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Evaluation of Year 4 of the Childcare Offer

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Views expressed in this report are those of the researcher and not
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Glossary

Acronym/Key word	Definition
Additional Learning Needs (ALN)	<p>The current SEN framework, in place for around 25 years, is being replaced by the ALN system, which was established by the 2018 Act. The definition for ALN will essentially be the same as for SEN. This is:</p> <ul style="list-style-type: none"> • the learner has a significantly greater difficulty in learning than the majority of others of the same age (that can't be addressed solely through differentiated teaching); or • the learner has a disability (for the purposes of the Equality Act 2010) which prevents or hinders them accessing education or training that's generally provided for others of the same age; and • the learning difficulty or disability calls for Additional Learning Provision (ALP).
Additional Support Grant	Grant available to enable local authorities to ensure that the childcare element of the Childcare Offer is inclusive to eligible children with special educational needs (SEN). See note below.
Coronavirus Childcare Assistance Scheme (C-CAS)	Coronavirus Childcare Assistance Scheme for pre-school children of critical workers and vulnerable children from April to August 2020.
Childcare Offer (the Offer)	Up to 30 hours a week of government-funded early education and childcare for working parents of three- and four-year-olds, for up to 48 weeks of the year.
Coronavirus Job Retention Scheme (JRS)	A UK government wage support measure designed to protect jobs in the wake of the economic impacts of the COVID-19 pandemic, and to support employers who are facing difficulties to continue paying wages rather than making people redundant. Commonly referred to as furlough.
Cwlwm	Childcare Wales Learning and Working Mutually – a consortium of the five main childcare organisations in Wales. Cwlwm organisations are Early Years Wales, Clybiau Plant Cymru Kids'

	Clubs, Mudiad Meithrin, National Day Nurseries Association (NDNA Cymru) and PACEY Cymru.
Cylch Meithrin	A Cylch Meithrin is a Welsh-medium playgroup (plural: Cylchoedd).
Flying Start	Welsh Government programme providing support in some of Wales's most disadvantaged communities for children (0-3 years) and their families. Part of the Flying Start provision includes 12.5 hours of funded childcare per week, for 39 weeks, to support the development of the 2–3-year-olds eligible for support.
Foundation Phase	The statutory curriculum for all three to seven-year-olds in Wales.
Foundation Phase Nursery (FPN)	<p>Foundation Phase Nursery – part-time education (a minimum of 10 hours a week) of funded early education for 3- and 4-year-olds during school term time, from the term following a child's 3rd birthday. Sometimes referred to as early education entitlement and funded early education.</p> <p>Children who are eligible to start nursery education in either January/April following their third birthday, can access one or two terms of FPN education – referred to as FPN1 before progressing to a full academic year of FPN – called FPN2 - the following September onwards. This is the early education part of the Childcare Offer.</p>
Her Majesty's Revenue and Custom (HMRC)	The UK's tax, payments and customs authority.
National digital service	Work is underway to plan and design a central administrative service – this is being designed and developed to make the administration of parent applications and arrangements for making payments to providers more efficient, and to provide a more consistent experience for parents and providers across Wales.
Parents Childcare and Employment (PaCE)	<p>Parents Childcare and Employment (PaCE) provides Childcare support for parents whilst training or looking for work. PaCE project provides one to one advisor support. They help and support you into work.</p> <p>The project is funded through the European Social Fund.</p>

Special Educational Needs (SEN)	Children have special educational needs if they have a learning difficulty which calls for special educational provision to be made for them. “Special Educational Needs” (SEN) is changing to “Additional Learning Needs” (ALN). See ALN above.
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Executive Summary

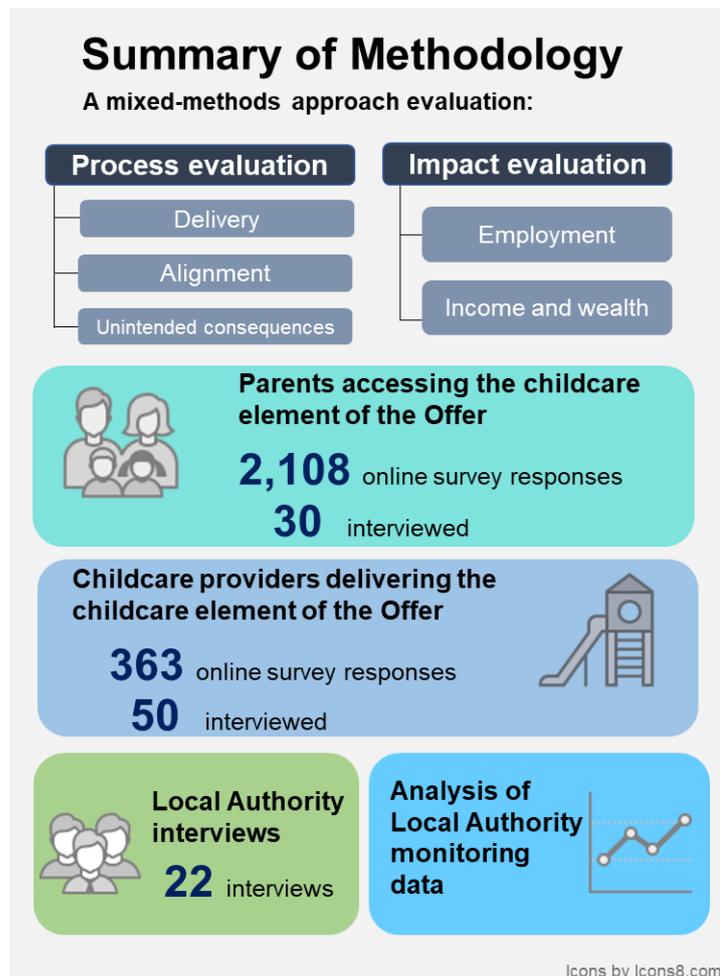
Introduction

The Welsh Government's Childcare Offer for Wales provides eligible working parents with 30 hours of childcare and early education for three and four-year-olds for 48 weeks per year. This evaluation report relates to the period from September 2020 to August 2021 and during that period the Offer was accessed by 17,824 children.

Methodology

The evaluation set out to assess how effectively the Offer is being delivered to families; provide lessons to inform future delivery; explore the impact that the Offer is having on parental employability, wellbeing and disposable income and how it may have helped to mitigate the effects of COVID-19 and the impact of the Offer on the childcare sector.

The evaluation evidence is based on virtual interviews with Welsh Government officials, local authorities and key stakeholders; an online survey and interviews with participating childcare providers; an online survey and interviews with parents who have accessed the Offer and a review of monitoring data.



Implementing the Offer

Key findings

Awareness of the Offer is still high due to promotion on social media and word of mouth.

Issues with providing accompanying documentation and being time consuming continue to be common reasons why parents found the application process difficult.

COVID-19 created challenges for families accessing FPN and childcare at **more than one childcare setting**.



Local authorities felt well informed and fully involved in moving towards **a new digital service**.



Local Authorities continued to have **a close working relationship** with Welsh Government.



Harmonisation of funding rates for FPN with £4.50 per hour for the Offer will help non-maintained settings continue delivering FPN.



Some providers **suspended transport services** or limited pick up from and drop off to other settings to **maintain social distancing bubbles**.



Icons by Icons8.com

Source: Childcare Provider Survey 2021. N= 363
Childcare Offer 2021 Parent Survey. N= 2108

The Offer's influence on providers

The Offer's influence on providers

Key findings

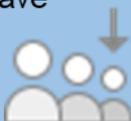
Most providers are now comfortable with **LA online systems**, but some still struggling.



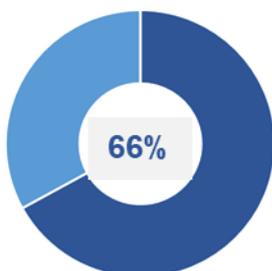
As a result of COVID-19 providers have been carrying out **more outdoor activities**.



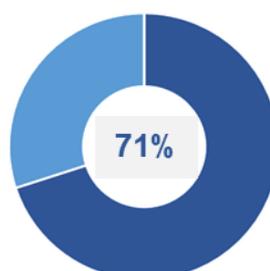
General **staff shortages** within the sector have been exacerbated by COVID-19.



Dealing with parents' various queries regarding the Offer can be time-consuming for providers.



reported improved profitability



reported improved sustainability

Icons by icons8.com
Source: Childcare Provider Survey 2021. N= 363

Parents' experiences and impact of the Offer

Key findings

Accessing the Offer

93% of those surveyed who wanted to access Welsh-medium childcare through the Offer were able to.

Cymraeg

Over half of parents accessing the Offer* earned below the national average annual full-time salary level (£28,158 per annum).**



88% were using formal childcare before accessing the Offer. Of these, 45% used more hours of formal childcare whilst accessing the Offer.

Impact on parents



73% said the Offer made it easier for them to undertake their work.



53% reported that the Offer had increased their flexibility in the way they worked.



30% would be working fewer hours had the Offer not been available to them.



46% said the Offer had given them the potential to increase their earnings.

Icons by Icons8.com

*Source: Childcare Offer for Wales termly monitoring data returns

** StatsWales, Average (median) gross weekly earnings by UK country -English region and year
Childcare Offer 21 Parent Survey. N= 2108.

Conclusions and recommendations

The Childcare Offer was reopened to new eligible entrants in September 2020. Re-opening applications created additional administrative burdens for delivery local authorities during September and the ongoing situation of the pandemic continued to create various delivery challenges throughout the year. Despite these challenges the delivery of the Offer during year 4 generally saw a return to business as usual with take-up of the Offer amongst eligible children being comparable with previous years and providers able to accommodate the demand for places generated by this take-up.

Awareness of the Offer amongst eligible parents remains high despite the limitations that COVID-19 placed on local authorities' and other stakeholders' ability to directly promote the Offer to parents. Parents' knowledge of the details relating to how the Offer works, who is eligible for it and what they are entitled to, appears to be relatively low in many cases despite continued efforts by the Welsh Government and local authorities to increase parents' understanding. The evaluation also found that organisations and programmes also working with parents of young children, including out of work parents, are not always sufficiently informed about the Offer to pass on the details to the parents they support. This may limit the Offer's ability to encourage and enable some out of work parents to start or return to work.

Recommendation – local authorities may need a renewed focus on raising awareness of the Offer amongst partner organisations operating within their area, including PaCE and Job Centres, and provide them with details relating to the Offer that they can pass on to the parents they support.

Recommendation – the Welsh Government should consider broadening the national communication campaign of the Offer to further promote the Offer and what it entails to reach a wider audience of parents across Wales.

Administration processes implemented by delivery local authorities appear to be well established. Most childcare providers are now very familiar with the administration process required and receive the payments due within the agreed dates. Some frustrations continue to be reported by some providers regarding different systems and processes adopted by different local authorities – especially for those who deal with two or more delivery authorities. However, differences in delivery systems currently in place should be replaced by one common process following the introduction of the forthcoming national digital service.

Some confusion remains amongst parents and providers in relation to the different hours of FPN and therefore funded childcare available across different local authority areas. As such the recommendation included in the year 3 report that 'in parallel to the ongoing work of developing a national administration system, the Welsh Government should consider further reviewing the options for standardising the number of hours of one or both elements of the Offer,' remains valid.

The prospect of implementing the new digital service was generally welcomed by stakeholders and local authorities. Concerns were expressed relating to the digital literacy levels and access to technology amongst some childcare providers, particularly some childminders, and therefore their ability to access any new digital services.

Recommendation – Welsh Government and local authorities need to consider how best to support digital literacy in the sector to enable them to use and access the systems and processes of the new national digital service. Welsh Government may need to ensure that local authorities have the resources required to deliver support of this nature.

Impact of the Offer on parental employability, wellbeing and disposable income

A core aim of the Childcare Offer for Wales is to ‘remove barriers to secure employment for those parents who want to work or start a business but are currently constrained by childcare pressures.’ During the last 18 months, many parents have had to change their working practices in light of COVID-19 and opportunities for parents to change jobs, increase working hours and earnings or gain promotions within their current job roles have been limited in many cases. However, Year 4 findings indicate that the Offer has enabled many parents to increase their earnings during this period, especially those within lower income groups. The Offer has also provided parents more flexibility in the way they work, including those working from home. One in 10 parents surveyed noted that they would not be in work during this period if it wasn’t for the support provided by the Offer.

Some stakeholders questioned the extent to which the Offer creates an incentive for parents to start or return to work even before the outbreak of the pandemic. Some stakeholders were of the view that for the Offer to encourage more parents back into work or self-employment, it should be available to younger age groups i.e., under threes as well as three and four-year-olds.

Recommendation – the Welsh Government might wish to consider undertaking further research into the costs and benefits of extending the Offer’s eligibility criteria, in particular to cover younger children.

One of the areas where the Offer has had a significant positive impact during year 4 is the extent to which it has supported the mental health and wellbeing of parents and children across all income groups. Parents, providers, and wider stakeholders referred to the potential detrimental effect that the first lockdown may have had on the wellbeing, as well as the emotional and social development of young children and welcomed the Offer as a means to help address this.

However, the findings also indicate that the demand for Additional Learning Needs (ALN) support for young children has also increased during year 4. Some stakeholders and childcare providers were of the view that addressing these effects of lockdown on the

development and wellbeing of some children may take a few years and therefore the demand on ALN support services is likely to increase as a consequence.

Recommendation – the Welsh Government will need to ensure that sufficient resources are available to fund potential increases in the demand for ALN support provided through the Offer.

Impact on the childcare sector

COVID-19 has had a considerable effect on the childcare sector in Wales in relation to both the ability of parts of the sector to continue to provide childcare services as well as the commercial viability of individual settings. The considerable financial support provided to the sector by the Welsh Government through schemes such as the Childcare Providers Grant has enabled many providers, who would otherwise have permanently closed, to remain in business. Shifts and changes in the way many parents have accessed formal childcare during year 4 has, in many cases, seen an increase in the demand for provision in some settings, especially day nurseries and a fall in the demand for some sessional / playgroup settings, after school clubs and childminders. As a result, although the financial viability of the sector as whole currently appears reasonably stable, for some settings the situation moving forward remains precarious.

Year 4 findings indicate that the biggest challenge currently facing the sector is the retention, recruitment and general morale of the childcare sector workforce. There are concerns that many workers could leave the sector in the very near future which would in turn influence the capacity of the sector to supply the childcare required for the Offer and more broadly.

Recommendation – the Welsh Government, local authorities and other stakeholders including Cwllwm members should consider ways to further celebrate the work of childcare workers in order to raise morale and attempt to stem the outward flow of workers.

Recommendation – the Welsh Government should consider implementing new—and expand existing—employment programmes aimed specifically at encouraging and supporting individuals to work in the childcare sector in Wales.

The year 3 evaluation findings included a recommendation that ‘the Welsh Government should prioritise reviewing the hourly funding rate paid to providers with a view to increasing it from the £4.50 / hour rate at which it was set in 2017’. During year 4 of the Offer, the rate remained at the £4.50 prompting further calls from many providers that the rate should be revised upwards. However, there was also recognition that the Welsh Government has also committed significant financial resources to support individual settings within the sector.

There were some concerns were also expressed in relation to the provision of childcare funded through Flying Start in that increases in funding to deliver the Childcare Offer could either create an incentive for some providers to favour the provision of the Offer over Flying

Start childcare provision, or put financial pressures on local authorities to match any increases offered to deliver the Childcare Offer with equal or greater increases in the funding to deliver Flying Start supported childcare.

Recommendation – the Welsh Government should continue to review the funding rate offered to providers for the delivery of childcare supported by the Offer. However, as part of the review, the Welsh Government should also consider the implications any increase in the funding rate would have on the cost and delivery of other early years provision.

The implementation of the fourth year of the Offer has gone well and has generated much-needed benefits for the families who have taken up the funded childcare. The financial support provided by the Welsh Government to childcare settings has ensured that the sector is currently more financially viable than would otherwise have been the case. Looking ahead there are challenges facing the childcare sector, and therefore delivery of the Childcare Offer, and chief among them is the workforce, and the ability of settings to recruit and retain staff.

1. Introduction

- 1.1 The Welsh Government's Childcare Offer for Wales provides eligible working parents with up to 30 hours of childcare and early education for three and four-year-olds for 48 weeks per year. This evaluation report relates to the period from September 2020 to August 2021 – the fourth year of implementing the Childcare Offer ('the Offer').

Background

- 1.2 The Welsh Government has committed to providing 30 hours a week of government-funded early education and childcare for up to 48 weeks of the year. All local authorities in Wales are required to provide a minimum of 10 hours of early education a week to all three and four-year-olds during term-time, delivered via Foundation Phase Nursery (FPN). This can be provided in either a maintained (school) setting, or a funded non-maintained (childcare) setting. During the 39 weeks of school term-time, the Offer is made up of both this funded early education provision delivered via FPN and additional hours of funded childcare. The FPN hours vary from local authority to local authority, but most commonly 12.5 hours of early education is available per week, leaving 17.5 hours of funded childcare per week during term-time as part of the Offer. For the remaining 9 weeks of entitlement, which fall in the school holidays, the entitlement is to 30 hours of funded childcare. There are 4 unfunded weeks in every year.
- 1.3 Childcare under the Offer is available to three and four-year-old children whose parents earn on average at least a weekly minimum equivalent to 16 hours at the applicable national minimum wage, but earn less than £100,000 per year. All parents (or guardians, step-parents and long-term live-in partners within a household) are eligible for the Offer if they have a child within the age range and meet the definition of a working parent.
- 1.4 The Offer defines working parents as those who are employed, self-employed or on a zero-hours contract. Both parents in a two-parent family and the sole parent in a single-parent family must be working to qualify for the Offer. However, there are some exceptions: for example, where one parent is working, and the other has caring responsibilities (other than for their own children) or when one parent is

working, and the other is disabled or incapacitated, the working parent is eligible for the Offer.

- 1.5 This report focuses on the government-funded childcare component of the Offer, and unless otherwise stated references to the Childcare Offer can be taken to mean funded childcare provision. The FPN component is currently delivered through a separate mechanism and is not considered in any detail in this evaluation.

Delivery of the Childcare Offer to date

- 1.6 The Childcare Offer was launched in 2017 in seven pilot areas. The phased rollout of the Offer continued into September 2018, with a new delivery model introduced consisting of some local authorities taking on the role of delivery authorities responsible for processing applications and processing payments, and engagement authorities responsible for promoting the Offer to eligible parents and providers. This delivery model remained in place during the full roll out in 2019 and continued to remain in place during year 4 of the Offer’s delivery. An overview of these partnership arrangements is presented in the figure below.

Figure 1.1: Delivery and Engagement local authorities

Delivery Authorities	Engagement Authorities
Anglesey and Gwynedd*	Conwy
Blaenau Gwent*	Torfaen
Flintshire*	Wrexham
	Denbighshire
RCT*	Merthyr Tydfil
	Bridgend
Newport	Monmouthshire
	Vale of Glamorgan
Ceredigion	Carmarthenshire
	Pembrokeshire
	Powys
Cardiff	
Neath Port Talbot	
Swansea*	
Caerphilly*	

* Part of the pilot early implementation in Year 1, 2018-2019.

Year 4 implementation and changes as a result of COVID-19

- 1.7 The evaluation of the second year of the early implementation of the Offer assessed the effectiveness of the delivery of the Offer, the impact the Offer was having on parental employability, wellbeing and disposable income, the impact of the Offer on the childcare sector on different types of childcare providers, changes to business practices and the effect of intervention into the childcare market. The second-year evaluation report was published in December 2019.¹
- 1.8 The evaluation of the third year of the Offer continued assessing the early implementation of the Offer, with the delivery and engagement local authority model maintained for 2019 and 2020.
- 1.9 Due to the outbreak of COVID-19 in March 2020, there were changes to the delivery of the Offer. On 20 March 2020, the Welsh Government announced that parents needed to keep their children at home, and schools, childcare and play settings should only be open to those children who needed to attend due to being children of critical workers² and to more vulnerable children. This was to ensure that social distancing requirements were maintained, and the risks of transmission reduced.³
- 1.10 In March 2020, the Welsh Government committed to maintaining payments to providers for childcare under the Offer, even when a setting was closed, or a child was unable to attend. This commitment continued for three months, ending on the 19th of June 2020.
- 1.11 In April 2020, the Offer was temporarily suspended to new entrants for a period of 3 months. The budget for the Offer was repurposed under the Coronavirus Childcare Assistance Scheme (C-CAS) to cover the costs for the pre-school age children of critical workers and vulnerable children.

¹ Glyn., E, Harries, S., Lane, J., Lewis, S.; [Evaluation of the early implementation of the Childcare Offer for Wales: year two](#), Cardiff: Welsh Government, GSR report number 57/2019 [Accessed 3rd December 2021]

² For the purposes of C-CAS critical workers include: Health and social care workers; Public safety (emergency workers) and national security workers; Education and childcare workers; Food and other necessary goods workers; Transport workers; Utilities, communication and financial services workers; Key public service workers

³ Welsh Government, [The Childcare Offer for Wales – Transitional Guidance as a result of Covid-19 - Guidance for Local Authorities in Wales](#) November 2020, WG41684, Digital ISBN: 978-1-80082-476-8 [Accessed 3rd December 2021]

1.12 In June 2020, the Welsh Government confirmed that it would extend the provision of C-CAS and maintain the suspension of the Offer to 31st August. It also agreed to only maintain payments under the Offer for children who were eligible in March 2020, and where the setting was open and the child was in regular attendance.

Year 4 implementation

1.13 It was announced that childcare services could be expanded from 22nd June 2020, with children who accessed the Offer before March 2020 able to return to funded childcare. The Welsh Government reopened the Offer to new entrants from 1st September, with local authorities processing new entrants' applications from August. The C-CAS closed on 31st August 2020.

1.14 The Offer's delivery and engagement local authority model was continued for 2020-2021, with local authorities working together to deliver the Offer within their areas from 1st September 2020.

1.15 This report presents findings from the evaluation of the fourth year of the early implementation of the Offer. Further details of the evaluation methods are presented in section 2 of this report.

Overview of numbers accessing the Offer

1.16 During the period September 2020 to August 2021, the Offer was accessed by 17,824 children. Table 1.1 presents the overall numbers accessing the Offer broken down by local authority.

Table 1.1: Number of children accessing the Offer in each local authority between September 2020 and August 2021

Local authority	No. of children accessing the Offer
Blaenau Gwent	342
Bridgend	461
Caerphilly	1,018
Cardiff	2,513
Carmarthenshire	906
Ceredigion	349
Conwy	713
Denbighshire	841
Flintshire	154
Gwynedd	916
Isle of Anglesey	536
Merthyr Tydfil	150
Monmouthshire	706
Neath Port Talbot	838
Newport	1,024
Pembrokeshire	578
Powys	998
Rhondda Cynon Taf	765
Swansea	1,108
Torfaen	620
Vale of Glamorgan	1,010
Wrexham	1,278
Total	17,824

Source: Termly monitoring data

1.17 For each school term, local authorities collate information on the number of hours of childcare each parent has booked and the number of hours each child has attended. The mean average number of hours booked and attended per child each term, from September 2020 to August 2021, is presented in Table 1.2

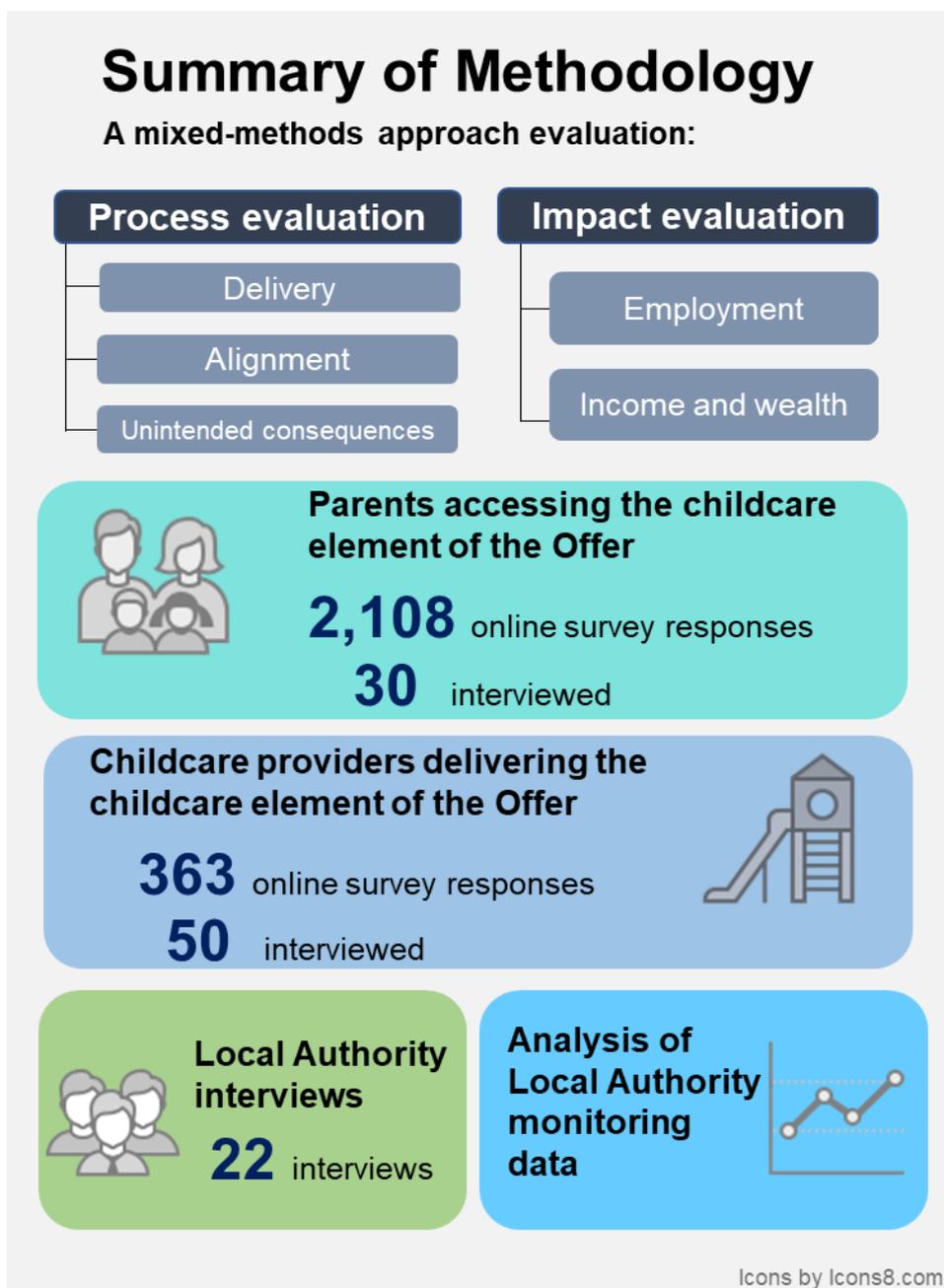
Table 1.2: Average number of hours booked and attended per child each term between September 2020 and August 2021

Term	Average no. of hours booked	Average no. of hours used
Autumn	219	201
Spring	188	165
Summer	228	211

Source: Termly monitoring data

2. Methodology

2.1 This section details the specific research questions for the evaluation and outlines the methodology adopted, including an overview of each strand of the research.



Evaluation Aims

2.2 In 2017, Arad Research was appointed to undertake an evaluation of the implementation of the [Offer's first year](#) and subsequently, the contract was extended to evaluate the delivery of the [second year](#), and the [third year](#), which also included the [Evaluation of the Coronavirus Childcare Assistance Scheme](#) (CCAS). Arad was then appointed to undertake the evaluation of the fourth year – this report.

The evaluation has had the following main aims which have remained broadly the same since the first evaluation:

- Evaluate how effectively the Offer is being delivered to children and parents and provide lessons to inform future delivery.
- Evaluate the impact that the Offer for Wales is having on parental employability, wellbeing and disposable income (linked to poverty).
- Evaluate the impact of the Offer for Wales on the childcare sector, looking at the effect on different types of childcare providers, changes to business practices and the effect of intervention into the childcare market.

2.3 The evaluation for this fourth year is again focusing on these aims, covering the period of delivery between September 2020 and August 2021 and draws on the views and experiences of Welsh Government officials, local authority representatives, stakeholder organisations and participating providers and parents.

Overview of methodology

2.4 A mixed methods approach was adopted for the evaluation, which involved several research strands alongside an analysis of the project monitoring data. Table 2.1 presents an overview of the different strands of the research.

Table 2.1. Overview of methodology

Participant	Method	Number of respondents	When
Welsh Government Officials	Video interviews	9	June - August 2021
Local authorities	Video interviews	22	September – October 2021
Key stakeholder organisations	Video and telephone interviews	16	August – September 2021
Participating childcare providers	Online survey	363	July 2021
Participating childcare providers	Telephone interviews	50	August – October 2021
Participating parents	Online survey	2,108	July - August 2021
Participating parents	Telephone interviews	30	September – October 2021

Contextual interviews

2.5 Interviews were held with members of the Welsh Governments' Childcare Offer team to gain further insights into the context within which the year was being delivered. This included the Welsh Government's response to the COVID-19 pandemic as well as changes in policies relating to early provision, including changes to the funding rate offered to non-maintained settings delivering FPN.

2.6 The local authorities' Childcare Offer teams were invited to take part in virtual discussion groups in spring 2021 to share their experiences of the Offer. Engagement authorities were invited to one group discussion and delivery authorities invited to the other. Soon after the end of the Year 4 delivery period (September and October 2021) a series of interviews were conducted with all local authorities' Childcare Offer team representatives. These interviews gave each local authority's Childcare teams the opportunity to give their views on a number of aspects of the Offer between September 2020 and August 2021. These included:

- Childcare Offer take-up compared to previous years;
- Delivery and how COVID-19 has influenced coordination of the Offer;
- Partnership working between local authorities;

- Providers' experiences in the last year;
- Links to Foundation Phase Nursery provision;
- Links between the Offer and other childcare provision including Flying Start and Parents, Childcare and Employment (PaCE.);
- Future capacity of the childcare sector in light of COVID-19, including whether any settings have been forced to permanently close.

Interviews with key stakeholders' organisations

- 2.7 Key stakeholders were interviewed during the evaluation. Video interviews were conducted with representatives of the five Cwlwm organisations,⁴ and also a sample of PaCE and Flying Start representatives including two PaCE delivery managers and two PaCE advisers, four representatives from Flying Start, and two representatives from the Welsh Government Foundation Phase team.
- 2.8 Interviews focused on stakeholders' views on the design and implementation of the Childcare Offer and outcomes and impacts of the Offer. The focus of interviews with the representatives from PaCE, Flying Start and the Foundation Phase team was to explore how the Childcare Offer links to existing provision and programmes.

Survey of childcare providers

- 2.9 An online survey of childcare providers registered and delivering the Childcare Offer was conducted in July 2021, with a link distributed to all childcare providers in Wales who had delivered the Offer between September 2020 and July 2021. Topics within the survey included: the communication providers received from local authorities; the influence of the Offer on provider delivery; impact of the Offer on providers' sustainability; as well as the influence of COVID-19 on providers' delivery of provision. The survey questionnaire is included in Annex B.
- 2.10 For this stage of the fieldwork, using a census approach, all providers delivering the Childcare Offer within each local authority were invited to take part in the survey. A total of 2,252 providers were contacted via email, with a text message also sent out at the same time. A second email was sent two weeks after the initial invitation, which reminded providers of the survey and the deadline for closing the survey as the end of August 2021.

⁴ Childcare Wales Learning and Working Mutually – a consortium of the five main childcare organisations in Wales. Cwlwm organisations are Early Years Wales, Clybiau Plant Cymru Kids' Clubs, Mudiad Meithrin, National Day Nurseries Association (NDNA Cymru) and PACEY Cymru.

2.11 The survey was completed by 363 providers with a response rate of 16 per cent.⁵ Table 2.2 shows the breakdown of survey responses and the response rate as a proportion of the sampling frame by local authority.

Table 2.2. Providers survey response rates by local authority

Local authority	No. of responses	Response rate as a proportion of sampling frame (%)*
Blaenau Gwent	8	17
Bridgend	2	7
Caerphilly	27	12
Cardiff	46	17
Carmarthenshire	17	9
Ceredigion	17	18
Conwy	22	19
Denbighshire	13	12
Flintshire	22	12
Gwynedd	28	22
Anglesey	7	11
Merthyr Tydfil	2	11
Monmouthshire	8	7
Neath Port Talbot	19	12
Newport	15	10
Pembrokeshire	17	17
Powys	19	11
Rhondda Cynon Taf	6	7
Swansea	16	16
Torfaen	8	11
Vale of Glamorgan	22	12
Wrexham	14	10
Total	355**	

*This refers to the survey response rate as a percentage of providers in each local authority who delivered the Offer and whose contact details were shared by local authorities via Welsh Government.

**Some providers did not indicate the local authority where they are based

Source: Survey of providers delivering the Offer

⁵ The response rate exceeded the minimum number of 328 responses required to be 95% confident that the providers' survey responses were reliable between a 5 per cent margin of error. The larger the sample of the population (the providers survey was distributed to 2,252) the more we can be confident that providers' answers reflect the views of the total population of providers who delivered the Offer.

Interviews with participating childcare providers

2.12 A total of 500 childcare providers registered and delivering the Childcare Offer were contacted via email and text to invite them to take part in a telephone interview. The providers were contacted in batches during August and September 2021. A total of 50 providers were interviewed. Interviews focused on processes and delivery of the Offer including any changes made to provision between September 2020 and August 2021; impact of the Offer on the sustainability of providers; and lessons learnt. The topic guide is included in Annex A.

Survey of parents

2.13 An online survey of parents accessing childcare under the Offer was conducted in August 2021, with a link distributed to all parents across Wales who had received support through the Offer between September 2020 and August 2021. Topics within the survey included the application process; what parents' childcare arrangements were prior to accessing the Offer; suitability of the provision on offer; and the impact of the Offer on the family and work opportunities for parents. The survey questionnaire is included in Annex B.

2.14 For this stage of the fieldwork, using a census approach, all parents taking up the Childcare Offer within each local authority were invited to take part in the survey. A total of 17,380 parents were contacted via email, with a text message also sent out at the same time. A second email was sent two weeks after the initial invitation, which reminded parents of the survey and the deadline for closing the survey as the end of August 2021.

2.15 The survey was completed by 2,108 parents with a response rate of 12 per cent.⁶ Table 2.3 shows the breakdown of survey responses and the response rate as a proportion of the sampling frame by local authority.

⁶ The response rate exceeded the minimum number of 376 responses required to be 95% confident that the parents' survey responses were reliable between a 5 per cent margin of error. The larger the sample of the population (the parents survey was distributed to 17,380) the more we can be confident that parents' answers reflect the views of the total population of parents who accessed the Offer.

Table 2.3. Parent survey response rates by local authority

Local authority	No. of responses	Response rate as a proportion of sampling frame (%)*
Blaenau Gwent	53	17
Bridgend	31	12
Caerphilly	106	12
Cardiff	251	13
Carmarthenshire	114	12
Ceredigion	49	15
Conwy	94	15
Denbighshire	92	13
Flintshire	153	12
Gwynedd	118	14
Isle of Anglesey	66	14
Merthyr Tydfil	3	3
Monmouthshire	88	14
Neath Port Talbot	58	7
Newport	113	12
Pembrokeshire	72	13
Powys	129	14
Rhondda Cynon Taf	62	12
Swansea	179	11
Torfaen	55	10
Vale of Glamorgan	102	11
Wrexham	120	12
Total	2,108	

*This refers to the survey response rate as a percentage of parents in each local authority who accessed the Offer and whose contact details were shared by local authorities via Welsh Government.

Source: Survey of parents accessing the Offer

Interviews with participating parents

2.16 Interviews were conducted with 30 parents who had accessed childcare under the Offer. Parents who completed the survey were asked whether they were happy to be interviewed. An initial sample of 50 parents—broadly representative of local authority area and type of setting used (service type and language medium)—were contacted by email to request an interview. When the first tranche of interviews were booked another sample of 50 parents were contacted, resulting in 30 telephone interviews.

2.17 Interviews broadly focused on parents' awareness of, and information received about the Childcare Offer; views on the application process; how parents accessed the Childcare Offer during term time and school holidays; and what difference the Childcare Offer has made to parents, both financially and in terms of employability.

3. Implementing the Offer

Implementing the Offer

Key findings

Awareness of the Offer is still high due to promotion on social media and word of mouth.

Issues with providing accompanying documentation and being time consuming continue to be common reasons why parents found the application process difficult.

COVID-19 created challenges for families accessing FPN and childcare at **more than one childcare setting**.



Local authorities felt well informed and fully involved in moving towards a **new digital service**.



Local Authorities continued to have a **close working relationship** with Welsh Government.



Harmonisation of funding rates for FPN with £4.50 per hour for the Offer will help non-maintained settings continue delivering FPN.



Some providers **suspended transport services** or limited pick up from and drop off to other settings to **maintain social distancing bubbles**.



Icons by Icons8.com

Source: Childcare Provider Survey 2021. N= 363
Childcare Offer 2021 Parent Survey. N= 2108

- 3.1 The findings presented in this section draw mainly on evidence gathered from local authority representatives as well as representatives from the Childcare Offer and Foundation Phase teams within the Welsh Government. The findings in this section also reflect some of the views of parents and childcare providers, although these views and experiences are presented in more detail in other sections that follow.
- 3.2 This section begins with a review of the take-up of the Offer during this period, and the influence that temporary changes in the eligibility criteria had on processing applications for the Offer. The section then goes on to review the influence of COVID-19 in relation to the ability of children and parents to take up all the hours available to them through the Offer, and the ability of local authorities and other partner organisations to communicate with and raise awareness of the Offer amongst parents. The section goes on to review how local authorities are preparing for the introduction of the new centralised digital service, before finally reviewing how the Offer has been delivered alongside other early years provision.

Take-up of the Offer

- 3.3 During the period September 2020 to August 2021, the Offer was delivered to 17,824 children.⁷ This is relatively consistent with, if not slightly higher than, the take-up recorded in previous years.⁸ Local authority representatives noted that the take-up of the Offer started a little cautiously in September 2020, as many parents at this stage remained uncertain about accessing formal childcare amidst COVID-19 concerns. However, most local authorities also noted that soon after this cautious start, take-up of the Offer from the end of September 2020 onwards was comparable with that of previous years.
- 3.4 The continued and consistent level of take up of the Offer during year 4 of its implementation, suggests that awareness of the Offer among eligible parents remained relatively high during this time, even though opportunities to promote it were limited due to COVID-19 restrictions – see also paragraph 3.17. Local authority representatives noted a few factors that are likely to have contributed to

⁷ This figure is taken from the termly monitoring data that all local authorities return to Welsh Government.

⁸ In year 2, 15,929 children used the Offer (the Offer was fully rolled-out by the end of the year) and in year 3, 16,377 children used the Offer (between September 2019 and March 2020).

the continued level of awareness of the Offer, including the use of social media and promotion through word of mouth.

- 3.5 The availability of C-CAS funded childcare for critical workers and vulnerable children during the first lockdown also played an important role in raising awareness of the Offer according to some local authority representatives. They noted that many critical worker parents, who had previously relied on informal childcare arrangements, found themselves needing to rely on formal childcare arrangements during the lockdown, and accessed this provision through the support of C-CAS. By accessing C-CAS funded provision, some of these parents became aware for the first time that they would also be eligible for the Offer – and this, in the view of these local authorities, supported greater take-up of the Offer during the fourth year of implementation.
- 3.6 Some local authority and Welsh Government representatives were also of the opinion that some parents were taking up the funded provision available through the Offer in order to support their child’s development, due to their concerns about the negative effect that lockdown, and the associated lack of social interaction, may have had on the social and emotional development of their child(ren). Alongside this, local authority representatives and other stakeholders noted that the continued and consistent take up of the Offer was mainly driven by the needs of working parents to access childcare provision to enable them to work – even if they were working from home.
- 3.7 Although take up of the Offer between September 2020 and August 2021 was consistent with previous years, it is less certain whether the take-up of all formal childcare across Wales during this period also remained comparable with previous years. Many, but not all, local authority representatives noted a noticeable fall in the overall take up of formal childcare during this period, which they believed could be partly due to parents actively choosing to use more informal childcare alongside formal childcare arrangements in order to maintain a ‘back up’ option to limit any disruptions to their overall childcare arrangements that may result from settings having to temporarily close because of COVID-19.
- 3.8 Other local authority representatives referred to ‘shifts’ in the type of childcare provision accessed by many parents during this period – mainly as a result of

COVID-19. These shifts included some parents who had previously accessed provision from two or more settings changing to access all their provision from just one setting. Some parents chose to do this to limit their child's contact with other children and therefore limit their potential exposure to COVID-19. Other parents did not have any other choice during this period because some settings, such as after school clubs and some sessional groups, closed for periods of time due to COVID-19 while other settings remained open. As a result, some of these parents could only access provision from one setting – at least for a time.

- 3.9 Some parents and providers also noted changes in the type of childcare being accessed through the Offer in the period following September 2020. These included examples of children of critical workers who had already been accessing formal childcare prior to the pandemic. Some of these children had to attend a different setting during the spring / summer of 2020 in order to access C-CAS funded childcare. Some of these children who became eligible for the Offer in September 2020 after C-CAS had ceased, remained with the new provider instead of returning to their original setting. This was either because the family preferred the new setting or because the parents wanted to make sure that they could access provision from a provider that would be likely to remain open in the event of another lockdown.
- 3.10 These shifts in the take-up of provision did not necessarily lead to a reduction in the total number of hours of formal childcare accessed. However, in many cases, it resulted in an increase in the hours of provision taken up at day nurseries and a reduction in the hours taken up at sessional childcare settings.
- 3.11 This is further supported in the findings gathered from the providers' survey. Although over half of the survey respondents (55 per cent) had seen no change in the take-up of provision at their setting during year 4, over a quarter reported that they had seen an increase in demand for places, with the remaining 18 per cent noting a fall in demand. In addition, providers who noted that take-up of places had remained constant or had increased were mainly full day childcare settings, whereas those who reported a fall in demand were largely sessional settings and out of school clubs. These shifts in the take-up of provision have had potential consequences on the sustainability of some settings across the childcare sector – see sections 4.20 – 4.25 below.

Processing parent applications for the Offer

3.12 Applications for the Offer were reopened in August 2020 after being suspended from March the same year. Applications for children who had been eligible for the Offer from the Summer term of 2020 were processed during the last two weeks in August. Then applications relating to children eligible for the Offer from September 1st, 2020, needed to be processed during the first two weeks in September. As a result, delivery local authorities had to process applications from 2 cohorts of parents within the same time frame that in previous years they had to process applications from just one cohort. Processing large volumes of applications within this time frame was challenging. However, most delivery authorities noted that they successfully processed applications within a shorter timescale than they had initially anticipated, often as a result of drafting in additional members of staff to deal with the anticipated workload spike. Nevertheless, there were some delays, and instances of parents not able to access funded childcare from the date they were entitled to it. There were delays also incurred by some parents who had difficulties producing the required evidence documentation, however, these were in the minority of cases.

Temporary relaxation of income eligibility criteria

- 3.13 The Welsh Government decided, before applications for the Offer were reopened in August 2020, that if a parent had fallen out of the income eligibility criteria as a result of COVID-19, they could continue to receive the Offer until such time as UK Government employment support schemes for employed and self-employed people stopped.⁹ They would however need to evidence that their earnings met the income eligibility criteria for the Offer before the start of the pandemic and that their temporary reduction or increase in income was a result of COVID-19.
- 3.14 No major issues were raised by delivery local authorities or parents relating to the temporary relaxation of the income eligibility criteria. Some delivery local authorities noted that checking through the furlough status of some parents did add a few additional challenges to the eligibility checking process. These local authorities also noted that re-checking these at some point in the new year (2022), now that the

⁹ i.e. fallen out of eligibility because their income had fallen below the 16 hours equivalent at the applicable minimum wage or gone above £100k gross temporarily because they are a critical worker.

furlough scheme has come to an end, is likely to create additional resource challenges at that point.

- 3.15 Delivery authorities continued to highlight some ongoing challenges relating to checking the eligibility of some parents including self-employed individuals. This has been an ongoing challenge throughout the delivery of the Offer. The ability of local authorities to check the eligibility of self-employed workers and business owners has improved in recent years following HMRC training provided by the Welsh Government in early 2020. However, during the 4th year of the Offer, local authorities noted some examples that posed particular eligibility checking challenges, including new businesses that had started during or just prior to the first lock down, and therefore had not yet generated any or sufficient income as a result of COVID-19, to be eligible for the Offer – see parent example A in chapter 5 below. Examples were also offered of some parents on zero-hour contracts who were not working 16 hours a week due to COVID-19 but were not eligible for furlough either and therefore had no proof of being eligible even within the temporary relaxation of criteria introduced in September 2020.
- 3.16 Local authorities noted that they continue to receive calls from parents who are eligible for the Offer and also in receipt of Tax-Free childcare or childcare supported provided through Universal Credit.¹⁰ However, if these parents access certain other childcare support benefits or support schemes, they would not be eligible for the Offer and their query is whether they will be financially better or worse off if they access the Offer instead. The extent to which these parents will be better or worse off by accessing the Offer varies according to the circumstances of each parent and it is not possible therefore, to provide general advice that applies equally to all parents. Members of the Childcare Offer team within local authorities are not equipped with the specialist knowledge to provide tailored advice to individual queries of this nature. Neither do they have the time and resources required to address them. In most cases delivery local authorities direct parents who have these queries to appropriate government websites where parents can access the

¹⁰ Working parents who are eligible for Universal Credit support (and also meet some additional conditions) can receive help with the costs of childcare and may be able to claim up to 85 per cent of their childcare costs. Working parents who are eligible for the Tax-free Childcare government scheme, can claim back 20% of their childcare costs - up to a maximum of £2000 each year.

advice they require. One delivery authority noted that they ask parents within the initial application process whether they are in receipt of any of these childcare support schemes and suggest that if they are, to seek further advice before proceeding any further with the application process.

Communication with parents and providers

- 3.17 Delivery and engagement local authorities noted that opportunities to engage directly with parents and providers to raise awareness of, and provide information directly related to the Offer have been limited due to COVID-19. However, this has prompted some local authorities to increase, or review and improve the information available online through their websites. The Welsh Government also provides information to parents on its website and contracted a communications agency to lead a national campaign, including TV and radio advertising.¹¹
- 3.18 Findings indicate that general awareness of the Offer amongst parents has remained high, hence the consistent take-up numbers recorded during year 4 - see paragraph 3.3 above. However, findings also indicate that although many parents appear to be aware of the Offer, their understanding of what it is, is not always as high. The findings also indicate that parents' level of understanding of what the Offer entails may even have fallen during 2020 and 2021 compared to previous years. The specific points that many parents continue to be unclear about include the eligibility criteria, the split between childcare and FPN hours and the availability of funded provision during school holidays (this is explained further from the perspective of providers in paragraphs 4.4 and 4.5 and from the perspective of parents in paragraph 5.5 and 5.6).

COVID-19 specific issues

- 3.19 COVID-19 created challenges for many parents and children in relation to their ability to access both the FPN and childcare element of the Offer. In cases where children were accessing childcare from one provider and FPN from another provider, located in a different setting, accessing both FPN and funded childcare was a particular challenge during the latter part of 2020 and early 2021. In cases where children were accessing FPN delivered in school settings this provision was

¹¹ [Childcare Offer for Wales | Help With Childcare Costs Wales | GOV.WALES](#)

simply not available during periods when schools were closed even though most childcare providers remained open. During these periods, children supported by funded childcare could only access up to 20 of the 30 hours they were eligible for each week. Even when school-based FPN was available, some providers suspended their provision of transport services to and from their settings or limited the settings they would pick up from and drop off to, in order to maintain social distancing bubbles. As a result, many parents could only access funded childcare or FPN – but not both. This placed a temporary limit on parental choice and access to all the funded provision available to them.

- 3.20 One local authority referred to a case where a group of childcare providers got together during 2020 to announce that they would not allow children in their care if they also accessed FPN from the local school where they would be mixing with a lot of other children and therefore increasing the risk of catching and spreading COVID-19. As a result, many parents withdrew their children from maintained FPN provision to ensure they could continue to access childcare from these providers. These children therefore missed out on the FPN provision they were entitled to during this time, even though the provision was available for them. In addition, many of the parents had to pay for the additional hours of childcare they required to cover the hours that their child would otherwise have spent within the FPN setting.

ALN and child development during COVID-19

- 3.21 When asked whether their child required additional support or have any additional learning needs, just under 4.5 per cent (90 of the 2053 respondents) answered yes. The majority of these parents (79 per cent of them) reported that their childcare provider was able to give the support that their child needed. A small number however--18 parents answering the survey--answered that the childcare provider was unable to provide the support, and the reason usually given was that there wasn't the one-to-one support available at the childcare. The proportion of parents reporting that their child requires additional support and those receiving that support is broadly similar to the survey responses of parents accessing the Offer in 2019/20, although the numbers are too small to draw accurate comparisons across years.
- 3.22 Many local authority representatives, parents and childcare providers noted concerns that the isolation of families during COVID-19 lockdowns may have had a

negative impact on the development of many children, including speech and language as well as general social skills and gross motor skills. Some local authorities noted that demand for additional support to help children with delayed development, increased considerably during 2020 – 2021. Although much of this support was directed towards children under the age of 3 who are not yet eligible for the Offer, some local authority representatives and providers were of the view that addressing the impact of COVID-19 on child development could take several years to achieve. Therefore, the additional needs of these children are likely to increase amongst Childcare Offer eligible children in the next year or so even if it has not been the case yet.

- 3.23 Most local authority representatives noted that take-up of the additional grant available through the Offer to support children with ALN, is increasingly being allocated and used to support further provision. Some local authority representatives also noted that they hoped the introduction of the new ALN Code would improve the process of identifying and directing support towards preschool aged children who have ALN, and that this will ensure more effective use of the additional funding available.

Preparing for the new national digital service

- 3.24 A national digital service will replace the current systems in place to deliver the Offer.¹² The current process of the parent applications and provider payments of the Offer being administered by individual delivery local authorities, will be replaced by one single centralised system. With the new national digital service, all parents will use one service and apply for the Offer using the same application process. Childcare providers will move towards working with just one system and one payment schedule, no matter which local authority area the children in their care live in. The new system will be piloted in a few local authority areas (Gwynedd and Ceredigion (Delivery local authorities) and Conwy and Carmarthenshire (Engagement local authorities)) from April/May 2022 with a view to rolling it out across all areas in Wales by January 2023.

¹² Further details on the digital service available here: this site: [Childcare Offer for Wales: National Digital Service | GOV.WALES](#) (Accessed 3rd December 2021)

- 3.25 Generally, local authorities reported that they felt informed and fully involved in the process of moving towards a new digital service and welcomed this. Most local authorities also welcomed the introduction of the new digital service as they expected it to introduce more consistency to the administration and payment processes. They also expected it to increase transparency, especially in terms of parents' ability to track and monitor aspects of the Offer including how much school holiday provision they had left.
- 3.26 However, some local authorities also expressed some concerns that some uncertainty remained in relation to the details of the full rollout and what the role of childcare teams within each authority would be once the new system is in place. A couple of local authorities expressed concerns that staff members within their team were starting to fear that their role within the childcare team would become redundant once the digital service was fully operational, prompting some staff members to consider looking for work elsewhere.

Links with early years provision and parent support programmes

- 3.27 As part of the evaluation fieldwork, the research team reviewed the way and the extent to which the Childcare Offer aligns with other early years provision including FPN and childcare provision delivered through Flying Start. The extent to which the Offer supports or aligns with parent support programmes that offer childcare funding to enable parents to access sustainable employment including Parents Childcare and Employment (PaCE) was also reviewed.

Foundation Phase Nursery (FPN)

- 3.28 FPN is an integral part of the Childcare Offer making up at least 10 of the 30 hours of funded provision available to eligible children. When the Offer was first piloted in 2017, some stakeholders voiced concerns that the funding rate offered by local authorities to providers to deliver FPN was, in many cases lower than the standard £4.50 an hour rate offered to providers for delivering the childcare hours included within the Offer. As a result, many were concerned that some non-maintained providers would reduce or stop delivering FPN in order to focus more of their resources towards delivering childcare. However, from January 2021 the Welsh Government made additional funds available to local authorities to enable them to

increase funding to funded non-maintained settings to help align FPN and childcare funding rates under the Childcare Offer.

- 3.29 This development has been largely met with the approval of providers. Most were of the view that the harmonisation of funding rates would help ensure that FPN provision in funded non-maintained settings continued in the future. However, a minority voiced concerns that the process could displace some provision away from smaller providers towards larger ones.

Flying Start

- 3.30 Flying Start helps families with children under 4 years old in disadvantaged areas of Wales. Part of the Flying Start help available includes part-time childcare for 2- to 3-year-olds. The childcare offered through Flying Start is aimed at younger children than the funded provision available through the Offer. Only a proportion of parents supported through Flying Start would also be eligible for childcare support funded through the Offer. Nevertheless, there are some connections and interdependencies between Flying Start and the Offer that can influence the delivery of, and therefore access to, both.
- 3.31 For example, stakeholders consulted noted that some potential tensions exist within non-maintained settings delivering childcare funded through Flying Start as well as the Childcare Offer. The staffing ratios required to look after younger children (funded through Flying Start) are higher than those required to look after older children through the Childcare Offer. As a result, the cost per child of delivering Flying Start funded childcare is higher than that of delivering the Offer. This, in the view of some stakeholders, could encourage some of these providers to favour the delivery of Offer-funded childcare over Flying Start funded childcare resulting in a fall in the availability of childcare support for some families in disadvantaged areas. These concerns are very similar to those previously noted in relation to FPN provision in non-maintained settings see paragraph 3.21.
- 3.32 However, it should also be noted that there is no data currently available that demonstrates any movement away from Flying Start provision towards provision of the Offer. However, stakeholders were concerned that movement of this nature may be looming on the horizon. Stakeholders also expressed concerns that increases in the funding rate offered to deliver the Offer could lead to expectations of similar if

not greater increases in the funding to deliver Flying Start childcare provision in non-maintained settings, placing additional pressures on local authority finances.

Parents Childcare and Employment (PaCE)

- 3.33 PaCE assists out of work parents into training or employment where childcare is their main barrier to doing so. Through PaCE, out of work parents can access support with childcare up to the point where they gain a job and for their first month in employment. For some of these parents moving from accessing support through PaCE to gaining funded childcare support through the Childcare Offer would appear a natural progression route.
- 3.34 PaCE advisers noted that they were aware of the Offer but did not always feel that they were kept sufficiently informed about the Offer and therefore did not always feel confident that they were providing parents with up-to-date information relating to it. Advisers also noted that in their view, knowledge of the Offer amongst the parents they support was quite low. PaCE advisers also noted that the parents they support don't always consider options beyond the point of getting into work and therefore the Offer is not always an immediate priority for them.
- 3.35 Generally, PaCE advisers reported that they direct parents towards online information relating to the Offer but don't work sufficiently closely with members of the Offer teams across local authorities to enable them to put parents in direct contact with someone who would be able to provide them with the detailed information they need.
- 'Sometimes it [the Childcare Offer] can be unclear to parents. Some parents don't understand the age bracket of children it applies to. Others think it's too good to be true and therefore they're not going to be eligible for it or that accessing it will have a negative impact on other benefits they receive including Universal Credit' (PaCE adviser)
- 3.36 Some PaCE advisers noted that even when the parents they support are aware of the Offer and know they will be eligible for it once they get a job, they don't always pursue it further because they don't know where to start with the application process. One adviser referred to examples where they have been asked by parents to help them complete the application process.

'When it [the Offer] was launched, the regional Childcare Offer team would come in to speak to us and let us know about it – but we haven't had much contact since'. (PaCE adviser)

'Not enough parents know about it, there hasn't been anything on the tv and not enough advertised about the Offer. It's not promoted enough and there needs to be a bigger push for parents to know that the funding is out there for them.' (PaCE adviser)

4. The Offer's influence on providers

The Offer's influence on providers

Key findings

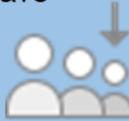
Most providers are now comfortable with **LA online systems**, but some still struggling.



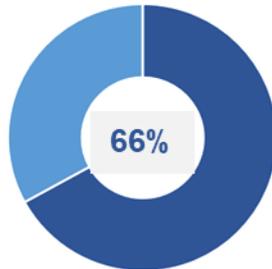
As a result of COVID-19 providers have been carrying out **more outdoor activities**.



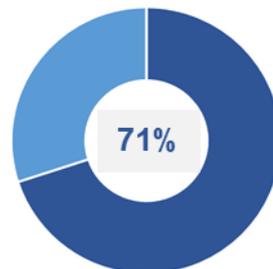
General **staff shortages** within the sector have been exacerbated by COVID-19.



Dealing with parents' various queries regarding the Offer can be time-consuming for providers.



reported improved profitability



reported improved sustainability

Icons by Icons8.com

Source: Childcare Provider Survey 2021. N= 363

4.1 This section presents the evidence gathered primarily through 50 depth interviews held with childcare providers, an online survey of providers (363 respondents); depth interviews with Cwlwm¹³ organisations and the local authority childcare teams. This section begins with outlining providers' experiences of administering and delivering the Offer, their views on engaging with parents and changes due to COVID-19. Next, the particular experiences of Welsh-medium settings is explained. The chapter concludes with a section on the Offer's effect on settings' profitability and sustainability and concerns about the state of the childcare sector.

Profile of providers delivering the Offer

4.2 Any registered childcare provider is eligible to take part in the Childcare Offer and during the 2020/21 period, 2,252 providers took part (around 65% of registered childcare and play settings¹⁴). All those providers registered to deliver the Offer were invited to complete an online survey, and responses to the survey were received from providers in every local authority. Of the 363 providers that responded to the survey, half were childminders (50 per cent), just over a third (34 per cent) were full day-care settings, 14 per cent were sessional day-care and two per cent were out of school childcare.¹⁵

Administering/Delivering the Offer

4.3 Settings were asked how many children they cared for, the average number of children they expect at their setting per day, the total number of children supported through the Offer, and the total number of new children accessing the Offer since September 2020.

¹³ Cwlwm is made up of five organisations that support the childcare sector: Early Years Wales, Clybiau Plant Cymru Kids' Clubs, Mudiad Meithrin, National Day Nurseries Association (NDNA Cymru) and PACEY Cymru.

¹⁴ Based on Care Inspectorate Wales register

¹⁵ Providers could select more than one option in the survey.

Figure 4.1: How many children are cared for at your setting?

	Average	Max
Total number of children using your service	25.7	144
Number of children who use this service on a full-time basis	6.7	119
Number of children who use this service on a part-time basis	19.5	144
Number of children who use the service on an ad-hoc basis	2.5	75
Average number of children using your service per day	16.0	150
Total number of children supported through the Childcare Offer	7.6	80
Total number of children supported through the Childcare Offer who are new customers since September 2020	4.6	86

N = 360

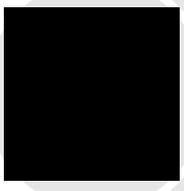
Source: Providers' survey: Providers stating their how many children cared for at their setting

4.4 Settings stated that they provided childcare for an average of 25 children within their setting. The average number of children that were supported through the Childcare Offer was 8 children per setting, with just under 5 new children per setting accessing the Childcare Offer since September 2020.

Administration tasks

4.5 Over half of the surveyed providers reported spending no extra time or less than an hour per month on administration tasks linked to the Childcare Offer. They reported in interviews that taking part in the Offer was mostly straightforward. There were exceptions, and one new provider explained that she found it difficult to register as a setting, found that the local authority's website links didn't reach the application form, and found that the information provided in the local authority's booklet did not match the online reporting form. A small number of providers surveyed and interviewed found the processes of providing monthly returns to be difficult, due to struggling with using the online systems. (See example A below for a description of the experiences of a childminder who struggled with digital access). Local authority interviewees also reported that a very small number of childcare providers still struggled with providing correct returns electronically.

Provider Example A: Digital literacy issues



One childminder explained her fear of IT. She was aged late 50s and was currently caring for two children under the Offer. When the Offer first launched a staff member at the local authority took the monthly return details over the phone each time, but since that staff member left she has been relying on parents. With the two children currently in her care, the parents complete the childminder's monthly returns to the two local authorities. The childminder admits that she is 'scared of spreadsheets' and has some wider anxiety issues, but also that her inability to sort out being able to provide returns electronically has affected her self-esteem. She has tried to use the online form on an old iPad but has been told that it is not compatible. She cannot afford to buy a laptop and explained that she missed out on a grant to buy a laptop because the information and application forms were all online.

When the two children currently in her care start school, she will be retiring from childminding; and cites using computers to provide the returns as a key factor in her decision.

- 4.6 As noted in the evaluations of previous years, the amount, nature and timing of administration tasks required by providers continues to vary depending on which delivery local authority they submit claims to. This is a particular frustration for providers dealing with two or more delivery authorities. These difficulties were made worse during this past year of the Offer according to some providers who explained that they had difficulties getting hold of local authority staff. Whereas before COVID-19 they would usually receive an almost instant reply to a phone or email query, they explained that during the previous year it sometimes took several days. One childcare provider explained that she had not been paid for one child and was still waiting after a few weeks to hear back from the local authority, and that she was aware of three parents 'who are waiting to use the Offer but are yet to hear back if they've registered successfully'.

- 4.7 Dealing with parents' various queries could also be time-consuming for providers. In interviews and in the survey replies, providers explained that parents often do not understand the detail of the Offer and that they as providers are the ones to set out and explain what the parent might be eligible for. The lack of understanding was mainly regarding two issues: childcare hours and holiday hours.
- 4.8 The Offer is available for 9 of the 13 weeks of the school holidays. As in previous years, providers and local authorities reported that there is still confusion among parents as to the use of the Childcare Offer during school holidays, especially regarding the 4 weeks a year which are not covered by the Offer. In the survey comments and interviews, providers report that they take care to explain and remind them—in letters or emails specifying holiday hours, face to face discussions and in newsletter and social media posts—but that some parents still forget, and the August fees come as a shock. (See Provider Example B).
- 4.9 Providers report that many parents do not fully understand the distinction between FPN and childcare, and what that means in terms of applications and in accessing hours at different provision. Providers reported that they take time to explain to parents what hours of childcare they are entitled to and that some parents contacted them expecting that they could be able to receive 30 hours of childcare, and in some cases, had planned their return to work and childcare expenditure on that basis.

Provider Example B: Confusion regarding holiday weeks

One childminder explained that the most common cause of confusion is for parents who start on the Offer in January or later and assume that they will get 9 weeks holiday provision from that date - only to find that it's adjusted and therefore they still have to pay for three weeks of provision. The childminder explains at the start and regularly reminds the parents of the situation and explains that several reminders are needed 'as they don't seem to pick that information up from the start'. The childminder advises parents to pay for one week during each of the holidays to spread the costs out but notes that parents don't usually take this advice. She thinks that one possible solution would be to have a chart or calendar when they apply for the Offer where they can mark out the weeks that are covered and not covered by the Childcare Offer.

Engaging with parents and promoting the Offer

4.10 Almost all providers promoted the Offer to parents. A quarter of the providers surveyed were aware of parents who were potentially eligible for the Offer but who had not taken up the Offer. Providers set out a range of reasons: difficulties (or perceived difficulties) with gathering self-employment evidence, particularly for those newly employed or in family businesses; confusion with the fit with tax credits; having difficulty getting through to local authorities to find out more information; being better off (or perceived to be better off) with childcare funded through universal credit; application process seeming too daunting. A study commissioned by the Welsh Government on parents' childcare arrangements also presents reasons why some eligible families do not access the Childcare Offer¹⁶.

Changes as a result of COVID-19

4.11 Some providers had changed working practices and the way they liaised with parents for a period, for example instigating a 'one setting' policy for parents; not providing transition visits before starting at the setting; reducing the number of

¹⁶ [Parent beliefs, behaviours and barriers: childcare and early education | GOV.WALES](#)

schools they provided wraparound for; maintaining smaller bubbles of children or asking parents to collect their children outside of the premises.

- 4.12 In their interviews and survey responses several childminders noted that one of the most significant differences in their ways of working in the last year and a half was not being able—or comfortable—to attend playgroups. Some childminders felt that not only were the children missing out on opportunities to socialise, but they as childminders were also missing out too. As one childminder explains, ‘it feels a bit more isolated and lonely’. Most settings, however, reported that they had returned to near ‘normal’ by the end of the evaluation period (August 2021). Another theme in the comments by providers, local authorities and stakeholder organisations was the concern that children starting funded childcare during this year often needed more support, were sometimes behind developmentally compared to children starting childcare in previous years and were more likely to have issues with attachment and socialising.
- 4.13 Across all settings, several respondents pointed to increasing their time outdoors and carrying out more outdoor activities as being a positive change. Several respondents explained that they had received small capital grants to enable them to improve their outside spaces, such as buying outdoor play equipment, improving decking or installing a garden cabin or canopy, which was very welcome.

Welsh-medium provision

- 4.14 Settings were asked what the main language through which their service is provided at their setting. Of the 363 settings that responded, nearly half (45 per cent) were English-medium settings with some bilingual elements, nearly two thirds (32 per cent) were English-medium settings, 16 per cent were Welsh-medium settings (58 settings), and seven per cent reported they were bilingual settings, where Welsh and English was used side-by-side.
- 4.15 Of the 58 surveyed providers who described themselves as a Welsh-medium setting the largest proportion (25 out of the 58) were full day care; 19 were sessional day-care settings (usually Cylchoedd Meithrin) and 13 were childminders: this is a far smaller proportion of childminders than responded to the survey as a whole. Over a third (22 of the 58) of the Welsh-medium settings in the survey were based in Gwynedd.

- 4.16 The Welsh-medium providers' survey responses were broadly in line with the responses as a whole. There were small differences: they were more likely to report that the Childcare Offer is having a positive effect on sustainability and profitability; were somewhat more likely to report that the current rate of £4.50 is financially viable and were more likely to have temporarily closed due to COVID-19.
- 4.17 In interviews, the Welsh-medium settings—and local authorities and Mudiad Meithrin—reported that recruiting and retaining Welsh-speaking staff was an increasing challenge which had already led to occasional examples of settings having to close. Although the majority of parents surveyed who wanted Welsh-medium provision were able to access it (see paragraphs 5.17-5.18), there are concerns that more settings will have to close in the future, which will ultimately affect childcare supply and parental choice:

'We've generally seen an increase in demand of places, parents are aware of the Welsh-medium childcare due to us being a 'cylch' and on the mudiad websites. There's more demand now; parents appreciate their children learning a new language. More recently, there's not enough provision in this area, and if we close, then the main Welsh medium childcare would close down.' (Provider interview with Cylch Meithrin/Sessional day care)

Effect on profitability and sustainability

- 4.18 Some 66 per cent of providers reported that the Offer had a strong or some positive effect on their settings profitability. 71 per cent reported that the Offer had a strong or some positive effect on their sustainability (a similar proportion to previous years for both).
- 4.19 Just over two-thirds of providers surveyed (68 per cent) answered that the £4.50 per hour was a viable payment rate for them. This was true of providers across all setting types, and almost all local authority areas, except for two local authority areas (Vale of Glamorgan and Cardiff) where there was a 50/50 split with half reporting the rate as viable, and half that it was not. However, there were calls to increase the rate in providers' survey responses and interviews, even among those providers reporting the rate as viable, and by the local authority and stakeholder representatives. They pointed to increasing costs on providers: COVID-19 related

costs, inflation, increases in National Minimum Wage, heating bills and not being able to carry out any fundraising due to COVID-19.

- 4.20 Providers explained that other factors contributed to the viability of their business, namely the fact that the fees were guaranteed to be paid, and that delivering the Childcare Offer meant that they had been able to access grants which supplemented what they received as fees. Without access to these grants then the £4.50 per hour wouldn't be viable for some providers.

Concerns on the state of the childcare sector

- 4.21 Local authorities, stakeholders and some providers themselves expressed concerns about the current pressures on the childcare sector. It was explained that although most of the sector had come through the pandemic reasonably well financially, this had been largely due to the financial support provided by the Welsh Government. Stakeholders and local authorities believed that the raft of financial support for the sector (continuing payments for Childcare Offer childcare for a period of 3 months back in spring 2020 during Year 3 delivery; the furlough scheme, childcare providers' grants etc) had helped settings stay financially viable and kept settings open but not necessarily sustainable for the future.¹⁷ Many of the providers interviewed and surveyed referred to the financial support as having made a significant difference to the immediate viability of their business.
- 4.22 The impact of COVID-19 on settings has been uneven. Some day nurseries had been open throughout the past eighteen months and are in a relatively strong financial position; some after-school provision were unable to open for a period due to sharing school buildings and were more likely to have seen a drop in demand from parents not wishing to use several settings; and some childminders have made the decision to move to other jobs within and outside of the childcare sector. Changes or shifts in the way some parents accessed childcare during year 4 led to an increase in demand in some settings, mainly day nursery settings and a fall in others - mainly sessional play groups and after school clubs – see also section 3.
- 4.23 There are serious concerns about staffing issues across all types of settings, which may affect the Offer in the short and medium-term. Stakeholders and local

¹⁷ [Written Statement: Childcare Providers Grant \(12 August 2020\) | GOV.WALES](#) (Accessed 3rd December 2021)

authorities pointed to examples of settings which had closed temporarily or permanently due to staff shortages leading to localised gaps in childcare availability. There are concerns that more staff may look to leave the sector over the coming months and years. In interviews and survey responses some settings reported not being able to fill vacancies; not being able to backfill positions when staff were absent due to shielding, or sick with COVID-19 or other illnesses and not being able to recruit 1:1 support for children. A small number of examples were shared of settings which had to close part of their provision due to staff shortages or had reduced the number of places for younger children. However, no parents reported being unable to source childcare in this period.

- 4.24 Concerns were expressed by local authority and stakeholder representatives that these staffing issues may worsen, and that more childcare workers will choose to leave the sector. They explained that this might affect the supply of Childcare Offer places in the near future and affect wider childcare provision as settings could choose to prioritise maintaining places for Childcare Offer-funded 3-4 years-olds at the expense of places for younger children due to guaranteed funding and a more favourable staffing ratio for the 3–4-year-olds.
- 4.25 While challenges in recruiting and retaining staff have been raised in previous years of the Childcare Offer, they have been exacerbated by the pandemic. The survey asked providers to report on whether COVID-19 had affected their ability to recruit suitably qualified staff: the majority of providers responded that there was no effect or that this was not applicable, but 20 per cent reported a negative effect on ability to recruit and just under 6 per cent reported that there had been a positive effect.
- 4.26 Concerns that staff are tired and feeling unappreciated was a strong theme in the local authority and stakeholder interviews– especially staff in those settings which stayed open throughout the pandemic.

5. Parents experiences and impact of the Offer

Parents' experiences and impact of the Offer

Key findings

Accessing the Offer

93% of those surveyed who wanted to access Welsh-medium childcare through the Offer were able to.

Cymraeg

Over half of parents accessing the Offer* earned below the national average annual full-time salary level (£28,158 per annum).**



88% were using formal childcare before accessing the Offer. Of these, 45% used more hours of formal childcare whilst accessing the Offer.

Impact on parents



73% said the Offer made it easier for them to undertake their work.



53% reported that the Offer had increased their flexibility in the way they worked.



30% would be working fewer hours had the Offer not been available to them.



46% said the Offer had given them the potential to increase their earnings.

Icons by Icons8.com

*Source: Childcare Offer for Wales termly monitoring data returns

** StatsWales, Average (median) gross weekly earnings by UK country -English region and year
Childcare Offer 21 Parent Survey. N= 2108.

5.1 This section presents the evidence gathered primarily through an online survey of parents who have accessed the Offer (2,108 respondents) and follow-up depth interviews with 30 of these parents. This section begins with outlining the profile of parents who responded to the survey and the salary profile of parents who had accessed the Offer. It then discusses parents' general awareness of the Offer, their views on the application process, their understanding of the Offer entitlement and the process of confirming their eligibility. Next, how parents have used the Offer is discussed, with a particular focus on how parents have gone from accessing informal childcare prior to accessing the Offer to using more formal childcare and parents use of Welsh-medium provision funded by the Offer. Finally, the impact of the Offer on parents' employment and family well-being is considered.

Profile of surveyed parents

5.2 Of the 2,108 parents who responded to the survey, most (88 per cent) were previously using formal childcare before accessing the Offer. As part of the Offer, most respondents (56 per cent) used full day care, 28 per cent sessional day care, 14 per cent out of school and 12 per cent childminders.

Salary profile of parents accessing the Offer

5.3 Data on the salary bands of parents accessing the Offer is collected from the termly monitoring data that all local authorities return to Welsh Government. Table 5.1 presents the salary bands of parents at the point of applying for the Offer between September 2020 and August 2021.

5.4 Analysis of this data reveals that the median annual gross salary band of individuals accessing the Offer between September 2020 and August 2021 was £20,800 - £25,999. This is lower than the national average full-time salary of £28,158 per annum in 2020, recorded by the Annual Survey of Hours and Earnings (Office of National Statistics).¹⁸ It is also consistent with the previous three years evaluations, suggesting that the salary profiles of parents accessing the Offer have remained the same since the introduction of the Offer in September 2017.

5.5 Table 5.1 shows that over half (at least 55 per cent) of parents accessing the Offer earned below the national average annual salary level for full-time workers.

¹⁸ Stats Wales [Average \(median\) gross weekly earnings by UK country - English region and year \(£\) \(gov.wales\)](https://gov.wales) October 2021 [Accessed on 3rd December 2021]

Furthermore, just over a quarter (27 per cent) of parents earned less than £15,600. Conversely, only a minority (6 per cent) earned £52,000 or above. This is similar to the previous three-year evaluations. It indicates that parents accessing the Offer have tended to be those whose salary falls within the medium to low-income groups.

Table 5.1: Proportion of participating parents in each annual gross salary band at the point of applying for the Offer between September 2020 and August 2021

Annual gross salary bands	Proportion of parents accessing the Offer (%)
Up to £5,199	2
£5,200-£10,399	11
£10,400-£15,599	14
£15,600-£20,799	13
£20,800-£25,999	15
£26,000-£31,199	12
£31,200-£36,399	10
£36,400-£51,999	17
£52,000 and above	6

N=34,195

Source: Survey of providers delivering the Offer

Parents' general awareness of the Offer

5.6 As noted in section 2, there was a consensus among providers and local authorities that parents' awareness of the Offer has improved in the last few years. Despite local authorities being unable to carry out face to face events to promote the Offer over the past year or so due to COVID-19 restrictions, it was noted there is generally good awareness of the Offer. The majority of parents surveyed (75 per cent) were already aware of the Offer before they were eligible. This could be attributed to the fact that the Offer has been available for a few years now and that some parents would have used the Offer previously for an older child. However, as the previous evaluations found, often parents were already using formal childcare prior to accessing the Offer (88 per cent of those surveyed) and they were told about the Offer by their childcare provider (53 per cent of those surveyed). However, interviews with Parent Childcare and Employment (PaCE) advisers suggested that awareness of the Offer amongst those not in work, and to whom childcare is a barrier to entering work, is low. This suggests that, although

awareness might be high amongst parents already in work and already using formal childcare prior to accessing the Offer, awareness amongst unemployed parents is low.

Application process

5.7 The large majority of parents surveyed (80 per cent) were of the opinion that it was easy to apply for the Offer. Of those who said they found the process difficult, just under half noted that it was either time consuming to complete the application (49 per cent) or they found it difficult to provide the required accompanying documentation as proof of eligibility (45 per cent). Comments provided by survey respondents and interviews with parents revealed that those who found it difficult to provide the required accompanying documentation when applying for the Offer tended to be those parents who were self-employed. Similar to the challenges raised in the previous evaluations, these parents have found it difficult to provide proof of earnings, with one parent responding to the survey noting that *'the documentation required is not something we ordinarily need so didn't have them'* and another noting that *'finding the accompanying documentation took a while and required the help of my accountant'*. One parent interviewed, detailed in parent example A, explained that because they had only just set up their business prior to applying for the Offer, they were unable to provide proof of income and so could not demonstrate their eligibility for the Offer. These added complications for self-employed parents means applying for the Offer is more effort and more time consuming. Moreover, as noted in section 4, these difficulties (or perceived difficulties) with gathering self-employment evidence can sometimes lead to eligible parents not taking up the Offer.



Parent example A: Self-employed issues with providing proof of income

Parent A noted that although the application process for the Offer was quite straight forward - providing evidence to demonstrate eligibility in their case was not. They had purposely timed the start of their new business to coincide with when their daughter becoming eligible for the Offer. Generating an income from a new business start-up during COVID-19 was difficult, however, they were of the view that registering a new business would be enough to be eligible for the Offer but it did not appear to be the case. “I even had a letter from the accountant confirming that it was a legitimate business, but the local authority said that was not enough and that I needed to demonstrate that I was drawing an income from the business. Without generating an income, it was difficult to demonstrate eligibility for the Offer and without the Offer it was difficult to get things started with the business in order to generate an income - Catch 22”.

- 5.8 Despite the ongoing issues with applying for the Offer discussed above, in terms of the language parents are able to complete their application in, almost all were happy with this – 99 per cent of survey respondents indicated that they had been able to complete the whole application process in their language of choice, including both those who favoured completing the process in English and those who preferred to do so in Welsh.

Entitlement (including school holidays)

- 5.9 Survey responses and interviews showed that many parents remain confused about what the Offer covers in terms of childcare hours and FPN. Interviewed parents described spending a lot of time trying to research and work out what they were entitled to, where and when. They requested simpler information, that is easier to find, and with exact FPN and Childcare Offer application and start dates set out clearly. A particular issue of confusion was the balance of hours between childcare

and FPN (and a mistaken belief when planning childcare that they would have 30 hours childcare); when exactly their child would be eligible for both childcare and FPN; and when to apply for both schemes.

'I didn't realise there were two parts of the Offer (FPN and Childcare). I used up all my 30 hours with the Cylch and paid for any additional wrap around - I could have used the Offer to pay for the more expensive wrap around had I realised.'

- 5.10 Around one third of parents surveyed noted that, when applying for the Offer, it was not clear what childcare provision was covered by the Offer during school holidays. As in previous years, there were cases mentioned during both the provider and parent interviews where parents had not understood that the Offer did not cover a full year and were caught by surprise when they had to pay fees in the August summer holidays.

'We always pay in advance, and had paid August in advance. Then during August and out of the blue we had a bill for £500... Had we known we could have set aside some money every month.'

Confirming eligibility

- 5.11 Random eligibility 'spot checks' are carried out whereby, whilst accessing the Offer, parents are periodically asked by their local authority to confirm that they are still eligible for the Offer. 59 per cent of those parents who responded to the survey had been asked to provide documentation to confirm their eligibility. Of these parents, almost all (87 per cent) believed that confirming their eligibility was straightforward, some (13 per cent) noted experiencing challenges in doing this. These parents explained that it was time consuming – *'Gathering paperwork in suitable format to upload was fiddly and time consuming'* – some had been asked multiple times. There was miscommunication, with emails from their local authority being missed or going into their junk email folder, as well as email responses not being picked up by the local authority. In a very small number of cases these issues led to parents not being able to access the Offer until they were resolved, with one parent explaining that they could not access the Offer for at least a month. However, these were the minority of cases. For most parents, there was little interruption in receiving the Offer.

5.12 As a result of COVID-19, a small number of parents who responded to the survey (8 per cent) indicated that their weekly working hours either temporarily fell below the 16 hours eligibility criteria for the Offer or temporarily increased above the £100,000 threshold. Of these parents just under half (42 per cent) who were required to inform their local authority felt that this was a straightforward process. However, a small number (8 per cent) who were required to inform their local authority found this process difficult. One parent explained that they had to send multiple documents, which was very time consuming and a 'hassle'.

Move from informal to formal childcare

5.13 The vast majority of parents surveyed were using formal childcare before they began accessing the Offer (88 per cent). This is slightly lower than the previous years' evaluation of the Offer (year 3: 93 per cent; year 2: 89 per cent; and year 1: 94 per cent). This suggests that awareness of the Offer may have started to improve among parents who were not using formal childcare previously. However, it is still the case that most parents who access the Offer were already using childcare prior to accessing the Offer and as noted above, found out about the Offer through their childcare provider.

5.14 Of the parents who were using formal childcare before accessing the Offer, 45 per cent increased the number of hours they were using once they started accessing the Offer. On average, these parents increased their childcare hours by 12 hours. Therefore, although most parents were using formal childcare before accessing the Offer, many were able to increase the hours they used because of the Offer. This also meant that parents were able to reduce the number of hours of informal care (often provided by grandparents or other family members). For those who responded to the survey, the average number of informal care hours used decreased from 11 hours prior to accessing the Offer, to 7 and a half hours while accessing the Offer.

5.15 In the absence of the Offer, just over two fifths (44 per cent) of parents who responded to the survey indicated that they would be using the same number of hours of formal childcare. However, a further quarter (28 per cent) indicated that they would have used fewer hours of formal childcare without the Offer and some (11 per cent) would not have used childcare at all. Those parents who earned a

higher income (£36,400 and above) relative to the national average in 2020 (£28,158 per annum) or fairly similar to the national average (between £20,800 and £36,399) tended to be of the opinion that, without the Offer, they would be using the same number of hours of formal childcare (58 per cent and 47 per cent respectively) rather than using fewer hours (24 per cent and 26 per cent respectively) or no hours (4 per cent and 10 per cent respectively). However, those parents who earned a lower income (up to £20,799) compared with the national average tended to be of the opinion that, without the Offer, they would be using less hours of formal childcare (34 per cent), as opposed to the same number of hours (32 per cent), and 16 per cent noted they would not use any informal childcare.

- 5.16 Additional comments provided by survey respondents suggest that parents on a higher income believed they had no choice to use childcare whether the Offer was available to them or not because they were working fulltime. However, parents on a lower income tended to explain that they would not have been able to afford childcare if the Offer was not available and so they would either have to rely on relatives or friends to provide informal childcare or they would have to work less hours or even stop working completely. These points are further discussed in the 'Impact of the Offer on parents' employment' section later on in this report.

Welsh-medium provision funded by the Offer

- 5.17 Where the language of the setting has been noted in the termly monitoring data, on average, 21 per cent of children supported by the Offer accessed Welsh-medium childcare provision between September 2020 and August 2021. However, caution is required when interpreting this figure as the information of setting language was only available for around three quarters (77 per cent) of children.
- 5.18 Overall, parents' survey responses suggest that most of those parents who wanted to access Welsh-medium childcare provision were able to do so (93 per cent). A small number (7 per cent) wanted to access Welsh-medium provision but were not able to do so. Reasons for not being able to access Welsh-medium provision were either there was no local Welsh-medium provision; the local provision was full; or that their local Welsh-medium setting (often the *cylch meithrin*) did not offer the full hours parents required and so their child would have had to attend another setting as well, the logistics of which meant this was not an option for these parents.

However, these were the small minority of cases and overall access to Welsh-medium provision for the vast majority of those who wanted to use it was sufficient.

Impact of the Offer on parents' employment

5.19 The evaluation aimed to understand the extent to which the Offer made a difference to parents' employment opportunities through reducing childcare costs as a barrier to employment. Just over half of parents surveyed (58 per cent) were of the opinion that had the Offer not been available to them, their employment situation would be the same or very similar. Generally, these parents noted that they would either have just paid for childcare themselves or would rely on relatives or friends to help look after their child whilst they were working. The former tended to be the case when parents earned a higher income which meant they were more likely to be able to afford childcare; whereas parents who earned a lower income and were more likely to struggle to afford childcare relied on the latter childcare arrangements.

'My working hours would be similar but I would be relying on relatives for the extra care for my child.'

5.20 However, for other survey respondents, their employment situation may have been different had the Offer not been available to them. These parents tended to be those who were on a lower income. For example, nearly a third of all respondents (30 per cent) believed that they would be working fewer hours had the Offer not been available to them; of these respondents, the highest proportion (44 per cent) earned a low income salary (up to £20,799) relative to the national average in 2020 (£28,158 per annum); just over a third (34 per cent) of those who said they would be working more hours earned either just under or just over the national average (between £20,800 and £36,399); and less than a fifth (17 per cent) earned a higher income (£36,400 and above). This suggests that the Offer has made the most difference to the working hours of those on a lower income by enabling them to increase the hours they work.

5.21 Parents who provided qualitative comments to the survey explained how the Offer had been key to enabling them to increase the hours they work. By doing so, this has enabled some parents to accept a new job, opening the doors to better career progression opportunities.

‘Since accessing the Childcare Offer, I have been offered a new job with more hours and better progression opportunities. I now have two children so without this Offer it wouldn’t make sense financially to work more hours but with the Offer I am able to. This has been a massive help in getting me back on track mentally and physically after having children.’

- 5.22 One parent interviewed, detailed in example B, explained how through the Offer increasing their availability to work more hours, they had been able to further develop their career by gaining a promotion.

Parent example B: Securing a promotion and increasing working hours



Parent B was working 16 hours a week on a relatively low wage prior to accessing the Offer. They relied heavily on their grandparent to look after their child whilst they, and their partner, were working as they could not afford to pay for formal childcare: “To be honest, if I was having to pay for childcare, I don’t think I would have got a job.” Then, just after the family became eligible, and started to access the Offer, parent B had the opportunity to apply for a job promotion, which would involve working more hours. With the cost of childcare covered by the Offer, they decided to apply for, and successfully secured the promotion.

“I could apply for the job because I knew then that I had childcare and I wasn’t going to be left with a hefty childcare bill. So without the Offer, I probably wouldn’t have even considered the promotion.”

- 5.23 In addition to work hours, responses to the survey suggest the Offer has had the most impact on enabling parents to increase their income for those who earn a lower income relative to the national average. Overall, only a small percentage of respondents (6 per cent) indicated that they would be working in a job with lower pay if the Offer had not been available to them. However, of these respondents, the highest proportion (44 per cent) were those who earned a low income (up to £20,799), compared with a smaller proportion (22 per cent) who earned a high

income (£36,400 and above). As highlighted above, parents had been able to increase their income by securing a promotion, which was made possible by the Offer increasing their availability to work more hours. Parents qualitative comments to the survey support this finding:

‘Since having this childcare funding, I have been able to take a promotion in work which is increased hours and pay.’

5.24 Despite only a small proportion of survey respondents indicating that they would be working in a job with lower pay if the Offer had not been available as noted above, nearly half of all respondents (46 per cent) said accessing the Offer had given them the potential to increase their earnings. Again, the largest proportion of these parents (41 per cent) were those who earned a lower income. This further supports the finding that the Offer has had the most impact on enabling parents to increase their income for those who earn a lower income relative to the national average.

5.25 Furthermore, although a relatively small proportion of survey respondents (9 per cent) noted they would not be in work if it wasn't for accessing the Offer, the majority of these parents (73 per cent) were those on a low income (up to £20,799). This provides further evidence that the Offer has had the most impact on the employment situation of those on a lower income compared with those on a higher income. Parents qualitative comments to the survey support this finding:

‘Without the 30 hours childcare I would not have returned to employment until my child was in full time school as I would not be able to afford full fees for childcare.’

5.26 One parent interviewed, who reflected that the Offer had enabled them to work, explained: *‘I wanted to have a job because if I was out of work for too long, then I wouldn't be attractive to employers when I started looking for a job later on.’* This illustrates that the Offer can have a lasting impact on parents' employment by enabling them to secure a job earlier and overcome the possible issue of finding it more difficult to secure a job after being out of work for a longer period of time.

5.27 In addition to working hours and income, the evaluation also explored whether the Offer has had an impact on the flexibility in the way parents work and whether it has made it easier for parents to undertake their work. For some parents (53 per cent of those surveyed), the Offer has given them more flexibility in the way they work and made it easier for them to undertake their work (73 per cent of those surveyed).

Parents qualitative comments to the survey explain how the Offer has provided them with more flexibility and helped improve the way they work:

‘Having the Childcare Offer has allowed me to progress within work, be more flexible with my hours and shift patterns and it has massively helped towards childcare.’

‘The funded hours enable me to be more flexible with my time so take on more clients, rather than simply working more hours.’

5.28 The Offer giving parents more flexibility and making it easier for them to undertake their work, was more likely to be reported by those on a lower income (44 per cent and 80 per cent respectively) than parents on a higher income (22 per cent and 66 per cent respectively).

5.29 Several parents interviewed explained how the Offer had made it easier for them to undertake their job by giving them ‘the freedom that the job requires’ – see parent example C below.

Parent example C: Offer made it easier to undertake job



Parent C works within the housing department of a local authority. They explained that although there is little opportunity for promotion within their line of work, the Offer has “made it easier to do my job on the front line”. They further explained that whilst some elements of their role enable them to work from home, giving them flexibility with childcare requirements; other elements of their role involve visiting tenants, which can be more difficult to do with no additional childcare support. They, therefore, explained that having access to the Offer has given “that freedom that my job needs me to do it.”

5.30 Although few parents felt the Offer had improved their opportunities for in-work training (36 per cent), again this was more likely to be reported by parents on a lower income (43 per cent). This further illustrates how the Offer has had more of an impact on the work situation of parents who earn a lower income, relative to the national average, compared with those on a higher income.

5.31 Overall, these findings indicate that the Offer is providing the most support to lower income earning parents, enabling them to remain in employment; increase their working hours and/or earnings; giving them more flexibility in the way they work; and improving their opportunities for in-work training.

Impact of the Offer on family wellbeing

5.32 The evaluation aimed to understand the extent to which the Offer made a difference to families' wellbeing, as well as their financial situation. Almost all surveyed parents agreed, or agreed to an extent, that accessing childcare had a positive effect on their own and/or their partner's wellbeing (88 per cent) and reduced the financial burden of childcare (74 per cent). In interviews, parents explained that the savings had meant that childcare costs were manageable, and that there was less worry associated with managing household finances, including being less likely to go into debt. Furthermore, many parents that responded to the survey noted that they either have much more money (34 per cent) or slightly more money (51 per cent) to spend on things other than childcare each month as a result of accessing the Offer. Examples include spending more money on groceries, extra-curricular clubs for the children, family days out, home improvements, debt payments and savings. Parent example D illustrates a case where a family had gone from relying on food banks, prior to accessing the Offer, to having enough money to pay for extra-curricular activities as a result of money saved on childcare cost through accessing the Offer.



Parent example D: Offer made it easier to work and improved financial situation and well-being

Parent D has tried to return to work since their children were 1 years old, trying to make working while paying for childcare financially worthwhile - but could not. "It seemed as if I was always worse off when I went back to work even with the support of Universal Credit." They wanted to return to work not only to earn more money but also to enable them "space to breathe - to have some freedom to feel like I was contributing to society again." At one point, prior to accessing the Offer, they worked up to 40 hours a week from home with no childcare funding support. However, this was not good for their mental health, their ability to do their job nor the welfare and behavioural development of the children – they saw a deterioration in the wellbeing of their children, with one starting to develop behavioural issues. Then, since accessing the Offer in September 2020, Parent D has been able to work freelance for 30 hours a week. As a result, they are now £500 - £700 a month better off than they were before - both because of increased earning and childcare savings. Whereas before accessing the Offer, the family were struggling financially and having to rely on food banks; now, they are able to afford swimming lessons for the children, plus some other extra-curricular activities. Parent D has also bought a bike so that she can go cycling with the children to make sure they are safe. She can also see a difference that accessing formal childcare has made to the children's well-being.

- 5.33 For most parents that responded to the survey, the Offer has helped to reduce the stress of having to organise care for their child(ren) (85 per cent). This was particularly the case where parents were having to use alternative childcare arrangements, such as relying on relatives or friends to care for their child, whilst they were working.

‘Having 2 full days of childcare free is a relief as it takes the pressure away from organising where he will be every day of the week... It is a big juggling act arranging childcare every day, while keeping costs to a minimum.’

‘It enabled me to reduce the amount of time my parents provided childcare. Previously my mother needed to stay overnight and do 1.5 days of childcare, whereas it allowed my parents to come for the day and not need to stay overnight. This is more of a subtle impact than the financial one but it was very significant for our family and the stress levels.’

5.34 Furthermore, several parents interviewed also explained that the Offer provided a welcomed opportunity to give grandparents more free time. Prior to accessing the Offer, these parents were relying on grandparents to care for their child as they were unable to afford full childcare costs. Having access to the Offer has meant that they were able to use more formal childcare and relieve grandparents of these caring responsibilities.

5.35 Parents also reported positive effects from their child accessing childcare, especially positive effects on their social development through having the opportunity to interact and play with other children at the childcare setting (94 per cent of parents surveyed); as well as a positive effect on their child’s cognitive, including language, development (88 per cent); and behaviour development (87 per cent).

‘My childcare is a routine; it helps me with my day to day working. Relying on family members is difficult and a burden as they’re elderly. Especially with COVID-19, having a regular private nursery setting has meant a structure and routine for my son. Being with the same people and the teaching at his nursery is 5 star. It has given him a great head start to settle in school.’

‘Childcare on my second child has been so much easier and valuable than my first due to this scheme. I always felt guilty working and leaving my first with family who had jobs too or worked less to help us out. My daughter has thrived in her setting, and I’ve loved seeing her progress and develop along-side other children. Knowing that we are not just going to work to pay childcare also has had a positive impact on how I feel actually going to work. I feel like I’m getting

something back and that working is important. She has made so much progress socially and emotionally in her setting.'

5.36 Overall, these findings indicate that the Offer has had a positive impact on families' well-being as it is relieving the stress of organising childcare and reducing the financial burden of childcare costs. Furthermore, by the Offer enabling parents to afford to use informal childcare, parents have been able to ensure their children have structure and routine through regularly attending a formal childcare setting.

6. Conclusions and recommendations

- 6.1 The conclusions and recommendations presented in the following sections draw on the year 4 evaluation findings presented in the main body of this report. The conclusions drawn are also considered alongside the recommendations included in the [Year 3 evaluation report](#), in relation to the extent to which these recommendations have been addressed and / or remain areas that require continued focus.

Delivery of the Childcare Offer during September 2020 and August 2021

- 6.2 The Childcare Offer was reopened to new eligible entrants in September 2020 after applications had been suspended between March and August 2020. Re-opening applications created additional administrative burdens for delivery local authorities during September and the ongoing situation of the pandemic continued to create delivery challenges throughout the year. Despite these challenges, delivery of the Offer during year 4 generally saw a return to business as usual with the take-up of the Offer amongst eligible children being comparable with previous years and providers able to accommodate the demand for places generated by this take-up.
- 6.3 The ability of some children to access both elements of the Offer (FPN and funded childcare) was limited in some cases. This was especially the case when the provision was delivered across two or more settings. In some cases, this was because parents chose not to access provision from more than one setting in order to limit the potential exposure to COVID-19; in others, it was because one or more of the settings were closed for periods of time due to COVID-19. As a result, some children missed out on some of the funded provision available through the Offer.
- 6.4 Year 4 findings indicate that awareness of the Offer amongst eligible parents remains high despite the limitations that COVID-19 placed on local authorities and other stakeholders' ability to directly promote the Offer to parents. Some contributors to the evaluation believed that there still remained parents who were unaware of the Offer. Parents' knowledge of the details relating to how the Offer works, who is eligible for it and what they are entitled to, appears to be relatively low in many cases. Efforts have been made to increase parents' understanding of what they are eligible for during school holidays and parents' understanding of this has

increased in some areas. However, many parents continue to be unclear about this as well as the way the 30 hours is made up of FPN and childcare funded hours.

- 6.5 The Year 3 evaluation report recommended that ‘the Welsh Government may need to further review how they raise parents’ awareness of the Offer and the way in which the two elements of the Offer sit alongside each other. It also included a recommendation that ‘local authorities should continue to provide the additional information already offered to parents and providers relating to school holiday periods.’ These recommendations were echoed in a qualitative study which explored why some eligible families do not access the Childcare Offer¹⁹. The findings from the evaluation of Year 4 indicate that these recommendations remain valid. However, year 4 findings also suggests that awareness and / or understanding of the Offer amongst parents who have not taken up any formal childcare prior to being eligible for the Offer appears to be lower than the level of awareness amongst parents who do. The findings also indicate that other organisations and programmes also working with parents of young children, including out of work parents, are not always sufficiently informed about the Offer to pass on details relating to it, to the parents they support. This may limit the Offer’s ability to encourage and enable some out of work parents to start or return to work.

Recommendation – local authorities may need a renewed focus on raising awareness of the Offer amongst partner organisations operating within their area, including PaCE and Job Centres, and provide them with details relating to the Offer that they can pass on to the parents they support.

Recommendation – the Welsh Government should consider broadening the national communication campaign of the Offer to further promote the Offer and what it entails to reach a wider audience of parents across Wales.

- 6.6 Administration processes implemented by delivery local authorities appear to be well established. Most childcare providers are now very familiar with the information submission process required and receive the payments due within the agreed dates. Some frustrations continue to be reported by some providers regarding

¹⁹ [Parent beliefs, behaviours and barriers: childcare and early education | GOV.WALES](#)

different systems and processes adopted by different local authorities – especially for those who deal with two or more delivery authorities. However, these different delivery systems currently in place will be replaced by one common process when the new national digital service is introduced.

- 6.7 The difficulties sometimes posed by checking the eligibility of self-employed parents and business owners remain, as does the need to signpost parents who also receive childcare support from schemes such as Universal Credit and the Government Tax free childcare towards advice and further guidance. As such, it would appear that local authorities continue to benefit from ongoing support in this area, as set out in the Year 3 report recommendation: ‘the Welsh Government should consider delivering more workshops and / or online tutorials to support local authorities to understand and process complex Offer applications from self-employed parents’.
- 6.8 There remains some confusion amongst parents and providers in relation to the different hours of FPN available, and therefore funded childcare available, in different local authority areas. As such the recommendation included in the year 3 report that ‘in parallel to the ongoing work of developing a national administration system, the Welsh Government should consider further reviewing the options for standardising the number of hours of one or both elements of the Offer,’ remains valid.
- 6.9 The prospect of implementing the new digital service was generally welcomed by stakeholders, and local authorities felt that they had been well informed and included in the whole process. Some local authorities noted that some of their team members were concerned that its introduction could lead to them losing their jobs. Concerns were also expressed relating to the digital literacy levels and access to technology amongst some providers, particularly some childminders. This could affect their ability to access any new digital service and support their parents to do so, although by the time of writing (January 2022) Welsh Government had begun to provide online digital literacy training for providers for this very purpose.²⁰

²⁰ Details here: [Essential Digital Skills for Childcare providers \(gov.wales\)](https://gov.wales/essential-digital-skills-for-childcare-providers).

Recommendation – Welsh Government and local authorities need to consider how best to support digital literacy in the sector to enable them to use and access the systems and processes of the new national digital service. Welsh Government may need to ensure that local authorities have the resources required to deliver support of this nature.

Impact of the Offer on parental employability, wellbeing and disposable income

- 6.10 A core aim of the Childcare Offer for Wales is to ‘remove barriers to secure employment for those parents who want to work or start a business but are currently constrained by childcare pressures.’ During the last 18 months, many parents have had to change their working practices in light of COVID-19, with many working from home, others have not been able to work and have been in receipt of the Government Job Retention Scheme. Opportunities for parents to change jobs, increase working hours and earnings or gain promotions within their current job roles have been limited in many cases during the period under review (September 2020 to August 2021).
- 6.11 Year 4 findings indicate that the Offer has enabled many parents to increase their earnings during this period, especially those within lower income groups. The findings also indicate that the Offer has provided parents more flexibility in the way they work, including those working from home. One in 10 parents surveyed also noted that they would not be in work during this period if it wasn’t for the support provided by the Offer. In all these cases, the highest proportion of those reporting benefits of this nature were those from lower income bands.
- 6.12 The findings outline a few cases where parents had started work or a new business venture as a result of the support provided through the Offer. The opportunities for parents to do this during the period under review was limited to the restrictions imposed by COVID-19. However, some stakeholders questioned the extent to which the Offer creates an incentive for parents to start or return to work even before the outbreak of the pandemic. Some stakeholders were of the view that in order for the Offer to encourage more parents back into work or self-employment, it should be available to younger age groups i.e., under threes as well as three and four-year-olds. The year 3 evaluation included a recommendation that ‘the Welsh Government should consider undertaking further research to review the extent to

which the Offer serves as an incentive or enabler for unemployed parents to access paid employment'. It would appear that this recommendation remains valid alongside the recommendation included above relating to the need to raise awareness of the Offer amongst partner organisations including those that support out-of-work parents.

Recommendation – the Welsh Government might wish to consider undertaking further research into the costs and benefits of extending the Offer's eligibility criteria, in particular to cover younger children.

- 6.13 One of the areas where the Offer has had a significant positive impact during year 4 is the extent to which it has supported the mental health and wellbeing of parents and children across all income groups. Parents, providers, and wider stakeholders referred to the potential detrimental effect that the first lockdown may have had on the wellbeing, as well as the emotional and social development of young children and welcomed the Offer as a means to help address this.
- 6.14 The findings also indicate that the demand for ALN support for young children has also increased during year 4, which in the view of providers and other stakeholders, further reflects the negative influence lockdowns have had on the learning and behavioural development of some children. Some stakeholders were of the view that addressing these effects of lockdown on the development and wellbeing of some children may take a few years and therefore the demand on ALN support services is likely to increase as a consequence.

Recommendation – the Welsh Government will need to ensure that sufficient resources are available to fund potential increases in the demand for ALN support provided through the Offer.

Impact on the childcare sector

- 6.15 COVID-19 has had a considerable effect on the childcare sector in Wales in relation to both its ability to continue to provide childcare services as well as the commercial viability of individual settings. However, its effect and the response of childcare settings to it, has not been consistent across all areas of the sector.
- 6.16 The considerable financial support provided to the sector by the Welsh Government through schemes such as the Childcare providers Grant, has undoubtedly enabled many providers, who would otherwise have permanently closed, to remain in business. However, shifts and changes in the way many parents have accessed formal childcare during year 4 has, in many cases, seen an increase in the demand for provision within some settings, especially day nurseries and a fall in the demand for others including sessional / playgroup settings, after school clubs and childminders. As a result, although the financial viability of the sector as whole currently appears reasonably stable, for some settings the situation moving forward remains precarious.
- 6.17 Year 4 findings indicate that the biggest challenge currently facing the sector is the retention, recruitment, and general morale of the childcare sector workforce. Stakeholders noted that many individuals working in the sector feel undervalued, underappreciated, and underpaid. This has sparked concerns amongst stakeholders that many workers could leave the sector in the very near future which would not only influence the capacity of the sector to supply the childcare provision required, but also influence the type of childcare available. These include concerns that a shortage in staff could encourage some settings to move away from provision of childcare for under threes, which requires relatively high staffing ratios, in favour of provision for three and four-year-olds where required staffing ratios are lower.
- 6.18 The findings also outline further concerns that childcare workers with Welsh language skills could leave the sector at a faster rate than others, as opportunities to gain work elsewhere may be greater amongst individuals who have Welsh language skills. In which case, the sector could experience a more rapid decline in the availability of Welsh language provision in the next year or two.

Recommendation – the Welsh Government, local authorities and other stakeholders including Cwlwm members should consider ways to further celebrate the work of childcare workers in order to raise morale and attempt to stem the outward flow of workers.

Recommendation – the Welsh Government should consider implementing new—and expand existing—employment programmes aimed specifically at encouraging and supporting individuals to work in the childcare sector in Wales.

- 6.19 The year 3 evaluation findings included a recommendation that ‘the Welsh Government should prioritise reviewing the hourly funding rate paid to providers with a view to increasing it from the £4.50 / hour rate at which it was set in 2017’. During year 4 of the Offer, the rate remained at the £4.50 prompting further calls from many providers that the rate should be revised upwards. However, there was also recognition that the Welsh Government has also committed significant financial resources to support individual settings within the sector.
- 6.20 However, during year 4, the funding rate offered to non-maintained settings across Wales, to deliver FPN was matched to the Childcare Offer rate. This was accompanied by a guarantee that in the event of the Childcare Offer rate increasing, the FPN rate will also be increased by the same amount. This has been welcomed by the majority of settings and local authorities; however, it has also prompted some concerns among a small number of local authorities about the affordability of this policy. Some concerns were also expressed in relation to the provision of childcare funded through Flying Start in that increases in funding to deliver the Childcare Offer could either create an incentive for some providers to favour the provision of the Offer over Flying Start childcare, or put financial pressures on local authorities to match any increases offered to deliver the Childcare Offer with equal or greater increases in the funding to deliver Flying Start supported childcare.

Recommendation – the Welsh Government should continue to review the funding rate offered to providers for the delivery of childcare supported by the Offer. However, as part of the review, the Welsh Government should also consider the implications any increase in the funding rate would have on the cost and delivery of other early years provision.

- 6.21 The implementation of the fourth year of the Offer has gone well and has generated much-needed benefits for the families who have taken up the funded childcare. The financial support provided by the Welsh Government to childcare settings has ensured that the sector is currently more financially viable than would otherwise have been the case. Looking ahead there are challenges facing the childcare sector, and therefore delivery of the Childcare Offer, and chief among them is the workforce, and the ability of settings to recruit and retain staff.

Annex A: Interview guides

These topic guides were used when interviewing local authority childcare teams (group discussion and individual interviews), Cwlwm partners, wider stakeholders, childcare providers and parents.

Local authority interview schedule

Role

1. What is your role? What are your main responsibilities with regards to the Childcare Offer?
 - a. How long have you been in your role?
 - b. Have there been changes in how the Childcare Offer is managed and administered in your local authority in the past year?

Childcare Offer take-up/data

2. What has the take-up of the Offer been since September 2020? How does this compare to previous years / to projections? (if projections - what were these projections based on – i.e. did they take into consideration the effects of COVID-19)?
 - a. If different to previous years / projections, what in your view was the reasons for this? (Prompts: parents working from home; parents not wanting to use formal childcare; family members not able to provide informal childcare).
 - b. If similar to previous years / projections, what in your view, were the reasons for this? (prompts: easing of parent eligibility, parents still requiring formal childcare as they return to work or work from home)
3. Do you have data on the take-up of the Foundation Phase for 3-4 year olds? Has there been an increase or decrease in take up compared to previous years?
4. Has COVID changed the way parents use the Offer compared to previous years?
 - a. Prompts: changes to the number of hours of childcare accessed by parents; number of different settings / providers used by parents to access all their childcare and / or FPN or early years education provision?

Delivery

5. How has / does COVID continue to influence how you as a local authority coordinate the way the Offer is delivered since it fully resumed in September 2020?
Prompts (if not already covered) – in relation to engaging with parents:
 - a. (delivery authorities only) Processing new applications for the Offer (during a shorter than usual timeframe in August)
 - b. (delivery authorities only) Reviewing parents' applications, especially in relation to assessing employment and income eligibility as a result of temporary easing of the eligibility criteria?
 - c. the continued process of checking the employment eligibility of all parents (particularly self-employed parents, seasonal workers, contract workers etc) been during this period?
 - o Any challenges / Any examples where process to check the employment eligibility of parents has worked particularly well?
Prompts (if not already covered) – in relation to engaging with providers:

- Processing payments to providers (Prompt – any issues regarding administering payments when settings have had to temporarily close for COVID-related reasons).
 - Other processes – registering new providers, managing returns / claim forms.
6. How have you been disseminating / passing information about the Offer on to parents? Have there been any particularly successful methods / or challenging aspects of communicating to parents about the Offer?
 7. What do you think the impact of COVID has had on children, especially those starting childcare? E.g. impact on their social and educational development?
 - a. Has anything been put in place in setting to try and mitigate any negative effect that COVID may have had on children.

Partnership working

8. For LAs acting as delivery LA for other areas - how has the working relationship between you and the engagement LA(s) you support? - What works well? – What’s challenging?
9. For LAs acting as engagement only LAs - how has the working relationship between you and the delivery LA been? - What works well? – What’s challenging?
10. For LAs supporting the delivery of the Offer to children accessing childcare in a neighbouring LA – were there any administrative challenges associated with this e.g. different start dates or eligibility of childcare hours across LA areas
11. For LAs supporting the delivery of the Offer to children accessing childcare across the border in England - were there any administrative challenges associated with this?
12. For LAs acting as delivery LAs – Did you receive adequate support from the Welsh Government to implement the changes to delivery (i.e. easing eligibility requirements, continued payments to providers in certain circumstances)
 - a. (Prompt – was guidance issued clear and easy to understand, were you able to approach Welsh Government with queries relating to delivery)

Providers’ experiences

13. Has there been any disruptions in childcare provision as a result of COVID-19? (Prompts: settings having to temporarily close due to a COVID outbreak and therefore need to close to undertake a deep clean etc?
 - If so, what has been the outcome of this / reaction of parents etc?
 - (delivery authorities only) What has this entailed in terms of reviewing attendance and administering funding payments to providers who have temporarily had to close for COVID related reasons?
14. Is there sufficient capacity in the setting types that parents want to meet parental demand? (Prompts: childminders, holiday provision, after school clubs)
15. Have any providers noted financial challenges due to providing the childcare offer? How and why?
16. Have any providers noted financial challenges arising from COVID-19 – due to having to temporarily close; reduced take-up or other reason?

17. Are you aware of providers passing on additional costs to (i) childcare offer parents (ii) all parents?
 - a. Are you aware of any providers including any discriminatory charges and top-up fees for children within their setting supported by the childcare offer?

18. Are you aware of children accessing the Offer who require additional support?
 - a. Has the Offer provided any opportunities for these children to access formal childcare and the support they need?
 - b. Could more be done to help remove barriers for those who require additional support?

19. What changes, if any, have you seen in the number of children receiving funding through the Additional Support Grant since September 2020?
 - a. In your opinion, what do you think are the reasons for this (COVID-19 and other factors)?

20. Is there sufficient capacity within settings to offer Welsh medium provision to meet parental demand, at the required type/location/hours?
21. Are all parents (including non-Welsh speaking parents) aware of the Welsh medium provision available to them?

Engaging with parents

22. How aware are parents of their childcare options and the childcare offer, and has this changed in the past year or so?
 - a. Are you aware of any parents who did not take up the offer for any reason?
 - b. What was involved in re-engaging with eligible parents who were previously accessing the Offer following the pause in the Offer as a result of COVID-19?

23. During previous years' evaluation discussion, it was reported that there was some confusion about entitlement to the offer during school holidays. Are parents more aware now, than has been the case in the past, of what they are and are not entitled to in relation to funded childcare during school holidays?

Other Childcare provision

24. What are the links, if any, between the local authority's Childcare Offer team and (i) Flying Start and (ii) Parents, Childcare and Employment (PaCE)?
 - c. How does the childcare offer provide a transition from Flying Start and Parents, Childcare and Employment (PaCE) for working parents?
 - d. Is there anything about the transition between these programmes that works particularly well or less well?

25. Are you aware of any changes in (i) childcare fees (ii) availability for children who are not accessing childcare through the Childcare Offer in the past year or so?

26. Are you aware of any unintended consequences of the Childcare Offer on the childcare sector, particularly on providers that are not involved in delivering the Childcare Offer (e.g. on demand and take up at these settings, fees charged, other)

Harmonising of childcare and FPN funding

27. In January 2021, it was announced that the rate paid for FPN / early education entitlement would start to be aligned with the rate paid for childcare through the Offer (£4.50). Has your local authority introduced this alignment payment yet? if not, when will it be introduced ?
28. What difference, if any has / will the alignment of FPN and Childcare Offer funding rates made to
- the continued provision of FPN at these settings? (Prompt: are providers more likely to continue to deliver / seek to start delivering FPN?)
 - Providers' financial situation?

Current and Future capacity

29. Have any providers permanently closed during the last year?
- If yes – what type of settings?
 - If yes – what was the main reason for this - e.g. COVID-19 or other reasons?
30. Have any new providers started up during the last year?
- If yes what type of settings are these?
31. Generally, has the capacity of childcare provision to deliver the Childcare Offer during 2020/21 increased / decreased or stayed the same? (including changes to settings, hours offered)
- Is there sufficient capacity to deliver the Offer?
 - (If not covered in 12 & 13) Is there sufficient capacity to (i) provide for children who require additional support and (ii) Welsh medium childcare?
32. Based on any feedback you may have received during discussions with parents and or providers do you feel that the childcare provision supported by the Offer is available at locations, and / or during the hours that best suit parents (e.g. is childcare available during parents' varying working hours or patterns, within easy reach of home or place of work, is the availability of wraparound care sufficient to enable parents to access all their childcare / early education entitlement).

Learning points

33. To what extent do you think the Childcare Offer works to achieve the goals of the Wellbeing of Future Generations Act? – are there any particular wellbeing goals that in your opinion the Offer supports?
34. Were there any key learning points relating the co-ordination and delivery of the childcare Offer that emerged during this period?
35. Is there anything else related to delivering the Childcare Offer that we haven't covered that you would like to add?

Local authority group discussion guide

Introductions and welcome to the group discussion (Arad)

To cover,

- a. Individual introductions
- b. Outline the evaluation plan, and the intention to carry out individual interviews with all LAs around September once the delivery of year 4 is complete. As such today's focus will be on general issues rather than the details of individual LAs circumstances.
- c. Confirm receipt of privacy notice.

Take-up of CCO: Opening Question:

1. What has the take-up of the Offer been since September 2020?

Prompts and discussion questions:

2. How does this compare to previous years / to projections?
 - a. Were those projections made taking the effects of COVID-19 into account?
3. How has COVID-19 changed the way parents use the Offer compared to previous years (excluding the period where the Childcare Offer was suspended to new entrants spring and summer 2020)
4. Do you believe parents behaviour had changed as a result of COVID-19 in terms of their use of childcare?
 - a. If yes, what do you think are the reasons behind the change?

Overview of delivery: Opening Question

5. What have been the new (i) challenges and (ii) success factors, if any, in delivering and managing the Childcare Offer in this current academic year?

Prompts and discussion questions:

6. What have been the reasons for the challenges / successes – apart from COVID-19?
7. How has COVID-19 changed the way you as local authorities deliver and manage the Offer compared to previous years?
8. What have been the most challenging (or burdensome) processes for you as local authorities in delivering and managing the Offer?

Processing applications and engaging with parents: Opening Question (Delivery local authorities group only)

9. What have been the new challenges, if any, with regards to processing applications?

Prompts and discussion questions:

Regarding:

- a. Processing new applications for the Offer (during a shorter timeframe than usual in August)
- b. Reviewing parents' applications, especially in relation to assessing employment and income eligibility as a result of temporary easing of the eligibility criteria?

- c. Please explain what the continued process of checking the employment eligibility of all parents has been like during this period? (Prompt: self-employed parents, seasonal workers, contract workers)
- d. Please explain the processes of re-checking eligibility with minimum 20% of parents to re-confirm eligibility.
Facilitator to steer discussion to focus on checking eligibility more broadly rather than eligibility as a result of COVID-19
 - Any examples where the process to check the employment eligibility of parents has worked particularly well?
 - Any challenges?

Processing applications and engaging with providers: Opening Question

10. What have been the new challenges, if any, in relation to engaging with providers?

Prompts and discussion questions:

Regarding:

- a. Processing payments to providers (Prompt – any challenges regarding administering payments when settings/childminders have had to temporarily close for COVID-19 related reasons).
- b. Other processes – registering new providers, managing returns / claim forms.
- c. Dealing with any disruptions or (temporary or permanent) closures in childcare provision as a result of COVID-19 or other reasons?
- d. Any issues regarding the childcare sector's capacity to meet local demand (for example, Welsh Medium provision or supply of particular types of childcare to meet parental demand)?
- e. Any change in the number of children receiving the Additional Support Grant; any changes in how the funding is used?

Processing applications and engaging with parents: Opening Question (Engagement local authorities group only)

11. What have been the new challenges, if any, with regards your responsibilities as an engagement authority?

Prompts and discussion questions:

Regarding, for example:

- a. Accessing data on applications
- b. Partnership working with the Delivery Authority Provider
- c. Any change in the number of children receiving the Additional Support Grant; any changes in how the funding is used?

Harmonising of childcare and FPN funding: Opening Question

12. What difference has the increased FPN funding and harmonisation of FPN and childcare funding rates within the Childcare Offer already made? Do you anticipate further changes?

Prompts and discussion questions:

Regarding:

- c. the continued provision of FPN at these settings? (Prompt: are providers more likely to continue to deliver / seek to start delivering FPN?)
- d. the sustainability of businesses?
- e. Impact of the quality of FPN provision delivered? If so, in what way?

Learning points

13. Were there any key learning points relating to the co-ordination and delivery of the Childcare Offer that emerged during this period?

Evaluation questions

14. Are there any themes or topics you wish Arad to explore during the evaluation?
15. Are there issues or challenges the evaluators should be aware of in planning the fieldwork with parents and providers?

Summarise and close

16. Closing question: Is there anything else you would like to add/say/raise relating to the CCO?

Welsh Government Officials interview schedule

Role

1. What is your role? What are your main responsibilities with regards to the Childcare Offer?
 - a. How long have you been in your role?
 - b. Have there been changes in how the Childcare Offer is managed and administered in your team in the past year?

Update on delivering the Offer

2. Recap: What are the primary policy aims of the Offer?
3. How has / does COVID continue to influence the way you as the Childcare team manage the Offer during Year 4?
4. Please explain how the Childcare Offer is delivered in Year 4, and any changes compared to previous years:

Prompts:

Changes prompted by COVID-19 (for all, confirm what happened when; what—and when—were parents, providers and local authorities told of changes)

- The phased restart to new entrants from summer 2020
- The temporary relaxation of the National Minimum Standards (NMS) for regulated childcare
- Protective measures guidance.
- Easement to the parents' income eligibility for the Childcare Offer.

- Guidance for funding settings, including WG continuing to pay childcare if setting temporarily closed; or child unable to attend due to child or parent shielding.

Update on general delivery

- Progress on developing the national administrative platform
 - The national pay rate of £4.50 per hour, and any reviews.
 - Harmonising the childcare and early education rates.
 - SEN grant (take-up and use)
 - Availability of Welsh-medium places.
5. Are you aware of any issues or challenges **faced by providers** during Year 4?
Prompts: COVID-related changes; broader/non-COVID registration or payment processes; the £4.50 rate.
 6. Are you aware of any issues or challenges **faced by parents** during Year 4?
Prompts: including latest situation on issues from previous evaluations – understanding holiday provision; understanding eligibility; confirming eligibility when self-employed.
 7. Are you aware of any issues or challenges **faced by local authorities** during Year 4?

Childcare Offer take-up/data

8. Across Wales, are you aware of any obvious changes in the take-up of the Offer since September 2020 compared to previous years? [Note to interviewer – touch briefly on this as many of those interviewed will not necessarily know data]

Alignment

9. What are the links, if any, between the Childcare Offer and (i) Flying Start (ii) Parents, Childcare and Employment (PaCE); (iii) ECEC approach (iv) any other relevant scheme?

Learning points

10. Were there any key learning points relating the co-ordination and delivery of the childcare Offer that emerged during this period? In your opinion, has anything worked particularly well?
11. Are there any topics you would wish the evaluators to explore during the evaluation, and in discussions with parents, providers, stakeholders and coordinators of complementary schemes?

Stakeholder interview schedule (i) Cwllwm (ii) Other stakeholders

Interview schedule for Cwllwm stakeholders

Role

1. Please provide a brief overview of your organisation / role.
2. Please provide a brief overview of your involvement and experience of the Childcare Offer to date.

Views on the Offer

3. General views on the Childcare Offer? Prompts:
 - What are the benefits to childcare providers (or your members) / what are the drawbacks to providing the Childcare Offer?
 - What works well / what works less well? For example informing parents, the administration and financing of the Offer.
 - What changes have childcare providers (or your members) made in response to Covid-19 and do you think those changes are likely to remain?
 - Any suggestions for how the Offer could be improved?
4. What are your views on the changes to the delivery of the Childcare Offer from September 2020 until now? And what do you think the impact of these changes were?
Prompts:
Changes prompted by COVID-19
 - The phased restart to new entrants from summer 2020
 - The temporary relaxation of the National Minimum Standards (NMS) for regulated childcare
 - Protective measures guidance.
 - Easement to the parents' income eligibility for the Childcare Offer.
 - Guidance for funding settings, including WG continuing to pay childcare if setting temporarily closed; or child unable to attend due to child or parent shielding.
5. What are your views on the communication and engagement by the Welsh Government and local authorities regarding (i) the Childcare offer generally and (ii) guidance related to COVID-19 and childcare? Prompts:
 - With you as an organisation?
 - With childcare providers / your members?
 - How did this communication and engagement assist stakeholders to support the sector?
6. What are your views on the rate paid for childcare?
Prompts:
 - In the context of potential increased costs and financial pressures as a result of COVID
 - In the context of general rising costs
7. What are your views on the additional investment paid by the Welsh Government from January '21 to help ensure consistent funding rates across early education and childcare?

- a. Have you any observations or comments on how the investment is being administered by local authorities?
8. Are you aware of any issues or challenges **faced by Childcare Offer providers** between September 2020 and now?
Prompts: COVID-related changes; broader/non-COVID issues; registration or payment processes; the £4.50 rate.
9. Are you aware of any issues or challenges **faced by Childcare Offer parents** between September 2020 and now?
Prompts: including latest situation on issues from previous evaluations – understanding holiday provision; understanding eligibility; confirming eligibility when self-employed; top-up fees.
10. Are you aware of any issues or challenges **faced by local authorities delivering the Childcare Offer** between September 2020 and now?
11. Are there any issues which were present in the first few years of implementation or raised in the previous evaluations of the Childcare Offer, that are still issues now? If so, how do you think these could be resolved?

Childcare Offer take-up and supply

12. Across Wales, are you aware of any obvious changes in the take-up of the Offer since September 2020 compared to previous years? [Note to interviewer – touch briefly on this as many of those interviewed will not necessarily know data]
13. Across Wales, are you aware of any obvious changes in the supply of childcare since September 2020 compared to previous years? E.g. Have certain childcare providers had to close, and if so, for what reasons? Prompt: interested in changes both related and unrelated to COVID [interviewer to confirm whether changes identified are COVID related or not]

Learning points

14. Were there any key learning points relating to the co-ordination and delivery of the childcare Offer that emerged during the period from September 2020 until now? In your opinion, has anything worked particularly well?
15. Are there any topics you would wish the evaluators to explore during the evaluation, and in discussions with parents, providers and coordinators of complementary schemes (such as Flying Start, PaCE and Foundation Phase Nursery/early education provision)?

Interview schedule for other stakeholders

Role

1. Please provide a brief overview of your organisation / role.
2. Please provide a brief overview of your involvement and experience of the Childcare Offer to date (prompt, please reflect on any involvement or experience you have, even if you consider this quite minimal).

Alignment

3. How does the Childcare Offer link with and work alongside (i) FPN [note to interviewer prompt with reference to early education and early entitlement if needed] (ii) Flying Start (ii) Parents, Childcare and Employment (PaCE); (iii) DWP (as relevant); please explain.
 - What works well / what works less well?
 - Any suggestions for how the links between the Offer and [the scheme/programme] could be strengthened?
 - What impact has the Offer had on (i) FPN provision and take-up / (ii) Flying Start provision and take-up / (iii) PaCE support, if any?
4. What is the relationship between [the scheme/programme] and (i) the LA Childcare Offer teams (ii) childcare providers?
 - What works well / what works less well?
 - Any suggestions for how these relationships could be strengthened?
5. Are you aware of any issues or challenges faced by parents with regards childcare for their 3-4 year olds? How does [scheme/programme] contribute to addressing those challenges? How is that addressed alongside or in transition from the Childcare Offer?
6. Are you aware of any issues or challenges faced by parents of 3-4 year olds with regards employability and disposable income? How does [scheme/programme] contribute to addressing those challenges? How is that addressed side by side with the Childcare Offer?

Learning points

7. What are your views on the design and implementation of the Childcare Offer?
Prompts:
 - What works well / what works less well?
 - Any suggestions for amending how the Offer is implemented?
8. Were there any key learning points that have emerged during 2020/21 regarding the links between the Childcare Offer and [scheme/programme]?
9. Are there any topics you would wish the evaluators to explore during the evaluation, and in discussions with parents, providers and coordinators of other complementary schemes?

Childcare Providers interview schedule

Background and Context

1. Can you please briefly describe your setting and job role?

Interviewer to confirm:

- Type of setting (Childminder; Full day care; Sessional day care (play group or Cylch Meithrin) Out of School Childcare; Creche, Open Access Play.)
- Number of children registered at your setting (total and number funded under the Offer)
- Opening hours and days
- Languages used (Choose one from: Welsh-medium; Bilingual (where Welsh and English are used side by side); English-medium with some bilingual elements; English-medium).
- Which schemes delivered – Childcare Offer / CCAS / Flying Start / FPN.
- Confirm whether they are still operating

Processes and delivery

2. Can you please talk me through your delivery of childcare, including CCO from September 2020, and compare this to your delivery of childcare provision before the Covid-19 pandemic?

- Are you currently delivering the same childcare services (CCO funded and non CCO funded) as you did before the Covid-19 pandemic? If not, what's changed? Why has this change occurred? Prompts:
 - Are you currently delivering all the childcare services you were delivering before the pandemic – if not what services are you **not** currently delivering – what's the reason for this?
 - Are you currently operating at full capacity – if not at what capacity are you operating – what's the reason for this change?
 - Are your current opening hours different to what they were prior to the pandemic? – if so, please provide details
 - Has the total number of children registered at your setting changed – if so, please provide details
- Turning specifically to your delivery of CCO provision, has the number of children supported by CCO at your setting since September 2020 increased, decreased or stayed the same compared to the number you had in the period before the pandemic? – is there any reason for this in your view?
- Has anything changed in the way you have delivered CCO funded childcare between September 2020 and August 2021 compared to how you delivered CCO funded childcare before the Covid-19 pandemic? e.g.
 - Number of CCO funded children?
 - Number of hours of childcare taken up by CCO funded children / parents?
 - Started or stopped delivering Foundation Phase Nursery/Early education [specify which]
 - Payment and / or other administration arrangements with the local authority?
 - If yes to any of the above – please offer details as to whether these changes have led to:
 - Additional knock-on effects that influence how you deliver the Offer– please provide details.

- Any impacts on children, parents / families - and if so in what way and to what extent?
 - Have these changes had an impact on your business, and if so in what way – e.g. profitability, sustainability – and to what extent?
- If you are a Welsh medium setting (Cylch Meithrin or WM Day nursery) have you noticed a change in demand for WM childcare (more, less about the same) If there is an increase can you meet those needs?
 - Generally, how aware do you think parents are of the Welsh-medium childcare that might be available to them?

During the period September 2020 until August 2021:

3. What has worked well in relation to on-going communication and contact between you and the local authority? What could be improved?

Interviewer to prompt:

- Registering for the Offer as a provider;
 - Payments;
 - Submitting reports
 - Dealing with queries
 - If provider is registered with more than one LA ask interviewee to compare general experience of delivering the CCO to multiple LAs – including different systems, what works well and what doesn't work as well.
4. Is your setting open during any of the school holidays? If yes,
- Do CCO parents continue with childcare during the school holidays?
 - Do CCO parents continue with childcare provision during the 4 non-funded weeks?
 - Do parents understand what childcare provision is covered by the Offer during school holidays?
 - What are the payment arrangements between your setting and your parents for the 4 weeks that are not covered by the Childcare Offer during school holidays?
5. Were there any challenges or issues in delivering the Childcare Offer this year? In particular:
- Communicating with parents regarding eligibility (and any temporary changes in eligibility) and the application process
 - If applicable, parents understanding of what childcare provision is covered by the Offer during school holidays (prompt if not covered by question 4)
 - Providing wraparound and transport to and from other settings – have you had to make any changes to wraparound delivery due to Covid-19
 - ALN/SEN provision, including identifying needs, staffing and funding.
 - Covid-19 related issues - staffing issues, safety measures, isolating
 - Communicating your policy regarding additional or top-up fees/charges to Childcare Offer parents
 - Do parents understand what they need to pay for in addition to what is funded by the Childcare Offer?

- Have you had any queries or discussions with parents who have been confused about the additional charges they need to pay?
6. Are you funded to deliver Foundation Phase/Early Years Education at your setting? If so, how many children access provision and would you like to increase provision?
 7. From January 2021 the funding for Foundation Phase Nursery (FPN)/Early Year Education has started to be aligned with the current funding rate for Childcare Offer childcare (£4.50). Has this change been implemented in your local authority yet? What difference, if any, will the change in funding rate make to your settings likelihood to deliver FPN?

Impact of the Offer

8. Has the Childcare Offer (between September 2020 and August 2021) had an influence on the number of children at your setting? If so, how? Interviewer to prompt:
 - Any new children who came to your setting to access the Childcare Offer? Or have parents left to use other provision to access Childcare Offer funding elsewhere.
 - In your opinion has the Childcare Offer encouraged new children/ families to your setting or would you say that existing children in your service that have turned three are more likely to have accessed the CCO?
 - In your opinion, do you think the opportunity for funded childcare provided through the Offer helped retain children in your setting who you otherwise might have lost if parents needed to pay for provision themselves (especially following changes in financial or employment situations as a result of COVID-19)?
9. What, if anything, has the effect of delivering the Offer had on the profitability and sustainability of your business (between September 2020 and August 2021).
 - a. If it wasn't for the Childcare Offer, in your view would your setting be in a different financial position?
10. What benefits, if any, has delivering the Childcare Offer brought to your setting?

Lessons

11. What advice or comments would you share
 - a. with other providers across Wales that are delivering the Childcare Offer?
 - b. with the Welsh Government and your local authority with regards delivering the Offer?
 - c. How could the Childcare Offer improve for future delivery?
 - d. Do you have any other views of comments you'd like to share with us?

Childcare Offer Parents interview schedule

Background information

1. Confirm / ask details about:
 - Number and ages of all children in the household.
 - Number of children accessing the Childcare Offer.
 - Are these children accessing the childcare and FPN / early years education elements of the Offer? – please provide some detail e.g. childcare and FPN/ early years education; just childcare – childcare alongside some but not all entitlement of the FPN/ early years education

Interviewer to confirm with the parent at this stage what term they use for FPN / early years education

- Number of adults in household.
- Does either parent/guardian still have caring responsibilities (during typical working hours) for
- children and / or other family members? This could influence their ability to increase / change current working arrangements and therefore affect the potential impact that the CCO has on their work / career progression etc

Information and Awareness

2. How did you hear about the Childcare Offer?

Prompt:

- From where / from who did you hear about the Offer, and in what format was the information provided (e.g. online, letter, leaflet, verbally)?
 - Did you receive any guidance or support about eligibility and/or how to apply for the Childcare Offer from:
 - the local authority?
 - a childcare provider?
 - Where do you usually go for information about childcare (e.g. social media, FIS, any websites, friends) and were you able to receive the information you needed about childcare and the Childcare Offer from these sources or not?
 - Generally, how much information was provided to you (from all sources) about the Offer before you applied? Was it detailed enough?
3. When did you gain access to this information?
 - e.g. at the point of applying for the Offer?
 - a few months before applying?
 - more than a year before applying?
 - other? Please provide details where possible
 4. Did you receive the information you needed to apply for the Offer in sufficient time to enable you to make all the necessary childcare / work arrangements you needed?

- e.g. did you have enough time to find your preferred childcare and / or early years education provider?
 - Did you have time to make / change any of your work arrangements?
 - If you had received the information about the Childcare Offer you needed at an earlier stage, would your childcare and / or working arrangements be different to your current ones? If yes, please provide further details.
5. Was the information you received easy to access / find? – please note how easy or difficult.
- Was the information written / communicated clearly?
 - How easy or difficult was it to find the information you needed and understand what the Childcare Offer was providing?
 - very difficult - quite difficult – quite easy – very easy
 - In what language would you have preferred to receive this information (English / Welsh?)
 - Was the guidance and information you accessed available in your preferred language? – yes / no
 - If no what difference did this make?
6. Based on all the information and guidance you received, how clear or unclear were you about all aspects of the Childcare Offer before applying for it?

Prompts e.g.:

- Were you sure that you would be eligible for it?
- Were you clear about how it would match your family / employment needs?
- Were you clear about when your child would first become eligible for the Offer and how long / until what age they'd be eligible for it?
- Were you clear about how many hours a week of childcare were funded by the Offer and how many hours you would have to fund yourself?
- Were you clear about how many weeks of the year were covered by the Offer?
- (If you previously accessed childcare before accessing the Childcare Offer) Were you clear whether your childcare provider was taking part in the Offer?

If you were unclear about any of the above before applying for the Offer – please note whether, and if so where, you found further information that enabled you to gain the understanding you needed?

7. The 30 hours of funded provision included in the Childcare Offer is made up of two types of provision – childcare provision and early years education or Foundation Phase Nursery education provision:
- Were you aware when you applied for the Offer that the 30 hours / week was made up of these two types of provision (Yes / No)
 - If 'No' when did you become aware of this – and how did you find out?
 - Was it clear how many of the 30 hours were made up of FPN / early years education provision and how many hours were available for funded childcare provision? - please provide details

8. Would any additional information about the Childcare Offer have been useful to you before you applied for it? Prompts:
- If yes - what additional information would be useful e.g. what you are entitled to, eligibility criteria, how to apply for the Childcare Offer – anything else? Please provide details
 - How, in your view, should this information be provided to parents – e.g., online, leaflets, TV radio campaigns – other?
 - Are there any elements of the Childcare Offer that are still unclear to you? (details)

Application

9. Can you briefly talk me through your experience of applying for the Offer?
Prompts –
- Was it clear how to apply for the Childcare Offer and what information you needed to provide?
 - How easy or difficult did you find the process of applying for the Offer? – how long did it take to:
 - Access the relevant forms and information
 - Provide evidence of eligibility e.g. pay slips
 - Complete the application forms
10. Childcare provision funded as part of the Childcare Offer is usually available for parents working at least 16 hours a week at the minimum wage and earning less than £100,000 per year. As a result of COVID-19, some parents' weekly hours temporarily fell below 16 hours and some parents' income temporarily increased above the threshold. Did this apply to you between September 2020 and August 2021?
- If yes, did you need to provide evidence of your changed circumstances to the local authority to receive or continue to receive the Childcare Offer, and if so, was this straightforward? - What was the effect of this on your claim?
11. Local authorities periodically ask parents to confirm that they are still eligible for the Offer. Random spot checks are carried out with a sample of parents asked to provide further documents. Were you asked to provide documents to re-confirm your eligibility during the period September 2020 and July 2021?
- If yes, what are your views on this process? E.g. how straightforward was it?
12. Does your child require any additional support to access the Offer such as those related to ALN / SEN? – if no go to Q13
- Did the application process allow you to identify whether your child required additional support to access the Offer - do you feel your ALN / SEN childcare needs were sufficiently considered during the application process?
- Does your child have a formal diagnosis that supports the need for ALN / SEN support / provision? – If not, was it more difficult to identify the additional support requirements needed without a formal diagnosis?
 - Was the additional support required to enable your child to fully access the Offer provided? – please provide some details

13. Could anything about the application process be improved? (please provide details)

Take up of childcare during term time

16. Before you had access to the Childcare Offer, who looked after your child(ren) during school term time?

- Prompt – e.g. parent / guardian, other informal childcare, day nursery, playgroup, childminder, Cylch Meithrin?
- Probe for details on number of days / sessions / hours with each childcare provider, as appropriate.
- Were your children accessing early years education?

17. Now that you're accessing the Offer, who is looking after your child during term time?

- Probe for details on days / sessions / hours in each type of childcare setting, as appropriate.

[Note to interviewer – the aim of the above questions is to see whether the introduction of the Childcare Offer has prompted a change in the type of childcare arrangements used e.g. type of provision including possibly more formal childcare / less informal childcare]

18. At any time between September 2020 and August 2021, has the way your childcare and / or FPN provider operated or delivered childcare services changed as a result of COVID-19 restrictions?

- E.g. does the provider(s) operate staggered start and finish (drop off and pick up) times to limit the number of parents that turn up at the same time
- do they offer shorter / fewer sessions?
- If yes – has this affected your ability work or to get the full childcare sessions you need?

19. Does your child take up all the early years education / FPN provision available through the Offer each week? Please provide details

20. Have any of the changes that may have been introduced as a result of COVID 19 limited your / your child's ability to access FPN / early years education alongside the funded childcare? e.g:

- Has a lack of transport between settings and / or wrap around care during lunchtime / after school limited your child's ability to access both FPN / Early years education and childcare from two different settings?
- If yes – please provide details

21. Do you book (and attend) all the funded childcare hours that are available to you each week through the Offer? Please provide details

22. Do you access more hours of childcare than those funded through the Offer? (if so please provide details)

- How are these additional hours charged / how do you pay for these hours?

23. Are all the childcare costs charged by your current provider(s) covered by the Offer?
- If not - what additional costs do you have to pay? E.g. are there any additional charges that are not covered by the Offer such as wrap around transport, meals / snacks etc? (please provide details);
 - if you were previously using the same provider, did you previously have to pay these additional costs?
 - Do you receive an itemised bill from your childcare provider, which detail these additional charges?
 - Between September 2020 and August 2021, have there been any discrepancies between the sessions you've booked through the Offer and how these have been charged (for instance have you been charged for full sessions/days when you had booked half-day sessions).
24. Were you able to easily access the type and amount of provision that you needed?
- Probe for any difficulties in accessing providers
 - Did you have any guidance or support to access providers e.g. from a provider or LA?
 - Would you have wanted / welcomed additional support to help you find a provider? – if yes, what support would you have required?
 - [note to interviewer: check parents survey response] If your child has a requirement for additional support or any additional learning needs (ALN), are you happy with the additional funded support available?
25. Has the childcare provision available to you been flexible enough to meet your needs?
- Probe for flexibility of hours, wrap around, transfers.
 - Did the provider stipulate specific sessions / days / hours when childcare was available for your child – or were you able to choose your own childcare hours?
 - Were you / are you able to access all the funded childcare provision you need?
 - Were you placed on a waiting list or did the provider have the capacity to accept your child immediately?
26. Does anyone in the home speak Welsh? YES / NO
- Were you given information about Welsh language provision and the benefits of bilingualism so you could make an informed decision about the language medium of childcare?
 - Did you want your child to access Welsh language provision? – If no got to Q 24
If Yes:
 - Did you receive any information from FIS / local authority relating to which childcare settings in your area registered to deliver the Offer, deliver Welsh language provision? – if no would this have been helpful – if yes, was this helpful?
 - Does your current provider(s) offer Welsh language provision?
 - If yes, what Welsh language provision do they provide? E.g., full Welsh language provision; Bilingual provision equal Welsh and English
 - Are you happy with the Welsh language provision available?
 - If no: Is the type of Welsh language provision you'd like to access available elsewhere?
 - If yes: why can't you / don't you access this provision for your child - e.g. prompt
 - the other setting didn't have any spaces available;

- may not be registered to deliver the Offer;
- don't provide any wrap around, transfers,
- aren't open at the times that suit your childcare needs;
- I wasn't given sufficient information to help with my decision;
- no Welsh-medium provision in the area – anything else?

Take up of childcare during school holidays

27. Have you accessed funded childcare through the Offer during school holidays?
- Are you able to access, through the Offer, the type and amount of childcare that you need during the school holidays?
 - Probe for any difficulties in accessing providers
 - Probe for ease or challenges accessing specific provision including Welsh-medium and / or ALN/SEN
28. When applying for the Childcare Offer, was it clear to you what childcare provision was covered by the Offer during school holidays?
- a. If not, what could have made this clearer/been done to avoid confusion around this?
29. Please explain what arrangements (if any) are in place with your provider in relation to funded and unfunded childcare during school holidays – Prompts e.g:
- b. Are you obliged to pay for provision during school holidays even if your child doesn't attend?
- c. Do you pay some additional fees during term time to cover the costs of unfunded childcare during school holidays?
- d. Other – please provide details

Difference the Childcare Offer has made to the family

Interviewer to remind / re-emphasise to parents that all responses will be treated in confidence

30. Do you think that accessing formal childcare has had any positive or negative effects on your child? If so, please explain.
- Prompts: e.g. language development, social skills, behaviour, physical development.

Questions below to be asked in respect of both parents or guardians where applicable.

31. Since September 2020, has there been any change to your (and/or your partner's) employment situation?
- Prompts for the discussion on changes:*
- e. Have you (either of the child's guardians or parents):
- Moved into employment / returned to work
 - Changed jobs
 - Increased your working hours
 - Decreased your working hours
 - Maintained your working hours

- Taken up a new job or role or gained promotion / progression
- Taken up training opportunities you've not been able to before
- Furlough
- Any other changes to your employment situation – please provide details

32. To what extent do you feel that access to the Childcare Offer has influenced any or all the changes referred to above? [note to interviewer - this is a valid question even if their employment situation has stayed the same, as the Offer may have ensured that the parent could continue or maintain their current employment]

33. Has access to the Childcare Offer freed up some of your time, or led to any other changes in circumstance, that may have contributed to any of the following:

- Increased your job satisfaction?
- Increased your job sustainability, including moving out of a zero hours contract?
- Created more work progression / promotion opportunities? (please provide details)
- Improved your working relationships with colleagues, senior managers, staff?
- Enabled you to take on more responsibilities?

34. If none of the above have occurred to date, do you feel the Offer may have an influence on any of them in the near future?

35. Has taking up the Offer influenced your career aspirations for the near future? if so, please provide some details.

36. Has taking up the Offer provided you with more choice in the type of job or career that you have accessed / can access in the near future?

[Ask this question to parents who had been previously accessing formal childcare]

37. Please explain how you paid for childcare before the Childcare Offer e.g –

- paid all the childcare fees yourself;
- All / part of the childcare costs were paid for as part of your Universal Credit payment or tax credits etc)
- I accessed tax free childcare
- how does this compare to the period covered by the Childcare Offer e.g. do you continue to access tax free childcare alongside the Childcare Offer – if so please explain the benefits and challenges of this?

38. What was your annual salary band (combined for both parents or just one if single parent) at the point when you first took up the Offer?

[Note to interviewer - emphasise confidentially and clarify whether the parent is referring to an annual, weekly or monthly salary rate. Convert this response to an annual salary if needed)

- Up to £10,399
- £10,400 to £15,599
- £15,600 to £20,799
- £20,800 to £25,999

- £26,000 to £31,199
- £31,200 to £41,599
- £41,600 to £51,999
- £52,000 to £99,999
- £100,000 or more

39. Since September 2020, has there been any changes to the money you have coming in to your home as income? [emphasise confidentiality anonymity of responses]

Prompts:

- Has your salary increased, decreased or stayed the same since you accessed the Childcare Offer?
- If your salary has increased / decreased, please indicate by how much it has changed each month?
 - Up to £50 / month
 - £51 - £100 / month
 - £101 - £150 / month
 - £151 - £200 / month
 - Other amount – please specify
- to what extent do you think this change in salary has been influenced by being able to access the Offer? (**all of it, some of it, none of it**)
- Repeat question for partner/spouse

40. Since September 2020, has there been any changes to how much money you spend on childcare costs?

[emphasise confidentiality anonymity of responses]

Prompts:

- Have your childcare costs been reduced as a result of the Offer?
 - No – I didn't have any childcare costs prior to the Offer
 - If yes, please offer an indication of how much per month?
 - Up to £100 / month
 - £101 - £200 / month
 - £201 - £250 / month
 - £251 - £300 / month
 - £301 - £360 / month
 - Other amount – please specify
 - [To those parents who access additional childcare hours beyond those funded through the Offer] Has any money you have saved through accessing the Offer enabled you to pay for these additional hours or would you have accessed these hours regardless.

41. Have you and your family benefitted from any money you may have gained from reduced childcare costs and / or any changes to employment income gained as a result of the Offer?

- If so, please provide some examples of the difference this additional money has made to your family e.g. enabled you to:
 - Pay for everyday living costs more easily
 - save more for the future,
 - repay debts,

- enabled me afford the cost of putting another / younger child in a formal childcare setting – if so please provide details
- treat the family etc.
- made no difference

42. To what extent do you feel that accessing the Offer has had an impact on your wellbeing and the wellbeing of your family? Prompt: has accessing the Offer impacted your stress levels related to: the cost of childcare; organising childcare arrangements with friends or family (informal childcare); being able to work more effectively?

Counterfactual

43. If the Offer had not been available,

- what would your childcare or nursery arrangements have been this year (since September 2020)?
- what difference would this have made to your current financial situation / household income? Please provide some examples.

Other comments

44. Is there anything else you would like to mention with regards to your experience of accessing the Childcare Offer? For example, benefits of the Offer that you haven't mentioned or how you think delivery of the Offer could be improved.

Annex B: Surveys

These surveys were used with providers and parents to collect qualitative and quantitative data as part of the evaluation.

Parents Survey

This survey asks your opinion of the Childcare Offer for Wales. Welsh Government has commissioned Arad Research to undertake an evaluation of the fourth year of the Childcare Offer for Wales. We are interested in your views of the childcare received in the period from September 2020 onwards.

The aim of this evaluation is to assess the performance of the Childcare Offer and help Welsh Ministers make decisions about how it is delivered in the future. As part of this evaluation Arad Research will be gathering information through this survey of parents who are accessing the Offer - it will take approximately 10 minutes to complete.

Participating in the evaluation is voluntary. The evidence gathered during the evaluation will be included in a report, and possibly in other publications, by Arad Research and Welsh Government. All information gathered will be reported anonymously. More information about your data and your rights is available in this privacy notice. If you would like further information or if you have any comments about the study, please contact: Sioned Lewis on sioned@arad.wales or 029 2044 0552.

This study is about the Welsh Government-funded early education and childcare offer for eligible working parents of 3 and 4-year-olds in Wales (the Childcare Offer for Wales). Through the Childcare Offer you could receive up to 30 hours a week of early education and funded childcare. The 30 hours is made up of a minimum of 10 hours of early education a week and a maximum of 20 hours a week of childcare. The amount of funded childcare you can receive depends on how much early education your local authority offers.

1. Did you access the Childcare Offer for Wales between September 2020 and July 2021? *

Yes

No

This study is about the Welsh Government-funded early education and childcare for working parents of 3 and 4-year-olds (The Childcare Offer for Wales). You have indicated that you did not access the funded hours of early education and childcare between September 2020

and July 2021. If this is correct, select 'Next Page', otherwise please select 'Previous Page' and amend your answer.

This study is about The Childcare Offer for Wales. As you have indicated that you did not access the funded hours of early education and childcare in 2020/21, this is the end of the survey.

Thank you for your time.

2. In which local authority do you live? *

The remaining questions refer to one child accessing the Childcare Offer. If you had more than one child accessing the Childcare Offer in 2020/21, please answer the questions in relation to only one of those children.

3. Before you began accessing the Childcare Offer, did you use any formal childcare (such as childcare at nurseries, playgroup or childminders)? *

Yes

No

4. Some six months before you accessed the Childcare Offer, approximately how many hours of childcare were you using in a typical week?

Number of formal childcare hours (e.g. hours with registered childminder, day nursery, registered play group etc). Write '0' if no formal childcare was used.

Number of hours cared for by family, friends or extended family - not including yourself or other members of your household (informal childcare hours):

Total hours cared for in a week then:

5. In a typical week during the last school term, so from April to July 2021, how many hours of childcare were you using in a typical week?

Number of formal childcare hours funded by the Offer (up to 20 hours with registered childminder, day nursery, registered play group etc):

Number of formal childcare hours I paid for myself:

Number of hours cared for by family, friends or extended family - not including yourself or other members of your household (informal childcare):

Total hours cared for in a week now:

6. Please complete these sentences:

If the Childcare Offer did not exist my child would have ...

- Attended more hours of formal childcare
- Attended the same number of hours of formal childcare
- Attended fewer hours of formal childcare
- Not attended childcare
- I don't know
- Other (please specify):

7. If the Childcare Offer did not exist my child would have ...

- Spent more hours being cared for by family and friends than if I accessed the Offer
- Spent the same number of hours being cared for by family and friends
- Spent fewer hours being cared for by family and friends
- I don't know
- Other (please specify):

8. In a typical week during the last school term, so from April to July 2021, which of the following best describes the type of childcare provider(s) that your child attended using Childcare Offer funding? Please only include those where at least some or all of the hours were funded through the Childcare Offer.

Unsure what type of provider you use? Click [here](#) and enter your childcare provider's name in the search box.

- Childminder
- Out of school childcare (e.g. breakfast club, after-school club, holiday provision)
- Full day care (e.g., a day nursery, private day care)
- Sessional day care (e.g., Playgroup, Cylch Meithrin)
- Creche
- Open Access Play Provision (e.g. play schemes)
- Other childcare provider (please note type):

9. Did you pay any separate or additional charges with any of the childcare providers that your child attended using Childcare Offer funding? Please include regular charges for lunches, snacks or transport, but please do not include any fees for any additional hours you use.

- Yes, I paid regular, additional charges
- No, I did not pay regular, additional charges
- Don't know

10. If you paid additional charges, please indicate what these were for.

- Meals / Snacks
- Transport
- Registration and administration costs

Top-up fees

Other (please specify):

Now we would like to ask you a few questions about how you began receiving the Childcare Offer for Wales.

11. How did you hear that your child may be eligible for the Childcare Offer?

Current childcare provider

School

Local Authority letter/information leaflet

Family centres (e.g. Flying Start centre)

Employer

Newspaper

Internet/social media

Word of mouth

#TalkChildcare media campaign

Working Wales or other employability support

Other (please specify):

12. Before hearing that you were eligible for the Offer, had you previously heard about the Childcare Offer?

- Yes, was already aware of the Offer
- No, heard about the Offer upon becoming eligible for it.

13. How easy was it to apply for the Childcare Offer?

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult

14. Why was the process difficult for you?

- Application form was difficult to find
- Technical difficulties with the online application process
- Time consuming completing the application
- Accompanying documentation was difficult to provide (e.g. payslips, child's birth certificate etc.). Please explain, in the box below, which documents were difficult to provide and why.
- Eligibility criteria for the Offer was unclear
- I did not understand the application form
- Other (please specify):

Please explain (e.g. if applicable, which accompanying documentation was difficult to provide or if time consuming to complete, approximately how long did it take you):

15. In what language did you complete the application process (so the application form and any queries)?

- English
- Welsh
- Both English and Welsh

16. Were you able to complete the whole application process (so the application form and any queries) in the language of your choice?

- I was able to complete the whole application process in my language of choice
- I was able to complete most of the application process in my language of choice
- I was able to complete some of the application process in my language of choice
- I was able to complete a small part of the application process in my language of choice
- I was not able to complete any of the application process in my language of choice

Please explain:

17. You noted that there were elements of the application process that you were unable to complete in your preferred language. What language would you have preferred to complete these elements?

- Welsh
- English
- Other (please specify):

18. When applying for the Childcare Offer, was it clear to you what childcare provision was covered by the Offer during school holidays?

- Yes
- No
- Don't know

Please provide more details:

19. Since Sept 2020, have you encountered any delays in being able to take up the Childcare Offer?

Yes

No

20. Did the delay mean that you had to pay for childcare that would otherwise have been funded for a period?

Yes

No

Please explain (e.g. reason for the delay; for how long did you have to pay)

21. Local authorities periodically ask parents to confirm that they are still eligible for the Offer. Random spot checks are carried out with a sample of parents asked to provide further documents.

Were you asked to provide documents to confirm your eligibility during the year?

Yes

No

22. Was confirming your eligibility straightforward?

Yes - straightforward

No - there were some issues

Please explain any issues (e.g. Time-consuming; Missed email? Was there an interruption in receiving the Offer?)

23. The Childcare Offer is usually available for parents working at least 16 hours a week at the minimum wage. As a result of COVID-19, some parents' weekly hours temporarily fell below 16 hours and some parents' income temporarily increased above the threshold. Did this apply to you?

- Yes
- No

24. Did you need to provide evidence of your changed circumstances to the local authority, and if so was this straightforward?

- Did not need to inform local authority
- Informed local authority but did not need to provide evidence or complete any paperwork
- Informed local authority - and it was a straightforward process
- Informed local authority - and it was a difficult process

If there were issues with providing evidence of changed circumstances, please explain

25. When you took up the Childcare Offer, were you able to access Welsh-medium or bilingual provision for the funded hours of childcare that you used?

	I wanted to access it and was able to	I wanted to access it, but it was not available	I was not looking for this kind of provision	Don't know
Welsh-medium childcare provision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bilingual childcare provision (Welsh and English side by side)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please explain your answer

26. Does your child require additional support or have any additional learning needs?

- Yes
- No

27. You mentioned that your child requires additional support. Whilst taking up the Childcare Offer, was your childcare provider(s) able to give the support that your child needed?

- Yes
- No

If no, please explain what support was not available and whether you were still able to access/make use of the Childcare Offer for your child

The next few questions are about you and your family.

28. What is your current employment status?

- Employed - full time
- Employed - part time
- Employed - zero hours contract
- Self-employed / Freelance
- Apprentice
- Employed - full time, but currently on furlough
- Employed - part time, but currently on furlough
- Employed - zero hours contract, but currently on furlough

- Not working but looking for a job
- Not working and not looking for a job
- Other (please specify):

29. Has being able to access funded childcare enabled you to change your employment circumstances? To what extent do you agree or disagree with the following statements:

	Agree	Agree to an extent	Neither agree nor disagree	Disagree to an extent	Disagree	Don't know / not applicable
The Childcare Offer has been an incentive for me to increase the number of hours I work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Childcare Offer has been an incentive for me to change my job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Childcare Offer prompted me to start working or return to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30. If the Childcare Offer had not been available to you, what do you think your current employment situation would be? (Please tick all that apply)

- My employment situation would be the same or very similar
- I would be working more hours
- I would be working fewer hours
- I would be working in a job with lower pay
- I would be working in a job with higher pay
- I would be on a career path with fewer opportunities for progression
- I would be on a career path with more opportunities for progression

- I would not be in work
- Other (please specify)

Please use the space below to add any further details relating to your response

31. What is your individual income per year? That is, income from all sources and before tax and other deductions?

- Up to £5,199
- £5,200 to £10,399
- £10,400 to £15,599
- £15,600 to £16,779
- £16,780 to £20,799
- £20,800 to £25,999
- £26,000 to £31,199
- £31,200 to £36,399
- £36,400 to £51,999
- £52,000 to £99,999
- £100,000 or more

32. What is your ethnic group? Choose one option that best describes your ethnic group or background

White

- Welsh / English / Scottish / Northern Irish / British
- Irish
- Gypsy or Irish Traveller
- Any other White background

Asian or Asian British

- Indian

- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

Mixed / Multiple ethnic groups

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other mixed background

Black / African / Caribbean / Black British

- African
- Caribbean
- Any other Black / African / Caribbean background

Other ethnic group

- Arab
- Any other ethnic group
- I do not wish to disclose my ethnic origin

33. Do you have a partner or spouse living with you?

- Yes
- No

34. What is the current employment status of your partner or spouse?

- Employed - full time
- Employed - part time
- Employed - zero hours contract

- Self-employed / Freelance
- Apprentice
- Employed - full time, but currently on furlough
- Employed - part time, but currently on furlough
- Employed - zero hours contract, but currently on furlough
- Not working but looking for a job
- Not working and not looking for a job
- Other (please specify):

35. Has being able to access funded childcare enabled your partner/spouse to change their employment circumstances? Please ask them to what extent they agree or disagree with the following statements (or skip the question):

	Agree	Agree to an extent	Neither agree nor disagree	Disagree to an extent	Disagree	Don't know / not applicable
The Childcare Offer has been an incentive for my partner/spouse to increase the number of hours they work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Childcare Offer has been an incentive for my partner/spouse to change their job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Childcare Offer prompted my partner/spouse to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Agree Agree to an extent Neither agree nor disagree Disagree to an extent Disagree Don't know / not applicable

start working or
return to work

36. If the Childcare Offer had not been available to you, what do you think your partner/spouse's current employment situation would be? (Please tick all that apply)

- Their employment situation would be the same or very similar
- They would be working more hours
- They would be working fewer hours
- They would be working in a job with lower pay
- They would be working in a job with higher pay
- They would be on a career path with fewer opportunities for progression
- They would be on a career path with more opportunities for progression
- They would not be working

Please use the space below to add any further details relating to your response

37. What is your partner/spouse's income per year? That is, income from all sources before tax and other deductions?

- Up to £5,199
- £5,200 to £10,399
- £10,400 to £15,599
- £15,600 to £20,799
- £20,800 to £25,999
- £26,000 to £31,199
- £31,200 to £36,399
- £36,400 to £51,999
- £52,000 to £99,999

- £100,000 or more
- Don't Know

38. What is your partner/spouse's ethnic group? Choose one option that best describes their ethnic group or background

White

- Welsh / English / Scottish / Northern Irish / British
- Irish
- Gypsy or Irish Traveller
- Any other White background

Asian or Asian British

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

Mixed / Multiple ethnic groups

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other mixed background

Black / African / Caribbean / Black British

- African
- Caribbean
- Any other Black / African / Caribbean background

Other ethnic group

- Arab
- Any other ethnic group
- I do not wish to disclose their ethnic origin

39. Has accessing the Childcare Offer given you more flexibility in the way you work?

- Yes
- No
- Don't know

If yes, please provide examples:

40. Has accessing the Childcare Offer improved your opportunities for in-work training and other learning and development?

- Yes
- No
- Don't know

Please explain your answer:

41. Has accessing the Childcare Offer given you the potential to increase your earnings?

- Yes
- No
- Don't know

Please explain your answer:

42. The following statements refer to your experience of accessing the Childcare Offer funded childcare.

To what extent do you agree or disagree with the following statements:

	Agree	Agree to an extent	Neither agree nor disagree	Disagree to an extent	Disagree	Don't know / Not applicable
Accessing funded childcare has had a positive effect on my own and/or my partner's wellbeing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessing the Childcare Offer has reduced the financial burden of childcare.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessing the Childcare Offer has made it easier for me to undertake my work than would have been the case otherwise.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

43. Do you think there have been any positive or negative benefits from your child accessing formal childcare?

	Positive	No change	Negative	No sure / Don't know
Language learning (and other aspects of cognitive development)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Playing with other children (and other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Positive	No change	Negative	No sure / Don't know
aspects of social development)				
Managing their feelings (and other aspects of behaviour development)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Progression towards being toilet trained	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health and fitness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

44. What difference, if any, has accessing funded childcare through the Offer made to your family finances in terms of the amount of money you have at your disposal each month?

- We/I now have much more money to spend on things other than childcare each month as a result of accessing the Childcare Offer
- We/I now have slightly more money to spend on things other than childcare each month as a result of accessing the Childcare Offer
- We/I have about the same amount of money available as before I wasn't paying for childcare before
- We/I have about the same amount of money available as before as I was paying about the same for childcare now as before
- Don't know

If you wish, please use the space below to provide examples of how this has made a difference to you and your family

45. To what extent has accessing funded childcare through the Offer had an impact on enabling you/your family to afford the following:

	Large impact - could not afford this before but now can	Slight impact - could afford this before but now it's easier to afford this	No impact - could afford this before and still can	No impact - could not afford this before and still cannot afford this
To make regular savings for rainy days	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To pay credit card bills on time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To keep my home in a decent state of decoration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To take a holiday for at least one week a year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please explain your answers:

46. To what extent has accessing funded childcare through the Offer had an impact on the following:

	Large impact	Slight impact	No impact
Reducing the stress of organising care for my child	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please explain your answers:

47. Do you have any concerns about the protective measures implemented at the setting(s) your child attends in response to Covid-19 (e.g. wearing masks, keeping children in smaller contact groups)?

48. If you're willing to provide further feedback please provide your contact details below.

Name

Email

Telephone

Providers Survey

This survey asks your views and experience of providing childcare funded by the Childcare Offer for Wales. Your responses will be used to inform an evaluation of the Childcare Offer which the Welsh Government has commissioned Arad Research to undertake.

The survey will take approximately 15 minutes to complete.

Participating in the survey is voluntary. All the information gathered will be reported anonymously. The evidence gathered during the evaluation will be included in a report, and possibly in other publications, by Arad Research and Welsh Government. More information about your data and your rights is available in this [privacy notice](#).

If you would like to receive further information about the research please contact: Sioned Lewis on sioned@arad.wales or 029 2044 0552.

1. Has your setting delivered any childcare funded by the Childcare Offer for Wales since September 2020? [The Childcare Offer for Wales: Help with childcare costs for working parents of 3 to 4 year olds] *

Yes

No

This study is about the Welsh Government-funded Childcare Offer from September 2020 onwards.

You have indicated that your setting has not delivered any childcare funded by the Childcare Offer for Wales since September 2020. If this is correct, select 'Next Page', otherwise please select 'Previous Page' and amend your answer.

2. In which local authority is your setting based? *

3. From which of the following local authority(ies) do you receive funding to deliver the Childcare Offer?

Blaenau Gwent (also delivering on behalf of Torfaen)

Caerphilly

Cardiff

Ceredigion (also delivering on behalf of Carmarthenshire, Powys and Pembrokeshire)

Flintshire (also delivering on behalf of Wrexham and Denbighshire)

Gwynedd/Isle of Anglesey (also delivering on behalf of Conwy)

Neath Port Talbot

Newport (also delivering on behalf of Vale of Glamorgan and Monmouthshire)

Rhondda Cynon Taf (also delivering on behalf of Merthyr Tydfil and Bridgend)

Swansea

5. About your setting

4. What service is your setting registered as?

- Childminder
- Full day care
- Sessional day care
- Out of school childcare
- Open access play provision
- Creche
- Other childcare provider / not sure - please explain.

5. What is the main language through which your service is provided? (See here for a description of the language categories)

- Welsh-medium
- Bilingual (where Welsh and English are used side by side)
- English-medium with some bilingual elements
- English-medium
- Other (please specify):

6. How many children are cared for at your setting?

	Number of children
Total number of children using your service	<input type="text"/>
Number of children who use this service on a full-time basis	<input type="text"/>
Number of children who use this service on a part-time basis	<input type="text"/>
Number of children who use the service on an ad-hoc basis	<input type="text"/>
Average number of children using your service per day	<input type="text"/>
Total number of children supported through the Childcare Offer	<input type="text"/>
Total number of children supported through the Childcare Offer who are new customers since September 2020	<input type="text"/>

7. Have you noticed a change in demand for Childcare Offer childcare at your setting compared to before COVID-19?

- Yes - more demand for places
- Yes - less demand for places
- No change

Please explain:

8. Approximately how much time do you (or your staff) spend monthly on administration tasks linked to the Childcare Offer?

- No extra time
- Up to one hour
- 1-2 hours
- 2-5 hours
- 5+ hours

Which aspects of the administration processes are most time consuming? Please provide details below:

9. Have you (or your staff) been able to complete administration tasks linked to the Childcare Offer in your language of choice?

- Yes - wholly in our language of choice
- Yes - partly in our language of choice
- No

Please provide further details if you wish.

8. Providing the Childcare Offer

10. Do you promote the Offer to parents?

- Yes
- No

If yes, how do you promote? E.g. posters, meetings. If no, why not?

11. Do parents supported by the Childcare Offer, who previously paid for childcare at your setting, change their hours once they start receiving the Offer?

- Parents have tended to increase their hours
- A mix of changes - some increased and some decreased
- Parents have tended to decrease their hours
- No change / hardly any change to hours
- Not applicable - most Childcare Offer parents were new customers

12. Do Childcare Offer parents tend to take up all the funded hours they are eligible to take up?

- Yes - All parents
- Yes - Most parents
- Yes - Some parents
- No parents take up all hours
- Not applicable – setting not open for enough hours

13. Do Childcare Offer parents use all the childcare hours that they book?

- Yes - All parents
- Yes - Most parents
- Yes - Some parents
- No parents use all hours booked

14. Do Childcare Offer parents access more hours than the hours funded through the Offer?

- Yes - All parents
- Yes - Most parents
- Yes - Some parents
- No parents access more hours than are funded through the Offer

Please provide further details if you wish.

15. Are you aware of any of your customers / parents, who are eligible for the Offer but have decided not to take it up?

- Yes
- No

If yes, do you know why they may not have taken it up?

16. Do you have Childcare Offer funded children at your setting who take-up a Foundation Phase Nursery place at a different setting?

- Yes
- No
- Don't know

17. Do you provide wraparound care for these children at your setting?

Yes

No

If yes, please provide details: If no, please explain why:

18. Have you had to make changes to any wraparound provision due to Covid-19?

Yes

No

Not applicable

If yes, please provide details:

19. Do you provide a pick-up / drop-off service from Foundation Phase Nursery settings for children aged 3 and 4 receiving the Offer within your setting?

Yes

No

Please provide details:

20. How straightforward or challenging is it for your setting to provide this pick-up / drop-off service?

Very straightforward

Fairly straightforward

Fairly challenging

Very challenging

Please explain your answer:

21. Do you provide transport for this pick-up / drop-off service for children within your setting?

Yes

No

If yes, please provide details - if no, please provide any reasons as to why not:

22. How straightforward or challenging is it for your setting to provide this transport service?

- Very straightforward
- Fairly straightforward
- Fairly challenging
- Very challenging

Please explain your answer:

17. Business changes

23. Are you funded by the local authority to deliver early education (Foundation Phase) at your setting?

- Yes
- No

24. Have you recently made, or are you planning to make any changes to the Foundation Phase Nursery at your setting?

- We have started offering Foundation Phase Nursery
- We are planning to offer Foundation Phase Nursery
- We have stopped offering Foundation Phase Nursery
- We are planning to stop offering Foundation Phase Nursery
- No changes planned

25. From January 2021 the funding for Foundation Phase Nursery (FPN) has started to be aligned with the current funding rate for Childcare Offer childcare (£4.50). What difference, if any, will the change in funding rate make to:

	A strong positive effect	Some positive effect	No effect	Some negative effect	A strong negative effect	Not applicable
Your setting's financial situation	<input type="checkbox"/>					
Likelihood of continuing to offer FPN at your setting	<input type="checkbox"/>					
Likelihood of increasing provision of FPN at your setting	<input type="checkbox"/>					

Please explain your answer

26. Have you recently made any of the following changes within your childcare setting?

	Yes, as a direct result of Covid-19	Yes, but not as a direct result of Covid-19	No
Extend opening times/hours during term time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decrease the opening times/hours during term time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes, as a direct result of Covid-19	Yes, but not as a direct result of Covid-19	No
Extended hours / Opened during school holidays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decreased hours / Shut during school holidays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase childcare provision for younger children (under 3) and/or older children 5+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decrease childcare provision for younger children (under 3) and/or older children 5+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. If you answered yes to any of the above changes, do you plan to keep these changes in the future?

- Yes
- No
- Not sure

If yes, please specify what changes you will be keeping:

20. Holiday provision

28. Is your setting open during any of the school holidays?

- Yes
- No

29. Is your setting open during all of the school holidays?

- Yes
- No

If no please provide brief details (e.g. how many weeks of the school holidays are you closed)

30. Do parents supported by the Childcare Offer pay for childcare provision available during the 4 weeks of school holidays not funded by the Childcare Offer?

Please select which scenario below best applies to your setting.

- Parents have a **contract** with us for the year and are charged **full fees** for the 4 weeks.
- Parents have a **contract** with us for the year and are charged **half fees** for the 4 weeks.
- Parents book and pay for childcare in the holiday weeks that they require.
- Our setting is **closed for 1, 2 or 3 weeks** of the year (e.g. over Christmas). We **don't charge parents for these weeks** but they are charged full fees / half fees for the remaining weeks during the school holidays.
- Our setting is **closed for 4 weeks** a year and so we **don't charge** parents for those 4 weeks.
- Our setting is **closed for 4 weeks** a year but we **charge parents full fees / half fees** for those 4 weeks.
- Other (please specify)

Please provide further details on the payment arrangements between your setting and your parents for these 4 weeks

31. If applicable, are all parents aware in advance that they will be required to pay for provision during these 4 weeks?

- All parents are aware
- Some parents are aware
- Most parents are not aware
- No applicable - our setting is closed and we do not charge parents for these 4 weeks

Please provide any additional information in the box below – e.g. how you ensure that parents are aware or parents reaction to paying for this provision etc

24. Sustainability

32. Has the Childcare Offer had a positive or negative effect on the profitability and sustainability of your business?

	A strong positive effect	Some positive effect	No effect	Some negative effect	A strong negative effect
Profitability	<input type="checkbox"/>				
Sustainability	<input type="checkbox"/>				

Please explain your answer:

33. Is the payment of £4.50 an hour to provide childcare through the Childcare Offer a commercially viable option for you?

- Yes
- No

Please explain your answer:

34. What is your average hourly fee for 3-4 year old children not funded by the Childcare Offer?

- Less than £4.00
- Between £4.00 and £4.49 per hour
- Between £4.50 and £4.99 per hour
- Between £5.00 and £5.49 per hour
- Between £5.50 and £5.99 per hour
- Between £6.00 and £6.50 per hour
- More than £6.50 per hour (please specify):

35. Do you receive Childcare Offer funding from more than one local authority?

- Yes
- No

36. Are there any differences in the administration processes between these local authorities?

- Yes
- No

Please provide details:

37. Are the payments you receive for delivering the Childcare Offer places delivered to you in a timely and accurate manner?

- Yes, always
- Yes, usually
- No

Please use the box below to expand on your answer:

38. Do you include additional charges for any of the following? (Please tick all that apply)

- Meals / snacks
- Transport
- Other consumables e.g. equipment, music lessons, trips etc
- Registration and administration costs
- Top-up fees
- No additional charges are included
- Other (please specify):

39. Do these charges apply to all parents or only parents accessing the Childcare Offer?

- Yes - additional charges are for all parents
- No - additional charges are for Childcare Offer parents only

40. Do you provide all parents (i.e. those supported by the Childcare Offer and those that are not) with a bill that itemises all these additional charges?

- Yes
- No

Please provide details:

30. Final Questions: Effects of COVID-19

41. How has COVID-19 affected your setting?

	A strong positive effect	Some positive effect	No effect	Some negative effect	A strong negative effect	Not applicable
Your setting's profitability	<input type="checkbox"/>					
Ability to support children with ALN	<input type="checkbox"/>					

	A strong positive effect	Some positive effect	No effect	Some negative effect	A strong negative effect	Not applicable
Ability to recruit suitably qualified staff	<input type="checkbox"/>					
Ability to retain staff	<input type="checkbox"/>					
Offering flexible childcare (e.g. wraparound, extended hours)	<input type="checkbox"/>					

Additional information:

42. Since September 2020, has your setting had to temporarily close due to Covid-19?

- Yes
 No

43. During the period when your setting was temporarily closed due to Covid-19, did you continue to receive Childcare Offer funding payments?

- Yes
 No

44. Did receiving this continued Childcare Offer funding during this period of closure have a positive or negative effect on the profitability and sustainability of your business?

	A strong positive effect	Some positive effect	No effect	Some negative effect	A strong negative effect
Profitability	<input type="checkbox"/>				
Sustainability	<input type="checkbox"/>				

Please explain your answer:

45. To what extent has Covid-19 had an impact on children at your setting, in terms of the following:

	A strong positive effect	Some positive effect	No effect	Some negative effect	A strong negative effect
Cognitive development (e.g. attending, remembering, planning, reasoning, problem solving)	<input type="checkbox"/>				
Social development (e.g. emotional expression, emotional regulation, attachment, temperament, play, peer interaction and friendship)	<input type="checkbox"/>				
Speech and language development (both understanding and using languages)	<input type="checkbox"/>				
Physical development and health (e.g. fine motor skills, gross motor skills, brain development and health)	<input type="checkbox"/>				

Please provide further details:

46. Have you received any business advice/guidance to help you plan your business?

- Yes
- No
- Don't know

47. If you have received business advice/guidance, where have you received it from?

- Local authority
- Business Wales
- Sector representative body e.g. Cwllwm, NDNA, Mudiad, Pacey
- Social Care Wales
- Another childcare provider
- Not sure
- Other (please specify):

48. What was the topic/nature of the advice/guidance you received?

49. Is there any aspect of childcare as a business you would like (further) support with?

50. If you have any other comments you would like to make in relation to the Childcare Offer, please provide your comments in the box below:

51. If you're willing to provide further feedback, please provide your contact details below. Then click 'Finish Survey' to submit your answers.

Your name	<input type="text"/>
Setting name	<input type="text"/>
Email address	<input type="text"/>
Telephone number	<input type="text"/>