13.9%), higher than average cohabiting parents households with dependent children (5.8%) than the Wales average (4.5%), and higher than average lone parents with dependent children (8.8%) than the Wales average (7.5%). Census 2011 data shows that the highest percentages of children living in lone parent households were in St James (42.77%), Twyn Carno/Moriah/Pontlottyn (38.93%) and Argoed/Aberbargoed (36.24%). The proportion of lone parents will have an impact on the demand for childcare as although they are likely to have an increased demand for childcare in order to support access to employment, they are the least likely group to be economically active. However, data does show an increased take up by lone parents of the Childcare Element of the Working Tax Credit in recent years.

Local Authority household projections suggest there will be a steady increase in the number of single parent households in Caerphilly and a steady decrease in the number of two parent households following the national trend.

Economic Activity and Inactivity

Overall levels of economic activity in Caerphilly are slightly above the average for Wales. In total, statistics for 2012/13 show 75.2% of people of working age are economically active (74.5% for Wales), and 9% are unemployed (or seeking employment) compared to 8.1% across Wales. Numbers of residents who are economically active has increased across the borough.

According to the 2011 census data, there is quite a large spread between the localities with the highest and lowest percentages of their 16 - 74 population that are economically active. The highest economic activity can be found in Blackwood/Penmaen, (68.3%), St Martins/Morgan Jones (69.7%) and Abercarn (69.25%). A total of 10 wards/ward clusters show economic activity over 65%, which is a 5% increase since the Census 2001 figures.

In the main, the majority of people drive to work and full day childcare (Day Nursery and Childminders) that operates in economic hubs and on routes to work will support employment. For those parents of school age children who work, out of school childcare based around the school site and local to the child's community would be better located.

Of those that are economically inactive there are a number of adults looking after their household or family throughout the county. These people are not actively seeking employment and may be at home looking after children which may have an impact on the demand for childcare. The 2011 Census notes that the highest percentages for economically inactive men are located in Aber Valley, Darren Valley, and Penyrheol . The lowest percentages were in Nelson, Abercarn, Crumlin and Ynysddu.

The 2011 census notes that the highest percentages for economically inactive females looking after home and family are located in Aber Valley, New Tredegar and St James, and the lowest were in St Martins/Morgan Jones, Nelson, and Crosskeys.

The average percentage of households in Caerphilly county borough where the economically inactive population is looking after home and family is 24.9% compared to the Wales figure of 21.5%. The fluctuations across the wards show patterns across the borough and give an indication as to where the traditions of families and friends looking after children remain strongest and where the requirement for childcare may be at its highest. The use of family and friends as the most favoured childcare option was highlighted in the parent survey.

Children living in Poverty

As noted earlier, the Welsh Index of Multiple Deprivation 2011 shows that there are 23.6% of the counties small communities (Lower Super Output

Areas) that fall within the 20% most deprived communities in Wales, with 16 communities in the top 10%. Of these 16, 13 are included in the Flying Start Programme and free childcare for 2 year olds is offered to those children who live in the most deprived areas. The Assisted Places Scheme aims to support access to childcare for referred children who are not eligible for Flying Start Childcare.

Welsh Language

The data from the Census 2011 shows 31.34% of children and young people aged 3-19 in Caerphilly speak Welsh to some level. This is notably higher than the figure for the whole of Wales, which is quoted for all age groups as being 23.3%. With 11 Welsh Medium Primary Schools the demand for Welsh medium childcare is likely to be relatively high and as highlighted in the supply report there is a good variety of Welsh language and bilingual childcare provision across the county. There are pockets however, where additional childcare places could be developed. Additional childcare places will be considered in partnership with the Welsh medium Schools including provision for the 11 – 14 age group.

Ethnicity

Over the past 10 years, since the last Census, the population of Caerphilly is becoming more ethnically diverse but only marginally. The most recent data suggests that only 2.2% of the population is from a non-white ethnic background which is less than the 4.4% average across Wales. The southern end of the county has a higher proportion of non-white ethnic groups than more northern wards. Because these groups are sparsely populated with the absence of large communities, there is potential for isolation. There is also minimal demand for specific childcare provisions for any one particular ethnic group.

Housing and Employment Developments

There are a number of housing developments in progress across the county borough which may have an impact on the childcare market in these areas. The main areas for housing development over the next 5 years are in the Caerphilly Basin and Ystrad Mynach areas.

The major retail development in the Bargoed area is likely to increase employment in the area and as such have an impact on the need for childcare in particular childcare that can support flexible, shift working.

The Views of Parents and Carers

A survey was carried out in the summer of 2013 to seek the views of parents and carers on childcare. Responses from 904 parents were received and

analysed. Enough responses were received to give us confidence that the answers given are representative of the population of the county as a whole. Respondents to the survey were mainly female, broadly in line with the ethnic make up of the county, had a good representation of lone parents and were a higher percentage of working females than in the whole population. 139 respondents stated that they had a child with some form of disability.

In addition to the questionnaire, Focus Groups were carried out with parents of children with disabilities and parents requiring childcare through the medium of Welsh.

The responses indicated that approximately a third of families in Caerphilly use childcare regularly and of these, just over 50% use families and friends to look after their children. Approximately a third use Day Nurseries and Breakfast Clubs in schools. During school holidays those using family and friends increases to 57%, but use of Day Nurseries drops to 25% and 17.6% use a Holiday club or a Playscheme. The majority of childcare that is used (92.8%) is based within Caerphilly.

On average, parents/carers use 15.2 hours of childcare a week. The average for working parents was higher at 19.5 hours and those children under the age of 3 used on average 22.3 hours of childcare a week. Children use significantly more hours of childcare a week when they are of preschool age. Once they enter school the hours they spend in childcare drops to approximately 12.5 hours a week.

The main reasons given for using childcare were to go to work with some parents reporting that they liked their child to attend childcare for the social benefits for their child. A small percentage used formal childcare in order to study, but the flexibility of family and friends was a preferred option. The main reasons given for not using childcare were that they were a stay-at-home parent, their family looked after their child and that childcare is too expensive.

The majority of parents state that childcare partly or fully meets their needs during term time, but this dropped during school holidays. Some parents responded that insufficient childcare was a barrier to them accessing employment and approximately 10% reported that they had issues with childcare arrangements that break down or are unreliable.

Almost two thirds of parents who use formal childcare receive some form of financial help towards the costs. Of these, just over a quarter have access to childcare vouchers and nearly a third access the Childcare Element of the Working Tax Credit. Many parents saw the benefit of free early years education places as helping towards childcare costs and some commented on the use of free Flying Start childcare as a cost benefit. There is general agreement across the borough that childcare is too expensive and could be more affordable. However, the recent National survey on childcare costs shows that both the all-UK and all-Wales costs of childcare across all childcare providers are consistently higher than those in Caerphilly.

The provision of Welsh medium childcare is relatively good, but there are some areas where additional Welsh medium childcare could be provided. Welsh medium childcare is well used with fewer than average vacancies reported. There is a relatively good supply of Holiday provision through the medium of Welsh and the majority of Welsh medium primary schools have After School Clubs and Wrap-Around provisions on site. Parents in the Welsh medium focus group suggested that there was a need for increased Welsh speaking Childminders to collect children from Welsh medium primary schools, appropriate childcare provision for 11 – 14 year olds based in the secondary school and, despite their being bilingual Day Nursery provision, a fully Welsh medium Day Nursery would be a welcome development.

Families with children with disabilities use less childcare than other families and are more likely to use family and friends and Childminders because of their ability to be more flexible. They are also more likely than others to want childcare that is better at meeting their child's needs. Parents in the focus group discussed how trust was an issue for them and finding the right childcare provider to meet the specific needs of their child was not always easy. They were prepared to travel to find the right childcare with the right training and expertise rather than utilising a local childcare provider who was not fully able to meet their child's needs.

Generally, the majority of respondents tended to have high levels of agreement that they were satisfied with their childcare (more so in term time than in school holidays), that the quality of childcare is high and that it caters for their child's needs.

In terms of suggestions for improvements, the main areas noted were increased childcare outside the standard hours of 7.30 – 6 p.m. and additional Wrap Around services to support part-time nursery provision. A small number (4.8%) of respondents suggested that childcare could be improved by being better at meeting their child's individual needs and a similar number would like childcare closer to their home. Nearly half responded by saying that no improvements were needed although there is a general agreement that childcare could be more affordable. Overall, it would appear that Caerphilly residents are mainly satisfied with the childcare arrangements that are in place in the borough.

The Needs of Employers

Following a very poor response to a paper survey, childcare staff attended the local Caerphilly Business Forum meetings to talk directly to a range of employers across the borough. 13 local employers were consulted including 1 local franchise of a larger organisation, 5 small (less than 10 employees), 4 medium (less than 50 employees) and 3 large (50+ employees).

Many small and medium sized employers thought that their practices were adequate to support existing employees, but not many had the forethought to consider attracting new employees. One employer assumed that there were no childcare issues with regard to their evening shifts because staff had

volunteered to work these hours. Little consideration was given for those employees who may have wished to work these hours but could not because of childcare issues. Some of the employers operated shifts that began before 7a.m. or finished after 7p.m. These employees, if requiring childcare, would normally rely on family and friends it was believed.

Both large and small employers were able to offer flexi-working practices and were able to accommodate most staff's requests for flexible working.

No employer in Caerphilly County borough currently has on site 'crèche' provision for its own staff. In the past one day nursery was owned by a company (Britannia) and offered discounts for its staff. This company has now become a private enterprise and no financial assistance is given to staff, however, the location of the nursery – still on site – supports the childcare needs of the staff and is well used. The one business type that does offer childcare discount to its staff is privately owned day nurseries.

The majority of employers were not aware of the help and support that the Family Information Survey could provide and requested information to be sent so they could display on their staff notice board. Some employers were not aware of how the Childcare Element of the Working Tax Credits worked and so were unable to pass on this information to staff.

All noted that they were unaware if childcare had been an issue regarding employees taking up work, but one employee did note that one or two mothers had not returned to work following having a child.

Employers were more aware of Childcare Voucher Schemes and the take up was higher than in the past.

The views of Childcare Providers

A survey was carried out with childcare providers across the county borough and in addition a focus group was held with Childminders.

The view of Childcare providers across the borough was that a good range of affordable childcare was available in the borough and that it provided good value for money. In the main, quality was felt to be satisfactory to good and that there was a good choice. It was noted however, that choice reduces when you go further north up the county borough. Many providers are committed to supporting improved access to children with disabilities in particular through training and additional resources. Over 90% of group childcare providers have achieved the local quality award and many are undertaking or have achieved the national quality award.

Childminders in their focus group noted that they offered flexible childcare that was relatively well used. One childminder offered over-night care but it had not been requested yet. They all enjoyed the benefits of attending training offered by the Local Authority, but sometimes found it difficult to attend because of their working hours. Other concerns were raised over the numbers

of 2 year olds attending Flying Start and 3 year olds attending Early Years Education. In addition, they are finding it increasingly difficult to compete with After School Provision. They also had concerns over some parents misusing tax credits and the impact this was having on their business.

Many stakeholders saw the benefit of the Assisted Places Scheme as a positive programme to support both children in poverty with emerging needs into a childcare place where they could experience improved outcomes and also supporting the childcare setting by filling vacant places and thus supporting sustainability. No comments were received from the Local Safeguarding Board regarding suitability of childcare provision. Families First continue to fund the mobile crèche provision to support parents access to relevant training and parenting courses, and the Bridges into Work programme continues to fund their crèche to provide free childcare to support parents access to work.

Consultation with Children

A questionnaire was circulated to children using After School Childcare provision to ask their opinion on the childcare they use and whether they would be happy to use childcare one they reached secondary school. 66 responses were received.

The majority of children liked or loved their After School Provision with a small minority suggesting they did not like it because the activities were not age appropriate. Over 85% attended because their parents were at work. Over half of the respondents would be happy to go to some form of After School Provision in secondary school but over 75% agreed that their parents would want them to attend. The main message coming from these young people was that if they are to attend After School Provision then the activities have to be fun and age appropriate. The gap between what the young people want and what they believe their parents will want is an important one to note. As practitioners we must to work with the young people to understand what would make an appropriate environment for these young people to make their experience as positive as possible.

Childcare Gaps

The Childcare Sufficiency Assessment is required to present an analysis of gaps in relation to the provision of childcare in Caerphilly in the following areas:

- ◆ **Income Gaps or Affordability** – where there is a shortage of affordable childcare for income groups populating an area
- ◆ **Specific Needs Gaps** – where there is a shortage of suitable places for children with disabilities, or children with other specific needs or requirements.
- ◆ **Time Gaps** – where there is a shortage of specific childcare at a time that parents would wish to use childcare.
- ◆ **Age Gaps** – where there is a shortage of childcare suitable to meet the needs and requirements of a certain age group.
- ◆ **Type Gaps** – where there is a shortage in the type of childcare for which parents may be expressing a preference.
- ◆ **Geographical Gaps** – where a geographical area has a general shortage of supply

It is also important to look into gaps in provision for:

- ◆ Childcare for those who receive or may require childcare in the Welsh language/bilingual provision, and,
- ◆ Childcare provision for children and young people from working families or families seeking work.

Income Gaps and Affordability

- There is a general agreement across parent stakeholders in Caerphilly that childcare should be more affordable and that this is a top priority for improvement. This, however, varies between localities and different Income Groups. Childcare providers however, believe that costs are affordable and they provide good value for money.
- The cost of childcare was a particular issue for parents of children with disabilities.
- Despite this, parents are taking more positive steps towards making childcare more affordable. 26.6% more parents than that reported in the last CSA now access some form of financial support for childcare costs. This includes a big increase in two parent households claiming the Childcare Element of the Working tax credit. There was however, a drop in the number of Lone parents claiming the support.
- Flying Start is going some way to supporting access to childcare for children living in poverty and the Assisted Places Scheme is going some way to supporting those children who are ineligible for Flying Start to access childcare.
- Employers are also more likely to use childcare voucher schemes to support working parents than they were three years ago. However,

the majority of small employers still use an informal system of flexible working to support parents.

- Childcare costs in Caerphilly are lower than the cross-Wales average.

Specific Needs Gaps – Disabilities

- Parent/carers of children with disabilities are less likely to use childcare because they feel that there is not enough childcare to meet their child's specific needs
- Parents/carers of children with disabilities are more likely to use family and friends or Childminders as their form of childcare as they offer a more flexible service that can operate around the child's medical needs.
- Parents/carers of children with disabilities are more likely to use childcare that suits their child's needs rather than proximity to home.
- In the Winter 2013/14 a Workforce Audit was completed by childcare providers to assess the levels of competency against a number of disabilities. In light of this a training programme has been developed to increase competency in the more general areas of disability and specific training can be organised when a childcare provider requires it.
- Supply data showed that on top of the specialist provision provided by the Caerphilly Children's Centre, many childcare providers are well equipped to deal with a range of disabilities including good access and down stairs washroom facilities.

Specific Needs Gaps – Childcare Through the Medium of Welsh

- The majority of households with some level of Welsh language indicated that their childcare needs were being fully met whether this was with Welsh or English medium childcare or with Welsh speaking family and friends. Parents/carers did agree, however, that there should be increased levels of Welsh medium childcare, but this agreement rate varied across the county borough.
- Both the supply data and stakeholders highlight the lack of Welsh medium day care provision in both Day Nurseries and childminders.
- In the majority of Welsh medium primary schools there is a seamless childcare support around the school day with wrap around and after school provision. In those primary schools where this is not the case parents were suggesting a gap.
- There is no After School Provision for the 11 – 14 year olds at the Welsh medium Secondary School. This could be further extended into the new Welsh medium 3 – 19 school being developed in the St Martins/Morgan Jones ward.
- There is a short supply of Welsh speaking childcare staff and this is an area that needs to be addressed if high quality, additional Welsh medium provision is to be developed.

Time Gaps

- Very few respondents to the survey indicated that childcare opening times was a reason for not using childcare.
- However, nearly a third of all respondents who do use childcare suggested that childcare opening at different or extended times would be an improvement
- Holiday childcare could also be improved by being available at different times.
- Shift workers did not raise the opening hours of childcare as an issue, however, there was greater reliance on families and friends to support their working patterns.
- Parents in certain parts of the borough would like their child to be able to access greater levels of childcare, in particular the Crosskeys and Risca area.
- Flexibility in accessing childcare is an issue for those seeking work and/or training where their patterns of childcare requirements are not consistent.
- Higher demand for greater flexibility comes from areas where there is higher economic activity, less family and friends support network and from those with children with disabilities

Age Gaps

- Children aged 3 and 4 are most likely to be using childcare and this is where there are the majority of childcare places offered. However, the vacancy rate for this age group is relatively low.
- Free childcare that is offered for 2 year olds in Flying Start areas may have had an impact on the supply and take up data for this age group, i.e. it is difficult to determine the demand for childcare for 0 - 2 year olds in localities with Flying Start as the majority of places are taken up as an entitlement rather than as a need for accessing work or training.
- There is a general lack of provision for children with disabilities over the age of 15. However, some childminders will take children over this age when supported by a Social Services placement.
- There is no Welsh language childcare for children aged 11 – 14.
- Gaps in childcare supply by age vary considerably by locality.

Type Gaps

The main areas where there are identified gaps in the types of childcare across the borough are:

- Geographically located Welsh Medium places or, conversely, English medium places. The spread of English and Welsh medium provisions in relation to type of childcare, is not even across the county borough, with some areas having a good supply of a variety of types, but these may only be available in the medium of Welsh or

English. This imbalance is explored further in the Geographic Gaps analysis report.

- In addition, there is recognition that there needs to be a greater increase in the number of Welsh speaking practitioners to support any expansion of Welsh or Bilingual provision.
- The use of family and friends as a preferred use of childcare is often a cultural one rather than one of necessity because of lack of childcare provision. The high levels of reported satisfaction with childcare arrangements of those that use childcare (including family and friends) confirms this.
- Holiday provision – there are areas across the borough where there is no holiday provision that is suitable for the school age child. While 44% of respondents who use childcare in the school holidays said that their needs were fully met in the school holidays, that leaves 56% who say that their childcare needs are either only partially met or not met at all. The Focus groups noted that holiday time is often a juggling act between family, friends and formal childcare.
- With only 422 places in Holiday clubs (i.e. not in Day Nursery or with a Childminder), across the borough for children aged over 8, and very few vacancies, this area is a potential gap.
- Suitable provision for children aged 8 – 10 and 11-14. The lack of appropriate childcare for those children entering Secondary School is a particular area of focus across the borough.

Gaps for Working Families and those Seeking Work or Training

- The majority of those who use childcare do so in order to work. The questionnaire conducted in After School Clubs reiterated this point where almost all the children stated that they attended their club because their parents worked.
- Those with regular working patterns are more likely to use formal childcare and those who are training and those that have irregular working patterns are more likely to use family and friends or Childminders to support their childcare needs because of their increased levels of flexibility.
- Of those respondents that do not work, 22.2% said that this was because there was a lack of suitable childcare. Colleagues in Job Centre Plus no longer collate this data as the fundamental logic for using this as a reason not to find employment were not explored fully enough.

Conclusion

A full picture of the Gaps in Childcare is given in the Reports that accompany this Summary. The general picture is that the supply of Childcare in Caerphilly is relatively healthy and the number of childcare places has improved since the last CSA conducted in 2011. There are geographic areas where additional childcare can be developed to support parents into work or training and the specifics of these can be found in the Geographic Gaps Analysis Report where local demand is looked at in relation to supply and other local factors. However, even in areas where some forms of childcare are deemed insufficient, the market will need to be tested further given the current economic climate and challenging social conditions.

Feedback on the Draft Summary

This Draft Summary document was posted on the Caerphilly Early Years Website for public consultation between April 10th 2014 and April 28th 2014. Stakeholders were contacted to inform them that the Summary Report was available for feedback. Stakeholders were contacted via news items on the Intranet, Internet, Facebook, text messages to all childcare providers, Family Information Services web site, emailing to relevant partners and Umbrella Organisations. Printed copies were available through libraries and library staff were asked to support those who had limited access to IT.

The Feedback questions asked were as follows:

- How easy was the assessment to understand?
- Do you think the assessment is a fair reflection of the childcare market in your area?
- Do you think the gaps outlined match your understanding of where the key gaps in the childcare market are? If not, where do gaps exist?
- How would you improve the assessment?

All responses received were positive and any comments made were around partnership working in supporting the development of the market in accordance with the findings for the CSA. Clarification was asked around the reasoning behind identification of gaps in relation to Welsh Medium childcare. This is further explored within the Geographic Gaps Analysis and the Welsh in Education Strategic Plan (WESP) and will be addressed in the associated Action Plan.

PACEY Cymru, in particular, were pleased that the LA recognises the importance of childminding provision and felt that the CSA report was clear, concise and easy to follow. They believe it was a fair reflection of provision in Caerphilly based on their knowledge. They also felt that the CSA clearly showed where the gaps in provision were and that it considered some future implications. They found it interesting to learn that in two wards childminders provided the only form of full day care. PACEY Cymru would like to explore the possibility of utilising the services of Childminders to deliver Early Years

Education in the future and were happy to support childcare market development in the future.

All other responses received were positive and made no suggestions for improvement.