Independent Review of Childminding

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This document is also available in Welsh.

Title: Independent Review of Childminding

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

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Table of contents

List of tables

List of figures

Glossary

Acronym/Key word	Definition / Description
BW	**Business Wales** is a Welsh Government sponsored body that provides information, advice, and guidance to help sustain and grow businesses in Wales.
CSA	**Childcare Sufficiency Assessment** forms part of a duty on local authorities to assess whether there are sufficient childcare opportunities to support working families within the area.
CIW	**Care Inspectorate Wales** is the independent regulator of social care and childcare in Wales. They register, inspect and take action to improve the quality and safety of services for the well-being of the people of Wales.
FIS	**Family Information Services** are services located within each local authority in Wales that offer information, assistance and advice on childcare as well as other children and young people's activities.
HBCC	**Home-based Child Care** is a form of non-parental childcare that takes places within the home of either the child or the provider, as opposed to a centre or other setting.
LSOA	**Lower Super Output Area** are geographical areas that represent an average population of 1500 people or 650 households.
NMS	**National Minimum Standards** help childcare providers meet the regulations for providing a childcare service in Wales.
PACEY Cymru	The **Professional Association for Childcare and Early Years** in Wales - provide training, practical help and expert advice to practitioners working throughout Wales.
SASS	**Self-Assessment of Service Statement** is an online form Registered Persons and Responsible Individuals are required to complete under the Child Minding and Day Care (Wales) Regulations 2010, in relation to monitoring compliance of a service.

1. Introduction

1.1 Care Inspectorate Wales (CIW) figures show that between March 2017 and March 2021 the number of registered childminders in Wales decreased year on year, with around 400 fewer settings in March 2021 compared to March 2017. The loss of childminders and the childcare places that they offer is in contrast to some other parts of the sector and the expansion of funded childcare and other early years policy initiatives. The decline in the number of registered childminders is likely to have a significant impact on childcare availability and accessibility, and threatens the statutory responsibility placed on Local Authorities to secure provision of childcare for children and families. The Welsh Government commissioned Arad Research to carry out an independent review to better understand the reasons for this decline, and what might be done to support growth in the number of childminders.

Background

1.2 The childcare sector in Wales enables parents to work and train, these parents go on to collectively generate around £1.2 billion[1] in income per year in Wales (Crocker et al. 2018). It is also a large workforce, with almost 15,000[2] working in registered settings (Bonetti and Cooper 2022). The childcare sector is therefore key in the social and economic development of Wales and it is important that the government supports flexible, affordable and high-quality childcare (Crocker et al. 2018). Welsh Government has committed to ensuring a range of high-quality childcare options are available to families and children. This commitment is reflected in a number of policies in recent years, including *Welsh Government's Programme for Government for 2016 – 2021; Prosperity for All[3], The Employability Plan[4];* and *Childcare, Play and Early Years Workforce Plan (2017)[5]*. The Prosperity for all Strategy sets out the ambition that children from all backgrounds should have the best start in life. An important part of this ambition is the role that early education and childcare plays in providing a safe and stimulating environment. The Childcare, Play and Early Years Workforce Plan sets out proposals to achieve an integrated early education and

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[1] This figure is quoted in Crocker et al. (2018) and refers to the total income from employment and self-employment of the lowest-earning parent (including lone parents) in households in Wales using formal childcare.
[2] This figure is quoted in Bonetti and Cooper (2022) and comes from CIW SASS data July - August 2021
[3] Prosperity for All: economic action plan | GOV.WALES
[4] Employability plan 2018 | GOV.WALES
[5] Childcare, play and early years workforce plan | GOV.WALES

care system, with a skilled childcare and play workforce to support children's development.

1.3   In September 2017, the Welsh Government began the early implementation of the Childcare Offer for Wales (the Offer) offering 30 hours a week of government-funded early education and childcare for working parents of three and four-year-olds. Other initiatives that have supported children in the early years include Holiday Hunger, Playworks, Summer of Fun and the Winter of Wellbeing. In April 2022 the Welsh Government increased its funding commitment to the Offer by an additional £6m per year in order to raise the Offer's hourly rate for childcare providers up from £4.50 to £5 per hour. The aim of this 11% increase was to help provide greater sustainability across the childcare sector in Wales[6]. Childminders are key in delivering the Offer and ensuring parents have access to high quality childcare.

1.4   Childminders are said to provide a specialist type of service as family support and a form of pedagogical approach to children's development distinct to other types of early years care (Ang et al. 2017). Research has found that childminders provide a number of benefits such as:

- homely settings;

- more intimate and one-to-one personalised care;

- learning and development support across a range of ages,

- continuity of care;

- close relationships and;

- a professional approach, with expertise and qualifications (Glencross et al. 2021).

Research Aims

1.5   The aim of this independent review is to understand the reasons for the decline in the number of childminders in Wales, and investigate possible ways of reversing the current downward trend. The main objectives are as follows:

- Determine the reasons for the steady decline in childminding numbers in Wales;

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[6] NEWS: Childcare Offer for Wales rate review/Adolygiad o gyfraddau Cynnig Gofal Plant Cymru | PACEY

- Identify the main issues reported by Care Inspectorate Wales in childminding inspections and their communication with childminders;

- Identify the main issues reported in the national Childcare Sufficiency Assessment parent survey in relation to childminders;

- Explore the challenges the childminding workforce face based on their personal views and experiences; and

- Consider interventions, recommendations and lessons that can be learnt from Wales and elsewhere to help retain and recruit childminders.

2. Methodology

This methodology chapter outlines the approach taken to conducting the review. A mixed-methods evidence gathering approach was adopted, which drew heavily on primary data gathered from surveys and interviews with childminders as well as group discussions with a range of stakeholders including representatives of PACEY, the Welsh Government, Local Authorities, and Care Inspectorate Wales (CIW).. Secondary data from published literature, Care Inspectorate Wales (CIW) reports, Self-Assessment of Service Statement (SASS) data, and Childcare Sufficiency Assessment (CSA) parent survey data was also reviewed. Further detail on the approach adopted are included in the sections that follow.

Literature review

2.1 A review of the existing literature on childminding was undertaken to inform the research, identify key issues and topics relevant to childminders, and to add further context and understanding to the picture of childminding in Wales and elsewhere. The literature review had the following focus: benefits of childminding; challenges and barriers childminders face; and initiatives or best practise examples to support, retain and recruit childminders.

2.2 The review focused on sources dated 2010 onwards to reflect more up-to-date evidence of childminding. It also focused on literature based on childminding in the UK, only a small sample of literature was explored from outside of the UK.

2.3 The following search terms were used for the literature review:

- Childminder/childminding
- Home-based childcare settings
- Family childcare providers
- Family care settings

2.4 Databases searched included JSTOR, ERIC, ScienceDirect Journals, however the majority of the literature referenced was grey literature through Google Scholar, PACEY and sources identified through articles and reports.

Analysis of Care Inspectorate Wales childminder inspection reports

2.5   The aim of this analysis of childminder inspection reports was to identify themes raised within the reports regarding common issues about the quality of provision, thus contributing to an understanding of challenges that childminders face.

2.6   A sample of 150 inspection reports were randomly selected, ensuring a geographic spread of childminders across Wales.

Analysis of Childcare Sufficiency Assessment parent survey data

2.7   Data from Welsh Government's national parents survey, which supports local authorities Childcare Sufficiency Assessment duty, was analysed as part of this research. The purpose of this survey is to better understand the childcare needs of families in Wales with children aged 0 to 17 years old. It aims to collect information from parents relating to experiences of using registered and unregistered childcare services.

2.8   The dataset for this parent survey (undertaken during September and October 2021) consisted of 8,621 responses. Of these responses 3,586 respondents provided an answer to the question "Were there any specific difficulties finding childcare for one or more of your children? If so, why?" Responses to this question were searched for specific references to childminder (348 responses). These responses were analysed to identify common themes raised. The most common themes identified from these responses are discussed throughout chapter 5.

Review of Care Inspectorate Wales data

2.9   The data reviewed was sourced from Care Inspectorate Wales (CIW) and Stats Wales and included:

- Total annual number of registered childcare settings in Wales broken down by type of setting (2018 to 2022)

- Total capacity of childcare places across registered settings in Wales by setting type (2018 to 2022)

- Total number of annual new registrations and cancelled registrations of childcare settings in Wales by setting type (2018 to 2022)

- Total number of settings in Wales according to language of provision (Welsh, English and both languages) by setting type.

- Total capacity of childcare places according to language of provision (Welsh, English and both languages) by setting type.

2.10   The data was analysed to compare trends recorded in each of the above for childminders with other childcare settings in Wales.

2.11   There are some limitations to the data analysis that could be undertaken by Arad as part of this review. For example, there are limitations on publicly available data to undertake the comparison analysis across setting types on a local authority level. There was also a gap in the data available to undertake comparative analysis in relation to the characteristics (age, gender and ethnicity) of the childcare workforce and specifically the childminding workforce. Some of these limitations were overcome with the support of the Welsh Government who were able to undertake some comparative analysis on SASS data on a local authority and Lower Super Output Area (LSOA) level (see tables 3.3, 3.5 and Figure 3.4).

Interviews with Welsh Government officials

2.12   Interviews were held with three childcare policy leads from Welsh Government to gain insight on the policy context relating to attractions and retentions of childminders, support for them and wider policy related to childcare.

Workshops with local authorities' childcare leads

2.13   Local authorities' childcare leads were invited to take part in virtual discussion groups in October 2022 to share their views on childminding. Local authority childcare leads were offered two possible dates when they could attend an online group discussion to focus on the following topics:

- changes in the number of childminders operating in their area and views on reasons for changes in numbers over time;

- information relating to childminders from their CSA's;

- local demand with regards childminding;

- childminders support of children with ALN;

- workforce issues.

Interviews with stakeholders

2.14 The following interviews were held with stakeholders to gain further insight to the challenges faced by childminders:

- Interviews with three **representatives from CIW** – focussing on their observations of key issues arising from the inspections and the data they hold. They were also able to share some data and information with Arad after the discussion which has been used in this report.

- Interviews with three **representatives of PACEY Cymru** – focussing on the challenges childminders face (such as demand for and delivery of their provisions; issues relating to National Minimum Standards (NMS) requirements; local planning requirements etc.). They were also asked what support is currently available and what is required to overcome challenges faced by childminders and in retaining and attracting childminders.

- Interview with one representative from **Business Wales** – focussing on take up on advice, grants and planning issues.

Survey of childminders

2.15 To reduce the risk of survey fatigue and to gain a good survey response rate, the online survey of childminders was incorporated within another childcare survey that Arad were distributing as part of the evaluation of year five of the Childcare Offer. A link to the online survey (which was conducted during July to September 2022) was sent to all childcare providers that had delivered the Childcare Offer. Providers who selected that they were childminders were routed to an additional section of the survey. The survey was also promoted on the PACEY Cymru website to ensure childminders who were not delivering the Childcare Offer were also given the opportunity to respond.

2.16 Topics within the survey included: background of the childminder; main challenges faced; if challenges have become more difficult over the past three years; and future plans. Childminders were also asked if they would be willing to take part in follow up telephone interviews.

2.17 The survey was completed by 188 childminders. Tables 2.1 and 2.2 show the numbers of childminder respondents by local authority and length of time in the

profession. It should be noted however, that many of the childminders who responded to the survey noted that they found using computers and, in some cases, gaining access to the internet to be challenging (see section 6). Therefore, conducting an online only survey may have placed limitations on the ability of some childminders to respond to it.

Table 2.1: Childminder survey respondents by local authority

Local authority	No. of responses
Blaenau Gwent	4
Bridgend	5
Caerphilly	9
Cardiff	21
Carmarthenshire	8
Ceredigion	12
Conwy	15
Denbighshire	5
Flintshire	16
Gwynedd	12
Isle of Anglesey	7
Merthyr Tydfil	1
Monmouthshire	3
Neath Port Talbot	8
Newport	9
Pembrokeshire	8
Powys	12
Rhondda Cynon Taff	6
Swansea	8
Torfaen	7
Vale of Glamorgan	9
Wrexham	3
Total	**188**

Table 2.2: Childminder survey respondents by length of time childminding

Length of time as a childminder	No. of responses
Less than 12 months	3
1-3 years	22
4-6 years	21
7-9 years	20
10 years or more	121
Not stated	1
Total	**188**

2.18   Table 2.2 outlines that the largest proportion of respondents were those who had been registered as childminders for 10 years or more. The data review findings discussed in section 3, indicates that for many, childminding is a relatively short-term career option, suggesting that many current childminders will only have been operating for a relatively short period of time. This in turn suggests that the profile of survey respondents, in respect to the length of time they have worked as childminders, may not accurately reflect that of the childminding sector. However, analysis of CIW registration data outlines that alongside the transient group of childminders who register their business for only few years, the childminding sector in Wales also includes of a stable core of individuals who have provided a service over many years. The data indicates that a larger proportion of child minders compared to children's day care, registered their business up to 20 years ago. This would suggest that the profile of survey respondents is likely to reasonably representative of the childminding sector in terms of length of time they have been operating.

Interviews with childminders

2.19   Telephone interviews were conducted with 30 childminders to explore their views and experiences in more detail. In addition to contact details of current childminders collected as part of the online survey, PACEY Cymru also provided Arad with contact details for a small number of deregistered childminders and those who had started the process of becoming a childminder but had not proceeded to registration. Those that were interviewed comprised of:

- Four deregistered childminders;
- one who did not proceed to registration and;
- 25 current childminders.

2.20 Table 2.3 shows the numbers of interviews conducted with childminders by their local authority area. A spread of interviews across various areas was achieved to ensure good geographical representation within the sample available. Interview topics focused on:

- reasons for becoming a childminder;
- benefits as well as challenges or barriers to childminding;
- impacts of CovidCOVID-19;
- the level and type of support available to childminders, and;
- any further support needed by childminders or suggestions as to how to overcome current challenges and achieve future plans.

2.21 In addition to telephone interviews with childminders, Arad also attended two PACEY Cymru conferences where they facilitated group discussions with childminders attending the event. These discussions focused on any challenges childminders faced, and any additional support required to overcome these challenges.

Table 2.3: Number of childminders interviewed by local authority area

Local authority	No. of interviews
Blaenau Gwent	1
Bridgend	2
Cardiff	2
Carmarthenshire	3
Ceredigion	2
Conwy	2
Flintshire	2
Gwynedd	2
Isle of Anglesey	1
Merthyr Tydfil	1
Pembrokeshire	2
Powys	2
Rhondda Cynon Taff	3
Swansea	2
Torfaen	1
Vale of Glamorgan	1
Wrexham	1
Total	**30**

Interviews with parents

2.22   All childminders interviewed were asked to send an email or message out to parents who use their service, to ask them, on behalf of Arad, to take part in a short telephone interview. This resulted in a modest response from parents which led to three parents who use childminders being interviewed over the phone.

2.23   Discussions focused on reasons for using a childminder, any issues accessing childcare and the main benefits of using a childminder.

3.   Exploring the decline in childminders

3.1   Care Inspectorate Wales (CIW) annual report for 2021-2022 highlights the continued impact of the pandemic on the childcare and play sector across Wales. The data shows an overall decrease in services of 8% and a 4% decrease in places registered for childcare and play during 2021-2022, with the largest decrease in numbers of childminders. Although the pandemic has undoubtedly had an impact on the availability of childcare and play services since 2020 / 21, the downward trend in the total number of childcare settings in Wales stems back further than that. A year on year fall in the number of registered settings has been recorded since at least 2018. The total number of all registered childcare settings in Wales fell by 563 between March 2018 and March 2022 – a 14 per cent drop from 4,137 registered settings in 2018 to 3,574 in 2022 (source CIW).

3.2   The number of available childcare places also fell during this period, but only by two per cent from just over 83,000 places in 2018 to just over 81,400 in 2022 – see tables 3.1 and 3.2.

Table 3.1: Number of registered childcare settings in Wales 2018 - 2022

	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Difference 2018 - 2022	% Change
	Total number of settings						% Change
Childminders	**2,201**	**2,131**	**2,025**	**1,931**	**1,686**	**- 515**	**- 23%**
Childrens Day Care.	**1,936**	**1,942**	**1,941**	**1,951**	**1,888**	**- 48**	**-0.83**
Creches	27	26	20	17	14	- 13	- 48%
Full Day Care	749	878	970	1,010	1,015	266	36%
Open Access Play Provision	50	45	41	40	38	- 12	- 24%
Out of School Care	415	390	385	385	358	- 57	- 14%
Sessional Day Care	695	603	525	499	463	- 232	- 33%
All Childcare settings (Childminders and Childrens Day Care)	**4,137**	**4,073**	**3,966**	**3,882**	**3,574**	**- 563**	**- 14%**

Source: Care Inspectorate Wales (CIW)

Table 3.2: Number of registered childcare places in Wales 2018 – 2022

	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Difference 2018 - 2022	% Change
	Total number of childcare places						
Childminders	**16,184**	**16,113**	**15,694**	**15,132**	**13,517**	**- 2,667**	**- 17%**
Childrens Day Care.	**66,881**	**67,317**	**68,631**	**69,376**	**67,909**	**1,028**	**1.5%**
Creches	657	636	546	457	406	- 251	- 38%
Full Day Care	31,197	34,593	37,638	39,134	39,412	8,215	26%
Open Access Play Provision	3,534	3,111	3,025	2,960	2,931	- 603	- 17%
Out of School Care	15,909	15,366	15,656	15,484	14,723	- 1,186	- 8%
Sessional Day Care	15,584	13,611	11,766	11,341	10,437	- 5,147	- 33%
All childcare settings (Childminders and Childrens Day Care)	**83,065**	**83,430**	**84,325**	**84,508**	**81,426**	**- 1,639**	**- 2%**

Source; Care Inspectorate Wales (CIW)

3.3   The relatively large fall in the total number of registered settings (14 per cent) compared to a lower proportional fall in the number of available childcare places (two per cent) between 2018 and 2022, indicates that most of the childcare services lost during this period were smaller settings. This is also reflected in the fact that the largest year on year decline in the number of registered settings since 2018 has been amongst childminders. The number of registered childminders in Wales fell by 23 per cent between 2018 and 2022 - falling from 2,201 registered settings in 2018 to 1,686 in 2022. The number of childminder places available during this time also fell sharply (17 per cent) falling from 16,100 places in 2018 to just over 13,500 in 2022.

3.4   The number of registered Childrens Day Care settings, i.e. all childcare settings other than childminders, remained fairly steady between 2018 and 2021 (ranging from 1,936 registered settings in 2018 to 1,951 registered settings in 2021. However, the number of Childrens Day Care settings fell between 2021 and 2022, resulting in a slight net fall of just under one percent in these settings between 2018 and 2022. The number of places available in registered Childrens Day Care settings increased steadily each year during 2018 and 2021. Again, there was a slight fall in

the number of registered Childrens Day Care places during 2021 and 2022 but overall, the number of places in these settings increased by 1.5% between 2018 and 2022.

3.5   Most types of Childrens Day Care settings however, recorded at least some year on year decline in the number of registered settings during this period (although not as sharp a decline as the number of childminders). The exception to this has been full day care settings, where the total number of registered settings has increased year on year since 2018, resulting in a total increase of 266 settings (36 per cent) between 2018 and 2022. The total number of full day childcare places available also increased by over 8,000 across Wales during this period (a 26 per cent increase). However, some of these increases and decreases in registered Childrens Day Care settings reflect the fact that many settings changed their registration status during this period. For example, a number of sessional day care settings have extended their operating hours since 2017 to become full day care services in order to accommodate the additional demand for childcare generated by the Childcare Offer for Wales. As such, not all cancelled sessional day care registrations reflect settings that have closed, and not all new full day care registrations reflect new settings that have opened – instead they often reflect changes in how these settings operate and therefore how they are registered.

3.6   This is not the case for childminders though. The rapid decline in the number of childminders and childminding places in Wales does not reflect a change in the way childminders operate. It reflects a real fall in the number of settings available. This is likely to have implications on many parents' choice in relation to the type of setting to which they can entrust the care of their children. In some areas it is also likely to have implications on the ability of parents to access childcare services that are near to them.

3.7   A decline in the number of registered childminders between 2020 and 2023 occurred across all local authority areas in Wales (see table 3.3). Local authority areas that recorded the largest fall in the number of registered childminders during this period include Cardiff, Swansea and the Vale of Glamorgan – these are also the areas that had the highest number of childminders operating in 2020. Local authority areas that recorded the highest proportional fall in registered childminders during this period included Merthyr Tydfil, Monmouthshire, Denbighshire and Gwynedd. These areas, particularly Merthyr Tydfil had relatively few registered childminders operating in their area to begin with.

Table 3.3: Number of child minders by local authority, by year

	Mar-20	Mar-21	Mar-22	Mar-23	Actual difference 2020 - 2023	% change 2020 - 2023
Merthyr Tydfil	20	18	13	11	- 9	- 45%
Caerphilly	131	127	111	109	- 22	- 17%
Powys	99	97	82	78	- 21	- 21%
Flintshire	113	111	100	96	-17	- 15%
Cardiff	262	256	229	214	- 48	- 18%
Rhondda Cynon Taf	145	132	123	122	- 23	- 16%
Monmouthshire	72	65	51	44	- 28	- 39%
Swansea	127	112	86	80	- 47	- 37%
Wrexham	54	54	52	50	- 4	- 7%
Neath Port Talbot	90	84	70	67	- 23	- 26%
Pembrokeshire	83	78	66	67	- 16	- 19%
Conwy	65	64	60	56	- 9	- 14%
Ceredigion	69	61	57	56	- 13	- 19%
Torfaen	45	45	36	33	- 12	- 27%
Blaenau Gwent	38	37	34	33	- 5	- 13%
Vale of Glamorgan	145	142	126	112	- 33	- 23%
Bridgend	84	81	69	62	- 22	- 26%
Newport	92	90	79	77	- 15	- 16%
Denbighshire	47	45	38	33	- 14	- 30%
Carmarthenshire	111	105	98	90	-21	- 19%
Gwynedd	82	75	66	57	-25	- 30%
Isle of Anglesey	53	52	46	43	-10	- 19%

Source: CIW register

3.8   The rapid fall in the total number of registered childminders in Wales has been driven by two factors, a relatively high number of childminders each year cancelling the registration of their service, accompanied by an annual decline in the number of new childminder registrations. As discussed in chapter 6 of this report, many childminders interviewed noted that they based their decision to become a childminder, on their lifestyle circumstances at the time. Typical scenarios reported, include new parents who decide to register as childminders in order to generate an income while also being able to look after their own children. Some of these parents later leave childminding to pursue employment elsewhere once their own children start full time education. As a result of scenarios such as this and others, the childminding sector in Wales has typically witnessed a relatively high annual churn of registrations and cancellations compared to other areas of the childcare sector.

3.9   Stakeholders interviewed noted that in the past, the number of childminders cancelling their registration each year were accompanied by similarly high number of new childcare registrations – sustaining a steady state. Following a high number of childminders cancelling their registration in 2018, the number of cancelled services recorded each year remained high, but fairly steady (ranging from 168 to 198 per annum) during the period 2019 and 2021[7]. However, the number of new registrations recorded during the same period not only remained consistently below the number of cancelled services, but also fell at a sharp rate year on year, falling from 141 new registrations in 2018 to just 45 new registrations in 2021 – see Figure 3.1. It would appear therefore that it is the declining number of new registrations that has been the main factor that has driven the sharp fall in the total number of childminding services recorded across Wales in recent years. The number of newly registered Day Care settings on the other hand increased overall from 132 in 2018 to 170 in 2022 and for most years remained above the number of cancelled services – see Figure 3.2.

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[7] A particularly sharp increase in cancellations was recorded in 2021 – 2022. However as noted in the section that follows, this was at least partly due to the digitisation of registrations work carried out by CIW during this time, which prompted many childminding services that were registered but not actively offering childcare provision, cancel their registration.

Figure 3.1: Annual childminder registrations and cancellations in Wales 2018 to 2022
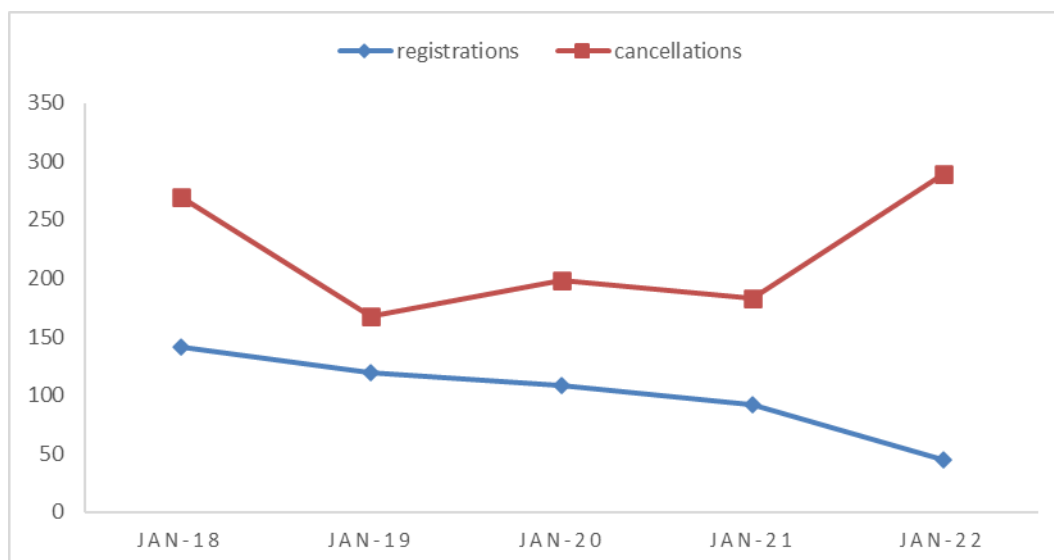
Source: Care Inspectorate Wales (CIW)

Figure 3.2: Annual childrens Day Care settings registrations and cancellations in Wales 2018 to 2022
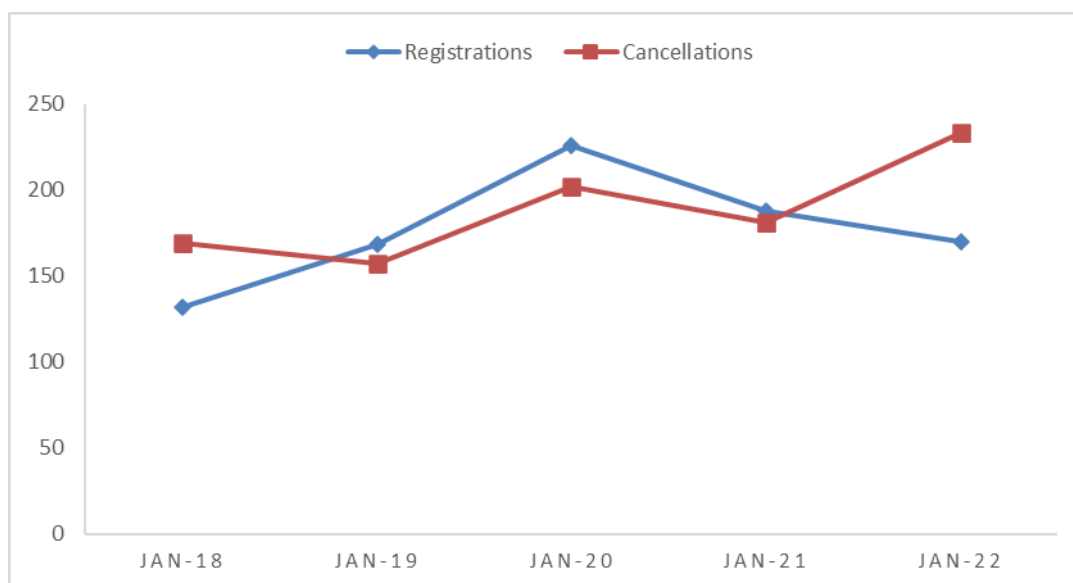
Source: Care Inspectorate Wales (CIW)

3.10   The number of childminders registered with CIW at any given time may not necessarily reflect the actual number of childminder services that are available. Some childminders apply to voluntarily suspend their CIW registration allowing them to stop operating as childminder for a set period of time while maintaining their registration, thus enabling them to restart their service at a later date without having to re-register. Whilst under voluntary suspension, these childminders do not provide

care for any children even though they are still recorded as a registered childcare service. As a result, the number of registered childcare services on record at any given time may overstate the actual number of childminding services that are actively providing a service to children and their families.

3.11   Childminders may decide to voluntarily suspend their registration for many reasons. However, a recent report produced by PACEY Cymru[8] outlined that several childminders apply for voluntary suspension status, even though they have no intention of restarting their childminding service. The findings also outline that many of these childminders remain voluntary suspended for a 'lengthy period of time' before cancelling their registration with CIW.

3.12   In 2021 CIW contacted all childminders as part of their process of digitising their registration process. This included contacting childminders who had voluntarily suspended their registration, to ask whether they intended to return to active childminding in the near future and if so prompt them to update their registration digitally. Many of the voluntary suspended childminders contacted noted that they did intend to return to childminding at some point. Several others, however, noted they did not intend to return to childminding in the foreseeable future. This contact by CIW prompted these childminders to officially cancel their service sooner rather than later, which contributed to the particularly sharp increase in childminder cancellations recorded during 2021 – 2022 (289 cancellations compared to an average of 183 per annum during the previous three years). This, alongside a fall in the number of new registrations during 2021 – 2022 resulted in a particularly sharp reduction of 245 (13%) in the total number of registered childminders and an 11% (1,615) reduction in the number of registered childminder places available for children during this year. This sharp reduction in the number of registered childminders recorded in 2021-2022 may not therefore necessarily indicate an accelerated rate of decline in the number of childminders operating during that period. Instead, the figures for 2021 – 2022 include an adjustment in the recorded number of childminders offering a more accurate reflection of the actual childminder capacity that currently exists in Wales.

Impact of childminding decline on the availability of Welsh language provision.

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[8] De-registration of childminders in Wales report – PACEY 2021

3.13   Overall, across all childcare settings, the number of childcare places that offer Welsh language provision increased slightly between 2019 and 2022. These additional Welsh language childcare places were created primarily within Childrens Day Care settings. In contrast, the availability of Welsh language provision within childminding settings fell sharply during the same period. As noted above, the total number of registered childminding settings fell by 24 per cent during 2018 and 2022, however, the number of Welsh language childminding settings fell even more sharply during the same period (a 28 per cent fall) – See table 3.4.

Table 3.4: Number of Childminders and Childrens Day Care services offering Welsh language childcare provision (2019 to 2022)

	Child minders		Childrens Day Care	
Date	**Settings**	**Capacity**	**Settings**	**Capacity**
September 2019	89	682	392	10,051
January 2020	87	664	392	10,125
April 2020	86	664	404	10,343
September 2020	84	650	411	10,586
January 2021	84	649	415	10,657
April 2021	82	633	411	10,654
September 2021	71	552	417	11,057
January 2022	71	563	406	10,613
April 2022	70	553	408	10,697
August 2022	64	517	412	10,809
Difference (2019 and 2022)	**-25**	**-165**	**20**	**758**
Percentage difference (2019 and 2022)	**-28%**	**-24%**	**5%**	**8%**

Source: CIW

3.14   The fall in the availability of Welsh language provision amongst childminders accompanied by an increase in Welsh language provision within Childrens Day Care settings, again reflects a shift in provision from smaller to larger settings. This shift may place some limitations on the ability of some parents to access Welsh language childcare provision, or at least limit their choice in terms of the type of settings from which they can access Welsh language provision. This is further outlined in the views expressed by in the National Childcare Sufficiency Assessment Parent Survey - see sections 5.17 to 5.18.

3.15   The sections above outline trends in the number of registered childminder settings and childminding places on a national, all Wales level. Reviewing similar trends on a local authority level in Wales is more challenging as there is less published data relating specifically to childminders available at this level. However, as outlined in table 3.3, some timeseries data relating to total number of registered childminders has been obtained with the support of the Welsh Government.

3.16   Publicly available information available via the CIW Data Tool[9] does, however, offer an overview of current capacity on a local authority level. The Power BI data outlines that, the highest number of registered childminders are located in Cardiff and other relatively high population local authority areas in southeast Wales – See figure A1 in Annex A. In most local authority areas, the number of registered childminding services is higher or at least on a par with the number of registered Childrens Day Care Services. However, across the local authorities in north Wales the number of registered childminders is considerably lower than the number of Day Care Services. In Denbighshire, the number of childminders is less than half the number of Childrens Day Care Services operating in the area, while in Wrexham it is almost a third. However, the Power BI data also outlines that the total number of all registered childcare providers per 1,000 children in north Wales is higher than the number available across other areas of Wales. As such, childminders in north Wales make up a small proportion of a relatively large local childcare sector.

3.17   On the other hand, Ceredigion records the highest number of childminders per 1,000 children, and compared to other local authority area in Wales, childminders in Ceredigion make up a larger proportion of all childcare provision available in the area. However, overall availability of childcare per 1,000 children in Ceredigion is lower than many other areas including areas of north Wales, i.e., childminders in Ceredigion make up a bigger proportion of a relatively small local childcare sector. – see table A2 in Annex A.

3.18   The CIW data referred to above offers an interesting high-level snapshot of the availability of childminding places across local authorities in Wales. However, it

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[9] The Data Tool is an interactive data visualisation tool which provides information on the number of services and places regulated with CIW

does not enable us to draw any firm conclusions relating to differences in the availability of childminding settings and places in rural compared to urban areas of Wales. Although some local authorities e.g. Powys, can be considered predominantly rural and others e.g. Cardiff considered mainly urban, rural and urban areas exit within both, as is the case across all local authority areas. To review differences in the availability between rural and urban areas data needs to be reviewed on a Lower Super Output Areas (LSOA) based on the rural-urban classification. The CIW data available at this geographic level is based on annual information gathered through the Self-Assessment of Service Statement (SASS) and includes information relating to the location of registered childminders on (LSOA) as well as ward level. However, data at this geographical level contains personal information including the private addresses of childminders homes where they tend to operate their business from. For data security reasons this data cannot be shared on the CIW website, or with any other third parties.

3.19 However, the Welsh Government has undertaken further analysis of this data at LSOA level to outline the number of childminding services compared to the number of Childrens day care settings registered across urban rural classification areas – see table 3.5. The data indicates that child minders are more likely than day care services to be in urban settings, and less likely to be in rural villages. The data also indicates that the proportion of all childcare services made up of childminders is similar across rural towns and villages as those recorded in urban areas. This appears contrary to views expressed by some stakeholders suggesting that parents in rural areas are more reliant on childminders than parents in more urban areas. However, the data presented in table 3.5 only offers a partial picture and does not for example outline trends over time in the availability of childminding services in rural and urban areas. Further data is required to enable a more detailed distinction to be made between the availability of childminding services in rural and urban areas. This includes time series data relating to registrations and cancellations as well as availability in relation to local population of 0 to 12 year olds. The availability of time series data based on information gathered through SASS is currently limited. Response rates and the format within which the SASS data has been gathered has not been consistent year on year. This in turn limits opportunities to track responses of two or more years.

Table 3.5: Approved Child Minder and Children's Day Care services by urban-rural LSOA classification.

	Child minder		Childrens day care			
	Number	Percentage of all childminders	Number	Percentage of all Childrens day care	Total Childcare services	Proportion of total that are childminders
Urban city and town	855	65%	968	58%	1,823	47%
Urban city and town in a sparse setting	12	1%	48	3%	60	20%
Rural town and fringe	166	13%	241	14%	407	41%
Rural town and fringe in a sparse setting	87	7%	93	6%	180	48%
Rural village and dispersed	76	6%	166	10%	242	31%
Rural village and dispersed in a sparse setting	114	9%	157	9%	271	42%
TOTAL	1,310		1,673		2,983	44%

Source: SASS 2021

Similar comparisons to those made for rural / urban areas can be made in relation to the availability of childminding compared to day care services across areas of Wales according to levels of deprivation. The findings indicate that, as might be expected, more childcare settings are available in less deprived areas compared to more deprived areas. The findings also indicate that childminders make up a lower proportion of all childcare settings in more deprived areas than in less deprived areas – see figure 3.4. This again appears contrary to the views expressed by some stakeholders who were of the view that parents in more deprived areas are more reliant on childminders than those in less deprived areas.

Figure 3.4: Approved registered childcare services from 2021 SASS by LSOA Welsh Index of Multiple Deprivation 2019 decile
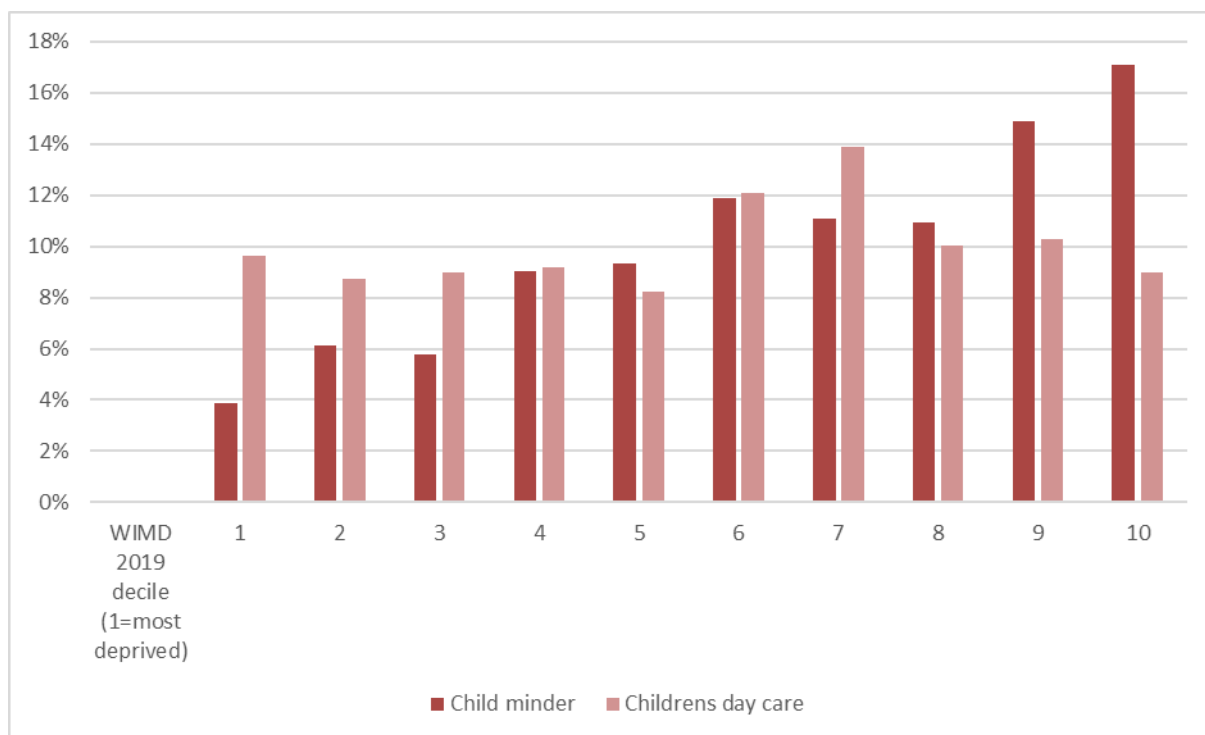
Source: SASS 2021

3.20   The data presented above offers an insight into the availability of childminding services compared to childrens day care services. However, it remains challenging to gain a comprehensive understanding of the landscape of childminding in Wales based on publicly available data. There are no regularly published analysis reports currently available outlining local-level time series data relating to the number of childminder registrations and cancellations. There is also a gap on a national as well as local level in the availability of consistent and regularly updated data relating to the characteristics including age, gender and ethnicity of childminders. As a result, key questions such as 'do the language skills and ethnicity of childminders reflect the communities they serve', and 'are there areas of under-representation within the characteristic makeup of the childminding workforce in Wales,' cannot be answered with the data currently available. Answers to these questions are reliant on the availability of granular local level data and is important to inform the planning of any national and / or local initiatives aimed at supporting childminders in Wales.

4.   Literature review

4.1   To provide further context, insight and understanding of childminding in Wales and the UK, this chapter presents a review of existing literature and research on the subject. The review process found several reports and studies which highlight the benefits of childminding and its importance to society. The review also found literature that demonstrates the numerous challenges faced by the sector such as bureaucratic processes, low pay, under appreciation of the profession, business and financial instability of the role and the impacts of COVID-19. A number of recommendations to help the challenges faced by childminders have also been drawn from this literature and are also presented in this chapter. However, although the review was extensive and focussed on available literature from across the UK and beyond, as reported by Ang et al. (2017), despite a growing interest in this area at policy level, there is relatively little existing research on childminding than we can draw on.

Benefits of childminding

4.2   In a qualitative study with childminders and parents who use childminders, undertaken by the Scottish Government and published in 2021, parents felt that childminders provide a number of benefits such as:

- a homely setting;
- more intimate and one-to-one personalised care for children across a range of ages;
- supporting learning and development and;
- a continuity of care.

4.3   Benefits highlighted by parents and families within this study included the flexible approach offered by childminders; the frequent contact and communication, the advice and help drawn from childminders due to close relationships, a professional approach, expertise and knowledge and childminders approach of going 'above and beyond' (Glencross et al. 2021).

4.4   Campbell-Parr et al. (2020) highlighted the importance of flexibility to the childcare and early years sector in England and Wales. Childminders can fill in gaps of the sector such as making up the 30 hours of funded childcare or providing spaces for small babies – a provision which can often be in short supply. They can often offer

longer hours of care, unsociable hours and wrap around care. They can also provide an important bridge between the home and a setting, especially for children for whom group settings are not suitable (Campbell-Parr et al. 2020). Ang (2020) found that childminding in the UK is a vital service for family support. It is also an important pedagogical model for children's development distinct to other types of provision. It allows an environment which gives children a voice on how and what they want to learn, going beyond 'just care' (Ang and Tabu, 2018). Ang et al. (2017) described how studies have found that childminders offer a rich and varied learning environment for children. The home-based setting offers opportunities for strong development and learning.

4.5   Fauth et al. (2021) carried out a research study on Childminding practice in England and found that childminders tended to take up the profession due to personal care circumstances but decided to stay in the profession due to a love of the job and being able to impact the lives of children and families. The research also found that childminding was built on a close trusting relationship between the childminders and children, with tailored provision of caring and learning an essential part of their role. Flexibility was also important to a childminder's role, with regard to the needs and interests of children as well as being able to adapt their service to suit parents (Fauth et al. 2011).

4.6   Hardy et al. (2022) found that childminding offers high levels of job satisfaction and a high sense of achievement, even after difficulties reported during the COVID-19 pandemic. Evans (2013) found that many childminders took up the profession because it was an opportunity to earn money while looking after their own children. The 'home from home' setting was also found to be important in childminder set ups and seen as an attraction for parents (Evans, 2013). It also gives some parents the reassurance that their child will be cared for in a more intimate setting, with emphasis on the interpersonal and personalised relationships, not only between the child and childminder, but between the parent and childminder too (Page, 2010 and Ang and Tabu, 2018). Childminders are said to be important for the role they play in the community as well as helping children to gain an understanding of what it is to be part of the community themselves and nurturing a sense of belonging and respect towards their path of citizenship (Griffin and Hevey, 2018). This important community aspect was also observed by Ang and Tabu (2018) who found that a sense of community and social networks developed amongst childminders, not only benefited the childminders themselves, but also the children.

Challenges faced by childminders

Bureaucratic processes

4.7   Difficult bureaucratic processes were listed as a challenge for childminders in a number of studies. In some cases, this was a barrier to childminders even completing their registration. For example, in an Ipsos MORI report commissioned by the Scottish Government on Childminding workforce trends (2022), evidence found that current and potential childminders often found the process of becoming a childminder time consuming and overly bureaucratic. In some cases, the perceived complexity and time to register made potential childminders decide not to enter the profession. Other key barriers identified in the report included concerns about whether new childminders could make a profitable business. These concerns focussed on start-up costs and a lack of awareness of existing support options around starting a childminding business. Childminder feedback presented in a report by Simpson et al 2022, suggests that childminders in Scotland feel they are unfairly expected to produce similar levels of documentations as larger nursery settings. The amount of time required to undertake these bureaucratic processes place challenges on the childminders ability to undertake other day-to-day aspects of running their business. However, it is important to note that childminders have slightly different bureaucratic systems in Scotland compared to Wales, especially when it comes to registering – this is explored in more detail in Section 4.29.

4.8   The Childminder Sustainability in England and Wales report (2019-20) found that childminders were critical of the time-consuming registration process, paperwork and regulatory burdens. They also felt that the inspection process did not recognise the uniqueness of a home-based pedagogy (Campbell-Barr et al. 2020). Similar findings were reported in the research by National Centre for Social Research (NatCen) who undertook 33 interviews with current and former childminders in England. They found that childminders face several bureaucratic challenges as part of their role, such as competing paperwork, keeping up with policy changes and requirements, and gathering evidence for inspections. These tasks were also often done during evenings and weekends to avoid compromising the quality of care to the children. The findings also outlined other challenges faced by childminders including:

- loneliness;

- working long hours;

- dealing with difficult parents;

- lack of stability of being self-employed;

- lack of stability of income due to fluctuating demand (especially during and after COVID-19);

- low pay;

- funded hour rates too low;

- concerns about the expenses of setting up and running a business, especially with the current cost of living crisis;

4.9   Childminders also felt undervalued by government, parents and the early years sector with this perceived low status impacting their ability to compete with nurseries to recruit children (Uglow et al. 2022).

4.10   In a report on the cancellation of registration amongst childminders in Wales in 2017, PACEY Cymru found that the main reasons for these cancellations were:

- change of personal circumstances;

- unsustainable childminding service;

- increased burden (paperwork and regulatory changes);

- new employment or training opportunity;

- and the isolation that accompanies the childminding role.

4.11   A similar report by Shorto and Landes (2017), based on interviews with 16 childminders in London who had cancelled their service, found that more than half reported the regulation and paperwork represented an unreasonable burden that distracted and detracted from time spent with children. Some childminders also had issues with inspections and felt that Ofsted were working against childminders and not with them. Childminders in the study also felt that they did not have much support and guidance available from local authorities.

4.12   There are also some concerns regarding the required digital literacy of the childminding role, with Glyn et al. (2022) in their *Evaluation of Year 4 of the Childcare Offer* finding that some childminders were concerned about their digital literacy and access to technology. One childminder in the Evaluation by Glyn et al. (2022) cited their struggles with digital literacy, particularly around providing returns for the Childcare Offer, as a key factor in their decision to leave childminding.

4.13　The National Minimum Standards (NMS) (Welsh Government 2016) restrict the adult:child ratios within childminding settings to 10 children up to the age of 12. Of these, no more than six are to be under the age of eight, no more than three under the age of five and no more than two under 18 months old. This applies per childminder. Where childminding assistants are employed, these numbers can increase, depending on the space available in the premises. Welsh Government (2019) carried out a review of the NMS for regulated childcare in Wales, this was a mixed method piece of research including desk-research and interviews with stakeholders and local authority childcare and play departments. From the collated evidence in the NMS review, some of the feedback reported relates specifically to issues raised by childminders or reported by stakeholders. Some fed back that the NMS were sometimes challenging to implement due to an inflexible approach to the application of ratios, particularly for childminders caring for children under the age of five. Views expressed in the feedback also referred to the guidance and the need in their view, for greater clarity around the regulatory requirements for childminding assistants, childminders working together and child numbers, and a need to simplify the regulations for childminders. A recommendation which came out of this report was to provide clearer guidance regarding ratios where there are more than two registered childminders or more than one childminder and an assistant workings in one premises. The report also calls further guidance on the role of childminder assistants. A general recommendation also included the need to explore ways of simplifying the current NMS. The Welsh Government has subsequently consulted on some of the key recommendations from the review including the need to provide further guidance on the role of child minder assistants.

4.14　Within the same report feedback on the increased level of paperwork was also raised as a significant challenge. This was particularly the case amongst childminders who, unlike many day care settings, do not have administration staff to deal with the increasing volume of paperwork required. Concerns were also expressed in the feedback that the paperwork takes time away from what should be the main focus of the job – looking after the children (Welsh Government 2019).

Childminding as a profession

4.15　Historically, the progression of childminding as a profession has evolved alongside the childcare and early years sector as a whole. However, the uniqueness of childminding has not been reflected in policies and strategies aimed at the sector.

Childminders have had to 'fit into' schemes which do not reflect their individual practices. Campbell-Parr et al. (2020) found that childminders felt isolated from the wider sector, support networks and other childminders. In their report they identified a number of ways in which these differences between childminders and the rest of the sector has implications for their development of a professional identity. The flexible and personalised approach that childminders use in their profession offers a different type of service to parents and children compared to group settings. For example, childminders are often praised on their adaptable approach to meet the needs of both parents and individual children. However, it is reported that what it takes to be a 'good childminder' is not well understood or documented. Sometimes this service to families can also result in childminders making decisions for the best interest of families and children, rather than for themselves as a business (for example taking on extra children and having to pay a childminding assistant due to loyalty to a family). Childminders are often lone workers, which can present difficulties compared to group settings, such as not being able to attend training and do paperwork during the working day and not having others to share issues with or seek guidance from (Campbell-Parr et al. 2020). The Scottish Government review 2022 also highlighted that there can be a lack of awareness of childminding and knowledge of what they do. Stedman and Lewis (2022) found that some childminders are of the view that childminding is still regarded as a low skilled job by some and that childminders often feel underappreciated. Hardy et al. (2022) found that while 84% of childminders in their study felt satisfied that they are valued by the families they provide care for, almost 69% disagreed that society valued their skills.

Pay and stability

4.16   As has been mentioned already, low pay is reported as an issue in several studies, but this is not unique to childminders alone. Research into the early years workforce in England found that a large proportion of childcare workers are struggling financially, with low pay and financial insecurity featuring as key issues. The childcare sector is also experiencing difficulties with recruitment, with issues hiring staff, particularly well qualified staff, as well as having an ageing workforce with concerns there will not be enough younger childcare workers entering the sector to replace those who will be leaving (Bonetti 2019). The Fawcett Society undertook a comparative literature review of six liberal welfare states, including England, Australia, Canada, Japan, New Zealand and Switzerland. It found that England falls

short on a number of different aspects when compared to the other countries. England is shown to have the lowest qualification requirements for childcare staff, as well as the lowest wages. The UK also has some of the highest fees for parents compared to other countries included in the review, with the lowest income two-parent households incurring childcare costs equivalent to 31% of their household income. Further to this, the review found that public spending on childcare in the UK is also at one of the lowest rates of the countries reviewed (Ville et al. 2022). There is also evidence indicating a fall in the number accessing childcare places in England. A Childcare and early years survey of parents undertaken by Ipsos Mori in 2021, found that the proportion of children aged 0-14 using childcare had fallen from 65% in 2018 to 57% in 2021. A similar decline was also seen in children aged 0-four (68% in 2021, down from 76% in 2019). It is likely that the COVID-19 pandemic has been a factor in this decline (Ipsos Mori 2022).

4.17   The National Survey for Wales findings outline that in 2019, 58 per cent of parents with children aged 0-4 and 51 per cent of parents with children aged 5-11 used childcare (either formal or informal). The survey findings also outline that in 2019, eight per cent of parents used childcare provided by a childminder. The National survey undertaken in 2022-23 asked parents the same questions relating to parents' use of childcare. However, these results are not yet available, and therefore it is not possible at this point, to compare any decline or increase in the take up of childcare in Wales with the Ipsos Mori survey findings.

4.18   In a report by Arad Research, Stedman and Lewis (2022) found that childminders surveyed reported low pay as an issue, in relation to the pay they receive themselves, as well as pay offered to assistants. Income was affected by the limit on places that can be offered, not being able to charge parents more for childcare, difficulties filling spaces and the costs and expenses of being a childminder. Some childminders also commented on their long working hours, often with no breaks.

4.19   Despite policy developments and political and financial investment in the childcare sector in the UK, there is some evidence that not all parents are aware of the support available to them from the Government. For example, it was found that a quarter of parents surveyed did not know that the Childcare Offer of 30 hours free childcare for three and four year olds in England was available through childminders. Some parents were also not aware that hours could be split between different providers (Department for Education 2018). Skipp and Hopwood (2017) found that funded early education places in England can actually cause some

challenges for childminders. For example, some childminders found that the funded provision was at a lower rate than their standard fee, meaning they would have to either accept this loss in income, or make up this loss in other ways (for example accessing other funding, increasing fees for non-funded hours and children). Clarke and Kalitowski (2018) also found that the most common reasons among childminders for not offering the 30 hours Childcare Offer was that the hourly rate was too low, and there was too much paperwork and red tape. There is also a mixed involvement of childminders in the Flying Start programme in Wales. Flying Start targeted Early Years support is available for families with children under four years of age who live in some of the most disadvantaged areas of Wales. The programme offers eligible families 12.5 hours of funded childcare a week for two to three year olds for 39 weeks of the year. However, in some local authorities childminders are actively involved in the Flying Start programme and deliver childcare places for eligible children, in other areas childminders have not been used to deliver childcare funded by the programme, and in some local authority areas childminding is viewed as an unsuitable option to deliver Flying Start (PACEY 2022b). Childminders can also face other challenges based on their location in Wales, with more childminders being found in urban areas. This may be due to challenges rural areas face in terms of employment opportunities and dispersed populations, meaning that childminders who, by their nature, deliver fewer places than other settings, are more sensitive to the changes and circumstances of their locality. There has also been links between areas with more deprivation having fewer childminders (Crocker et al. 2018).

COVID-19

4.20   PACEY has recognised the important role that childminders played during the pandemic, outlining in its reports that many childminders stayed open to key workers and continued to support and contact other families during the pandemic. However, the financial issues childminders went through during the pandemic was also acknowledged. Childminders interviewed by PACEY during the earlier stages of the pandemic, reported that they felt vulnerable and uncertain about the future and were concerned about how their business would survive. Although many were able to access financial support, this was not enough for many and did not cover their loss of income (PACEY Cymru 2020). Hardy et al. (2022) in their report on early years workers during the pandemic, found that in July 2021 childminders still

had a lower income than before the pandemic. Despite a high uptake of various financial support schemes and grants in England and Wales, such as the Self Employment Income Support Scheme (SEISS), Childcare providers' Grant, and the Coronavirus Childcare Assistance Scheme, childminders reported that this was still not sufficient to replace their usual income and many were pushed into poverty. It was also found that childminders included in the study had to resort to using personal savings, sell personal belongings and rely more on partners' income since the pandemic to make up for this shortfall. A lack of sick pay for childminders was also deemed an issue for those who had to self-isolate due to exposure to COVID-19 which had further financial implications for them. It was also found that the pandemic further contributed to the feeling of being an undervalued profession in society, with the 'key' or 'critical' worker status not applied to childminders, but applied to nursery and teaching staff, despite many childminders staying open to care for other key workers children. This created further difficulties for some childminders' ability to carry on working, for example their lack of recognition as key workers meant that their own children could not go to some schools impacting their ability to work.

4.21   In Arad Research's Year four evaluation of the Childcare Offer, some childminders reported increased isolation and feelings of loneliness since the pandemic with less opportunities to attend playgroups. Some childminders had also struggled during the pandemic and had made the decision to move jobs (within and outside of the childcare sector). Several childminders had to close their businesses during the pandemic and found work elsewhere and have not returned to childminding. There has also been a shift in the way parents have accessed childcare, with an increase in demand in some settings such as day nurseries, and a fall in some providers such as childminders (Glyn et al. 2022).

4.22   A recent briefing by Ofsted (2022) outlines some of the continued effects of the COVID-19 pandemic on early years providers, including childminders and nurseries in England. This was based on evidence collected as part of routine inspections of 20 nurseries and nine childminders between April and May 2022. It found that children's language and communication development was still affected, and children were still lacking confidence in social settings, with some children taking longer to settle into their setting. There was also evidence of impacts on physical development as well as children's development in anticipation of entering school. Childminders and nurseries were found to be taking important measures to help to

address these development issues with children. It was also reported that providers have had fewer two-year-olds than usual taking up funded places. It was suggested this could be due to families not receiving information about the availability of funded places by health and other professionals due to the lack of contact with these professionals since the pandemic, as well as parental anxiety about COVID-19 and so not taking up places. It was also found that local authority visits are still not taking place at the same rate they were before the pandemic, with calls and training taking place online instead of face to face, meaning childminders in particular may be receiving less support and guidance.

Initiatives to support childminders

4.23   Several papers have tried to address some of the challenges faced by childminders (and the wider childcare and early years sector) however some proposals have not been met with great support from PACEY. In July 2022 the Institute of Economic Affairs released '*Cutting Through. How to address the cost of living crisis'*. This paper included several childcare reforms to combat some of the issues faced by the childcare sector in England. These suggestions included:

- reducing or removing limits on childcare numbers;
- allowing payment for informal childcare i.e. by families and friends;
- abolishing the requirement for formal accreditation to become a childminder;
- a move towards more childminding agencies;
- reducing or removing regulatory requirements and oversight;
- allowing for accreditation set by private initiatives, parental oversight and quality comparison websites.

4.24   The ambition of these reforms is to ultimately reduce the need for government subsidy and funding for childcare costs (i.e. Childcare Offer, Flying Start etc.) which will in turn reduce the costs of childcare and bring prices down for families. However, in a statement by PACEY in September 2022, they criticise the paper for making incorrect assumptions, not addressing the genuine barriers faced by the childcare sector and producing proposals which will, rightly, be rejected by the sector. Instead, PACEY suggested that the Government needs to incorporate three key areas for change:

- Improved integration of family and children support services: this would require local and central government and decisions makers working to an integrated child-centred strategy.

- Reform of the early education and childcare funding system: issues with the current funding system include the low take up of the two-year-old offer, and underfunding of education entitlements for two, three and four year olds. The "Government must prioritise financial investment for those who need it the most and fill the current gaps in funding to ensure accessible and affordable childcare for parents and families".

- Building the Early Years Workforce: it is crucial to have high quality workforce in the sector. "We want to ensure that all staff are valued and are actively championed by national and local government". This will involve a workforce strategy to combat the current issue around low recruitment and retention rates, and barriers to continual professional development (Donohoe 2022).

4.25   The 'Better Childcare' report by MacDonald and Kelly (2022) raises similar issues and suggestions to address these issues, including strong measures to reverse the decline in childminder numbers by removing regulatory burdens; creating specific Early Years Foundation Stage (EYFS) framework for childminders; encouraging and investment in more childminder agencies with registration done through these instead of Ofsted; and having more flexibility to expand ratios in childminder settings. The Chief Executive of PACEY at the time commented on the report raising issues with the suggestions made. In particular, the incorrect assumptions that childminders feel overburdened by regulation, and the suggestion that agencies are a solution of the problems faced by childminders. As Bayram states, childminder agencies have existed for around eight years and so do not appear to be working, with only seven registered agencies in England – see also section 4.26. Instead, there needs to be a focus on the "chronic underfunding" of childcare places and education entitlements (Bayram 2022). In PACEY Cymru's report on de-registration of childminders, 13 out of 61 respondents interviewed said that something could have been done to keep them in childminding, the majority of these said they would have benefited from increased support of information, and a smaller number suggested less paperwork would keep them in childminding (PACEY Cymru 2017).

4.26   In a report by Natcen (2022) it was felt that communication and documentation was more targeted at the wider early years workforce, especially during COVID-19.

Childminders in the study suggested that concrete examples including targeted, childminders-specific information and guidance, having access to dedicated support (for example at the Local Authority), and making inspections shorter and more frequent would help to address some of these challenges. Childminders in this research also suggested that steps should be taken to improve the status of childminders, such as providing more information to parents on the role and training of childminders and coming up with a different name than 'childminder' to reflect the professional nature of the role (Uglow et al. 2022). Glencross et al. (2021) felt that a promotion of the benefits of childminding is needed, and misconceptions addressed, as well as suggestions that there should be more funding and clarity about funding available in order to encourage more families to use childminders.

4.27 One initiative which is hoped to help with some of the paperwork of childminders delivering the Childcare Offer for Wales is the new national digital service to deliver the Childcare Offer introduced in January 2023. This has been introduced in response to issues raised around local authorities having different systems to deliver the Childcare Offer. This has been especially challenging for settings who must process payments from parents and families who live in different local authority areas. The new service will unify the system and will be the same across all authority areas in Wales. It has been designed to be user friendly for those who are not confident with technology, and training will be provided on how to use the new system (Welsh Government 2022b)

4.28 Stemming from the More Great Childcare policy document by the Department of Education (2013), childminder agencies were trialled in England, with a role out in 2014 by the Department of Education. Childminding agencies are organisations able to register childminders and provide a range of services to its members and parents. This can include advertisement, marketing, training and development support to childminders as well as matching services to parents.[10] A trial of childminding agencies in 2013 found that when gauging initial views on childminder agencies, there were negative perceptions among childminders regarding agencies and that the majority of childminders wanted to stay independently registered with Ofsted (Yates et al. 2014). NatCen (2022) found mixed views in relation to childminder agencies, some praised the provision of training and quality assurance visits which were seen to be less stressful than Ofsted inspections. Others raised

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[10] Childminder agencies | PACEY

concerns about the risk of losing control over running their setting and the damage to reputation if a childminder received a negative Ofsted score or a perceived lack of external quality assurance (Uglow 2022).

4.29   In a PACEY report on childminder sustainability in England and Wales, Campbell-Parr et al. (2020) suggest that childminding as a profession is reliant on the development of relational agency among childminders. This involves building knowledge around who to seek help from around issues to do with childminding and sharing the knowledge that they have built up themselves. In the Scottish Government Childminding workforce trends report, isolation was seen to have a negative impact on childminders. However, those who had received support from Childminder Support Workers, which is only available in some local authority areas in Scotland, felt that this had been very beneficial. A recommendation made in the report was to consider how to best support the development of more support and peer mentoring opportunities. This report also made further recommendations to help those in the childminding profession including:

- providing more training around running a small business;

- considering flexibility around ratios;

- considering if any action is possible to support childminders in relation to maternity and sick pay;

- considering a system where local authorities employ more childminders directly and:

- having a programme of promotion of childminding to attract new people to the profession and address any negative perceptions (Simpson et al. 2022).

4.30   An example of a successful support group among childminder communities can be seen in the 'Magic Minders' support group based in Worthing. This is a volunteer group developed to support registered and prospective childminders. It also offers support to parents and helps match parents up with childminders that suit their needs. This helps childminders develop their business while networking with other professionals and parents within the local area and raising the public profile of childminders. The group also supports the socialisation, learning and development of minded children, with group activities and events run through the group for childminders and children to meet and interact. The support group also utilises their skills, contacts and experience to arrange training and development events for

members. Groups such as these are integral to the longevity of childminders and create a network of support and development (Webster 2017). In May 2023 England is launching a childminder mentor programme. This will involve experienced early year professionals providing support to help children recover from the COVID-19 pandemic. Participating childminders will get support and advice from mentors who have at least three years' experience in the childminding sector and there will be an opportunity to network with other childminders in the area who are also part of the programme. It will be interesting to explore evidence on how this scheme acts as a source of mentorship and networking for childminders when the programme starts (Department for Education, 2023).

4.31   Wales does not currently have a full workforce registry for all Childcare, Play and Early Years (CPEY) – although services including childminders are required to register through CIW. Scotland however became the first country in the UK to have a fully regulated early years workforce. This is made of three different registries: the General Teaching Council (for early years teachers), Scottish Social Services Commission (SSSC) (for childcare workers in day care service), and Care Inspectorate (for childminders). For childminders in Scotland there are no specific qualification requirements for registering with the Care Inspectorate. Recommendations from the Independent Review of Scottish Early Learning and Childcare (2015) were to make induction or pre-registration a requirement to childminders registry. It also called for childminders to be registered with the SSSC, and so having the same conditions as the rest of the early years workforce, this would include having required qualifications and codes of conduct. It was thought this would raise standards of childminding services and advocate for better pay and conditions for childminders themselves. However, under the current review of the registry service in Scotland, the inclusion of childminders in the SSSC registry is not being considered. It has been recognised that childminders have a unique role compared to other childcare providers, particularly being the sole worker in their setting it can be more challenging to attend training and gain qualifications.

Lessons outside the UK

4.32   Kaneko et al. (2020), conducted a global review of Home-based childcare (HBCC) support initiatives across 11 countries (including the UK with PACEY as it's support programme). They argued that quality HBCC allows for better child development

outcomes and provides benefits for families and society (such as women's economic empowerment and the creation of quality jobs). Some examples of useful aims and practises of the support programmes they examined included increasing the recognition of HBCC; responding to community needs through building sensitivity and understanding of the culture and make up of local communities; improving responsive caregiving via parent-provider relationships; utilising a centre of excellence model where providers could observe and learn best practices; providing coaching and supervision through phone calls, messages and regular meetings; building up social networks among providers; and providing financial resources support such as stipends for snack and materials, and zero-interest business loans. The report outlined a number of recommendations for the global HBCC sector, these included:

- Donors and policymakers should increase financing for systems of support and governments should provide more funding to HBCC providers.

- Embed support programmes for HBCC into the public sector to increase scale and sustainability.

- The early childhood care and education sector should establish a global learning community of existing support programmes for HBCC.

- Develop guidance that can address standards, competencies and tools to define and measure quality for HBCC across a range of diverse settings.

- Further research should be undertaken to answer outstanding questions.

4.33 This report provides a useful insight into a more global picture of childminding, demonstrating that similar challenges are faced elsewhere in the world, but also showing that the UK is advanced compared to some other countries when it comes to government support and bodies. A sample of other literature from outside of the UK was also examined, however models are quite different across the globe and so no appropriate best practise initiatives or examples that could be adapted by the UK were found.

4.34 In summary, in terms of initiatives and support, the main recommendations and suggestions as found by the literature which may be relevant to the Wales picture of childminding are as follows (including recommendations made by PACEY):

- Adequate funding is needed, and funding gaps should be addressed to ensure the availability of affordable childcare;

- Improved integration of family and children support services which would involve local authorities and central government working more closely together;

- A workforce strategy could be developed aimed at building the Early Years Workforce to combat issues around low recruitment and retention rates, and barriers to professional development;

- Increased support is needed to help childminders deal with paperwork and other administrative processes;

- Provide more training around running a business to childminders;

- Consider flexibility around ratios;

- The benefits of childminding should be widely promoted to attract new childminders and address misconceptions about the role;

- Support networks or group activities amongst childminders should be supported and facilitated, examples such as Magic Minders and the mentoring scheme in England could be looked at for Wales.

4.35   To conclude, although there is relatively little research on childminding when compared to other professions in the childcare sector, a review of the available literature has been useful in providing a picture of what exists and where there are gaps in the literature. More research is needed in the following areas:

- Experiences of childminders in Wales;

- Views from parents and families on their experience of using childminders;

- Data on the diversity of childminders;

- Views from childminders on what would help to support them in the profession/keep them in the profession;

- Long term impacts of COVID-19 on childminders.

4.36   This chapter has presented what is already known about childminding, the following sections now present the research findings of this study and begins to address some of the gaps identified above.

5. Views of Parents

5.1 This chapter discusses parents' views on why a childminder might be their preferred childcare option and the issues parents report in accessing childminders. Evidence presented is based on data collected via the National Childcare Sufficiency Assessment Parent Survey (referred to hereafter as the parent survey) and findings from interviews with three parents who were using a childminder at the time of the research. Further detail on the approach taken to interpret this evidence can be found in the methodology chapter (chapter 2).

Parents' preference and reasons for using a childminder

5.2 Some parent survey respondents provided additional text within their responses stating that a childminder was their preferred childcare option but did not offer reasons as to why this was. However, more in-depth evidence collected via parent interviews revealed a number of reasons why some parents prefer to use a childminder rather than any other childcare setting.

5.3 Parents interviewed noted that they liked how it was just one person looking after their child rather than multiple members of staff as they believed it would be in a larger setting (e.g. nursery settings). This was because they thought their child was likely to receive more one-to-one support as there are fewer children in a childminder setting.

> 'I like it that there is only a small group of children. I find that it's more one-to-one compared with in a nursery or other childcare facility.' Parent interviewed.

> 'You can see that everything my childminder does revolves around the children. They get a better bond with the children.' Parent interviewed.

> 'A [day care] nursery feels like a baby version of a school. There are so many children. I felt like children just get left to their own devices. Whereas it's a lot more structured with the childminder. They'll go out to places. They'll sit down and do arts and crafts. They'll read books together. It's quite personal.' Parent interviewed.

5.4 Another perceived benefit of a childminder, noted by a parent interviewed, is the reassurance they gained from the knowing that when they talked to their childminder about the welfare of their child, they were talking directly to the person who had day to day responsibility for looking after their child. This, in their view leaves little or no room for any miscommunication, which, may not necessarily be

the case in a larger childcare setting where similar messages may be relayed to one of many childcare professionals who look after their child, or to an individual who may oversee or manage the care provision delivered by others, but may not necessarily deliver the care themselves. This was particularly important for one parent interviewed whose child had special requirements, including allergies.

> 'If there's a message I need to pass on, it's going directly to the person that's caring for my child. It's not having to be passed on to another person.' Parent interviewed.

5.5 The opportunity to provide their child with a 'home from home feeling' was another reason why parents who were interviewed noted that they preferred a childminder over other forms of childcare provision. It was important to these parents that childcare felt less formal than what they perceived a nursery setting to be, whilst still offering routine, structure and supporting their child's development.

> 'I like that home from home feeling. She [the young child] doesn't feel like she's going to school. She just feels like she's going to the childminder's home to look after her.' Parent interviewed.

> 'My childminder is absolutely amazing. [child] loves going there. It's like he's just going to a friend's house. That's how he sees it. He doesn't see it as going to a nursery.' Parent interviewed.

Accessing a childminder

Lack of awareness and information

5.6 Challenges in accessing information regarding local childminders was a common theme identified from parents' CSA survey responses. In some cases, parents found it difficult to find/access information they required regarding local childminders, suggesting a lack of readily available information for parents seeking childcare. One parent stated that they 'have no idea how to access childcare' and another parent said they 'don't know how to find a government registered childminder for when our child turns three to take advantage of the free childcare scheme.' Furthermore, when one parent tried to use family information services, they found the website was not user-friendly and lacked information on childminders.

'The family information service is very difficult to navigate and doesn't give enough information about childminders to be able to make an informed decision. The website is slow and fiddly. In the end, I lost patience and felt I needed to pay more than I can afford on nursery fees.' Parent survey respondent.

General lack of childminding provision

5.7   A perceived lack of childminding provision was a common theme identified from parents' survey responses. For example, respondents noted that they found it difficult to find childminders in their area, with some commenting that childminders they were aware of had now closed /cancelled their registration. The survey findings also indicate that parents who could find local childminders were not always able to access any of the childcare places they provided. Surveyed parents acknowledged that childminders are a popular choice amongst other parents and the high demand for places often makes it difficult to find a childminder with availability. Furthermore, parent survey respondents remarked how the childminders they contacted often had long waiting lists, so that even if a space became available there was already a queue of parents waiting to take it up. One parent summed up the situation by simply saying 'there are not enough registered childminders in this area.'

> 'We were looking for a childminder setting for our one year old but all of them were full. Including ones that were a 30 minute drive away.' Parent survey respondent.

> 'There are always people asking about childminders, but they seem to always be fully booked.' Parent survey respondent.

> 'Childminders seem to be more popular, however they also have extremely long waiting lists.' Parent survey respondent.

5.8   This was supported by one parent interviewed who explained that, in their area, childcare provision seemed to mainly consist of nursery settings rather than childminders. Furthermore, the local childminders they were aware of did not have enough availability to offer the number of days the parent required.

> 'Where I live there seems to be a lack of childminders. There seems to be plenty of nurseries but not many childminders. Out of all the childminders I contacted, only two of them could offer me two days a week. And I searched as far as a 25-

minute drive from my house. My current childminder is a good 15 minutes away.'
Parent interviewed.

5.9   The parent survey findings suggested a lack of available childminders to provide childcare at particular times when parents require the provision. For example, respondents explained that some childminders do not work on certain days of the week, making it difficult for parents to access childcare on the days they require. Similar issues were raised by respondents who found it difficult to find a childminder who was open during the school holidays because some childminders only work during the school term-time.

> 'My childminder is fantastic the only problem being she doesn't work Fridays - which makes Fridays a particularly tricky time to manage.' Parent survey respondent

> '[There is a] lack of childcare available in school holidays for children under four years old as many childminders are term time only.' Parent survey respondent

5.10   Furthermore, some parent survey respondents highlighted a perceived lack of available childcare during evenings and/or weekends. With one parent noting that this causes 'difficulty for parents who work in the retail/hospitality sectors.' This was also raised as an issue by one parent interviewed, who reflected how a lack of childcare during evenings and/or weekends creates a challenge for parents who work shifts. This parent explained that they had to change their job due to this childcare issue they faced.

5.11   It should be noted however, that a lack of available provision during evening and weekends is an issue that relates to most childcare provision not just childminding.

> 'I wanted a childminder for evenings and weekends, but that doesn't seem to be available…So, in terms of my job role, I'm very much restricted in what I can do because of childcare issues.' Parent interviewed.

5.12   Another point raised by survey respondents relating to availability of provision was the perceived lack of childminders being able to offer the wrap around care parents required. Respondents tended to mention a lack of childminders who could offer a drop off and pick up wraparound service to and from the school their child attended.

> 'Couldn't get anyone to care for children when youngest was at home in the afternoons. I was hoping to find a childminder who could collect children from school and care for them until I finish work, but nothing was available. [Not being

able to find a suitable childminder] has prevented [me from] finding work.' Parent survey respondent

'It is incredibly difficult to find a provider that can offer wrap around care for school nursery attendance. I was fortunate enough to find a childminder that could accommodate my child, but the spaces are very limited.' Parent survey respondent.

5.13   This challenge was echoed by one parent interviewed who explained that 'it was really hard to find somebody that would do an after school pick up from the school; 'and finding somebody with space is even harder – spaces are full.' Parent interviewed.

Lack of suitable childminding provision

5.14   A perceived lack of suitable childminding provision which meets parents' needs was a common theme identified from parents' survey responses. Parents expressed how they found it difficult to find a childminder who is open early enough in the day to enable them to drop their child off before commuting to work and late enough that they can pick their child up after a full day working.

'No childcare available before eight am which results in difficulty to start work for normal office hours once you consider the commute.' Parent survey respondent

'I don't get home until late sometimes because the roads are so bad at that time of day and having contacted [name of childcare] they don't open early enough of a morning to take my child so I can commute to work.' Parent survey respondent

5.15   However, one parent interviewed suggested that, in their experience, childminders tend to be more flexible with drop off and pick up times compared with a nursery setting. This parent noted that the nursery they use for their one child has charged them for being 20 minutes late picking up their child when they got stuck in traffic travelling from work. On the other hand, the childminder they use for their other child has not charged them when they have, on the odd occasion, been late picking up their child. Despite this example of a childminder being more flexible than a nursery, this still suggests that the childcare opening/closing times do not always match parent's requirements. However, once again, it should be noted that this is an issue that relates to all childcare provision not just childminders.

5.16   Some parent survey respondents expressed difficulties in finding a childminder who could cater for their child's specific needs, with one parent noting that there are 'not enough spaces, and nobody available as a special needs childminder'. Another parent explained: 'My disabled child requires staff trained in his bespoke multidisciplinary programmes to meet their specific needs e.g. toileting and communication. Generic care services e.g. childminders, holiday clubs, etc. are unsuitable for this.' One parent interviewed also reflected on how they chose a nursery setting for one of their children because they could not find a childminder 'who could cope' with their child's health conditions.

Lack of Welsh-medium childminding provision

5.17   The lack of Welsh-medium childminders was also a concern for some parent survey respondents, this was particularly the case for one respondent who highlighted the importance of Welsh-medium childcare for first language Welsh-speaking families, like theirs.

> 'Welsh medium childminders are booked up in advance (have a waiting list) and are very limited. It is important to us as a family to have a first language Welsh setting for our children as we are first language Welsh, many of the childminders are not fluent or confident in first language Welsh.' Parent survey respondent

5.18   Furthermore, these survey respondents who were seeking Welsh-medium childcare noted that not only was there a lack of Welsh-medium childminders in their area, but finding one that meets the individual needs of parents can be even more challenging. For example, one parent commented that 'finding a childminder who speaks Welsh is difficult enough, but trying to find a Welsh speaking childminder who also has available space on the days that work for our working week is very difficult'. Another parent said it was 'difficult finding a Welsh speaking childminder in the town that also opened at 7:30am.'

5.19   As outlined in section 3.11 Welsh medium provision across all childcare settings in Wales has increased since 2018. However, Welsh medium provision amongst childminders has declined sharply during this time making it more challenging for parents to access Welsh medium childminding services in many areas.

Lack of available places for siblings

5.20 Challenges in securing childcare for more than one child was a common theme identified from parents' survey responses. One of the main issues raised was the lack of available places for siblings, with parents' responses suggesting that childminders are sometimes unable to accommodate siblings due to number of places which are restricted by childminder ratios. As one parent survey respondent explained: 'I had twins, and it was really difficult to find a childminder who could cater for both children at the same time.'

5.21 Challenges finding a childminder that can accommodate siblings, can lead to some parents having to use different settings for each of their children. In some cases, this has meant parents accessing a childminder for one child and day care service for their other child, despite their preference to have both with a childminder. Furthermore, using different settings for different children can create logistical issues for parents when dropping off or picking up their children from childcare. For example, one parent interviewed explained the extent of this issue:

> 'It's been an absolute logistical nightmare having the two children going to different settings. The amount of time I've been late collecting one or the other. But thankfully both settings have been understanding.' Parent interviewed.

Cost of childcare

5.22 The affordability of childcare was a common theme identified from the parent's survey responses. Although many parents referred to the cost of childcare generally, commenting on how they perceived it to be expensive, references were also made specifically to childminders. Within these responses, there appeared to be a mixture of views. Some parents believed childminders to be more expensive than another childcare setting, with one parent commenting that 'childminders literally charge for everything'. On the other hand, other parents perceived childminders to be more affordable option as 'they tend to be cheaper than nurseries.'

5.23 Childcare affordability issues appear to be exacerbated for parents with multiple children, with childcare costs significantly increasing for parents requiring childcare for more than one child.

5.24   In many cases, childcare affordability issues have led parents to use informal childcare provided by family members (often grandparents). As one parent survey respondent explained:

> '[I] rely heavily on my parents for childcare (which is difficult) as I cannot afford a childminder for my oldest child as well as paying for my one year old's childcare whilst I'm at work.' Parent survey respondent

5.25   Furthermore, parent survey respondents reflected on how the expense of childcare impacts their decisions relating to work/employment. For example, one parent commented 'I had to reduce my work in health care to reduce some costs'. Another parent survey respondent commented on how they felt the expense of childcare made them think 'it's not worth working', with another parent further explaining that childcare costs mean they are faced with the dilemma of 'either you pay all your salary to someone to look after your children or you stay at home, no career and no money.'

> 'Parents (notably women) have to reduce their hours / go part time / give up work because it becomes not financially viable to work and pay childcare costs.' Parent survey respondent

5.26   One work-related decision made by some parents is to become a childminder themselves. Responses to the survey and interview data collected suggests one reason behind this decision was to enable these parents to overcome their own childcare costs as they believed they could look after their own child/children whilst earning an income through looking after other parent's children. However, whilst one parent who had become a childminder acknowledged that 'childcare is too expensive for families', they also noted that childminding 'does not provide enough income to sustain a business.' Further to this, some stakeholders were of the view that flexible working arrangements across a range of different jobs has enabled parents to consider other ways of working from home while also looking after their children, thus reducing the potential supply of childminders – see also section 6.4.

5.27   Whilst parents acknowledged the childcare funding available to eligible parents through the Childcare Offer, some parents explained how they found it logistically difficult to access the funded childcare available because of a lack of wrap around care.

> 'As much as we appreciate the 30 hours - two hours a day at nursery is incredibly difficult to manage logistically when working full time. Without a childminder and

support of family, there is no way we would be able to access it.' Parent survey respondent

5.28   Additionally, some parents reflected on how the Childcare Offer would be most beneficial if it were to be available to parents earlier than the term after their child turns three years old.

'The 30 funded hours is helpful but comes too late to be meaningful in relation to women at work - it needs to assist fund childcare from when parents return to work (i.e. from nine months).' Parent survey respondent

Accessibility of childcare provision

5.29   Many of the themes relating to accessing provision raised throughout this chapter are not unique to childminding provision. Evidence within parent responses to the survey suggests that these access issues relate to childcare provision more generally. This is supported by data collected via the National Survey for Wales (Welsh Government, 2018-19) which reported that 26% of parents who responded to the National Survey for Wales thought that finding childcare that works for them around working hours was difficult (compared with 74% who found it easy).

5.30   Similar issues were also raised in a report discussing parents' beliefs, behaviours and barriers to accessing childcare and early education (Welsh Government, 2021). Thus, one recommendation outlined within this report was for the Welsh Government and local authorities to consider what they may be able to do to support sustainability and growth of the childcare sector.

6.   Experiences of childminders

6.1   This chapter explores the experiences of childminders and the challenges they can face. The sections that follow are primarily informed by interviews, group discussions and a survey conducted with childminders, insights shared by PACEY, and group discussions held with local authority staff.

Reasons for becoming a childminder.

6.2   During interviews, Childminders were asked why they decided to become a childminder. Findings revealed the main reason was based on their circumstances at the time of making this decision. One common scenario was individuals choosing to become a childminder in order to generate an income while also being able to look after their own children or grandchildren.

> 'The positive was I was able to care for my own children while I was working.' Childminder interviewed

> 'My previous job – teaching - was taking away time from being with my own children – childminding was a lot more flexible and worked better for me with a young family.' Childminder interviewed

6.3   The decision to become a childminder also appeared to be driven by issues parents faced in relation to accessing childcare. Many of these access issues explained by childminders interviewed are similar to those raised by parents as discussed in section 5.7-5.27. These access issues included the expense of childcare, which is exacerbated for parents with more than one child; and a lack of availability, which in some cases seemed to be more of a challenge for those parents who preferred to use a childminder (see section 5.3-5.6 which outlines parents' reasons for preferring a childminder over other childcare settings). Consequently, these challenges in accessing childcare led some parents to register to become a childminder themselves in order to resolve their childcare issues.

6.4   However, one stakeholder suggested that the COVID-19 pandemic has led to more flexible working opportunities (e.g. working from home) which has potentially made it easier for parents to secure employment which also enables them to look after their children or to align their working patterns to fit around their childcare arrangements. Therefore, this stakeholder suggested that, as a result, parents may

now be less likely to decide to become a childminder in order to look after their children whilst earning an income.

6.5   Some childminders interviewed expressed how they were attracted to the job of childminding because not only did they want to work with children, but they liked the idea of owning their own business (discussed further in section 6.9-6.13) which outlines the benefits of childminding). Furthermore, a few of these childminders already had a childcare/early years qualification and were keen to utilise this whilst enjoying the benefits of owning their business.

Length of time childminding and future plans

6.6   Of the childminders who responded to the survey, 187 indicated how long they had been childminding for. Of these, just under two thirds (65 per cent - 121 out of 187) had been childminding for 10 or more years, with a further 11 per cent (20 out of 187) having been childminding for seven to nine years. This suggests a wealth of childminding experience amongst the majority of those surveyed and that for these individuals childminding is a long-term career option. A further 11 per cent (21 out of 187) had been childminding for four to six years and 12 per cent for one to three years. Only two per cent (three out of 187) had been childminding for less than 12 months. The relatively small proportion of respondents who had only just started childminding possibly reflects the fall in the number of newly registered childminder in recent years as discussed in chapter 3.

6.7   When asked what their plans were for the next five years, just over half of childminder survey respondents (54 per cent – 101 out of 187) said they plan to continue working as a childminder. The remaining respondents either said they planned to leave childminding within the next five years (31 per cent - 58 out of 187) or that they did not know what their plans were (15 per cent – 28 out of 187). Of those who said they planned to leave childminding, the largest proportion (38 per cent – 31 out of 82) planned to retire within the next five years. A further 16 per cent (13 out of 82) planned to cease operating as a childminder to work in another job within the childcare sector, which shows the displacement of childminders to the wider childcare sector. Other plans included working in another job outside of the childcare sector (10 per cent – eight out of 82) or returning to education (two per cent – two out of 82). The remaining 33 per cent (27 out of 82) noted they did not know what their plans were.

6.8   Findings from interviews with childminders suggest a few reasons why this displacement of childminders to the wider childcare sector is taking place. These reasons tended to be centred around some of the challenges faced by childminders which are discussed further in sections 6.14 to 6.87. For example, one childminder explained how all the onus of dealing with the paperwork falls on them, whereas they believed this responsibility would be distributed across more members of staff if they worked in another childcare setting. When referring to the risk assessment paperwork they were required to complete, another childminder explained how 'it seems easier to be in an external setting, where the responsibility of health and safety is off my shoulders.'

Positives of Childminding

6.9   The role of childminders is an important one, providing a vital service for parents and children. Childminders often offer a flexible childcare option, closer to parents' homes and workplaces and in a home environment which is preferred by many parents (see section 5.2-5.5) for more detail on parents' preference and reasons for using a childminder.

6.10   Childminders interviewed outlined what they enjoyed about their job and what they perceived the benefits of childminding to be. They reflected on how childminding can be an excellent career choice, giving people the opportunity to work from home and build their own business. Many childminders appreciated the freedom and flexibility this provided them with, enabling them to set their business up how they wanted, for example, choosing the times they work and the activities they do with the children.

> 'I can choose what I do and when I work. I like the freedom of it.' Childminder interviewed.

> 'Great flexibility wise and follow children's interests and go with the flow. There are no time restraints like in the classroom.' Childminder interviewed.

> '…the adventures we go on and utilising outdoor space is definitely [one of] the most positive things to being a childminder.' Childminder interviewed.

6.11   In addition to this freedom, one childminder explained how having the ability to adapt plans from day to day depending on what the children would like to do and what is happening each day was important for them. 'For example, if there was a

playgroup session running that day which childminders can attend, I could decide at short notice to take the children there' – childminder interviewed. For this childminder, they felt that running their own business enabled them to make decisions such as these which they would not be able to do if they were employed within another childcare setting.

6.12 One childminder interviewed noted that, in their view, childminding settings can benefit the social development of children as they are more likely to interact with children of different ages than may be the case in other settings.

'The positive is that you see the children adapt and change because of the different ages and abilities of children. Within this [childminding] setting it benefits the child to be around different ages as they learn that they may need to help out or wait to do certain activities.' Childminder interviewed.

6.13 Many childminders interviewed noted that a key benefit of childminding for them personally was that they found the work to be very rewarding and spoke of the pride they experience in seeing children learn and develop in their care and how privileged they felt to be trusted by parents to care for their children.

'I love being with the kids and supporting families. I've been able to support families through some difficult times and that is a privilege. I have babies at the moment and to be trusted with them is a real special part of the job.' Childminder interviewed.

'Watching the children grow and being such an important role model in their lives. Because I don't have my own children I try and put that love and care into other children. I'm watching [name of child] grow into this beautiful girl and it is the best feeling in the world.' Childminder interviewed.

'Watching the children, I have had from six months on grow and develop. You are important to that child and their family and it's an honour to be able to be trusted with those children and to educate them, it is a privilege. I absolutely love my job.' Childminder interviewed.

Challenges childminders face

6.14 While childminders acknowledged that the job can be incredibly fulfilling, they also reflected on how it is not without its difficulties. Childminders explained that they face a range of challenges, from pre-registration onwards, as the rest of this chapter

outlines. Evidence for this chapter is based on childminders survey responses and follow-up interviews.

Registration

6.15   There are several steps to take before being able to work as a childminder. The process begins with attendance at a briefing session, held by PACEY or local authority Family Information Services to learn about the process and requirements. Next, there is childminder pre-registration training for home-based childcare, with units on 'Introduction to home-based childcare' and 'Preparing for childminder practice'. This training is delivered online and is assessed through a portfolio of work. The final step is to submit an application to CIW, which includes a health reference from the applicant's doctor, details of a DBS check and details of paediatric first aid training and pre-registration training certificates.

6.16   PACEY reported that the process of becoming a registered childminder has become increasingly complex, with a greater number of requirements and higher costs involved. They believe that this presents a significant challenge for individuals looking to enter the field, potentially discouraging some from pursuing a career as a childminder. Stakeholders interviewed felt that some of the recent registration requirements introduced e.g. the new qualification units required to comply with the 2019 qualification framework can make it difficult for some people to get started in the profession. Some childminders interviewed, who had been operating for several years also expressed this view or at least believed that it was easier to register as a childminder when they started compared to new entrants these days.

6.17   According to PACEY, the costs of pre-registration training for individuals looking to become childminders usually falls on the individual. Some local authorities cover these costs and over the years there have been ad hoc schemes to cover the pre-registration training. However, in cases where this support is not available, the set-up costs associated with childminding can be a major barrier for individuals who consider becoming childminders and / or may contribute to the financial vulnerability that some childminders face once their business starts operating.

6.18   Childminders and PACEY also told the review team that the process of becoming a registered childminder can take a significant amount of time, with the journey estimated to last anywhere from six months to, in a few cases, three years. This extended time frame is due to various requirements that must be met before an individual can become registered (as set out in 6.5). This can be a barrier for some

individuals, as it requires a significant investment of time and effort and may coincide with a time when they might have to make changes to their home and / or purchase various items e.g., toys and safety gates, to make their home suitable for childminding.

6.19   The journey to become a registered childminder can be long and complex, requiring a significant investment of time, effort and potential financial cost. Local authority representatives interviewed also made the point that some of the potential childminders they have worked with found the registration process overwhelming and confusing, leading to them feeling discouraged and looking for other employment opportunities.

National Minimum Standards (NMS) ratio of adults to children

6.20   Participants in the local authority group discussion highlighted the need, in their view, for more flexibility and support for childminders with regards to the ratios set out in the National Minimum Standards for Regulated Childcare11. The NMS state that childminders may care for 10 children up to 12 years of age; of those ten children, no more than six children under the age of eight, of whom no more than three may be under the age of five. Group discussion participants noted that childminders in Wales have less flexibility with regard to ratios than those operating in England and Scotland. They were also of the view that the inflexibility of the current ratios for younger children adversely affects childminders' businesses and financial viability.

6.21   In some regions of Wales, childminders were historically allowed to send a request to CIW to apply variations to the ratios of children they could care for during a typical day. Examples of requests submitted included a need to apply variations to allow for short overlaps between drop off and pick up times (e.g. relax the ratios required during half an hour a day to accommodate this overlap). Other examples included requests to vary the ratios in order to support short-term childcare needs for families (such as caring for siblings, accommodating changes to work schedules, or providing additional childcare during holidays). Requests for these variations were intended to support consistency of care.

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[11] [Regulations and National Minimum Standards: Childcare and play services | Care Inspectorate Wales](#)

6.22   The potential to introduce or reintroduce increased flexibility of this nature in the application of ratios was discussed in group meetings with childminders. Most of the childminders noted that they would be interested in a return to this increased flexibility, especially to if it enabled childminders to work together and cover for each other during holidays or sickness. However, although there was an interest in opportunities to relax the ratios at certain times, there was no desire among childminders consulted to increase the overall number of children that could be looked after.

> "It is challenging not having any flexibility in the ratios of under 5s. For example, unable to offer occasional extra hours to families already with me due to being full or continuation of care for siblings whose families already use my service". Survey respondent.

> "We have no flexibly in numbers like they do in England. So, I have to turn people away if they overlap even for the shortest amount of time". Survey respondent.

6.23   Although childminders are not currently allowed to relax the staffing to child ratio within their settings for any period of time during the day, it would appear that some childminders do. CIW inspection reports reviewed refer to NMS breeches that have occurred in some childminding settings. Some of these were reportedly for short periods of time where children overlapped with each other. This further demonstrates the issues some childminders can have with a lack of flexibility in NMS ratios. However, it should be noted that some of these NMS breeches were significant and are not condoned.

6.24   The survey questionnaire distributed to childminders, listed aspects of managing a childminding business that had previously been identified as potential challenges – i.e:

- Obtaining Planning permission;

- Accessing training;

- Ability to accommodate / meet the high demand for childcare places;

- Low demand / not being able to fill the childcare places I have available;

- Costs and expenses of running a childminding business;

- Accessing business support;

The survey questionnaire also listed aspects associated with working as a childminder that had previously been identified as being potentially challenging – i.e.:

- Career progression opportunities;

- Level of paperwork and administration;

- The need to use IT/ a computer / internet;

- Level of income earned;

- Hours worked each day / week;

6.25   Childminders were asked to rate on a scale of one to five the extent to which they considered each of these to be a challenge or not: one being not a challenge at all and five being a considerable challenge (there was also a 'Not applicable' option). Respondents were then presented with the same list of potential challenges again and asked whether any of these had become easier or more challenging over the past three years. Answer options included 'Easier', 'More challenging', 'No change' and 'Not applicable'. The sections that follow outline the survey responses to these questions.

Planning System

6.26   The National Minimum Standards set out adult to child ratios.[12] Depending on ages, a childminder can look after up to ten children aged up to 12.[13] However, to accommodate more than six children, a childminder may require planning permission. Childminders and other stakeholders noted that gaining planning permission can be both a complicated and costly process, and, according to the childminders interviewed, the need for planning permission appears to vary according to where in Wales they are located.

6.27   Whether or not planning permission is needed also depends on the individual circumstances. The most recent guidance related to local planning on childcare

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[12] [Regulations and National Minimum Standards: Childcare and play services | Care Inspectorate Wales](#)
[13] The maximum number of children for whom a childminder may care is as follows:
- Ten children up to 12 years of age;
- Of those ten children, no more than six may be under eight years of age.
- Of those six, no more than three may be under five years of age.
- Of those three children, normally no more than two may be under 18 months of age, although exceptions can be made for siblings.

dates from 2016[14] and sets out that planning permission may be required if 'the overall character of the dwelling will change as a result of the [childminding] business', which could be from a 'marked rise in traffic or people' or if the business would 'disturb neighbours at unreasonable hours'. However, the guidance for local authorities states.

> "[CIW] Inspectors determine if premises are safe and suitable for the provision of care, taking into account the maximum number of children that a childminder will look after at any one time and the available space for each child. If planning authorities consider, in the light of the advice set out above that planning permission should be required for an individual to use their home for child minding purposes, then unless there are specific planning reasons for doing so through conditions, they should not specify or restrict the number of children to be minded".

6.28   Just over half of the childminder survey respondents (94 out of 187) noted that planning permission, and any challenges associated with this, was not applicable to them. Most of those who had sought planning permission however, noted that the process had been challenging. Nine per cent (16 out of 187) of all survey respondents, rated obtaining planning permission as a considerable challenge, offering it a challenge rating of five out of five, and a further three per cent (six out of 187) offered it a challenge rating of four out of five. Furthermore, 10 per cent (18 out of 187) said that obtaining planning permission has become more challenging over the past three years.

6.29   These results suggest that many childminders have not had experience of dealing with planning permission issues, but for those who have, the process appears to have been challenging and that the level of the challenge is increasing.

6.30   One of the local authority representatives consulted referred to a new childminder who almost pulled out of the registration process as they were told they would have to complete a full planning application which they couldn't afford. The local authority representatives noted that on that occasion they were able to support the childminder's planning application. However, the representatives also referred to examples where planning permission has been denied to some childminders

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[14] Childcare and planning (CL-01-16) | GOV.WALES and Planning permission: childminding | GOV.WALES

wishing to register their service and outlined that this can be a big financial loss to the individual involved and serve as an example that may deter other potential childminders from even considering registering. Some childminders also referred to the costs involved, one noted that the cost of applying for planning permission to enable them to accommodate 10 children was in excess of £850.

6.31   Some further examples of planning permission experiences reported by childminders are summarised below.

Examples of challenging experiences with the planning system

"Unfortunately, I have had a massive challenge with planning permission. The process has taken 10 months and now the conditions I have to operate within are awful to the point I wish I hadn't of applied for it. I am registered to have 10 children but can only have six including my own without planning permission. One of the restrictions placed upon me as part of the planning agreement is that I can only use my garden between 10am and 4pm which is completely unreasonable and goes against the guidance of allowing children outdoor play, the UNCRC and child's rights. This has limited rather than increased the number of children I can have and the ability to offer continuity of care for siblings etc." - Childminder Survey respondent

"I find it incredibly frustrating that in order to take on an assistant that will allow me to fill additional spaces I have to apply for planning permission, yet I do not know what kind of permission is required. There is limited support to aid in applying and a large cost to get the information required before even attempting the process. I have ample floor space to accommodate more children lots of interest in people joining as my assistant, however, I can't afford to go through the planning process. It would be helpful if there was more and clearer guidance on this or even better if the process was funded." - Childminder Survey respondent

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6.32   In addition to the cost, time and complexity of applying for planning permission, a key challenge noted by stakeholders is the lack of consistency between local authorities in how planning rules are applied. This, according to stakeholders interviewed can create confusion and uncertainty for childminders which in some cases can lead childminders to assume they need planning permission when they do not. This can hold back some childminders from extending their provision even when they have the desire and capacity to do so.

6.33   Stakeholders interviewed were also of the view that there was often a lack of communication between planning departments and the childcare teams within local

authorities which in turn has led to inconsistent messages relating to planning being relayed to childminders. This lack of information and communication is further supported by our research which could not find any easily available information or guidance on any of the Welsh planning authorities' websites reviewed, that was directly related to childminders.

6.34   These issues around planning confusion and inconsistency have been raised by PACEY, who have also collected examples of how local authority planning restrictions are impacting on registered childminders in Wales.

'PACEY Cymru are aware of a growing, concerning picture where some local planning departments are taking the view that planning permission is required and requesting high fees to process this in some areas'.[15]

6.35   These examples of challenges with the planning system experienced by childminders highlight the need and importance of providing clear and consistent guidance to childminders on planning requirements across all planning authorities.

Training and career progression

6.36   In most cases, childminders are expected to undertake self-funded mandatory training, including paediatric first aid training; food safety and hygiene; and safeguarding. Some childminders consulted noted that they found this training to be expensive and would appreciate more funding towards it, especially since they are required to re-fresh this training every few years.

6.37   Other non-statutory training is available to childminders. Childminders interviewed provided examples of these types of training courses that they either had undertaken or were aware of, including training relating to the new ALN Act; speech and language; and manual handling training. Childminders tended to appreciate the amount of training on offer, particularly those training courses that were either free or a reasonable price. It was acknowledged that 'PACEY is good at providing free training', and offer a number of webinars on various topics, and that local authorities' Family Information Services (FIS) sometimes offer a discount price for some training courses.

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[15] Planning issues in Wales | PACEY and 'Impact of Local Authority Planning restrictions' report to Welsh Government (September 2021,unpublished)

6.38 Survey responses suggest that accessibility of training can be an issue for some childminders, with four per cent (seven out of 188) of childminders selecting this as a considerable challenge allocating it a challenge rating score of five out of five and a further 17 per cent (32 out of 188) allocating it a challenge rating of four out of five. Furthermore, 50 per cent (94 out of 188) of respondents said that accessing training has become more challenging over the past three years, compared with 16 per cent (30 out of 188) who noted that it has become easier. A further 30 per cent (57 out of 188) selected the option 'no change' and the remaining four per cent (seven out of 188) selected 'not applicable' – see Figure 6.1.

Figure 6.1: – The extent to which childminders consider access to training to be a challenge and whether this challenge has increased or decreased during the last three years.
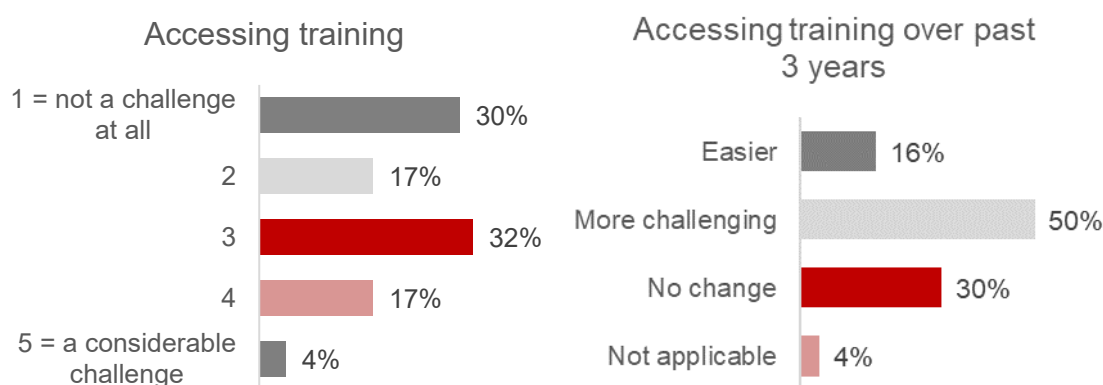
Source: Childminder survey 2022 (n=188)

6.39 Additional comments within the survey and during follow-up interviews suggest childminders struggle to undertake training during the day and thus would like some training to take place on evenings and/or at weekends. Some of the childminders interviewed however, noted that in their area, the local authority offered training sessions for childminders that were often free of charge and delivered either face to face or online during evenings and weekends. The extent to which training of this nature is available, however, appears to vary across local authority areas.

6.40 However, it was also acknowledged by some childminders that it can be difficult to undertake training even during evenings and weekends due to personal commitments outside of working hours, such as own family life.

'There is a lot of good training available but not always at the right time of day. Childminders require evenings or weekend training which isn't always available.' Childminder survey respondent.

'Since COVID there is more online training available but working 50 hours a week and being a mum of three, it's almost impossible to fit it all in.' - Childminder survey respondent.

'When attending any training, this is done during my free time, which at times, can mean I miss my weekend due to training requirements.' - Childminder survey respondent.

6.41 Several survey respondents felt that training has become easier to access over the past couple of years and since the pandemic due to online delivery. This has meant childminders can fit training around their evenings and weekends more easily and eliminates travelling time and expense. However, a few childminders interviewed reflected on how they preferred some face-to-face training, particularly because it offers them the opportunity to meet and interact with other training attendees.

'The introduction of zoom/online training has been fantastic as I am able to access so much more training as I don't have to factor in travel times, and I can fit the training in around my own family childcare. I have tripled my access to training over the past 12 months.' - Childminder survey respondent

6.42 Despite the training available, comments from childminders suggest that take-up of training varies between childminders. Some survey respondents didn't see the relevance in taking up non statutory training as, in their view it didn't necessarily lead to any career progression.

'Training and career progression doesn't really apply to childminders as they either continue to operate as they have always done or move to another job'. - Childminder survey respondent

6.43 Almost a third of survey respondents (30% - 56 out of 187) noted that career progression, and any challenges associated with it, was not applicable to them – see figure 6.2. This suggests that many childminders may not necessarily feel that there is career progression in their role and may not recognise that the way they grow their business and take part in continuous professional development (CPD) is an advancement of their career progression.

Over a quarter of the survey respondents (26 per cent - 49 out of 187) consider career progression opportunities within childminding to be a considerable or large challenge, allocating it a challenge rating score of four or five out five. Although almost half (44 per cent 83 out of 187) did not consider career progression

opportunities within childminding to be a challenge, possibly the most interesting finding is that almost a third (30 per cent 56 out of 187) did not consider career progression to be applicable to them. This is linked to some of the findings reported earlier outlining that some survey respondents did not see the relevance of taking up non statutory training as it did not lead to any career progression (see section 6.42). Other respondents offered similar statements:

'Career progression doesn't really apply to childminders if you plan on staying just as a childminder' - Childminder survey respondent.

Figure 6.2: The extent to which childminders consider career progression opportunities to be a challenge and whether this challenge has increased or decreased during the last three years.
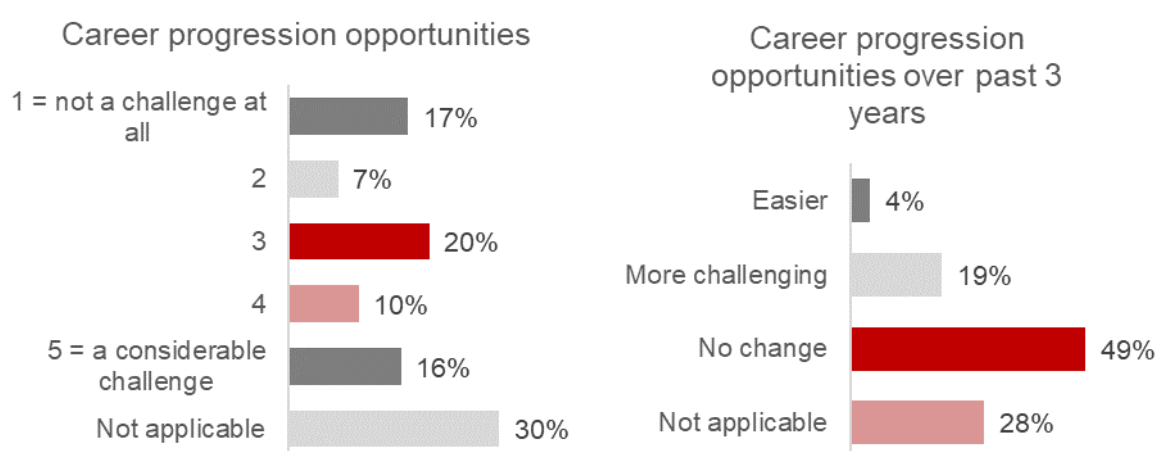
Source: Childminder survey 2022 (n=187)

6.44   The perception that career progression is challenging or not applicable to childminding, was also reflected in the views expressed by some childminders interviewed who noted that a lack of career progression opportunities may deter some individuals from considering childminding as a career option. One childminder surveyed was of the view that marketing aimed at attracting potential childminders should highlight the professionalism and career progression opportunities associated with the profession.

'Professionalism and career progression should be encouraged. Recruitment of new childminders is marketed incorrectly in my view i.e. as a stop gap, when you have a young family. Therefore, minders won't invest in themselves or in the setting as they will be quickly moving on to something else.' - Childminder survey respondent

6.45   As a related note, some local authority members felt that many career opportunities open up in other areas of the childcare industry for those who have worked as a childminder. These include working for PACEY or within other childcare environments. These career progression opportunities should, in their view, also be promoted to potential childminders as a way of encouraging them into the industry.

Administration and paperwork

6.46   As part of their role, childminders have a number of administrative responsibilities, including keeping up with policies, procedures and ensuring the correct paperwork is in place for their setting and for parents using their setting. Childminders must have documents in place for their settings to comply with legislative requirements and with the Welsh Government's National Minimum Standards. Some of these include a record of accidents, serious illness and other significant events occurring on the premises; arrangements for dealing with complaints and concerns; attendance records; and a Statement of Purpose which includes:

- aims and objectives;

- details of services offered, facilities and routines;

- admissions policy; and

- terms and conditions.

6.47   Childminders should also be undertaking observations as part of the new curriculum and evidencing activities they do with the children.

6.48   When a new child starts attending a childminding setting, the childminder must also provide the family with a 'parent pack'. This can contain parent contracts, fees, policies, letters about information sharing, welcome booklets, and safeguarding / child protection and complaints policies and procedures. Guidance is provided to childminders in Wales as to what policies and procedures are needed for their setting, and some policies and procedures are mandatory (such as ones relating to safeguarding and health and safety). There are also a number of other policies and procedures which can vary by setting – for example policies relating to trampoline use, animals and pets, outings, outdoor play. Childminders must also stay on top of the latest policies and procedures that they need, and ensure they are kept up to date.

6.49   Survey responses suggest that the 'level of paperwork and administration' can be a considerable challenge for childminders, with almost half (48 percent – 90 out of 187) selecting this as a challenge rating of five out of five, and a further 22 percent (40 out of 187) allocating it a challenge rating score of four out of five Furthermore, three quarters (75 per cent – 142 out of 187) said that the 'level of paperwork and administration' has become more challenging over the past three years. Only one respondent said it had become easier, and 22 per cent (41 out of 187) said there had been no change – see figure 6.3.

6.50   These findings mirror those highlighted in the literature reviewed and views expressed by wider stakeholders which indicate that paperwork and administration tasks are considered one of biggest challenges faced by childminders. PACEY, CIW and local authority representatives also acknowledged that although the level of paperwork can deter some individuals from entering the profession and encourage others to leave, most of the paperwork is important and necessary. CIW recognised that the additional paperwork required for the new curriculum was also creating some concerns among childminders. However, they also noted that the move to more online form filling should help reduce the impact of paperwork, while also helping the professionalisation of the sector. Although it was also acknowledged that more online form filling is likely to be challenging for those who are not digitally literate.

Figure 6.3: –The extent to which childminders consider the level of paperwork required to be a challenge and whether this challenge has increased or decreased during the last three years.
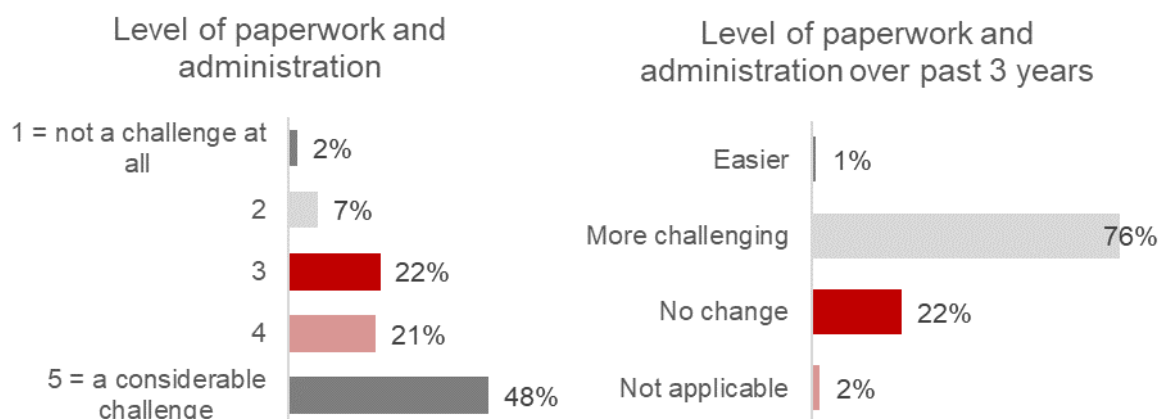
Source: Childminder survey 2022 (n=187)

6.51   Several survey respondents expanded on how paperwork and administration can be a challenge, as follows.

> 'My biggest issue is that of increasing regulation and frequent changes to the NMS or other legislation which is sometimes poorly communicated. The amount of administration and paperwork is simply taking any enjoyment out of the job' - Childcare survey respondent.

> 'A lot of new initiatives or changes to requirements /legislation need to be updated ASAP which takes away from the job or requires you to work longer than possibly you would like to.' Childcare survey respondent

6.52   Childminders who were interviewed had mixed views on administration and paperwork. Most childminders acknowledged that paperwork can be burdensome and can impact their personal time. However, many childminders also recognised that the paperwork required was important and that it was necessary to have the correct systems in place to ensure the continued professionalisation of the role and recognition of childminding as a business. Several childminders interviewed felt that the level of paperwork was manageable. This was particularly felt by those who had a day off, or a few hours off during the week to get most paperwork done during this time so it did not take up their free time as much in evenings and on weekends.

6.53   Some childminders felt that although some paperwork is manageable, a large challenge can be keeping on top of the policies and procedures documents that they need to produce and provide to parents. One childminder said they currently have 24 policies, all of which must be regularly updated and added to as new ones

come into place. While they recognise the importance of having some of these in place, in their view it felt excessive and unmanageable. Some also commented that it felt pointless as they knew that parents did not read all the information they are provided with.

> 'You know that these rules are there because something has happened in the past, but it is a blanket rule and there just needs to be more common sense rather than sticking to rules'. - Childminder interview

6.54　While it was acknowledged that PACEY Cymru give good guidance around policies and procedures – including information and webinars, childminders felt it would be helpful if they could access templates for specific policies. In England, templates are provided by PACEY, however in Wales guidance has generally been that services should develop policies based on their own individual circumstances. However, given childminders' reporting of administrative burden, this preference could be reviewed by the Welsh Government and Care Inspectorate Wales, in collaboration with PACEY Cymru.

6.55　Some childminders also felt that the amount of evidence they are required to collect for CIW as a condition of registration can be challenging. For example, one childminder spoke of the challenge of evidencing that the children are having fun in their settings, this can be difficult when it comes to babies. They are often expected to take photographs as evidence; however, this again can be difficult to capture moments as they happen when childminders are busy caring for the children and getting involved in the activities etc. Some also felt that the new curriculum might be a challenge as more paperwork and observations are required. Several childminders also reported that they had not yet received clear guidance about the new curriculum and what they need to do in their setting to reflect it.

> 'I think this is wrong. Parents just want somebody to look after their child while they're in work. I don't see why I have to implement or be an educational setting. I'm a home setting, so we should just be about daily learning, just basic learning, not this new curriculum for Wales. It's just too much.' Childminder interview

6.56　There was a feeling by many childminders that much of the paperwork is excessive for childminders when compared to a nursery who have more staff to be able to dedicate their time during working hours. The general consensus among childminders was that even where there was acknowledgement of the importance of the paperwork they must have in place, the concern lies in having the time to do the

paperwork without taking time and attention away from the children they care for – which they see as the priority of their role. Some childminders reported that the physical and mental demands of the job during the day means they are often too tired to do paperwork during the evenings. This is also difficult for those who have families with concerns that the paperwork eats into family time. One childminder noted that she is having to close her setting one day a week so that she can fit in time to complete all of her paperwork.

> 'It's a physical job and so I struggle to do paperwork in the evening because I am so tired after working in the day.' Childminder interview

> 'You are the accountant, the cleaner, you are everything and you are expected to be tracking the children. It is all things you do naturally, but you need to be able to prove and document that this is what you are doing.' Childminder interview

6.57   In addition to templates for policies and procedures, most childminders felt that it would be useful to have clearer guidance about what general paperwork is needed, more templates and better communication about when things get updated. There was also a call for paperwork to be streamlined, with only the necessary paperwork being a requirement, and less subjective to what individual CIW inspectors will pick on during inspections (this is discussed in more detail in the next chapter). It was felt that this would make a difference to the administrative pressures on childminders.

> 'It would be helpful if CIW gave a bit of guidance on paperwork. If we don't have something in place that we have not been told about they grade us down and say we should know this – well, how are we supposed to know about it if they haven't informed us of the change?!'. - Childminder interview

> 'Paperwork is a bit wishy washy. Nothing says exactly what you need to do. Some childminders do a lot more than others. All my paperwork is on the laptop but there is no guidance about whether things need to be printed or if it can be shown on the laptop. I'm lucky that I have no children on a Monday so use this day to get paperwork done. It usually takes around four hours. Most childminders are unable to do this during the week so do it on their weekends and free time. This means a lot of work is unpaid.' - Childminder interview
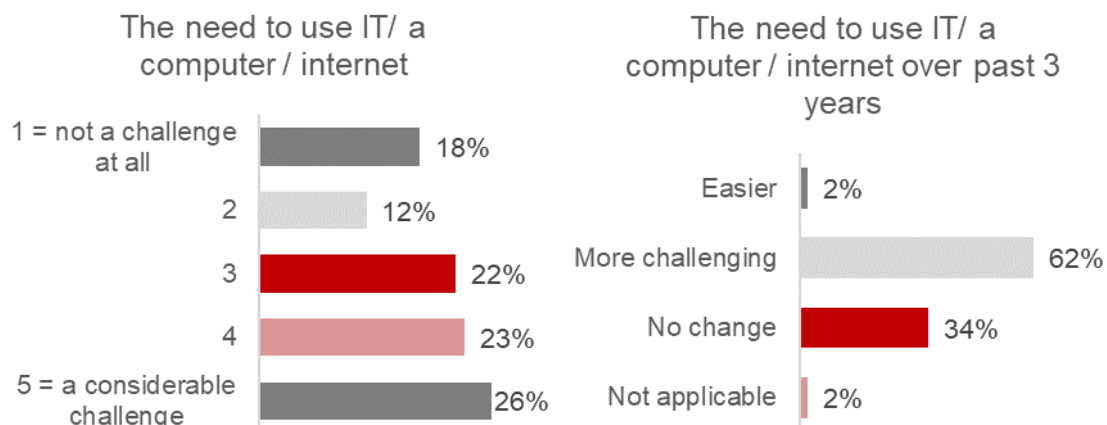
6.58   With regard to the fact that the administrative tasks feel like unpaid work, some suggestion was made around increasing parental fees to cover this work. However, there was a general consensus that it would be difficult to put this added cost onto

parents who are often already struggling financially, and childminders interviewed felt that they would not be able to do this to families who use their setting.

6.59   The issue of paperwork can be further evidenced from the CIW inspection reports reviewed in which the majority of areas of non-compliance and recommendations for improvement relate to paperwork and procedures that childminders needed to adopt or produce. Most inspection reports recorded issues such as needing to update DBS checks and certain policies not being in place (for example use of trampoline policy, hand drying procedure). Many inspection reports also referred to records such as daily diaries, fire drill procedures, statements of purpose and risk assessments, not being produced or kept up to date. This demonstrates the challenge childminders can face in keeping all paperwork and procedures up-to-date and shows that further support should be given in helping childminders to do this so that they can be compliant with regulations.

6.60   Most childminders interviewed felt competent in the digital aspect of completing paperwork, however acknowledged that it can be difficult for many childminders who are not used to IT and completing things online. There was a perception that this can be especially difficult for some older childminders. One childminder felt that "if you are not digitally competent then you cannot do the job of a childminder anymore". Feedback from stakeholder interviews also reflect this feeling. For example, CIW commented that although the shift to online should help to create a more streamlined administrative process, there will be a cohort of people who struggle with digital literacy. In the local authority discussion groups, several examples were provided of childminders who had left the profession because they could not keep up with the digital demand of the job.

6.61   Survey responses suggests that 'the need to use IT/a computer/internet' can be a challenge to around half of childminders surveyed, with 26 per cent (43 out of 187) offering this a challenge rating of five out of five, and a further 23 percent (41 out of 187) offering a challenge rating of four out of five. Furthermore, almost two thirds (62 per cent – 114 out of 184) said that the 'need to use IT/a computer/ internet' has become more challenging over the past three years. Only three respondents said it

had become easier, and 34 per cent (63 out of 184) said there had been no change – see figure 6.4[16].

Figure 6.4: – The extent to which childminders consider the need to use IT to be a challenge and whether this challenge has increased or decreased during the last three years.

The need to use IT/ a computer / internet

1 = not a challenge at all	18%
2	12%
3	22%
4	23%
5 = a considerable challenge	26%

The need to use IT/ a computer / internet over past 3 years

Easier	2%
More challenging	62%
No change	34%
Not applicable	2%

Source: Childminder survey 2022 (n=187)

6.62   A small number of survey respondents also offered additional comments regarding how difficult it can be for them to complete administrative tasks on computers etc. and that they would appreciate more support with this. Some survey respondents mentioned that they need the help of their family members to complete paperwork online, and that they would struggle to complete it without their support.

> 'I would love to become all digital but don't know where to start.' Childminder survey respondent

> 'I am not good with any form of technology; I don't even know how to send an e-mail so my daughter has to help me a lot' Childminder survey respondent

6.63   Several suggestions were made during interviews with childminders and other stakeholders that given the administration challenges faced by childminders that there should be courses and support made available to improve their digital literacy.

6.64   As well as challenges with computer literacy some childminders also referred to challenges gaining access to sufficient internet connection.

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[16] It should be noted that the survey was only available online which may have excluded some childminders who find using IT or gaining access to the internet challenging, from responding – see also the methodology outlined in section 2. The findings presented above may therefore understate the number of childminders who consider the need to use IT to be a challenge.

'We have very poor internet access here we have changed suppliers on a regular basis but it's still very slow'. Childminder survey respondent

CIW inspections and communication from CIW

6.65   Childminders expressed mixed views in relation to inspections. some felt that the inspections they had received were fair and not as intimidating as they were expecting. Some also felt that the period of time between inspections was about right, and not too burdensome. Others however, noted that they felt intimidated by CIW inspectors, or knew of other childminders who felt like this. One childminder noted that they knew some other childminders who have given up the profession before their inspection was due as they felt so intimidated by it.

6.66   It was suggested by some stakeholders, that one way of helping to ease the intimidation experienced by some childminders when being inspected would be to have more regular visits by CIW in between official inspections. This, it was suggested could be halfway between inspection periods, and an inspector could come to the home informally and give advice and information on the inspection process and what is expected. There was also a call for more information generally to be given to childminders about the inspection process.

6.67   There was also a feeling among some childminders that due to the intimate nature of childminding, it can sometimes feel like an attack on them personally when an inspector highlights things in their house that are below expected standards, or aspects of their home setting that could be improved.

'It [CIW inspection] can feel a lot more personal than if it was in an external setting, and it needs to be recognised that as well as being a childcare setting, it is also our home'. - Childminder interviewed.

6.68   One childminder noted that they knew of another childminder who felt so personally attacked by the comments an inspector had made following a visit, that they cancelled their service three weeks after their inspection. Another childminder noted that they felt unsupported by CIW and saw their role as 'picking faults' rather than 'praising good practise'.

'There is so much pressure. I am constantly thinking that what I am doing is not good enough because it does not reach these unbelievable expectations. CIW feel like this big scary entity that is going to come in and tell me that I am rubbish.

It is such a personal thing when it is your home and people come in and say you are not doing this and that right, you feel judged. I think they [CIW] want to be seen as supportive, but it actually feels scary.' - Childminder interviewed.

'They [CIW] don't realise that this is a home as well as where I do my child minding. It can be quite demoralising to have an inspector walk around the house picking faults such as not enough visual things on the wall in the hallway etc.'- Childminder interviewed,

6.69   The main issue reported with regard to CIW inspections was the lack of consistency. This point was made by both childminders themselves and some local authority childcare leads. Childminders spoke of feeling uncertain of 'what they would get pulled up on' during inspections. One childminder referred to an example where they had been reprimanded for not directly reporting to the CIW an incident that required them to take a child in their care to A&E. However, another childminder they knew had a very similar incident and dealt with in the same way, but this was not brought up as an issue at all during their inspection. Childminders therefore felt that there was a high level of subjectivity associated with the inspection process.

6.70   A lack of consistency in issues reported was also observed in the CIW inspection reports reviewed as part of this research. While there was a general consistency in terms of comments relating to paperwork needed by childminders, some inspectors picked up on issues that others did not. For example, issues such as whether or not coat pegs were at the right height for the children to put their coats on themselves, whether or not keys were kept on the wall, the need to develop links with other settings, were picked up in some reports but not others. A number of these recommendations or observations appear to be subjective to the inspector and may contribute to the feelings expressed among childminders of an inconsistent approach and a feeling of 'it depends on who you get' for their inspections.

6.71   There was a call among childminders to have greater consistency when it comes to inspections, this was also in relation to the policies and paperwork they need in place (see previous chapter). It was felt by some that if more information relating to how inspectors assess childminder settings could be shared with childminders in advance of an inspection that this would help with the pressure childminders feel around inspections and ensure more consistency. There was also one suggestion that a childminder should receive the same inspector each time (where possible).

This consistency would help childminders build a relationship with their inspector and enable them to have a specific person to get in touch with if they have any queries (pre or post inspection).

6.72   A comment made during local authority discussions was that childminders should receive more follow up support after each inspection. For example, it was suggested that when inspectors identified areas of non-compliance or poor rating, these childminders should receive help and guidance as to how to address these shortcomings.

6.73   Some childminders felt that they had not received much support from CIW, or that CIW did not work in the interests of childminders. However, there were others who reported a good relationship with CIW or an improvement in their communication with the Care Inspectorate Wales (CIW) in recent years.

> 'Always found CIW helpful, they are only ever a phone call away'. Childminder interview

Awareness of Childminding

6.74   There was a strong feeling among stakeholders and childminders that the childminding role is underappreciated, undervalued, and is not given the recognition as the professional role that it is. There was a concern that there is a lack of awareness of the professionalism of the role, with many saying that they still feel there is a perception of childminders as being 'glorified babysitters'. Stakeholders and childminders both felt that even parents who use childminders don't always have a full understanding of the qualifications, training and administrative duties that childminders are required to undertake in order to provide care for their children. Many of the stakeholders interviewed were also of the view that childminders are not always recognised by others as being a business and that some childminders do not recognise themselves as a business. These stakeholders noted that this contributes to them being undervalued by some parents and wider stakeholders.

6.75   Childminders provided several examples of how they have felt underappreciated. Some childminders interviewed noted that they felt like 'the poor relatives of childcare'. They noted that is a common misconception that childminders just look after the children – 'possibly sticking them in front of the telly' - whereas other childcare setting are considered to focus more on child development and

educational activities. Some childminders felt that local authorities and health visitors did not promote childminders to parents to the same extent as they did other childcare settings in their area. One childminder referred to an example of a local health visitor who encouraged parents to send their children to a Cylch nursery rather than a childminder, and informed parents that children gained better educational development at a Cylch setting than they did at a childminding setting.

> 'I feel like we are not promoted much as a specialist service. Sometimes we are seen as a glorified babysitter, some people don't understand what we do and the benefits their children can gain from a more focused childcare environment, where we get to really know the children and their needs. This is frustrating – the word is not spread enough about childminders and our role.' Childminder interview.

> 'We [childminders] are becoming more known as professionals, for example, by GP's and midwives. However, I still feel that childminders aren't recognised enough, and it makes me feel like I'm not doing a proper job.' - Childminder interview

6.76   Local authorities and childminders recognised that childminders felt particularly underappreciated through the pandemic. Many childminders stayed open during the pandemic to care for the children of key workers, however they did not feel recognised as key workers themselves. Stakeholders noted that childminders did not receive the acknowledgement that nursery workers and teachers received – even though they were letting children into their homes and in so doing, were putting their own health, and the health of their families at risk. One childminder gave the example of her own children not being allowed to go into the local school hub kept open for children of key workers, because her role as a childminder was not recognised as a key worker. This meant she couldn't look after as many children as usual during this period, as her own children were at home and had to be included in the number of children she was allowed to care for.

6.77   Stakeholders noted that there can also be a lack of awareness of the childminding role amongst those who are considering becoming a childminder. During discussions with local authorities there was a consensus that, in order to attract more people into the industry, childminding should be promoted as a profession and a career path and that negative misconceptions relating to the role need to be

addressed. There should be more awareness of childminding as a business and a promotion of this as a valued career choice.

> 'I wish people could understand what childminding really is and how wonderful it is. It is as good as any other childcare but it is also different to it. The huge benefits to using childminder are not always recognised and we need to really promote this. If parents really understood what childminders do, they would be knocking on their doors. They really need to be treated equally in the sector, but I don't feel that they are treated as fairly'. Local authority childcare lead

> 'Maybe the earning potential of childminding should be promoted - it might give childminders a better, more proportionate idea of the level of quality/training/CPD they are likely to be required to undertake. Also, emphasising childminding as a business first and foremost – outlining that they are sole trader entrepreneurs could encourage more individuals to set up as a childminder.' Local authority childcare lead

6.78   A couple of local authority representatives noted that they are promoting childminding to parents and families through webinars and social media sessions. They are also using these platforms to promote childminding to try and encourage more individuals into the industry. PACEY have also done a lot of work to promote childminding and operate in the interest of raising awareness of childminding and their importance in the play in the childcare sector. However, some stakeholders were of the view that more needs to be done to promote childminding, possibly through a national campaign promoting childminding both as a valuable form of childcare as well as a rewarding career path.

Financial issues and business sustainability

6.79   Childminders' survey responses suggest that the cost and expense of running their business is a challenge for the majority of childminders. Over a quarter (26 per cent - 48 out of 188) scored the costs and expense of running their business as a challenge rating of five out of five, and a further 32 per cent (60 out of 188) allocated it a challenge rating score of four out of five – see Figure 6.5. Furthermore, 86 per cent (160 out of 187) said the cost and expense of running their childminding business has become more challenging over the past three years. Only one respondent said it had become easier, and 12 per cent (22 out of 187) said there had been no change.

Figure 6.5: – The extent to which childminders consider the costs and expense of running their business to be a challenge and whether this challenge has increased or decreased during the last three years.

Costs and expenses of running my childminding business

1 = not a challenge at all	6%
2	6%
3	30%
4	32%
5 = a considerable challenge	26%
Not applicable	1%

Costs and expenses of running my childminding business over past 3 years

Easier	1%
More challenging	86%
No change	12%
Not applicable	2%
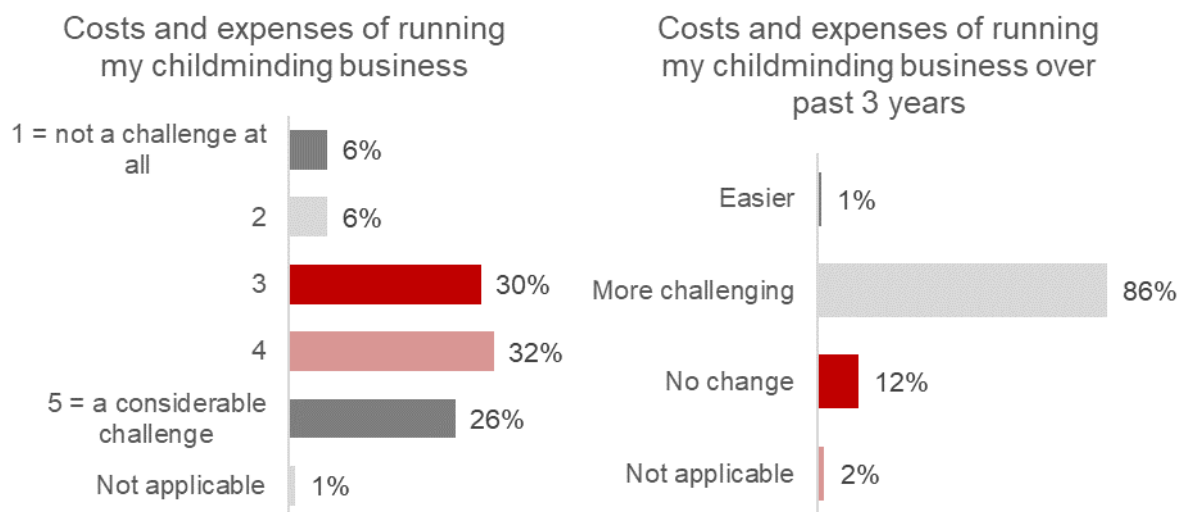
Source: Childminder survey 2022 (n=188)

6.80   Childminders surveyed and interviewed attributed the current cost of living crisis to these increasing cost challenges; most also feared that these costs will become more challenging in the near future.

> 'I feel that running costs are going to be a major concern for the childminding sector going forward. The rising cost of literally everything - food, gas/electricity, membership costs, costs of arts and crafts materials, resources etc - is going to have a significant impact on whether it [running a childminding business] continues to be financially viable' – Childcare survey response.

6.81   The above quote illustrates that the financial challenges faced by childminders are not confined to increases in business overheads, but also include the sharp cost increases associated with other items they require, including craft and play resources for the children.
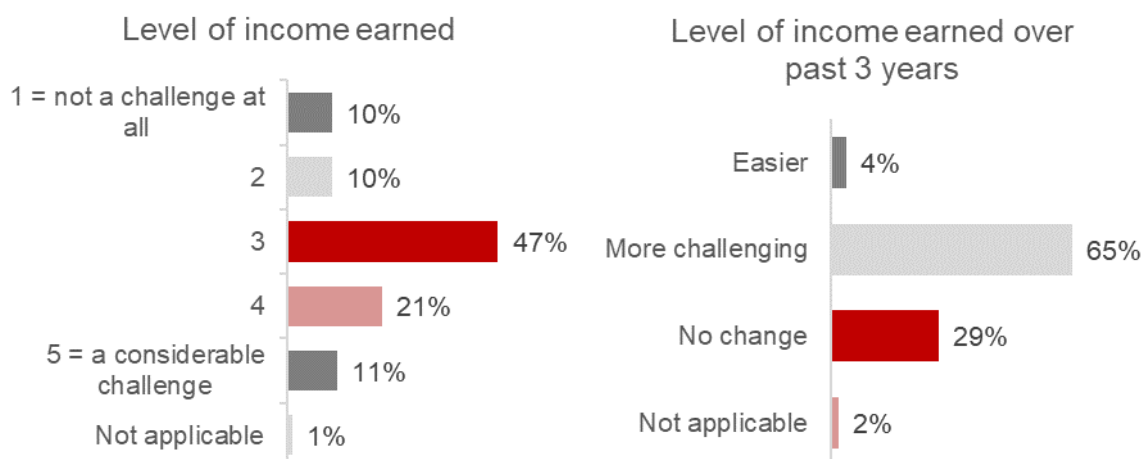
6.82   A review of CIW inspection reports supports this point as a significant proportion (around a third) of the inspection reports reviewed reported issues with insufficient resources. These reports outlined the need for more play resources, lack of outdoor space or insufficient use of outdoor space, lack of space to store resources, the need for more toys to promote diversity, a need to label toys, more soft furnishings needed, and more natural and sensory resources needed. This suggests that some childminders may struggle to keep up with the demand to provide a range of

resources in their setting and more help may be needed to support childminders to improve their setting, for example funding to improve outdoor spaces.

6.83   For some childminders interviewed, the ever-increasing challenges of the rising cost of living was making it more and more difficult to cover the costs of running their business whilst earning an income. This has resulted in some childminders considering closing their business as they feel it has become less financially viable to continue with it. This is echoed by the findings of a PACEY Cymru report which identified a lack of financial security to be a key reason for childminder cancelled registrations in Wales (PACEY Cymru)[17].

6.84   Whilst childminders are faced with the ever-increasing costs and expenses of running their business, many of those surveyed and interviewed as part of our review felt unable to increase the childcare rate that they charge parents because, as one survey respondent stated, 'parents can't afford it'. The childminder survey findings suggest that most childminders consider the level of income earned to be a challenge – see Figure 6.6. More than one in 10 (11 per cent - 20 out of 187) rated the challenge of earning an income as five out of five, and a further 21 per cent (40 out of 187) allocated this challenge a rating score of four out of five. Furthermore, 65 per cent (121 out of 187) said the level of income earned through their childminding business had become more challenging over the past three years. Only four per cent (eight out of 187) said it had become easier, and 29 per cent (54 out of 187) said there had been no change.

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[17] PACEYCymru [August 2021] De-registration of childminders in Wales report. Unpublished.

Figure 6.6: – The extent to which childminders consider the level of income earned to be a challenge and whether this challenge has increased or decreased during the last three years.

Level of income earned

1 = not a challenge at all	10%
2	10%
3	47%
4	21%
5 = a considerable challenge	11%
Not applicable	1%

Level of income earned over past 3 years

Easier	4%
More challenging	65%
No change	29%
Not applicable	2%

Source: Childminder survey 2022 (n=187)

6.85   One childminder interviewed also explained how having such a close and personal relationship with families can sometimes be to the detriment of the finances of the business. For example, during the school holidays she cares for three siblings and feels so guilty about charging the full fee for all three children that she offers the family a discount.

6.86   As well as being reluctant to charge some parents the full amount for their service, several childminders interviewed noted that they had experienced issues with receiving payment from parents. One childminder had cancelled their service due to this issue. They had issues with one family who used their service and did not pay them, it took them months to get any money back through their insurer and they never received the full amount they were owed. These childminders felt that there should be some financial support mechanisms in place to protect them when this happens. Another childminder felt that some parents had a lack of respect for them as a business that relies on their payment for income, and instead treated them as if they did not need the money.

Impact of the COVID pandemic

6.87   The COVID-19 pandemic has had implications for the financial stability of many childminding businesses. A report by PACEY (March 2021) which explored the challenges childminders were facing in relation to COVID-19, found that 38 per cent of the 746 PACEY members who responded to the research, were unsure or not

confident about the financial viability of their business over the next 12 months.[18] Consequently, some childminders were considering retiring early or moving to another job. It also found that a reliance on other household income, such as that of their partner's, was a factor in enabling childminders to continue childminding.

6.88   Some childminders surveyed and interviewed as part of this review, acknowledged the financial support they received during the COVID-19 pandemic. For example, one survey respondent stated: 'I've had financial support - my local FIS were brilliant in supporting me with COVID closure costs.' Some childminders interviewed explained how they were able to offer Coronavirus Childcare Assistance Scheme (C-CAS) funded places to children whose parents were key workers, which enabled them to stay open and earn an income during the pandemic. However, other childminders interviewed had to close for some, if not all, of the time during the pandemic, either because they did not have any key worker parents to offer C-CAS, or they had to temporarily close when they had a COVID-19 case at their setting. Some of these childminders felt there was a lack of financial support during this time.

6.89   Some childminders interviewed reflected on lasting negative impacts of COVID-19 on the financial viability of their business. A few childminders commented on the reduced demand for childcare as a result of the introduction of more flexible working arrangements following COVID-19, enabling more parents to work from home. In some cases, these flexible working arrangements enable parents to look after their children whilst working, and therefore not require childcare. This has had an impact on the demand for wraparound childcare in particular because, as one childminder explained, 'parents working from home are able to pop out and do the school run' and therefore not require wraparound childcare.

   'It was always very busy and I had a waiting list before the pandemic, but demand for childcare places has fallen since the pandemic.' Childminder survey respondent

6.90   A related note on difficulties since the pandemic was that there were some reports that the behaviour of some children has been impacted by the pandemic. For example, some childminders noted by that some children have struggled with their social skills or have had attachment issues with their families since the pandemic.

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[18] PACEY Cymru [March 2021] Findings of recovery calls in Wales/ Canfyddiadau galwadau adfer yng Nghymru | PACEY

This has been a challenge for some childminders who have found children in their setting more difficult to settle.

Hours worked.

6.91   Some childminding survey respondents, noted that they worked longer hours each day, in order to earn enough income without having to increase the rates they charge parents.

'To be able to get a reasonable wage I work 50 hours per week, that doesn't include paperwork or cleaning etc.' Childminder survey respondent.

'A decent income is only earned in relation to the hours worked which can be 80 + a week. Parents fees and other funding only matches minimum wage when resources and overheads are taken into account. Sometimes not even minimum wage - for example when working weekends or out of hours' Childminder survey respondent.

6.92   The survey findings suggest the extent to which hours worked each day/week is a challenge for most with 20 per cent (37 out of 186) of respondents selecting this as a challenge rating of five out of five and a further 26 per cent (49 out of 186) scoring this a challenge rating of four out of five. Furthermore, 49 per cent (92 out of 186) noted that they felt that working hours had become more challenging over the past three years – see figure 6.7.

Figure 6.7: – The extent to which childminders consider the hours worked each day to be a challenge and whether this challenge has increased or decreased during the last three years.
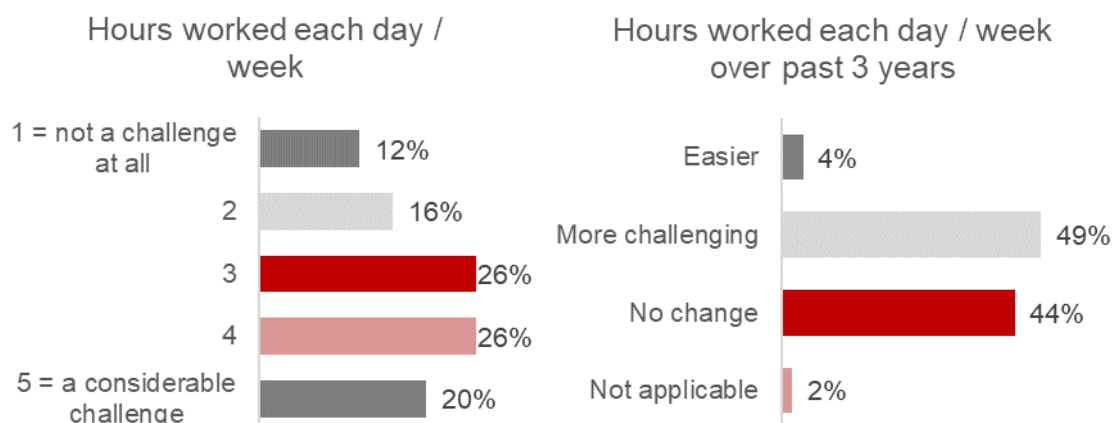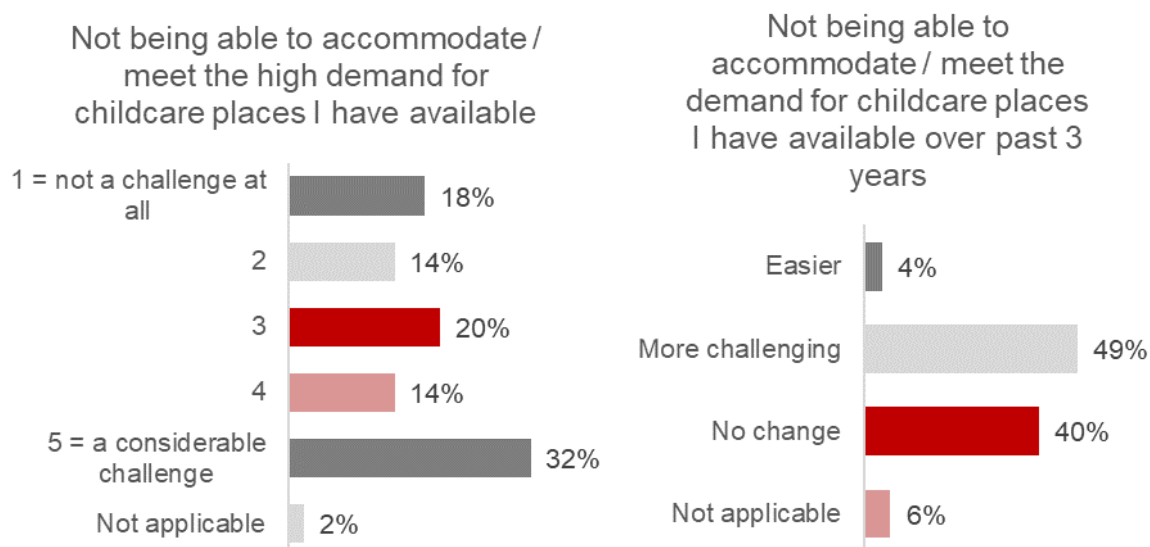

Source: childminder survey 2022 (n= 186)

Meeting the demand for childcare

6.93   Childminders surveyed were asked whether a low demand for childcare places within their setting was a challenge and / or whether their ability to accommodate a high demand for childcare places was a challenge for them. Responses gathered suggest that not being able to accommodate high demand for childcare places was more of a challenge for childminders than dealing with low demand. Almost a third (32 per cent 60 out of 188) of respondents rated not being able to accommodate high demand as a five out of five challenge, and a further 14 per cent (26 out of 188) scored this a challenge rating of four out of five. Furthermore, 49 per cent (92 out of 186) said that accommodating demand has become more challenging over the past three years. On the other hand, only five per cent (10 out of 188) rated low demand as a five out of five challenge, with most (63 per cent – 118 out of 188) rating this as not being a challenge at all.

6.94   The survey findings also outline geographical variations in these results. For example, 40 percent (21 out of 53) of respondents from north Wales rated the challenge of high demand for places as a five out of five compared to 17 per cent (eight out of 48) of respondents from southeast Wales. This is likely to reflect general differences in the demand for and supply of childcare across all settings within these areas – i.e. that the availability of childcare in relation to meet demand is likely to be higher in southeast Wales across all settings compared to areas of north Wales.

Figure 6.8: – The extent to which childminders consider their ability to meet demand for childcare places to be a challenge and whether this challenge has increased or decreased during the last three years.
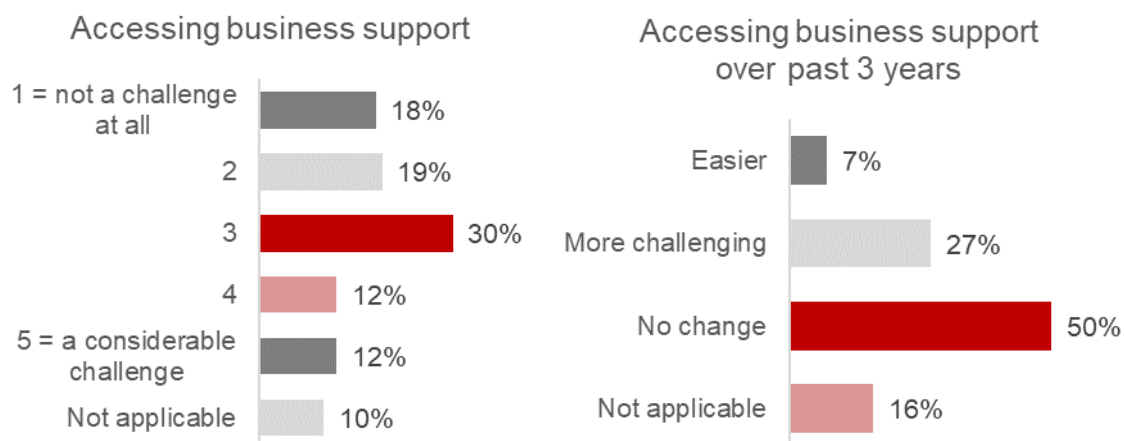

Source: childminder survey 2022 (n= 188)

6.95   Comments provided by survey respondents suggest varied experiences of demand and capacity, with some stating that they cannot fill their spaces, and others being busy and unable to keep up with the demand. Some respondents noted that they had more demand than they could accommodate during after-school times even though they were relatively quiet during the day. Others noted that they found accommodating the childcare needs of parents who were not looking for full time spaces a particular challenge. This suggests that challenges faced by some childminders is not only based on accommodating the volume of demand but also the nature of the demand – i.e. meeting demand for flexible childcare hours including provision of childcare outside their usual working hours.

6.96   Another point related to demand for childcare cited by childminders interviewed was that they were often restricted from delivering provision funded through other programmes, such as Flying Start and Early Education. This restriction squeezes many childminders out of some areas of the childcare and early education market. It also generates an increase demand for half day only childcare places (i.e. childcare during parts of the day when the children are not at the early education setting). Accessing early education in one setting and childcare at the childminding setting, also increases demand for wrap around care, including transport to and from settings. These are often demands that childminders find difficult to accommodate. This is discussed further in sections 6.103 to 6.110.

Business Support take-up and business support needs

6.97   Previous chapters have outlined that rising overhead costs and the inability, or unwillingness of many childminders to increase their fees in line with these costs is threatening the financial viability of many childminding businesses. The findings also outline that many childminders find the level of paperwork and / or the need to be digitally and IT capable in order to operate as a business to be increasingly challenging. However, stakeholders interviewed noted that the rate at which childminders seek or take up any business support aimed at helping them deal with some of these challenges, is also low.

6.98   Some stakeholders were of the view the low take up in business support was due to the fact that a number of childminders do not consider themselves to be a business. This is supported by findings presented elsewhere in this report which indicate that a number of individuals take up childminding as an opportunity to accommodate lifestyle choices as opposed to an opportunity to start up a new business (see also sections 3.6, 4.5 and 6.2). Survey findings also indicate that 10 per cent of respondents (19 out of 188) did not consider accessing business support to be something that was applicable to them.

6.99   On the other hand, however, many survey respondents and interviewees did consider themselves as a business and had sought some business support in the past.

        'The utilities grant has been an excellent support. Training and business support has also been readily available throughout'- Childminder survey respondent.

6.100   Others noted that they wanted to access business support but were not able to.

        'I would like more access to business support as we don't seem to have any at the moment' - Childminder survey respondent.

6.101   Surveyed childminders were asked to score out of five, the extent to which they considered access to business support was a challenge to their ability to manage their business or setting (see figure 6.9). Most, 66 per cent (124 out of 188) considered this to be a relatively small challenge – scoring it three out of five or less. However, it is not clear from these findings whether most respondents could access the business support they needed or whether they didn't think they needed to. Stakeholder views noted above referring to the relatively low take up of business

support would suggest the latter. This was also reflected in some of the interviews undertaken with childminders, particularly those who had been operating for several years, who noted that they didn't feel they needed any business support – even though they also referred to several business management challenges that they currently faced.

Figure 6.9: – The extent to which childminders consider accessing business support to be a challenge and whether this challenge has increased or decreased during the last three years.

Source: childminder survey 2022 (n= 188)

6.102   A range of business support services tailored specifically towards the needs of childminders are already available. These include the Business Smart support services available through PACEY which offer tips, blogs and resources to help childminders develop a grow their business. Business Wales also offer childcare start up grants as well as tailored support packages, access to specialist advisers, mentors, and training as well as a financial toolkit specifically designed for the childcare sector.

6.103   The Welsh Government sought to provide support through the Childcare Business Support Grant which included a childminder Start-up Grant of up to £500 for individuals wishing to start a new childminding business. An evaluation of this grant found that the support had a positive impact on those who received it, but that more work was needed to ensure it was accessible to those who were considering entering child minding[19].

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[19] Evaluation of childcare business support grants | GOV.WALES

6.104   Individual local authorities also provide tailored support, particularly for individuals wishing to start up a childminding service and for childminders wishing to advertise their service more widely.

6.105   It would appear therefore that it is a lack of demand as opposed to a lack of availability that is contributing to the relatively low take up of business support amongst childminders. Some stakeholders were of the view that childminders may not be aware of the support available to them or that they don't realise that they are a business that is eligible to access the support. The same stakeholders were of the view that more targeted messaging is required to outline to childminders the services available, possibly using case studies to demonstrate how the support available is relevant to them.

6.106   Many of the childminders interviewed noted that they often turn to other childminders to gain support and guidance regarding their business. Childminders noted that they not only value the information and advice they gain from each other but also welcome the opportunity to share experiences and to socialise with other childminders. This is particularly important for childminders who feel that the profession isolates them from the wider world – see also section 4.7. One childminder noted that they didn't think they would have kept going if they had not found support from each other.

6.107   In recognition of the importance placed by childminders on peer to peer support, some local authorities have established networking events and workshops aimed specifically at local childminders. However, COVID restrictions placed a limit on these activities as well as other opportunities for childminders to network with each other. Opportunities to network have also been limited by the number of childminders that are still operating in some areas. The number of childminders has fallen in recent years and the pandemic nudged many more childminders, particularly older more experienced childminders who may have offered new childminders the most guidance, towards leaving the profession earlier than planned. In addition, some of the local playgroups which were attended by childminders didn't re-open after COVID – or re-opened but limited access to just parents and their children, restricting access to childminders. As a result, some of the childminders interviewed felt that their peer groups and opportunities to meet and share experiences with other childminders had dwindled in recent years leaving them feeling less supported and more isolated.

These findings indicate that childminders do require support but that many of them may be reluctant to access this from traditional business support services. Business support services may therefore need to consider alternative ways of delivering support to childminders – possibly combining tailored support with group or network activities.

Barriers to opportunities to deliver other funded programmes (Flying Start, Early Education)

6.108   Interviews with childminders, representatives of PACEY Cymru and group discussions with local authority representatives outlined several challenges that hinder the ability of childminders to fully participate in government-funded childcare programmes, including Flying Start and early education. This following sections outline some of these participation barriers as well as other indirect challenges that these programmes create for childminders in some areas.

6.109   The Flying Start programme supports families with children under four years old in disadvantaged areas of Wales. The programme provides, amongst other services, part-time funded childcare for two year olds. Flying Start has recently been expanded to approximately 2,500 additional children and families across Wales. To accommodate this expansion, existing Flying Start childcare providers are being supported to expand the reach of their provision. Ongoing support is also available to encourage new providers, including childminders and childcare providers who specialise in Welsh-medium provision, to offer Flying Start childcare places.

6.110   Some childminders noted however, that they are not allowed to deliver Flying Start funded childcare even though they are located in a Flying Start area – this is often dependent on the local authority area where they are located. This has been the case over the years where some local authorities have prioritised childcare settings that they operate themselves for the delivery of Flying Start. Some childminders who would welcome the opportunity to deliver Flying Start funded childcare are therefore excluded from doing so. Stakeholders interviewed were of the view that even in areas where childminders are allowed to deliver Flying Start funded provision, their ability to so is often limited by delivery criteria requirements and the procurement processes involved. It was noted that many childminders do not have

the qualifications required to meet the Flying Start delivery requirements[20] nor the time required to undergo what was described as its 'complex procurement system.'

6.111   It was reported that, in many cases, if childminders in Flying Start areas cannot or are put off delivering Flying Start funded provision, they often lose the custom of parents of two year old children and above to larger settings that do deliver Flying Start provision. This leaves these childminders with a limited slice of the market i.e. children under two, and older children who require childcare before and after school or during school holidays. This, in the view of stakeholders interviewed, is not sufficient to ensure a sustainable and financially viable childminding business.

6.112   Childminders and wider stakeholders also noted that the provision of early education can also crowd some childminders out of areas of the pre-school childcare market. Childminders operating within many of the local authority areas in Wales are restricted from delivering funded early education to three and four year olds. Children in their care who wish to also access early education have to be taken (usually by the childminder) to another setting for a few hours a day in order to do so, and often picked up again later by the same childminder. Not all childminders can do this while also providing the required level of care to other children at their setting.

6.113   Findings from previous Childcare Offer evaluations indicate that parents want continuity of childcare where possible and will therefore often decide to send their child to a day nursery where they know they will be able to access childcare from an early age and early years education from the age of three. This for many parents is preferable to starting their child with a childminder when they are very small, only to move them once they've settled, in order to introduce them to a new setting at the age of three or four. This, in the view of childminders, serves as a further example of how they are squeezed out of the market.

6.114   As well as government funded programmes limiting childminders access to some areas of the childcare and early education market, some childminders referred to examples of public service practitioners actively encouraging some parents away from childminders. During the childminders' discussion group, it was mentioned that

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[20] In March 2023 the Welsh Government reviewed Flying Start delivery requirements in consultation with Social Care Wales and PACEY Cymru. This review concluded that, for the purpose of qualification requirements, childminders should be categorised as Flying Start Workers rather than Flying Start Leaders. This position has now been regularised on the Social Care Wales qualifications framework which can be accessed via this link: Flying Start worker | Social Care Wales

some health visitors were reportedly advising parents not to use childminders, giving the reason that children required a nursery setting to aid their socialisation skills and readiness for school. This in the view of these childminders undermines the vital role they play in providing quality childcare services. It also serves as a further example of the extent to which childminders appear to be undervalued and less respected than other childcare providers.

6.115   In conclusion, childminders in Wales felt that they faced several challenges that hinder their ability to participate fully in government-funded childcare programmes. The competition from other providers and the lack of real opportunities to participate in these programmes are significant challenges for childminders.

7. Support for attracting and retaining childminders

7.1 Stakeholders and childminders interviewed outlined a number of areas that need to be addressed in order to support childminders in Wales as well as suggestions of actions required to support the retention of current childminders and attracting new ones into the profession. This section outlines some of these suggestions.

7.2 As indicated by the data reviewed in chapter 4, one of the main issues impacting the decline of childminding numbers is the lack of new childminders registering to deliver a service. Childminding offers a number of benefits to those working in the industry (see sections 6.9 to 6.13) and stakeholders interviewed recommended that these identified benefits should be promoted widely to those considering a career in childcare (see recommendation 1 section 8.11). This could be in the form of local case studies or, as some local authorities suggested through a national awareness raising campaign. It was suggested that the benefits promoted should include:

- The opportunity to run your own business / be your own boss;

- Career progression opportunities;

- Benefits of working more closely with a smaller group of children;

- Working from home and providing a home from home environment.

7.3 The cost and process of registering as a childminder has been identified within this report as a potential entry barrier (see section 6.15 to 6.19). To address this, stakeholders suggested that the registration process should be streamlined(see recommendation 2 section 8.12), and approval decisions based on applications. turned around more rapidly where possible. It was also suggested that funding to support registration costs should be offered to all new applicants, and that the level of funding support available should be consistent for applicants across all local authority areas (see recommendation 4 section 8.12). This would build on the Business Wales Childcare Business Support Grant programme which offered similar startup funding support for childminders. The evaluation of the support grant found that the funding speeded up the process of becoming a childminder but did not necessarily incentivise people to become childminders. Hence the need for this to be accompanied (as noted above) by activities to promote the career benefits of childminding.

7.4   The findings of this review have identified a number of challenges faced by childminders, some of which have encouraged individuals to leave the profession. As well as outlining these challenges many of those interviewed and surveyed also offered suggestions as to how some of these could be addressed, or at least reduced, and in so doing retaining more childminders within the industry and reducing the high number of cancelled services recorded each year. Many of these are reflected in recommendations 8 to 14 in sections 8.17 and 8.18 below)

7.5   A commonly reported issue among childminders was the administrative burden of the role, while some childminders felt that the level of paperwork required was manageable, many reported it was an increasing challenge that was difficult to manage, and for some a reason to give up childminding (see sections 6.40-6.52). While it was recognised that PACEY already provide useful guidance to childminders regarding paperwork, many felt that childminders require more clear and consistent guidance and support with paperwork. One of the key areas childminders find challenging is producing and updating policy and procedure documents, particularly in relation to meeting CIW inspection requirements. The challenges identified do not only relate to the volume of documents required but also childminders' knowledge of which policy documents they need to produce, what should be included within these documents and how they should be shared with parents, guardians, and other interested parties. Some childminders and stakeholders suggested that more policy and procedures document templates should be offered to childminders (this is something which is already offered by PACEY England). There was also a call for paperwork to be streamlined, with only the necessary paperwork being a requirement for inspections (see recommendation 9 section 8.17). It was also suggested that CIW inspection visits should be accompanied by informal CIW advisory visits, during which childminders could be advised which policy and procedure documents they need to produce or update in order gain a good inspection visit report (see recommendation 11 section 8.17).

7.6   Some of the paperwork and administrative challenges are being addressed by CIW and others (e.g. Welsh Government in relation to the Childcare Offer administration requirements) by moving away from paper-based administration towards online digital processes. This has been welcomed by some, but considered an additional challenge by others particularly those who are not digitally literate. It was suggested therefore that more support in the form of IT and digital training should be provided

to childminders who wish to improve their digital literacy skills (see sections 6.53-6.56 – see also recommendation 10 section 8.17)).

7.7   Many childminders consider CIW inspections to be a considerable challenge. Although necessary, many childminders noted that they find the inspection process stressful, and that the inspection visits make them very anxious. Some childminders feel that the inspections focus only on being critical and are not accompanied with any guidance or support. Some also feel that the inspections are inconsistent and that inspectors do not sufficiently acknowledge that childminding settings are the childminders home as well as their place of work (see section 6.57-6.63). Several suggestions were offered as to how the inspection process could be changed. The main suggestion was to ensure a consistent approach from inspectors. This could involve ensuring that all inspectors are consistently briefed as to what they should be focussing on during each visit and that this information should be shared with childminders in advance of each visit. There was also a call for more information generally for childminders about the inspection process to help them prepare and make them feel less anxious about the process (see recommendation 13 section 8.17).

7.8   There was also a suggestion that in order to ensure consistency and continuation in inspections, childminders should, where possible receive the same inspector during each inspection visit (see recommendation 12 section 8.17). Linked to the suggestion noted above, an additional suggestion by stakeholders was that CIW inspectors undertake informal visits with childminders in-between inspections to give advice on the inspection process and what is expected (see recommendation 12 section 8.17). It was also acknowledged that CIW does not currently have the capacity to accommodate such changes, and therefore additional resources would be required to enable these to take place.

7.9   A common point raised by childminders surveyed and interviewed was that they felt underappreciated and valued. In particular it was felt that childminding settings were often considered to offer lower standards of childcare compared to other settings and that childminding as a profession was not always considered to be on a par with other childcare professions. It was noted that these misconceptions of childminding lower the morale of those already working in the industry and can deter others from considering childminding as a profession (6.72 to 6.76).

7.10   It was recognised however, that PACEY has done substantial work to try and raise the profile of childminders. However, many of those interviewed and surveyed felt that more was required to raise general awareness amongst parents, organisations and the wider public of the high level of professionalism at which childminders operate and the high standard of childcare they provide. This could either be done on a local level through local authority Family Information Services or communications activity supported by the Welsh Government (see recommendation 14 section 8.18). It was also suggested that more should be done to promote childminding as a career, outlining the benefits of working in the industry and the career progression opportunities it offers. This is already an area supported by PACEY, but could be further supported on a local as well as a national level through promotional activities undertaken by local authorities, Careers Wales and the Welsh Government (also linked to recommendation 1 in section 8.11).

7.11   As outlined in sections 6.77 to 6.84 some childminders face a number of financial issues and business instability. However, despite this and the administrative challenges that childminders reportedly face, take up of business support opportunities aimed at childminders is relatively low (see sections 6.95 to 6.111). The findings indicate that many childminders turn to their fellow childminders to gain advice and support about their business as opposed to agencies such as Business Wales. PACEY offer some business advice and guidance to its members; however, it was suggested that childminders are not always aware of all the other business support services that are available to them and that many would benefit from accessing it. Stakeholders therefore recommended that further efforts may be required to raise childminders' awareness of the wider business support available to them, possibly through specifically targeted messaging. Business support services may also need to consider alternative ways of delivering support to childminders - possibly combining tailored support with childminder group or network activities (see recommendation 18 section 8.20).

7.12   Sections 6.104 to 6.111 outlined some of the barriers faced by childminders in some areas in being able to fully participate in government-funded programmes such as Flying Start and Early Education. The section also outlines the additional knock-on challenges that can stem from this, including the financial viability of trying to accommodate demand for half day provision as opposed to full day, and accommodating wrap around care including transport to and from other settings. It was suggested therefore that opportunities to deliver wider government funded

provision should be extended to childminders across more if not all local authority areas in Wales (see recommendation 19 section 8.21).

7.13   Accommodating increased demand for childcare places during certain times of the day - e.g. an hour before and after school and during lunch time when there is an overlap of children who only attend morning or afternoon sessions – while also complying with NMS child to adult staffing ratios, was identified as a common challenge for many childminders (see section 6.20 to 6.24). Some childminders reported that they have had to turn business away due to being over their numbers during overlap periods and this creates challenges to the financial viability of their business. While no suggestions were made that the overall NMS ratios should be increased, there was a call to include more flexibility in the way ratios can be applied during short periods of the day (see recommendation 15 section 8.19).

7.14   Some childminders and wider stakeholders outlined that the process of gaining planning permission to look after a larger number of children can be confusing and inconsistent (see section 6.25-6.30). It was suggested therefore that planning authorities across Wales should develop a consistent approach to dealing with planning permission requests submitted by childminders. It was also suggested that childminders should be provided with more information about planning requirements and how to apply for it and better communication between childminders and planning authorities. Funding to help childminders burden the cost of planning permission applications should also be considered (see recommendations 16 and 17 in section 8.19).

7.15   Childminders are required to undertake and often self-fund various mandatory training (see section 6.37 to 6.40). PACEY and some local authority Family Information Services provide free or discounted courses for childminders. These courses are also often delivered online or during evenings and weekends to enable childminders to access them outside of their usual working hours. However, this is not the case across all local authority areas. This led some of those consulted during to suggest that further funded training delivered during times that are convenient to childminders should be available across all areas of Wales (see recommendation 20 section 8.22. It was also noted that take up of non-statutory training among childminders can often be low – largely due to cost and timing of provision. However, it was also suggested that take up may be low in some cases because the benefits of undertaking it, such as supporting career progression, may not always be fully appreciated amongst childminders. It was suggested therefore

that the benefits of undertaking more non-statutory training should be further promoted to childminders.

7.16　Alongside suggestions for recommendations offered by childminders and wider stakeholders interviewed and surveyed, the literature reviewed also included suggested recommendations.

- Adequate funding is needed, and funding gaps should be addressed to ensure the availability of affordable childcare;

- Improved integration of family and children support services which would involve local authorities and central government working more closely together;

- A workforce strategy could be developed aimed at building the Early Years Workforce to combat issues around low recruitment and retention rates, and barriers to professional development;

- Increased support is needed to help childminders deal with paperwork and other administrative processes (see also recommendations 8 and 9 section 8.17);

- Provide more training around running a business to childminders (linked to recommendation 18 section 8.20);

- Consider flexibility around ratios (linked to recommendation 15 section 8.19;

- The benefits of childminding should be widely promoted to attract new childminders and address misconceptions about the role (see also recommendation 1 section 8.11);

- Support networks or group activities amongst childminders should be supported and facilitated, examples such as Magic Minders and the mentoring scheme in England could be looked at for Wales (see also recommendation 21 section 8.23).

8. Conclusions and recommendations

8.1 The findings of this review indicate that a passion for looking after children alongside the opportunity to be their own boss are key factors that have encouraged many individuals in Wales to choose childminding as their long-term career option. Other individuals choose childminding as a short-term career option, often based on the opportunity it provides to enable them to earn a living while looking after their own preschool age children or grandchildren at home. The childminder workforce therefore is made up of a stable core of individuals who have provided a service over many years and a transient group of individuals who register their service for only few years before moving on.

Decline in registered childminders

8.2 The number of registered childminders has declined sharply in recent years, at a time when the number of children's day care services has increased. The decline is driven by a relatively high and steadily increasing number of childminders leaving the industry each year accompanied by a low and rapidly falling number of individuals registering as new childminders. The annual number of childminding services cancelling their registration has outweighed the number of new childminder services registering by a ratio of between 1.5 to 2:1 each year since 2018. Although retaining current childminders in the industry should be considered a priority in terms of addressing this decline in childminders, attracting new childminders into the industry appears to be a bigger priority.

8.3 The findings indicate that there are push as well as pull factors that have contributed to the relatively high level of cancellations recorded in recent years. Challenges such as increased demands of paperwork, computer literacy (or lack of) and increased requirements to meet CIW inspections are among the factors that have pushed some childminders out of the industry sooner than they may have planned. Additional challenges created by the COVID 19 pandemic, also accelerated the rate at which childminders cancelled their registrations during 2020 and 2021. Opportunities to earn more money elsewhere is also one of the key factors that has pulled or drawn some individuals away from childminding.

8.4 The findings outline that entry barriers, including costs associated with training and registration have prevented or put off some individuals from becoming a childminder

and therefore contributed to the increasing decline in the number of new childminder registrations recorded since 2018. Opportunities to pursue other, often better paid career opportunities have also been identified as factors that have drawn some individuals away from considering childminding as a career option. The introduction of more flexible working arrangements in recent years, particularly post COVID, has enabled more parents and grandparents employed in a range of different jobs, to work from home. This has enabled them to work while also looking after their own children or grandchildren. As a result, fewer parents and grandparents are being drawn towards childminding as a means of achieving the same work / childcare balance.

8.5   Childminders often feel undervalued and underappreciated. This is often fuelled by misconceptions held by some parents and wider stakeholders that childminding as a profession and a service, is somehow of a lower quality or standard than other areas of the childcare sector. This appears to lower morale amongst existing childminders and serves as a further entry barrier to individuals considering childminding as a career option.

Availability of data

8.6   Although trends in childminding registrations and cancellations can be tracked on a regular basis on a national level (largely through data available from CIW and StatsWales) the same consistent time series data is not publicly available on a local authority level or lower. Relatively little is therefore known about recent trends in availability and make-up of childminding services on a local level other than childminders are more likely than day care services to be located in urban settings, and less likely to be located in rural villages. Data available on a local level also indicates that, more childcare settings are available in less deprived areas compared to more deprived areas and that childminders make up a lower proportion of all childcare settings in more deprived areas than in less deprived areas.

8.7   This review has identified a number of the challenges faced by childminders and outlined reasons why some leave the industry early while others may be reluctant to register or join. However, there is very little consistent and representative data available to evidence the extent to which these challenges or issues change or remain in place over time.

8.8   Despite these data gaps and shortfalls in availability, the review findings do offer a clear indication on an all-Wales level, of the impact that the rapid decline in the number of childminders is having on access to and parental choice of childcare provision. The findings outline that the decline in childminders is likely to impact negatively on the availability of childcare in some areas more than others. Although the overall availability of Welsh language childcare provision has increased in recent years, its availability across childminders has fallen sharply - again limiting childcare choice of and access to Welsh language provision for parents in some areas of Wales.

Overview of actions required to reverse the trend

8.9   A sharp and continued decline in the number of registered childminders at a time when demand for childcare is likely to increase in the wake of plans to expand the availability of funded childcare, is potentially worrying. To reverse this declining trend, the challenges identified in this review that push some childminders out of the profession and deter others from entering it, need to be addressed.

8.10   Considering the likely future demand increases for childcare places, the findings presented in this report indicate that not only is there a need to increase the overall number of childminders operating in the childcare sector, but that those already operating need support to accommodate more childcare places. Many childminders already have more demand for places than they can accommodate. These childminders need support in accommodating some of this excess demand, possibly by introducing some relaxations to the NMS staffing ratios during some parts of the day and making planning application processes easier to enable childminders to expand their provision where possible. Other childminders have spare capacity and therefore need support in filling vacant childcare places they have at their setting. Possible areas of support could include the provision of further support to promote and advertise individual settings that are operating under capacity. The childminding sector as a whole could also benefit from further support in promoting childminding to parents, guardians and wider stakeholders, outlining the good work and professional service they provide. This level of promotion would not only help fill vacancies within childminding settings currently operating below full capacity, but also address some common misconceptions currently held about the childminding profession.

Supporting new childminder registrations.

8.11 Attracting new childminders into the industry is vital to ensure sufficient availability of childminding services in the years to come. Promoting the benefits of childminding as a profession and a service to young people and new parents would help address negative perceptions of the service held by some and attract more individuals to consider childminding as a career.

Recommendation 1 – The Welsh Government, working in partnership with PACEY Cymru and local authorities, should consider a range of communication activities to help promote childminding as a career option to students and new parents.

8.12 Other barriers to entry identified within this review include the costs and time associated with the registration process. Supporting new entrants through this process should again encourage more individuals into the profession.

Recommendation 2- CIW should review the current childminding application process with a view to making it, where possible, more streamlined and easier for applicants to complete.

Recommendation 3 – CIW should continue to work with PACEY Cymru to support individuals with guidance, advice and training to enable them to complete the registration process as quickly as possible.

Recommendation 4 – The Welsh Government should support Business Wales to build on the 2020-2021 Childcare Business Support Grant programme, by administering a permanent grant programme to support entry into childminding. Business Wales and the Welsh Government should encourage local authorities and PACEY Cymru to market and promote the availability of the grant to potential new childminders.

8.13 The review findings outline that new childminders often consider the costs and processes associated with the mandatory training required as well as other costs and processes associated with setting up a new business to be higher than they can afford and the process complicated and potentially daunting.

Recommendation 5 – Further guidance and funding should be provided to newly established childminders to enable them to access the initial training they may require as well as support to deal with the startup administration tasks and costs. This should be coordinated by the Welsh Government working in partnership with PACEY Cymru and Business Wales who already offer support with these areas.

8.14   The findings of this review outline that in most cases, childminders face a higher demand for places than the places they have available. However, this is not true in all cases, particularly amongst newly established childminders. Childminders often rely on word of mouth as the main means of gaining new customers. This is more challenging for newly established childminders who, until they become established, are often less known within their areas as other more established settings. Most local authorities have a register of local childminders which can be accessed via their website. However, this does not always generate new custom for childminders, especially new childminders.

Recommendation 6 – local authorities need to ensure that all registered childminders are included on their local childcare setting directories. Local authorities may also need to increase the rate at which they actively promote childminders, particularly newly established childminders in their area.

8.15   The number of childminders who can deliver Welsh language provision has declined at a particularly sharp rate in recent years.

Recommendation 7 – Given the particularly sharp decline in the number of childminders who can deliver Welsh language provision, CIW, local authorities and the Welsh Government need to work with PACEY to place particular focus on attracting new childminders into the profession who can deliver their services through the medium of Welsh.

Supporting increased retention of childminders

8.16   Perceived high levels of administration paperwork and an increasing focus on digital / online processes has been highlighted as aspects of their day to day work that many childminders, particularly those who are less digitally literate, find challenging. A key aspect of the administration processes that childminders find particularly challenging and confusing is the level and nature of policy and procedure documents they are required to produce. Many childminders also find the CIW inspection process stressful and consider the process to be inconsistent and at times overly critical.

8.17   Administration and inspection processes are very important to ensure that childminding, along with all other childcare services, are delivered to the required

high standard. However, if the processes involved are encouraging some childminders to leave the industry, then some reform to the current processes are likely to be required.

Recommendation 8 – CIW and Welsh Government working with PACEY Cymru, should offer further support to childminders outlining what policy and procedure documents they need to produce, what the content of these documents should be and who they should share these documents with.

Recommendation 9 – CIW and the Welsh Government, working alongside other partners including PACEY Cymru, should review the current paperwork which childminders are required to produce with a view of streamlining or simplifying some aspects of it where possible.

Recommendation 10 – The Welsh Government, working with PACEY Cymru, should consider offering more funded IT and digital literacy courses for childminders aimed at helping them to deal with the increased digital focus being introduced across all administrative processes.

Recommendation 11 – CIW should consider offering childminding settings the opportunity to receive informal visits from inspectors, in-between formal inspections, so that they can be advised on what they can expect during the inspection and areas they may need to address prior to a formal inspection. The Welsh Government would need to allocate further resources to CIW to enable this to happen.

Recommendation 12 – where possible, CIW should ensure that the same inspectors undertake formal inspections at childcare settings during each visit. This would ensure increased consistency for individual settings and continuity in the onsite inspection processes.

Recommendation 13 – where required, CIW may need to ensure that all inspectors receive the same briefing as to what they should be focussing on during each visit. This information should also be shared with childminders in advance of each inspection visit. This would again ensure consistency in the inspection process.

8.18   The findings of this review indicate that feeling underappreciated and undervalued is a factor that encourages some childminders to leave the profession, as well as deter some others from joining the profession. These feelings of underappreciation

are linked to the points outlined earlier in relation to common misconceptions held by some about childminding as a profession and a service. PACEY Cymru already does a lot to try and address this through positive promotional campaigns outlining the benefits of childminders. However, given the low level of morale that continues to exist amongst many of the childminders interviewed and surveyed as part of this review, it would appear that PACEY's current support needs to be accompanied by more from elsewhere.

Recommendation 14 – The Welsh Government working with local authority Family Information Services and PACEY Cymru should raise the profile of childminders through promotional activities highlighting the high level of professionalism, skills and standards of childcare offered by childminders.

Supporting childminders to accommodate more demand for childcare places

8.19   In many areas, demand for childminder places exceeds available capacity. Increasing the overall number of registered childminding services is one way of addressing this. However, findings outlined in this review indicate that some existing childminders could accommodate additional demand but are limited from doing so because of NMS staffing to child ratios and challenges accessing planning permission to increase their current capacity.

Recommendation 15 – CIW should consider introducing more flexibility in the way childminders can apply NMS staffing ratios during short periods of the day to enable childminders to better accommodate out of school childcare before and after school as well as overlapping wrap around care during lunchtimes.

Recommendation 16 – The Welsh Government should work with planning authorities across local authority areas in Wales to provide childminders with more information about planning application requirements to enable them to expand the capacity of their provision. Better communication is also required between planning authorities and childcare services within local authorities to ensure that information relating to planning is conveyed to childminders in a consistent and relevant way.

Recommendation 17 – The Welsh Government and local authorities should consider providing additional funding support for childminders to help them with the costs associated with planning applications.

Supporting childminders to be more financially viable and sustainable.

8.20   Some childminders face a number of financial issues and business instability. Business support for childminders to help address some of these issues is currently available through PACEY and Business Wales. However, take up of business specific support appears to be relatively low amongst childminders.

Recommendation 18 - Building on the recommendation included in the evaluation of the Childcare Business Support Grant, to resource a larger promotional campaign to reach individuals who are not already on the journey into childminding, further efforts may be required to raise childminders' awareness of the wider business support available to them through agencies such as Business Wales. This could possibly be achieved through specifically targeted messaging. Business support services may also need to consider alternative ways of delivering support to childminders - possibly combining tailored support with childminder group or network activities.

8.21   Childminders in some local authority areas outlined are not able or even allowed to fully participate in government-funded programmes such as Flying Start and Early Education. Additional challenges that can stem from this, including the financial viability of trying to accommodate demand for half day provision as opposed to full day, and accommodating wrap around care including transport to and from other settings.

Recommendation 19 – Local authorities, with the support of the Welsh Government, should consider extending opportunities to deliver wider government funded provision to childminders across all local authority areas in Wales.

Supporting childminders' resilience

8.22   Accessing non statutory as well as statutory required training is an important aspect of ensuring that childminders continue to deliver high quality childcare and maintain a high level of professionalism. Training also increases career progression opportunities for childminders, either by enabling them to expand or improving their current service, or to enable them to progress into other areas of the childcare sector at some point in the future. Examples were offered during the review fieldwork of local authorities providing training sessions during evenings and weekends to enable childminders to attend outside their working hours. However,

findings presented in this report suggest that some childminders continue to find it difficult to access training during times that are convenient to them. The findings also indicate that many childminders do not consider career progression, and therefore any training associated with it, to be relevant to them and are therefore less likely to take up any training that is not mandatory.

Recommendation 20 – all local authorities should consider delivering training, particularly mandatory training, to childminders at times that are convenient for them. Online courses could be one way of achieving this but is unlikely to be the solution or preferred option for all childminders. As such a focus on face to face training delivered during evenings and / or weekends should also be a consideration. Where possible this training should be fully funded or offered at a discounted rate.

8.23 Childminders often rely on each other for support and guidance, and many are part of local informal networks of childminders that have developed over time. The findings of this study outline that for many childminders these networks help them overcome some of the feelings of isolation they experience at times. However, COVID 19 restrictions limited many of the opportunities childminders previously had to meet informally during the day. Furthermore, childminders who leave the profession, and therefore leave the network, are often those who have most experience and served as informal mentors to others, particularly new childminders within these informal networks. Informal networks already in place also provide a valuable platform through which other areas of support including training as well as business and administration support, could potentially be delivered to childminders. Some examples of more formal support can also be seen from the Magic Minders Worthing[21] group and the new childminding mentoring service in England, these types of schemes/groups could be explored to see if they are possible for Wales.

Recommendation 21 – Local authorities working alongside PACEY Cymru should actively support and possibly accommodate local childminder network meetings and events. Newly registered childminders could be introduced to these networks so that they can gain support from their peers. Some training and other support activities could also be delivered to childminders via these networks.

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[21] Magic Minders - Worthing Childminders Association

Learning more about the needs of childminders

8.24   The findings of this review have outlined some trends relating to rates of childminder registrations and registration cancellation over time. The findings also outline a number of benefits and challenges associated with childminding gathered from secondary data available in other published literature as well as primary data gathered from interviews and surveys undertaken as part of the review fieldwork.

8.25   However, the review has also outlined shortfalls in the public availability of time series data on a local level and data gaps relating to the characteristics of the childminding workforce.

Recommendation 22 – SASS and other data relating to registrations and cancellations of childminder registrations needs to be gathered annually by CIW and the Welsh Government in a consistent manner on a LSOA level. This data also needs to contain information relating to the characteristics of childminders e.g. age, gender and language of setting.

Recommendation 23 – the Welsh Government should consider undertaking or commissioning regular research relating to the opportunities and challenges faced by childminders in Wales in order to review the extent to which these challenges change or remain in place over time. This will inform the Welsh Government, and other stakeholders of the type of ongoing support required to increase the number of childminders operating across Wales.

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Annex A: Number of childminders and Childrens day service per local authority

Table A1: Number of registered Childminders, Childrens Day Care settings and all Childcare Services in each Local Authority (February 2023) – ranked in order of number childminders

Local Authority	Child Minder	Childrens Day Care	Total
Cardiff	214	188	402
Rhondda Cynon Taf	121	107	228
Vale of Glamorgan	113	79	192
Caerphilly	108	102	210
Flintshire	96	118	214
Carmarthenshire	90	137	227
Swansea	80	97	177
Powys	78	108	186
Newport	77	71	148
Pembrokeshire	67	71	138
Neath Port Talbot	67	63	130
Bridgend	63	61	124
Gwynedd	58	98	156
Conwy	56	84	140
Ceredigion	56	46	102
Wrexham	50	141	191
Monmouthshire	44	54	98
Isle of Anglesey	42	54	96
Denbighshire	33	78	111
Torfaen	33	47	80
Blaenau Gwent	33	22	55
Merthyr Tydfil	11	28	39

Source: CIW Data Tool

Table A2: Number of registered Childminders, Childrens Day Care settings and all Childcare Services per 1000 population of 0 to 12 year olds – (ranked in order of number childminders per 1000 population)

Local Authority	Child Minder	Childrens Day Care	Total
Ceredigion	49	137.2	186.2
Vale of Glamorgan	44.8	157.62	202.5
Isle of Anglesey	36.9	169.09	206
Powys	35.8	176.78	212.6
Flintshire	33.8	195.22	229
Pembrokeshire	32.4	125.77	158.2
Cardiff	31.7	144.24	175.9
Conwy	29.9	203.81	233.7
Neath Port Talbot	28.7	97.16	125.8
Caerphilly	28.6	117.43	146
Gwynedd	27.5	167.64	195.2
Monmouthshire	27.2	163.07	190.2
Carmarthenshire	26.7	135.56	162.3
Rhondda Cynon Taf	26.3	101.48	127.8
Newport	25.3	115.79	141.1
Bridgend	23.2	109.29	132.5
Blaenau Gwent	22.8	77.07	99.9
Denbighshire	19.5	219.54	239.1
Swansea	18.8	118.71	137.5
Wrexham	18.5	279.86	298.3
Torfaen	18.1	126.48	144.6
Merthyr Tydfil	7.2	77.07	84.2

Source: CIW Data Tool

Annex B Childminders Survey Questionnaire

The childminder survey was included within a wider survey distributed to all childcare providers delivering the Childcare Offer for Wales. The survey was also distributed to childminders who were not delivering the Childcare Offer.

Childminder 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.

[text box]

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	☐	☐	☐	☐	☐	☐
Not being able to accommodate / meet the high demand for childcare places I have available	☐	☐	☐	☐	☐	☐
Low demand / not being able to fill the childcare places I have available	☐	☐	☐	☐	☐	☐
Costs and expenses of running my childminding business	☐	☐	☐	☐	☐	☐
Accessing business support	☐	☐	☐	☐	☐	☐

	1 = **not a challenge at all**	2	3	4	5 = **a considerable challenge**	Not applicable
Planning permission	☐	☐	☐	☐	☐	☐

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

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

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

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

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118

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	☐	☐	☐	☐	☐	☐
Hours worked each day / week	☐	☐	☐	☐	☐	☐
Career progression opportunities	☐	☐	☐	☐	☐	☐
Level of paperwork and administration	☐	☐	☐	☐	☐	☐
The need to use IT/ a computer / internet	☐	☐	☐	☐	☐	☐

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	☐	☐	☐	☐
Hours worked each day / week	☐	☐	☐	☐
Career progression opportunities	☐	☐	☐	☐
Level of paperwork and administration	☐	☐	☐	☐
The need to use IT/ a computer / internet	☐	☐	☐	☐

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	
Email address	
Telephone number	