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Analysis for Policy



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Evaluation of Year Five (September 2021 to August 2022) of the Childcare Offer

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Title: Evaluation of Year Five (September 2021 to August 2022)
of the Childcare Offer

Authors:

Stuart Harries, Jennifer Lane, Sioned Lewis and Kara Stedman,
Arad Research

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

For further information please contact:

Name: Dr Jack Watkins

Division: Equality, Poverty and Children Evidence & Support Division

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

Email: TalkChildcare@gov.wales

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Glossary

Acronym/Key word	Definition
Additional Learning Needs (ALN)	<p>The Special Educational Needs (SEN) framework, which had been in place for around 25 years, has been replaced by the Additional Learning Needs (ALN) system, which was established by the 2018 Act. The definition for ALN is essentially the same as the definition previously used 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 cannot 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 additional learning needs or physical disabilities (ALN). See note above.
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 eligible parents of three and four year olds, for up to 48 weeks of the year.
CSA – Childcare Sufficiency Assessment	A requirement placed on local authorities to prepare assessments of the sufficiency of childcare provision (Childcare Sufficiency Assessment) in their area every five years and to keep these under review.
Cylch Meithrin	A Cylch Meithrin is a Welsh medium playgroup (plural: Cylchoedd).
Flying Start	Welsh Government programme providing support in some of Wales' 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 two to three year olds eligible for support.
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.
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. The term “Special Educational Needs” (SEN) has been replaced in Wales by the term “Additional Learning Needs” (ALN), though this transition occurred during the period relevant to this research. See ALN above.

1. Introduction

- 1.1 The Welsh Government's Childcare Offer for Wales provides eligible 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 2021 to August 2022 – the fifth 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 to eligible parents. 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 termtime. This can be provided in either a maintained (school) setting, or a funded non maintained (childcare) setting. During the 39 weeks of school termtime, the Offer is made up of both this funded early years education provision and additional hours of funded childcare. The provision of early years education varies across local authorities, but most commonly between 10 and 12.5 hours of early education is available per week, leaving 17.5 to 20 hours of funded childcare per week during term-time as part of the Offer. For the remaining nine weeks of entitlement, which fall in the school holidays, the entitlement is to 30 hours of funded childcare. There are four unfunded weeks in every year.
- 1.3 During the period under review (September 2021 to August 2022) childcare under the Offer was available to three and four –year old children whose parents earned on average at least a weekly minimum equivalent to 16 hours at the applicable national minimum wage and earned £100,000 per parent per year or less¹. All parents (or guardians, stepparents and long term live in partners within a household) were eligible for the Offer if they had a child within the age range and met the definition of a working parent.
- 1.4 During the period under review, the Offer defined 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 had to be working to qualify for the Offer. However, there were some exceptions: for example, where

¹ Eligibility criteria for the Offer will be extended during year six to include include parents undertaking full or part time further or higher education courses – see also paragraph 1.10

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 Offer can be taken to mean funded childcare provision. The early years education is currently delivered through a separate mechanism and is not considered in any detail in this report.

Delivery of the Offer to date

- 1.6 The Offer has been available across the whole of Wales since April 2019. It was launched in 2017 in seven pilot areas. The phased rollout of the Offer continued into September 2018, when a new delivery model was introduced which saw some local authorities take on the role of delivery authorities and engagement authorities. Delivery authorities are responsible for processing applications and processing payments, and engagement authorities are responsible for promoting the Offer to eligible parents and providers. This delivery model remained in place during the full rollout in 2019 and continued to remain in place during year five 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
Gwynedd*	Anglesey*
	Conwy
Blaenau Gwent*	Torfaen
Flintshire*	Wrexham
	Denbighshire
Rhondda Cynon Taf*	Merthyr Tydfil
	Bridgend
Newport	Monmouthshire
	Vale of Glamorgan
Ceredigion	Carmarthenshire
	Pembrokeshire
	Powys
Cardiff	
Neath Port Talbot	
Swansea*	
Caerphilly*	

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

- 1.7 This report presents findings from the evaluation of the fifth year of the Offer. Further details of the evaluation methods are presented in section 2 of this report.

Year five implementation

- 1.8 The year five delivery model of the Offer largely continued as it did in year four once temporary measures such as the Coronavirus Childcare Assistance Scheme (C-CAS) and other COVID-19 restrictions were lifted in 2020 – 21. Some delivery policy changes did take place in year five, however, including an increase in the hourly funding rate paid by the Welsh Government, via delivery authorities, to participating providers. This rate increased from £4.50 an hour to £5.00 an hour – the first increase in the funding rate since the Offer was launched. In April 2022, the Offer was also extended to parents who had ‘newly adopted.’ These are parents who are looking after a child they intend to adopt but who have yet to complete the legal process involved. These parents had previously fallen outside the Offer’s eligibility criteria. In addition, children who were the subject of an adoption were not previously eligible for the Offer while the parent was on adoption leave. However, since April 2022 these children are now eligible, as long as it is in line with the child's Adoption Support Plan.
- 1.9 Although no other significant changes to delivering the Offer took place during year five, plans were introduced in preparation for changes to be implemented in year six. These included plans to roll out the new digital service. The new service was piloted in some local authorities during year five. All local authorities received information and training from the Welsh Government about the new service. The Welsh Government also held webinars for childcare providers and provided online guidance for parents and childcare providers to help prepare for its rollout from November 2022 for the January 2023 intake.
- 1.10 Plans were also underway during year five to extend eligibility of the Offer to include parents undertaking full or part time further or higher education courses. To be eligible, parents must be attending a course that lasts 10 weeks or longer during a single academic year. Eligible courses also include distance learning courses such as those delivered by the Open University. However, courses that are shorter than 10 weeks or delivered by providers who are not further, or higher education institutions are not eligible. Parents who were already in education in 2021 / 22 and will continue to be in education in 2022 / 23, were able apply for the Offer from July 2022 onwards in preparation for the September intake.

- 1.11 Until now, parents who are term time only workers have not been eligible for Offer funded childcare provision available during nine of the 13 weeks of school holidays. Since September 2022 these parents, along with parents in education, have been entitled to this provision.
- 1.12 During 2022 / 23, there will be a staggered rollout of an expansion of Flying Start provision. This will include increasing the number of hours of funded childcare provision for two year olds available in eligible areas, as well as expanding the geographical area that will be eligible for Flying Start support. Although this does not directly influence the Offer for three and four year olds in Wales, it may have knock on consequences within settings that deliver childcare funded by Flying Start and the Offer. It may also influence the future direction of policies relating to the delivery of the Offer.

Overview of numbers accessing the Offer

- 1.13 During the period September 2021 to August 2022, the Offer was accessed by 21,729 children. 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. 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 2021 and August 2022

Local authority	No. of children accessing the Offer
Blaenau Gwent	407
Bridgend	715
Caerphilly	1,158
Cardiff	2,580
Carmarthenshire	1,031
Ceredigion	430
Conwy	807
Denbighshire	903
Flintshire	1,609
Gwynedd	966
Isle of Anglesey	548
Merthyr Tydfil	254
Monmouthshire	743
Neath Port Talbot	1,007
Newport	1,092
Pembrokeshire	641
Powys	1,112
Rhondda Cynon Taf	1,244
Swansea	1,327
Torfaen	688
Vale of Glamorgan	1,104
Wrexham	1,363
Total	21,729

Source: Termly monitoring data

1.14 The mean number of hours booked and attended per child each term, from September 2021 to August 2022, is presented in Table 1.2

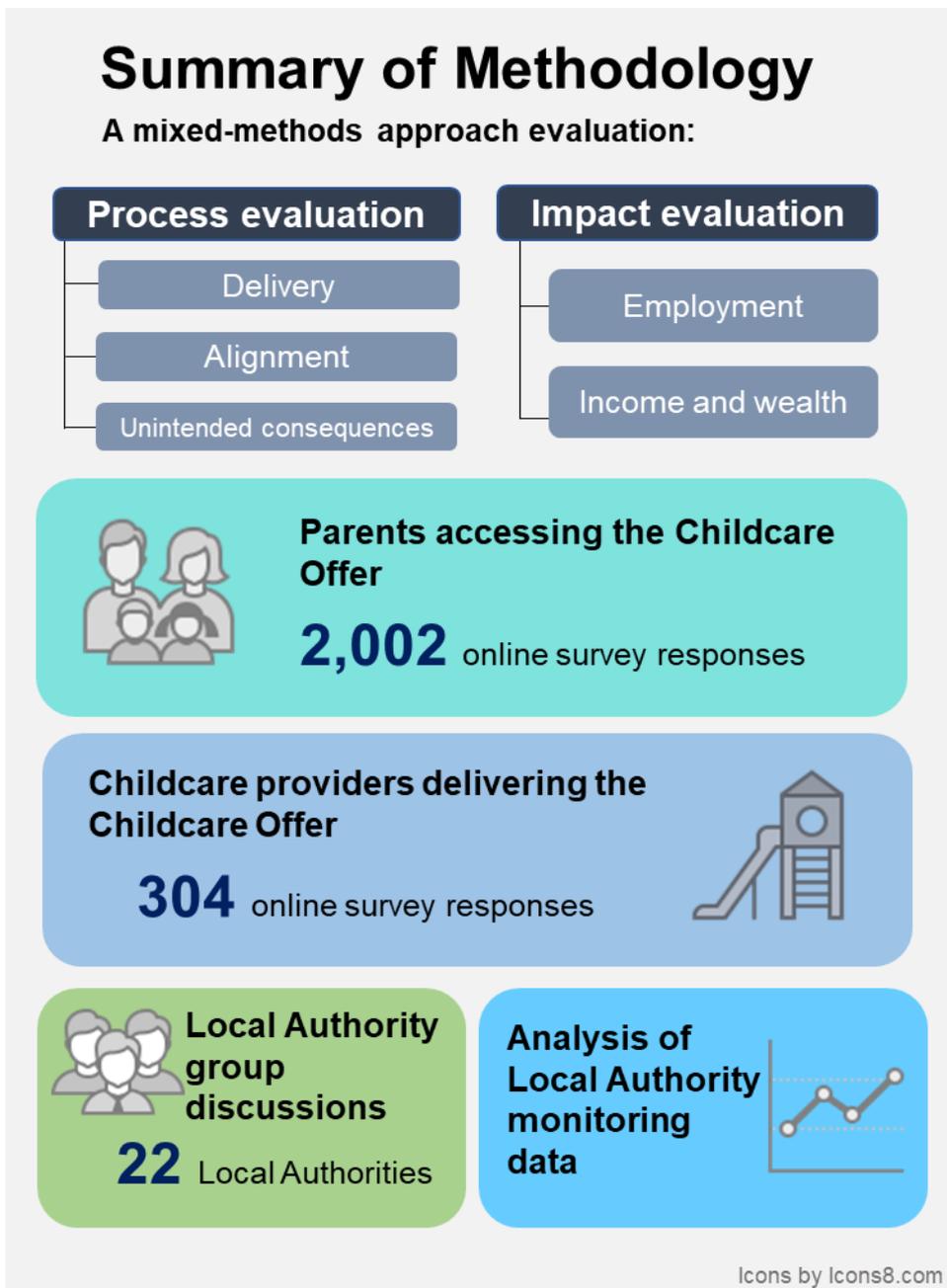
Table 1.2: Average number of hours booked and attended per child each term between September 2021 and August 2022

Term	Average no. of hours booked	Average no. of hours used
Autumn	215	195
Spring	196	177
Summer	243	229

Source: Termly monitoring data

2. Methodology

- 2.1 This section outlines the methodology adopted for the year five evaluation, 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](#) as well as this fifth year report.
- 2.3 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.
- 2.4 The evaluation for this fifth year is again focusing on these aims, covering the period of delivery between September 2021 and August 2022 and draws on the views and experiences of Welsh Government officials, local authority representatives, and participating providers and parents. The year five evaluation has been undertaken with a slightly lighter touch than has been the case in previous years. This evaluation has focussed on gathering views and opinions from participating parents and childcare providers via an online survey and comparing these responses with those gathered from previous years. The year five evaluation did not include follow up one to one interviews with parents and providers, although our year five approach did include group discussions with all delivery and engagement local authorities as well as some Welsh Government representatives responsible for overseeing the Offer's delivery.

Overview of methodology

2.5 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	Date of fieldwork
Welsh Government Officials	Video interviews	2	September - October 2022
Members of local authorities Childcare Offer team	3 video group discussions	22	September – October 2022
Participating childcare providers	Online survey	304	July-September 2022
Participating parents	Online survey	2,002	July - August 2022

Contextual interviews

2.6 Interviews were held with members of the Welsh Governments' Childcare Offer team to gain further insights into the context within which the Offer was being delivered in year five. This included any changes in policies relating to early years provision; as well as the development of the new National Digital Childcare Offer system.

2.7 The local authorities' Childcare Offer teams were invited to take part in virtual discussion groups in Autumn 2022 to share their experiences of the Offer. Three dates for discussion groups were offered to all local authority Childcare Offer teams who were given the opportunity to attend one of these three sessions. These group discussions covered the following topics:

- Take up of the Offer compared to previous years;
- Overview of delivery: any changes, challenges, and success factors;
- Partnership working between local authorities;
- Providers' experiences in the last year;
- New National Digital Childcare Offer system; and
- Future delivery plans.

Survey of childcare providers

- 2.8 An online survey of childcare providers that had delivered the Offer between September 2021 and August 2022 was conducted July – September 2022, with a link distributed to all childcare providers in Wales who had delivered the Offer between September 2021 and August 2022. Topics within the survey included: the communication providers receive from local authorities; the influence of the Offer on provider delivery; as well as the impact of the Offer on providers' sustainability. The survey questionnaire is included in Annex A.
- 2.9 This stage of the fieldwork, used a census approach and all providers delivering the Offer within each local authority were invited to take part in the survey. A total of 2,437 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 2022.
- 2.10 The survey was completed by 304 providers with a response rate of 12 per cent.² Table 2.2 shows the breakdown of survey responses and the response rate as a proportion of the sampling frame by local authority.

² The response rate exceeded the minimum number of 302 responses required to be 95% confident that the providers' survey responses were reliable between a five per cent margin of error. The larger the sample of the population (the providers survey was distributed to 2,437) the more we can be confident that providers' answers reflect the views of the total population of providers who delivered the Offer.

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	10	19
Bridgend	7	12
Caerphilly	17	10
Cardiff	33	16
Carmarthenshire	17	11
Ceredigion	13	16
Conwy	22	17
Denbighshire	12	16
Flintshire	25	14
Gwynedd	19	14
Anglesey	14	20
Merthyr Tydfil	1	4
Monmouthshire	7	8
Neath Port Talbot	14	16
Newport	11	11
Pembrokeshire	13	13
Powys	16	13
Rhondda Cynon Taf	7	5
Swansea	13	13
Torfaen	8	13
Vale of Glamorgan	13	10
Wrexham	9	9
Not stated**	3	-
Total	304	

*This refers to the survey response rate as a per centage 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

Survey of parents

2.11 An online survey of parents accessing childcare under the Offer was conducted July – August 2022, with a link distributed to all parents across Wales who had received support through the Offer between September 2021 and August 2022. Topics within the survey included the application process; what parents' childcare arrangements were prior to accessing the Offer; suitability of the provision available; and the impact of the Offer on the family and work opportunities for parents. The survey questionnaire is included in Annex A.

- 2.12 For this stage of the fieldwork, using a census approach, all parents taking up the Offer within each local authority were invited to take part in the survey. A total of 18,079 parents³ 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 2022.
- 2.13 The survey was completed by 2,002 parents with a response rate of 11 per cent.⁴ Table 2.3 shows the breakdown of survey responses and the response rate as a proportion of the sampling frame by local authority.

³ This number is lower than the number of children accessing the Offer because some parents had more than one child accessing the Offer.

⁴ The response rate exceeded the minimum number of 376 responses required to be 95% confident that the parents' survey responses were reliable between a five per cent margin of error. The larger the sample of the population (the parents survey was distributed to 18,079) 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	54	15
Bridgend	38	13
Caerphilly	106	10
Cardiff	262	12
Carmarthenshire	101	10
Ceredigion	29	8
Conwy	93	12
Denbighshire	102	14
Flintshire	128	10
Gwynedd	149	16
Isle of Anglesey	70	14
Merthyr Tydfil	11	12
Monmouthshire	70	10
Neath Port Talbot	30	4
Newport	107	11
Pembrokeshire	50	9
Powys	118	11
Rhondda Cynon Taf	49	8
Swansea	122	12
Torfaen	27	5
Vale of Glamorgan	94	9
Wrexham	116	10
Not stated**	76	-
Total	1,926	

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

** Some parents did not indicate the local authority they live in

Source: Survey of parents accessing the Offer

3. Implementing the Offer

Implementing the Offer

Key findings

Take-up returned to pre-pandemic levels for most Local Authorities.

Some local authorities have increased their **marketing and parental engagement**.



Number of **children with ALN** supported by the Offer **increased** due to negative effects of COVID-19 and changes to ALN legislation.



88% of parents of children requiring **ALN support** said their childcare provider was able to provide the sufficient support.

Childcare provider **staff recruitment and retention** issues continue to be reported.



Process of preparing childcare providers for the **new digital system** was going well.



Local authorities felt **well informed** regarding the introduction of the **new digital system**.



Icons by Icons8.com

Source: Childcare Provider Survey. N= 304
Childcare Offer Parent Survey. N= 2,002

- 3.1 The findings presented in this section draw on the Offer monitoring data gathered by the Delivery local authorities as well as survey evidence gathered from parents and childcare providers.⁵ The findings also reflect views expressed by local authority representatives during online group discussions.
- 3.2 This section begins with a review of the take up of the Offer during this period, followed by a review of how local authorities are preparing for the introduction of the new centralised digital service.

Take up of the Offer

- 3.3 During the period September 2021 to August 2022, the Offer was delivered to 21,729 children.⁶ This is relatively consistent with, if not slightly higher than, the take up recorded in previous years.⁷
- 3.4 Most local authority representatives noted that take up of the Offer in year five had returned to pre pandemic levels. Some local authorities reported that take up in year five was slightly higher than it had been pre pandemic. Some of these local authority representatives associated the increase in take up of the Offer with a general increase in demand for formal childcare amongst parents who wanted to avoid the health risks experienced during the pandemic when relying on relatives, particularly elderly relatives to provide them with informal childcare. Some authorities had also increased their marketing and parent engagement activities during year five and this, in their view, had prompted an increase in take up of the Offer.
- 3.5 Not all local authority representatives reported a consistent or increased take up of the Offer: a drop in take up during year five was reported in some authorities. One of these authorities noted that engagement officers had left their team and that they had not been able to recruit to those posts. They therefore considered any drop in take up in their area to be due to the fewer awareness raising activities with eligible parents that they had been able to conduct during the year. However, another local authority reported that take up in their area had been in decline since the Offer was launched even though it had been extensively promoted to eligible

⁵ The Delivery local authorities are responsible for processing applications – see list in figure 1.1

⁶ This figure is taken from the termly monitoring data that all local authorities return to Welsh Government.

⁷ In year two, 15,929 children used the Offer (the Offer was fully rolled out by the end of the year) and in year three, 16,377 children used the Offer (between September 2019 and March 2020).

parents. Some local authority representatives suspected that a lack of available wraparound provision could be a possible reason for low take up in their area, as well as fears that taking up the Offer could adversely affect other benefits which eligible parents may be claiming.

Additional learning needs (ALN) and use of the Additional Support Grant (ASG)

- 3.6 When asked whether their child(ren) required additional support or had any additional learning needs (ALN), just under six per cent of year five parent survey respondents answered yes. This is slightly higher than the 4.5 per cent of respondents who answered the same during the year four survey. Of those parents whose child(ren) required ALN support, 88 per cent noted that their childcare provider was able to give them all the support they needed – this is also higher than the 79 per cent who reported the same during the year four survey.
- 3.7 Local authority and Welsh Government representatives noted that in many areas across Wales the number of children supported by the Offer with ALN had increased during 2021 – 22. In their view there were two factors influencing this increase in demand. The first was the negative effect that the COVID-19 lockdowns had on the emotional and behavioural development of many children. The second was the ALN legislation developments and the introduction in many areas of ALN coordinators, which has made it easier for parents and providers to identify the ALN needs of children. As a result, demand for ALN support that can be funded by the Additional Support Grant (ASG)⁸ has also increased. During the first two years of the Offer, local authorities reported an underspend in this grant; however, by year five, many local authorities were reporting that the demand for identified ALN support for children supported by the Offer exceeded the original financial resources allocated through the ASG. The Welsh Government did ensure that additional grant funding was available to cover additional demand where needed. However, it was unclear from the local authority feedback whether applications for this additional grant were made.
- 3.8 Overall, the findings indicate that the number of children supported by the Offer who have ALN has increased across local authorities during year five. However,

⁸ The Childcare Offer for Wales Additional Support Grant is a separate funding stream which local authorities can draw on to help ensure that eligible children with additional needs are able to access the childcare element of the Offer in the same way as other eligible children

they also indicate that providers are able to accommodate most of these needs. Their ability to do so is likely to have been supported, at least to some extent, by the additional funding available through the ASG. However, many local authority representatives reported during year five that the ASG did not cover all the additional costs associated with supporting the ALN needs of children supported by the Offer in their area. Furthermore, some noted that their spending on supporting Offer funded children with ALN went over their anticipated budget during year five, suggesting that they needed to access further funding to cover all the costs.

Local provision of childcare

3.9 The demand for Offer funded childcare appears to have been met in most cases by the availability of providers to deliver it. However, many local authority representatives remain concerned about what some termed as the continued precarious situation facing many settings. Staff retention and recruitment challenges reported in previous Childcare Offer evaluation reports remain, particularly in Welsh medium settings, and many representatives were concerned that the current cost of living increases will place more providers in a vulnerable situation. Many acknowledged that the increased funding rate will help alleviate some of these challenges but feared that it may not be enough.

Preparing for the new national digital service

3.10 The new national digital service, which will replace the Offer's current administration systems developed by delivery authorities, was piloted across some local authorities during year five. From September 2022, all local authorities started the 'onboarding' phase of the new system, ensuring that Childcare Offer staff and providers delivering the Offer are familiar with the new system and processes involved. Parents who will be eligible for the Offer from January 2023 have been able to apply for the Offer via the new system from November 2022. Providers will be able to submit their first claims for the Offer through the new system in January 2023 when the new system will go fully live. For around nine months the new system will operate side by side with the existing legacy systems until the last cohort of parents to apply through legacy systems leave the Offer.

- 3.11 During year five of the Offer, the Welsh Government worked with local authorities and Cwlwm partners to inform and prepare them for the new system and to enable them to support providers in their areas to use the new system. Information, webinar training and support was also offered directly to childcare providers to prepare them for the rollout in year six – see also paragraphs 4.14 – 4.17. Local authority representatives noted that the process of preparing childcare providers to use the new system was going well, although some noted that a number of providers in their area had not yet signed up for the Welsh Government training available. Some also expressed concerns that providers in their area may find using two systems running in parallel for the initial rollout period, challenging, and as such were preparing themselves for a number of enquiries and requests for support from providers from January 2023 onwards.
- 3.12 Local authority representatives generally felt that they were well prepared to use the new system and noted that, during year five, they had received a considerable amount of information from the Welsh Government regarding its introduction. A few local authority representatives noted that, if anything, they had received too much information from the Welsh Government and felt overwhelmed by the volume they had received, particularly as it coincided with their CSA reviews. However, they also acknowledged that the Welsh Government had provided a good level of support and been very responsive to any questions asked by local authorities about the system.
- 3.13 Overall, most local authorities felt *‘as prepared as they could be’* at this stage, although some also noted that they would remain uncertain and slightly apprehensive about using the new system until they reached the point when they could apply it in practice.

4. The Offer's influence on providers

The Offer's influence on providers

Key findings

62% of providers spent up to an hour each month on **administration** tasks for the Offer.



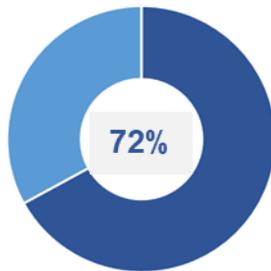
97% of providers **promoted the Offer** using flyers, social media and face-to-face discussions.



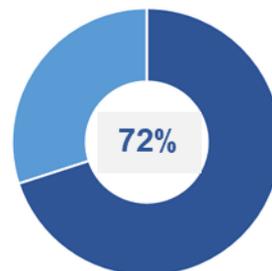
83% of providers offered **wraparound** care services.



91% of providers offering a drop-off / pick-up service found this easy.



reported improved **profitability**



reported improved **sustainability**

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Source: Childcare Provider Survey. N= 304

Profile of providers delivering the Offer

- 4.1 Any registered childcare provider is eligible to take part in the Offer and during the 2021/22 period, 2,252 providers delivered childcare funded by the Offer (around 65% of registered childcare and play settings⁹). All providers registered to deliver the Offer were invited to complete an online survey, and responses to the survey were received from providers located in each of the 22 local authorities in Wales. Of the 304 providers that responded to the survey, over half (55 per cent) were childminders, just over a quarter (28 per cent) were full day care settings, 13 per cent were sessional day care and four per cent were out of school childcare.¹⁰
- 4.2 The number of children cared for within the surveyed settings ranged from one to over 150, with each setting on average caring for 26 children. The number of children supported by the Offer at each of the surveyed provider's setting ranged from one to 70, with an average of eight Offer funded children being cared for at each setting.
- 4.3 Almost half of the providers surveyed (45 per cent) delivered an English medium childcare service with some bilingual elements; just under a third (30 per cent) delivered an English medium service; 15 per cent delivered a Welsh medium service and 10 per cent delivered a bilingual service (where Welsh and English are used side by side).

Accommodating demand for childcare

- 4.4 Surveyed childcare providers were asked whether they had been able to provide spaces for every parent who had requested a place for their child during 2021 - 22 including requests for places funded by the Offer and / or funded in other ways. Most providers (60 per cent) noted that they had not been able to accommodate all requests and had to turn some parents away. The main reason these providers could not accommodate all these enquiries was that they were already operating at full capacity. Some noted that they could not accommodate the demand for spaces as they could not provide the wraparound service that parents wanted – or that parents wanted childcare outside of the provider's operating hours. Some noted that they could have accommodated more places if they expanded their setting, but often added that they could not or did not want to do this because of

⁹ Based on Care Inspectorate Wales register 2021

¹⁰ Providers could select more than one option in the survey.

challenges associated with the planning processes and / or staff recruitment that this expansion would require.

- 4.5 Provider respondents who indicated that they could have accommodated more places if required noted that the reason they had spare capacity was that there simply was not a demand for the spaces they had available. For just over a third of these providers (38 per cent), this was the usual case each year. However, for the remaining 62 per cent, the spare capacity they had was due to a fall in demand this year compared to previous years.
- 4.6 The ability of surveyed providers to accommodate the demand for childcare places they experienced differed according to the type of setting in question. For example, 82 per cent of childminders surveyed noted that they could not accommodate all the requests for places they received during year five, compared to 39 per cent of full day care settings and only 14 per cent of sessional childcare settings. Over half (52 per cent) of childminders noted that they could not accommodate all the demand due to capacity restrictions, compared to 20 per cent of sessional day care settings and 19 per cent of full day care settings. Childminders were also more likely than other childcare settings surveyed to refer to restrictions relating to staffing ratios and their ability to accommodate wraparound care including school drop offs and pickups as reasons they could not accommodate all the demand they experienced.
- 4.7 However, the type of setting is not likely to be the only factor that determines the level of demand for childcare and / or the ability of providers to accommodate it. At least some providers across all setting types surveyed noted examples of spare capacity or a lack of demand for places. It is not possible to determine from the survey data what the other factors influencing demand and ability to meet this demand may be. However, local authority representatives interviewed noted that capacity and demand for childcare varies across geographical areas within their authorities and can be influenced by factors such as accessibility as well as the level of competition to provide places amongst local providers.

Administration tasks

- 4.8 Most surveyed providers (62 per cent) noted that they spent up to an hour each month submitting claims to their local authority to access Offer funding payment. A

quarter of respondents noted that they spent over an hour each month undertaking this task with a minority (three per cent) spending more than five hours each month processing these payment claims. On the other hand, 13 per cent of surveyed providers noted that processing these payments took no extra time.

- 4.9 Providers noted that they spent less time each month processing requests from parents to alter the number of hours or the timing of provision they required through the Offer each month. Over a third (38 per cent) noted that this type of administration did not take up any additional amount of their time each month, while a similar proportion (36 per cent) noted that changing parents' hours took about an hour of their time each month. However, the remaining 24 per cent noted that administrating changes in funded hours required by parents took over an hour each month, while for three per cent of respondents this took more than five hours each month.
- 4.10 Generally, the time surveyed providers spent on administration in year five appear comparable to those recorded in year four. However, the proportion of respondents in year five who reported they spent five hours or more undertaking administration tasks (three per cent) was lower in year five compared to year four – possibly reflecting a reduction in administration requirements following the removal of some of the COVID-19 restrictions that were still in place during year four.
- 4.11 The vast majority of providers (98 per cent) noted that they were able to complete all or at least part of their administration tasks in the language of their choice – (Welsh or English). A small proportion (two per cent) reported that they could not. One Welsh medium provider located in southeast Wales went on to explain that they did not receive any bilingual correspondence relating to the Offer from their delivery authority and were only able to submit administration information to them in English.
- 4.12 As noted in previous Childcare Offer for Wales evaluation reports, the amount, nature and timing of administration tasks required by providers continues to vary depending on which delivery local authority they submit claims to and remains a particular frustration for providers dealing with two or more delivery authorities. The total amount of time spent on administration tasks each month also varies according to setting type. For example, over seven per cent of full day childcare settings noted that they regularly spent over five hours a month on administration

tasks associated with the Offer, compared to approximately one per cent of surveyed childminders – this is not surprising as it also reflects the number of children being cared for across different setting types.

- 4.13 It could be interesting to see whether the introduction of the new digital system helps reduce the current amount of time spent by childcare providers on administration tasks associated with the Offer. This may be particularly interesting for providers who currently access multiple systems but will only need to access one system from August 2023 when the legacy systems close. When asked whether they were aware of the new system, most surveyed providers (62 per cent at the time of asking) noted that they were aware of it and a further 29 per cent were aware of it but did not know much about it. Among the remaining nine per cent, five per cent were not sure whether they had heard about it and four per cent did not know about it at all. Only small variations in the level of awareness of the new system were recorded in responses from providers in different types of settings. However, full day care settings appeared to be slightly more aware and more likely to have heard about the new system from their local authority than respondents who were childminders and those from sessional settings.
- 4.14 It should be noted however, that at the time of asking, local authorities were in the process of informing providers in their areas of the new system, and training and support in how to access and use it was being provided or due to be provided soon. As such, awareness of the new system at the time of writing (October 2022) is likely to be higher than those recorded when the survey was conducted (June / July 2022).

Promoting the Offer

- 4.15 Almost all providers surveyed (97 per cent) promoted the Offer to parents using posters, flyers, social media and face to face discussions. This is consistent with what providers have reported in previous evaluation rounds. Some providers also commented that most of the parents they engage with already knew about the Offer before they informed them of it. This increased level of existing awareness of the Offer is consistent with the findings recorded from year five parents survey – see paragraphs 5.7 to 5.11.
- 4.16 Just under a quarter (24 per cent) of the providers surveyed were aware of parents who were potentially eligible for the Offer but who had not taken up the Offer – this

is consistent with the 25 per cent of providers who noted the same during the year four survey. Reasons for not taking up the Offer also remain consistent with those reported in previous years i.e. that some parents find the application process too complicated – particularly if they are self employed, and / or they feel that accessing the Offer may compromise their eligibility or ability to access other benefits they currently receive.

Provision of wraparound care

- 4.17 Just over half (56 per cent) of providers surveyed noted that they had Offer funded children within their setting who take up an early education place at another setting. Similar responses were gathered from respondents across different settings ranging from 58 per cent of childminders to 50 per cent of full day nursery providers.
- 4.18 Providers who noted that they had Offer funded children who accessed education places elsewhere were asked if they offered any wraparound care for these children. The wraparound care included breakfast and after school clubs, lunchtime wraparound care and / or the transfer of children to and from different childcare and early years education settings. The majority of these providers noted that they did offer wraparound care (ranging from 89 per cent of childminders to 70 per cent of full day nursery settings). A vast majority of these providers (91 per cent) also noted that they provided a pickup / drop off service from early education settings for children receiving the Offer within their setting.
- 4.19 Most providers (68 per cent) noted that providing a drop off / pickup service was very easy, or fairly easy to deliver. Many of those who noted that it was easy to deliver this service said that the early education setting was a short walking distance away, or in some instances, on the same site. Those who noted that providing this service was difficult often referred to cases where children within their care attended early education at different settings or that these settings were at quite a distance from each other.
- 4.20 A higher proportion of childminders, compared to other providers, noted that they used transport to deliver drop off and pickup services (88 per cent of childminders compared to 79 per cent of full day nursery settings and 30 per cent of sessional settings). Among providers who used transport, full day nursery providers and

sessional settings found this most challenging – usually because of the larger number of children that need to be dropped off and picked up within these settings.

- 4.21 These findings are similar to those recorded during year four. The proportion of surveyed providers who noted that they provide wraparound care services during year five (83 per cent) is also higher than the 65 per cent of providers who noted the same pre_COVID-19 pandemic, as recorded in the year two evaluation report. These findings indicate that not only have providers continued to deliver wraparound care after their ability to do so was limited during the period when COVID-19 restrictions were in place¹¹, but that more providers now deliver wraparound care than was the case pre pandemic.

Effect on profitability and sustainability

- 4.22 Surveyed providers were asked whether the Offer had a positive or negative effect on the profitability and sustainability of their business or setting. Most (72 per cent) noted that the Offer had either a strong positive effect, or some positive effect on both the profitability and sustainability of their setting. This is higher than the 66 per cent of respondents who reported the same during the year four evaluation and is also slightly higher than findings recorded during previous years (67 – 70 per cent in year three, and 62 – 65 per cent in year two).
- 4.23 This increase in views that the Offer has a positive effect on profitability and sustainability may be due to the fact that in April 2022 the hourly funding rate for the Offer increased from £4.50 to £5.00.
- 4.24 When asked whether the funding rate of £5 an hour was commercially viable, 77 per cent of year five respondents noted that it was, compared to 67 per cent who noted during year four that the £4.50 rate was commercially viable. As in previous years, not all providers were of the view that the £5 funding rate was commercially viable and, in some cases, was below the rate settings charge fee paying parents.
- 4.25 Although the increased funding rate has been welcomed by the majority of providers, since its implementation, inflation has increased significantly and therefore limited the impact of the increase in real terms. It could be interesting,

¹¹ See year four Childcare Offer evaluation report for examples of delivery changes put in place by providers as a result of the COVID-19 restrictions

therefore, to review satisfaction levels of the £5 rate during year six, following a year where providers have faced higher operating costs.

5. Parents' experiences and impact of the Offer

Parents' experiences and impact of the Offer

Key findings

Accessing the Offer

97% of those surveyed who wanted to access Welsh-medium childcare through the Offer were able to.

Cymraeg

54% of parents accessing the Offer* earned below £26,000 per year.



87% were using formal childcare before accessing the Offer.

Impact on parents



The Offer provides most support and incentive to the employment situation of lower income parents



75% said the Offer made it easier for them to undertake their work.



37% would be working fewer hours had the Offer not been available to them.



86% said the Offer had a positive effect on their welfare.

Icons by Icons8.com

*Source: Childcare Offer for Wales termly monitoring data returns
Childcare Offer Parent Survey. N= 2002.

5.1 This section presents the evidence gathered through an online survey of parents who accessed the Offer (2,002 respondents) between September 2021 and August 2022. It begins by outlining the profile of parents who responded to the survey and the salary profile of parents who accessed the Offer during year five. It then discusses parents' general awareness of the Offer and their views on the application process. The section also reviews any shifts from informal to formal childcare as well as the impact the Offer has had on parents' employment and family wellbeing.

Profile of surveyed parents

- 5.2 Over half (55 per cent) of the year five survey respondents were employed fulltime and 39 per cent were employed as parttime workers. Among the remaining six per cent, five per cent were self employed or freelancers, while just over one per cent were employed on zero hour contracts and 0.1 per cent were apprentices. Most respondents (87 per cent) noted that they had a spouse or partner who also worked. A higher proportion of respondents' spouses or partners (78 per cent) were employed fulltime compared with the respondents themselves, and a lower proportion (six per cent) were employed parttime. Some (15 per cent) of respondents' spouses or partners were self employed or freelancers, with less than one per cent employed on zero hour contracts or employed as an apprentice.
- 5.3 The type of childcare provision accessed through the Offer by parent survey respondents has remained relatively consistent in recent years. In a typical week during school term, most year five survey respondents (57%) noted that they used the Offer funding to access childcare provision from a private day care nursery. Almost a third (29 per cent) noted that they used the funding to access sessional day care including play groups and Cylch Meithrin; and 13 per cent used the Offer to access the services of a childminder. Other formal childcare accessed through the Offer by survey respondents included creches (three per cent) and open access play provision (0.5%).
- 5.4 These proportions are almost identical to those recorded during the year four parents survey. The only notable exception being the proportion of parents who noted that they used the Offer to access out of school childcare (e.g breakfast club, after school club, holiday provision) – 16 per cent noted that they accessed

this form of childcare through the Offer during 2021-22 compared to 14 per cent during the previous year. This proportional difference is relatively small and may reflect the fact that parents could not always access out of school provision during the COVID-19 restrictions that were in place during large parts of 2020 – 21. On the other hand, such a small variation may simply reflect slight changes in the preferences or choices of year five parents surveyed compared to those surveyed in year four.

Salary profile

- 5.5 Parents were asked to answer questions on their income and 52 per cent of parent respondents noted that they earned an income of less than £26,000 per annum – this is comparable to the income profile of all parents accessing the Offer. [See table 5.1 below].

Salary profile of parents accessing the Offer

- 5.6 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 (includes both parents in a two-parent household) at the point of applying for the Offer between September 2021 and August 2022.
- 5.7 Analysis of this data reveals that the median annual gross salary band of individuals accessing the Offer between September 2021 and August 2022 was £20,800 - £25,999. This is lower than the national average full-time salary of £29,312 per annum in 2021, recorded by the Annual Survey of Hours and Earnings (Office of National Statistics).¹² It is also consistent with the previous four 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.
- 5.8 Table 5.1 shows that over half (at least 54 per cent) of parents accessing the Offer earned below the national average annual salary level for full-time workers. Furthermore, just over a quarter (26 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

¹² Stats Wales [Average \(median\) gross weekly earnings by UK country - English region and year \(£\)](https://gov.wales) (gov.wales) [Accessed on 13th January 2023]

the previous four-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 2021 and August 2022

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

N=36,659

Source: Survey of providers delivering the Offer

Parents' general awareness of the Offer

- 5.9 The majority of parents surveyed during year five (72 per cent) were already aware of the Offer before they were eligible for it – this is a similar proportion of parents who noted the same during the year four evaluation (75 per cent). This indicates good continued general awareness of the Offer amongst parents who apply for it.
- 5.10 During the fifth year of the Offer in Wales, various marketing campaigns were run to increase awareness of its availability. Survey respondents were asked whether they had seen any of them. The findings are summarised in table 5.2 below.
- 5.11 Over a quarter of respondents had seen or heard at least one of the marketing campaigns, with the highest proportions having seen the Wales Online adverts and the poster displays in playcentres. For six per cent of survey respondents, one of these marketing campaigns was the way in which they first became aware of the Offer.

Table: 5.2: Awareness of the Offer marketing campaigns

Campaign	% of parents who had seen campaign
Mumsnet/Netmums	4.0
Wales Online	11.0
Advert on Google	4.6
Radio adverts	5.4
Poster displayed in a playcentre	11.2
Advert on S4C (online or on television)	4.3
Asda Mail Outs	0.1
None of the above	71.0

Source: Year five CCO parents' survey (*n* = 1915)

Note: 87 survey respondents did not answer this question

- 5.12 Gaining information directly from childcare providers remains one of the main ways in which surveyed parents become aware of the Offer. However, the proportion of parents surveyed during year five who first heard about the Offer from their existing childcare provider is slightly lower than the proportion recorded in previous years (42 per cent in year five compared to 53 per cent in year four and 48 per cent in year three). On the other hand, the proportion of respondents who noted that they first heard about the Offer through word of mouth was higher during year five than in previous years (41 per cent in year five compared to 37 per cent in year four and 32 per cent in year three). This indicates that general awareness of the Offer amongst parents is increasing and that parents are sharing information about the Offer with each other.
- 5.13 Other awareness raising activities have also contributed to parents' awareness of the Offer including direct contact and contact made by local authorities using social media, with 17 per cent of survey respondents noting that they first became aware of the Offer in this way. Becoming aware of the Offer from information provided by employers, however, remains relatively low, with only three per cent of respondents noting that they first heard about the Offer from their employer – this is consistent with the evaluation findings recorded for years three and four.

Application process

- 5.14 Similar to the findings recorded in the year three and four evaluations of the Offer the majority of parents surveyed during year five (81 per cent) considered the application process to be either very easy (33%) or fairly easy (48%). The proportion of survey respondents who noted that the application was fairly difficult (nine per cent) or very difficult (two per cent) is also consistent with findings from the year three and four evaluations.
- 5.15 The vast majority of survey respondents completed the application form in English (91 per cent) with six per cent having completed the application in Welsh and the remaining three per cent in Welsh and English. Almost all respondents (99 per cent) noted that they were able to complete the application in the language of their choice. Fewer than 1 percent of respondents noted that they could only complete most / some, but not all of the application form in their language of choice, and only 0.1 per cent noted that they could not complete any of the application in the language of their choice.
- 5.16 Of the surveyed parents who said they found the application process difficult, the main reasons given were the amount of time it took and the challenges associated with providing the required accompanying documentation. This is, again, similar to the findings recorded in previous evaluations. However, a higher proportion of respondents who had found the process difficult found specific aspects of the process challenging during year five than has been the case in previous years. For example, (54 per cent compared to 49 per cent in year four) considered the application process to be time consuming and (54 per cent of year five respondents compared to 45 per cent in year four) noted that they found it difficult to provide the required accompanying documentation as proof of eligibility.
- 5.17 A higher proportion of year five respondents who found the application process difficult (49 per cent compared to 40 per cent in year four) noted that the application form itself was difficult to find and 26 per cent in year five (compared to 21 per cent in year four) noted that they had technical difficulties with their local authority's online application process.
- 5.18 For half of the survey respondents (51 per cent), the application process took less than an hour to complete and just over a third (35 per cent) noted that it took

between one and two hours. However, for nine per cent of respondents, the application process took over two hours to complete, and for five per cent it took more than a day.

- 5.19 Most survey respondents (75 per cent) completed the application process without the support of anyone else. The remaining 25 per cent did receive at least some support from their delivery local authority. In most of these cases, the level of support required took less than an hour. However, a small number of survey respondents (just over one per cent) noted that they required two hours or more of support from their local authority, with a further one per cent noting that they required more than a day's support from their local authority to complete the application. Although this is a small proportion, in real terms (assuming this reflects the level of support required across all parents who applied for the Offer during this period) this equates to 217 parents who require more than a day's support from the local authority to complete the application. Providing this level of support alongside all the other application support needed, is likely to require considerable time and resource.
- 5.20 Overall, the findings indicate that the proportion of all survey respondents who noted that they encountered difficulties applying for the Offer (approximately 10 per cent) has remained consistent over recent years. However, among those who have encountered difficulties, more found the application form difficult to find, considered the process to be time consuming, had difficulty providing the required accompanying documentation and encountered technical difficulties, than has been the case in previous years. Uploading three months of payslips for parents who get paid weekly was also reported as a time consuming challenge by some parents. This suggests that for a minority of parents, the application process has become more challenging during the last year. It could be interesting to review whether these challenges are eased or further increased following the rollout of the new national digital system during 2022 – 23.

Speed of processing

- 5.21 The year four evaluation report outlined that in August 2020 applications for the Offer were reopened after they had been suspended due to COVID-19. As a result, delivery local authorities had to process a backlog of applications from two cohorts of parents within a short time frame which created some delays in approving applications in September 2020. Parents surveyed in year five were

asked whether they had encountered similar delays in September 2021. The vast majority (96 per cent) noted that they had not encountered any delays.

- 5.22 The delays experienced by the relatively small proportion of year five parents' survey respondents were mainly as a result of application challenges noted above as opposed to the capacity of the local authorities to process application forms as had previously been the case. However, a small number of the surveyed parents who had experienced delays noted that this resulted in them having to pay for childcare that would otherwise have been funded during that period.

Entitlement (including school holidays)

- 5.23 Survey responses showed that many parents (39 per cent of those surveyed in year five) remain uncertain about the number of hours that are funded during school holidays. Comments offered by surveyed parents suggested that this uncertainty not only reflects knowledge and information about the school holiday provision that parents are entitled to as part of the Offer, but also uncertainty in relation to specific arrangements and capacity of individual settings to provide childcare during school holidays.

Confirming eligibility

- 5.24 Random eligibility 'spot checks' are carried each year by delivery authorities whereby, whilst already accessing the Offer, parents are periodically asked to confirm that they are still eligible for the Offer. Most (59 per cent) of those parents who responded to the survey had been asked to provide documentation to confirm their eligibility. Of these parents, a high majority (87 per cent) noted that confirming their eligibility was straightforward. However, 13 per cent said they had experienced challenges in doing this. These proportions exactly replicate those recorded during the year four parents survey.
- 5.25 Surveyed parents who noted that they had experienced challenges reconfirming their eligibility referred mainly to the inconvenience of having to essentially repeat the application process, which, as noted above, some found challenging the first time. A few parents had been asked to confirm or reconfirm their eligibility twice in one year – which they considered excessive.

Move from informal to formal childcare

- 5.26 Of the 2,002 parents who completed the year five survey, most (87 per cent) had already been using formal childcare before accessing the Offer. This is almost exactly the same proportion of parents who noted the same during the year four survey (88 per cent) but slightly lower than the earlier evaluations of the Offer (year three, 93 per cent; year two, 89 per cent; and year one, 94 per cent). This indicates that over the five years that the Offer has been delivered, the proportion of parents who were not accessing formal childcare prior to being eligible for it has gradually increased – possibly reflecting increased awareness of its availability among a wider group of parents.
- 5.27 Year five parents surveyed were asked how many hours of childcare they were using in a typical week prior to accessing the Offer and how many they used while they accessed the Offer. The average hours of weekly childcare (formal and informal) used by parents increased by 1.5 hours when they accessed the Offer.
- 5.28 The average weekly hours of formal childcare accessed by surveyed parents prior to accessing the Offer was 22.2. This increased to an average of 27.5 hours while accessing the Offer (with an average of 19.2 hours being funded through the Offer and the remaining 8.3 hours self funded by the parents).
- 5.29 The average number of informal childcare hours used prior to accessing the Offer was 11.3 and fell to 7.5 while accessing the Offer. Access to the Offer during year five therefore increased overall demand for childcare and also shifted the demand away from informal towards formal. This is as expected and in line with the findings reported in previous years.
- 5.30 Over a third (39 per cent) of parents who responded to the year five survey indicated that they would be using the same number of hours of formal childcare even if the Offer did not exist. This is slightly lower than the 44 per cent of survey respondents who reported the same in the year four parents' survey. Almost a third of year five respondents (32 per cent) - compared to 28 per cent of year four respondents - noted that they would have used fewer hours of formal childcare in the absence of the Offer. This suggests that during year five, the Offer has enabled or encouraged more parents who would be accessing formal childcare anyway to increase their use of formal childcare than has been the case in previous years.

- 5.31 The proportion of year five surveyed parents who indicated that they would not have used any formal childcare without the Offer (11 per cent) is the same as the proportion who noted the same during the year four evaluation. Over a third (38 per cent) of surveyed parents also noted that in the absence of the Offer their child(ren) would have spent more time being looked after informally by family and friends – further confirming the shift from informal to formal childcare generated by the Offer.
- 5.32 The survey findings indicate that the increased use of formal childcare, as well as the shift from informal to formal, is larger amongst lower income respondents compared to higher earning respondents. For example, 15 per cent of surveyed parents who earned less than £26K a year noted that their child would not be accessing any formal childcare without the Offer compared to only six per cent of parents who earned £26K a year or more. This is again in line with findings recorded in previous evaluations and further confirms that the Offer supports lower income families to access formal childcare to a greater extent than those on higher incomes.

Additional charges

- 5.33 Since the launch of the Offer in 2017, many of the childcare providers have introduced additional charges for items and services provided during funded hours, that are not covered within the Offer's funding rate. The findings of the year three evaluation survey of providers outlined that just under a quarter of participating providers introduced additional charges for meals, snacks and transport; the year five survey findings indicate that this has now increased to 44% of providers.
- 5.34 There was some initial uncertainty whether providers could or should place these additional charges on parents. Over recent years the Welsh Government has issued guidance for providers outlining what they can and cannot charge for in addition to the Offer funding they receive. The guidance has also encouraged providers to be transparent about the things they charge for by itemising them on bills issued to parents. The conditions agreed between the Welsh Government and providers require those providers to ensure that the same charges are placed upon parents who fund the provision through the Offer and those who pay for the provision themselves.

5.35 The year five evaluation findings indicate that just over half of the surveyed parents who access the Offer paid regular additional charges. These are mainly for charges for meals, snacks and transport, which are in line the Welsh Government's charging guidance. However, of the surveyed providers who noted that they did include additional charges for parents, over a quarter (28 per cent) noted that they only placed these additional charges on parents supported by the Offer. In addition, a small minority of parents' survey respondents noted that they paid additional fees on top of their Offer funded hours each month, but they did not always know what these were for. These findings suggest that not all providers are administering additional fees to parents funded by the Offer in a way that complies with the Terms and Conditions of delivering the Offer.

Welsh medium provision funded by the Offer

5.36 Overall, parents' survey responses suggest that almost all parents who wanted to access Welsh medium childcare provision during year five were able to do so (97 per cent in year five compared to 93 per cent in year four). A small proportion (three per cent in year five compared to seven per cent in year four) wanted to access Welsh medium provision but were not able to do so.

5.37 Reasons for not being able to access Welsh medium provision in year five were similar to those recorded in year four, mainly a lack of availability of local provision, in some specific areas (e.g. south east Wales) or that local provision – typically a Cylch Meithrin – did not provide wraparound care, making the logistics of drop offs and pickups challenging for parents.

Impact of the Offer on parents' employment

5.38 The evaluation aims to understand the extent to which the Offer has made a difference to parents' employment opportunities through reducing childcare costs as a barrier to employment. Just over half of parents surveyed in year five (52 per cent) noted that their employment situation would be the same or very similar to what it currently was even if they had not been able to access the Offer. More than three quarters of survey respondents (76 per cent) noted that the employment situation of their spouse or partner would be the same. However, over a third of respondents (37 per cent) noted that without the Offer they would be working

fewer hours and a further 10 per cent said they would be in a job with fewer career progression opportunities. The same proportion, 10 per cent said they would not be working at all and a further nine per cent thought they would be working in a job with lower pay. These findings indicate that the Offer does continue to support many parents to maintain or improve their employment situation. This is particularly true amongst lower income parents. For example, 42 per cent of parents who earned less than £26K a year noted that they would be working fewer hours without the Offer compared to 32 per cent of respondents who earned £26K or more per year. Over 15 per cent of respondents who earned less than £26K a year noted that they would not be in work if the Offer was not available to them compared to only four per cent of parents earning £26K a year or more.

- 5.39 On the other hand, the Offer supported a larger proportion of higher income surveyed parents to gain or maintain better paid employment and or employment that offers better career progression. For example, 10 per cent of the higher earning parents (earning more than £26K a year) noted that they would be working in a lower paid job without the support of the Offer (compared to seven per cent of lower income respondents); and 13 per cent of the higher income parents (compared to eight per cent of lower income parents) noted that without the Offer they would be on a career path with fewer opportunities for progression.
- 5.40 The year five findings indicate that the Offer provided some parent survey respondents with an incentive to increase the number of hours they work (48 per cent) and / or to change jobs (21 per cent) – even if the opportunity to do so had not yet arisen. For 21 per cent of respondents, the Offer also provided at least part of the incentive they needed to start or return to work. Again, these incentives were strongest among lower income respondents (i.e. those who earned £26K or less). For example, 56 per cent of lower income respondents, compared to 26 per cent of higher income respondents, noted that the Offer provided them with an incentive to increase the number of hours they work.
- 5.41 Parent survey respondents noted that the Offer had provided less of an incentive to encourage their spouse or partner to change their working arrangements. For example, only 14 per cent of respondents noted that the Offer had incentivised their spouse or partner to change their job compared to 21 per cent of respondents themselves. However, the survey findings also indicate that on average, respondents' spouse or partner were the higher earners within the household, and

therefore their level of incentivisation reflect the responses noted above from higher income respondents.

- 5.42 Overall, these findings indicate that the Offer is providing the most support and incentive to the employment situation of lower income earning parents. These findings match those reported in previous evaluations and provide evidence that the Offer is meeting the employment support aims upon which it was established.

Impact of the Offer on family wellbeing

- 5.43 The evaluation aimed to understand the extent to which the Offer made a difference to families' wellbeing, as well as their financial situation. A high majority (86 per cent) of year five surveyed parents agreed, or agreed to an extent, that accessing childcare had a positive effect on their own and/or their partner's wellbeing (this is similar to the 88 per cent of parents who noted the same in the year four survey). Almost all (95 per cent) of year five respondents noted that the Offer reduced the financial burden of childcare and 75 per cent noted that the Offer made it easier for them to undertake their work than would otherwise have been the case.
- 5.44 A majority (83 per cent) of year five parents surveyed noted that the Offer helped reduce the stress of having to organise care for their child(ren) – this is similar to the 85 per cent of parents who noted the same during the year four survey. The vast majority of parents also reported positive effects that formal childcare accessed through the Offer had on the social development of their child(ren) through having the opportunity to interact and play with other children at the childcare setting (93 per cent in year five, almost identical to the 94 per cent recorded in year four). The majority (84 per cent) also noted that the formal childcare funded by the Offer positively influenced their child's ability to manage feelings and other aspects of behaviour development (slightly lower than the 87 per cent who reported the same in year four). A high majority, 86 per cent (similar to the 87 per cent for year four) recognised the positive effect on their child's cognitive skills, including language development; 78 per cent referred to benefits associated with the health and fitness of their child and 65 per cent referred to improved progression towards being toilet trained.

6. Conclusions and recommendations

- 6.1 The conclusions and recommendations presented in the following sections draw on the year five evaluation findings presented in the main body of this report.

Delivery and take up of the Offer during September 2021 and August 2022

- 6.2 Take up of the Offer in Wales between September 2021 and August 2022 appears to have returned to pre COVID-19 pandemic levels. However, the level of take up has not been consistent across all local authority areas. Although most local authorities have seen a consistent or even an increasing level of take up in their area, some have seen a decline. It is not clear from the evaluation findings why take up has fallen in some areas, although views gathered from local authority representatives indicate that factors could include the ability or capacity of local authorities to engage with and raise awareness of the Offer amongst eligible parents as well as, in some instances, the ability of local providers to provide all the wrap around care eligible parents might require.

Recommendation – The Welsh Government and local authorities that have experienced falls in number of eligible parents that take up the Offer in their area should consider undertaking further research to gain a detailed understanding of the reasons for this.

The year five findings indicate that awareness of the Offer prior to the point when they are eligible for it, remains quite high amongst most eligible parents. The year four evaluation report included a recommendation that *‘the Welsh Government should consider broadening the national communication campaign of the Offer to further promote the Offer.’* Promotional campaigns were introduced in year five of the Offer and survey findings indicate that many parents first become aware of the Offer through these promotional campaigns. Some of the feedback from local authority representatives suggests however, that alongside national campaigns direct engagement with parents on a local level also remains an important factor in encouraging take up of the Offer. Findings also suggest failure to offer direct engagement with parents on a local level may negatively affect the take up.

Recommendation – The Welsh Government should consider running similar promotional campaigns during year six as those delivered in year five – particularly the Wales Online adverts and posters that can be displayed in playcentres.

Recommendation – The findings indicate that direct engagement with eligible parents, in order to raise their awareness of the Offer, remains an important aspect of ensuring good take up of the Offer on a local level. The Welsh Government should therefore ensure that local authorities have sufficient capacity to enable them to continue to deliver the engagement required in their area each year.

Administration

- 6.3 The vast majority of parents surveyed as part of the year five evaluation, completed their Offer application forms quite easily. However, some parents continue to experience challenges, and this may be putting some eligible parents off applying for the Offer. As in previous years, some parents, particularly self employed parents, find it difficult to produce all the eligibility evidence required. In addition, an increasing proportion of parents surveyed during year five also reported challenges in finding the application form online and / or technical problems uploading their proof of eligibility documents on to local authority online platforms. As the application system is moving increasingly towards a digital / online system, it will be important to review during year six whether these access and interaction challenges are resolved, or whether they increase.

Recommendation – The Welsh Government should aim to gather feedback from parents applying for the Offer on the new digital system from November 2023 onwards. The feedback gathered should be used to review whether parents' access to the new system, and their interaction with it, is easier or more challenging than has been the case for those who applied for the Offer on the existing system.

Funding rate

- 6.4 In April 2022, the funding rate offered to childcare providers delivering Offer funded childcare increased from £4.50 an hour (the rate originally set when the Offer was launched in 2017) to £5.00 an hour – an 11 per cent increase. A majority of providers were happy with this increased funding rate and the proportion of providers who noted in year five survey responses that the rate was commercially viable for them (77 per cent) is the highest recorded since the Offer was launched.
- 6.5 However, as in previous years, not all providers surveyed in year five were of the view that the funding rate was high enough. Some providers and local authority representatives also noted concerns that the current economic climate of high inflation and increasing costs of living, may soon erode in real terms the financial benefits gained by providers from this funding increase.

Recommendation – The increased funding rate has been welcomed and has strengthened the profitability and sustainability of many childcare providers currently delivering the Offer. However, in light of the current economic climate, the Welsh Government may need to further review the rate during year six with a view to possibly considering further increases in the rate.

Additional learning needs (ALN)

- 6.6 Demand for ALN support funded through the Offer appears to have increased during year five. There are likely to be two factors driving this increase in demand. The first is the introduction of relatively new ALN legislation which makes it easier to identify and confirm the additional learning support needs of children. The second is that the negative effect that COVID-19 lockdowns had on the social and behavioural development of some children has increased the number of three and four year olds who require ALN support. The net result appears to be increased spending, and in some cases over spending of the Additional Support Grant (ASG) across most, but not all, local authorities.
- 6.7 If the increased demand for ALN support witnessed in year five, is driven mainly by child development issues resulting from COVID-19 lockdowns, then it is likely that the demand for additional support for three and four year olds may fall again, now post pandemic restrictions have been lifted. However, if the increased demand is driven mainly by the introduction of the ALN legislation, then it is possible that

current demand levels for ALN support for children supported by the Offer may continue at year five levels into future years.

Recommendation – The Welsh Government should consider undertaking further research to determine the main factors currently pushing up demand for ALN support. The findings of this research should be used to guide future funding strategies and guidance to support the ALN needs of children supported by the Offer.

Recommendation – The Welsh Government may need to review the allocation of ASG made available to local authorities to ensure that it is sufficient to meet the ALN needs of children supported by the Offer.

Impact of the Offer on employability, wellbeing and disposable income

- 6.8 When the Offer was first piloted in 2017, its core policy aim was to support parents by reducing or removing the cost of childcare as a barrier to their employment prospects. Year five findings outline that the Offer continues to support many parents, particularly low income parents to maintain or improve their employment situation. However, it is not only the employment prospects of low income parents that the Offer supports. Year five parents' survey findings indicate that the Offer also supports many parents on higher income levels (over £26,000 per annum) to gain or maintain better paid employment and or employment that offers better career progression.
- 6.9 These findings match those reported in previous evaluations and provide further evidence that the Offer is meeting the employment support aims upon which it was established.
- 6.10 A high majority of surveyed parents in year five reported that they gained positive wellbeing outcomes as a result of accessing the Offer. As well as improved household income as a result of lower childcare costs the majority of parents reported that their child(ren) gained positive social behavioural and learning development by accessing the formal childcare that was funded by the Offer. This again is in line with findings reported in previous Childcare Offer evaluations.

Availability of childcare provision to meet demand

- 6.11 The year four evaluation report concluded that COVID-19 had a considerable impact on the childcare sector in Wales and created a significant risk to future viability of many settings. However, the considerable financial support¹³ provided to the sector by the Welsh Government during 2020 ensured that the financial viability of the sector as whole appeared to be *'reasonably stable'*, albeit precarious for many providers. The increase in funding rate to deliver the Offer, introduced during year five (in 2022), has provided further financial stability for many providers, although for reasons noted above it is uncertain how long this increased stability will last.
- 6.12 Year four findings also indicated that the biggest challenge facing the sector at that time was staff retention, recruitment, and general morale of the childcare sector workforce. Local authority representatives interviewed noted that staff recruitment and retention remain challenges in many areas as childcare workers can often find better paid employment elsewhere – outside of the sector.
- 6.13 Overall, however the year five findings indicate that the demand for Offer funded places has been met by available supply. This is also true for different types of provision – e.g. Welsh medium provision with the vast majority of surveyed parents who wanted to access Welsh medium provision through the Offer were able to do so. However, the number of providers who noted that they could not accommodate all the demand for places they received remains high for settings in some geographical areas – particularly amongst childminders. This alongside diminishing numbers of registered providers suggests that the sector does not have much 'slack' to accommodate additional demand. This is a point that may need to be considered further in year six as the eligibility criteria for the Offer expands to include parents in education.
- 6.14 The year four evaluation report included a recommendation that the Welsh Government should consider *'implementing further employment programmes aimed specifically at encouraging and supporting individuals to work in the childcare sector in Wales'*. The year five findings suggest that this recommendation remains valid.

¹³ 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.

Recommendation - the Welsh Government and local authorities should review the data gathered in the Child Sufficiency Assessments to assess whether there is sufficient provision available to meet potential increases in demand resulting from extending eligibility for the Offer to a wider group of parents.

Annex A: 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 Childcare Offer. We are interested in your views of the childcare received in the period from September 2021 onwards.

We understand that many families will access different types of provision for care and early years education for their children. When answering the questions in this survey, please take into account only the childcare funded through the Childcare Offer and not any early education (such as the 10 hours or so in school) or any childcare that you pay for by yourself.

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, please contact: Sioned Lewis on Childcare@research.arad.wales.

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 2021 and July 2022? *

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 2021 and July

2022. 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 2021/22, 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 2021/22, 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 2022, 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 2022, 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. There have been marketing campaigns to promote the Childcare Offer. Did you see any of the following?

Mumsnet/Netmums

Wales Online

Advert on Google

Radio adverts

Poster displayed in a playcentre

Advert on S4C (online or on television)

Asda mail outs

None of the above

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

One of the campaigns listed above

School

Local Authority information (direct contact or social media)

Your employer

Current childcare provider

Word of mouth

Job Centre, PaCE adviser or Communities for Work advisor

Other (please specify):

13. 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.

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

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

15. Did you experience any of the following difficulties when applying for the Childcare Offer?

- The application form was difficult to find
- I had technical difficulties with an online application process
- It was time consuming completing the application
- The 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.
- The 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 it took you):

16. How much time did you spend completing your application for the Childcare Offer? Please include all of the time it took for the initial application form and for any follow up questions from the local authority.

- Less than one hour
- Between one and two hours
- More than two hours
- More than one day

17. When making your application, did you receive any support from your local authority? This could include support with general queries and support over the phone.

- I received no support from my local authority.
- I received support from my local authority for around an hour.
- I received support from my local authority for between one and two hours.
- I received support from my local authority for more than two hours.
- I received support from my local authority for more than one day.

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

- English
- Welsh
- Both English and Welsh

19. 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:

20. 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):

21. When applying for the Childcare Offer, was it clear to you how many hours of childcare would be funded by the Offer during school holidays?

- Yes
- No
- Don't know

Please provide more details:

22. Since September 2021, have you encountered any delays in being able to take up the Childcare Offer?

Yes

No

23. 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)

24. 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

25. 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?)

26. 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

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

Yes

No

28. 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.

29. What is your current employment status?

- Employed - full-time
- Employed - part-time
- Employed - zero hours contract
- Self-employed / Freelance
- Apprentice

30. 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"/>

31. 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

32. 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

33. 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

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

Yes

No

35. 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

36. 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 start working or return to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

37. 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

38. 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

39. 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

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

- Yes
- No
- Don't know

If yes, please provide examples:

41. 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:

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

- Yes
- No
- Don't know

Please explain your answer:

43. 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	<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
own and/or my partner's wellbeing.						
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:

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

	Positive	No change	Negative	Not 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 aspects of social development)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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"/>

Positive

No change

Negative

Not sure / Don't know

Health and fitness

Please use the space below to expand on your response if you wish

45. 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 as 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 through the Offer 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

46. 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

To pay credit card bills
on time

To keep my home in a
decent state of
decoration

To take a holiday for at
least one week a year

Please explain your answers:

47. 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

Please explain your answers:

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



Providers Survey

The Welsh Government has commissioned Arad Research to undertake an evaluation of the Childcare Offer as well as a review of childminding in Wales. Your responses to this survey will help inform the Welsh Government's future childcare and Childcare Offer for Wales plans and policies.

If you have provided childcare funded by the Childcare Offer for Wales, you will be asked to complete questions of your views and experiences of providing childcare funded by the Offer. This part of the survey will take approximately 10 to 12 minutes to complete

If you are a childminder, you will also be asked some initial questions about your experience of working as a childminder. This will take between 2 and 5 minutes to complete.

If you are a childminder and you do not provide childcare funded by the Childcare Offer, you will only be required to complete the first part of the survey about your work as a childminder.

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 at childcare@research.arad.wales.

1. What type of childcare 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.

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

3. How long have you been a childminder?

Less than 12 months

1-3 years

4-6 years

7-9 years

10 years or more

4. What are your plans over the next 5 years?

Plan to:

continue working as a childminder

leave childminding in next 12 months

leave childminding in next 1-2 years

leave childminding in next 3-4 years

leave childminding in next 5 years

Don't know

5. If you plan to leave your current work as a childminder within the next 5 years, what do you plan on doing next?

Work in another job in the childcare sector

Work in another job outside of the childcare sector

Retire

Return to education

Don't know

Other (please specify):

6. On a scale of 1-5, where 1 is not a challenge at all and 5 is a considerable challenge, please rate your experience of dealing with the following aspects of managing your childminding setting / business?

	1 = not a challenge at all	2	3	4	5 = a considerable challenge	Not applicable
Accessing training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not being able to accommodate / meet the high demand for childcare places I have available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low demand / not being able to fill the childcare places I have available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Costs and expenses of running my childminding business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessing business support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planning permission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please use the space below to explain your answers or to note any other challenges

7. Thinking about these same operating and management requirements, have they become easier or more challenging over the past 3 years?

	Easier	More challenging	No change	Not applicable
Accessing training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not being able to accommodate / meet the demand for childcare places I have available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low demand / not being able to fill the childcare places I have available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Costs and expenses of running my childminding business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessing business support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planning permission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please use the space below to explain your answers if you wish:

8. On a scale of 1-5, where 1 is not a challenge at all and 5 is a considerable challenge, please rate your own experience of working as a childminder?

	1 = not a challenge at all	2	3	4	5 = a considerable challenge	Not applicable
Level of income earned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	1 = not a challenge at all	2	3	4	5 = a considerable challenge	Not applicable
Hours worked each day / week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Career progression opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of paperwork and administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The need to use IT/ a computer / internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please use the space below to explain your answers if you wish:

9. Thinking about these same experiences of working as a childminder have they become easier or more challenging over the past 3 years?

	Easier	More challenging	No change	Not applicable
Level of income earned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hours worked each day / week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Career progression opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of paperwork and administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The need to use IT/ a computer / internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please use the space below to explain your answers if you wish:

10. If you're willing to provide further feedback about your views and experiences of working in the childcare sector, please provide your contact details below.

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

11. Has your setting delivered any childcare funded by the Childcare Offer for Wales since September 2021?

[The Childcare Offer for Wales: Help with childcare costs for working parents of 3 to 4 year olds] *

Yes

No

The rest of the questions are about the Welsh Government-funded Childcare Offer from September 2021 onwards.

You have indicated that your setting has not delivered any childcare funded by the Childcare Offer for Wales since September 2021. If this is correct, select 'Next Page', otherwise please select 'Previous Page' and amend your answer.

12. 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

13. 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):

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

	Number of children
Total number of children using your service	<input style="width: 50px; height: 30px;" type="text"/>
Number of children who use this service on a full-time basis	<input style="width: 50px; height: 30px;" type="text"/>

Number of children

Number of children who use this service on a **part-time** basis

Number of children who use the service on an **ad-hoc** basis

Average number of children using your service **per day**

Total number of children supported through the **Childcare Offer** between September 2021 and August 2022

Total number of children supported through the **Childcare Offer** who were **new customers** between September 2021 and August 2022

15. Over the last 12 months, have you / your setting been able to provide spaces for every parent who has requested childcare provision? Please consider all enquiries, not just those for the Childcare Offer.

Yes

No

Don't know

16. If Yes – was there a specific reason for this:

The demand for childcare places is lower this year than it has been in the past

The setting always has some spare capacity

Other (please specify):

17. If No – what was the reason for this?

- The setting is at maximum capacity, and we do not want to expand
- The setting is at maximum capacity, and we would like to expand, but cannot find staff
- The setting is at maximum capacity, and we would like to expand, but do not have space on the premises
- Don't know
- Other (please specify):

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

	No extra time	Up to one hour	1-2 hours	2-5 hours	5+ hours
Registering as a provider to deliver the Offer	<input type="checkbox"/>				
Submitting claims to the Local Authority for payment	<input type="checkbox"/>				
Processing requests from parents to alter the amount of hours or timing of provision	<input type="checkbox"/>				

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

19. 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.

20. Are you aware of the new national digital service for the Childcare Offer?

- Yes
- No
- Not sure
- I have heard about it but I don't know much about it
- Other (please specify):

21. If you have received information about the new national digital service, where did you get this information from?

- I have not received any information
- From my local authority
- From Care Inspectorate Wales (CIW)

A direct email (please specify from who in the box below)

Social media

A newsletter

Other (please specify):

Please use the space below to provide any additional information

22. Do you promote the Offer to parents?

Yes

No

If yes, how do you promote? E.g. posters, meetings. If no, please tell us why this is.

23. 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

24. 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

25. 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

26. 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.

27. 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?

28. Do you have Childcare Offer funded children at your setting who take-up an early education place at a different setting?

Yes

No

Don't know

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

Yes

No

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

30. Do you provide a pick-up / drop-off service from early education settings for children aged 3 and 4 receiving the Offer within your setting?

Yes

No

Please provide details:

31. 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:

32. 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:

33. 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:

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

Yes

No

35. Have you recently made, or are you planning to make any changes to the early education provision (previously called Foundation Phase Nursery) at your setting?

We have started offering early education provision

We are planning to offer early education provision

We have stopped offering early education provision

We are planning to stop offering early education provision

No changes planned

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

	Yes	No
Extend opening times/hours during term time	<input type="checkbox"/>	<input type="checkbox"/>
Decrease the opening times/ hours during term time	<input type="checkbox"/>	<input type="checkbox"/>
Extended hours / Opened during school holidays	<input type="checkbox"/>	<input type="checkbox"/>
Decreased hours / Shut during school holidays	<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"/>
Decrease childcare provision for younger children (under 3) and/or older children 5+	<input type="checkbox"/>	<input type="checkbox"/>

If 'Yes' to making any changes, what were the reasons for this

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

Yes

No

38. 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)

39. Do parents supported by the Childcare Offer pay for childcare provision available during the 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 these weeks.

Parents have a **contract** with us for the year and are charged **half fees** for these 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 up to 4 weeks or more** a year and so we **don't charge** parents for those weeks.

Our setting is **closed for 4 weeks or more** a year but we **charge parents full fees / half fees** for those weeks.

Other (please specify)

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

40. 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
- Not 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

41. 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:

42. Is the payment of £5 an hour to provide childcare through the Childcare Offer a commercially viable option for you?

- Yes
- No

Please explain your answer:

43. 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:

44. 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):

45. 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

46. 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:

47. To what extent have you faced challenges over the past year in relation to each of the following factors?

	Significant challenges	Some challenges	No challenges	Not applicable
Your setting's profitability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to support children with additional learning needs (ALN)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to recruit suitably qualified staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to retain staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offering flexible childcare (e.g wraparound, extended hours)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional information:

48. Since September 2021, has your setting had to temporarily close due to Covid-19?

Yes

No

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

Yes

No

Don't know

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

Local authority

Business Wales

Sector representative body e.g. Cwlwm, NDNA, Mudiad, Pacey

Social Care Wales

Another childcare provider

Not sure

Other (please specify):

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

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

53. 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:

Annex B: Privacy Notices

Local Authority Focus Groups and Interviews

The Welsh Government has commissioned Arad Research to undertake an evaluation of the fifth year of the Childcare Offer for Wales. The aim of the evaluation is to assess the performance of the Childcare Offer and help Welsh Ministers make decisions about the Offer.

As part of this evaluation, Arad Research will be gathering information through focus groups and interviews with Local Authority officials. The aim of this is to understand the organisational structures and processes Local Authorities use to deliver the Childcare Offer and other issues such as capacity in the childcare sector to deliver the Offer and alignment with early education and other schemes.

The information collected during the evaluation will be included in a report published on the Welsh Government website, and possibly other publications, by *Arad Research* and the Welsh Government. You will not be identifiable from the report, as all comments will be anonymised.

The Welsh Government is the data controller for the evaluation. However, *Arad Research* will delete any personal data provided during interviews, and anonymise the raw data, before it is shared with the Welsh Government.

Participation is completely voluntary. However, your views and experiences are important in order to help inform Welsh Government policies.

The contact for this evaluation at *Arad Research* is Sioned Lewis.

Telephone: 029 2044 0552

Email: sioned@arad.wales

PRIVACY NOTICE

What personal data do we hold and where do we get this information?

Personal data is defined under the UK General Data Protection Regulation (UK GDPR) as “any information relating to an identifiable person who can be directly or indirectly identified by reference to an identifier”.

Your contact details were provided to *Arad Research* by the Welsh Government. Welsh Government hold your details through your engagement with the Welsh Government during the delivery of the Childcare Offer for Wales. Your participation is voluntary and if you do not wish to take part or be sent reminders then please reply to the invitation email and your details will be removed.

The focus groups and interviews do not require the collection of any additional personal data except for your image if you agree to a video recording or the interview or focus group in Microsoft Teams.

We wish to record focus groups and interviews for operational reasons. We will make this clear to you before the interview or focus group begins, and you will have the opportunity to tell us if you are not happy for the discussion to be recorded. A focus group will only be recorded if all members of the group are happy for this to happen. If focus groups or interviews are recorded, personal data will be removed during the process of transcribing. Recordings will be deleted as soon as this process is completed. If discussions are not recorded, personal data will not be included in written notes prepared during or following the focus group or interviews.

The retention period for any comments made within the chat bar will be 7 days. Therefore, any responses provided through the chat bar function will be deleted 7 days following the focus group or interview and will be included in any written notes in an anonymous format with personal details removed.

If you raise a query or complaint and provide personal data requesting a response, the researcher will forward the request only to the relevant official and subsequently delete it from the research data.

What is the lawful basis for using your data?

The lawful basis for processing information in this data collection exercise is our public task; that is, exercising our official authority to undertake the core role and functions of the Welsh Government.

Participation is completely voluntary. Evaluations such as this are important for the Welsh Government to collect information and actionable evidence about its ability to deliver government priorities.

How secure is your personal data?

Personal information provided to *Arad Research* by the Welsh Government is always stored securely. The data can only be used by a limited number of researchers who are working on the evaluation. Social researchers from *Arad Research* will only use participant contact details to contact them for research purposes. *Arad Research* have Cyber Essentials certification.

Arad Research have put in place procedures to deal with any suspected data security breaches. If a suspected breach occurs, *Arad Research* will report this to the Welsh Government who will notify you and any applicable regulator where we are legally required to do so.

Arad Research will use the data to produce a report for the Welsh Government. This report will not include any information that could be used to identify individual participants.

How long do we keep your personal data?

Arad Research will hold personal data during the contract period, and any personal data not already removed will be deleted three months after the end of the contract. This includes your contact details.

Arad Research will provide Welsh Government with an anonymised version of the data which will not include information that could identify you.

Individual rights

Under UK GDPR, you have the following rights in relation to the personal information you provide as part of this evaluation, you have the right to:

- Access a copy of your own data;
- Require us to rectify inaccuracies in that data;
- To object to or restrict processing (in certain circumstances);
- For your data to be 'erased' (in certain circumstances); and
- To lodge a complaint with the Information Commissioner's Office (ICO) who is our independent regulator for data protection.

The contact details for the Information Commissioner's Office are: Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF. Phone: 01625 545 745 or 0303 123 1113. Website: www.ico.gov.uk

Further Information

If you have any further questions about how the data provided as part of this study will be used by the Welsh Government or wish to exercise your rights using the UK General Data Protection Regulation, please contact:

Name: Jack Watkins

E-mail address: jack.watkins004@gov.wales

Telephone number: 0300 025 9321

The Welsh Government's Data Protection Officer can be contacted at:

Welsh Government, Cathays Park, Cardiff, CF10 3NQ

Email: DataProtectionOfficer@gov.wales.

Provider survey

The Welsh Government has commissioned Arad Research to undertake research to inform two pieces of work:

- an evaluation of the fifth year of the Childcare Offer for Wales; and
- an independent review of child minding.

The aim of the evaluation of the Childcare Offer for Wales is to assess the performance of the schemes and help Welsh Ministers make decisions relating to the development of the policy in relation to the Childcare Offer.

The aim of the independent review of child minding is to help Welsh Ministers understand issues that are faced by child minders and inform potential future policy in this area.

To support both of these pieces of work, Arad Research will be gathering information through a survey that is open to

- a) Child minders
- b) All childcare providers that deliver the Childcare Offer.

The Welsh Government is the data controller for the research. However, Arad Research will delete any personal data provided through the survey and anonymise the raw data, before it is shared with the Welsh Government.

The information collected during the project will be included in reports that will be published on the Welsh Government website and possibly in other publications by Arad Research and Welsh Government. You will not be identifiable from any reports, as all comments will be anonymised.

Your participation in this research is completely voluntary. However, your views and experiences are important in order to help inform Welsh Government policies.

The contact for this research at Arad Research is Sioned Lewis

E-mail address: sioned@arad.wales

Telephone number: 029 2044 0552

PRIVACY NOTICE

What personal data do we hold and where do we get this information?

Personal data is defined under the UK General Data Protection Regulation (UK GDPR) as 'any information relating to an identifiable person who can be directly or indirectly identified by reference to an identifier'.

Your contact details (name and email) were provided to Arad Research by the Welsh Government who received them from your Local Authority. These details were originally provided when you applied to take part in the Childcare Offer for Wales. Arad Research will only use your contact details to send you a link to the survey.

This research does not require the collection of additional personal data from you. Completing the survey does not capture your email address or IP address and so the responses will be anonymous. If you choose to provide additional personal data in open text questions we will try not to identify you from, or link your identity to, the responses you provide.

Your participation is voluntary and if you do not wish to take part or be sent reminders then please reply to the invitation email and your details will be removed.

If you raise a query or complaint and provide personal data requesting a response, the researcher will forward the request only to the relevant official and subsequently delete it from the research data.

What is the lawful basis for using your data?

The lawful basis for processing information in this data collection exercise is our public task; that is, exercising our official authority to undertake the core role and functions of the Welsh Government.

Participation is completely voluntary. Research studies such as this are important for the Welsh Government to collect information and actionable evidence about its ability to deliver government priorities. The information collected in this research, for example, might be used to:

- review the implementation of the Childcare Offer;
- support improvements to the Offer;
- support the development of policy relating to child minders.

How secure is your personal data?

Personal information provided to Arad Research is always stored on a secure server. The data can only be accessed by a limited number of researchers working on this project. Arad Research will only use this data for research purposes. Arad Research has cyber essentials certification.

When conducting surveys, Arad Research use a survey software programme called Smart Survey. We have ensured that Smart Survey is UK GDPR compliant and meets our expectations in terms of the security of any data collected and processed via the software.

Arad Research has procedures to deal with any suspected data security breaches. If a suspected breach occurs, Arad Research will report this to the Welsh Government who will notify you and any applicable regulator where we are legally required to do so.

Arad Research will use the information gathered to produce reports that will be published on the Welsh Government website. These reports will not include any information that could be used to identify individual participants.

How long do we keep your personal data?

Arad Research will hold personal data during the contract period, and any personal data will be deleted by Arad Research three months after the end of the contract. This includes your contact details.

Arad Research will provide Welsh Government with an anonymised version of the data which will not include information that could identify you.

Individual rights

Under UK GDPR, you have the following rights in relation to the personal information you provide as part of this research, you have the right:

- To access a copy of your own data;
- For us to rectify inaccuracies in that data;
- To object to or restrict processing (in certain circumstances);
- For your data to be 'erased' (in certain circumstances); and
- To lodge a complaint with the Information Commissioner's Office (ICO) who is our independent regulator for data protection.

The contact details for the Information Commissioner's Office are: Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF. Phone: 01625 545 745 or 0303 123 1113. Website: www.ico.gov.uk

Further Information

If you have any further questions about how the data provided as part of this study will be used by the Welsh Government or wish to exercise your rights using the UK General Data Protection Regulation, please contact:

Name: Jack Watkins

E-mail address: jack.watkins004@gov.wales

Telephone number: 0300 025 9321

The Welsh Government's Data Protection Officer can be contacted at:

Welsh Government, Cathays Park, Cardiff, CF10 3NQ, Email:

DataProtectionOfficer@gov.wales.

Parent Survey

The Welsh Government has commissioned Arad Research to undertake an evaluation of the fifth year of the Childcare Offer for Wales. The aim of the evaluation is to assess the performance of the scheme and help Welsh Ministers make decisions relating to the development of the policy in relation to the Childcare Offer.

As part of this evaluation, Arad Research will be gathering information through a survey of parents who have accessed the Childcare Offer.

The Welsh Government is the data controller for the research. However, Arad Research will delete any personal data provided through the survey and anonymise the raw data, before it is shared with the Welsh Government.

The information collected during the project will be included in a report published on the Welsh Government website and possibly in other publications by Arad Research and Welsh Government.

Your participation in this research is completely voluntary. However your views and experiences are important in order to help inform Welsh Government policies.

The contact for this research at Arad Research is Sioned Lewis

E-mail address: sioned@arad.wales

Telephone number: 029 2044 0552

PRIVACY NOTICE – SURVEY OF PARENTS

What personal data do we hold and where do we get this information?

Personal data is defined under the UK General Data Protection Regulation (UK GDPR) as ‘any information relating to an identifiable person who can be directly or indirectly identified by reference to an identifier’.

Your contact details, in the form of name, email address and telephone number, were provided to Arad Research by the Welsh Government who received them from your Local Authority. You originally provided these details when you applied to take part in the Childcare Offer for Wales.

Arad Research will only use your contact details to send you a link to the survey. Your participation is voluntary and if you do not wish to take part or be sent reminders then please reply to the invitation email and your details will be removed. Completing the survey does not capture your email address or IP address and so the responses will be anonymous. If you choose to provide additional personal data in open text questions we will try not to identify you from, or link your identity to, the responses you provide.

If you raise a query or complaint and provide personal data requesting a response, the researcher will forward the request only to the relevant official and subsequently delete it from the research data.

What is the lawful basis for using your data?

The lawful basis for processing information in this data collection exercise is our public task; that is, exercising our official authority to undertake the core role and functions of the Welsh Government. Some of the data we are collecting are called ‘special category data’ (in this case ethnicity) and the lawful basis for processing this information is that it is for statistical or research purposes.

Participation is completely voluntary. Research studies such as this are important for the Welsh Government to collect information and actionable evidence about its ability to deliver government priorities. The information collected in this research, for example, might be used to:

- measure how well Welsh Government and Local Authorities are delivering their services to you and your child;
- support improvements to these services;
- support wider research into the provision of services to you and your child, or others.

How secure is your personal data?

Personal information provided to Arad Research is always stored on a secure server. The data can only be accessed by a limited number of researchers working on this project. Arad Research will only use this data for research purposes. Arad Research has cyber essentials certification.

When conducting surveys, Arad Research use a survey software programme called Smart Survey. We have ensured that Smart Survey is UK GDPR compliant and meets our expectations in terms of the security of any data collected and processed via the software.

Arad Research has procedures to deal with any suspected data security breaches. If a suspected breach occurs, Arad Research will report this to the Welsh Government who will notify you and any applicable regulator where we are legally required to do so.

Arad Research will use the information gathered to produce a report that will be published on the Welsh Government website. This report will not include any information that could be used to identify individual participants.

How long do we keep your personal data?

Arad Research will hold personal data during the contract period, and any personal data will be deleted by Arad Research three months after the end of the contract. This includes your contact details.

Arad Research will provide Welsh Government with an anonymised version of the data which will not include information that could identify you.

Individual rights

Under UK GDPR, you have the following rights in relation to the personal information you provide as part of this research, you have the right:

- To access a copy of your own data;
- For us to rectify inaccuracies in that data;
- To object to or restrict processing (in certain circumstances);
- For your data to be 'erased' (in certain circumstances); and
- To lodge a complaint with the Information Commissioner's Office (ICO) who is our independent regulator for data protection.

The contact details for the Information Commissioner's Office are: Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF. Phone: 01625 545 745 or 0303 123 1113. Website: www.ico.gov.uk

Further Information

If you have any further questions about how the data provided as part of this study will be used by the Welsh Government or wish to exercise your rights using the UK General Data Protection Regulation, please contact:

Name: Jack Watkins

E-mail address: jack.watkins004@gov.wales

Telephone number: 0300 025 9321

The Welsh Government's Data Protection Officer can be contacted at:

Welsh Government, Cathays Park, Cardiff, CF10 3NQ, Email:

DataProtectionOfficer@gov.wales.