Pobal Annual Survey of the Early Years Sector 2012

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An Roinn Leanaí agus Gnóthaí Óige
Department of Children and Youth Affairs

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Introduction

1. Methodology

Once a year, Pobal takes the opportunity to gather information from early years services across the country to help inform both Pobal and the Department of Children and Youth Affairs (DCYA) on developments within the sector. The primary aim is also to inform the management of the various funding programmes in which Pobal is involved with the DCYA but the survey also serves the information needs of other agencies within the sector. For the second year running, the questionnaire is now circulated to all services participating in the main DCYA funding programmes (Early Childhood Care & Education (ECCE), Community Childcare Subvention (CCS) and Childcare Education & Training Supports (CETS)). This involves circulation to over 4,300 early years services. Prior to 2011, the survey had focussed only on services funded under the National Childcare Investment Programme (NCIP) Capital and Community Childcare Subvention programmes. Because of the change in methodology, the 2011 findings were not directly comparable with those from previous years. Having used the same methodology in 2011 and 2012, however, means there is a strong comparability between the two sets of findings.

In December 2012, Pobal sent emails to 4,356 early years services and asked them to complete an anonymous online questionnaire. Of this number, 3,137 questionnaires were completed and returned within the required timeframe to be included in this analysis, representing an overall response rate of 72.0%..The data contained herein is based on the information provided by these 3,137 services.

The response rate has declined from 78% in 2011. Although this slight fall is somewhat disappointing, the 72% response rate is still very high for a survey in which recipients are under no obligation to participate and provides a robust basis on which to draw conclusions about the sector as a whole. The decline may be attributable to a number of factors. During 2012, very many of the recipients may have applied for and been declined funding under the Pobal-managed Childcare Capital Programme. The programme was vastly oversubscribed, resulting in only 10% of applicants being approved funding. It is possible that this experience may have (temporarily, it is hoped) made some services less likely to respond to a Pobal survey. There is also likely to be an element of "survey fatigue" within the sector as a number of agencies have circulated links to online surveys on various topics in recent months. As the single largest and most comprehensive survey of the sector on an annual basis, it is important that higher response rates are continually sought and that agencies collaborate to ensure minimal duplication and timing clashes of surveys.

An Irish language version of the questionnaire was also made available. A total of 64 respondents availed of this option.

The breakdown of respondents in Table 1, below, shows a higher response rate amongst community-based services (82%) when compared with their private counterparts (68%). Most community based services have had long experience of being funded through and supported by Pobal so the higher response rate from this category is a recurrent feature of this annual survey. There is a slight decrease in response rates across both community-based and private providers from the 2011 figures, however, this corresponds with the overall decrease in response rates in 2012, when compared with 2011.

Table 1 Response Rates

	2011			2012		
	Community-Based	Private Provider	All	Community-Based	Private Provider	All
No. of Questionnaires Issued	1,274	3,089	4,366	1,235	3,121	4,356
No. of Completed Questionnaires	1,091	2,310	3,401	1,018	2,119	3,137
Response Rate %	86%	75%	78%	82%	68%	72%

2. Profile of Respondents

2.1 Service Types

Of the 3,137 respondents to Pobal's Annual Questionnaire 2012, the ratio of private providers to community-based providers is more than 2:1 (68% (2,119) private providers; 32% (1,018) community based).This trend remains unchanged from the 2011 breakdown of respondents and again supports the comparability of the data from year to year.

2.2 Urban and Rural Providers

All childcare facilities were asked to state whether their facility is located in an urban or rural area. The question provided respondents with 4 categories from which to choose: (i) City/Large Town, (ii) Suburb/Hinterland of LargeTown, (iii) Village/Small Town, and (iv) Rural Area. For the purposes of this report, categories (i) and (ii) are considered "urban" and categories (iii) and (iv) are classed as "rural".

Of the 3,137 respondents, 57.5% (1,803) categorised their location as rural and 42.5% (1,334) as urban. Both community based and private providers have a somewhat higher concentration in rural areas, at 59% and 57%, respectively.

2.3 County Breakdown

Respondents were asked to indicate the county location of their facility. A county breakdown of response rates is available in Appendix I. Of a total of 33 county divisions[1], four counties show a response rate of 90% or higher, with the highest being Waterford City, followed by Roscommon, Monaghan and Wexford. (This is a slight fall from 2011,

[1] The county division breakdown was done in line with City and County Childcare Committee boundaries (of which there are 33 as Galway City and County are counted as a single division).

when eight counties had response rates of 90% or higher.) The lowest response rate was in Dublin City, at 53.2% (a fall from an already low 57% in 2011), followed by Dun Laoghaire Rathdown (54.6%) and Westmeath (56.5%).

2.4 Funding Programmes

Early years services in Ireland are funded under three main funding programmes under the auspices of the Department of Children and Youth Affairs: the free pre-school year in Early Childhood Care and Education (ECCE), the Community Childcare Subvention (CCS) and the Childcare Education and Training Supports (CETS) programmes. Respondents were asked to indicate in which of these programmes their services were participating. A breakdown of these responses can be seen in the Table 2.4, below.

Table 2.4 Breakdown by Funding Scheme

Funding Scheme	Community-Based (CB)	CB %	Private Provider (PP)	PP %	All	%
ECCE (Free Pre-school Year)	903	88.7%	2,098	99.0%	3,001	95.7%
CCS (Community Childcare Subvention)	782	76.8%	-	-	782	25.0%
CETS (Childcare Education and Training Supports)	373	36.6%	540	25.5%	913	29.1%

These figures illustrate the extremely high levels of participation in these funding programmes, particularly in the ECCE programme; 95.7% of respondent services are participating in this programme. Among community providers[2], participation in CCS is also very high, with over three-quarters of such services taking part. 332 services (32.6% of community based services) reported that they were participating across all three programmes.

Apart from demonstrating the considerable "reach" of these funding programmes, it is worth noting that each programme has associated terms and conditions (in terms of times and weeks of service, for example, and in the case of ECCE in relation to the qualification levels of staff). Such aspects of the funding programmes will clearly shape and influence decisions made by service providers and the pattern of service delivery. The possible influence of the specific details of the funding programmes is something that will be returned to later in this report.

[2] Private childcare providers are not eligible to participate in the Community Childcare Subvention Programme.

3. Service Details & Provision

This section examines some aspects of service provision, including the types of service offered by early years facilities, their capacity (in terms of numbers of childcare places available) and the uptake of those places, their numbers of vacancies and/or numbers on waiting lists and also some details on the profile of children availing of the services. Service types offered and details such as days/weeks open will depend on a range of factors, including the demand profile in the local area, the type of premises available, the ethos of the service provider, and so on. Also influential are the funding programmes in which the services operate, specifically the terms and conditions (regarding duration of service, etc.) that are associated with these programmes.

Key Figures

- 109,342 childcare places available in facilities that responded
- Average of 34.9 childcare places available per childcare facility (35.7 in community facilities and 20.9 in private facilities)
- Total of 99,220 children attending the 3,137 facilities
- Average number of children attending per facility is 31.6
- 31% of services report being “full”
- Total of 4,787 children on waiting lists for childcare places required immediately
- Total of 23,614 vacant childcare places nationally
- Services open for an average of 31.6 hours per week
- Services open for an average of 43.2 weeks per year
- 16,911 lone parents accessing childcare services
- 45% of services have at least one child with a disability attending
- 3,229 children with disabilities attending childcare services

3.1 Types of Childcare Provided

Respondents were asked to select the type(s) of childcare offered within their facilities and had the opportunity to choose more than one option from a list. Table 3.1.1, below, shows that over half of all respondents (54.3%) state that they offer a “pre-school/playgroup” service making this the most common response. This percentage has decreased from the 2010 figure of 62.6% and the 2011 figure of 54.3%. The second most common response was “Montessori” at 39.5% (unchanged since 2011 (39.6%)). Over one-quarter of services (28.2%) report offering an “after school” service (up very slightly on the 2011 figure of 27.2%). None of the services responding to the 2012 questionnaire selected “workplace crèche” or “childminding” as reflecting their service type.

Overall the changes between 2011 and 2012 are minimal. The report in 2011 highlighted a number of shifts since 2010 (notably an increase in the proportion of services choosing "Montessori" as their service type and a decrease in those selecting "afterschool"). At the time, it was noted that this change was likely due in large part to the changed profile of respondents between the 2010 and 2011 surveys (the far greater representation in 2011 of private providers). The 2012 findings support this notion and demonstrate relative stability year to year.

Table 3.1.1 Types of Childcare Provided[3]

Type of Service	Overall Percentage (%) 2010	Overall Percentage (%) 2011	Overall Percentage (%) 2012
Crèche/Nursery	45.2%	30.8%	31.6%
Montessori	22.3%	39.6%	39.5%
Playgroup/Pre-school	62.6%	57.1%	54.3%
Naíonra	4.9%	5.2%	6.1%
Workplace Crèche	1.1%	0.9%	0%
Afterschool	50.5%	27.2%	28.2%
Steiner	0.5%	0.4%	0.4%
Breakfast Club	10.1%	5.5%	6.8
Childminding	3.0%	0.9%	0%

Community-based services are more likely to name "preschool/playgroup" as their service type than are private providers (57% and 33.3%, respectively). A higher percentage of services in rural areas (59%) described their services as "preschool/playgroup" than in urban areas (51%).

Anecdotal evidence of a decrease in the provision of school aged childcare (presumably due to reduced demand among parents with reduced incomes) is backed up when one examines the community/private breakdown of these figures (see Table 3.1.2, below). In 2010, 53.6% of community providers reported that they provided afterschool care; the corresponding percentage in 2011 was significantly lower at 39.9% and in 2012 this has decreased further again to 35.1%. Many of the "new" community provider respondents (i.e. those who were not included in the 2010 questionnaire) are pre-school-only services, so this could account for some of the decrease in school age provision, but the fact that there was a continued decline between 2011 and 2012, provides stronger evidence of some attrition in relation to school aged childcare, within the community sector. Section 3.4, below, will return to this issue.

[3] Respondents could choose more than one service type from the options given, therefore totals exceed 100%.

Table 3.1.2 Types of Childcare Provided by Provider Type

Type of Service	Community-Based Childcare Providers	% of CB (N =1,091)	Private Provider Childcare Providers	% of PP (N =2,310)
Crèche/Nursery	358	28.9%	638	20.4%
Montessori	87	7.0%	1,153	36.9%
Playgroup/Pre-school	704	57%	1,040	33.3%
Naionra	124	10.0%	84	2.7%
Workplace Crèche	0	0%	0	0%
Afterschool	434	35.1%	525	16.8%
Steiner	11	0.9%	4	0.1%
Breakfast Club	97	7.9%	133	4.3%
Childminding	0	0%	0	0%

3.2 Childcare Places on Offer

Key Figures
• 109,342 childcare places available in facilities that responded • Average of 34.9 childcare places available per childcare facility (43.3 in community facilities and 30.8 in private facilities)

Respondents were asked to state how many children their service could cater for *in any one day*. This allows determination of the *capacity* of the services (the number of places available, as opposed to the number of places occupied). A total of 3,137 respondents reported **109,342** places, an **average of 34.9 places per facility.** It should be noted that a significant difference exists between private and community facilities with the average number of places available reported at 43.3 and 30.8, respectively.

The average number of places available per facility has increased slightly from last year's figure of 33.4 places per facility. The increase is evident for both private (up from 29.8 to 30.8) and community providers (up from 41.2 to 43.3).

Table 3.2, below, shows a significant fall in the overall average number of places (relative to previous years) was witnessed in 2011. As noted at the time, however, this was largely attributable to the change in methodology of the questionnaire in 2011 (and therefore in the profile of respondents) and was not to be interpreted as evidence of services "shrinking" significantly in size on a widespread basis. Having the 2012 data now allows a more robust comparison and shows a slight increase in average capacity across all categories of service between the end of 2011 and the end of 2012.

Table 3.2 Average Number of Places Available per Facility

	Community	Private	Urban	Rural	All
2008	43.9	40.7	45.7	40.4	43.1
2009	44.6	42.3	46.3	41.1	43.8
2010	50.1	39.8	47.2	46.8	47.0
2011	41.2	29.8	36.2	31.4	33.4
2012	43.3	30.8	38.7	32.0	34.9

3.3 Places Filled – Attendance

Key Figures
• Total of 99,220 children attending the 3,137 facilities • Average number of children attending per facility is 31.6

Respondents reported a total of **99,220 children attending** their facilities.

In previous years, it was often the case that the number of children attending exceeded the number of places available on a given day. (This is because the same place can be occupied on different days by different children.) Although individual services and particular areas may have had vacancies, the national figures showed that there were more children attending than there were places available, on a given day. For the second year running in 2012, the overall numbers attending are lower than the number of places available (99,220:109,342). This is consistent with anecdotal evidence of declining demand in some areas and some services struggling to fill their places, and will be explored further, below.

The **average number of children attending per facility is 31.6, a slight increase on the 2011 average of 30.5**. Again, a decrease had been noted between 2010 and 2011 but was due, at that time, more to the changed profile (and smaller average size) of services participating in the questionnaire than to actual substantial decline in service capacity.

Tables 3.3.1 and 3.3.2 below show the spread of attendance numbers across the different age-groups and service types. The majority of children (65,854; 66.4%) attending all respondent services occupy pre-school (3-5 years) places. This represents a small decrease (from 68.2%) in 2011, prior to which there had been a substantial increase (predominantly due to the change in profile of respondents; many of those “new” to the survey in 2011 were preschool/playgroup-only sessional services). The percentage of all children attending represented by those attending afterschool services has risen from 12.9% in 2011 to 16.2% in 2012.

Table 3.3.1 Attendance Numbers by Childcare Type/ Duration

	Full-Time (>5 hours)	Part-Time (3hrs31mins- 5hrs)	Sessional (3hrs30mins or less)	Total by Age Category
Babies (up to 1 yr)	2,085	866	193	**3,144**
Toddlers (1 and 2 yrs)	6,830	4,834	2,471	**14,135**
Pre-schoolers (3-5 yrs)	11,466	10,767	43,621	**65,854**
School age (6-14 yrs)	N/A	7,110	8,977	**16,087**
Totals Overall	**20,381**	**23,577**	**55,262**	**99,220**

Table 3.3.2 % Attendance by Childcare Type/ Duration

	Full-Time (>5 hours)	Part-Time (3hrs31mins- 5hrs)	Sessional (3hrs30mins or less)	Total by Age Category
Babies (up to 1 yr)	2.1%	0.9%	0.2%	**3.2%**
Toddlers (1 and 2 yrs)	6.9%	4.9%	2.5%	**14.2%**
Pre-schoolers (3-5 yrs)	11.6%	10.9%	44.0%	**66.4%**
School age (6-14 yrs)	N/A	7.2%	9.0%	**16.2%**
Totals Overall	**20.6%**	**23.9%**	**55.7%**	**100%**

Of all of the children attending the services responding to the questionnaire, 41.8% (41,514) of them are attending community based services and 58.2% (57,706) are attending private services. A breakdown of the age groups and types of service being taken up in community and private services can be found in Appendix III.

3.4 Occupancy Levels – Waiting Lists and Vacancies

Key Figures

- 30.8% of services report being "full"
- 29.8% of community facilities full; 31.3% of private facilities full
- 36% of urban facilities full; 26.9% of rural facilities full
- Total of 4,787 children on waiting lists for childcare places required immediately
- Total of 23,614 vacant childcare places nationally

Full Occupancy of Available Places

At the time of completing these questionnaires, **fewer than one-third (30.8%) of respondents reported their services to be "full"**[4] (see Table 3.4.1, below). This figure has decreased for the first time in four years during which it remained relatively unchanged (2008: 35.1%; 2009: 35.5%; 2010: 35.5%; 2011: 36%). This suggests that overall, in terms of services being full, the situation has slightly worsened for the first time since 2008. It should be noted, however, that this is a relatively crude measure of the extent of service uptake, and does not provide an indication of the extent of the vacancies at service level (i.e. the same service might be "not full" over a number of years, but the number of vacancies it has may have increased or decreased over that time).

Table 3.4.1: Services who reported being "full"[5] – Community/Private, Urban/Rural and all Facilities

	Community-Based	Private Providers	Urban	Rural	Total
Number of Services	286	616	447	455	**902**
%	29.8%	31.3%	36.0%	26.9%	**30.8%**

The proportion of community-based providers (29.8%) reporting that they are full is somewhat lower than is the case for private providers (31.3%). This represents a reversal of the pattern evident in 2011[6]. Although it has decreased since 2011, the gap between urban and rural services remains significant; 36% of urban-based respondents reported having a full uptake on places available, while 26.9% of rural-based services reported likewise. This highlights, as has been the pattern in previous years' surveys, the additional challenges faced by rural services in remaining sustainable.

Waiting Lists

Services that reported being full were then asked how many (if any) children are on waiting lists for places required immediately in their facilities (as distinct from those waiting for places at a later date). **A total of 4,787 children were reported to be on waiting lists** (see Table 3.4.2a, below). A decrease in the overall number reported to be on waiting lists from that in 2011 is to be expected, given the lower response rate in 2012. The drop, however, has been significant (from 7,616 to 4,787) and represents a decrease in the average number awaiting places per service from 2.2 to 1.5 (a 32% fall). Of the total number on waiting lists, over one-third (34.2%) are on waiting lists for sessional places, a decrease on the 2011 percentage of (37.5%). This is followed by part-time places (31.4%). Those waiting for school age places make up the smallest category (9.3%), see Table 3.4.2b, below.

The highest proportion, almost three-quarters (73.4%; 3,514), of those on waiting lists are waiting for a place in an urban-based childcare service. The spread of numbers on waiting lists also varies considerably between community and private settings; where almost half (49.9%: 833) of those waiting on places in private services are seeking a sessional place, whereas in community services the largest grouping (35.5%: 1,106) is waiting for part-time places.

[4] The question asked: "Is your service currently full?"
[5] 2,929 respondents answered this question
[6] In 2011, 38.9% of community based services and 34.7% of private providers reported full occupancy.

Table 3.4.2a Waiting Lists by Childcare Type for those who reported as being "full"

Waiting Lists	Full-Time	Part-Time	Sessional	School Age	Totals
Community-Based	847	1,106	806	358	3,117
Private Providers	354	394	833	89	1,670
Urban	934	1,193	1,051	336	3,514
Rural	267	307	588	111	1,273
Total	1,201	1,500	1,639	447	4,787

Table 3.4.2b: Details of Children on a Waiting List for an Immediate Place

All Respondents	Number of Places Sought	Places Sought as % of Total Places Sought
Full-Time	1,201	25.1%
Part-Time	1,500	31.4%
Sessional	1,639	34.2%
Afterschool	447	9.3%
Totals/ All:	**4,787**	**100.0%**

A further breakdown of the numbers on waiting lists (by community/private, urban/rural and by type of service required) is available in Appendix II.

Vacancies

The (2,027) services that reported being "not full" were then asked to give a breakdown of the numbers (if any) of vacancies they had, broken down by childcare type. The figures are shown in Table 3.4.3a, below. **Services reported a total of 23,614 vacant childcare places.** Despite the lower response rate in 2012, the number of reported vacancies has increased since 2011 (from 22,456) and represents an increase in the average number of vacancies per service from 6.6 to 7.6. Over two-thirds (68%) of these places are in private childcare services, and 59.8% (14,122) of all vacancies are in rural areas. This pattern remains relatively unchanged from 2011 and continues to present a stark picture of the ongoing (indeed perhaps intensifying) challenges facing some parts of the childcare sector as a result of the economic downturn and reduced family incomes translating into reduced demand for centre-based childcare.

Almost half (45.2%) of all vacant childcare places are sessional places. The remainder are spread relatively evenly across full-time, part-time and school age services (see Table 3.4.3b, below).

Table 3.4.3a Vacancies by Childcare Type for those who reported not being “Full” – Community/Private, Urban/Rural and all Services

Vacancies	Full-Time	Part-Time	Sessional	School Age	Totals
Community-Based	1,027	1,832	3,056	1,579	**7,494**
Private Providers	3,286	2,343	7,610	2,881	**16,120**
Urban	1,901	1,955	3,814	1,822	**9,492**
Rural	2,412	2,220	6,852	2,638	**14,122**
Total	**4,313**	**4,175**	**10,666**	**3,907**	**23,614**

Table 3.4.3b Vacancies by Childcare Type – Number and Percentage

Childcare Type	Number of Vacant Childcare Places	% of all Vacancies
Full-Time	4,313	18.3%
Part-Time	4,175	17.7%
Sessional	10,666	45.2%
Afterschool	4,460	18.8%
Totals/ All	**23,614**	**100.0%**

The data presented on waiting lists and vacancies, above, highlights the fact that, in some areas and for some types of childcare service, there continues to be a mismatch at present between levels of demand and supply. Some services have waiting lists for some or all types of childcare on offer; others are struggling to fill sufficient places to remain sustainable.

A county breakdown of waiting list and vacancy figures provides some insights into the distribution of supply and demand. The following set of tables provides this data. It should be noted, however, that county-level data can mask significant variation; the same county can have both pockets of unmet demand and areas of current over-supply. Obviously, it is also important to remember that these figures represent 72% of all services nationally with individual counties varying in the extent to which their services are represented from 56.5% up to over 90%.

What is shown by this data is a widely varying pattern around the country. Numbers on waiting lists vary from a low of 4 in Leitrim to the highest number at 1,120 in Dublin City. (Bearing in mind the relatively low response rate to the survey in Dublin City, the likelihood is that this already high number significantly under-represents the reality). South Dublin and Galway also have high numbers on waiting lists (at 480 and 391, respectively). Relative to the size/population of their county, the numbers on waiting lists in Carlow (249) is relatively high (see Table 3.4.4, below).

Every county is showing a significant level of current over-supply of childcare places. The most stark example is Cork County, where services have reported 1,922 vacancies at the end of 2012, 60% of them in private childcare services. Other counties with high numbers of unoccupied places are Galway (1,166), Donegal (1,186), Meath (1,173), Kildare (1,262), Westmeath (1,036) and Kerry (1,060).

The comparison of waiting list and vacancy numbers highlights some seemingly anomalous patterns within individual counties. Looking closer at the Dublin City figures, for example, it can be seen that there are 1,120 children waiting on places, the vast majority (79%) of whom are waiting on places in community childcare services. Meanwhile, there are also 1,204 vacant childcare places in the city, 65% of which are in private childcare services. It is not possible with this data to do a further drill-down to examine where (geographically) the waiting lists and vacancies arise. It may well be the case that there are pockets of over-supply and pockets of under-supply within the city area.

There appears to be an overall drop in the number of children on a waiting list, across the board, when compared with 2011 figures. However, it must be noted that in some cases a direct comparison should not be drawn given the difference in response rates for some counties when comparing 2011 and 2012 data. Despite showing a 20% decrease in responses on 2011, Tipperary South shows the most significant drop on numbers waiting for a childcare place from 248 in 2011 to only 20 in 2012. Other counties showing significant reductions are Clare (down 78% on 2011), Sligo (down 70% on 2011) and Mayo (down 67% on 2011) while other counties such as Louth, Limerick City and County, Dublin City and Cork County show decreases of between 40% and 60% despite showing no significant change in response rates from 2011. When comparing the figures for vacancies with 2011, the most significant difference can be seen in Westmeath despite showing no sizeable drop in response rates. Vacancies rose from 432 in 2011 to 1036 in 2012 (an increase of 140%). Westmeath shows a drop of just under 50% in its overall waiting list number which in itself cannot negate the rise in the number of vacancies. Other counties showing sizeable increases on the number of vacancies, when compared with 2011, are Roscommon with a 112% increase (133 to 282), Mayo, Kildare and Donegal with 30% to 40% increases on vacancy numbers. Carlow, Cork County and Kilkenny all showed a decrease on vacancies on 2011 with Carlow dropping by two-fifths and Cork County and Kilkenny each dropping by around one-third.

Based on the significant variation in response rates across counties, an extrapolation has been done calculating what the county and overall totals could be across 100% of services. (Obviously this involves an assumption that non-responding services are not different from responding services in any significant way when it comes to levels of vacancies and numbers on waiting lists, and must be interpreted with that in mind.) What this suggests is that the national totals for numbers on waiting lists could be approximately 6,650 and for numbers of vacancies could be as high as 32,800. It suggests that Dublin City may have over 2,100 children on waiting lists *and* over 2,200 vacancies

Table 3.4.4 Waiting Lists and Vacancies by County and by Community/Private Service Type & Extrapolation (Based on County Response Rates)

County	Response Rate	Waiting Lists				Vacancies			
		Private	Community	Total	Extrapolation[7]	Private	Community	Total	Extrapolation
Carlow	79.2%	4	245	**249**	314	92	106	**198**	250
Cavan	69.7%	3	59	**62**	89	473	91	**564**	809
Clare	74.5%	18	16	**34**	46	485	397	**882**	1,184
Cork City	88.3%	18	106	**124**	140	264	222	**486**	550
Cork County	69.3%	226	91	**317**	457	1,158	764	**1,922**	2,773
Donegal	80.7%	22	84	**106**	131	697	489	**1,186**	1,470
Dublin - City	53.2%	231	889	**1,120**	2,105	777	427	**1,204**	2,263
Dublin - Dun Laoghaire Rathdown	54.6%	121	142	**263**	482	277	59	**336**	615
Dublin – Fingal	56.5%	153	72	**225**	398	741	177	**918**	1,625
Dublin - South Dublin	82.0%	114	366	**480**	585	774	188	**962**	1,173
Galway	74.0%	162	229	**391**	528	751	415	**1,166**	1,576
Kerry	80.0%	28	79	**107**	134	544	516	**1,060**	1,325
Kildare	69.4%	76	15	**91**	131	1,208	54	**1,262**	1,818
Kilkenny	76.0%	29	131	**160**	211	313	198	**511**	672
Laois	76.8%	17	51	**68**	89	542	39	**581**	757
Leitrim	74.3%	0	4	**4**	5	81	137	**218**	293
Limerick City	81.3%	44	16	**60**	74	561	134	**695**	855

[7] This extrapolation is done on the basis of the response rate in each individual county. In Carlow, for example, the total number on waiting lists was found to be 249, but this figure is based on 79.2% of services in Carlow having responded to the survey. An inference is then drawn that, had 100% of Carlow services responded, the number would have been 314.

Table 3.4.4 Waiting Lists and Vacancies by County and by Community/Private Service Type & Extrapolation (Based on County Response Rates) Cont'd

County	Response Rate	Waiting Lists				Vacancies			
		Private	Community	Total	Extrapolation[8]	Private	Community	Total	Extrapolation
Limerick County	73.0%	43	36	79	108	394	177	571	782
Longford	91.7%	0	19	19	21	155	205	360	393
Louth	70.9%	33	89	122	172	720	133	853	1,203
Mayo	80.2%	29	7	36	45	260	360	620	773
Meath	67.0%	96	0	96	143	1,078	95	1,173	1,751
Monaghan	93.1%	0	44	44	47	220	344	564	606
Offaly	75.7%	4	2	6	8	222	111	333	440
Roscommon	94.4%	11	99	110	117	148	134	282	299
Sligo	73.9%	5	47	52	70	221	113	334	452
Tipperary North	79.7%	38	32	70	88	299	90	389	488
Tipperary South	77.0%	12	8	20	26	305	245	550	714
Waterford City	97.5%	2	54	56	57	217	132	349	358
Waterford County	89.5%	30	17	47	53	190	157	347	388
Westmeath	72.5%	27	12	39	54	700	336	1,036	1,429
Wexford	80.1%	40	31	71	89	565	316	881	1,100
Wicklow	77.8%	34	25	59	76	688	133	821	1,055
Total	72.0%	1,670	3,117	4,787	6,649	16,120	7,494	23,614	32,797

[8] This extrapolation is done on the basis of the response rate in each individual county. In Carlow, for example, the total number on waiting lists was found to be 249, but this figure is based on 79.2% of services in Carlow having responded to the survey. An inference is then drawn that, had 100% of Carlow services responded, the number would have been 314.

The next two tables provide a further breakdown at county level, showing the numbers on waiting lists for, and numbers of vacant places in, the different service types in both community childcare services (Table 3.4.5) and private childcare services (Table 3.4.6). Dublin City has the largest numbers on waiting lists for community childcare services (889), followed by South Dublin (366). (Again, it is worth noting that the real numbers on waiting lists in both areas are likely to be substantially higher given the lower response rate to the survey in these counties relative to other counties.) In terms of vacancies, community-based services in Cork County and Kerry are reporting high levels of vacancies (764 and 516, respectively). These patterns are in line with those found in 2011 (see Table 3.4.7, below).

Numbers of vacancies in private childcare services were highest in Kildare (1,208), Cork County (1,158), Meath (1,078) and Dublin City (777). Counties in the greater Dublin area (Meath, Kildare, and Wicklow) show high numbers of vacancies in private childcare services, although it should be noted that these counties have relatively high numbers of such services. Leitrim and Carlow are the counties with the smallest numbers of vacancies in private childcare services and do not appear to have the same levels of current over-supply of childcare places as some other areas around the country.

Table 3.4.5 Waiting Lists and Vacancies by County and Childcare Type – Community Childcare Providers

COMMUNITY	Waiting Lists					Vacancies				
County	Full-Time	Part-Time	Sessional	School Age	Total	Full-Time	Part-Time	Sessional	School Age	Total
Carlow	55	66	80	44	**245**	15	16	47	28	**106**
Cavan	11	31	7	10	**59**	18	27	43	3	**91**
Clare	3	9	4	0	**16**	71	72	138	116	**397**
Cork City	9	44	42	11	**106**	30	66	93	33	**222**
Cork County	17	21	38	15	**91**	119	230	279	136	**764**
Donegal	23	31	30	0	**84**	26	19	350	94	**489**
Dublin - City	349	366	93	81	**889**	67	177	130	53	**427**
Dublin - Dun Laoghaire Rathdown	32	77	28	5	**142**	5	14	37	3	**59**
Dublin – Fingal	12	17	43	0	**72**	15	63	83	16	**177**
Dublin - South Dublin	100	132	75	59	**366**	24	53	54	57	**188**
Galway	75	45	101	8	**229**	18	73	244	80	**415**
Kerry	12	0	33	34	**79**	86	111	171	148	**516**
Kildare	0	3	8	4	**15**	13	13	21	7	**54**
Kilkenny	17	15	69	30	**131**	12	51	84	51	**198**
Laois	2	19	12	18	**51**	0	14	17	8	**39**
Leitrim	0	0	4	0	**4**	24	15	51	47	**137**
Limerick City	0	0	16	0	**16**	24	71	39	0	**134**
Limerick County	6	12	18	0	**36**	2	19	126	30	**177**
Longford	5	0	5	9	**19**	39	87	16	63	**205**
Louth	20	69	0	0	**89**	27	57	39	10	**133**
Mayo	0	1	6	0	**7**	15	28	211	106	**360**
Meath	0	0	0	0	**0**	9	28	43	15	**95**
Monaghan	20	18	0	6	**44**	68	81	81	114	**344**
Offaly	0	0	2	0	**2**	18	4	69	20	**111**
Roscommon	43	18	35	3	**99**	25	4	93	12	**134**
Sligo	12	20	13	2	**47**	6	15	69	23	**113**
Tipperary North	11	15	6	0	**32**	21	33	31	5	**90**
Tipperary South	3	1	4	0	**8**	53	40	105	47	**245**
Waterford City	5	49	0	0	**54**	26	43	44	19	**132**
Waterford County	0	10	2	5	**17**	28	15	64	50	**157**
Westmeath	5	5	2	0	**12**	47	170	56	63	**336**
Wexford	0	10	21	0	**31**	57	103	77	79	**316**
Wicklow	0	2	9	14	**25**	19	20	51	43	**133**
Total	847	1,106	806	358	3,117	1,027	1,832	3,056	1,579	7,494

Table 3.4.6 Waiting Lists and Vacancies by County and Childcare Type – Private Childcare Providers

PRIVATE PROVIDERS	Waiting Lists					Vacancies				
County	Full-Time	Part-Time	Sessional	School Age	Total	Full-Time	Part-Time	Sessional	School Age	Total
Carlow	1	0	3	0	**4**	14	13	50	15	**92**
Cavan	0	2	1	0	**3**	148	81	140	104	**473**
Clare	3	5	5	5	**18**	59	61	296	69	**485**
Cork City	5	0	13	0	**18**	68	41	128	27	**264**
Cork County	66	37	99	24	**226**	100	192	653	213	**1,158**
Donegal	5	3	9	5	**22**	139	86	330	142	**697**
Dublin - City	115	85	16	15	**231**	212	109	354	102	**777**
Dublin - Dun Laoghaire Rathdown	22	50	39	10	**121**	100	55	89	33	**277**
Dublin - Fingal	16	18	115	4	**153**	112	74	431	124	**741**
Dublin - South Dublin	12	28	71	3	**114**	151	123	377	123	**774**
Galway	44	59	55	4	**162**	195	110	277	169	**751**
Kerry	0	0	28	0	**28**	113	100	198	133	**544**
Kildare	19	4	42	11	**76**	306	181	544	177	**1,208**
Kilkenny	8	5	16	0	**29**	45	24	203	41	**313**
Laois	5	0	12	0	**17**	81	52	279	130	**542**
Leitrim	0	0	0	0	**0**	21	15	18	27	**81**
Limerick City	0	0	44	0	**44**	155	113	185	108	**561**
Limerick County	0	0	43	0	**43**	117	51	183	43	**394**
Longford	0	0	0	0	**0**	36	12	80	27	**155**
Louth	4	10	15	4	**33**	112	169	337	102	**720**
Mayo	5	7	17	0	**29**	48	33	130	49	**260**
Meath	3	8	85	0	**96**	199	84	604	191	**1,078**
Monaghan	0	0	0	0	**0**	72	43	72	33	**220**
Offaly	0	0	4	0	**4**	6	15	148	53	**222**
Roscommon	5	2	3	1	**11**	36	13	64	35	**148**
Sligo	0	0	5	0	**5**	80	28	79	34	**221**
Tipperary North	7	7	24	0	**38**	41	24	176	58	**299**
Tipperary South	0	0	12	0	**12**	64	46	151	44	**305**
Waterford City	0	2	0	0	**2**	71	49	55	42	**217**
Waterford County	0	19	11	0	**30**	22	46	87	35	**190**
Westmeath	0	25	2	0	**27**	124	79	341	156	**700**
Wexford	9	6	22	3	**40**	112	104	214	135	**565**
Wicklow	0	12	22	0	**34**	127	117	337	107	**688**
Total	354	394	833	89	1,670	3,286	2,343	7,610	2,881	16,120

Table 3.4.7 County Breakdown of Waiting Lists and Vacancies (Comparison 2011/12)

County	2011			2012		
	No. of Responses	Total No. on Waiting List	Total No. of Vacancies	No. of Responses	Total No. on Waiting List	Total No. of Vacancies
Carlow	45	309	325	38	249	198
Cavan	53	92	573	46	62	564
Clare	123	156	892	105	34	882
Cork City	90	191	721	83	124	486
Cork County	276	561	1958	251	317	1,922
Donegal	116	189	827	121	106	1,186
Dublin - City	222	1433	943	208	1,120	1,204
Dublin - Dun Laoghaire Rathdown	116	182	401	102	263	336
Dublin - Fingal	225	697	831	179	225	918
Dublin - South Dublin	233	669	1137	187	480	962
Galway	193	435	1283	196	391	1,166
Kerry	122	199	1026	104	107	1,060
Kildare	153	134	969	150	91	1,262
Kilkenny	76	135	771	76	160	511
Laois	70	152	563	63	68	581
Leitrim	28	38	162	26	4	218
Limerick City	48	146	525	39	60	695
Limerick County	114	138	654	92	79	571
Longford	34	48	369	33	19	360
Louth	93	203	782	83	122	853
Mayo	99	110	445	97	36	620
Meath	148	168	1122	138	96	1,173
Monaghan	56	88	603	54	44	564
Offaly	56	47	421	53	6	333
Roscommon	39	88	133	51	110	282
Sligo	53	178	361	51	52	334
Tipperary North	65	63	394	59	70	389
Tipperary South	72	248	507	57	20	550
Waterford City	30	152	292	39	56	349
Waterford County	53	46	242	51	47	347
Westmeath	60	68	432	66	39	1,036
Wexford	102	51	1038	113	71	881
Wicklow	138	202	754	126	59	821
Total	3,401	7,616	22,456	3,137	4,787	23,614

3.5 Details of Service Provided

Respondents were asked to provide details of their service hours and how many weeks they open per year.

Key Figures
• Services open for an average of 31.6 hours per week • Community services open for an average of 32.3 hours per week; private services open for an average of 30.7 hours per week • Services open an average of 43.2 weeks per year

3.5.1 Opening Hours per Week

Respondents were asked for the total number of hours their facilities opened per week. According to their responses (see Table 3.5.1a, below), facilities across the sector now **open for an average of 31.6 hours per week**, an increase of just over one hour on the 2011 average (of 30.3 hours). There had been a significant decline in average opening hours from 2010 (37.5 hours) and preceding years. This is likely to have been largely the result of the changed profile of respondents (larger numbers of smaller, sessional-only services participating), although there may also have been some element of fall off in demand for full-time services and increased focus on sessional care in line with the structure of the ECCE programme.

The proportion of services that reported being open and available to care for children between 15-24 hours per week (44.3%) has not changed since 2011 (44.1%). Services open for 40 hours per week per week or more represent just under one-third of all services (31.5%, up slightly from 30% in 2011). Less than 1% of services operate for fewer than 15 hours per week.

Just under half of the private providers responding to this questionnaire (48.9%) reported opening for 15-24 hours per week, compared with one-third (34.1%) of community based services.

Table 3.5.1a: Hours of Operation per Week

	Community-based	Private Provider	Urban	Rural	All
Fewer than 15 hours	0.7%	1.0%	0.5%	1.2%	0.9%
15-24 hours	34.1%	48.9%	36.4%	49.7%	44.1%
25 to 40 hours	34.4%	18.3%	28.1%	20.3%	23.5%
Over 40 hours	30.8%	31.8%	35.0%	28.8%	31.5%
Average	32.3	30.7	33.7	29.9	31.6

The average private facility opens for 1.6 hours fewer each week than its community-based counterpart, although the gap has narrowed somewhat (from 3.3) since 2011. As noted in previous years, community based services tend to be spread quite evenly across the shorter, medium and longer hours of opening, whereas private providers are more likely to fall either into "short service" (less than 25 hours per week) or "long service" (more than 40 hours per week) brackets. Urban services also operate for an average of 3.8 hours longer per week than rural services, a gap that has widened slightly (from 2.2 hours) since 2011.

In Section 2.4 above it was noted that the DCYA funding programmes, in which the vast majority of childcare services are now participating, each involve conditions relating to hours and/or weeks of operation for participating services. It is interesting, therefore to observe the pattern of service offered in facilities that are participating in the different programmes (see Table 3.5.1b, below). As might be expected, services participating in *only* the ECCE programme have the lowest average number of hours of operation, at 23.8 (unchanged from the 2011 average). Many of these services are sessional only and in some cases do not offer any hours over and above those covered by the ECCE payment directly from DCYA. Services participating in CETS have the longest average number of operating hours at 47.2, which is also to be expected, given that the services are specifically contracted to offer childcare places while parents attend training/education courses, most often on a full day basis.

Table 3.5.1b: Average Number of Hours of Operation per Week – by Participation in DCYA Funding Programmes

Service participating in:	Number of Services[9]	Average number of hours open per week
ECCE only	1,788	23.8
CCS	782	36.9
CETS	913	47.2
Overall	3,137	31.6

3.5.2 Weeks Open per Year

Respondents were asked to indicate the number of weeks per year that they operate. The **average number of weeks open is 43.2** (see Table 3.5.2a, below). Weeks open are somewhat higher among community (44.4) than private (42.6) providers and slightly higher in urban (44.0) than rural (42.5) areas. Of 3,137 respondents to this question, 30.0% (944) reported that they open for 50 weeks or longer per year. Just over one-tenth (10.9%) open for between 46 and 49 weeks per year and almost three-fifths (58.9%) open for fewer than 46 weeks per year. It is notable that private providers tend to cluster more in the shortest and longest opening categories than in the middle (46-49 weeks/year) relative to community services who are spread more evenly across all categories. The latter shows little change from the figures reported in 2011 where the average weeks open per year was 43.

[9] Numbers do not add to 3,137 as some services participate in both CETS and CCS and are therefore counted in both categories.

Table 3.5.2a: Weeks Open per Year

	Community	Private Provider	Rural	Urban	All
< 46 weeks	46.4%	64.0%	64.0%	52.0%	58.9%
46-49 weeks	24.2%	10.3%	10.3%	11.8%	10.9%
50 weeks +	29.4%	25.7%	25.7%	36.2%	30.2%
Average Weeks Open	44.4	42.6	42.5	44.0	43.2

As expected, there is a significant difference in the average number of weeks of operation of services participating in the various funding programmes (see Table 3.5.2b, below). Services participating only in the ECCE programme (which is largely based on a 38-week model) open for an average of 40 weeks per year. The CCS is based on a 46-week model[10] so it is unsurprising that the average number of weeks open among services participating in this programme is exactly 46. Services participating in CETS (made up primarily of community-based services and the full-day care / longer opening private providers) are open for an average of 49 weeks per year. Such patterns are significant because they illustrate the extent to which the specific terms of funding programmes can influence service patterns and availability of services for families. There is anecdotal evidence that in recent years some sessional ECCE-only services have reduced their weeks of operation to align with the programme's 38-week model as they found parents were unwilling to pay for additional weeks beyond those covered by the ECCE payment. Again, these figures are similar to patterns reported in 2011.

Table 3.5.2b: Average Number of Weeks Open per Year– by Participation in DCYA Funding Programmes

Service participating in:	Number of Services[11]	Average number of weeks open per year
ECCE Only	1,788	40
CCS	782	46
CETS	913	49

Details of Afterschool Programme of Activities

The 2012 questionnaire asked, for the first time, (of those services offering afterschool care) for some details of the programme of activities offered to children attending after school. Respondents were presented with a list of activity types from which they could tick as many as applied. A total of 1,160 services gave information on their afterschool activities and the breakdown of responses can be seen in Table 3.5.3, below. The most popular activities reported were crafts (90%), reading corner (89.7%) and board games (87.2%). 85% of afterschool services reported having homework as an activity.

The pattern of responses from community and private services show that for most activity types, community services are somewhat more likely to have them on offer (e.g. both indoor and outdoor sports, board games, crafts and drama) than are private services. Activities that were reported by a somewhat higher proportion of private than

[10] Services may still participate in CCS if they offer fewer than 46 weeks' service per year, but their CCS funding is adjusted downwards pro-rata based on the number of weeks actually open.
[11] Numbers do not add to 3,137 as some services participate in both CETS and CCS and are therefore counted in both categories.

community respondents were homework and television. Three-quarters of private providers (74.3%) offer a hot meal as part of their afterschool service; a slightly lower 69.2% of community services do likewise.

Table 3.5.3 Afterschool Activities

Activity	Community	% CB	Private	%PP	Total	Overall %
Hot Meal	324	69.2%	514	74.3%	838	72.2%
Homework Club	378	80.8%	611	88.3%	989	85.3%
Sports or Outdoor Activities	391	83.5%	531	76.7%	922	79.5%
Gym or Indoor Sports	148	31.6%	146	21.1%	294	25.3%
Drama	168	35.9%	222	32.1%	390	33.6%
Board Games	429	91.7%	583	84.2%	1,012	87.2%
Crafts	438	93.6%	606	87.6%	1,044	90.0%
Computer / Electronic Games	255	54.5%	269	38.9%	524	45.2%
TV	188	40.2%	312	45.1%	500	43.1%
Reading Corner	421	90.0%	620	89.6%	1,041	89.7%
Chat or Chill out Space	374	79.9%	554	80.1%	928	80.0%
Other	127	27.1%	146	21.1%	273	23.5%

3.6 Profiles of Families Accessing Funded Childcare Services

Key Figures
• 16,911 lone parents accessing childcare services • 45% of services have at least one child with a disability attending • 3,818 children with disabilities attending childcare services • 13.8% of services have at least one child from the Travelling community attending • Total of 2,084 Traveller children attending

Some questions are included in the questionnaire to help build a profile of children and families availing of early years services. While not all childcare providers are fully aware of the circumstances of the parents accessing their services, respondents are asked to give information to the best of their knowledge. This section covers lone parents, minority groups such as Travellers, and children with a disability.

3.6.1 Lone Parents

Access to affordable childcare is a significant issue for lone parent families. There are over 215,000 lone parent families in Ireland (CSO, 2012a) and 15.4% of pre-school aged children live in lone parent households (CSO, 2012b). According to the CSO Survey of Income and Living Conditions (2010), lone parent households continue to experience the highest levels of deprivation (at 49.8%) of any household type in Ireland. Access to quality and affordable childcare is significant on a number of levels, particularly in providing the children of lone parents with quality early years experiences and the benefits that are shown to flow from that, but also in helping their parents to break the cycle of disadvantage by being able to participate in education, in training or in employment.

A total of 2,757 providers' responded to this specific question reported a total number of 16,911 lone parents accessing their services. This equates to being an average of 6.1 lone parents per service across services who reported having lone parents access their facility. This marks a decrease on the 2011 figure of 7.3 lone parents per facility. There is a significant difference in the numbers of lone parent families reported to be availing of community based services relative to private services. 67.6% (11,438) of the total lone parent families reported by respondents are accessing community-based childcare, while just 32.4% (5,473) of the total lone parents accessing childcare are using private providers. These figures are all the more stark because private provider respondents to the survey outnumber community based respondents by more than two to one. The fact that lone parents are eligible to avail of subvention (only available to community-based facilities) is undoubtedly a contributory factor.

3.6.2 Children with a Disability

Services were asked to provide details of the number of children with special needs (as diagnosed by the HSE) currently attending their services (see Table 3.6.2a, below). A number of categories of disability were also listed and respondents were asked to identify the type(s) of disability involved. This information is important in terms of establishing the extent to which children with disabilities are currently participating in centre-based childcare settings. It is also important to inform future approaches to equipping and informing childcare services and practitioners, so that they can best meet the needs of the children attending their services.

In response to this question, 45% (1,406) of all services were found to have at least one child with a disability in attendance. A total of 3,818 children with disabilities of varying types were accessing their services. The attendance is higher within the community sector, where 55% of all services report having at least one child with a disability attending, as compared with 45% of all private providers. The largest single category is that of "autism spectrum" disabilities; respondents reported a total of 1,209 children with this type of disability attending their services.

Table 3.6.2a Numbers of Children with Disabilities Attending Childcare Services – by Community/Private and by Type of Disability

	Community	Private	Total
No. of Services with any Child(ren) with a Disability Attending*	528	878	1,406
% of services with any Child(ren) with a Disability Attending	52%	41%	45%
Number of Children with:			
Physical Disability	192	183	375
Sensory Disability	238	149	387
Autism Spectrum	634	575	1,209
Downs Syndrome	182	220	402
Learning Disability	590	291	881
Other Disability	273	291	564
Total	2,109	1,709	3,818

Note: 103 Services reported to have at least one child with a disability attending but provided no numbers of children attending.

Services that had indicated that at least one child with a disability attends their service were then asked some further questions in relation to additional supports (if any) available to the children and to the services. The first of these asked how many (if any) Special Needs Assistants (SNAs) the service has (see Table 3.6.2b, below). With 463 services responding to this question, a total of 616 SNAs were reported. Of this number, 376 were reported to be working in (306) private facilities, compared with 240 in (157) community based services. Respondents were then asked how many hours of special needs assistance the service has. With 463 services reporting to have at least one SNA, a total of 4,570 SNA hours were reported.

Table 3.6.2b No. of SNAs and SNA Hours by Service Type and Urban/Rural

	N =	Community	Private	Rural	Urban	All
No of SNAs	463	240	376	363	253	616
No of SNA Hours	448	1,875	2,695	2,591	1,979	4,570

Services who reported to have one or more special needs assistants, were asked to state where the funding for the post comes from. Table 3.6.2c below, sets out the responses from the 463 services who reported to having one or more SNAs. From this table, we can see that the vast majority of funding for these posts are from the HSE with 154 services followed by Enable Ireland with 116 services in receipt of funding for these posts. More interesting to note, just a quarter of services with one or more SNAs are funded by the parents or the services themselves. Of those who answered ‘other’, organisations, such as the Irish Wheelchair Association, Brothers of Charity and Western Care Association, were listed as three of the most common organisations to fund SNA’s.

Table 3.6.2c

Funding for SNAs	N =	%
Services with one or more SNA	463	14.8%
HSE	154	33.3%
Down Syndrome Ireland	8	1.7%
Enable Ireland	116	25.7%
Dept. Of Education and Skills	25	5.4%
Parents	63	14.3%
Service	64	14.5%
Other	105	19.9%

Services were also asked if they received any additional financial support (apart from access to special needs assistant(s)) as a result of having a child/ children with special needs attending. A total of 1,348 (43%) of all services reported 'No' while less than 1% (28) reported 'Yes'. The vast majority of those who said 'Yes', listed the HSE as the source of additional funding with (25) followed by the Brothers of Charity with (2) services and one service listed Down Syndrome Ireland.

3.6.3 Travelling Community

The Travelling community in Ireland continues to suffer from a significant level of educational disadvantage. The OECD in its thematic review of early education and care in Ireland stated that "the level of educational achievement of Traveller children is a matter of deep concern. The low enrolment rates of Traveller children in pre-schools and the infant school suggest that most Traveller children are entering primary school already at a great disadvantage…" (OECD, 2004, p. 8). Current policy is that Traveller children should receive their education, including their pre-school education, "within an integrated provision that welcomes them as equal participants and also respects their culture" (DES, 2006, p.96). The challenge of realising this goal is a persistent one. Now that Ireland has its first universal preschool programme in place (in the form of the ECCE free preschool year) it is particularly pertinent to examine the levels of participation of Traveller children (and indeed other minority groups) in early years settings. Figures are not currently available on the percentage uptake of the free preschool year among Traveller children but it is highly likely that it is well below that of the wider population.

Respondents to the questionnaire were asked to indicate how many (if any) Traveller children were attending their facilities. A total of 432 (or 13.8% of all services) reported having at least one child from the Travelling Community attending. In total, 2,084 Traveller children were attending across all of these services. The breakdown of this figure between community-based and private-providers is highly uneven as has been the case in all previous years. While

29.4% of community-based respondents have at least one child in attendance from this cohort, just 7.2% of private providers reported likewise. Urban facilities are more likely to have a Traveller child accessing their service (18.6%) than are rural services (10.1%).

Census 2011 enumerated 29,573 Irish Travellers in the Republic of Ireland, representing 0.64% of the total population. (Traveller representatives posit a number closer to 36,000 (0.8%)). Interestingly, according to this survey, the proportion of all children attending early years services who are Travellers is 2%. However it should be noted that this relatively high proportion may be in some part accounted for by the fact that the age profile of Travellers is disproportionately young, e.g. there are comparatively few Travellers over the age of 50 according to the recent ESRI report on Multiple Disadvantage in Ireland (2012).

3.6.4 First Language is neither English nor Irish

Respondents were asked how many children attending their service have neither English nor Irish as their first language. (2012 was the first year in which this question was asked as part of the survey.) A total of 1,806 (57.6%) of services were found to have at least one such child attending with an overall total of 10,678 children who have neither English nor Irish as their first language (see Table 3.6.4, below). This represents just over one-tenth of total attendance (10.8%) across all services, which is a substantial proportion and indicates a real challenge for services and practitioners in being able to adequately include all children and provide for their early language and literacy development. The difference between community and private services is not significant (57.2% of private services and 58.3% of community based services reported having at least one child attending whose first language is neither English nor Irish).

In terms of their distribution across community and private services, 60% (of those whose first language is neither English nor Irish) are attending private services and 40% are attending community services. This reflects very closely the overall spread of all children attending (see Section 3.3, above, where it was found that 58.2% of all children attending were in private services and 41.8% in community services). This is a positive finding in terms of integration of children from different backgrounds across all services in the early years sector. Of the 10,678 children attending were English or Irish is not their first language, 3,764 attend rural based services while 6,914 attend urban based services.

Table 3.6.4 Numbers of Children Attending Childcare Services whose First Language is neither English nor Irish – by Community/Private

	Community	Private	Rural	Urban	Total
No. of Child(ren) Attending where First Language is neither English nor Irish	4,289	6,389	3,764	6,914	10,678
No. of Services with any Child(ren) Attending	594	1,212	854	952	1,806
% of Services with any Child(ren) Attending	58.3%	57.2%	47.4%	71.4%	57.6%

4. Child Protection

Key Figures

- 62% (1,945) of all services have a designated staff member responsible for child protection
- 62% (1,956) of all services have a child protection policy in place
- A total of 4,768 staff received child protection training in the past 2 years
- The majority of training received from services in the past two years was provided by the HSE (to 730 services) and City/County Childcare Committees (to 616 services)

The area of child protection is of critical importance in the early years sector.

Children First 2011 (DCYA, 2011) sets out Government policy in relation to child protection. It states that every organisation, both public and private, that is providing services for children or that is in regular direct contact with children should (along with ensuring best practice in recruitment of staff/volunteers):

- identify a designated person to act as a liaison with outside agencies and a resource person to any staff member or volunteer who has child protection concerns
- develop guidance and procedures for staff and/or volunteers who may have reasonable grounds for concern about the safety and welfare of children involved with the organisation
- ensure that staff members or volunteers are aware of how to recognise signs of child abuse or neglect

Child protection was identified by the Department of Children and Youth Affairs as a key priority area of work for the City/County Childcare Committees and Voluntary Childcare Organisations for 2013. This was the first year in which a series of questions on child protection were added to the annual questionnaire. The questions examined the issues of appointment of a designated staff member with responsibility for child protection, the development of child protection policies, and the numbers of staff having had training in this area within the preceding two years (see Table 4a, below). This data will prove very valuable in establishing the extent to which early years services are engaging with this topic and in pointing to gaps where further information and training may be required to ensure that all services meet the highest standards in child protection.

4.1 Designated Staff Member

A total of 1,945 services (62%) reported that they have a designated staff member with responsibility for the area of child protection. Although this proportion is slightly higher among community based services (63.5%) than private providers (61.2%), the difference is small. There is a more substantial difference between urban and rural services, with 56.7% of the former and 65.9% of the latter stating that they have a designated staff member. A county breakdown of the figures is shown in Table 4.2, below. Leitrim and Tipperary South reported the highest proportion of services with a designated child protection staff member, with 80% and 77%, respectively. The counties with the lowest percentages are Dublin South and Sligo.

4.2 Child Protection Policy

Respondents were then asked if there services had a child protection policy in place; 62.3% (1,956) reported having such a policy. Again, the proportion of community based services answering "yes" (64.1%) was slightly higher than among private services (61.5%). Again, a higher proportion of respondents from rural based services have a child protection policy in place than is the case for urban services (66.4% compared to 56.9%). Leitrim has the highest proportion of services with a child protection policy in place (80.8%). Dublin City and Dun Laoghaire Rathdown have the lowest proportions, with 49% each.

4.3 Child Protection Training

Children First (DCYA, 2011) states that all relevant staff (within organisations that provide services for or have direct contact with children) should be trained in both the recognition of signs of abuse and in the immediate steps that should be taken when such signs are noticed. Basic training, it states, "should aim to equip personnel with knowledge of the relevant child care legislation, national and local agency policies, procedures and protocols…and skills in the use of these" (p.62).

Respondents were asked how many staff (if any) of their staff had received child protection training within the preceding two years. A total of 4,768 staff had received training within that time, representing over one-third (37%) of all staff. This clearly represents a challenge for the sector in working towards greater coverage of such critical training for those working in the early years sector. A slightly higher proportion of staff in community based services (39.7%; 2,235) had received training than in private services (34.9%; 2,533). A similar, indeed greater, gap was evident between rural services (in which 40.2% of staff had received training within 2 years) and urban services (where 33.5% had done so). Such a pattern is of interest given that it might be expected that training would be more accessible to urban services.

An examination of the county breakdown of these figures shows considerable unevenness across the country (see Table 4b, below). Limerick City has by far the highest proportion of staff having had training in the preceding two years; four out of five staff had done so (80.4%). The next highest were Westmeath (61.9%) and Leitrim (58.1%). At the lowest end were South Dublin and Dun Laoghaire Rathdown, where only one in five staff had received child protection training in that time (19.6% and 20.4%, respectively). Although some of this could be attributed to these counties having relatively high numbers of staff and the consequent greater challenges of meeting the greater training needs, other counties such as Dublin City and Cork County where there are also very high numbers of staff have fared better (31% and 36.3%, respectively).

Respondents were then asked to indicate who had provided the child protection training attended by their staff. A list of agencies was provided, from which respondents could choose multiple options, as appropriate. The two most commonly identified sources of training were the HSE (730 services said they had received training from the HSE) and the City/County Childcare Committees (CCCs) (616 services).

Table 4a Child Protection (Designated Staff, Written Policy and Staff Training)

	N =	All	Community	Private	Urban	Rural
% of Services with a Designated Person who Deals with Child Protection	1,945	62.0%	63.5%	61.2%	56.7%	65.9%
% of Services with a Child Protection Policy in Place	1,956	62.3%	64.1%	61.5%	56.9%	66.4%
Staff Trained in Area of Child Protection in Last Two Years.	4,768	37.0%	39.7%	34.9%	33.5%	40.2%

Table 4b Child Protection (Designated Staff, Written Policy and Staff Training) – by County

	No. of Responses Received	No. with Designated Person	% with Designated Person	No. with Child Protection Policy	% with Child Protection Policy	Overall No. of Staff	No. of Staff with Training in CP in Last Two Years	% of Staff with Training in CP in Last Two Years
Carlow	38	21	55.3%	21	55.3%	189	53	28.0%
Cavan	46	28	60.9%	28	60.9%	224	80	35.7%
Clare	105	72	68.6%	71	67.6%	341	173	50.7%
Cork City	83	49	59.0%	50	60.2%	362	119	32.9%
Cork County	251	167	66.5%	168	66.9%	935	339	36.3%
Donegal	121	86	71.1%	88	72.7%	461	236	51.2%
Dublin - City	208	105	50.5%	102	49.0%	1,142	354	31.0%
Dublin - Dun Laoghaire Rathdown	102	52	51.0%	50	49.0%	471	96	20.4%
Dublin - Fingal	179	101	56.4%	102	57.0%	647	248	38.3%
Dublin - South Dublin	187	93	49.7%	98	52.4%	947	186	19.6%
Galway	196	111	56.6%	112	57.1%	758	283	37.3%
Kerry	104	69	66.3%	71	68.3%	423	176	41.6%
Kildare	150	104	69.3%	106	70.7%	587	199	33.9%
Kilkenny	76	50	65.8%	51	67.1%	301	126	41.9%
Laois	63	38	60.3%	39	61.9%	248	64	25.8%
Leitrim	26	21	80.8%	21	80.8%	117	68	58.1%
Limerick City	39	27	69.2%	25	64.1%	204	164	80.4%
Limerick County	92	58	63.0%	58	63.0%	297	116	39.1%
Longford	33	25	75.8%	25	75.8%	217	100	46.1%
Louth	83	51	61.4%	52	62.7%	342	167	48.8%
Mayo	97	67	69.1%	67	69.1%	311	100	32.2%
Meath	138	87	63.0%	86	62.3%	479	139	29.0%
Monaghan	54	38	70.4%	37	68.5%	241	120	49.8%
Offaly	53	36	67.9%	36	67.9%	186	61	32.8%

Table 4b Child Protection (Designated Staff, Written Policy and Staff Training) – by County (Cont'd)

	No. of Responses Received	No. with Designated Person	% with Designated Person	No. with Child Protection Policy	% with Child Protection Policy	Overall No. of Staff	No. of Staff with Training in CP in Last Two Years	% of Staff with Training in CP in Last Two Years
Roscommon	51	29	56.9%	29	56.9%	215	68	31.6%
Sligo	51	27	52.9%	27	52.9%	276	110	39.9%
Tipperary North	59	32	54.2%	32	54.2%	210	84	40.0%
Tipperary South	57	44	77.2%	44	77.2%	236	127	53.8%
Waterford City	39	26	66.7%	27	69.2%	186	76	40.9%
Waterford County	51	35	68.6%	35	68.6%	157	57	36.3%
Westmeath	66	47	71.2%	47	71.2%	299	185	61.9%
Wexford	113	72	63.7%	72	63.7%	435	166	38.2%
Wicklow	126	77	61.1%	79	62.7%	447	128	28.6%
Totals	3,137	1,945	62.0%	1,956	62.4%	12,891	4,768	37.0%

5. Childcare Fees

Key Figures

- Average weekly fee for a full day place for a child older than one year is €167.27
- Average weekly fee for a full day place for a baby is €174.13
- Average weekly fee for a part-time place is €95.78
- Average weekly fee for a sessional place is €66.18

The high cost of childcare in Ireland (relative to other European countries) is often cited as a significant burden on families and as a barrier to employment for many parents, particularly lone parents, and as a contributor to child poverty levels. Research on childcare provision in Ireland reveals that Irish people are paying almost twice as much as the EU average for childcare, and the cost of childcare in Ireland is among the highest in the EU (Barry, 2011). The average cost of a full-time place in a pre-school childcare facility (crèche) is about 20% of earnings compared to an EU average of 12%. OECD data from 2007 shows, when calculated as a proportion of family income, the cost is just under 30% in Ireland (only the UK is higher at 33%), compared to an average of around 12.5% in the EU and OECD (OECD, 2007)[12]. Although this international comparison is a number of years old at this point, there is no evidence in Ireland of any reduction in the cost (to parents) of childcare; indeed, given the economic crisis and the fall in family incomes across all sectors, it is likely that childcare in 2012/13 accounts for an even greater proportion of family income than was the case in 2007. The introduction of the free preschool year has undoubtedly eased the burden somewhat for families with children in the year before entering primary school but the cost of childcare for both younger children and for older children (after school) remains significant. This high cost of childcare has a particular effect on low-income households and creates a barrier to accessing paid employment, education and training. The National Economic and Social Council stated that

> *"The cost of childcare is a particular issue for disadvantaged families and is acknowledged as remaining as a significant barrier to the uptake of further reduction or work for low income families, particularly single parents. Affordability is also a major issue for higher income levels, particularly for families with more than one child requiring childcare."* (NESC, 2005)

Government funding programmes continue to subvent the cost of childcare for disadvantaged families (through CCS) and to cover the cost of childcare places for parents participating in eligible education and training courses (through the CETS programme). Even in the context of such measures, the cost to families of childcare services remains a live issue. There is anecdotal evidence in recent years of economic recession, that some parents have been unable to afford centre-based childcare and have reverted (in part or in full) to less formal and less expensive forms of childcare, either in the informal childminding sector or with unpaid or paid relatives.

[12] http://www.oecd.org/els/soc/42004407.pdf - pp. 2-4

5.1 Weekly Fees Charged

Respondents were asked to provide details of the fees charged per week, before the application of any discounts or subvention[13]. (See Table 5.1.1, below).

Full-time places for babies[14] are most expensive (on average €174.13 per week), reflecting the labour intensive nature of caring for this age group. The average weekly cost of a full-time place for a child older than 1 year is €167.27. This represents a rise of 1% since 2011 (€165.54) and a continuation of an upward trend that has been in evidence over a number of years. Although some of the increase between 2010 and 2011 may be attributable to the greater proportion of private providers (who tend to charge somewhat higher fees) among respondents in 2011, the figures from 2012 confirm the continuing upward trajectory.

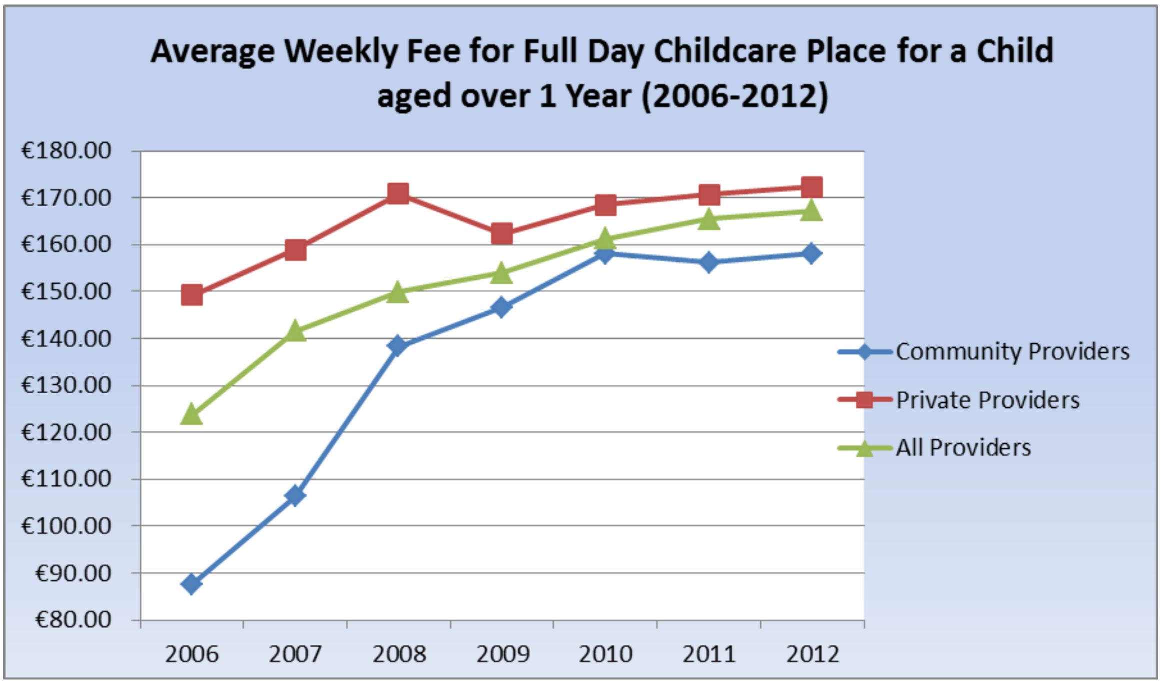
Table 5.1.1: Average Weekly Fee – All Providers

	Community-Based	Private Provider	All	%Increase on 2011
Full-Time Babies	€161.33	€179.94	**€174.13**	0.6%
Full-Time Aged 1+	€158.06	€172.27	**€167.27**	1.0%
Part-time Place	€81.71	€105.49	**€95.78**	13.2%
Sessional Care (1 Session)	€58.66	€69.40	**€66.18**	12.6%
Breakfast Club	€29.95	€32.69	**€31.76**	19.1%
After School	€57.53	€80.31	**€71.47**	13.9%
Drop in / Occasional	€25.27	€23.89	**€24.39**	82.7%

A further examination of the pattern in full day care fees (for children aged over 1 year) between 2006 and 2012 provides some interesting information (see Chart 5.1.2, below, for details). The main patterns it reveals are (a) an overall upward trend in childcare fees and (b) a convergence, over time, in the fees charged by community and private providers. To a certain extent, this pattern is to be expected, as community providers (those participating in Community Childcare Subvention) now operate from a model where the full cost of providing the childcare place is equal to the fee charged. (For some parents, they meet this full cost themselves; for others, some or all of it is subvented through payments made by Pobal, directly to the childcare service). Their "standard" fee is therefore seen to be moving more in line with the amounts charged, up to now, by private providers. The chart also shows that 2009 was marked by a sharp drop in the average fees charged by private providers for full-time places, following a number of years of significant increases towards the end of the "boom years". Following this sharp decline, average fees have begun to climb again and are now (at the end of 2012) back to the same levels as in 2008.

[13] Under the Community Childcare Subvention programme, participating services calculate the full cost of delivering a childcare place. The full cost is charged to parents who are not eligible for subvention. Others are charged reduced amounts, depending on their level of eligibility, with the balance of the cost of the place being subvented by the state.
[14] "Babies" are considered to be children aged under 1 year.

Chart 5.1.2 Average Weekly Fees (2006-2012) - Community, Private and All Facilities



Part-time and sessional places are the most utilised forms of childcare (see Table 3.3.2, above); they account for over half (54.9%) of all places provided as reported in these findings. The average cost of a part-time place increased significantly from €84.64 in 2011 to €95.78 in 2012 (following a slight decrease from €85.42 in 2010 to €84.64 in 2011). The average weekly fee for a sessional place has also increased by 12.6% (from €58.75 in 2011 to €66.18) in 2012 having seen a decrease in previous years (from €62.96 in 2010 to €58.75 in 2011). The reason for this substantial rise in the charges for sessional and part-time places is not immediately obvious.

The average fee for a childcare place is higher in urban facilities than in rural facilities. The average fee for a full day place for a child older than 1 year, for example, is €157.90 in rural services, compared with €177.53 (12.7% higher) in urban services. A comparison between private and community-based facilities shows a significant difference in the average weekly fees charged directly to parents (see Table 5.1.3, below). Private providers' fees are on average 11.5% higher for full-time places for babies, 9.0% higher for full-time places for children over one year, 29.1% higher for part-time places and 39.6% higher for school-age childcare places than those charged by community-based services. In relation to the school age places, the question did not ask if the price included drop-off/collection services so it may be that some of the difference in price is attributable to private providers being more likely to offer such additional services as part of school age care.

Table 5.1.3: Average Weekly Fee – By Provider Type

	Community-Based	Private Provider	Urban	Rural	All
Full-Time Babies	€161.33	€179.94	€185.61	€163.73	**€174.13**
Full-Time Aged 1+	€158.06	€172.27	€177.53	€157.90	**€167.27**
Part-Time Place	€81.71	€105.49	€100.34	€91.32	**€95.78**
Sessional Care (1 Session)	€58.66	€69.40	€69.45	€64.06	**€66.18**
Breakfast Club	€29.95	€32.69	€34.56	€30.54	**€31.76**
After School	€57.53	€80.31	€83.02	€62.47	**€71.47**
Drop in / Occasional	€25.27	€23.89	€24.66	€24.25	**€24.39**

In an effort to examine more closely the rise in average fees between 2011 and 2012, Table 5.1.4, below, sets out community and private services' average fees across the two years. Drop-in/occasional care shows the most significant increases in fees across both community and private services but represents such a small and ad hoc element within their overall provision that it is not of major significance in the overall patterns. What the comparison shows is that, in the case of sessional care and more particularly afterschool and breakfast club care, community services implemented much more significant fee increases between 2011 and 2012 than did private providers. In each of these categories the effect has been to narrow further the gap in average fees that exists between private and community services.

Table 5.1.4 Average Weekly Fee – By Provider Type (Comparison 2011/2012)

	Community Based			Private Providers		
	2011	2012	% Increase	2011	2012	% Increase
Full-Time Babies	€161.34	€161.33	0%	€178.89	€179.94	0.6%
Full-Time Aged 1+	€156.21	€158.06	1.2%	€170.62	€172.27	1.0%
Part-time Place	€72.56	€81.71	12.6%	€93.53	€105.49	12.8%
Sessional Care (1 Session)	€49.65	€58.66	18.1%	€62.53	€69.40	11.0%
Breakfast Club	€21.17	€29.95	41.5%	€29.50	€32.69	10.8%
After School	€49.65	€57.53	15.9%	€71.37	€80.31	2.5%
Drop in / Occasional	€13.23	€25.27	91.0%	€13.42	€23.89	78.0%

6. Childcare Staff

Research (in particular the EPPE study[15]) has consistently shown that key contributors to quality service provision include a highly trained and skilled workforce and a low turnover of staff to ensure continuity of care.

This section provides data on the numbers of staff working in the respondents' childcare facilities. It also includes some figures on staff turnover during the year 2012, and on levels of staff qualifications. The latter is particularly relevant in the context of the Workforce Development Plan for the early years sector, as well as requirements built into the ECCE programme relating to minimum qualification levels of (pre-school) staff in participating services.

The 2012 questionnaire included a new format of questions seeking more detail about the early years staff working in services. For the first time it sought, for each individual staff member (working directly with children), details of (a) employment status (e.g. full/part-time, participant on employment scheme, etc.), (b) highest qualification (if any) attained, (c) length of time working in that service, and (d) age range of the children the staff member works with. This data will provide the most comprehensive information that has ever been captured on the early years workforce in Ireland. The added detail requested of respondents (the question was presented as a matrix with a number of pieces of information to be filled in for each staff member) almost certainly resulted in some choosing not to complete these questions. Of the 3,137 respondents to the overall questionnaire, only 2,616 provided this detailed staff breakdown. Such a risk was considered during the questionnaire design but it was felt that the benefit of the richer information outweighed the risk of some non-responses.

Key Figures

- Total of 12,891 staff working directly with children in 2,616 childcare services
- Average of 4.9 staff working directly with children per facility
- 53.2% are full-time staff and 46.8% are part-time
- Un-paid volunteers make up 1.0% (136) of all staff.
- Over one quarter (17.0%) of all paid staff working in the community sector are participants in employment schemes (CSP, CE, JI)
- 10.8% of staff had been recruited into the services over the preceding year to replace others
- 86.6% of staff working directly with children have a qualification equal to or higher than FETAC Level 5.

[15] Sylva et al, 2010

6.1 Staff Numbers:

A total of 12,891 staff were reported to be working directly with children across 2,616 childcare facilities**. This is an average of 4.9 staff per facility**, a slight decrease on the 2011 figure of 5.5 staff per facility. Table 6.1.1 shows the total and average numbers of staff working in community-based/private and urban/rural facilities. As might be expected, there is a higher average number of childcare workers in community-based facilities and facilities based in urban areas as these tend to have larger numbers of places available and to operate for longer numbers of hours per week (see sections 3.2 and 3.5.1, above).

In comparison with 2011, this year's questionnaire provides information on significantly fewer staff members (12,891 compared with 17,123 last year). This is likely due to three factors: (i) the lower overall response rate to the survey in 2012 (72% instead of 78%); (ii) the above-mentioned level of non-responses to the staff-related questions in the new format; and (c) the apparent fall in the average number of staff working in each facility. (The question format allowed respondents to provide information on a maximum of 17 staff members per service. There is a small possibility that this limit meant that some very large services were unable to complete the table for all of their staff. Only one service contacted Pobal about this issue so it is unlikely that this has affected the overall figures significantly.)

Table 6.1.1: Childcare Staff Numbers – Community, Private, Urban, Rural and all Services

	No. of Facilities	Total No. of Childcare Staff	Average no. of Childcare Staff per Facility
All	2,616	12,891	4.9
Community-Based	863	5,625	6.5
Private Provider	1,753	7,266	4.1
Urban	1,100	6,212	5.6
Rural	1,516	6,679	4.4

The overall pattern of employment is that 49.1% of staff are in full-time[16] paid employment and a further 41.8% are in paid part-time[17] employment (see Table 6.1.2, below). One in twelve (8%) of all staff are made up of those participating in various employment schemes (the largest of which is Community Employment (CE)) and unpaid volunteers make up 1.1%. Of the paid staff (excluding volunteers and staff involved in employment schemes), 54.2% are full-time staff and 46.0% are part-time.

Participants of the Jobs Initiative (JI), Community Employment (CE) or Community Services Programme (CSP) schemes are eligible for work in community-based services only, but are not paid directly by these services. While such staff can be counted towards the ratio of staff-to-children at a facility, they are not paid by the facility itself. Staff participating in these schemes represent less than one fifth (17%) of all paid staff working in the community sector, a noticeable decrease on the figure of 27.2% shown in 2011. Although this demonstrates a continued reliance of the community childcare sector on staff participating in such labour market schemes, it suggests that this dependence is diminishing somewhat. However, it may also be indicating that community based services are failing to fill their CE

[16] Full-time staff are those working for more than 20 hours per week.
[17] Part-time staff work less than or equal to 20 hours per week.

placements (as a result of changes introduced in 2012, making the scheme less attractive to lone parents) and being left with staff shortages that they are not in a position to address.

A county breakdown of this data is available in *Appendix V*.

Table 6.1.2: No. of Staff Employed by Sector

	Community-Based	Private Provider	Rural	Urban	Sector Totals	%
No. of Facilities	*863*	*1,753*	*1,516*	*1,100*	*2,616*	*83.4%*
Paid (Full-Time)	2,383	3,952	3,199	3,136	6,335	49.1%
Paid (Part-Time)	2,213	3,175	2,953	2,435	5,388	41.8%
CE (Scheme)	877	0	371	506	877	6.8%
CSP (Scheme)	48	0	33	15	48	0.4%
JI (Scheme)	30	0	12	18	30	0.2%
JobsBridge Participant	39	38	44	33	77	0.6%
Volunteers	35	101	67	69	136	1.1%
Overall Totals	5,625	7,266	6,679	6,212	12,891	100.0%

6.2 Staff Turnover

Continuity of care and low rates of staff turnover have long been recognised as important indicators of quality in a childcare service (e.g. Vandell et al, 1988). From the perspective of the childcare provider (whether private or community-based), the turnover of staff within the childcare sector can also have a debilitating effect on the operation of the service.

While all employers will incur costs in recruiting new staff, there is an added dimension within the childcare sector that a shortfall of staff will have a direct impact on the number of children that can be catered for, as per HSE regulations. There has already been some evidence of significant rates of turnover in the sector in Ireland, with NCNA (2008), for example, reporting a staff turnover rate of 15% among its member services.

With this in mind, respondents were asked to indicate, for each staff member, how long they had been working in the service. The categories available were (a) up to 1 year, (b) 1-2 years, (c) 3-4 years and (d) over 4 years (see Table 6.2, below). Half (49.7%) of all staff had been working in the same service for longer than 4 years. A further 35% had been working there for between 1 and 4 years. Just over one in seven (14.9%) staff had been working in the same service for less than 1 year. Interestingly, the overall patterns were the same across community/private and urban/rural categories.

Table 6.2 Breakdown of Staff by Length of Service

	Community-Based	Private Provider	Rural	Urban	Totals
Number of Staff	5,584	7,238	6,646	6,176	12,822
Up to 1 Yr	13.7%	15.8%	14.1%	15.7%	14.9%
1-2 yrs	18.8%	18.0%	17.4%	19.4%	18.3%
3-4 yrs	16.6%	17.5%	18.7%	15.4%	17.1%
4 yrs+	51.0%	48.7%	49.8%	49.6%	49.7%

Note – 69 staff did not provide information on length of service

6.3 Staff Qualifications

The survey questionnaire also sought information on the childcare education and training awards of childcare workers. The level of qualification of practitioners in early years settings has long been acknowledged as an important contributor to and indicator of quality service provision (e.g. Sylva et al, 2010). Recent years have seen a particular focus on this issue in Ireland, following the publication of the Workforce Development Plan for the sector and the introduction of the ECCE free preschool year.

The ECCE Programme, in its third full year at the time of this survey, is the first funding programme in Ireland to have placed specific requirements on services as regards staff qualification levels. Specifically, participation in the programme requires that pre-schools offer a service delivered by a 'Pre-school Leader'. This specific staff member must hold a certification for a major award in the childcare/ early education at a minimum of Level 5 on the National Framework of Qualifications in Ireland (NFQ). In order to allow for a period of transition, for the first two years it was permissible for a service to participate where an appropriate level of certification was held (including specific core knowledge areas and at least 2 years working in a position of responsibility with children). From September 2012, pre-school leaders in the programme were required to hold a nationally accredited major award at Level 5 on the National Framework of Qualifications (NFQ) (or equivalent[18]) in childcare/ early childhood care and education. Where it can be shown that a staff member has *substantially* completed a major qualification and where it will be completed no later than mid-2013, DCYA agreed that services could continue to participate in the programme for the 2012/13 year.

Respondents provided information on the level of training/qualifications of 12,838 staff working directly with children. The findings are summarised in Table 6.3.1, below and show that **86.6% of staff have a qualification equal to or higher than FETAC Level 5**[19], an increase on the 2011 figure of 75.9%. (A further 1.1% have qualifications either attained or accredited abroad; as it is unclear to which FETAC/HETAC level these qualifications equate, they have been counted separately, below.) This represents substantial progress across the sector in recent years. Of the

[18]A nationally accredited major award at Level 5 is currently accredited by the Further Education and Training Awards Council (FETAC) but will in future be accredited by the new Qualifications and Quality Assurance Authority. A major award at Level 5 has 8 component (minor) awards. Qualifications that are equivalent to a nationally accredited major award at Level 5 are of two kinds: (a) legacy awards made by Irish awarding bodies prior to the establishment of the National Framework of Qualifications (NFQ); these are awards made by NCVA (National Council for Vocational Awards) or FAS (where level 2 equates to the NVQ's level 5), and (b) awards made by international awarding bodies.

[19] Childcare staff reported to hold "Other Related Childcare Awards" are not included in this figure, as the accreditation level (if any) of these awards cannot be ascertained.

total number of staff, 7.4% were categorised as having completed no childcare training; 2.8% were categorised as having completed unaccredited training.

When a comparison is made between community and private services, it can be seen that 9.2% of staff in community services have no childcare qualification (with a further 3.8% having completed either non-accredited courses or courses accredited outside of Ireland). Private providers reported 6.0% of staff as having no childcare qualifications (with a further 4.1% having completed either non-accredited courses or courses accredited outside of Ireland). In community facilities, 84.7% of staff are now qualified to FETAC level 5 or above; in private facilities, this is slightly higher at 88%. Looking at qualifications at Level 6 or above (and including those with a primary teaching qualification within this category), community facilities have 41.7% of staff having attained this level of qualification, compared with 51.7% in private services.

Interestingly, a comparison of urban and rural services shows staff in rural services to have slightly higher levels of qualifications overall. In terms of staff with no childcare qualifications, 8% of staff in urban services fall into this category, compared with 6.8% in rural services. In urban services, 85.1% of staff have attained FETAC Level 5 or higher; the corresponding percentage in rural services is 87.9%. Those having achieved Level 6 and above are at 45.4% of staff in urban services and 48.9% of staff in rural services. As detailed above, there is no significant difference between urban and rural services in terms of the length of time staff have been working in their facilities so length of service cannot be said to explain the slightly higher levels of qualifications in rural services.

The details of staff numbers in each category in private, community, urban and rural services are available in Appendix III.

Table 6.3.1 *Childcare Education and Training Awards*

	Private Provider	Community-Based	Urban	Rural	All
Total by Provider Types	N = 7,245	N = 5,593	N = 6,184	N = 6,654	N = 12,838
No Childcare Qualification	436 – 6.0%	512 – 9.2%	494 – 8.0%	454 – 6.8%	948 – 7.4%
FETAC Level 5 or above	6,369 – 87.9%	4,739 – 84.7%	5,262 – 85.0%	5846 – 87.8%	11,108 - 86.5%
FETAC Level 6 or above	3,720 – 51.3%	2,336 – 41.8%	2,804 – 45.3%	3,252 – 48.9%	6056 – 47.2%
FETAC (NCVA) Level 4 Award	1.9%	2.5%	2.7%	1.7%	2.1%
FETAC (NCVA) Level 5 Award	36.6%	43.0%	39.7%	39.0%	39.4%
FETAC (NCVA) Level 6 Award	36.9%	32.1%	30.9%	38.4%	34.8%
NVQ Level 7 Award (Ord. Degree)	5.9%	3.5%	5.7%	4.1%	4.9%
NVQ Level 8 Award (Hons Degree)	7.1%	5.3%	7.3%	5.5%	6.3%
NVQ Level 9/10 Award (Mas/PHD)	0.8%	0.5%	1.0%	0.4%	0.7%
Primary Teaching Qualification	0.7%	0.3%	0.5%	0.5%	0.5%
Accredited Course (Outside ROI)	1.3%	0.9%	1.2%	1.1%	1.1%
Non Accredited Childcare Courses	2.8%	2.7%	3.0%	2.5%	2.8%

Of all of 3,001 respondents who reported that their services are participating in the ECCE programme, 2,518 provided information on the qualification levels of their staff (see Table 6.3.2, below). It should be noted that the question asked about qualifications of *all* staff working with children in each facility and did not distinguish those working in the pre-school/ECCE element of the service from others as regards qualifications. 96.5% of these services have at least one staff member qualified to FETAC Level 4 or higher and 95.9% have at least one staff member qualified to FETAC Level 5 or higher. Just short of three quarters (73.9%) have at least one staff member qualified to FETAC Level 6 or higher and just over one-fifth (20.2%) have at least one staff member qualified to HETAC Level 7 or higher. Interestingly, this year we asked services if they had any staff qualified to NVQ Level 8 and 9/10 with 11.5% and 1.7% respectively, stating they had. Just under one percent (0.7%) of services stated that they had at least one staff member with a primary teaching qualification with 18 services stating so.

There are 88 services participating in ECCE that, at the end of 2012, did not have any staff member qualified to FETAC Level 5 or above. Of these, 69 are private childcare providers and 19 are community-based services. The figure reported in 2011 was 118 (with no staff qualified to FETAC Level 5 or higher with 89 from private services and 29 from community). It should be noted, however, that because the overall response rate to the questionnaire is slightly lower in 2012, it is more accurate to compare the percentages for the two years. What this shows is that the proportion of ECCE services without any staff member having *completed* FETAC Level 5 training has fallen from 4% to 3.5%.

Table 6.3.2 Qualification Levels of Staff Working in ECCE Services

	2011		2012	
ECCE Services that have:	N = 2,921	%	N = 2,518	%
At Least one Staff Member Qualified to FETAC Level 5 or above	2,802	96.0%	2,414	95.9%
At Least one Staff Member Qualified to FETAC Level 6 or above	2,196	75.2%	1,860	73.9%
At Least one Staff Member Qualified to NVQ Level 7 or above	996	34.1%	509	20.2%
At Least one Staff Member Qualified to NVQ Level 8 or above	650	22.3%	290	11.5%
At Least one Staff Member Qualified to NVQ Level 9/10 or above	94	3.2%	43	1.7%
FETAC Level 5 as the Highest Level of Qualification in the Service	606	20.7%	554	22.0%
No. of Staff Qualified to FETAC Level 5 or higher	118	4.0%	88	3.5%

This aligns with the patterns found on Pobal compliance visits to ECCE services, where 98% of ECCE services, visited between January and March 2013, were found to be compliant with the programme conditions in relation to the Level 5 qualification (slightly up on the 96% compliance rate during the same period in early 2012). It is clear that the vast majority of services have reached the levels required under ECCE, but that for some, it remains a challenge to do so. DCYA have acknowledged this issue, in the flexibility that has been allowed to services over the first few years of the programme.

As mentioned above, the 2012 questionnaire asked some more detailed questions in relation to early years staff, including the age range of the children with whom they work. This was based on some anecdotal evidence and concerns that the requirements built into the ECCE programme in terms of staff qualifications *could* have resulted in services placing the more qualified among their staff teams working with the pre-school cohort and therefore having less qualified staff working with the younger age groups. Obviously, such a situation would be of concern in terms of the quality of care being provided to babies and very young children. Respondents were asked to categorise each staff member as working with (a) 0-18 month old children, (b) over 18 month old children, or (c) both age ranges. Table 6.3.3, below, shows the findings.

Across all staff about which information was received, 7.2% were found to have no childcare qualifications (rising to 10% if those with non-accredited training are added in). When looking at staff who work only with the age range of 0-18 months, however, 9.3% are found to have no qualifications (rising to 12.4% with the inclusion of those with non-accredited training). This means that one in eight of staff working with babies and very young children has no qualifications, compared with one in ten across all staff. Staff working exclusively with children older than 18 months old are slightly more likely, than others, to have accredited qualifications (9.6% do not). When comparing staff who work exclusively with babies and younger children with those who work exclusively with those over 18 months old, two interesting patterns emerge. The latter are slightly more likely to have *any* qualification at Level 5 or above (87.1% compared with 84.1%) but are *significantly* more likely to have gone beyond Level 5. Half of those working exclusively with those over 18 months old have completed Level 6 or above, compared with one-third of those who work exclusively with those under 18 months old.

These findings suggest that there is some evidence of a concentration of the higher qualified staff in services, or in parts of services, where they are working with children over 18 months old. It is not possible to ascertain for certain whether or not this is a result of the requirements associated with the ECCE programme as equivalent data from the period before its introduction is not available. The findings do, however, raise some concerns about the priority afforded to the quality of care for the very youngest children attending early years services.

Table 6.3.3: Childcare Education and Training Awards by Age Category

	0-18 Months	18 Months +	Both Age Ranges	Totals by Range
Total by Provider Types	N = 1,097	N = 7,900	N = 3,523	N = 12,520
No Childcare Qualification	9.3%	6.6%	7.8%	7.2%
FETAC 5 or above	84.1%	87.1%	86.8%	86.8%
FETAC 6 or above	34.6%	50.1%	44.8%	47.3%
FETAC (NCVA) Level 4 Award	2.6%	2.1%	2.1%	2.1%
FETAC (NCVA) Level 5 Award	49.5%	37.0%	42.0%	39.5%
FETAC (NCVA) Level 6 Award	27.1%	36.2%	34.4%	34.9%
NVQ Level 7 Award (Ord. Degree)	3.1%	5.4%	4.2%	4.9%
NVQ Level 8 Award (Hons Degree)	4.1%	7.1%	5.2%	6.3%
NVQ Level 9/10 Award (Mas/PHD)	0.3%	0.7%	0.6%	0.6%
Primary Teaching Qualification	0.1%	0.7%	0.3%	0.5%
Accredited Course (Outside ROI)	0.9%	1.2%	1.2%	1.2%
Non Accredited Childcare Courses	3.1%	3.0%	2.1%	2.8%

***Information on the age range worked with was not available for 318 staff.**

7. Childcare Services' Interactions with Other Agencies and Initiatives

This section of the report covers a range of issues related to the interaction of childcare services with other agencies. This includes their membership of networks and voluntary childcare organisations, their interactions with Pobal (specifically in relation to compliance visits and completion of online financial returns) and their contacts with local City/County Childcare Committees. The final part of this section examines services' experiences to date in relation to Síolta (the National Quality Framework for Early Childhood Education) and Aistear (the Early Childhood Curriculum Framework).

7.1 Membership of Networks/Organisations

Key Figures

- 98% of services have reported to have had contact with their local CCC
- 2,654 are members of at least one network/organisation
- 63% are members of Early Childhood Ireland
- 57% are members of City/County Childcare Committee networks

Respondents were asked to indicate any networks/organisations of which they are members. 2,654 services responded to this question. Of this number, 91% reported being a member of at least one network/organisation. Up slightly from 90% in 2011, this is further indication of the very high levels of involvement and engagement among early years services. The nature of this engagement, of course, varies considerably; some services are "active" members of networks/organisations and attend training/ workshops and avail of other supports on offer, while others may be members only to the extent of receiving mailshots/newsletters. The questionnaire did not probe the extent of services' involvement or the level of supports received as a result.

Table 7.1 below, shows the numbers of services that reported being a member of the various types of network/organisation. The largest membership is of Early Childhood Ireland (ECI). Almost two-thirds (63%) of respondents reported being members of ECI (64% of community services and 62% of private providers). The second largest category is the "CCC network", in other words services being members of networks facilitated/supported by their local City/County Childcare Committees; 56% of respondents are members of such a network. A slightly higher proportion of community based services (62%) reporting being members of CCC networks than is the case for private providers (54%). Other organisations and networks are much smaller in their reach, in some cases because they target and support only a particular grouping of services (e.g. Naíonraí). The largest of these is St. Nicholas Montessori Society of Ireland; almost 9.5% of respondents said that they are members of this organisation (although this is weighted very heavily towards private services (of which 13.8% are members) compared with community services (0.9%).

Table 7.1 Membership of Childcare Organisations and Networks – All Providers and Community/ Private Providers

	Community		Private		All	
No. of Services Responding to Question	874		1,780		2,654	
	No =	%	No.	%	No =	%
CCC Network	539	61.7%	964	54.2%	1,503	56.6%
Early Childhood Ireland	562	64.3%	1,113	62.5%	1,675	63.1%
St. Nicholas Montessori Society of Ireland	8	0.9%	245	13.8%	253	9.5%
Forbairt Naíonraí Teoranta	54	6.2%	65	3.7%	119	4.5%
Childminding Ireland	15	1.7%	51	2.9%	66	2.5%
High/Scope Ireland	87	10.0%	50	2.8%	137	5.2%
Steiner Kindergarten	11	1.3%	6	0.3%	17	0.6%
Border Counties Childcare	64	7.3%	86	4.8%	150	5.7%
Comhar Naíonraí na Gaeltachta	66	7.6%	9	0.5%	75	2.8%
None of the above	57	6.5%	182	10.2%	239	9.0%

7.2 City and County Childcare Committees

Key Figures
• 98% of services have had some contact with their local CCC • Of the 2,329 services that reported having received printed information from their CCC, 91.8% rated that information as good, very good or excellent

The 33 City and County Childcare Committees are the local implementing agencies for the DCYA's funding programmes. In the course of their work, CCC staff are involved in providing a range of supports, advice, information and training to childcare services in their local areas. The questionnaire asked services to indicate, in the first instance, whether they had had any contact with their local CCC, and then (if so) to rate that interaction on a 5-point scale (poor / fair / good / very good / excellent).

2,654 respondents answered this series of questions. Of that number, **98% (2,596) reported that they had had some contact with their local CCC**; 58 (2.0%) had not. The percentage was slightly higher among private services (99%; 1,757) than community services (96%; 839).

Given the large numbers of respondents, this survey represents by far the largest body of feedback gathered to date from childcare services on the support work provided on the ground by the 33 CCCs. The fact that the questionnaire is submitted anonymously is also notable as this should lend itself to an honest appraisal of the CCCs from the user perspective. Table 7.2.1, below, provides the national summary and, in line with previous years, represents a very positive statement from childcare services about the supports provided to them by their local CCCs.

If a rating of "good", "very good" or "excellent" is taken to be a "positive" rating, every category of support/interaction was rated positively by over 78% of services. The importance and quality of the CCC as a local conduit for information is very clear; the categories of support rated highest were "printed information" and "help preparing service returns". Although not specified in the question, it is likely that the information provided focussed largely on issues such as the conditions and requirements of DCYA funding programmes, the quality and curriculum frameworks (Síolta and Aistear), and so on. Also rated very highly (as it has consistently been over a number of years) is the training that is provided by (or with the support of) the CCCs; 90.6% of respondents gave a positive rating to CCC training. Participation in DCYA funding programmes in recent years has required services to make an online service return to DCYA each autumn. CCCs have played a very active role in supporting services to complete this task, ranging from printed information and guidance on the subject to provision of workshops and physical/IT facilities for services to actually complete their returns. The value placed by services on this support is clear; 48.1% (of over 2,100) rated this support as "excellent" and a further 27.4% rated it as "very good".

Table 7.2.1 Ratings of Supports from CCCs – All Providers

	N =	Poor	Fair	Good	Very Good	Excellent	Positive Rating*
Training	2,329	2.4%	7.0%	18.0%	31.6%	41.0%	90.6%
Information Meetings	2,308	2.5%	6.6%	18.4%	31.1%	41.4%	90.9%
Help Preparing Annual Service Return to DCYA (ECCE,/CETS/CCS)	2,040	2.6%	6.2%	15.7%	27.4%	48.1%	91.2%
Support with Sustainability/Financial Planning	1,494	8.4%	12.7%	20.2%	26.5%	32.2%	78.9%
Support with Developing your Fee Payment Policy	2,161	2.9%	6.1%	16.6%	27.5%	46.9%	91.0%
Printed Information	2,329	2.5%	5.7%	20.0%	30.4%	41.4%	91.8%
Support with Reporting Requirements (to Pobal)	2,066	2.9%	6.8%	16.3%	29.2%	44.8%	90.3%
A Site Visit	1,780	8.6%	9.2%	17.6%	27.8%	36.8%	82.2%

The tables, below, show the ratings given by community and private providers of the supports they have received from their local CCCs (Table 7.2.2 and 7.2.3, respectively). Although the differences are not significant in all cases, it is notable that across all types of support, community providers are somewhat more likely to give a positive rating of the support than are private providers. The biggest difference is to be seen in relation to "support with sustainability/

financial planning". Of all the areas of support, this one was actually rated by the smallest number of private providers (888 compared with figures of up to 1,575 in other areas such as training and printed information.) The slightly lower ratings given by those who had received such supports is perhaps to be expected given that many CCCs have tended to focus their supports in this area towards the community sector; it may be that some of the materials are, therefore, perceived as being not as relevant to private providers. Nonetheless, positive ratings of over 70% are by no means weak and it is clear that CCCs are providing valued supports across the whole sector on these topics.

Table 7.2.2 Ratings of supports from CCCs - Community Childcare Providers

	N =	Poor	Fair	Good	Very Good	Excellent	Positive Rating*
Training	754	1.5%	5.0%	19.6%	35.1%	38.7%	93.4%
Information Meetings	751	1.7%	4.7%	19.2%	34.6%	39.8%	93.6%
Help Preparing Annual Service Return to DCYA (ECCE,/CETS/CCS)	672	2.4%	6.7%	17.0%	29.8%	44.2%	91.0%
Support with Sustainability/Financial Planning	606	3.0%	10.7%	17.8%	32.8%	35.6%	86.2%
Support with Developing your Fee Payment Policy	736	1.8%	4.8%	16.4%	28.0%	49.0%	93.4%
Printed Information	771	1.8%	4.0%	19.3%	34.1%	40.7%	94.1%
Support with Reporting Requirements (to Pobal)	696	2.3%	5.5%	17.2%	30.9%	44.1%	92.2%
A Site Visit	632	6.2%	9.0%	17.6%	30.5%	36.7%	84.8%

Table 7.2.3 Ratings of supports from CCCs - Private Childcare Providers

	N =	Poor	Fair	Good	Very Good	Excellent	Positive Rating*
Training	1,575	2.9%	8.0%	17.0%	30.0%	42.1%	89.1%
Information Meetings	1,560	2.8%	7.6%	18.0%	29.3%	42.3%	89.6%
Help Preparing Annual Service Return to DCYA (ECCE,/CETS/CCS)	1,368	2.7%	5.9%	15.1%	26.2%	50.1%	91.4%
Support with Sustainability/Financial Planning	888	12.2%	14.1%	21.7%	22.2%	29.8%	73. 7%
Support with Developing your Fee Payment Policy	1,425	3.5%	6.7%	16.7%	27.2%	45.8%	89.7%
Printed Information	1,558	2.9%	6.5%	20.2%	28.6%	41.8%	90.6%
Support with Reporting Requirements (to Pobal)	1,370	3.1%	7.6%	15.8%	28.3%	45.2%	89.3%
A Site Visit	1,148	10.0%	9.2%	17.6%	26.3%	36.8%	80.7%

7.3 HSE Preschool Inspection Visits

Respondents were asked if their service received an inspection visit from the HSE Preschool Inspectorate during 2012 (see Table 7.3, below). A total of 67.2% services reported to having received an inspection visit during 2012, while just over 29% of services said they had not. Just 3.0% of services said a visit was not applicable as they are notified to the HSE.

Table 7.3 No. of Services who received a HSE Inspection Visit During 2012

	N =	%All	%CB	%PP
Yes	1,783	67.2%	68.3%	66.6%
No	792	29.8%	27.9%	30.8%
Not Applicable - Not Notified to the HSE	79	3.0%	3.8%	2.6%
Total	2,654	100%	100%	100%

7.4 Pobal

Pobal has taken the opportunity each year to use the annual questionnaire to gather feedback on our own interactions with childcare services. Although Pobal engages in a range of interactions with different services, including contracting and payments processes, audit and verification visits, advisory visits (for services experiencing financial/governance challenges), and so on, the questionnaire has focussed on three particular areas on this occasion: compliance visits, the online (CCS) reporting system, and the Childcare Capital 2012 programme.

7.4.1 Pobal Compliance Visits

Key Figures
• 96% of services have had at least one compliance visit from Pobal • Of the 2,540 services that reported to having had a compliance visit, 97.3% of them rated the conduct of the visit as good, very good or excellent.

Since 2009, Pobal has been undertaking on-site compliance visits with services participating in DCYA funding programmes (ECCE, CETS and CCS). During the course of a single visit, Pobal examines compliance with all programmes in which the service participates. Of 2,645 respondents to this set of questions, **96.0% reported having previously had at least one Compliance Visit** carried out by Pobal. (Among community provider respondents, 97.7% had had a compliance visit; the percentage among private providers was 95.2%.) This represents a significant increase on the percentage in 2010 (75.3%) and 2011 (89.4%) and is to be expected as the roll-out and coverage of visits increases over time.

Table 7.4.1a, below, shows the responses to some questions seeking feedback on the standard of the visit carried out. In line with the findings in 2011, the 2012 responses reflect an extremely high level of satisfaction with the visits, with the vast majority of the feedback being of a highly positive nature. Regarding the conduct of the on-site visit itself, of the 2,540 respondents, 78% rated it as “very good” or “excellent”; 94.8% gave a positive rating (“good” or “very good” or excellent”).

In 2011, the area of “post-visit follow-up” was identified as the area where there was most room for improvement (although the “positive responses” were still at 82.4% at that time). In 2012 there has been a significant improvement, with 87.8% now giving a positive rating to this aspect of their compliance visit. The percentage who rated the post/follow-up visit as ‘poor’ has fallen by almost half, decreasing from 9% to 4.7% in 2012. Since the end of 2011, Pobal has been issuing post-visit outcomes to services on a quarterly basis (following the issue of that quarter’s report to DCYA); while there will always be an element of time-lag between the visit and the notification of the outcome, that time is now significantly shorter and has likely contributed to the improved ratings of this element of compliance visits in the 2012 questionnaire.

Table 7.4.1a: Rating of Compliance Visit – all Providers (N = 2,540)

Aspects of the Visit you Received-	Poor	Fair	Good	Very Good	Excellent	Positive Rating
Correspondence/Info in Advance of Visit	3.5%	4.0%	18.0%	37.3%	37.2%	92.5%
Conduct of Visit Itself	1.2%	4.0%	17.1%	35.6%	42.1%	94.8%
Info/Follow-up after Visit Took Place	4.7%	7.5%	22.3%	33.7%	31.8%	87.8%

Tables 7.4.1b and 7.4.1c, below, show the ratings of Pobal compliance visits provided by community and private provider respondents, respectively. Although the general picture is of very positive feedback across both categories, community providers, on all three aspects of the visits, provide somewhat higher ratings than private providers. The difference is most noticeable in relation to the "information / follow-up provided after the visit took place", which is rated positively by 92.3% of community providers and by 85.5% of private providers. As noted above, the latter finding may well be related to the delays in issuing visit outcomes during 2011. It is possible that the delays were more concerning for private providers who had not previously had any relationship with Pobal, were having their first on-site visit and were anxious to have a quick notification of its outcome. As anticipated, the feedback on this element of compliance visits has been more positive in 2012, increasing from 78.7% in 2011 to 85.5% in 2012, now that outcomes are issued more quickly following conduct of the visits.

Table 7.4.1b: Rating of Compliance Visit - Community Providers (N =851)

Aspects of the Visit you Received-	Poor	Fair	Good	Very Good	Excellent	Positive Rating
Correspondence/Info in Advance of Visit	1.3%	303%	18.1%	43.4%	33.9%	95.4%
Conduct of Visit Itself	0.2%	2.5%	14.2%	40.7%	42.4%	97.3%
Info/Follow-up After Visit Took Place	3.0%	4.7%	19.3%	41.2%	31.8%	92.3%

Table 7.4.1c: Rating of Compliance Visit - Private Providers (N = 1,689)

Aspects of the Visit you Received-	Poor	Fair	Good	Very Good	Excellent	Positive Rating
Correspondence/Info in Advance of Visit	4.6%	4.3%	18.0%	34.2%	38.9%	91.1%
Conduct of Visit Itself	1.7%	4.8%	18.5%	33.0%	41.9%	93.4%
Info/Follow-up After Visit Took Place	5.6%	8.9%	23.8%	30.0%	31.7%	85.5%

7.4.2 Pobal Online Community Childcare Subvention (CCS) Scheme Reporting System

Key Figures

- Of Pobal Online (CCS Reporting) users, 91.4% rated the system's accessibility as good, very good or excellent.
- 87.9% rated Pobal's response to queries as good, very good or excellent.

Community-based services participating in CCS report to Pobal three times a year, using an online system. These returns consist of income and expenditure information for the preceding period and financial projections for the year to follow, along with service details (places available, operating hours, etc). Table 7.4.2, below, reveals the response rating for four aspects of Pobal's CCS online reporting system.

A "positive rating" (either "good", "very good" or "excellent") was given by at least 81.5% of respondents on all four aspects of the reporting system. It is encouraging to note that there has been an increase from 76% in 2010, to 82.7% in 2011 and 85% in 2012 giving a positive rating to the ease of completion of the online return. This is likely in part due to increased familiarity with the format of the return and use of the system and also to Pobal's user guidelines (written and audio-visual) that are amended on an ongoing basis as a result of user feedback. As was the case in 2011, it is encouraging that over four-fifths of respondents gave a positive rating to the usefulness of the returns as a tool for the service itself to project its finances. The percentage of positive responses in relation to Pobal's response to queries (87.9%) remains very high, and represents a very slight increase since 2011 (86.4%).

Table 7.4.2: Ratings of Pobal Online Reporting System (Community Providers only) (N = 607)

CCS Online Reporting System-	Poor	Fair	Good	Very Good	Excellent	Positive Rating
Accessibility (Login, Accessing Return, etc.)	1.4%	7.2%	32.0%	37.2%	22.2%	91.4%
Ease of Completion of the Return	3.3%	11.7%	32.3%	34.4%	18.3%	85.0%
Usefulness (as a Tool to Project Finances)	3.5%	15.0%	30.4%	35.3%	15.8%	81.5%
Pobal Response to any Queries you Raised	2.1%	10.0%	27.6%	35.9%	24.4%	87.9%

7.4.3 Childcare Capital 2012

Key Figures

- Of 2,645 respondents, 52.5% had applied for Childcare Capital 2012 funding
- 78.8% of these applicants had been declined capital funding
- 71.6% of respondents gave a positive rating to Pobal email/website updates on programme status.

The Childcare Capital 2012 funding programme, through which €6m was made available[20], was launched in March 2012 and received a huge response. A total of 2,343 applications were received of which 1,592 were private providers, 738 were community based services and 13 were classified as 'childminders'. The outcome of these applications can be seen in the following table:

Table 7.4.3a Childcare Capital 2012, Applications and Outcome by Provider Type

	N =	Community	Private	Childminders
Applications Received	2,343	738	1,592	13
Declined	2,048	571	1,467	10
Approved (Full Amount Requested)	100	62	37	1
Approved (Partial Amount Requested)	195	105	2	2

Slightly over half of those responding to this section of the questionnaire (1,390: 52.5%) indicated that they had made an application for funding under the programme. Respondents who had applied for funding were then asked if their applications had been approved, part-approved or declined. 1,363 respondents out of 1,390 who answered 'yes' to applying to the Childcare Capital 2012 programme answered this question, was their application declined, approved in full or partially approved and Table 7.4.3b below shows the results:

Table 7.4.3b Childcare Capital 2012 Respondents by Application Outcome

	N =	% of Total who Applied
Declined	1,096	80.4%
Approved (Full Amount Requested)	140	10.3%
Approved (Partial Amount Requested)	127	9.3%

It must be borne in mind that the following findings are only based on those whose applications for funding were declined. In terms of "clarity of guidelines on programme criteria", more than half of declined applicants gave a positive rating (see Table 7.4.3c, below). More than one in five (22%), however, rated this as "poor". When asked to rate the online application process on its ease of completion, respondents were equally divided between those who gave a positive rating and those that rated it as "poor" or "fair". The two areas rated most highly were the response given by Pobal staff to any queries raised (69.9% gave this a positive rating) and Pobal email/website updates on

[20] The Childcare Capital Funding 2012 was available to both community and private childcare providers, currently participating in one or more of the Department of Children and Youth Affairs (DCYA) funding programmes: 1) Community Childcare Subvention (CCS) programme; 2) Childcare Education and Training Support (CETS) programme and 3) Free Pre-School Year in Early Childhood Care and Education (ECCE) programme. The funding was available for remedial / maintenance/renovation work and /or equipment. The maximum grant available was €50,000 (inclusive of VAT). A priority for this fund was to keep open early education and childcare services that were in danger of closure, due to the physical condition of the building and / or adequacy of services / facilities. Any remaining funding was applied to improving the quality of the service available to children.

programme status (rated positively by 71.6%). It is of concern that 30% rated Pobal's response to their queries as either "fair" or "poor" but it is not possible to establish if these queries were of a technical nature or more fundamental queries about the nature/focus of the funding programme or about requests to reconsider the outcome of individual applications. The clarity of information provided on the outcome of the application process was again rated positively by exactly half of the respondents, with the other half rating it as "fair" or "poor". It is possible that some of the latter ratings are a result of the *content* of the communication (i.e. the decision not to fund) and the fact that detailed feedback was not given on each individual application, rather than on the nature/format of that communication. Unsuccessful applicants were simply informed that their applications had not scored sufficiently highly against the published programme criteria.

Table 7.4.3c Ratings of Childcare Capital 2012 Programme – Unsuccessful Applicants

Childcare Capital 2012	N =	Poor	Fair	Good	Very Good	Excellent	Positive Rating
Clarity of Guidelines on Programme criteria	1,080	22.0%	22.4%	37.7%	13.4%	4.5%	55.6%
Online Application Process – Ease of Completion	1,075	22.3%	27.6%	32.6%	13.1%	4.4%	50.1%
Pobal Staff Response to any Queries Raised	953	12.2%	18.2%	41.8%	19.8%	8.0%	69.9%
Pobal Email/Website Updates on Programme Status	1,044	9.7%	18.7%	42.8%	21.3%	7.5%	71.6%
Clarity of Information Provided on Application Outcome	1, 058	25.0%	25.0%	30.2%	13.9%	5.9%	50.0%

It is interesting to compare the above findings from unsuccessful applicants with those previously gathered by Pobal from those who had been successful in securing funding, under the same programme. It should be noted that the information gathered from successful applicants was captured a number of months earlier and was not captured using an anonymous questionnaire. Either factor (or both) could be considered to have influenced the findings. Nevertheless the contrast is striking. 92% of successful applicants gave a positive rating to the clarity of programme guidelines (see Table 7.4.3d, below). A slightly lower but still substantial 82% rated positively the ease of completion of the online application process. Interestingly, 95% of this group gave a positive rating to Pobal staff's response to queries (83% rated this as either "very good" or "excellent"). Although the wording of the next two items differed slightly from the wording in the annual questionnaire, it is worth noting that over 90% gave positive ratings to the communications/updates on the status of the programme and the notification of its outcome. Obviously, there are very significant differences from the findings from unsuccessful applicants, leading to the impression that at least some of the more negative ratings (for example, in relation to Pobal staff responses to queries) may be due to overall disappointment with the content of those responses (i.e. failure to secure funding) and the ultimate outcome of the application to what was a very limited fund.

Table 7.4.3d Ratings of Childcare Capital 2012 Programme – Successful Applicants

Childcare Capital 2012	N =	Poor	Fair	Good	Very Good	Excellent	Positive Rating
Clarity of Guidelines on Programme Criteria	284	1%	7%	18%	39%	36%	92%
Online Application Process – Ease of Completion	284	6%	12%	21%	31%	30%	82%
Pobal Staff Response to any Queries Raised	283	1%	4%	12%	28%	55%	95%
Communication/Updates between Time of Application and Notification of Outcome	283	0%	7%	17%	39%	37%	93%
Notification of the Outcome of your Application - Clarity of Information and Instructions	284	2%	5%	13%	40%	39%	92%

The Childcare Capital Programme 2013 is already underway at the time of writing. Pobal has endeavoured to take on board as much of this feedback as possible, in terms of offering greater clarity in the (revised from 2012) programme criteria and guidelines for applicants.

7.5 Awareness of / Participation in Quality Initiatives

Key Figures

- 72% have attended a Síolta information session
- 19% of services have participated in / are participating in another quality-related programme

Recent years have witnessed significant developments within the Irish early years sector in terms of the quality agenda. Most notable have been the launches of Síolta (the National Quality Framework for Early Childhood Education). A series of questions were included in the questionnaire to ascertain levels of awareness of and engagement with various quality initiatives. Table 7.5.1 summarises the findings on levels of awareness and engagement. Just over **72% of respondents in each case reported that they had attended a Síolta information session**. Interestingly, this represents a decrease on the 2011 findings where 80% indicated that they had attended a Síolta information session.

Formal engagement with Síolta involves a childcare setting implementing the Síolta Quality Assurance programme, supported by a Síolta Mentor. At the end of 2012, there were 23 Síolta Mentors[21] in post, almost all of whom work in a part-time capacity in this role. The next question asked respondents whether their services were "had formally begun work with a Síolta Mentor" and 594 services reported being so. As occurred in 2011, however, the figures from this particular question cannot be relied upon, as data from the Early Years Education Policy Unit (EYEPU) of the

[21]Sixteen Coordinators are employed within Voluntary Childcare Organisations (Barnardos, Border Counties Childcare Network (BCCN), Childminding Ireland, Early Childhood Ireland, and Irish Steiner Kindergarten Association (ISKA). A further three are operating in three Dublin-based Prevention and Early Intervention Programmes (in Ballymun, Tallaght and Darndale) and four work with other organisations.

DCYA, from the end of 2012, show that a total of 121 services were at that point working formally with a Síolta Mentor. It is clear that some respondents misinterpreted the wording of this question (perhaps counting as "formal engagement" any contact/support they may have received from other agencies that had referred to Síolta) and the figure of 594 must therefore be disregarded. If one uses the EYEPU figure instead, it is clear that to date only a very small proportion of early years services (less than 3%) have been formally engaged in the Síolta process. As noted in the Goodbody (Dec 2011) evaluation of the initial implementation of Síolta: "*the Síolta Coordinator mentoring model is a resource intensive model. This creates a major resource issue in terms of a wider implementation of Síolta….An approach that combines a substantial increase in Coordinator numbers as well as a greater targeting of Coordinator resources will be necessary*" (p. 81). There was no significant change in the resources available for the implementation of Síolta during 2012 (apart from an increase in mentor numbers from 19 to 23). Having reached a very high level of awareness and initial engagement (in the form of attendance at an information session), the translation into widespread progress in formal implementation in childcare settings remains a significant challenge.

Almost one in five (19%) of services reported that they were either currently participating or had previously done so in *another* quality improvement programme. While services were not asked in the 2012 questionnaire to state what other Programmes they engaged with, some examples could be (the IPPA's Quality Improvement Programme, the NCNA Centre of Excellence programme, and BCCN's Quality Development and Accreditation Programme). Community-based services were somewhat more likely (22.5%) to have done so than private services (17.3%).

Table 7.5.1 Participation in Síolta Information Sessions and other Quality Programmes – Community/Private and All Services

	Community-Based (CB) (N =)	CB (%)	Private Provider (PP) (N =)	PP (%)	All (N =)	All (%)
Attended Síolta Information Session	649	74.3%	1,269	71.3%	1,918	72.3%
Participated/Participating in any other Quality Programme(s)	197	22.5%	308	17.3%	505	19.0%

Table 7.5.2, below, provides information by county on engagement with Síolta and other Quality Programmes. Síolta have run a number of information sessions across all counties, facilitated both by CCCs and by Voluntary Childcare Organisations (VCOs), over the last number of years. In terms of the proportion of services that have had at least one representative attend such a session, there is considerable variation between counties; the lowest levels of attendance to date were found in Cork County (54%) followed by Clare (55%) and the highest levels were in Sligo (95%), Waterford County (93%) and Leitrim (91%). Formal engagement with a Síolta Mentor (as captured in figures provided by EYEPU, as opposed to within the survey questionnaire) remains unevenly distributed across counties. It is also worth noting that in some counties, although there are very high levels of awareness and initial engagement (in the sense of attending an information session), it has not yet been possible to translate this into formal engagement with a Síolta Mentor. 91% of services in Leitrim, for example, have attended a Síolta information session but none is yet engaged formally in the Síolta process.

In terms of participation (current or previous) in other quality improvement programmes, again there is considerable variation across counties (ranging from 9% in Wexford and 10% in Galway to 36% in Longford). Some of this variation is likely to be the result of uneven access to such programmes across different areas of the country; Voluntary Childcare Organisations that have supported services to participate in such programmes have sometimes not been in a position to offer coverage (in terms of support/development staff) to all areas of the country.

Table 7.5.2 – Engagement with Síolta / other Quality Programmes by County Area

	No. of Services	Attended Síolta Info Session		Formal engagement with Síolta mentor[22]	Participation in other quality programme	
		No =	%	No =	No.	%
Carlow	34	23	68%	0	8	24%
Cavan	40	30	75%	0	12	30%
Clare	96	53	55%	6	16	17%
Cork City	66	40	61%	5	21	32%
Cork County	210	113	54%	4	38	18%
Donegal	107	76	71%	8	24	22%
Dublin City	168	125	74%	27	36	21%
Dun Laoghaire/ Rathdown	89	65	73%	5	14	16%
Fingal	153	105	69%	8	31	20%
South Dublin	162	124	77%	14	42	26%
Galway	163	117	72%	1	16	10%
Kerry	89	58	65%	0	22	25%
Kildare	130	98	75%	6	19	15%
Kilkenny	66	42	64%	2	9	14%
Laois	53	42	79%	0	10	19%
Leitrim	22	20	91%	0	6	27%
Limerick City	29	25	86%	2	6	21%
Limerick County	82	53	65%		12	15%
Longford	28	20	71%	0	10	36%
Louth	64	54	84%	1	22	34%
Mayo	75	60	80%	0	15	20%
Meath	112	82	73%	1	18	16%
Monaghan	41	36	88%	2	8	20%
Offaly	46	43	93%	0	10	22%
Roscommon	42	33	79%	8	8	19%
Sligo	44	42	95%	0	11	25%
Tipperary North	53	35	66%	1	12	23%
Tipperary South	52	37	71%		7	13%
Waterford City	29	23	79%	3	5	17%
Waterford County	44	41	93%	9	5	11%
Westmeath	54	46	85%	7	10	19%
Wexford	95	73	77%	0	9	9%
Wicklow	116	84	72%	1	16	14%
Total	2,654	1,918	72%	121	508	19%

[22] The data in this column comes from the Early Years Education Policy Unit in DCYA.

8. Challenges and Responses in the Early Years Sector

Key Figures
• 58.9% of services reported a reduced uptake of full day places • 42.9% of services reported a reduced uptake of school age places • 28.0% of services have had to reduce the working hours of staff working directly with children

The last number of years have been particularly challenging ones for the early years sector. The economic downturn has meant reduced uptake of childcare places by parents who have either lost their jobs or had their incomes reduced. Anecdotal evidence points to families reverting to less formal and less expensive forms of care for their children (relatives, informal childminding arrangements and so on). Many childcare services have therefore had to adapt to reduced fee incomes and, in some cases, have had to adapt their service model. At the same time, the introduction of the ECCE programme has introduced a level of stability and dependable income for many services. To get an indication of the extent to which services have felt the impact of this changed environment, respondents were presented with a list of possible impacts on their services and they were asked to indicate any/all that had applied to their services over the preceding two years. Table 8 sets out the responses given.

Almost three-fifths of all services reported a reduced uptake of full-time places. This trend appears to be more pronounced for private providers (61.9%) than for community-based providers (51.9%). It is worth noting that this trend was similar in 2011, despite the fact that respondents were asked to tick the items that had affected their services but were not offered a “not applicable” option. This option was given for the 2012 questionnaire. Just over two-fifths of services (42.9%) reported a reduction in uptake of school age places.

Relatively few respondents (9.2%) report having had to reduce the range of services they offer (e.g. by no longer catering for babies, or by no longer offering school age care). However, this figure has almost doubled from 2011 were only 5.2% of services reported same. The implication is that, despite reductions in the uptake of places in some services, most have managed to maintain the range of services offered and are hoping that an upturn in economic conditions will translate into renewed demand for places in their services. The proportion of services that have reduced their number of weeks open within the last two years is 9.7% which also shows an increase on the 2011 figure of 6.1%, again relatively low. In terms of staffing (which is the greatest single contributor to childcare services’ costs), one in six services (28%) has had to reduce the working hours of staff working directly with children, and 9.3% have had to make one or more of their childcare staff redundant over the last two years. Relative to other sectors in the economy, this level of redundancies is relatively low despite increasing from 5.3% in 2011 and again suggests that services are attempting, where at all possible, to retain their staff in employment but are having in some instances to resort to reducing working hours to cut costs. It is notable that in 2012, 28% of services reported having reduced the working hours of childcare staff. This has also risen sharply from 13.9% in 2011, despite having fallen from the previous years figure of 23.4% in 2010. It may be the case that most of such adjustments were made when the effects of the economic downturn were first felt (in 2008/9) and that there has been some levelling off since that time. The figure of 28% remains significant, however, and shows that services continue to have to make adjustments to their staffing arrangements to remain sustainable.

Table 8 Respondents' Ratings of Impact of Economic Downturn in the Last Two Years – Community/Private and all Services

	Community-Based	Private Provider	All
Reduced Uptake of Full-Time Places	51.9%	61.9%	58.9%
Reduced Uptake of School Age Places	38.1%	45.7%	42.9%
Reduction in Number of Hours Open to Children	10.5%	12.1%	11.5%
Reduced Range of Services Offered	9.3%	9.2%	9.2%
Reduction in Weeks per Year	11.2%	8.8%	9.7%
Reduction in Working Hours of Staff Working Directly with Children	22.5%	31.0%	28.0%
Necessity to Make Redundant Staff Working Directly with Children	7.4%	10.3%	9.3%

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9. Appendices

Appendix I - County Breakdown of Respondents 2012

County Breakdown	No. issued ABQ	No. of Responses Received	% Response Rate	Community-Based (CB) – No. issued ABQ	CB - No. of Responses Received	CB - % Response Rate	Private Provider (PP) – No. issued ABQ	PP - No. of Responses Received	PP - % Response Rate
Carlow	48	38	79.17%	16	17	106.25%	32	21	65.63%
Cavan	66	46	69.70%	27	17	62.96%	39	29	74.36%
Clare	141	105	74.47%	42	33	78.57%	99	72	72.73%
Cork City	94	83	88.30%	54	46	85.19%	40	37	92.50%
Cork County	362	251	69.34%	95	68	71.58%	267	183	68.54%
Donegal	150	121	80.67%	83	68	81.93%	67	53	79.10%
Dublin - City	391	208	53.20%	141	92	65.25%	250	116	46.40%
Dublin - Dun Laoghaire Rathdown	187	102	54.55%	27	21	77.78%	160	81	50.63%
Dublin - Fingal	317	179	56.47%	20	27	135.00%	297	152	51.18%
Dublin - South Dublin	228	187	82.02%	48	51	106.25%	180	136	75.56%
Galway	265	196	73.96%	90	75	83.33%	175	121	69.14%
Kerry	130	104	80.00%	58	51	87.93%	72	53	73.61%
Kildare	216	150	69.44%	18	10	55.56%	198	140	70.71%
Kilkenny	100	76	76.00%	28	25	89.29%	72	51	70.83%

Appendix I - County Breakdown of Respondents 2012 (Cont'd)

County Breakdown	No. issued ABQ	No. of Responses Received	% Response Rate	Community-Based (CB) – No. issued ABQ	CB - No. of Responses Received	CB - % Response Rate	Private Provider (PP) – No. issued ABQ	PP - No. of Responses Received	PP - % Response Rate
Laois	82	63	76.83%	17	17	100.00%	65	46	70.77%
Leitrim	35	26	74.29%	25	18	72.00%	10	8	80.00%
Limerick City	48	39	81.25%	21	16	76.19%	27	23	85.19%
Limerick County	126	92	73.02%	27	23	85.19%	99	69	69.70%
Longford	36	33	91.67%	13	16	123.08%	23	17	73.91%
Louth	117	83	70.94%	19	22	115.79%	98	61	62.24%
Mayo	121	97	80.17%	56	54	96.43%	65	43	66.15%
Meath	206	138	66.99%	23	13	56.52%	183	125	68.31%
Monaghan	58	54	93.10%	31	33	106.45%	27	21	77.78%
Offaly	70	53	75.71%	17	15	88.24%	53	38	71.70%
Roscommon	54	51	94.44%	25	24	96.00%	29	27	93.10%
Sligo	69	51	73.91%	32	23	71.88%	37	28	75.68%
Tipperary North	74	59	79.73%	15	11	73.33%	59	48	81.36%
Tipperary South	74	57	77.03%	30	21	70.00%	44	36	81.82%
Waterford City	40	39	97.50%	18	15	83.33%	22	24	109.09%
Waterford County	57	51	89.47%	22	18	81.82%	35	33	94.29%
Westmeath	91	66	72.53%	26	22	84.62%	65	44	67.69%
Wexford	141	113	80.14%	46	39	84.78%	95	74	77.89%
Wicklow	162	126	77.78%	25	17	68.00%	137	109	79.56%
Total	4,356	3,137	72.02%	1,235	1,018	82.43%	3,121	2,119	67.89%

Appendix II - Details of Children on a Waiting List – by Provider and Service Type/ Location 2012

	Community-Based				Private Provider			
	Number of Places Sought	Places Sought as % of Total Places Sought	Number of Children Attending	Places Sought as % of Children Attending*	Number of Places Sought	Places Sought as % of Total Places Sought	Number of Children Attending	Places Sought as % of Children Attending*
Full-Time	847	27.2%	6,761	12.5%	354	21.2%	13,620	2.6%
Part-Time	1,106	35.5%	8,824	12.5%	394	23.6%	7,643	5.2%
Sessional	806	25.9%	16,187	5.0%	833	49.9%	30,098	2.8%
Afterschool	358	11.5%	9,742	3.7%	89	5.3%	6,345	1.4%
Totals	3,117	100%	41,514	7.5%	1,670	100%	57,706	2.9%

	Rural				Urban			
	Number of Places Sought	Places Sought as % of Total Places Sought	Number of Children Attending	Places Sought as % of Children Attending*	Number of Places Sought	Places Sought as % of Total Places Sought	Number of Children Attending	Places Sought as % of Children Attending*
Full-Time	267	21.0%	9,931	2.7%	934	26.6%	10,450	8.9%
Part-Time	307	24.1%	7,580	4.1%	1,193	33.9%	8,887	13.4%
Sessional	588	46.2%	27,593	2.1%	1,051	29.9%	18,692	5.6%
Afterschool	111	8.7%	8,266	1.3%	336	9.6%	7,821	4.3%
Totals	1,273	100%	53,370	2.4%	3,514	100%	45,850	7.7%

*Numbers of children attending are from Tables 3.3.1 and 3.3.2

Appendix III – Breakdown of Attendance by Age and Service Type

Community Based	Full-Time (>5 hours)	Part-Time (3hrs31mins- 5hrs)	Sessional (3hrs30mins or less)	Total by Age Category
Babies (up to 1 yr)	683	473	113	1,269
Toddlers (1 and 2 yrs)	2,397	3,072	1,257	6,726
Pre-schoolers (3-5 yrs)	3,681	5,279	14,817	23,777
School Age (6-14 yrs)	N/A	4,458	5,284	9,742
Totals CB	6,761	13,282	21,471	41,514

Private Provider	Full-Time (>5 hours)	Part-Time (3hrs31mins- 5hrs)	Sessional (3hrs30mins or less)	Total by Age Category
Babies (up to 1 yr)	1,402	393	80	1,875
Toddlers (1 and 2 yrs)	4,433	1,762	1,214	7,409
Pre-schoolers (3-5 yrs)	7,785	5,488	28,804	42,077
School Age (6-14 yrs)	N/A	2,652	3,693	6,345
Totals PP	13,620	10,295	33,791	57,706

Appendix IV County Breakdown Showing Numbers on Waiting List and Vacancies

County	2011 No. of Responses	2011 Total No. on Waiting List	2011 Total No. of Vacancies	2012 No. of Responses	2012 Total No. on Waiting List	2012 Total No. of Vacancies
Carlow	45	309	325	38	249	198
Cavan	53	92	573	46	62	564
Clare	123	156	892	105	34	882
Cork City	90	191	721	83	124	486
Cork County	276	561	1958	251	317	1,922
Donegal	116	189	827	121	106	1,186
Dublin - City	222	1433	943	208	1,120	1,204
Dublin - Dun Laoghaire Rathdown	116	182	401	102	263	336
Dublin - Fingal	225	697	831	179	225	918
Dublin - South Dublin	233	669	1137	187	480	962
Galway	193	435	1283	196	391	1,166
Kerry	122	199	1026	104	107	1,060
Kildare	153	134	969	150	91	1,262
Kilkenny	76	135	771	76	160	511
Laois	70	152	563	63	68	581
Leitrim	28	38	162	26	4	218
Limerick City	48	146	525	39	60	695
Limerick County	114	138	654	92	79	571
Longford	34	48	369	33	19	360
Louth	93	203	782	83	122	853
Mayo	99	110	445	97	36	620
Meath	148	168	1122	138	96	1,173
Monaghan	56	88	603	54	44	564
Offaly	56	47	421	53	6	333
Roscommon	39	88	133	51	110	282
Sligo	53	178	361	51	52	334
Tipperary North	65	63	394	59	70	389
Tipperary South	72	248	507	57	20	550
Waterford City	30	152	292	39	56	349
Waterford County	53	46	242	51	47	347
Westmeath	60	68	432	66	39	1,036
Wexford	102	51	1038	113	71	881
Wicklow	138	202	754	126	59	821
Total	3,401	7,616	22,456	3,137	4,787	23,614

Appendix V Childcare Staff Numbers – Breakdown by County, Provider Type and Employment Status

	Full-Time			Part-Time			CE Scheme			CSP Scheme			JI			JobsBridge			Volunteer		
	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP
Carlow	122	84	38	60	37	23	6	6	0	0	0	0	0	0	0	0	0	0	1	1	0
Cavan	94	41	53	105	48	57	19	19	0	0	0	0	2	2	0	2	2	0	2	0	2
Clare	169	80	89	155	63	92	10	10	0	0	0	0	2	2	0	2	1	1	3	0	3
Cork City	173	82	91	137	82	55	50	50	0	0	0	0	0	0	0	1	0	1	1	1	0
Cork County	459	189	270	427	135	292	34	34	0	1	1	0	2	2	0	5	4	1	7	2	5
Donegal	179	106	73	222	139	83	37	37	0	2	2	0	2	2	0	8	5	3	11	3	8
Dublin - City	545	215	330	430	232	198	141	141	0	0	0	0	3	3	0	7	2	5	16	5	11
Dublin - Dun Laoghaire Rathdown	273	64	209	177	52	125	18	18	0	0	0	0	0	0	0	1	0	1	2	0	2
Dublin - Fingal	315	75	240	280	53	227	32	32	0	8	8	0	0	0	0	4	0	4	8	4	4
Dublin - South Dublin	473	125	348	387	129	258	72	72	0	0	0	0	5	5	0	2	1	1	8	4	4
Galway	417	167	250	300	141	159	31	31	0	0	0	0	0	0	0	0	0	0	10	2	8
Kerry	189	124	65	180	104	76	48	48	0	0	0	0	0	0	0	0	0	0	6	1	5
Kildare	331	25	306	230	35	195	10	10	0	2	2	0	1	1	0	3	0	3	10	0	10
Kilkenny	140	43	97	144	71	73	10	10	0	0	0	0	0	0	0	4	2	2	3	0	3
Laois	126	37	89	114	27	87	7	7	0	0	0	0	0	0	0	1	0	1	0	0	0
Leitrim	64	42	22	44	34	10	7	7	0	2	2	0	0	0	0	0	0	0	0	0	0
Limerick City	110	40	70	66	38	28	20	20	0	0	0	0	3	3	0	4	3	1	1	0	1
Limerick County	157	49	108	123	41	82	7	7	0	0	0	0	0	0	0	6	1	5	4	0	4
Longford	100	64	36	69	50	19	43	43	0	1	1	0	0	0	0	4	1	3	0	0	0
Louth	154	58	96	145	58	87	36	36	0	0	0	0	3	3	0	1	1	0	3	1	2
Mayo	126	67	59	151	94	57	25	25	0	3	3	0	0	0	0	6	3	3	0	0	0
Meath	243	41	202	220	35	185	10	10	0	0	0	0	0	0	0	1	0	1	5	0	5
Monaghan	146	107	39	59	34	25	29	29	0	0	0	0	2	2	0	4	4	0	1	1	0
Offaly	85	36	49	89	38	51	7	7	0	0	0	0	0	0	0	1	0	1	4	0	4
Roscommon	93	41	52	95	56	39	8	8	0	11	11	0	0	0	0	1	1	0	7	6	1

Appendix V Childcare Staff Numbers – Breakdown by County, Provider Type and Employment Status (Cont'd)

	Full-Time			Part-Time			CE Scheme			CSP Scheme			JI			JobsBridge			Volunteer		
	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP	Overall	CB	PP
Sligo	138	59	79	84	51	33	43	43	0	5	5	0	1	1	0	2	2	0	3	2	1
Tipperary North	99	18	81	98	27	71	9	9	0	0	0	0	0	0	0	0	0	0	4	0	4
Tipperary South	116	59	57	109	49	60	9	9	0	0	0	0	0	0	0	2	2	0	0	0	0
Waterford City	85	37	48	91	62	29	9	9	0	0	0	0	0	0	0	1	1	0	0	0	0
Waterford County	57	22	35	90	39	51	8	8	0	0	0	0	1	1	0	1	1	0	0	0	0
Westmeath	156	51	105	112	59	53	21	21	0	8	8	0	1	1	0	0	0	0	1	1	0
Wexford	216	89	127	174	73	101	31	31	0	5	5	0	1	1	0	2	2	0	6	1	5
Wicklow	185	46	139	221	27	194	30	30	0	0	0	0	1	1	0	1	0	1	9	0	9
Totals	6,335	2,383	3,952	5,388	2,213	3,175	877	877	0	48	48	0	30	30	0	77	39	38	136	35	101