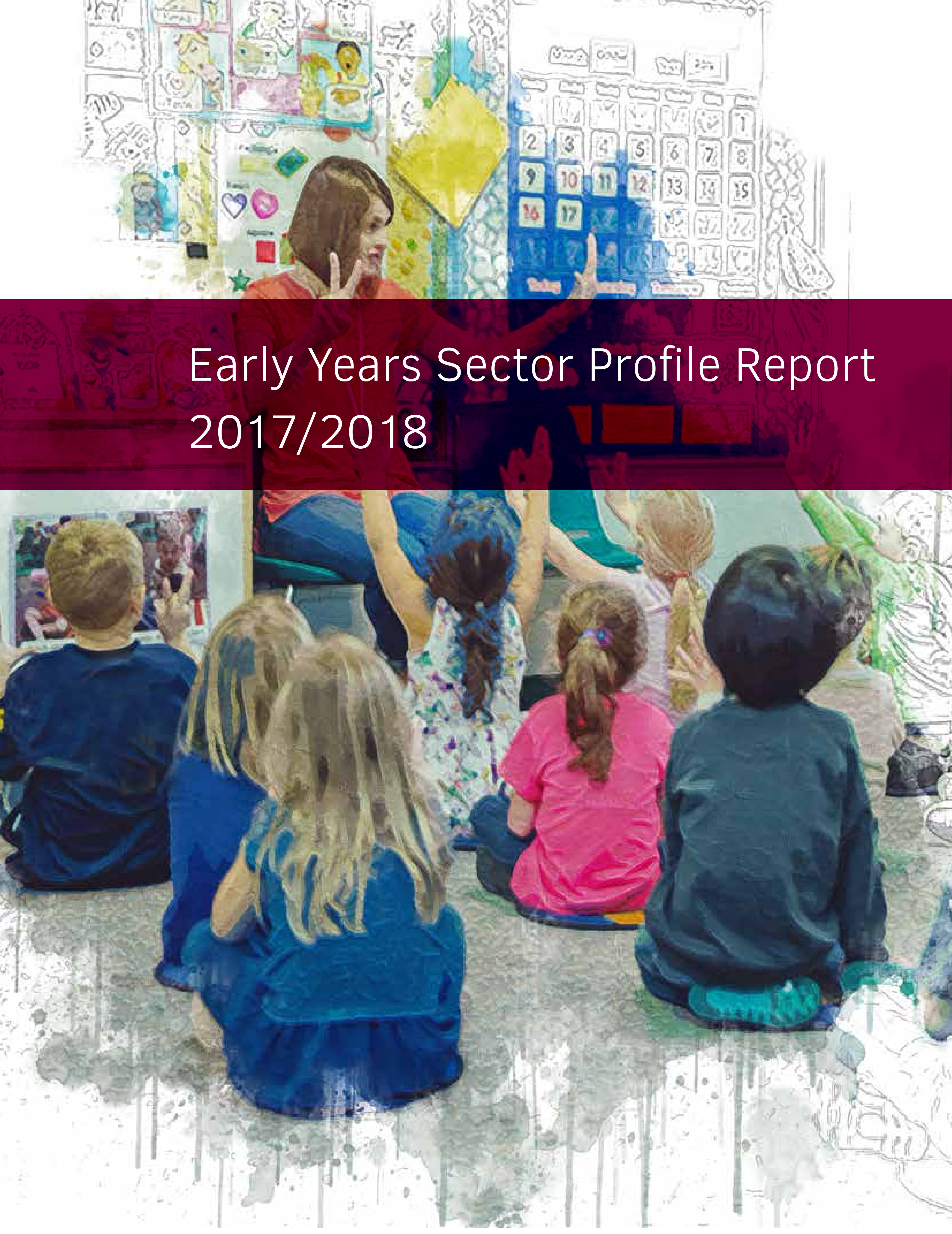

Early Years Sector Profile Report 2017/2018

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

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government supporting communities

Pobal wishes to thank all those involved in the analysis and write up of this report, namely Fiona Brennan, Marian Cahalan, Dr Patrick Collins, Peter Dowie, Ciara Flanagan, Dr Ela Hogan, Brendan O'Keeffe, Martin Quigley, and June Simmons.

Minister's Foreword

I am very pleased to launch the Early Years Sector Profile Report for 2017/2018. This is the third year I have had the pleasure of launching the report, which comes at a time of continued and rapid growth for the early years sector.

My Department has overseen greater state investment in early years than ever before resulting in an increased number of children benefitting from government funded childcare programmes. The increased funding for childcare and youth services, announced in Budget 2019 represents another significant step in ensuring access to high quality, affordable childcare for all children.

This year, for the first time, every child in the country, up to the age of six years, has had access to a Government childcare subsidy via universal or targeted programmes. I am delighted that in excess of 185,000 children have benefitted from these subsidies this year.

Alongside ongoing investment in the early years sector, I am committed to evidence-based policy development. The data and findings from the Early Years Sector Profile Report play an important part in tracking progress and changes within the sector as well as identifying emerging needs. The data will also inform the implementation of the Affordable Childcare Scheme and will ensure that the sector is prepared for the roll-out of this important initiative.

Particularly notable from this year's report is the increase in the number of children using centre-based care and in the numbers of staff employed in these centres.

I am delighted to see that these early years professionals are becoming increasingly more qualified as the survey reflects. It is undeniable that skilled, highly qualified staff are a vital component of our childcare provision. However, the report also highlights the ongoing issue of staff wages and I am fully aware that retaining qualified staff remains a concern for many services.

This year's survey has had the highest response level to date, with over 3,900 services completing it. I would like to express my gratitude to each and every one of them for taking the time to do so. The high volume of responses this year is a testament to how highly evidence-based policy development is regarded within the childcare sector itself.

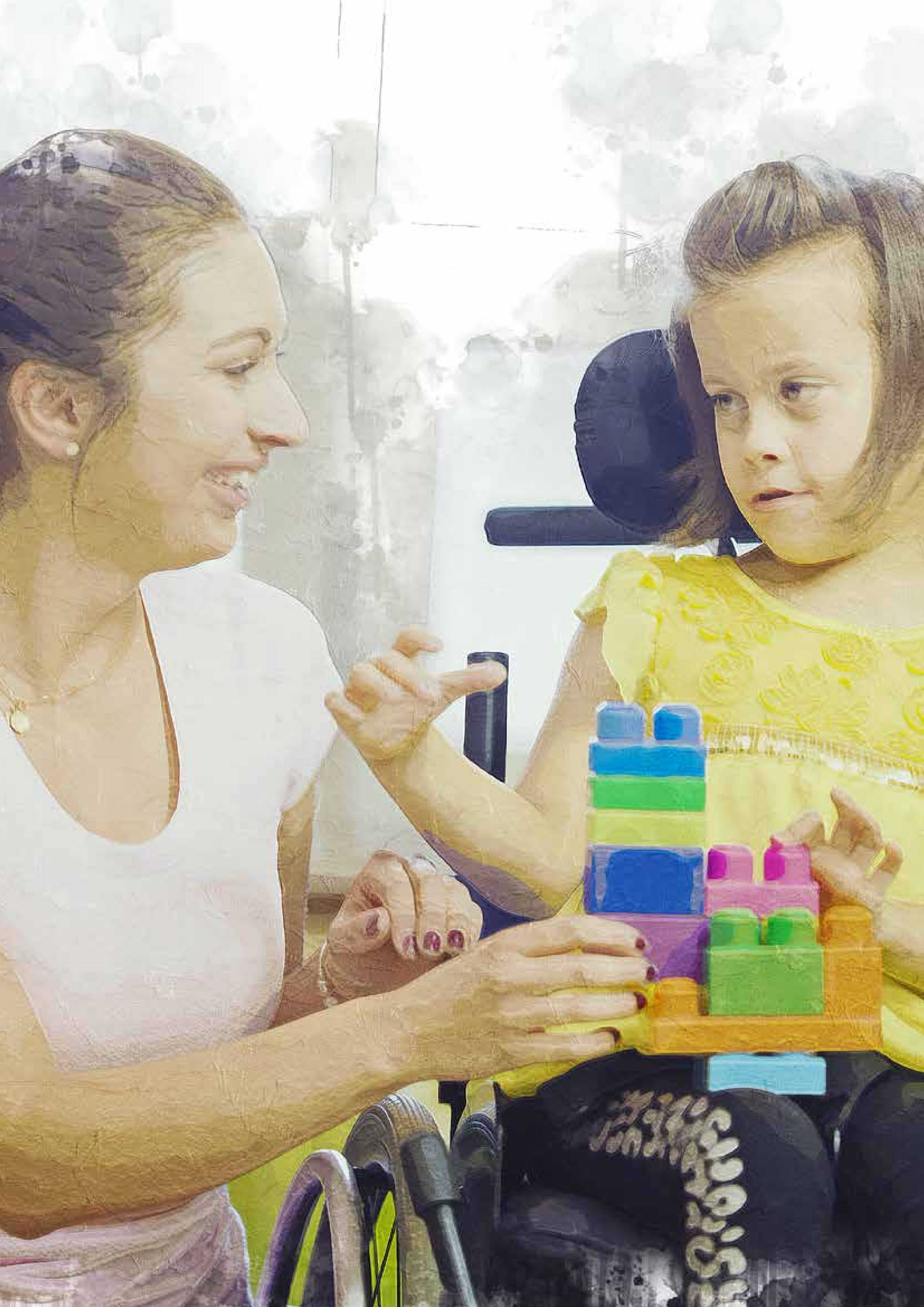
I would also like to thank the City and County Childcare Committees and Voluntary Childcare Organisations for promoting the survey through their wide networks. As always, I wish to express my gratitude to the team at Pobal for not only the administration of the survey but also the data analysis and the production of the report itself.

I remain committed to ensuring access to high quality and affordable early childhood care and education throughout Ireland. My Department has overseen an ongoing increase in Government expenditure in childcare through four successive budgets and I believe it is critical that we continue to ensure the increased investment continues into the future.

Childcare providers, parents and most of all, our children, who are at the centre of everything we do. They deserve nothing less than this and I, along with my Department, will continue working towards this aim of affordable and accessible quality childcare provided by highly qualified and respected professionals.

Katherine E. Zappone

Dr Katherine Zappone,
Minister for Children and Youth Affairs



Message from the CEO

The Early Years Sector Profile report 2017/2018 is a comprehensive source of information on the early years sector in Ireland. Its importance is increasingly recognised among childcare services, with 3,928 services completing the survey this year – the highest number in its 16 year history. Through this report, Pobal shows its commitment to providing accessible and useful data that supports evidence-based policy making. We hope this analysis of the sector will assist Government in what is a rapidly expanding sector and act as an important information source in the national discussion on the direction of childcare in the future.

Pobal continues to support the Department of Children and Youth Affairs (DCYA) in transforming the early years sector by not only providing evidence, but mainly through the administration of schemes and channelling funding to childcare services. This year, in particular, we have supported the DCYA with a further expansion of targeted schemes, the introduction of universal subsidy for children less than three years old and the preparation for the introduction of the Affordable Childcare Scheme.

I am pleased to see a childcare model that supports social inclusion, welcomes all children as equal participants and provides them with the opportunities they need to reach their full potential. The impact of the Access and Inclusion Model has ensured that children with disabilities can access and fully participate in Early Childhood Care and Education, which includes removing barriers and catering for the individual needs of the child. There has also been a year-on-year growth in the enrolment of children from the Travelling Community accessing centre-based childcare. This means less children will be entering primary school at a disadvantage.

I would like to thank all those who responded to the survey and provided valuable information, the report could not have been produced without these inputs. I would also like to take this opportunity to thank the team responsible for the survey administration, analysis of data and the production of the report. Pobal continues to develop and employ data science skills to improve our support to communities, including the early years sector. I am particularly delighted that Pobal's use of data science was recognised this year as Pobal won the 2018 DatSci Award in 'Best Use of Data Science in a Public Sector Body' for its Geosparcity Index tool. The tool was developed to identify areas and communities most in need of capital investment for childcare services.

Last but not least, I would like to thank our colleagues in the Department of Children and Youth Affairs for their continuous support and the importance they place on evidence to shape important policy priorities.

Denis Leamy

Denis Leamy
CEO, Pobal

Glossary of terms

ABA	Applied Behaviour Analysis
ABC	Area-Based Childhood Programme
ACS	Affordable Childcare Scheme
AIM	Access and Inclusion Model
ASCC	After-school Childcare Programme
ASD	Autism Spectrum Disorder
CCC	City/County Childcare Committee
CCS	Community Childcare Subvention
CCSP	Community Childcare Subvention Private
CCSPlus	Community Childcare Subvention Plus
CCSR	Community Childcare Subvention Resettlement
CCSRT	Community Childcare Subvention Resettlement (Transitional)
CCSR(T)	Jointly refers to CCSR and CCSRT
CCSU	Community Childcare Subvention Universal
CE	Community Employment programme
CEC	Community Employment Childcare
CEC(AS)	Community Employment Childcare (After-School)
CEC(PS)	Community Employment Childcare (Pre-School)
CETS	Childcare Education and Training Support Programme
CSO	Central Statistics Office
CSP	Community Services Programme
DCYA	Department of Children and Youth Affairs
DEASP	Department of Employment Affairs and Social Protection
DES	Department of Education and Skills
DLP	Designated Liaison Person
ECI	Early Childhood Ireland
ECCE	Early Childhood Care and Education Programme
ECEC	Early Childhood Education and Care
ED	Electoral Division
ETB	Education and Training Board
EYC	Early Years Capital
EYSPR	Early Years Sector Profile Report
EYEPU	Early Years Education Policy Unit
HR	Human Resources
HSE	Health Service Executive
JI	Job Initiative Scheme
LINC	Leadership for INClusion in the Early Years
NFQ	National Framework of Qualifications
PIP	Programmes Implementation Platform
TEC	Training and Employment Childcare
VCO	Voluntary Childcare Organisation

Executive summary

This report presents an overview of the early years sector in Ireland for the programme year 2017/18. It outlines the findings and analysis of the data captured from two sources: the Early Years Service Profile survey, completed by 88% of early years services in late April and early May 2018, and the Programmes Implementation Platform (PIP). Due to the continued growth of the sector and the survey response rate achieved, this is the largest ever survey of the early years sector, completed by 3,928 early years services. The following are the key findings:

Programme enrolment and childcare services

Over the programme year 2017/18, **185,580** children availed of one of the three Department of Children and Youth Affairs (DCYA) funded programmes: Early Childhood Care and Education (ECCE), Community Childcare Subvention (CCS) (including CCS, CCSPlus and CCSU) and Training and Employment Childcare (TEC). This represents **an increase of 24%** (36,154) on the previous year. This growth was primarily driven by the introduction of the universal subsidy (CCSU) and growth in the number of children participating in CCS, both in community and private settings.

The total number of early years services contracted to deliver at least one programme was 4,543, an increase of 95 services or 2%.

Over the programme year 2017/18, **118,899 children benefited from ECCE**. This represents a 2% decline on the previous year. This change corresponds with the decrease in the overall number of children in the age cohort between 3 and 5 years old. The total value of the ECCE contracts in 2017/18 was €262,773,943.

The number of providers contracted to offer CCS and/or CCSPlus almost doubled from 1,728 in 2016/17 to **3,417** this year. The greatest expansion has been among private providers and is largely driven by the rollout of CCSU[1]. The combined registrations value of CCS and CCSPlus in 2017/18 was €92,459,723.

Over the programme year, the total number of children availing of CCS, both in community and private facilities, was **38,846** – an increase of 43% on the previous year.

The total number of **children who availed of CCSU supports** during the 2017/18 programme year was **39,319**. Almost two thirds of services (65% or 2,188), that had CCSPlus contracts, had at least one child registered under CCSU.

1 Services who had a CCSPlus contract were entitled to register children under CCSPlus, CCSU and CCSRT.

In 2017/18, 1,659 services were contracted to offer at least one strand of TEC and almost all of these offered CETS (97%). A total of 4,655 children availed of TEC over the entire programme year. While the number of services offering TEC increased, **there was a 27% decline in the number of children availing of the programme**. This follows a 10% decline recorded last year. The lower take up of TEC places is likely to be associated with the improved economic situation in the country and, therefore, a smaller demand for TEC supports. The total value of TEC contracts came to €12,062,492.

A total of **343 Early Years Capital and School Age Childcare (EYC and SAC) contracts**, to a value of €5,595,526, were signed with providers in 2018.

Inclusion and disability

There has been continued **growth in the number of Traveller children** attending early years services. The estimated number of Traveller children attending early years services increased by 8%.

Three-quarters (75%) of services cater for at least one child with additional needs and 65% of services have at least one child with a diagnosed disability attending.

The proportion of services with staff who have completed **the Equality, Diversity and Inclusion Training Programme has almost doubled** (from 33% to 63%) over the course of the year.

Spaces, capacity and waiting lists

It is estimated that there were **202,633 children** attending early years services during 2017/18. This represents **an increase of 9% on the previous year**. While the number of children grew across all age cohorts, the largest year-on-year increases were observed for children aged 5 years and over (20%). Children aged 3 to 5 years were the largest age group amongst those enrolled, representing 59% of all children enrolled.

The breakdown of children enrolled between community and private services was the same as that recorded last year, at 32% and 68%, respectively. Like 2016/17, a higher proportion of children (50%) attend community services from the age of 8.

The **number of vacant places continues to fall**, having declined from an estimated 15,892 to 11,021 since 2016/17. This **represents a contraction of 4,871 in the number of available places (31%)**. Conversely, for the first time in the last three years, there has been a decline (12%) in the estimated number of children on waiting lists.

The **overall estimated capacity increased by 6% to 213,654**, however this growth in supply is lower than the increase in demand as the number of children attending has grown by 9%. The vacancy rate (number of vacant places as a percentage of children enrolled) decreased from 9% last year to 5% in 2017/18.

The average **number of children per facility**, in services that completed the survey, was **44**, remaining the same as last year.

Fees

The **average weekly fee for full day care is €177.92**. This represents an **increase of €3.76** or 2.2% on last year. This is the second consecutive year of noticeable fee increases after several years of fee stagnation. The average weekly fee for part-time childcare is €101.82, an increase of 3.3% since last year.

On average, fees charged by services located in affluent locations are 39% higher than by those situated in disadvantaged areas. As in previous years, average fees are also **higher in urban areas** than in rural areas (€184.70 and €161.40 respectively for full day care per week) **and in private services** than in community services (€184.08 and €161.24 respectively for full day care per week).

Year-on-year **fee increases** for full day weekly care are **more evident in rural areas** (€2.56) than in urban areas (€1.94) and **among community services** (€6.35) than among private services (€2.56).

Statistical analysis shows that when factors such as location are accounted for, there is **no correlation between fees and the wages paid to staff**.

Staff

It is estimated that approximately 29,555 staff work in the early years sector, of whom 25,893 (88%) work directly with children. This is **an increase of 8% on the previous year**. This increase is in line with the increase in the number of children enrolled (9%). For the first time, this year's survey recorded details of relief staff working directly with children. Services, which completed the survey, reported 859 persons providing relief cover. These represent 3.7% of all staff working directly with children.

Almost **half the staff in the sector (47%) work part-time**. A higher proportion of them work in community services (57%) compared to 40% in private services. Almost all staff in private services (99%) and 80% of those in community services are direct employees, with the balance being recruited through various employment schemes/other government funded programmes.

The staff complement remains **predominantly female** – 98% of those who work directly with children and 82% of ancillary staff are female. The majority of staff (70%) are aged 44 years and under.

Staff qualifications

The **vast majority of staff working with children (94%) have qualifications at NFQ Level 5 or higher** and nearly two thirds (65%) have qualifications at NFQ Level 6 or higher. The proportion of staff with no childcare qualifications continues to fall, albeit slowly. It is now down to 6% from 7% in 2016/17.

The proportion of staff members who have signed the **'Grandfather Declaration'** remains the same as last year at **5%**.

3,783 staff were reported to be in in the process of attaining a qualification, of whom almost 80% (3,000), were studying at NFQ Level 6 or higher.

Staff wages and turnover

The **average hourly wage of staff working in the early years sector is €12.17**. This represents an **increase of 24 cent or 2%** on the 2016/17 rates (€11.93). The average rate for early years assistants (both ECCE and non-ECCE), who constitute 48% of all staff working with children, was €11.20 per hour. Rates of increase differed between different positions, ranging from 1.5% for deputy managers to 3.6% for early years assistants (non-ECCE).

The five main determinants of wages are (in descending order): staff position/job title, length of time working in early years sector, length of time in service, highest qualification attained and county.

Centre managers, on average, are paid the highest hourly rate at €14.99 per hour, while relief staff and early years assistants (non-ECCE) earn the least, €10.77 and €10.93 per hour, respectively.

There are notable **differences at county level in respect of wages**, with the average hourly rate ranging from €11.25 in Longford to €13.19 in Dublin City.

The annual **staff turnover rate is 25%**, which is down from 28% the previous year. The staff turnover rate differs across counties, from 18% in Clare to 34% in Donegal, with little overall change in the ranking of counties.

Just over a quarter of services (26%) reported having a staff vacancy, which is up from 21% in 2016/2017. Meanwhile, more than half (57%) reported difficulties in recruiting staff over the past twelve months – an increase of ten percentage points on the previous year.

Child protection

There has been **an increase from 58% to 70% in the proportion of staff who have completed Children First training** over the past three years.

1

Background and context

1.1 Introduction

This report presents an overview of the early years sector in Ireland for the programme year 2017/18. For the past sixteen years Pobal has completed an annual survey of the early years sector (previously called Annual Beneficiary Questionnaire and Annual Sector Survey), which in 2016 was replaced by the service profile survey. The survey has been integrated with the Programmes Implementation Platform (PIP) to utilise information already held about organisations on PIP. This report is based on data from the service profile survey and the data held on PIP (for more details, see Chapter 2).

The purpose of this report is to support evidence-based policy and planning, by bringing together and analysing the data held and collected from Ireland's early years service providers. Given the breadth of these data sets, a practical, issue-based approach has been taken to the analysis of this information. Following consultation with numerous stakeholders, the key issues of importance identified were: capacity, childcare fees, staff wages, staff qualifications, and staff turnover. As such, this report places a specific focus on these key issues, which are given greater attention and detail than others.

The report is structured as follows:

Chapter 1 presents the changes in the policy and funding context for the early years sector in the 2017/18 programme year and outlines the methodology used for data collection and analysis.

Chapter 2 provides an overview of the three early years programmes – Early Childhood Care and Education (ECCE), Community Childcare Subvention (CCS) and Training and Employment Childcare (TEC) – including statistics on the number of services participating, the number of registrations and the total funding received by providers for the delivery of these programmes. It also outlines key statistics on supports provided under the Access and Inclusion Model (AIM) and funding under Early Years Capital and School Age Childcare (EYC and SAC) 2016.

Chapter 3 analyses early years services with regard to their type, geographical location, types of childcare provided, premises ownership and location, commercial rates and curricula.

Chapter 4 offers an analysis of children in early years settings with regard to issues of equality, diversity and inclusion, and disability.

Chapter 5 provides an analysis of childcare places in respect of the number of enrolments, vacant places, children on waiting lists and the overall capacity within the sector.

Chapter 6 presents a breakdown of childcare fees by type of services offered, geographical location, organisation type, deprivation score and staff qualifications.

Chapter 7 gives an overview of staff working in early years services, including those working directly and indirectly with children. It provides analysis of staff profiles, their qualifications and wages.

Chapter 8 discusses issues related to child protection, such as staff training and policy.

1.2 Frameworks and supports

Better Outcomes, Brighter Futures – The national policy framework for children and young people 2014 – 2020 (DCYA, 2014) notes (in Goal 4) that a quality approach to supports and services must prevail in addressing the needs of children and young people. The policy framework envisions that services will be provided in child-/youth-friendly settings and delivered in ways that are accessible to all children and young people. The Government is committed to improving the quality and suitability of services, ensuring that State funded programmes and services are outcomes-focused and can clearly demonstrate improved outcomes over time. The framework declares that this requires, among other things, evidence and data analysis, information sharing and national tracking of outcomes. This report, through profiling of the early years sector, makes a distinct contribution to enhancing the lives of children and families in Ireland.

The early years sector in Ireland operates in a dynamic environment that is influenced by ongoing policy changes and developments. Over the past year alone, there have been a number of initiatives and announcements, relating to new funding arrangements, programme modifications, and roll out of new initiatives. These changes, in respect of policy and operating context, are outlined in the sections below.

1.2.1 Funding of the early years sector

As part of its plan to make childcare more affordable, the Department of Children and Youth Affairs (DCYA) introduced a universal subvention from September 2017[2]. This universal childcare subvention payment of up to €20 per week is available to families using eligible childcare providers for the care of children aged from 6 months to the first eligible point of entry to the ECCE programme. Chapter 2 outlines how the CCS programme's budget has been increased, and how the programme continues to include supports for the families of programme refugees and those affected by homelessness. In addition, there have been some changes to ECCE and TEC, and these are also outlined in relevant sections of Chapter 2.

In January 2018, the Minister for Children and Youth Affairs announced funding of €3.2 million for the latest addition to the suite of pre-school supports for children with a disability provided under the Access and Inclusion Model (AIM). AIM Inclusive Play is a set of resources to support inclusive practice within pre-school settings. These resources, which include equipment, toys and materials, support the development of coordination, audio, visual and tactile skills among all children, and in particular, children with a disability. The DCYA projected that from February 2018, AIM Inclusive Play would be distributed to more than 6,000 pre-school rooms delivering the ECCE programme across more than 4,000 pre-school settings nationally.

In respect of the programme support payment, Budget 2018 provided for an increase of €3.5 million in base spending, bringing the total funding available in 2018 and thereafter to €18 million. The payment, which was first introduced in 2016, is intended to make a contribution towards the costs involved in providing quality childcare that early years providers incur through non-contact work and administration. The budget increase for 2018 is comparable to the 2017 increase.

2 Payment of CCSU is facilitated through the Community Childcare Subvention Plus (CCSPlus) programme.

1.2.2 Early Years Capital and School Age Childcare funding 2017 and 2018

Early years capital funding is provided by the DCYA to support infrastructural improvements to childcare facilities. The funding is awarded on a calendar year basis.

The specific allocation for 2017 was announced in March 2017. €4 million was made available under three strands:

Strand 1: Additional childcare places (€3 million)
Strand 2: Building improvements and maintenance (€500,000)
Strand 3: Natural outdoor play areas (€500,000)

In December 2017, the Minister for Children and Youth Affairs announced that the 2018 financial allocation for capital investment would amount to just over €6.8 million, an increase of €2.8 million on the previous year. Childcare providers were invited to apply for grants to upgrade play areas, provide extra spaces and undertake maintenance. The funding programme for 2018 operated under five strands:

Early Years Capital (EYC)

• Strand 1:	New or expanding services	€3.86 million
• Strand 2:	Essential maintenance	€1 million
• Strand 3:	Natural outdoor play area	€1 million

School Age Childcare (SAC)

• Strand 4:	New or expanding services	€760,000
• Strand 5:	Essential maintenance	€250,000

2018 was the first year in which the capital schemes for both early years and school age services were administered at the same time. Services were able to apply for funds under both programmes (EYC and SAC), using a single application form on the Programmes Implementation Platform (PIP).

1.2.3 Programme modifications

The DCYA has undertaken a consultation process in relation to proposed changes to the rule on exemptions to the upper age limit for the ECCE programme. The process, which was coordinated by the National Disability Authority on behalf of the Ministers and Departments of Children and Youth Affairs and Education and Skills, involved a review of evidence and significant stakeholder engagement. The DYCA is currently concluding a report based on the above consultation process.

1.2.4 Leadership for INClusion in the Early Years (LINC)

Leadership for INClusion in the Early Years (LINC), which was established in 2016, is a Level 6 Special Purpose Award designed to support inclusion of children with a disability in the ECCE Programme.

The LINC programme is being delivered by a consortium, led by Mary Immaculate College, Limerick together with Froebel Department of Primary and Early Childhood Education, Maynooth University and Early Childhood Ireland (ECI). In September 2016, the first intake of childcare practitioners took their places on this Programme, with 847 graduates coming on stream in September 2017. For the current programme year, the DCYA provided funding for up to 900 LINC places and 852 students graduated from the course. In addition to training personnel, LINC delivers financial benefits to providers in the form of a €2 increase per child per week in the rate of ECCE capitation payable to a setting where the LINC graduate is employed.

1.2.5 Action Plan on School Age Childcare

Childcare providers have, over the course of 2017/18, worked to implement the objectives of the *Action Plan on School Age Childcare* (DCYA, 2017). This plan, which was launched in March 2017, and is coordinated by the DCYA, focuses on three main themes: access, quality and affordability. One of the first actions arising from the Action Plan was the establishment of a multi-stakeholder working group on the development of school age childcare quality standards, with representatives from the DCYA, Department of Education and Skills (DES), Tusla (the Child and Family Agency), childcare providers and school age childcare specialists. In March 2017, the DCYA announced €3 million to support the delivery of the Action Plan, and in collaboration with the DES, published a set of guidelines for schools[3].

1.2.6 Affordable Childcare Scheme (ACS)

The Affordable Childcare Scheme (ACS) was announced as part of Budget 2017. It seeks to replace pre-existing targeted childcare programmes with a single, streamlined and more user-friendly scheme and will include “wraparound” care for pre-school and school age children. Its objectives are to improve outcomes for children, to reduce poverty, to facilitate labour activation and to tangibly reduce the cost of childcare. The ACS will comprise a universal subsidy payable in respect of all children aged between six months and three years, as well as a targeted subsidy payable on a sliding scale, depending on the income of the household. The ACS is due to launch in 2019.

3 An outline of the funding stream is available on the DCYA’s website: https://www.dcya.gov.ie/viewdoc.asp?DocID=4153

1.3 Methodology

1.3.1 Data sources

The information for analysis provided in this report has been extracted from two data sources:

- Programmes Implementation Platform (PIP) (Sections 2, 3.1, 3.2 and 3.3)
- Service profile survey (Sections 3.44. to 3.7 and Chapters 4 to 8).

Early years services reported on within this report relate to individual services rather than organisations. For example, if an organisation operates three different services, the three services will be treated separately in this report.

1.3.1.1 Service profile survey

A total of 4,444 services with an active contract for the 2017/18 school year, were asked to complete the service profile survey. A link to the survey was posted on the PIP Portal on 16th April 2018, and services were given until 27th April 2018 to complete the survey. This deadline was subsequently extended to 11th May 2018 to allow services more time to complete the survey. **A total of 3,928 services completed the service profile survey, giving a response rate of 88%. Of those services, 1,068 were community services and 2,860 were private.**

1.3.1.2 Programmes Implementation Platform (PIP)

PIP is a live system which is updated daily. To ensure consistency across the different areas covered, all data was extracted on one date (19th June 2018). Please note that the figures included in Chapter 2 provide information about the three programmes on this ‘snapshot date’, and are not the final figures for the 2017/18 programme year. Summary figures for the entire programme year are included in Section 2.7.

1.3.2 Extrapolation methodology

The extrapolation technique employed for estimating the number of children and staff in the childcare sector was the same technique used as in previous Early Years Sector Profile reports. The technique allows for taking into account the size of services and the different response rates at county level. It uses the data on child registrations held on PIP to determine the relative size of services who completed the profile as compared with all services nationally.

To extrapolate the number of children nationally the following procedure was applied. For each county, the number of services contracted to provide at least one of the DCYA programmes and the corresponding number of registrations for these services were extracted from PIP. The next step was to look at the number of services who completed the service profile and match the corresponding number of registrations on PIP for these services. This allowed extrapolation of the percentage of registrations in services, who completed the service profile survey. Using this method also allowed for the extrapolation on the number of children accessing childcare by county. This percentage has also been used for the extrapolation of staff figures, as it is likely that the correlation between the number of staff and the number of children will provide a more accurate basis upon which to make estimates than by using the response rate.

1.3.3 Statistical analysis

In the search for correlation and factors of influence on certain parameters beyond the univariate analysis, various machine learning and statistical techniques to enhance multivariate analysis were used. In the case of fees and wages, regression tree modelling to identify the factors of influence on these target variables was utilised. The variables of interest are extracted from the sum of information gain across each node in the regression tree. These influence values were then scaled to see what percentage they accounted for among all the variables in the model.

1.3.4 Urban/rural methodology

The addresses of survey respondents, held on PIP were linked with the categorisation of the Central Statistics Office, which classifies each electoral district in the country as being on a scale of one to nine in terms of how urban or rural they are. Six of these categories are urban and three are rural. Using this information, it was possible to attribute an urban or rural value to each early years service, based on the electoral district within which their address is situated.

1.3.5 County methodology

The term county can be used to describe county divisions or local authority areas. In this report 'county' is used to describe local authority areas. Using the local authority areas as the main geographical unit allows for comparisons of services within large urban centres, i.e. Dublin, as well as within counties that include both large urban centres and rural areas, i.e. Cork. It is also aligned to the county classification of the County Childcare Committees (CCCs).

1.3.6 Presentation of data and analysis

In a small number of cases, adjustments were made to 'round up' or 'round down' percentages in charts and tables to ensure that percentages add to a total of 100% where applicable.

2

Overview of the Department of Children and Youth Affairs early years funding programmes

Overview of the Department of Children and Youth Affairs (DCYA) early years funding programmes

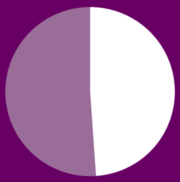
1,715
services were supported under the Access and Inclusion Model (AIM) benefitting 3,179 children

185,580 children availed of at least one of the three Government programmes (ECCE, CCS (incl. CCSU and CCSPlus) and TEC), an increase of 24% on the past year

38,846
children availed of CCS, both in community and private services, an increase of **43%**

27%
The decline in the number of children availing of TEC

€5,595,526
was invested in 343 early years services under EYC and SAC capital programmes



Almost half of services (49%) are in receipt of ECCE higher capitation

€364,733,004
The combined approved registration value of all three programmes,
an increase of **9%** on the previous year

38,846
children were supported under CCSU

2.1 Introduction

The Department of Children and Youth Affairs (DCYA) leads the effort to improve the outcomes for children and young people through investment in the early years sector, via a number of programmes[4]. Pobal provides a range of services to, and on behalf of, DCYA in the areas of early years education and childcare, and manages the distribution of funds for the following programmes:

- Access and Inclusion Model (AIM)
- Area-Based Childhood Programme (ABC)
- Better Start
- Community Childcare Subvention (CCS)
- Early Years Capital and School Age Childcare programmes (EYC/SAC)
- Free pre-school year in Early Childhood Care and Education (ECCE)
- Learner Fund
- Training and Employment Childcare (TEC)

In addition, the sector is supported by the City and County Childcare Committees (CCCs) and Voluntary Childcare Organisations (VCOs), with Pobal providing funding and technical support to these.

This chapter presents information and key trends for the following programmes – ECCE, CCS and TEC and provides a brief overview of EYC/SAC and AIM.

4 Information on the various programmes is available on the Department's website, at the following link: https://www.dcya.gov.ie/docs/EN/Childcare-What-we-Do/2210.htm

2.2 Early Childhood Care and Education (ECCE) – the 'free pre-school year'

Early Childhood Care and Education (ECCE) is a universal programme available to all children within the eligible age range. In 2017/18, eligible children were aged between 3 years and 5 years, 6 months. It provides children with their first formal experience of early learning prior to commencing primary school. The programme is provided for three hours per day, five days per week over 38 weeks per year and the programme year runs from September to June. Over the last two programme years there were three points of entry throughout the programme year – September, January and April.

Childcare services taking part in ECCE must provide an appropriate pre-school educational programme which adheres to the principles of *Síolta*, the national framework for early years care and education. Staff from local CCCs support participating services with assistive visits and advice. The State pays a capitation fee to participating playschools and childcare services. In return, they provide a pre-school service free of charge to all children within the qualifying age range for a set number of hours and days over a set period of weeks. Details of services offering ECCE can be viewed on Pobal Maps[5].

In the 2017/18 programme year, ECCE was available to all children from the age of 3 years. There were three entry points over the course of the year, in order to allow children to begin free pre-school as soon as possible after turning 3 years of age. Changes which came into effect from September 2018 saw programme eligibility extended to children aged two years and eight months and above.

In 2017/18, **4,242 services were contracted to provide the ECCE programme nationally – six fewer than in 2016/17. Of these, 76% (3,211) were private and 24% (1,031) were community – the same proportions as last year. Up to June 2018, 118,673 children benefited from ECCE, and there were 125,794 recorded registrations**[6]. These figures represent a slight decline (2% and 1%, respectively) on the equivalent figures for 2016/17. This suggests that, in relative terms, the level of coverage that was achieved in 2016/17 has been maintained, as the reduction in numbers is most likely associated with a 3% decrease in the number of children in the eligible age cohort[7].

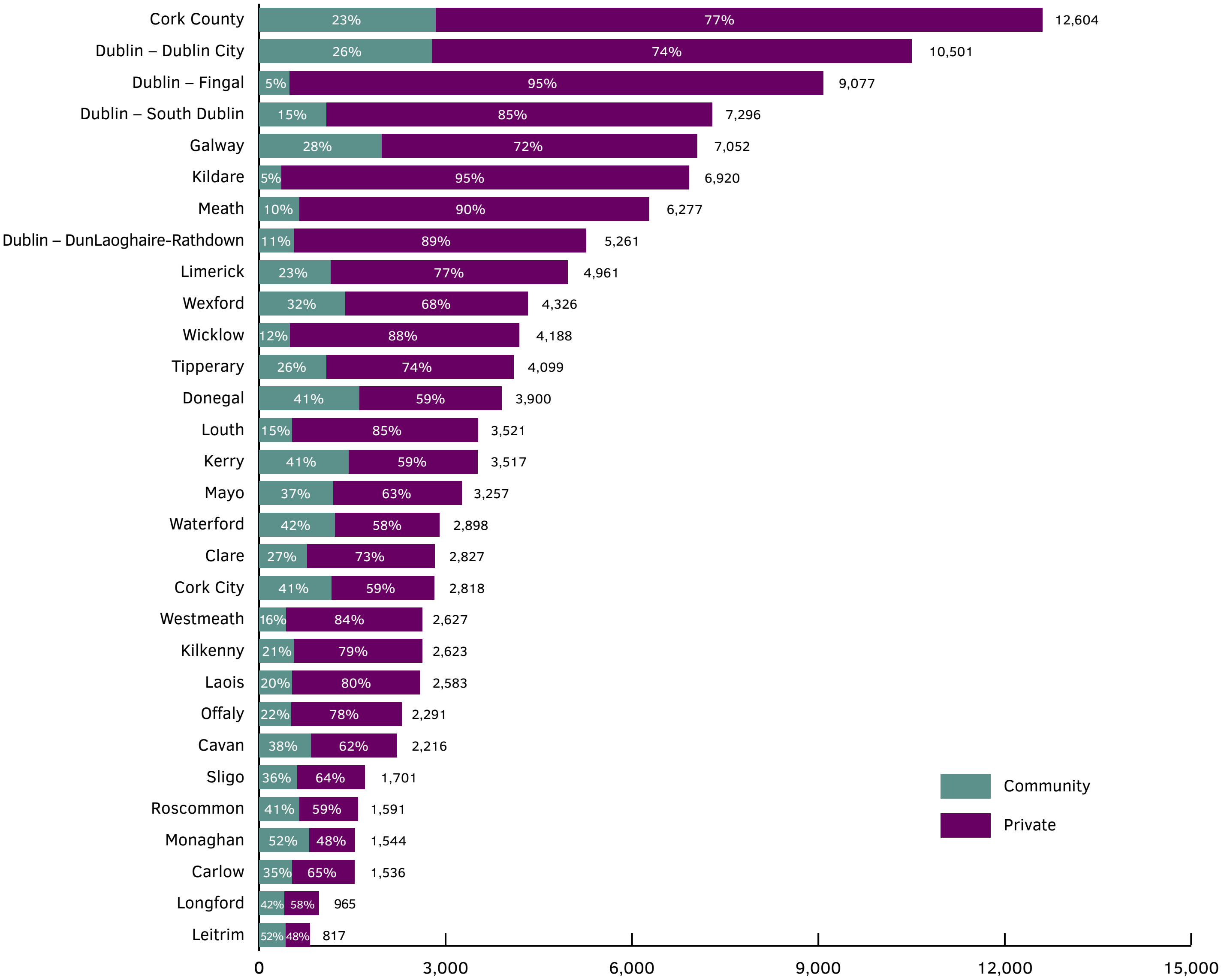
As was the case in 2016/17, the majority of registrations (77%) were in private services. Figure 2.1 provides a county level breakdown of ECCE registrations by type of provider.

5 https://maps.pobal.ie/

6 The number of registrations is greater than the number of children, as a child can be registered more than once. This occurs if a child moves from one pre-school to another over the course of the year. In exceptional circumstances, a child can be registered simultaneously in two services. For further details, please see: https://www.dcya.gov.ie/documents/earlyyears/20170724RulesForDCYAChild-careFundingProgrammes20172018.PDF

7 Central Statistics Office data shows that, in 2017, there were 134,389 children aged 3 -5 years of age (i.e., those aged 3 and 4 years) resident in the State. The corresponding figure for 2016 was: 138,911. This is a 3% decrease. These CSO figures can be accessed via the following link: https://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=E3003&PLanguage=0

Figure 2.1 Number of ECCE registrations by county, 2017/18



Policy changes introduced over recent years allowed for children turning 3 during a given programme year to be registered at two additional points of entry (January and April). This is reflected in the change in registration patterns over the past three years. In 2015/16, almost all registrations (94%) took place between September and December. In 2016/17, that proportion had fallen to 72%, as an increasing number of children were registered at other times during the year. A similar trend in registrations by intake period was reflected in 2017/18 (see Table 2.1).

Table 2.1 Number of ECCE registrations by intake period[8]

Intake period	2015/16	%	2016/17	%	2017/18	%
August/September – December	72,548	94%	91,902	72%	91,566	**73%**
January – March	2,969	4%	23,125	18%	22,153	**18%**
April – June	1,632	2%	12,608	10%	12,075	**9%**
Total	**77,149**	**100%**	**127,635**	**100%**	**125,794**	**100%**

The total value of approved ECCE contracts in 2017/18 was €262,773,943, which is only marginally less than the previous year (0.1%). This decrease is much smaller than the 2% decrease in the number of children availing of ECCE. This difference was primarily due to an increase in services providing ECCE and the inclusion of additional payments as part of the ECCE contract. This also included an increase in higher capitation payments and the inclusion of AIM Level 1 payments in the value of ECCE contracts.

Services participating in ECCE 2017/18 received one of two capitation rates[8]: the standard rate of €64.50, or the higher rate of €75.00. In 2017/18, almost half of early years services (49% or 2,060 services) had higher capitation levels for at least one room, an increase of 7% on the previous year. A larger proportion of private facilities (51%) have the higher capitation level, compared to community facilities (40%).

2.3 Community Childcare Subvention (CCS)[9]

Community Childcare Subvention programme is primarily aimed at supporting parents on a low income to avail of reduced childcare costs. The DCYA funds a portion of the childcare costs for eligible children (a subvention payment), while parents pay the remainder. A child had to be under 15 years of age to be eligible for CCS supports in 2017/18. However, no child could be eligible for a subvention if he/she was enrolled simultaneously on any other DCYA childcare programme. In the 2017/18 programme year, Community Childcare Subvention included a number of strands:

- CCS – Community Childcare Subvention
- CCSPlus – Community Childcare Subvention Plus
- CCSU – Community Childcare Subvention Universal
- CCSR(T) – Community Childcare Subvention Resettlement (Transitional)

Until early 2016, CCS was only available through community childcare services. In February 2016, it was then extended to private providers in the form of Community Childcare Subvention Plus (CCSPlus). In addition, in September 2017, the Government introduced universal childcare subvention funding – Universal Subsidy (CCSU). CCSU takes the form of a payment of up to €20 per week for families of children aged from 6 months to the first eligible point of entry to the ECCE scheme, who are registered in an eligible childcare setting.

8 Changes to ECCE Programme capitation rates (standard: €69 and higher: €80.25) announced in Budget 2018 came into effect from September 2018.

9 Information about these strands is available on the website of the DCYA, via the following link: https://www.dcya.gov.ie/viewdoc.asp?fn=%2Fdocuments%2Fchildcare%2FCCSDocsJune2012%2F-CCSMainPage.htm&mn=chiz&nID=3

Two additional strands (CCSR and CCSRT, jointly referred to as CCSR(T)) are also part of CCS. Community Childcare Subvention Resettlement (CCSR) is available to programme refugees, and is designed to promote their integration into Irish society. Parents receive a subvention[10] to enable them to avail of childcare while they attend a language and orientation course within their reception centre for eight weeks and then for a full year following their move into the community (i.e. 60 weeks in total). Community Childcare Subvention Resettlement Transitional (CCSRT) provides access to free childcare for children of families experiencing homelessness. It provides subvention for all children aged 0 to 5 years inclusive and 6 to 12 year olds during the school holidays only.

Services need to have the CCSPlus contract in order to offer the universal subsidy or one of the resettlement strands. This contract also enables private services to offer the CCS programme. Community services can offer CCS if they have a CCS contract or CCSPlus contract. In this report, the information related to CCSPlus, CCSU and CCSR(T) contracts has been grouped together and is reported on jointly under the name CCSPlus while information on participating children, families and registrations is reported on separately.

CCS and CCSPlus payments are made based on four bands[11]. Table 2.2 shows the eligibility bands and weekly subvention rates for CCS and CCSPlus[12], while Table 2.3 specifies the universal subvention rates per session type.

Table 2.2 Eligibility bands and weekly subvention rates under CCS and CCSPlus in 2017/18

Service type[13]	Band A	Band AJ	Band B	Band D
CCS and CCSPlus Full day	€145	€80	€70	€50
CCS and CCSPlus Part-time	€80	€80	€35	€25
CCS and CCSPlus Sessional	€45	€45	€25	€17
CCS and CCSPlus Half session	€22.50	€22.50	€12.50	€8.50

Table 2.3 Maximum subvention rate by universal session type

Service type	Rate per week	Rate per day
CCS Universal full day	€20	€4
CCS Universal part-time	€10	€2
CCS Universal sessional	€7	€1.40
CCS Universal half session	€3.5	€0.70

Figure 2.2 presents the breakdown of CCS and CCSPlus uptake, by band, since 2015/16. There has been a gradual increase in the uptake under Band A, with inter-year alternations between bands AJ and B.

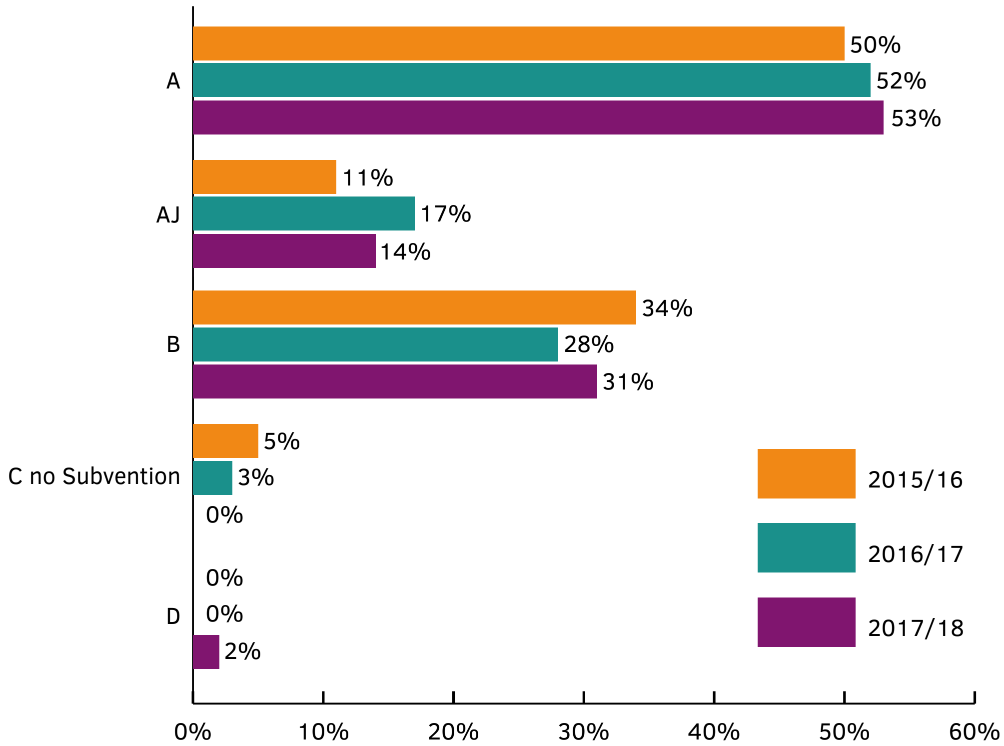
10 As with all subventions, payment is made directly to the childcare provider, rather than to the parent(s). A flat rate of €145 per week is payable for part-time childcare (up to 5 hours per day), over 4 days per week for each approved child for the eligible duration of their childcare place. A flat rate of €72.50 per week is payable for sessional childcare (2 hours 16 minutes to 3 hours 30 minutes) over 4 days per week.

11 Details of the bands' eligibility criteria are available at: http://affordablechildcare.ie/am-i-eligible-for-assistance-with-my-childcare-costs/

12 All subvention rates have increased since the previous year.

13 Service/placement types are: Full day-care places (more than 5 hours per day); Part-time places (between 3 hours 31 minutes and 5 hours per day); Sessional places (between 2 hours 16 minutes and 3 hours 30 minutes per day); and Half-session places (between 1 hour and 2 hours 15 minutes per day).

Figure 2.2 Percentage of CCS and CCSPlus registrations by band[14]



In 2017/18, **3,417 services were contracted to offer CCS and/or CCSPlus**, of which 32% (1,081) were community facilities and 68% (2,336) were private services (all private services had only the CCSPlus contract). Of the 1,081 community facilities contracted, a higher proportion had the CCSPlus contract (97%) compared to CCS contract (83%). The greatest expansion has been among private providers with an increase of 186% (from 817 in 2016/17 to 2,336 in 2017/18).

The value of approved **CCS contracts in 2017/18 was €49,514,187**. The total value of approved **CCSPlus contracts** was higher at **€65,114,700**, as these also included CCSU and CCSR(T).

In 2017/18 (between September 2017 and June 2018), **36,367 children benefited** from the targeted CCS strands: **CCS and CCSPlus**. This is an increase of 47% on the previous year, when 24,715 children were supported under CCS and CCSP[15]. An additional **37,393 children availed of the universal subsidy (CCSU)** and a further 444 children were supported under CCSRT.

Almost two thirds of services (65% or 2,188), who had CCSPlus contracts, had at least one child registered under CCSU.

In 2017/18, the number of parents benefiting from either CCS, CCSPlus, CCSU or CCSR(T) stood at 61,888.

Table 2.4 presents the number of registrations for different strands by provider type. Almost two thirds of registrations approved under CCS and CCSPlus (64%) were made in community services. The majority of registrations for CCSU were held by private services (83%).

14 Band C was not funded in 2017/18, but was awarded to registrations with a start date after the snap-shot window closed that did not request an exemption (0-12 month exemption/TEC exemption). This status is normally used for registrations that are replacing CCS funded children that have left a service during the programme call.

15 In 2016/2017, CCSP abbreviation was used to indicate the CCS programme delivered in private services.

Table 2.4 Number of registrations under CCS programmes by organisation type

Programme strand	Community	Community %	Private	Private %	**Total**
CCS and CCSPlus	25,833	64%	14,840	36%	**40,673**
CCSU	7,126	17%	35,461	83%	**42,587**
CCSR(T)	262	49%	268	51%	**530**

Table 2.5 presents a breakdown of CCS and CCSPlus registrations by county. Counties with larger population centres tended to have the highest numbers of registrations, with Dublin (18%), and Cork (7%) recording the first and third largest shares of CCS and CCSPlus registrations nationally. Donegal is a surprising outlier recording 7% of registrations under CCS and CCSPlus. In comparison, according to Census 2016, 3.4% of all children aged up to 12 years live in Donegal.

There are significant differences in the distribution of CCS and CCSPlus registrations at county level. The proportion of CCS registrations in all CCS/CCSPlus registrations ranges from 11% in Kildare to 74% in Leitrim, with Westmeath (58%) and Dublin (56%) also having high proportions of CCS registrations, relative to CCSPlus. These differences usually reflect, at least in part, the proportions of community and private childcare services in each county, as outlined in Section 3.2.

Table 2.5 Number and percentage of CCS and CCSPlus registrations and number of CCSU registrations by county

County	CCS	CCS (%)	CCSPlus	CCSPlus (%)	**Total CCS and CCSPlus**	**CCSU**
Carlow	570	48%	607	52%	1,177	437
Cavan	436	44%	557	56%	993	723
Clare	562	51%	550	49%	1,112	969
Cork City	735	68%	344	32%	1,079	1,020
Cork County	700	43%	920	57%	1,620	3,778
Donegal	576	21%	2,158	79%	2,734	910
Dublin – Dublin City	3,023	67%	1,457	33%	4,480	5,505
Dún Laoghaire-Rathdown	203	55%	168	45%	371	3,216
Dublin – Fingal	170	19%	748	81%	918	3,404
Dublin – South Dublin	801	46%	946	54%	1,747	2,865
Galway	853	38%	1,384	62%	2,237	2,796
Kerry	980	51%	943	49%	1,923	965
Kildare	74	11%	621	89%	695	2,174
Kilkenny	605	55%	499	45%	1,104	780
Laois	397	33%	819	67%	1,216	500
Leitrim	379	74%	135	26%	514	243
Limerick	1,108	48%	1,215	52%	2,323	1,547
Longford	380	52%	348	48%	728	250
Louth	507	45%	621	55%	1,128	959
Mayo	568	51%	540	49%	1,108	558
Meath	411	39%	633	61%	1,044	1,718

Table 2.5 Number and percentage of CCS and CCSPlus registrations and number of CCSU registrations by county *contd*.

County	CCS	CCS (%)	CCSPlus	CCSPlus (%)	**Total CCS and CCSPlus**	**CCSU**
Monaghan	620	36%	1,083	64%	1,703	733
Offaly	129	31%	289	69%	418	409
Roscommon	187	29%	451	71%	638	507
Sligo	530	41%	748	59%	1,278	724
Tipperary	418	24%	1,323	76%	1,741	1,312
Waterford	685	49%	717	51%	1,402	687
Westmeath	504	58%	365	42%	869	616
Wexford	643	38%	1,028	62%	1,671	1,087
Wicklow	222	32%	480	68%	702	1,195
Total	**17,976**	**44%**	**22,697**	**56%**	**40,673**	**42,587**

2.4 Training and Employment Childcare (TEC)[16]

TEC is an overarching childcare programme, specifically designed to support parents on eligible training and education courses as well as certain categories of parents returning to work, by providing subsidised childcare places. The TEC Programme also provides childcare support for families on Family Income Support (ASCC). It comprises three strands:

1. **Childcare Education and Training Support Programme** (CETS) provides childcare to training course participants on courses provided by the Local Education and Training Boards (ETBs, formerly FÁS and Vocational Education Committees) and secondary schools.
2. **After-School Child Care Programme** (ASCC) is administered by Pobal on behalf of the Department of Employment Affairs and Social Protection (DEASP) and provides after-school care for primary school children for certain categories of working parents and parents on DEASP employment programmes (excluding Community Employment).
3. **Community Employment Childcare Programme** (CEC) is administered by Pobal on behalf of the Department of Employment Affairs and Social Protection (DEASP) and provides childcare for children of parents who are participating in the Community Employment scheme. There are two strands within CEC, namely CEC(PS) (pre-school) and CEC(AS) (after-school).

In 2017/18, **1,659 services were contracted to offer at least one strand of TEC**, which represents 37% of all services (4,543, see Section 3.1). The number of services offering TEC grew by 5% since 2016/17 (1,587 services offered TEC that year). Over two thirds of these services (68%) were private and 32% were community. These proportions are similar to those in the previous year.

Of all services contracted to provide at least one TEC Programme, almost all offered

16 Information about these programmes is available on the DCYA website, via the following link: https://www.dcya.gov.ie/viewdoc.asp?fn=%2Fdocuments%2Fchildcare%2FCCSDocsJune2012%2F-CCSMainPage.htm&mn=chiz&nID=3

CETS (97%). The other strands of TEC were offered by approximately three quarters of services, specifically: CEC (AS) 74% (1,220); CEC (PS) 72% (1,194); and ASCC 73% (1,213). Table 2.6 presents a breakdown of providers by TEC strands and organisation type.

Table 2.6 Number and percentage of services contracted to offer TEC

	Community		Private		All services		
Programme strand	Number	%	Number	%	2016/17	2017/18	%
ASCC	372	31%	841	69%	1,198	1,213	**73%**
CEC (AS)	423	35%	797	65%	1,190	1,220	**74%**
CEC (PS)	435	36%	759	64%	1,198	1,194	**72%**
CETS	522	32%	1,085	68%	1,549	1,607	**97%**
Total offering at least one strand	**538**	**32%**	**1,128**	**68%**	**1,587**	**1,659**	**100%**

In 2017/18, **3,049 parents/guardians benefited from TEC programmes** – a 24% decrease on the previous year. A total of **4,421 children participated in TEC**, which represented a decline of 25% (1,510) since 2016/17. Just over half of all TEC registrations were for children availing of CETS (51%), while the smallest proportion of children benefitted from ASCC (7%) – see Table 2.7 for details. Similar to last year, the highest decline in the number of registrations (27%) was recorded for CETS, from 3,841 last year to 2,788 in 2017/18. These declines are most likely associated with a reduction in demand for TEC placements as the economic situation in the country improves and people move from training programmes and government funded employment schemes towards employment in the open labour market.

Table 2.7 presents the number and percentage of TEC registrations at county level. The share of registrations for different strands of TEC varies significantly between counties, ranging from 0% to 18% for ASCC and from 2% to 39% for CEC strands. In all but six counties, CETS registrations have the highest share in all TEC registrations[17] and in 16 (out of 31) counties, at least half of registrations are for CETS.

17 Roscommon is included among these 24 CCC areas, although an equal proportion (39%) of services there offer CEC (AS) and CETS.

Table 2.7 Number and percentage of TEC Programme registrations by county

County	ASCC	ASCC	CEC (AS)	CEC (AS)	CEC (PS)	CEC (PS)	CETS	CETS	Total TEC registrations
Carlow	0	0%	22	34%	11	17%	32	49%	65
Cavan	10	9%	24	21%	23	21%	55	49%	112
Clare	6	4%	44	31%	23	16%	68	48%	141
Cork	20	10%	18	9%	31	16%	131	66%	200
Cork City	6	10%	12	19%	22	35%	23	37%	63
Donegal	13	5%	47	16%	39	14%	189	66%	288
Dublin – Dublin City	13	4%	25	8%	98	30%	191	58%	327
Dublin – Dún Laoghaire-Rathdown	6	14%	1	2%	10	23%	26	60%	43
Dublin – Fingal	36	10%	26	7%	30	9%	256	74%	348
Dublin – South Dublin	31	10%	26	8%	37	12%	213	69%	307
Galway	19	8%	41	16%	32	13%	159	63%	251
Kerry	5	2%	71	33%	73	34%	64	30%	213
Kildare	12	4%	61	21%	40	14%	181	62%	294
Kilkenny	13	11%	23	19%	19	16%	63	53%	118
Laois	1	1%	33	22%	29	19%	86	58%	149
Leitrim	10	18%	20	36%	7	13%	18	33%	55
Limerick	12	6%	50	25%	30	15%	109	54%	201
Longford	11	10%	35	31%	39	34%	29	25%	114
Louth	19	8%	75	32%	78	34%	59	26%	231
Mayo	9	10%	34	37%	32	35%	16	18%	91
Meath	17	6%	75	28%	31	11%	147	54%	270
Monaghan	4	2%	83	37%	86	38%	54	24%	227
Offaly	13	15%	18	21%	22	26%	33	38%	86
Roscommon	9	8%	44	39%	17	15%	44	39%	114
Sligo	19	15%	30	23%	15	12%	66	51%	130
Tipperary	11	6%	27	15%	45	26%	93	53%	176
Waterford	5	2%	38	17%	35	16%	145	65%	223
Westmeath	34	13%	83	32%	55	21%	91	35%	263
Wexford	19	9%	52	24%	64	29%	85	39%	220
Wicklow	5	5%	14	14%	22	21%	62	60%	103
Total	**388**	**7%**	**1,152**	**21%**	**1,095**	**20%**	**2,788**	**51%**	**5,423**

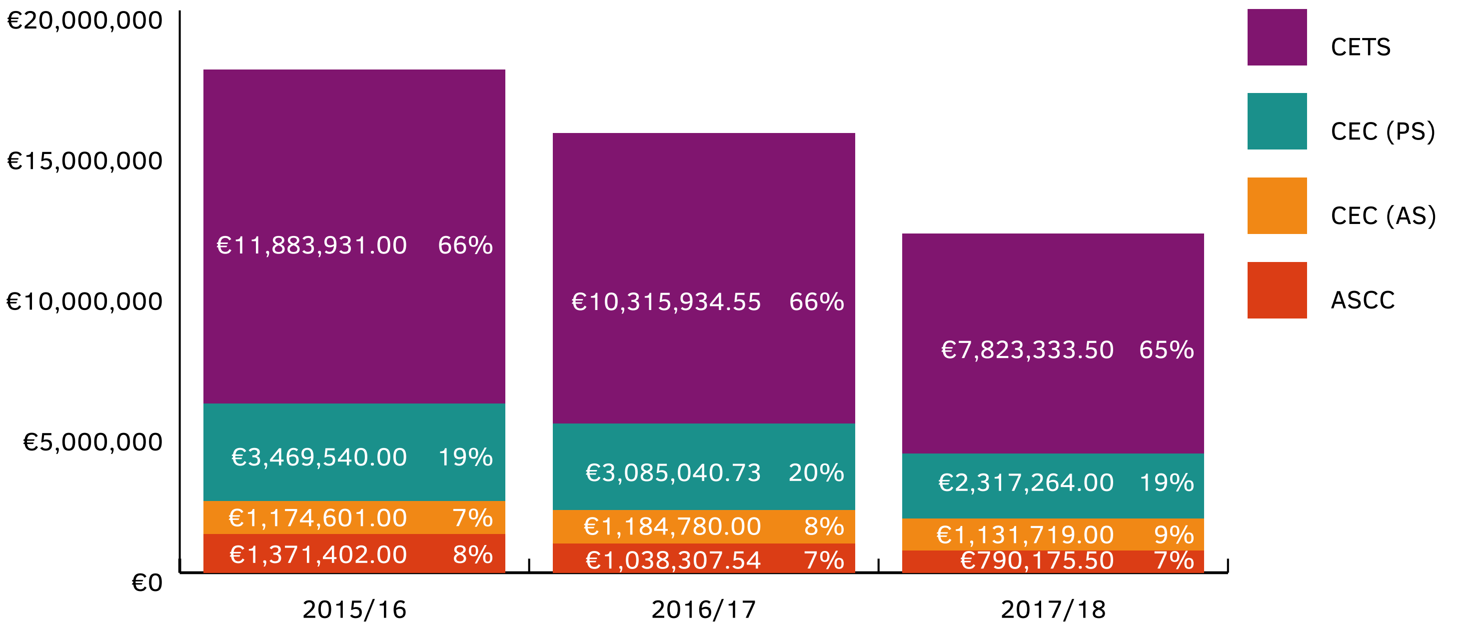
The total **value of approved TEC contracts** in 2017/18 was **€12,062,492**. This represents a decline of 23% relative to the previous programme year and reflects the decline in the number of children availing of the programme.

The average subventions (per unique child) were as follows: ASCC €2,258; CEC (AS)

€1,385; CEC (PS) €2,816; and CETS €3,163. An average rate of TEC subvention per child was €2,728, an increase of 4% on the previous year.

While the total value of investment has fallen since 2015/16, the overall proportional breakdown of TEC funding across its various strands has remained largely the same, as shown in Figure 2.3.

Figure 2.3 TEC funding by programme strand

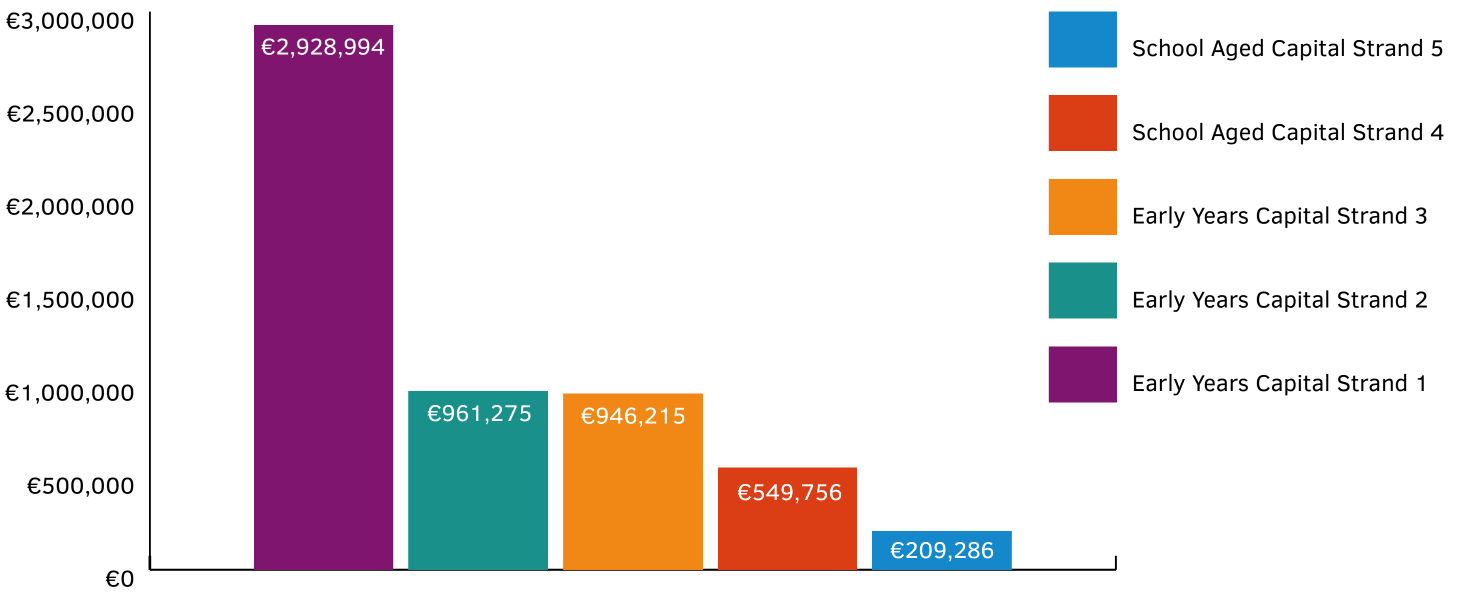


2.5 Early Years Capital and School Age Childcare (EYC and SAC)

As outlined in Section 1.2.2, capital funding is provided by the DCYA to support infrastructural improvements to childcare facilities.

in 2018, 343 contracts to a total value of €5,595,526 were signed with service providers under EYC and SAC. The majority (52%) of the funds were provided under EYC Strand 1, as shown in Figure 2.4.

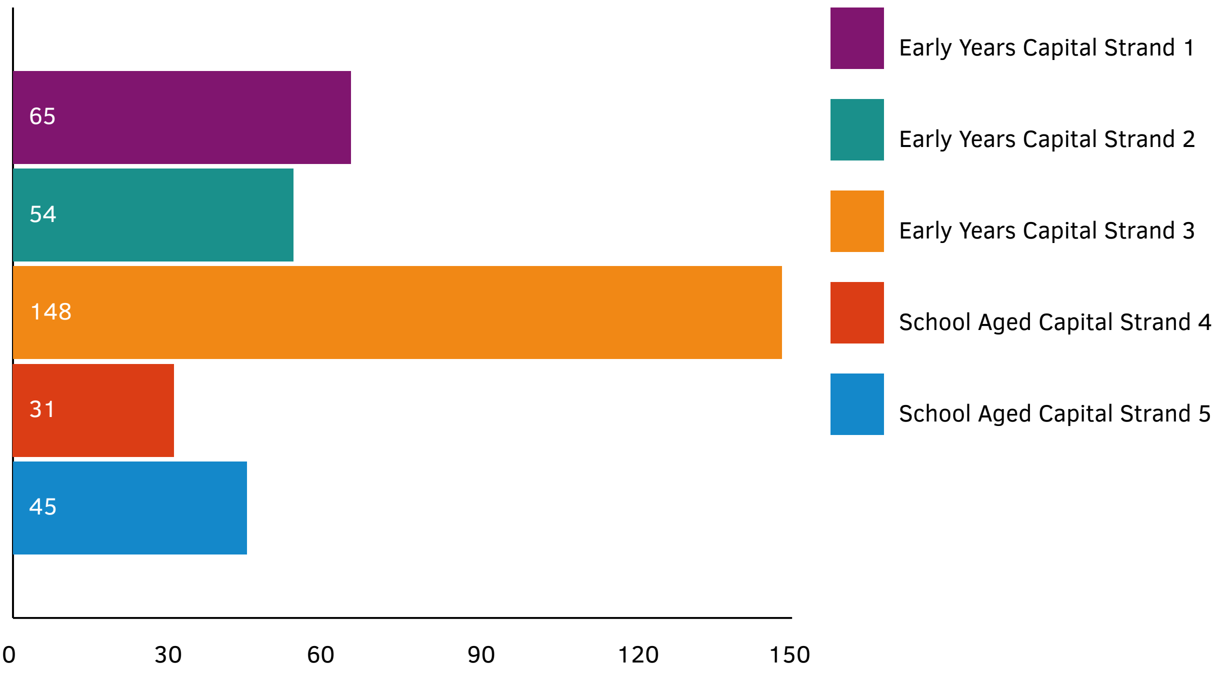
Figure 2.4 Allocations of EYC and SAC funds by strand



As Figure 2.5 illustrates, 148 (43%) of contracts were with services availing of funding under EYC Strand 3. EYC (Strands 1-3) projects accounted for 78% of contracts and 86% of funds allocated, with SAC projects (Strands 4-5) accounting for the balance – 22% of contracts and 14% of funding.

A total of 290 services benefited from the allocations made in 2018.

Figure 2.5 Number of EYC and SAC contracts signed by type of contract



2.6 Access and Inclusion Model (AIM)

The Access and Inclusion Model (AIM) is a model of supports designed to ensure that children with disabilities can access the ECCE programme. Its goal is to empower service providers to deliver an inclusive pre-school experience, ensuring that every eligible child can fully participate in ECCE, and benefit from the high quality early years care and education. AIM is a child-centred model, involving seven levels of progressive support, moving from the universal to the targeted, based on the needs of each child. AIM seeks to offer tailored, practical supports based on need, and does not require a formal diagnosis of disability[18]. AIM provides a suite of universal and targeted supports across seven levels, as shown in Figure 2.6.

Figure 2.6 Model to support access to the ECCE for children with a disability

18 Information about AIM (Access and Inclusion Model) is available at the following link: http://aim.gov.ie/ (Department of Children and Youth Affairs, Department of Education and Skills and Department of Health).

Levels 1 – 3 include universal supports for childcare settings and parents, ranging from training for childcare staff to information resources for parents. These supports are delivered through CCCs, a consortium led by Mary Immaculate College, the DCYA and Better Start. Targeted therapeutic supports (Level 6) are delivered by the HSE. Levels 4, 5 and 7 are provided to childcare settings by Pobal and Better Start.

Apart from Level 7, AIM supports are delivered all year round, and are not tied to a particular programme year. The data provided here represents a snapshot taken on 19th June 2018 and capture applications with a planned start date on or after 28th August 2017. Level 7 data relates to applications made under the ECCE 2017/18 programme call, as at 19th June 2018.

In 2017/18, **1,715 services were supported under the Access and Inclusion Model, in respect of 3,179 children**. Relative to the previous year, there was a 34% increase in services receiving support under AIM and an increase of 28% in the number of children receiving support.

In 2017/18, 1,667 services received Level 4 supports where early years specialists provided on-site mentoring to ECCE service providers and supported both services and parents to access additional resources, where necessary. 240 services received Level 5 supports, which comprises access to specialist equipment (227 services received specialist equipment) and/or funding for alterations to buildings (38 services received funding for alterations to buildings). There is a separate application process for Level 5 funding and the same service can receive funding for both equipment and alterations.

In 2017/18, 1,615 services were in receipt of Level 7 supports, which provides funding for staff for an additional 10 or 15 hours a week. This is to enable services to reduce the staff to child ratio in an ECCE setting and there is flexibility around how services decide to do this (e.g. by employing an additional staff member or reducing the number of children registered for ECCE in a room). The number of services receiving Level 7 support more than doubled (134% increase) compared to last year, when 689 services were assisted. It should be noted that 449 services in receipt of Level 7 support had a child entering their second year of ECCE, and would therefore, be in their second year of receiving support for the same child. The vast majority of approved Level 7 applications (94%) were for 15 hours a week.

Table 2.8 shows the number of services in receipt of support at Levels 4, 5 and 7 broken down by county[19].

19 Some services received funding for both Level 5 alterations and Level 5 equipment and some services have received funding for only one of these categories. Some services received Level 5 funding but did not receive funding under Levels 4 or 7. Therefore, the totals for each column from Level 4 through to Level 7 do not correspond.

Table 2.8 Number of services providing AIM by county and level

County	Level 4	Level 5 Alterations	Level 5 Equipment	Level 7	Number of services receiving AIM support by county	% of services in each county in receipt of AIM support	% of services in each county in receipt of AIM Level 7 support
Carlow	26	0	3	22	26	52%	44%
Cavan	25	1	7	25	26	43%	41%
Clare	50	5	10	45	51	39%	35%
Cork City	44	0	7	44	46	58%	56%
Cork County	174	9	37	181	180	50%	50%
Donegal	67	4	11	61	67	49%	45%
Dublin – Dublin City	121	1	9	115	126	33%	30%
Dublin – Dún Laoghaire-Rathdown	45	0	7	47	48	26%	26%
Dublin - Fingal	105	1	6	99	108	35%	32%
Dublin – South Dublin	88	1	8	93	93	41%	41%
Galway	91	1	9	93	92	37%	37%
Kerry	68	0	9	64	69	55%	51%
Kildare	81	0	10	69	83	43%	36%
Kilkenny	32	0	5	35	34	36%	37%
Laois	37	2	6	36	38	50%	47%
Leitrim	13	1	2	15	13	46%	54%
Limerick	83	1	17	74	85	50%	43%
Longford	12	0	0	10	12	36%	30%
Louth	49	0	5	48	50	44%	42%
Mayo	63	2	14	57	65	54%	47%
Meath	81	3	9	66	82	42%	34%
Monaghan	19	0	2	16	19	33%	28%
Offaly	26	1	5	28	27	38%	39%
Roscommon	21	1	3	22	22	42%	42%
Sligo	16	1	6	17	17	27%	27%
Tipperary	64	1	10	66	67	44%	43%
Waterford	26	0	2	26	28	31%	29%
Westmeath	30	0	0	27	30	38%	35%
Wexford	63	2	4	66	64	48%	49%
Wicklow	47	0	4	48	47	30%	30%
Total	**1,667**	**38**	**227**	**1,615**	**1,715**	**41%**	**39%**

In 2017/18, **3,069 children received Level 4 support**, which represents an increase of 27% on the previous year. 2,389 children from this cohort progressed to also receive Level 7 support. With an additional 620 children accessing Level 7 supports for their second year in ECCE, **the total number of children accessing Level 7 supports in 2017/18 was 3,009**. They represented 2% of all children availing of ECCE. In comparison, in 2016/17, 1% of children accessing ECCE received AIM Level 7 support.

2.7 Programmes – summary

Over the entire programme year, **185,580** children participated in at least one DCYA funded programme (ECCE, CCS (including CCSU and CCSPlus) or TEC) (181,123 between September 2017 and June 2018). This represents a 24% increase on the previous year. While the increase in 2016/17 was largely due to a higher number of children availing of ECCE, the increase in 2017/18 has been driven by the extension of CCS/CCSPlus and specifically the roll-out of CCSU. The significant increase in the number of children due to these two factors offset the small decrease in the number of children participating in ECCE and notable decline in TEC numbers. Table 2.9 presents the changes over the last three years for each programme in regard to the number of children supported, number of registrations and funding levels for the period between September 2017 and June 2018 (please note that detailed analysis in this chapter were based on figures for this period). Table 2.10 presents the same figures but for the entire programme year 2017/18.

The growth in the number of registrations and participating children is associated with increased investment in the early years sector. For the period September 2017 to June 2018, the value of registrations amounted to €363,691,841.

Table 2.9 Number of children, registrations and approved registration value for ECCE, CCS/CCSPlus, CCSU and TEC from September 2017 to June 2018

				Change 2016/17 to 2017/18	
	Programme	2016/17	2017/18	Actual	Percentage
Number of children	ECCE	120,601	118,673	- 1,928	-2%
	CCS/CCSPlus	24,715	36,367	11,652	47%
	CCSU	N/a*	37,393	N/a*	N/a*
	TEC	5,931	4,421	- 1,510	-25%
	Total children	**147,514**	**181,123**	**33,609**	**23%**
Number of Registrations	ECCE	127,637	125,794	- 1,843	-1%
	CCS/CCSPlus	25,530	40,673	15,143	59%
	CCSU	N/a*	42,587	N/a*	N/a*
	TEC	7,344	5,423	- 1,921	-26%
	Total registrations	**160,511**	**214,477**	**11,379**	**7%**
Approved Registration Value	ECCE	€244,860,861	€241,957,446	-€2,903,415	-1%
	CCS/CCSPlus	€38,870,494	€91,902,008	€53,031,514	136%
	CCSU	N/a*	€18,287,062.40	N/a*	N/a*
	TEC	€15,600,764	€11,545,325	-€4,055,439	-26%
	Total registration value	**€299,332,118**	**€363,691,841**	**€64,359,724**	**22%**

*CCSU is a new programme and therefore, there is no comparative data from previous years.

Table 2.10 Number of children, registrations and approved contract value for ECCE, CCS/CCSPlus, CCSU and TEC for the entire programme year 2017/18

	Programme	2014/15	2015/16	2016/17	2017/18	Annual difference 2016/17 & 2017/18
Number of children	ECCE	66,761	74,108	120,821	118,899	-1,922
	CCS/ CCSPlus	23,716	25,832	27,150	38,846	11,696
	CCSU*	N/a	N/a	N/a	39,319	N/a
	TEC	6,814	7,068	6,350	4,655	-1695
	Total	**N/a**	**N/a**	**149,426**	**185,580**	**36,154**
Number of registrations	ECCE	68,333	77,414	128,299	126,431	-1,868
	CCS/ CCSPlus	23,775	26,374	29,156	47,666	18,510
	CCSU*	N/a	N/a	N/a	46,106	N/a
	TEC	8,171	9,277	8,320	6,011	-2309
	Total	**N/a**	**N/a**	**165,775**	**226,214**	**60,439**
Approved registration value	ECCE	€138,959,130	€178,054,067	€273,753,848	242,015,900	-31,737,948
	CCS/ CCSPlus	€39,700,820.00	€39,675,222.00	€42,639,511.00	€92,459,722.90	€49,820,211.90
	CCSU*	N/a	N/a	N/a	€18,439,956.30	N/a
	TEC	€18,416,268.00	€18,676,285.00	€16,822,504.00	€11,817,424.50	-5,005,080
	Total	**N/a**	**N/a**	**€333,215,863.00**	**€364,733,003.70**	**€31,517,140.70**

3

Profile of early years services

Profile of early years services

4,543

services offered at least one of the DCYA early years programmes of which

74% are private

66% in urban areas

94%

of early years services have an outdoor play area on their premises

Fewer services are offering afternoon sessional care (down from 38% to 29%)

84%

of services implement Aistear curriculum

74%

follow Síolta quality standards

31%

of services paid average rates of

€3,949

3.1 Introduction

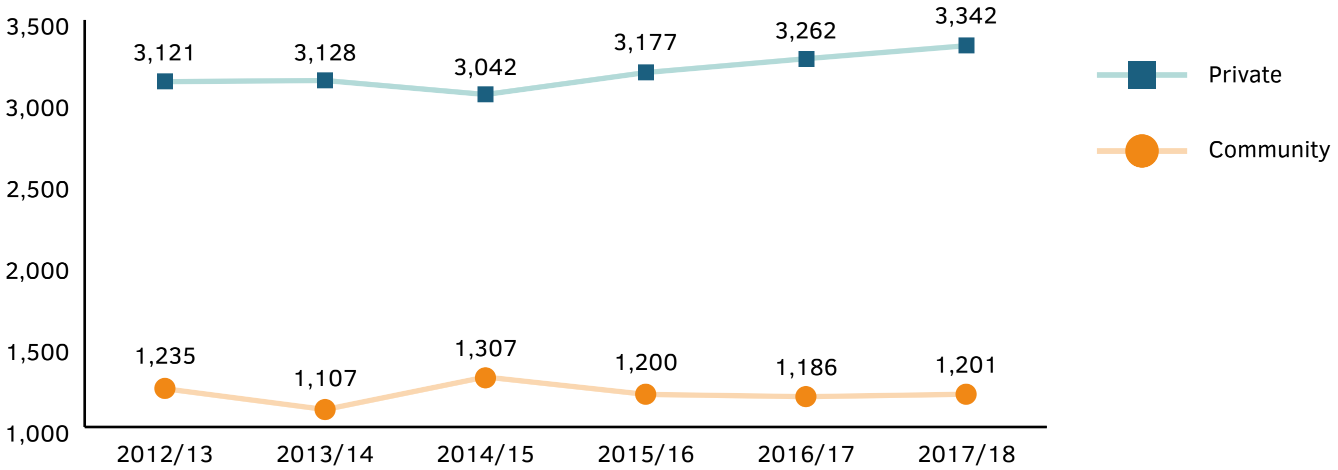
This chapter provides an overview of the main characteristics of early years services. These include the type of service, geographical location, participation in funding programmes, range of childcare provision, premises ownership, location of premises and liability for commercial rates. The two data sources underlying the analysis in this chapter are the Programmes Implementation Platform (PIP), which includes all registered services, and the service profile survey completed by 88% of services.

In 2017/18, 4,543 services were contracted to provide at least one of three early years programmes, namely Early Childhood Care and Education (ECCE), Community Childcare Subvention (including CCS, CCSU, CCSPlus and CCSR(T)) and/or Training and Employment Childcare (TEC). Compared to 2016/17, 95 more services (2%) delivered these programmes. This represents the same annual increase that occurred between 2015/16 and 2016/17.

3.2 Types of service and geographical distribution

In Ireland, the majority of early years services are operated by private organisations. In 2017/18 private services accounted for 74% (3,342) of all services contracted to provide at least one of the three early years programmes, with community services accounting for the remaining 26% (1,201). Over recent years, there has been a slight increase in the number of private services while the number of community services has remained relatively constant, as shown in Figure 3.1.

Figure 3.1 Number of childcare services by organisation type, 2012/13 – 2017/18



Two thirds of services (66% or 2,979[20]) were located in urban areas and 34% (1,538) in rural areas. Table 3.1 shows the overall urban/rural distribution of community and private childcare facilities over the last three years. There has been a decline in the proportion of services located in rural areas, from 39% in 2015/16 to 34% in 2017/18. Services in urban areas are more likely to be private with 77% of urban services being private, compared to 67%[21] in rural areas.

20 26 services could not be geo-coded and do not have an urban/rural classification.

21 There are 1,538 facilities in rural areas, of which 1,034 are private and 504 are community services. There are 2,979 services in urban areas, of which 2,288 are private and 691 are community providers.

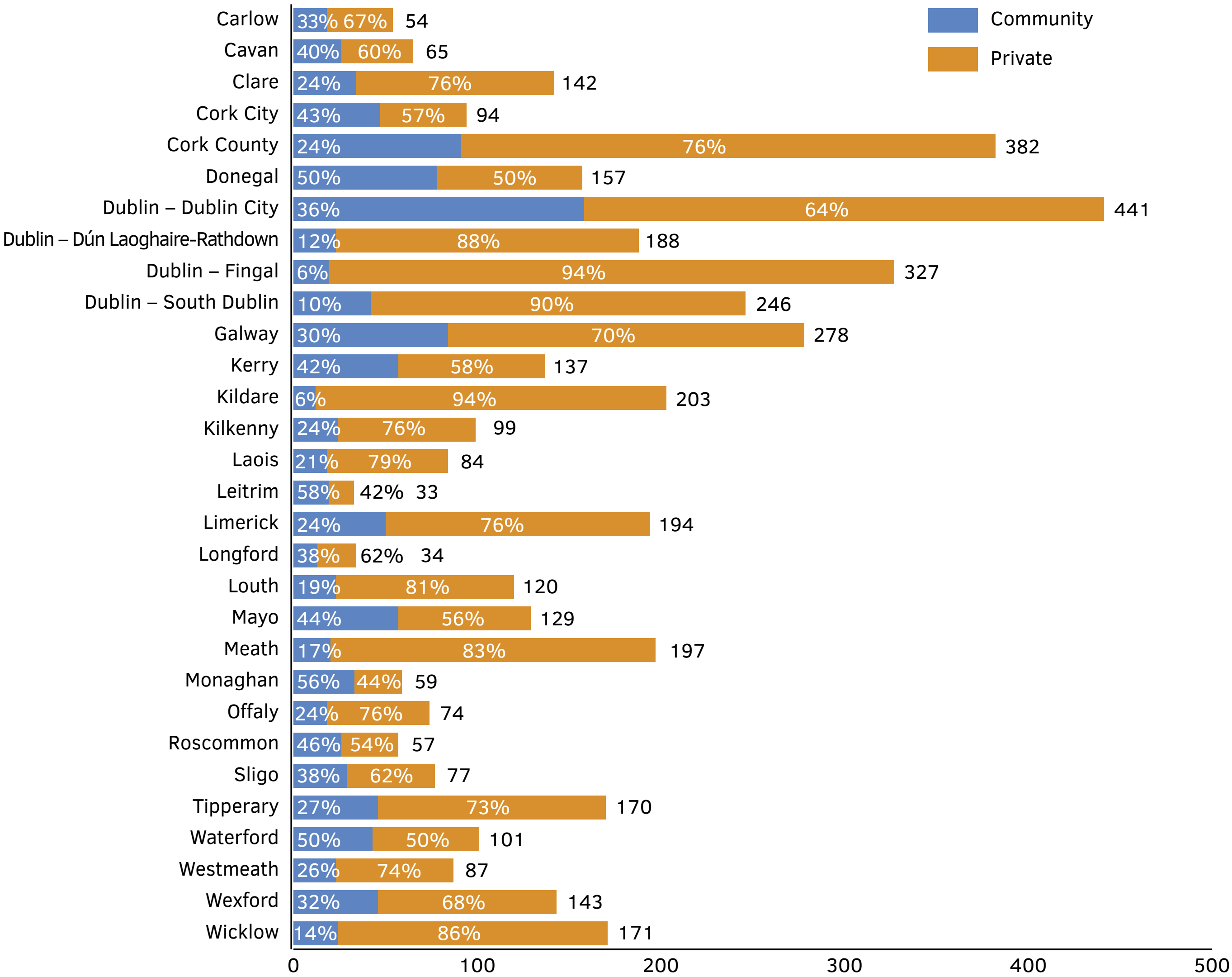
Table 3.1 Percentage of services by organisation type and urban/rural

	2015/16		2016/17		2017/18*	
	Urban	Rural	Urban	Rural	Urban	Rural
All services	61%	39%	60%	40%	66%	34%
Private	64%	36%	63%	37%	69%	31%
Community	52%	48%	52%	48%	58%	42%

*26 services could not be geo-coded and do not have an urban/rural classification.

Figure 3.2 presents the county breakdown of services by organisation type. The ratio of community to private service providers varies significantly between counties. Similar to 2016/17, the counties with the highest proportions of community services (in excess of 50%) are in the Border Region (Leitrim, Monaghan and Donegal) and in Cork City. The counties with the lowest proportions of community services are generally in Dublin and the Mid-Eastern Region: Dublin – Fingal (6%), Kildare (6%), Meath (10%), Dublin – Dún Laoghaire-Rathdown (12%), Wicklow (14%), Dublin – South Dublin (17%), and Louth (19%). This geographical pattern is similar to that recorded in 2016/17.

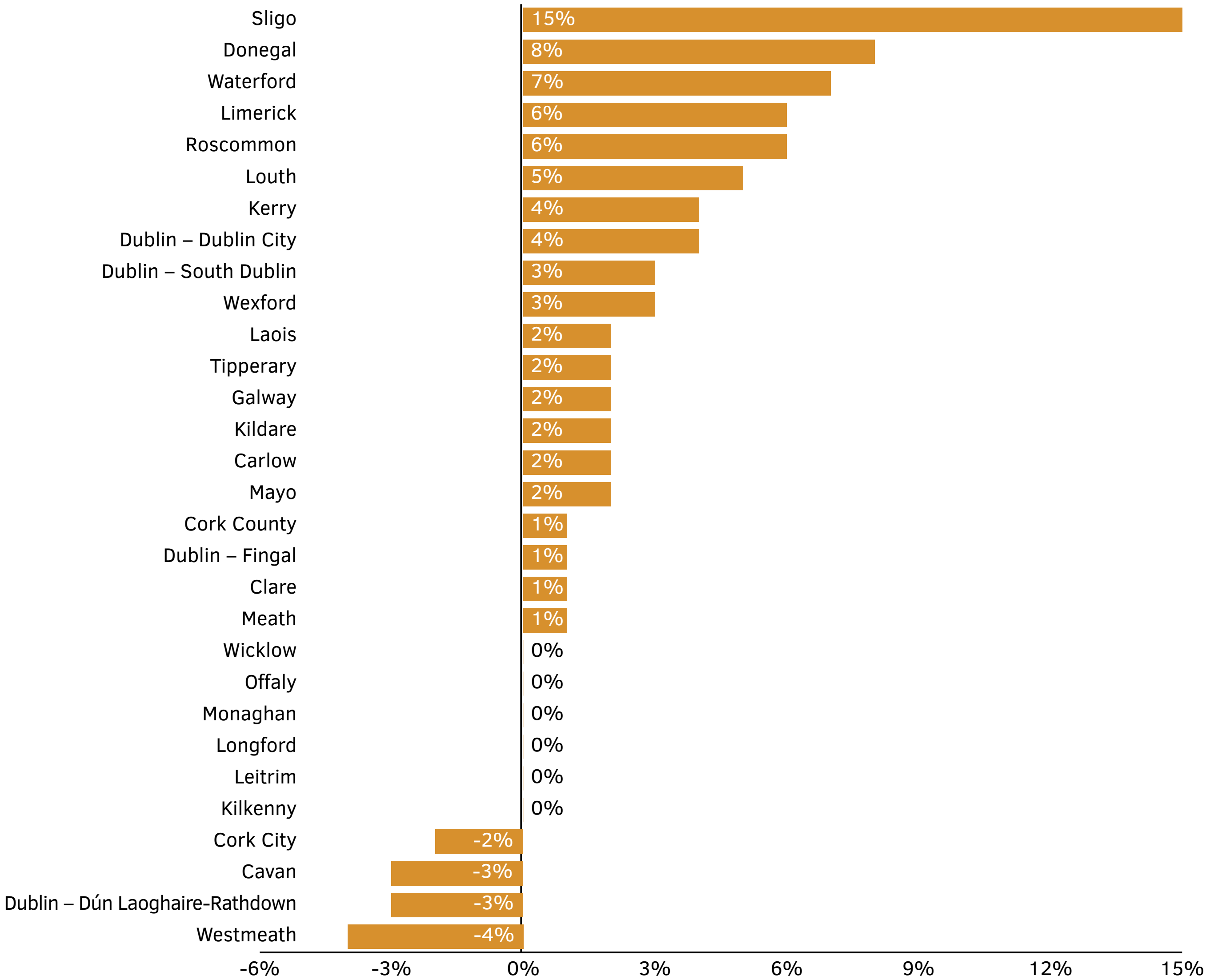
Figure 3.2 Number of services by county and percentage by organisation type



As noted in the chapter introduction, there has been an overall increase of 2% in the number of services nationally compared to the previous year. Figure 3.3 presents the changes in the number of services at county level between 2016/17 and 2017/18. The highest growth in the number of services was recorded in Sligo (15%), with ten additional services opening there and bringing the total to 77. As Sligo had only 88 places available (3% of children enrolled) at the time of the survey, this growth in the number of services would suggest that the local market is responding to the very low availability. The number of services in Donegal increased by 8%, while in Limerick and Waterford increases of 6% and 7% were recorded, respectively. In the four Dublin local authority areas, 20 new services opened in total, of which 15 are located in Dublin City.

The following counties/local authority areas experienced a decline in the number of services: Westmeath (4), Dublin – Dún Laoghaire-Rathdown (6), Cavan (2) and Cork City (2). In six counties[22], the number of services remained the same.

Figure 3.3 Percentage change in the number of childcare services by county from 2016/17 to 2017/18



22 Kilkenny, Leitrim, Longford, Monaghan, Offaly and Wicklow.

3.3 Funding programmes

Early years services can be contracted to offer up to three funding programmes in a given programme year. ECCE has the highest level of uptake, with 93% of services offering it. The proportion of services providing ECCE is slightly lower than in recent years (96% in 2016/17 and 95% in 2015/16). With 37% of services offering TEC, the proportion is in line with previous years – 36% in 2016/17 and 2015/16. The greatest change has been in respect of CCS, with 75% of services offering either CCS or CCSPlus or both, compared to 39% in 2016/17. This increase is associated with the expansion of CCS/CCSPlus and the introduction of CCSU[23] (as discussed in more detail in Chapter 2).

Table 3.2 provides a breakdown of services by funding programme in 2017/18 and by organisation type. A higher proportion of private services offer ECCE (96%) compared to 86% of community services, while community services are more likely to offer CCS and TEC.

Table 3.2 Number and percentage of services by funding programme

Funding programme	Community	Community % (1,201)	Private	Private % (3,342)	Total number of services	% of all services participating (4,543)
ECCE	1,031	86%	3,211	96%	4,242	**93%**
CCS & CCSPlus	1,081	90%	2,336	70%	3,417	**75%**
TEC	538	45%	1,121	34%	1,659	**37%**

3.4 Types of childcare

This section is based on analysis of data from the service profile survey. Services were asked about the type of service provided. The most common type of service offered is sessional a.m., with 89% of services offering this type of care. Compared to 2016/17, the proportion of services offering different service types remains very similar (all are within 1% of last year's figures), with the exception of sessional care. There were 3% less services offering sessional a.m. care, yet the most noticeable drop was in the share of services offering sessional p.m. care from 38% in 2016/17 to 29% in 2017/18. The likely cause of this decrease is a smaller demand for ECCE places due to lower numbers of eligible children combined with parents' preference for morning sessions. For a detailed breakdown of provision by service type offered, see Figure 3.4.

23 The CCSPlus contract entitles services to offer CCSPlus, CCSU and CCSRT.

Figure 3.4 Number and percentage of services by service type offered

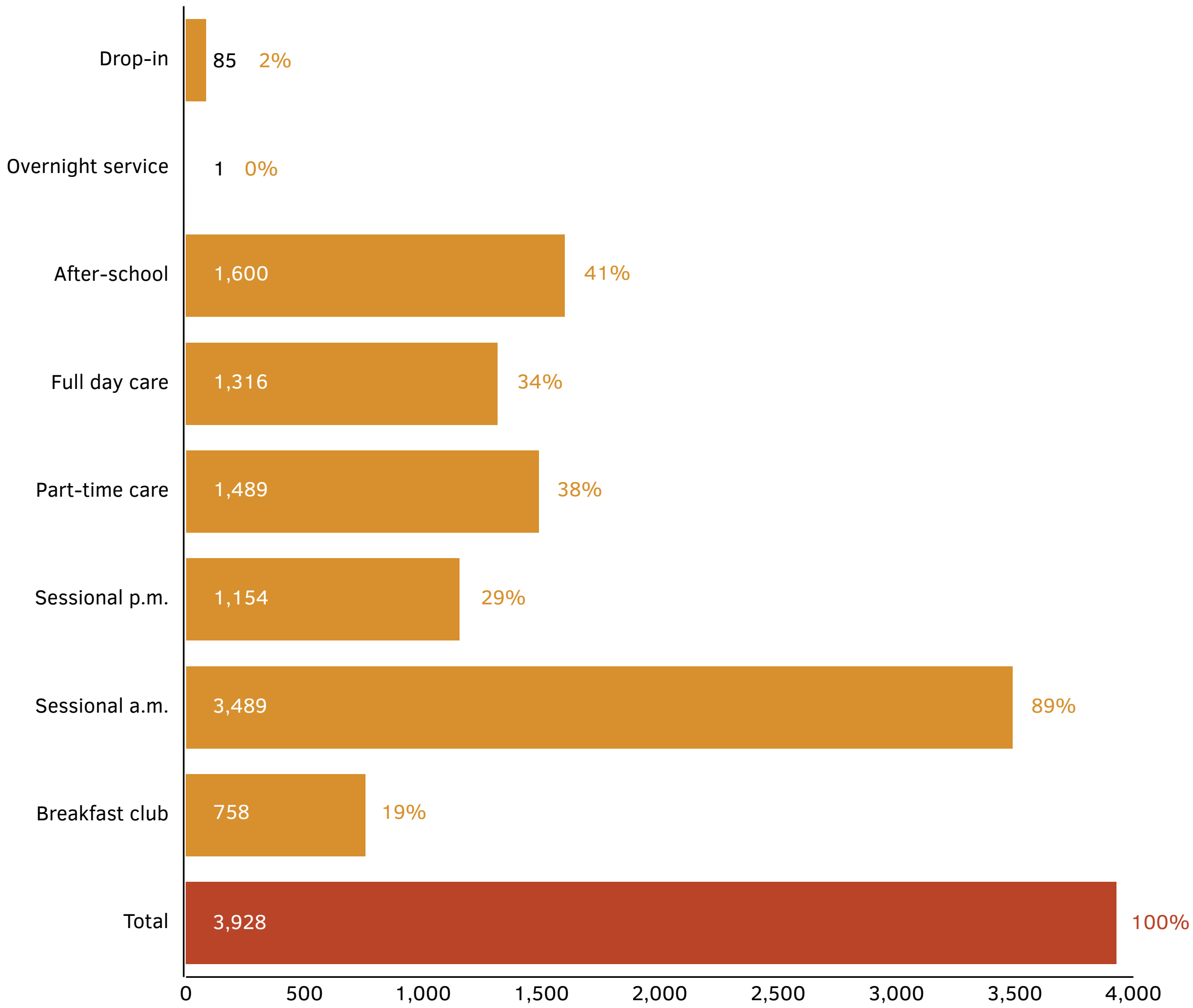


Table 3.3 shows the changes over time in the type of service offered. Sessional services remain the single most commonly offered form of childcare. There has been growth, over time, in the provision of breakfast clubs and after-school care, while the levels of provision in respect of other forms of childcare have remained fairly constant.

Table 3.3 Percentage of services by service type offered between 2013 and 2017/18

Service type	2013/14	2014/15	2015/16	2016/17	2017/18
Full day care	30%	31%	34%	33%	**34%**
Breakfast club	12%	14%	18%	19%	**19%**
After-school	30%	34%	54%	41%	**41%**
Sessional	100%	97%	96%	93%	**91%**
Part-time care	31%	32%	40%	39%	**38%**
Drop-in	3%	3%	6%	3%	**2%**

3.5 Premises ownership

The survey responses in respect of premises ownership reveal a similar profile to that recorded in 2016/17. Almost half of childcare providers (48%) own their premises, with a further 42% leasing them. The proportion of providers who own their premises is higher amongst private services (53%) than among community providers (35%), and is slightly higher in rural areas than in urban locations (difference of 3%).

The survey responses also indicate an increase from 8% in 2016/17 to 10% in 2017/18 in the proportion of premises for which there is no formal ownership agreement. This situation is more prevalent amongst community providers, with 17% of community services not having a formal agreement. By comparison, in 2016/17, 14% of community services had no formal agreement. For a detailed breakdown see Table 3.4.

Table 3.4 Percentage of services by premises ownership

Premises ownership	Community (1,068)	Private (2,860)	Urban (2,552)*	Rural (1,371)*	All (3,928)
Leased	48%	40%	44%	39%	**42%**
No formal agreement	17%	7%	9%	11%	**10%**
Owned	35%	53%	47%	50%	**48%**

*Five services could not be geo-coded and do not have an urban/rural classification.

3.6 Location of premises

There are notable differences between community and private providers in regard to the location of premises. While the majority of all services (55%) operate from privately owned premises, the corresponding figures are 70% for private providers and 14% for community providers. Half of all community services are located in a community facility[24], compared to 7% of private services. Also, more community services than private ones are based in schools, 17% and 13% respectively.

Services located in urban areas are more likely to operate from private premises (57%) compared to their rural counterparts (50%). On the other hand, 23% of services in rural areas are based at a community facility compared to 17% in urban areas. For the remaining premises locations, there are no major differences based on the urban or rural location of a service (for a detailed breakdown see Table 3.5).

24 Half (50%) of community services are in community facilities, with an additional 4% in parish halls, which can also be considered as community premises. Many sports facilities are also community owned.

Table 3.5 Percentage of services by premises location

Premises location	Community (1,068)	Private (2,860)	Urban (2,552)*	Rural (1,371)*	All (3,928)
Community facility	50%	7%	17%	23%	**19%**
Employer facilitated premises	1%	2%	1%	1%	**1%**
Other	12%	3%	6%	5%	**6%**
Parish hall	4%	3%	3%	5%	**3%**
Private premises	14%	70%	57%	50%	**55%**
School	17%	13%	13%	15%	**14%**
Sports facility	2%	2%	2%	1%	**2%**

*Five services could not be geo-coded and do not have an urban/rural classification.

3.7 Commercial rates

Almost one third of early years services (31%) who responded to the service profile survey, were charged commercial rates in 2017/18. Table 3.6 shows the percentage of services that have been billed for rates each year since 2013. In 2017/18, the proportion of services that were charged commercial rates increased by 2% on the previous year. However, the proportion of services charged for rates remains lower than 2014/15 and 2015/16.

Table 3.6 Percentage of services billed for rates between 2013 and 2017/18

	2013/14	2014/15	2015/16	2016/17	2017/18
% of services billed for rates	26%	35%	32%	29%	31%

There are differences in respect of the types of services that are billed for rates. As in previous years, private services providers and those in urban areas are more likely to be charged for commercial rates. A detailed breakdown is shown in Table 3.7.

Table 3.7 Percentage of services billed for commercial rates

Billed for rates	Community	Private	Urban*	Rural *	All
Yes	12%	39%	36%	22%	**31%**
No	88%	61%	64%	78%	**69%**
Total number of services	**1,068**	**2,860**	**2,552**	**1,371**	**3,928**

*Five services could not be geo-coded and do not have an urban/rural classification.

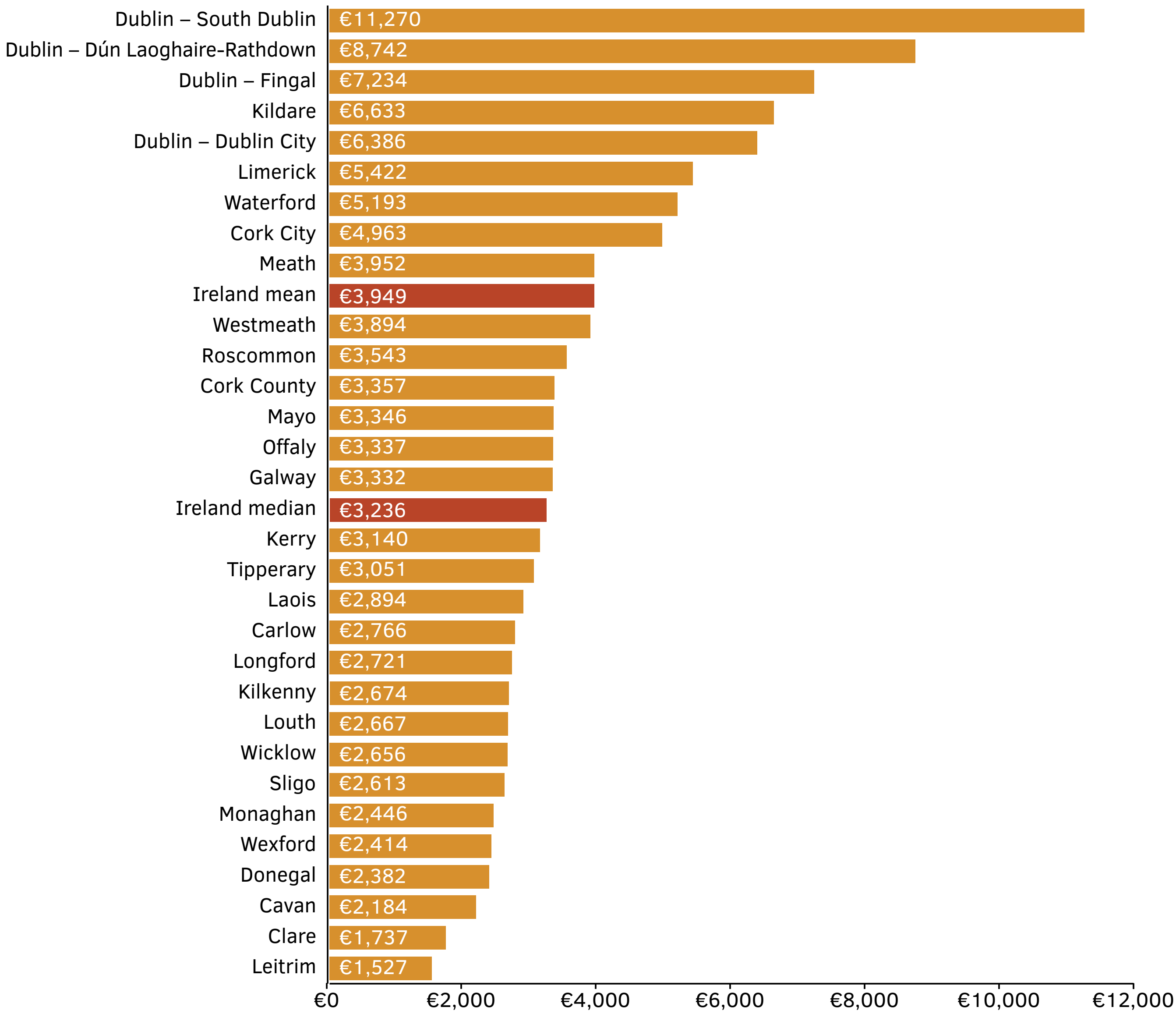
Nationally, the rates averaged at €3,949 in 2017/2018. This represents an increase of 14%, from €3,457 in 2016/17. Location is a factor in determining the level of rates childcare providers are charged, as rates are generally higher in urban locations than in rural areas. Local authorities have autonomy with respect to setting the levels of commercial rates[25], resulting in significant differences between counties.

25 The Department of Housing, Planning and Local Government states that "The levying and collection of rates are matters for each individual local authority. The Annual Rate on Valuation (ARV), which is applied to the valuation of each property, determined by the Valuation Office, to obtain the amount payable in rates, is decided by the elected members of each local authority in their annual budget and its determination is a reserved function of a local authority."
https://www.housing.gov.ie/local-government/administration/finance/local-government-finance

Figure 3.5 shows the average amounts of most recent commercial rates charged to early years services at county level. The highest rates were in the Dublin local authority areas (Dublin City, Fingal, Dún Laoghaire-Rathdown and South Dublin), Kildare, Meath and the local authority areas in the major cities – Cork, Limerick and Waterford (with the exception of Galway City). All these local authority areas and counties have rates levels that are above the national average. The lowest rates were charged in the Border Region (specifically in counties Leitrim, Cavan, Donegal, Monaghan and Sligo) and in Wexford and Clare.

Compared to last year, the amount of rates charged increased in the majority of local authority areas and/or counties (19), with decreases recorded for ten local authority areas. The highest increases took place in Waterford (90%), Longford (84%), Offaly (73%), Kildare (71%) and South Dublin (62%). The highest reductions were in Leitrim (54%), Wicklow (31%), Clare (22%), and Kerry (21%). The gap between the highest and lowest average rates at county level has expanded by 78%, from €5,482 in 2016/17 to €9,743 this year.

Figure 3.5 County average of most recent commercial rates bill



The level of rates charged varies depending on the type of provider and location. Table 3.8 shows the changes in commercial rates (by bands) over the last three years by organisation type. Almost three quarters of services (73%) were charged rates of €5,000 or below in 2017/18. Community services usually pay lower rates, with 44% paying less than €1,000, compared to only 19% of private providers. Over the last three years, the proportion of services paying higher rates (above €5,000) has increased by 5%.

Table 3.8 Rates bills (in bands) by organisation type

	Community			Private			All		
	2015/16	2016/17	2017/18	2015/16	2016/17	2017/18	2015/16	2016/17	2017/18
Under €1,000	45%	54%	44%	24%	22%	19%	27%	26%	**22%**
€1,000-€5,000	35%	29%	38%	52%	51%	53%	50%	49%	**51%**
€5,001-€10,000	13%	13%	9%	14%	16%	17%	14%	15%	**16%**
Over €10,000	5%	4%	9%	9%	11%	11%	8%	10%	**11%**
Did not specify	2%	n/a	n/a	1%	n/a	n/a	1%	n/a	**n/a**

3.8 Curriculum and quality standards

Early years services follow a number of different curricula approaches and quality standards. *Aistear*, the national Early Childhood Curriculum Framework, is the most widely applied, with 84% of services who completed the survey reporting its adoption. *Síolta* standards were used by 74% of services. Steady growth in the share of services adopting these two approaches has been observed over the last three years, with the share of *Aistear* adoption growing by 3% and the proportion of *Síolta* followers increasing by 6%.

Levels of uptake of other curricula approaches are similar to those reported for 2016/17– with the exception of the play-based curriculum, use of which continues to rise, from 43% in 2015/16, to 52% in 2016/17 and 59% this year. For the detailed breakdown, see Table 3.9.

The proportion of services applying *Aistear* and *Síolta* is broadly similar across community and private facilities and across rural and urban areas. However, services in rural areas are more likely to follow play-based curricula, while the Montessori approach is more prevalent among urban services (see Table 3.9).

Table 3.9 Percentage of services by curriculum approaches and quality framework

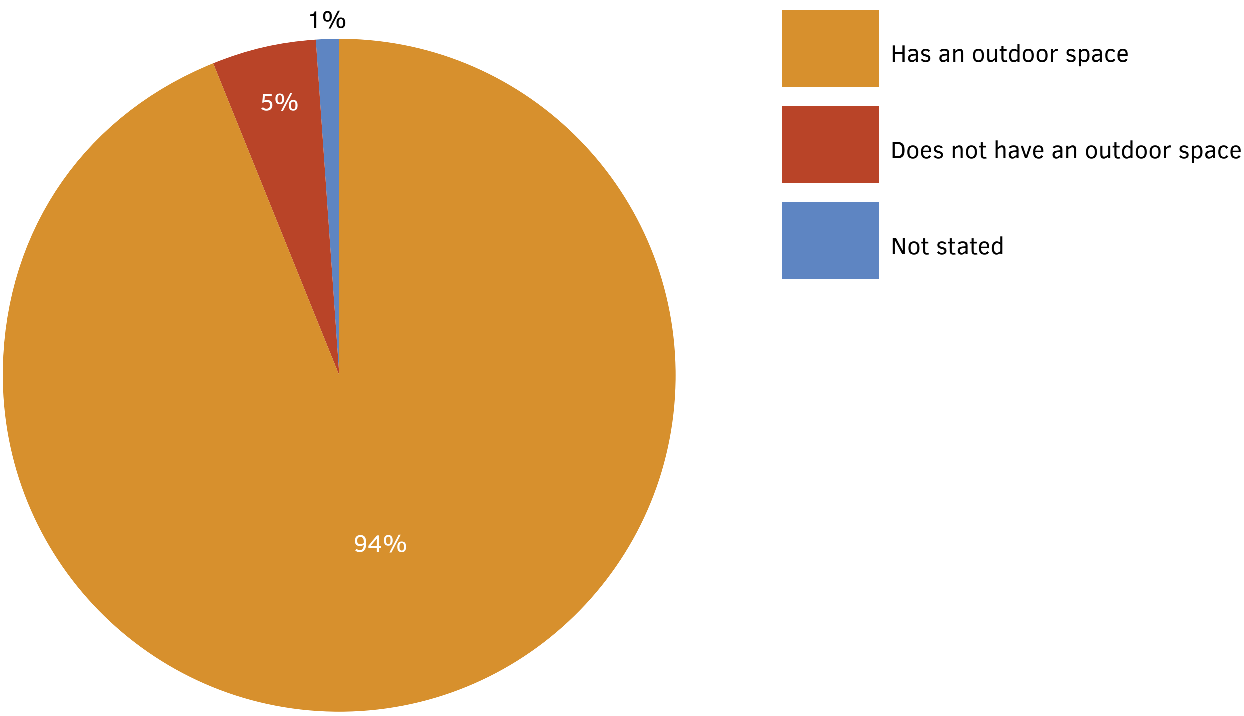
	Community	Private	Urban*	Rural *	Total
Aistear	84%	84%	84%	84%	**84%**
Síolta	76%	73%	74%	74%	**74%**
Play-based curriculum	59%	59%	58%	62%	**59%**
Montessori	11%	54%	45%	36%	**42%**
HighScope	19%	7%	10%	9%	**10%**
Naíonra	8%	5%	6%	5%	**6%**
Early Start	2%	3%	3%	2%	**3%**
Steiner	2%	1%	1%	2%	**1%**
ABA (ASD children)	0%	1%	1%	0%	**1%**
Froebel	1%	1%	1%	1%	**1%**
None	6%	2%	3%	3%	**3%**
Other	5%	3%	4%	3%	**3%**
Total	**1,068**	**2,860**	**2,552**	**1,371**	**3,928**

*Five services could not be geo-coded and do not have an urban/rural classification.

3.9 Outdoor spaces

This year's survey included a question that asked respondents if their services had an outdoor space on their premises. The vast majority of childcare services (94%) reported having an outdoor space, see Figure 3.6.

Figure 3.6 Percentage of services with an outdoor play area on their premises



4

Children in early years settings

Children in early years settings

20,977

one parents families have children attending early years services

13%

Neither English nor Irish was the first language for 13% of children enrolled

Estimated

3,080

Traveller children attended services

65%

of services have at least one child with a diagnosed disability enrolled, 8% more than last year

4.1 Introduction

In 2016, the Department of Children and Youth Affairs (DCYA) published the *Diversity, Equality and Inclusion Charter and Guidelines for Early Childhood Care and Education* (DCYA, 2016), which aims to support and empower those working in the sector to explore, understand and develop inclusive practices for the benefit of children, their families and wider society. The introduction of the guidelines, as well as the roll out of the Access and Inclusion Model (AIM) for children with disabilities, encourages early childhood care and education services to sign up to a National Inclusion Charter and to develop and implement an inclusion policy for their own setting.

This chapter looks specifically at equality, diversity and inclusion issues in relation to children attending early years services. It presents data on children who come from one parent families; those for whom English or Irish is not a first language; Traveller and Roma children; and those with disabilities. Respondents to the service profile survey were asked to provide information, to the best of their knowledge, on the numbers of children/families from these backgrounds.

4.2 Equality and Diversity

This section presents data on children from one parent families, children for whom English or Irish is not a first language, and Traveller and Roma children.

4.2.1 One parent families

Almost three quarters of survey respondents (2,875 services) reported having children attending who come from one parent families (see Table 4.1). This is down 4% on the previous year. In total, 20,977 one parent families were reported to be availing of childcare in services that responded to the service profile survey. Of these, almost half (47% or 9,868 one parent families) availed of ECCE. Just over half of one parent families (51%) availed of childcare from community services. Compared to last year, this proportion decreased by 7% and is likely to be associated with the growing number of children availing of the CCS programme in private services (CCSPlus) (see Section 2.3 for more details). A higher proportion of one parent families (81%) availed of childcare in services based in urban areas. This proportion increased by 7% (from 74% to 81%), compared to 2016/17.

Table 4.1 Number of early years services with children from one parent families

	Community	Private	Urban*	Rural*	All
Number of services with children from one parent families	907	1,968	1,984	888	**2,875**
% of services with one parent families	85%	69%	78%	65%	**73%**
Number of one parent families using early years services	10,597	10,380	17,042	3,931	**20,977**

*Three services (with children from four one parent families) could not be geo-coded and do not have an urban/rural classification

4.2.2 Children with neither English nor Irish as their first language

The survey responses reveal how early years childcare settings reflect the increasing diversity of Irish society, with linguistic diversity being one indicator thereof. The majority of services (69%) have at least one child attending for whom neither English nor Irish is a first language and in total they reported 21,939 children belonging to this target group. This represents 13% of all children enrolled (173,197) – the same proportion as in the previous year. 14,806 children from this group (67%) availed of ECCE, which is a significantly higher proportion than for children from other target groups.

The breakdown across community/private and urban/rural services, presented in Table 4.2, is broadly in line with last year's trends.

Table 4.2 Number of children attending an early years service for whom English nor Irish is a first language

	Community	Private	Urban*	Rural*	All
Number of services	768	1,938	2,050	653	**2,706**
% of services	72%	68%	80%	48%	**69%**
Number of children	6,578	15,361	19,513	2,422	**21,939**

*Three services (with four children for whom neither English nor Irish is a first language) could not be geo-coded and do not an urban/rural classification.

4.2.3 Traveller and Roma children

Irish Travellers and Roma represent two of the main ethnic minorities in Ireland (Commissioner for Human Rights, 2012; Daly, 2017). In the 2017/18 survey, 642 services reported having at least one Traveller child attending their services. This represents 16% of respondents, which is the same as the previous year.

According to the 2016 Census, there were 12,313 Irish Traveller children (aged 0 to 14 years), of whom 5,199 were aged between 0 and 6 years, resident in the State[26]. The survey data recorded 2,633 Traveller children enrolled in early years services. Based on extrapolation, it can be estimated that there were 3,080 Traveller children in early years services over 2017/18. This represents an increase of 8% from the 2016/17 programme year and shows that 25% of Traveller children, aged 0 to 14 years, were attending an early years service. Just under half of Traveller children in early years services availed of ECCE (47%).

The census does not record data for Roma as a discrete ethnic or cultural group[27]. Kennedy (2018), notes that the number of Roma residents in the State varies, and is usually estimated to be around 5,000. 276 services reported having at least one Roma child attending their facility (7% of all survey respondents). In total, 688 Roma children were enrolled in early years services, of whom just under two thirds

26 Roma are not enumerated separately.

27 The classifications used by the CSO in respect of ethnic and cultural backgrounds are: White Irish; White Irish Traveller; Any other White background; Black or Black Irish – African; Black or Black Irish - any other Black background; Asian or Asian Irish – Chinese; Asian or Asian Irish - any other Asian background and Other including mixed background

(65% or 444 children) availed of ECCE. When extrapolated, it can be estimated that there are 805 Roma children in early years services. This represents a decrease of 21% on the previous year, when it was estimated that 1,013 Roma children were availing of early years services[28].

Table 4.3 shows the breakdown of Traveller and Roma children in services by organisation type and location. The majority of Traveller children (69%) attend community services, while a similar proportion of Roma children (67%) are enrolled in private facilities. The vast majority of both Traveller and Roma children attend services based in urban areas, 87% and 89% respectively.

Table 4.3 Number of Traveller and Roma children in early years services

	Community	Private	Urban	Rural	All
Traveller children					
Number of services with any children attending	340	302	501	141	**642**
% of services with any children attending	32%	11%	20%	10%	**16%**
Number of children attending	1,815	818	2,287	346	**2,633**
% of children attending (as % of all Traveller children)	69%	31%	87%	13%	**100%**
Roma children					
Number of services with any children attending	91	185	241	35	**276**
% of services with any children attending	9%	6%	9%	3%	**7%**
Number of children attending	225	463	611	77	**688**
% of children attending (as % of all Roma children)	33%	67%	89%	11%	**100%**

4.3 Disability

4.3.1 Children with additional needs

Survey respondents were asked to specify the number of children attending their services with additional needs. The breakdown by organisation type is presented in Table 4.4. Three quarters of services reported having at least one child with additional needs[29]. In total, services reported 11,636 children with additional needs attending their services in 2017/18. These children represented 7% of all children enrolled.

Table 4.4 Breakdown of services and children with additional needs attending early years services

	Community		Private		All	
	Services	Children	Services	Children	Services	Children
Number of services/children with additional needs	886	4,581	2,063	7,055	**2,949**	**11,636**
Percentage of services/children	83%	39%**	72%	61%**	**75%**	**7%***

* Calculated as % of all children enrolled in early years services (173,197 children)

**Calculated as % of all children with additional needs (11,636 children)

28 Data quality issues were identified in regard to numbers of Roma children reported. While all efforts were made to verify the data where possible, this figure may not fully reflect the actual situation.

29 This includes children with diagnosed and undiagnosed additional needs.

4.3.2 Children with diagnosed disability

Survey respondents were also asked to provide further data on children with additional needs who had a diagnosis from the HSE. The majority of services (65% or 2,540) have at least one child with a diagnosed disability, a higher proportion than the previous year (57%). Community services are more likely to cater for children with a diagnosed disability, with almost three quarters of all community services having at least one child attending (73%) compared to 62% of private services.

Services were asked to provide a breakdown of children from this cohort against a prescribed list of disability categories (as diagnosed by the HSE). Children with multiple disabilities (e.g. a child with a physical disability and a learning disability) could be counted under all applicable categories.

Table 4.5 presents the breakdown of services and children by type of diagnosed disability and by organisation type.

Table 4.5 Breakdown of services and children with a diagnosed disability attending early years services

Number of services and children with:	Community		Private		All	
	Services	Children	Services	Children	Services	Children
Physical Disability	267	444	507	661	**774**	**1,105**
Sensory Impairment	337	601	628	937	**965**	**1,538**
Learning Disability	588	1,897	1,265	2,776	**1,853**	**4,673**
Other Disability	354	1,058	731	1,424	**1,085**	**2,482**
More than one need	497	1,178	1,022	1,845	**1,519**	**3,023**

4.3.3 Wheelchair access

The survey responses reveal that 77% of premises are wheelchair accessible. This figure is similar to that recorded in 2016/17 (78%), as is the breakdown between community and private services, 85% and 74% respectively. Geographically, there are variations, with the share of services with wheelchair access being higher in urban areas (74%) than in rural areas (38%). The percentage of wheelchair accessible premises ranges from below 70% in all of the Dublin local authority areas to over 85% in counties Carlow, Leitrim, Mayo, Roscommon, Cavan, Monaghan, Offaly and Westmeath. The percentage of provider owned premises that are wheelchair accessible is 5% lower than for leased premises (for details see Table 4.6).

Table 4.6 Wheelchair accessibility by premises ownership

Ownership type	No. of wheelchair accessible premises	Total no. of premises	% of wheelchair accessible premises
Leased	1,330	1,672	80%
No formal agreement	291	377	77%
Owned	1,411	1,879	75%
All ownership types	3,032	3,928	77%

Private premises and parish halls have the lowest proportions of wheelchair accessible premises, while the premises with the highest levels of wheelchair accessibility are community facilities, schools and employer facilitated premises (see Table 4.7).

Table 4.7 Wheelchair accessibility by premises location

Location	No. of wheelchair accessible premises	Total no. of premises	% of wheelchair accessible premises
Community facility	635	741	86%
Employer facilitated premises	47	55	85%
Other	177	223	79%
Parish hall	106	142	75%
Private premises	1,539	2,146	72%
School	471	550	86%
Sports facility	57	71	80%
All locations	3,032	3,928	77%

4.3.4 Inclusion policy and training

There has been an increase in the proportion of providers who reported having an inclusion policy in place, from 91% in 2016/17 to 95% in 2017/18.

In 2016/17, almost one third of services had a staff member who, in the previous twelve months, had completed the ‘Equality, Diversity and Inclusion Training Programme’ that was rolled out by the City/County Childcare Committees (CCCs) under AIM. In 2017/18, this figure increased to 63%, as shown in Table 4.8. The completion rate is slightly higher among community providers (65%) than among private providers (63%) and among rural services (67%) compared to urban ones (62%). There are considerable differences across counties, with the lowest completion rate recorded in Dublin City (46%) and the highest in Monaghan (85%).

Table 4.8 Completion rates of inclusion training

	Community		Private		Urban		Rural		All	
Services with staff who completed inclusion training	Number	%	Number	%	Number	%	Number	%	Number	%
Yes	695	65%	1,796	63%	1,570	62%	919	67%	2,491	**63%**
No	373	35%	1,064	37%	982	38%	452	33%	1,437	**37%**
Total services	**1,068**		**2,860**		**2,552**		**1,371**		**3,928**	

5

Childcare places

Childcare places

202,633

The estimated number of children enrolled across early years services, 9% increase on the previous year

The existing national capacity would cater for

213,654

children

31% Decrease in the number of vacant places

Estimated **11,021** vacant places

The number of children on waiting lists decreased by 15%

59%

of children enrolled are aged between 3 and 5 years

The average number of children enrolled per service is

44

5.1 Introduction

In the service profile survey, childcare services were asked to provide information on the number of children enrolled, those on waiting lists, as well as information on vacant places in their facility at the time of the survey. This information was sought by age cohort and service type. This chapter presents the reported figures and analysis of trends in relation to all children enrolled in services, vacant places and children on waiting lists. The chapter concludes with an analysis of capacity issues.

In 2017/18, services reported a total of **173,197 children enrolled** in early years services and **9,420 vacant places** across Ireland. Table 5.1 presents the number of children enrolled and on a waiting list, as well as the number of vacant places by age cohort. Pre-school children (those aged 3+ to 5 years) represent the largest cohort of children attending childcare services, accounting for 59% of all children enrolled. A county level breakdown of this data is presented in Appendix I.

Table 5.1 Number of children (by age) enrolled, on a waiting list and vacant places

Age range	Enrolled	Vacant places	Waiting list
Up to 1 year (0-12 months)	3,109	313	1,799
1 year+ to 2 years (13-24 months)	10,275	487	2,537
2 years+ to 3 years (25-36 months)	18,049	1,232	2,977
3 years+ to 4 years (37-48 months)	54,837	2,905	3,927
4 years+ to 5 years (49-60 months)	47,454	1,639	1,698
5 years+ to 6 years (61-72 months)	14,183	1,196	648
6 years+ to 8 years (73-96 months)	13,036	834	589
8 years+	12,254	814	383
Total	**173,197**	**9,420**	**14,558**

The figures for children enrolled, on waiting lists and vacant places by service type are presented in Table 5.2. The total number of children enrolled reported by services by service type was 194,456. The total is greater than the number of children enrolled by age, as some children avail of more than one service type. Sessional childcare represents the single most common service type, accounting for 47% of children enrolled.

Table 5.2 Number of children (by service type) enrolled, on a waiting list and by vacant places

Service type	Enrolled	Vacant places	Waiting list
Sessional	91,671	7,638	6,312
Full day care	35,466	2,514	5,495
After-school	34,810	3,225	2,268
Part-time care	23,317	2,512	3,879
Breakfast club	8,612	2,053	392
Drop-in	579	171	27
Overnight service	1	0	0
Total	**194,456**	**18,113**	**18,373**

Table 5.3 presents the number and percentage of services and the age groups they cater for. Almost all childcare services cater for children aged 3+ to 5 years (96%). This is expected as children in this age group are the largest cohort attending services. The smallest share of facilities (19%) offer care for babies.

Table 5.3 Number and percentage of services catering for different age ranges by organisation type

Children by age	Community	Community %	Private	Private %	All	% of all services
Up to 1 year (0-12 months)	214	29%	533	71%	747	**19%**
1 year+ to 2 years (13-24 months)	338	30%	793	70%	1,131	**29%**
2 years+ to 3 years (25-36 months)	576	29%	1,434	71%	2,010	**51%**
3 years+ to 4 years (37-48 months)	944	26%	2,714	74%	3,658	**93%**
4 years+ to 5 years (49-60 months)	894	26%	2,523	74%	3,417	**87%**
5 years+ to 6 years (61-72 months)	607	30%	1,417	70%	2,024	**52%**
6 years+ to 8 years (73-96 months)	478	34%	929	66%	1,407	**36%**
8 years+	456	37%	791	63%	1,247	**32%**
Total services	**1,068**	**29%**	**2,860**	**71%**	**3,928**	**100%**

5.2 Enrolments

Respondents were asked to report on the number of children enrolled in their service by age and service type. Service types include sessional (a.m. or p.m.), full day care, after-school, part-time care, breakfast clubs, drop-in and overnight services. As noted earlier, one child can attend more than one service type, e.g. a child may be attending a breakfast club before school and availing of after-school childcare in the afternoons. To assess the actual number of individual children and to avoid potential double counting, survey respondents were asked to provide the number of children by age. The analysis in this chapter is mainly based on the number of children by age, unless otherwise stated.

Survey respondents reported a total of **173,197** children enrolled by age and **194,456** children enrolled by service type. Based on extrapolation (factoring for non-respondents), **it was estimated** that there were **approximately 202,633 children enrolled** across all services at the time of the survey. This represents an increase of 9% on 2016/17 and it is the same level of increase as recorded last year. In 2017/18, the average number of children in services that completed the survey was 44, and remained the same as in the previous year. In 2016/17, the increase in the number of children enrolled was primarily driven by the extension of ECCE for the second year. However, in 2017/18, the number of children availing of ECCE decreased slightly (see Section 2.2). The increase can instead be linked to the increase in the number of school aged children and to a lesser degree, those aged 1+ to 3 years. For a detailed breakdown of the changes in the number of children by age between 2016/17 and this year, see Table 5.4.

Table 5.4 Number of children enrolled by age, 2016/17 and 2017/18

Age range	Survey data		Extrapolated		Based on extrapolated data	
	2016/17	2017/18	2016/17	2017/18	Change	% Change
Up to 1 year (0-12 months)	2,982	3,109	3,542	3,637	95	3%
1 year+ to 2 years (13-24 months)	9,138	10,275	10,854	12,021	1,167	11%
2 years+ to 3 years (25-36 months)	16,169	18,049	19,206	21,117	1,911	10%
3 years+ to 4 years (37-48 months)	52,573	54,837	62,448	64,157	1,709	3%
4 years+ to 5 years (49-60 months)	43,561	47,454	51,743	55,519	3,776	7%
5 years+ to 6 years (61-72 months)	11,986	14,183	14,237	16,593	2,356	17%
6 years+ to 8 years (73-96 months)	11,007	13,036	13,075	15,252	2,177	17%
8 years+	9,331	12,254	11,084	14,337	3,253	29%
Total	**156,747**	**173,197**	**186,190**	**202,633**	**16,443**	**9%**

Figure 5.1 shows the breakdown of children enrolled across the different age cohorts in 2017/18, while Figure 5.2 compares the age breakdown of children enrolled over the last two years. As in 2016/17, children aged 3+ to 4 years account for the single largest cohort (32%) among those attending early years services, with those aged 4+ to 5 years accounting for a further 27%. This is a slight decrease on corresponding figures last year, at 34% and 28%, respectively. Children aged 5 years and upwards account for 23% of attendees – an increase of 2% on the previous year. Meanwhile, those aged 3 years or less represent 18% of those attending early years services which is the same proportion as in 2016/17.

Figure 5.1 Number and percentage of children enrolled by age range

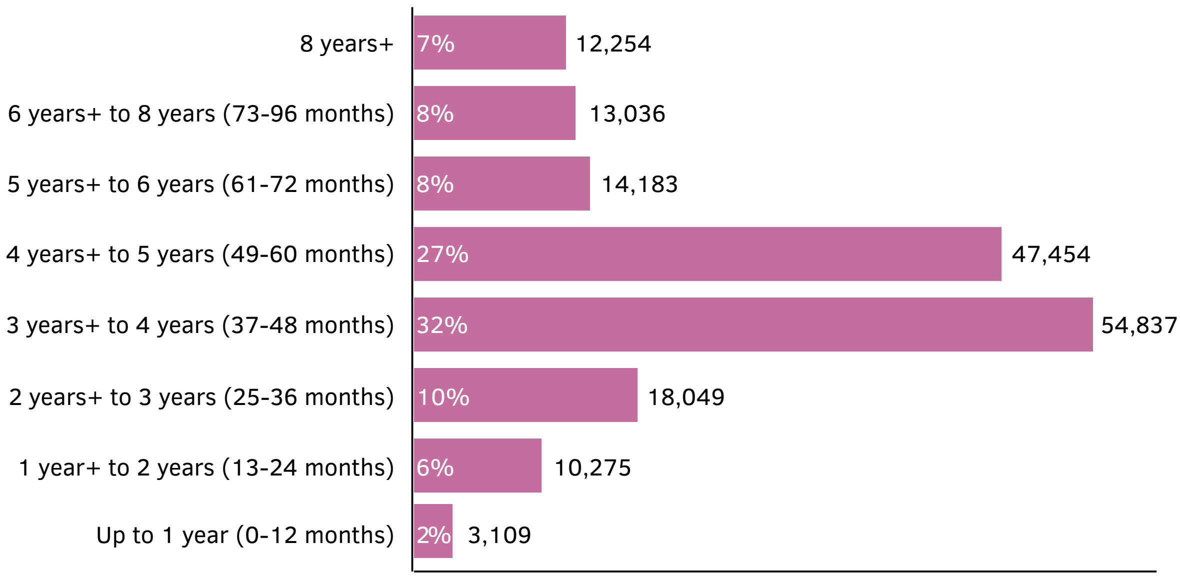


Figure 5.2 Percentage breakdown by age range of the children enrolled in childcare facilities in 2016/17 and 2017/18

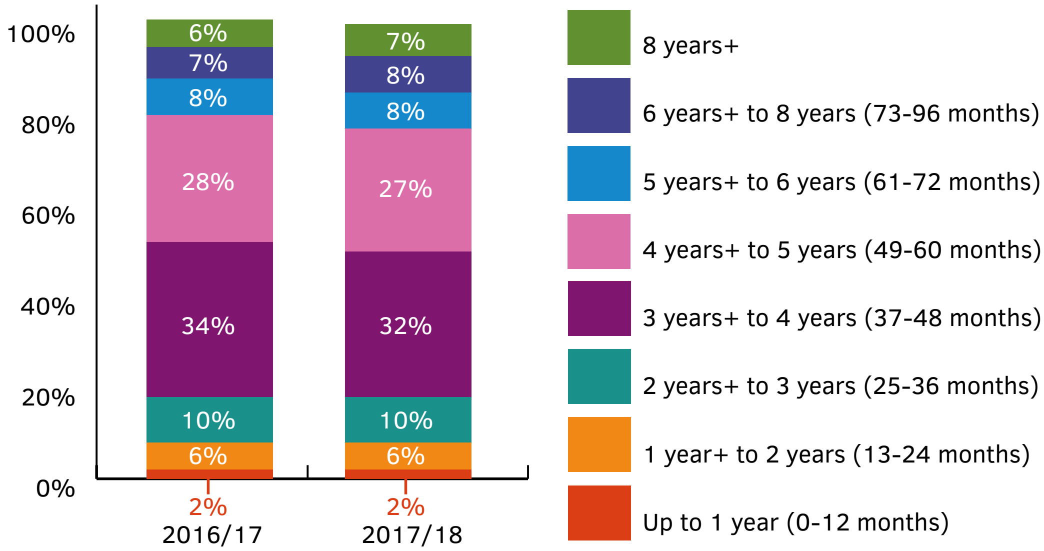


Table 5.5 provides a breakdown of children enrolled in early years services by their stage of childhood: babies, toddlers, pre-schoolers and school age children. Over two thirds of those enrolled (67%) are pre-schoolers. This is associated with a very high uptake of ECCE, with 118,673 children availing of the programme this programme year. Toddlers are the second largest group, accounting for 16% of children enrolled. Babies continue to represent the smallest cohort among those in childcare settings, at 2%. The availability of maternity leave (for 26 weeks) and the recent introduction of paternity leave[30] is likely to be the primary driver of low number of babies in childcare services relative to older children. However, to a certain extent, the lower number of babies enrolled may also be associated with a lack of supply of places for babies, as presented in Table 5.3.

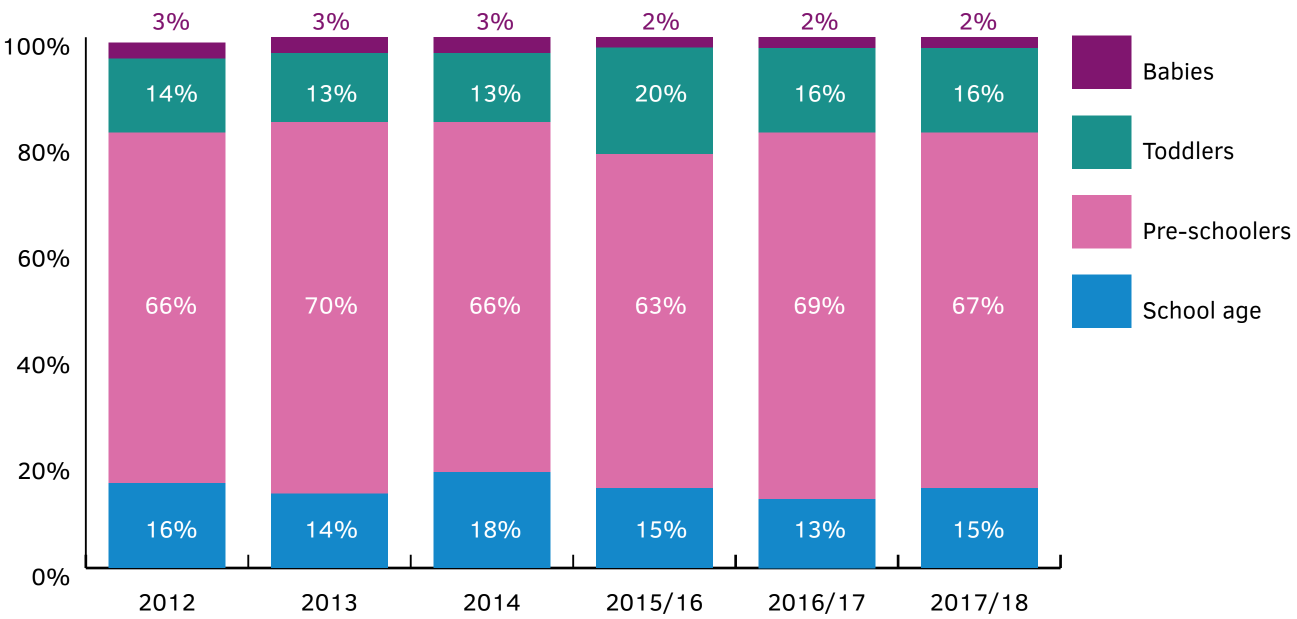
Table 5.5 Number and percentage of children enrolled by stage in childhood

Stage in childhood	Age range	Number	% of those enrolled
Babies	Up to 1 year (0-12 months)	3,109	**2%**
Toddlers	1 year+ to 3 years (13-36 months)	28,324	**16%**
Pre-schoolers	3 years+ to 6 years (37-72 months)	116,474	**67%**
School age	6 years+	25,290	**15%**
	Total	**173,197**	**100%**

There has been little year-on-year change in the composition, by age, of children attending early years services. The most notable change is in respect of school age children, whose share accounted for 2% more than the previous year. Pre-schoolers continue to represent the single largest cohort, as illustrated in Figure 5.3.

30 Information about maternity and paternity leave, and other related benefits, is available from the Department of Employment Affairs and Social Protection at the following link: https://www.welfare.ie/en/Pages/Maternity-and-Adoption_holder.aspx

Figure 5.3 Percentage of children in childcare settings by stage in childhood, 2012 - 2017/18[31]



Over the last three years, there have been some noticeable year-on-year changes in the proportion of children attending various service types. Table 5.6 shows the breakdown of children by service type over the last three years. In 2017/18, the largest share of children were in sessional care (47%), 18% were enrolled in full day care and 17% were attending after-school. A further 13% availed of part-time childcare. Compared to last year, the share of children in sessional care decreased from 52% in 2016/17 to 47% this year, while the proportion of those in full day care increased.

Table 5.6 Percentage of enrolled children by service type offered

Service type	2015/16	2016/17	2017/18
Sessional	47%	52%	47.1%
Full day care	16%	16%	18.2%
After-school	18%	17%	17.0%
Part-time care	14%	12%	13.0%
Breakfast club	3%	4%	4.4%
Drop-in	0.7%	0.3%	0.3%
Overnight	0.0%	0.0%	0.0%

Private childcare facilities cater for over two thirds (68%) of children enrolled, with the balance (32%) attending community services. As children get older, in particular when they reach school age, they are more likely to be enrolled in a community facility. While the average proportion of children attending community services stands at 32%, this rises to 36% for those aged 5+ to 6 years, to 38% for those aged 6+ to 8 years, and to 50% for those aged 8 and over. For a full breakdown see Table 5.7.

31 These figures are based on survey data.

Table 5.7 Number and percentage of children enrolled by age range and organisation type

Age range	Community	Private	Community %	Private %
Up to 1 year (0-12 months)	811	2,298	26%	74%
1 year+ to 2 years (13-24 months)	3,193	7,082	31%	69%
2 years+ to 3 years (25-36 months)	6,132	11,917	34%	66%
3 years+ to 4 years (37-48 months)	15,348	39,489	28%	72%
4 years+ to 5 years (49-60 months)	13,465	33,989	28%	72%
5 years+ to 6 years (61-72 months)	5,135	9,048	36%	64%
6 years+ to 8 years (73-96 months)	5,010	8,026	38%	62%
8 years+	6,165	6,089	50%	50%
Total	**55,259**	**117,938**	**32%**	**68%**

As was the case in previous years, community facilities tend to cater for larger numbers of children than their private counterparts. The average number of children in community services is 52 compared to 41 in private services. Compared to last year, the figure for community services has increased by two children, while there has been a decline in the average number of children in private services of one child. Services in urban areas are also larger (with an average of 47 children), than those in rural areas (with an average of 39 children). See Table 5.7 for a detailed breakdown.

69% of children attended urban based services, with the remaining 31% attending rural services (see Table 5.8). The proportion of babies and toddlers enrolled in urban services is higher than the overall share of children (69%) in these services, at 73% and 75% respectively. School age children are more likely to attend rural services (34%), as their share is 3% higher than the overall proportion of children in rural services.

Table 5.8 Number and percentage of children enrolled by age and location of provider

Age range	Urban	Rural	Urban %	Rural %	N/A*	Total
Up to 1 year (0-12 months)	2,278	830	73%	27%	1	**3,109**
1 year+ to 2 years (13-24 months)	7,684	2,591	75%	25%	0	**10,275**
2 years+ to 3 years (25-36 months)	13,412	4,633	74%	26%	4	**18,049**
3 years+ to 4 years (37-48 months)	38,069	16,734	69%	31%	34	**54,837**
4 years+ to 5 years (49-60 months)	31,934	15,508	67%	33%	12	**47,454**
5 years+ to 6 years (61-72 months)	9,321	4,846	66%	34%	16	**14,183**
6 years+ to 8 years (73-96 months)	8,609	4,395	66%	34%	32	**13,036**
8 years+	8,099	4,136	66%	34%	19	**12,254**
Total	**119,406**	**53,673**	**69%**	**31%**	**118**	**173,197**

*Five services (with 118 children enrolled) could not be geo-coded and do not have an urban/rural classification.

Dublin City and Cork County have the greatest numbers of children enrolled. This is reflective of the size of population in these locations. A quarter of all children enrolled were attending services located in the four local authority areas of Dublin with a total of 42,875 children. In Cork County there were 14,662 children enrolled, followed by Galway (10,514), Kildare (8,045) and Limerick (7,805). As discussed in Section 5.3, these counties also have the largest number of children on waiting lists.

Appendix II provides a county breakdown of children enrolled by age and by the organisation type (community or private), urban/rural location and the average number of children enrolled per facility.

5.3 Vacant places

At the time of the survey, services reported **9,420 vacant places** for 2017/18 with a total of 940 respondents (24% of services) having at least one vacant place within their service. The proportion of services with at least one vacant place decreased by 7% since last year (Figure 5.4). It is **estimated that the total number of vacancies is 11,021** (see Table 5.9 for the extrapolation of vacant places by age). The estimated number of vacant places declined by 65% since 2014, when there were 31,146 places available, and by 31% on 2016/17 (15,892).

Figure 5.4 Percentage of services with at least one vacant place

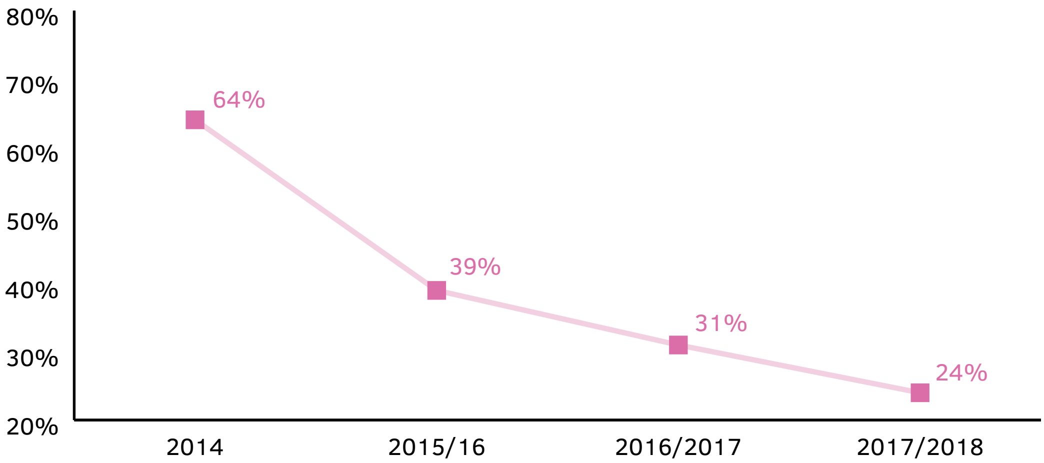


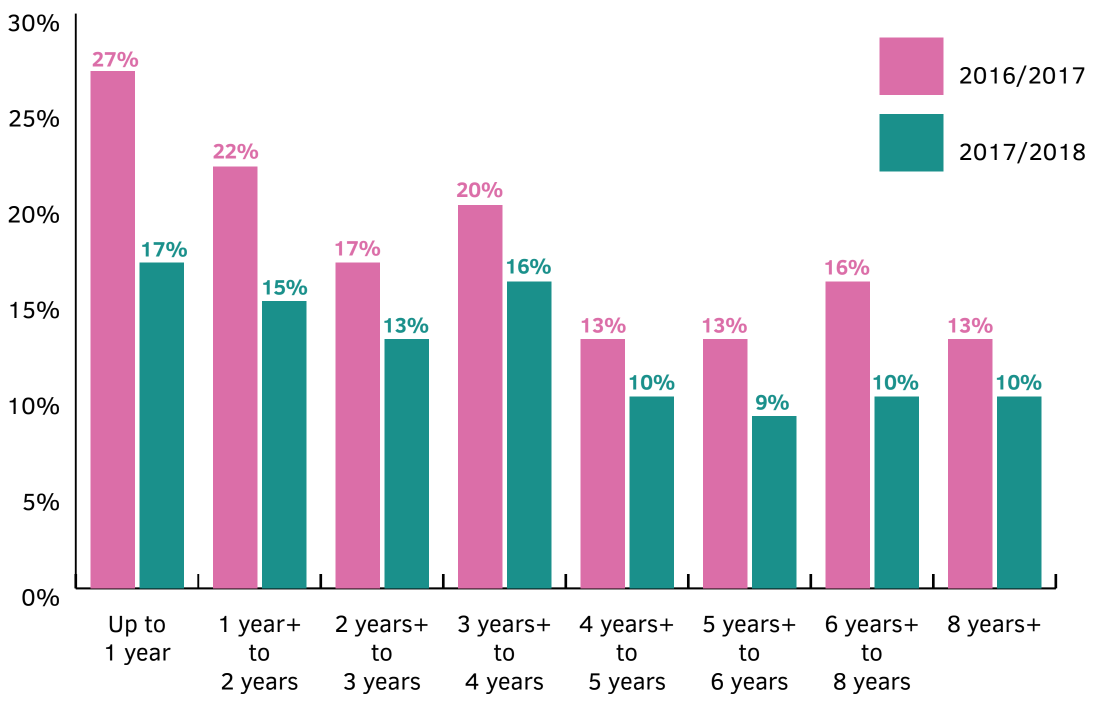
Table 5.9 presents the distribution of vacant places between different age ranges. The highest proportion of vacant places is for children aged 3+ to 4 years (31%) and the second highest share is for children aged 4+ to 5 years (17%). The fewest number of vacant places was recorded for babies and children aged 1+ to 2 years.

Table 5.9 Number and percentage of vacant places (by age) with extrapolated figures

Age range	Number of vacant places	% of all vacancies	Extrapolated number of vacancies nationally
Up to 1 year (0-12 months)	313	3%	366
1 year+ to 2 years (13-24 months)	487	5%	570
2 years+ to 3 years (25-36 months)	1,232	13%	1,441
3 years+ to 4 years (37-48 months)	2,905	31%	3,399
4 years+ to 5 years (49-60 months)	1,639	17%	1,918
5 years+ to 6 years (61-72 months)	1,196	13%	1,399
6 years+ to 8 years (73-96 months)	834	9%	976
8 years+	814	9%	952
Total	**9,420**	**100%**	**11,021**

Figure 5.5 compares the share of services with one or more vacant place by age. The percentage of services with a vacancy has fallen year-on-year across all age cohorts. The single greatest fall has been recorded for babies (from 27% to 17% of services). Across other age groups, the declines are in the order of 3% to 7%.

Figure 5.5 Percentage of services with one or more vacant place by age



The total number of vacant places would be sufficient to cater for 2.3% of all 0-6 year old children in the country. Considering only the 3+ to 4 year old band, this figure more than doubles to 5%, while for under 2's, the figure is less than half at 1%. For a detailed breakdown see Table 5.10.

Table 5.10 Number and percentage of vacant places (by age, up to age 6), based on extrapolated figures

Age range	Number of vacant places	Extrapolated number of vacancies nationally	Number of children[32]	Vacancy rate (as a % of children)
Up to 1 year	313	366	62,257	0.6%
1 year+ to 2 years	487	570	64,029	0.9%
2 years+ to 3 years	1,232	1,441	66,318	2.2%
3 years+ to 4 years	2,905	3,399	68,076	5.0%
4 years+ to 5 years	1,639	1,918	70,835	2.7%
5 years+ to 6 years	1,196	1,399	72,404	1.9%
Total	**7,772**	**9,093**	**403,919**	**2.3%**

The vacancy rate is calculated by dividing the number of vacant places by the number of children enrolled. With 173,197 children enrolled and 9,420 vacant places, nationally, the vacancy rate is 5%. This is down from 9% in the previous year and 12% the year before. Table 5.11 presents the number of vacant places, number of children enrolled and vacancy rates by age, while Figure 5.6 presents changes in the vacancy rate over the last three years for each age group. The reduction of the vacancy rate in that period has affected all age cohorts, with the babies category recording the highest drop over the last year, from 22% in 2016/17 to 10% this year.

Table 5.11 Number of vacant places as a percentage of numbers enrolled (by age)

Age range	Number of vacant places	Number of children enrolled	Vacancy rate
Up to 1 year (0-12 months)	313	3,109	10%
1 year+ to 2 years (13-24 months)	487	10,275	5%
2 years+ to 3 years (25-36 months)	1,232	18,049	7%
3 years+ to 6 years (37-72 months)	5,740	116,474	5%
6 years+ to 8 years (73-96 months)	834	13,036	6%
8 years+	814	12,254	7%
Total	**9,420**	**173,197**	**5%**

In absolute terms, the number of vacancies and the number of services with vacancies is greatest in respect of 3+ to 6 year olds (5,740). However, the number of enrolments (116,474) is also greater for this age cohort than any other. When the number of vacancies is expressed as a percentage of enrolments, the figure is 5%. This is down from 7% last year, as shown in Figure 5.6. The vacancy rates have declined across all age cohorts compared to the previous year. The sharpest decline has occurred in respect of places for babies. In 2015/16, the highest vacancy rate for babies stood at 27% falling to 22% last year, and to 10% in 2017/18. If these trends continue and vacancy rates continue to decline, the sector will face increasing capacity issues, particularly if the birth rate increases.

32 These figures are taken from the 2016 Census.

Figure 5.6 Change in the vacancy rate by age, 2015/16 – 2017/18

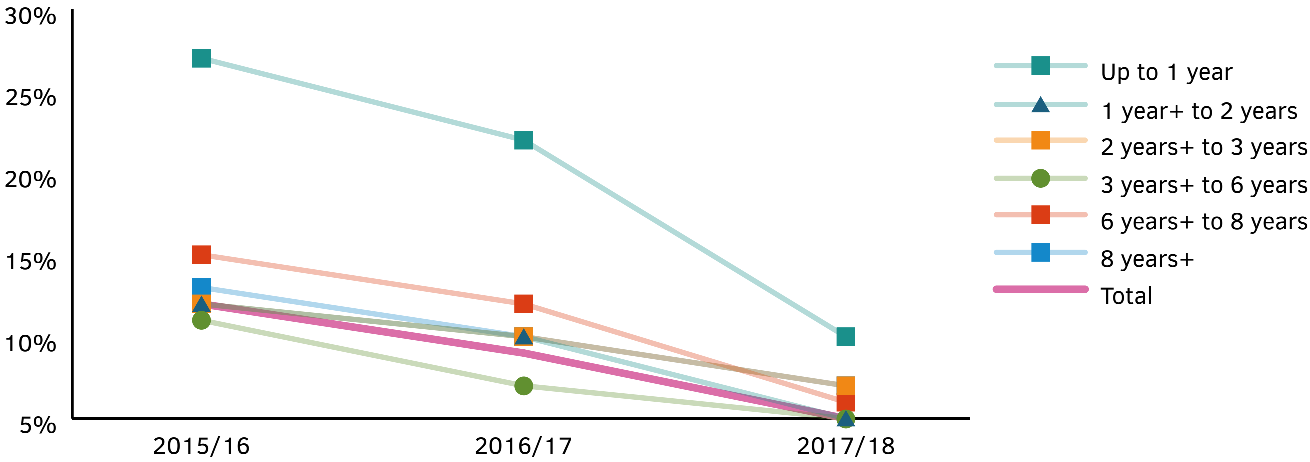


Table 5.12 shows the breakdown of vacant childcare places by organisation type and urban/rural location. The breakdown of vacant places by organisation type is similar to that for enrolments. For example, community services account for 31% of vacancies and 32% of enrolments. Services located in rural areas have a higher share of vacant places (43%) compared to the enrolments (31%), while this share is lower in urban areas (57%) compared to 69% of enrolments. This is indicative of greater demand for childcare places in urban areas.

Table 5.12 Number of vacant places by age range

Age range	Community	Private	Urban	Rural	Total
Up to 1 year (0-12 months)	70	243	231	82	**313**
1 year+ to 2 years (13-24 months)	131	356	366	121	**487**
2 years+ to 3 years (25-36 months)	400	832	780	452	**1,232**
3 years+ to 4 years (37-48 months)	954	1,951	1,647	1,258	**2,905**
4 years+ to 5 years (49-60 months)	532	1,107	872	767	**1,639**
5 years+ to 6 years (61-72 months)	352	844	672	524	**1,196**
6 years+ to 8 years (73-96 months)	250	584	403	431	**834**
8 years+	200	614	399	415	**814**
Total number of vacant places	**2,889**	**6,531**	**5,370**	**4,050**	**9,420**
As a % of all vacancies	**31%**	**69%**	**57%**	**43%**	

Table 5.13 shows the county distribution of the numbers of children enrolled, vacant places and vacancy rates. As was the case in 2016/17, Donegal had the highest vacancy rate, at 13%. The counties with the lowest vacancy rate, at 3%, were Sligo, Carlow, Kerry and Cavan.

Table 5.13 County breakdown of number of vacant places as a percentage of children enrolled

County	Enrolled	Vacant places	Vacancy rate
Sligo	3,144	88	3%
Carlow	2,057	68	3%
Kerry	5,625	186	3%
Cavan	3,120	104	3%
Longford	1,685	59	4%
Dublin – Dún Laoghaire-Rathdown	6,357	224	4%
Limerick	7,805	278	4%
Dublin – Dublin City	16,075	581	4%
Kildare	8,045	304	4%
Dublin – South Dublin	9,294	373	4%
Dublin – Fingal	11,149	450	4%
Roscommon	2,311	98	4%
Waterford	4,612	203	4%
Louth	4,297	197	5%
Wexford	5,724	281	5%
Kilkenny	3,944	195	5%
Meath	6,996	355	5%
Leitrim	1,437	74	5%
Wicklow	4,276	224	5%
Monaghan	3,623	190	5%
Galway	10,514	620	6%
Tipperary	6,662	437	7%
Cork City	4,246	295	7%
Cork County	14,662	1,032	7%
Mayo	4,509	331	7%
Laois	3,695	298	8%
Offaly	2,697	225	8%
Clare	4,280	383	9%
Westmeath	3,781	385	10%
Donegal	6,575	882	13%
Total	**173,197**	**9,420**	**5%**

Table 5.14 presents the breakdown of vacant places by service type offered for organisation type and urban/rural location. The largest share of vacant places is for sessional childcare (42%), followed by after-school (18%). There are almost equal numbers of vacancies in respect of both full day care and part-time care. Relative to their number of enrolments, the distribution of vacancies between community and private services is proportional – community services account for 32% of enrolments and 29% of vacant places, while private services account for 68% of enrolments and 71% of vacancies (see Table 5.7). However, like in the case of distribution of vacancies by age group, there are proportionately more vacant places in services in rural areas than urban ones. Rural services account for 41% of all vacancies, but have 31% of enrolments, while for urban services the corresponding figures are 59% of vacancies and 69% of enrolments (see Table 5.8).

Table 5.14 Number of vacant places by service type offered

Service type	Community	Private	Urban*	Rural*	Total	% of service type
After-school	1,006	2,219	1,742	1,483	**3,225**	**18%**
Breakfast club	384	1,669	1,184	869	**2,053**	**11%**
Drop-in	70	101	90	81	**171**	**1%**
Full day care	411	2,103	1,799	715	**2,514**	**14%**
Overnight service	0	0	0	0	**0**	**0%**
Part-time care	791	1,721	1,471	1,039	**2,512**	**14%**
Sessional	2,670	4,968	4,322	3,316	**7,638**[33]	**42%**
Total number of vacant places	**5,332**	**12,781**	**10,608**	**7,503**	**18,113**	**100%**
% of vacant places	**29%**	**71%**	**59%**	**41%**	**29%**	**n/a**

*One service (with two part-time care places) could not be geo-coded and does not have an urban/rural classification.

5.4 Waiting lists

Services were asked to provide the number of children on a waiting list by age and service type. The number of children on waiting lists is an indication of demand. However, as parents often place their child/children on more than one waiting list, this figure cannot be used to measure actual demand but is a useful indicator of trends. These are discussed in more detail below.

In 2017/18, services reported **14,558 children on waiting lists**, which, when extrapolated, gives a figure of **16,470 nationally**. The overall size of the waiting list has declined since last year (by 12%), however, its composition by age remained broadly similar to that of previous years.

Table 5.15 shows the breakdown of children on waiting lists by age. Children aged 0 to 3 years old represented almost half of all children on waiting lists (49%), and the share of this age group increased by 5% on 2016/17. This increase has been driven by the 5% increase in the children on waiting lists aged between 0 and 2 years. Waiting lists are smaller for children of school age, with only 11% of all children on waiting lists being older than 5 years. In comparison, this group represented 15% of all children on waiting lists last year. This decrease, combined with the higher than average growth in enrolments amongst school age children, would indicate that the demand for school age places is increasingly being met. However, the increase in the number of children on waiting lists under 3 years of age combined with a higher than average increase in the number of enrolments for this cohort (see Table 5.4), indicates that demand for places for this age group is growing.

33 Sessional a.m. 4,483; Sessional p.m. 3,155

Table 5.15 Age breakdown of children on waiting lists

Age range	Number of children on waiting lists – 2017/18	% of those on waiting lists	
		2016/17	2017/18
Up to 1 year (0-12 months)	1,799	10%	**12%**
1 year+ to 2 years (13-24 months)	2,537	14%	**17%**
2 years+ to 3 years (25-36 months)	2,977	20%	**20%**
3 years+ to 4 years (37-48 months)	3,927	31%	**28%**
4 years+ to 5 years (49-60 months)	1,698	11%	**12%**
5 years+ to 6 years (61-72 months)	648	6%	**4%**
6 years+ to 8 years (73-96 months)	589	6%	**4%**
8 years+	383	2%	**3%**
Total	**14,558**	**100%**	**100%**

Table 5.16 also provides an insight into pressure points in respect of waiting lists. It suggests that the greatest mismatches between supply and demand are for children aged 3 years and younger. The number of babies on waiting lists is more than half of the total number enrolled, while for 1+ to 2 year olds, the proportion is 25%. In overall terms, the size of the waiting lists is the equivalent of 8% of the total number of children enrolled.

Table 5.16 Waiting lists relative to enrolments by age

Age range	Number on waiting lists	Number of children enrolled	No. on waiting lists as % of children enrolled
Up to 1 year (0-12 months)	1,799	3,109	58%
1 year+ to 2 years (13-24 months)	2,537	10,275	25%
2 years+ to 3 years (25-36 months)	2,977	18,049	16%
3 years+ to 4 years (37-48 months)	3,927	54,837	7%
4 years+ to 5 years (49-60 months)	1,698	47,454	4%
5 years+ to 6 years (61-72 months)	648	14,183	5%
6 years+ to 8 years (73-96 months)	589	13,036	5%
8 years+	383	12,254	3%
Total	**14,558**	**173,197**	**8%**

As noted in previous reports, the size of waiting lists among children aged 1+ to 3 years may be associated with parents seeking to ensure that their child/children secures an ECCE place in the setting of their choice. While this reason is likely still to be valid for children aged 2+ to 3 years, in the case of children up to 2 years the underlying causes are more likely to include the introduction of the universal subsidy (CCSU) and more women returning to work due to the economic upturn.

There is a significant difference in the distribution of children on waiting lists between community and private providers. The demand for places in community services is higher. 42% children were on waiting lists in community services compared to 32% of all children being enrolled in community services (see Table 5.7). This, combined with the lower share of vacant places in community services

(29%) compared to private ones (see Table 5.14), indicates higher demand for childcare offered by community facilities. There are very considerable differences between urban and rural services, with 81% of children waiting for a place in an urban service, as opposed to just 19% waiting on a place in a rural one.

Appendix I presents the detailed county breakdown of children on waiting lists. The more urbanised counties have the highest numbers of children on waiting lists. 42% of all children on waiting lists are seeking a place in a service located in one of the four Dublin local authority areas (6,087). In comparison, 25% of all children enrolled attend a service in these areas.

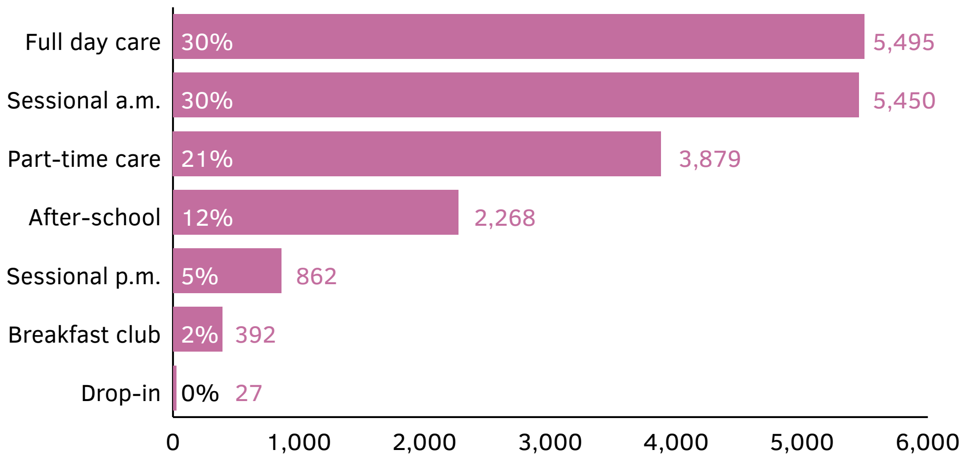
Table 5.17 Number and percentage of children on a waiting list (by age), by organisation type and urban/rural

Age range	Community	Private	Urban	Rural	Total	% of total
Up to 1 year	626	1,173	1,365	434	1,799	**12.4%**
1 year+ to 2 years	1,275	1,262	2,025	512	2,537	**17.4%**
2 years+ to 3 years	1,664	1,313	2,504	473	2,977	**20.4%**
3 years+ to 4 years	1,329	2,598	3,247	680	3,927	**27.0%**
4 years+ to 5 years	615	1,083	1,383	315	1,698	**11.7%**
5 years+ to 6 years	222	426	540	108	648	**4.5%**
6 years+ to 8 years	223	366	461	128	589	**4.0%**
8 years+	181	202	300	83	383	**2.6%**
Total	**6,135**	**8,423**	**11,825**	**2,733**	**14,558**	**100%**
As a % of waiting list	**42%**	**58%**	**81%**	**19%**	**n/a**	**n/a**
No. on waiting lists as a % of enrolments	**11%**	**7%**	**10%**	**5%**	**8%**	**n/a**

Appendix III and Appendix IV presents the number of children on a waiting list as a percentage of children enrolled by age by organisation type and urban/rural location of services, respectively.

The total number of children on waiting lists by service type was 18,373 (see Figure 5.7 for a detailed breakdown). The largest number of children were waiting for a place in a full day care (5,495), followed closely by morning sessional care (5,450). The smallest demand was for drop-in services and breakfast clubs.

Figure 5.7 Number and percentage of children on waiting lists by session type



In 2017/18, services reported a total of 6,312 children on waiting lists for sessional services, which constituted 34% of all children on waiting lists by service type. When compared with the number of vacant places reported for different service types, the number of children on waiting lists is smaller than the number of vacant places for all service types with the exception of full day care, part-time care and sessional a.m. services (see Table 5.14). The number of children on waiting lists for full day care (5,495) is more than double the number of vacant places for this type of childcare (2,514), just over one third for part-time care (3,879 on waiting lists and 2,512 vacancies) and 18% for sessional a.m. services (5,450 on waiting lists and 4,483 vacancies). This indicates a significant unmet demand for full-time and part-time childcare and a geographical mismatch between supply and demand for other types of childcare.

5.5 Capacity

Data on capacity is integral to informing the overall management and planning for the future strategic direction of the childcare sector. This section analyses capacity using the enrolments and vacant places data as reported in the service profile survey. The overall capacity of the sector is calculated by adding the number of children enrolled and the number of vacant places. In 2017/18, **services reported capacity of 182,617**. Extrapolating this figure, it can be estimated that **the overall capacity of the sector is 213,654**. This represents an increase of 6% on the previous year. However, this increase is lower than the overall growth in the number of children enrolled (9%) (see Section 5.2), indicating the availability of places is decreasing in the sector.

The capacity of services differs across the country. Table 5.18 provides a county level breakdown of the sector's capacity for children aged between 3+ and 5 years – the largest cohort of children in childcare settings. The capacity in the early years services is compared against the total population of 3+ to 5 year olds (CSO data from Census 2016). At 48%, services in Longford have the lowest capacity to accommodate this age group, while services in Cork City have the highest capacity and are able to accommodate 82% of all children in this age cohort.

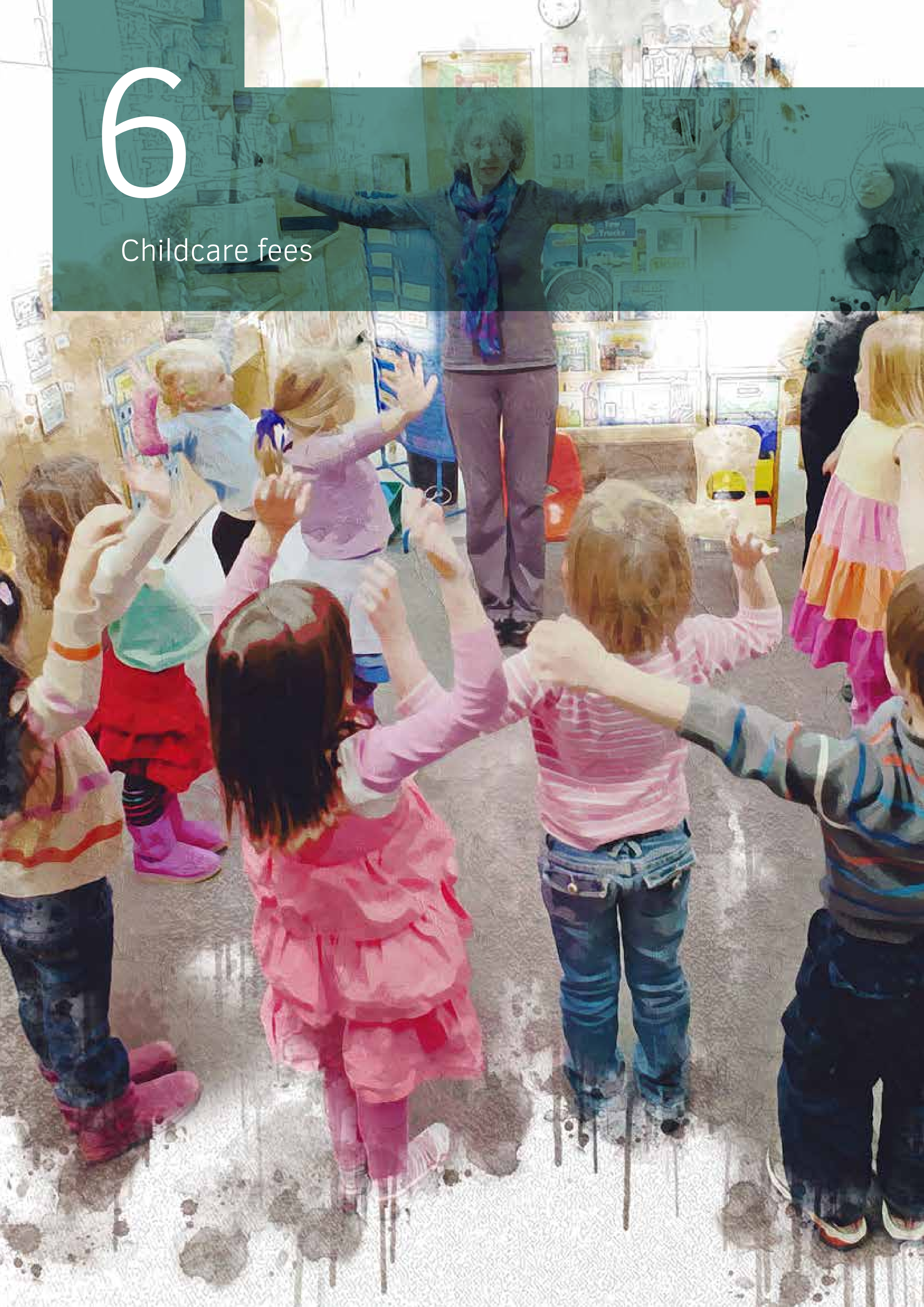
Table 5.18 Capacity by county for children aged 3-5 years (extrapolated) as a percentage of total population for that age group

County	Capacity – all age ranges (enrolled + vacancies)	Capacity 3 – 5 year olds (extrapolated)	Population 3 - 5 year olds (CSO, 2016 Census)	% capacity of population of 3 – 5 year olds (extrapolated)
Longford	1,744	953	1,986	48%
Dublin – Fingal	11,599	8,560	15,962	54%
Dublin – South Dublin	9,667	7,539	13,892	54%
Meath	7,351	5,666	10,407	54%
Roscommon	2,409	1,553	2,815	55%
Kildare	8,349	6,262	11,291	55%
Cork County	15,694	11,315	20,257	56%
Kilkenny	4,139	2,599	4,603	56%
Kerry	5,811	3,388	5,944	57%
Cavan	3,224	2,126	3,704	57%
Leitrim	1,511	810	1,393	58%
Mayo	4,840	3,103	5,330	58%
Laois	3,993	2,545	4,348	59%
Louth	4,494	3,547	6,055	59%
Wicklow	4,500	4,082	6,787	60%
Waterford	4,815	2,961	4,922	60%
Clare	4,663	3,089	5,134	60%
Galway	11,134	6,826	11,343	60%
Limerick	8,083	5,177	8,385	62%
Westmeath	4,166	2,555	4,127	62%
Carlow	2,125	1,642	2,646	62%
Donegal	7,457	4,382	7,049	62%
Dublin – Dún Laoghaire-Rathdown	6,581	5,405	8,551	63%
Monaghan	3,813	1,855	2,925	63%
Sligo	3,232	1,787	2,813	64%
Wexford	6,005	4,204	6,605	64%
Offaly	2,922	2,294	3,596	64%
Dublin – Dublin City	16,656	11,504	17,838	64%
Tipperary	7,099	4,427	6,855	65%
Cork City	4,541	3,064	3,752	82%
Total	**182,617**	**124,992**	**211,315**	**59%**

The survey respondents were asked to indicate if they had plans to increase the number of places their service offers. In response, 26% indicated that they intend to increase capacity, this is down from 31% last year. Respondents were also asked to state how many new places they anticipate creating. When extrapolated, the responses indicated that an additional 15,796 places may be created. Taking the anticipated increase (for 2018/19, i.e. 15,796), as a percentage of the current extrapolated capacity of 213,654, a 7% increase in capacity could be achieved if these places were created.

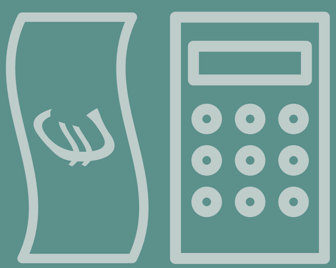
6

Childcare fees

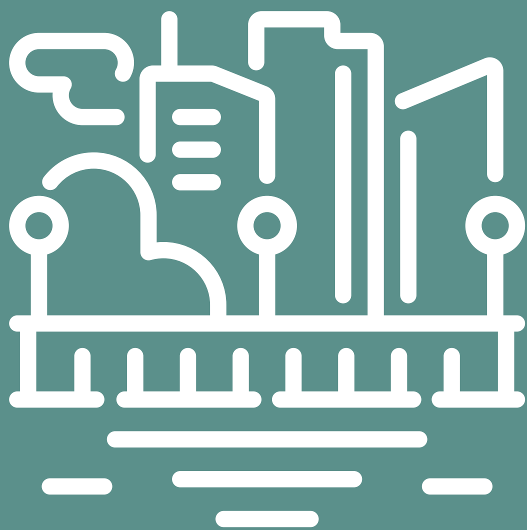


Childcare fees

The average weekly cost of full day childcare has increased by almost **€4** from **€174** to **€178** ↗



Fees increased more in rural areas and community services



Fees are more expensive in urban areas and private services

Higher fees in affluent areas

↗ **39%** for full-time

67% for part-time ↗

6.1 Introduction

This chapter provides analysis of childcare fees reported by services for different service types and examines the factors influencing fees. These factors include geography (service location), organistion type, levels of affluence/deprivation of the area where the service is located and staff qualifications.

The survey respondents were asked to provide data on weekly fees by service type, based on one child attending five days per week. If a service charged more than one fee for a given service type, respondents were asked to state the average weekly fee for that service type. Respondents were also asked to take account of any subventions (e.g. Early Childhood Care and Education (ECCE)) and to include them in the fee.

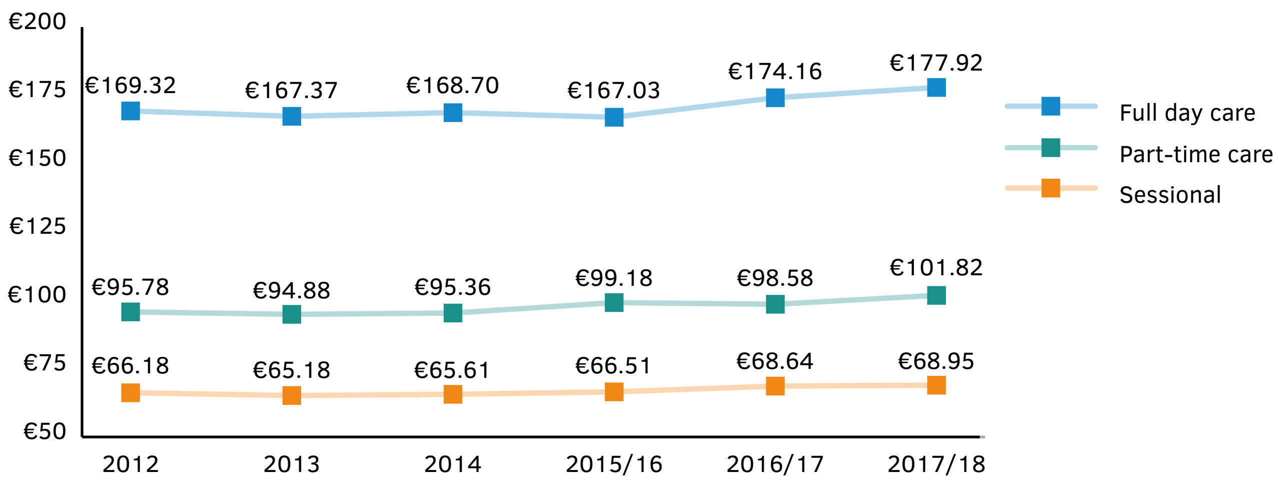
6.2 Overall national fees

In 2017/18, **the average weekly fee**, per child, **for full day care was €177.92**. The average weekly fee for part-time childcare was €101.82 and for sessional care it was €68.95. The average weekly childcare fee for full day care increased by €3.76 or 2.2% since 2016/17[34]. Table 6.1 and Figure 6.1 show the changes in the level of childcare fees over time. The largest increase, year-on-year and over time, was observed for part-time fees, which increased by 3.3% since last year and by over 6% since 2012.

Table 6.1 Average weekly fees for selected years and change over time, by childcare type

	2016/17	2017/18	Change since 2016/17	Change since 2012
Full day care	€174.16	€177.92	+2.2%	+5.1%
Part-time care	€98.58	€101.82	+3.3%	+6.3%
Sessional	€68.64	€68.95	+0.5%	+4.2%

Figure 6.1 Average weekly childcare fees since 2012 (full day care, part-time and sessional childcare)



34 This is above the rate of inflation in the Irish economy. The Central Bank of Ireland records an inflation rate of 0.7% for the year to June 2018 (Central Bank of Ireland, 2018).

6.3 Fees by location

The fees charged by services vary depending on location. Usually, services located in urban areas and in counties on the east coast charge higher fees, while in rural areas and counties in the Midland, Western and Border regions tend to have lower fees. Table 6.2 provides a county level breakdown of fees by childcare type. Like last year, the highest fees were reported in Dún Laoghaire-Rathdown, where the average weekly fee for full day care was €233.26. This is €55.34 or 31% above the national average. The majority of counties with higher fees also have more children on waiting lists, as noted in Chapter 5 of this report. This would indicate that higher demand for places is likely to lead to price increases. The lowest average fee for full day care was reported in Longford, at €146.56, which is €31.36 or 18% below the national average. The difference between the highest and lowest fees at county level was €86.70 for full day care; €52.45 for part-time care and €26.34 for sessional care. Dún Laoghaire-Rathdown is the most expensive county for all three types of childcare, while Leitrim is the least expensive for part-time childcare and Donegal is the cheapest county for sessional care.

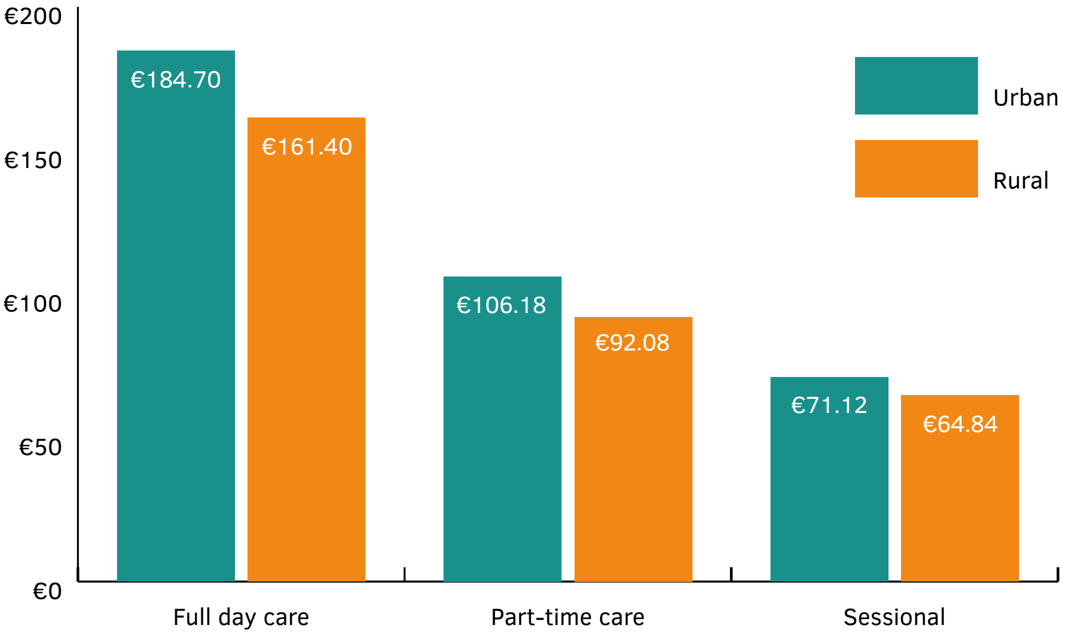
It is worth noting that while there are large differences between average fees between counties, the fees charged by services within counties also vary. For example, the lowest fee reported by a service in Dún Laoghaire-Rathdown was €150, while the highest was €308.

Fees also differ between services located in urban and rural areas. Figure 6.2 shows the average fees charged by services located in urban and rural areas. Across all types of childcare, fees are higher in services based in urban locations. The widest gap is in respect of part-time care – average weekly fees are 15% higher in urban than in rural locations. For full day care they are 14% higher and 10% higher for sessional childcare. Over the last year, the difference in fees between urban and rural services narrowed, as the average weekly fee for full day care increased by €1.94 (1.1%) across urban services and by €2.56 (1.6%) across rural services.

Table 6.2 Average weekly fee by county (full day care, part-time and sessional childcare)

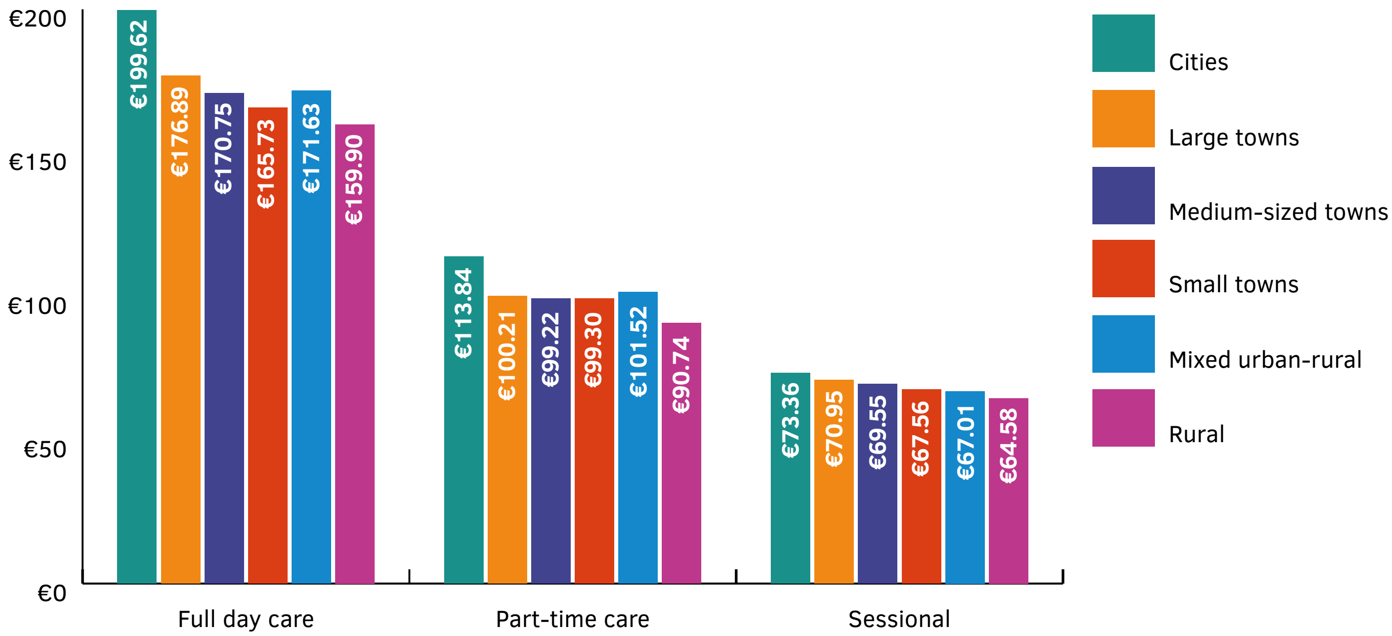
County	Full day care	Part-time care	Sessional
Dublin – Dún Laoghaire-Rathdown	€233.26	€127.45	€86.26
Cork City	€206.67	€104.27	€68.68
Dublin – Fingal	€206.25	€115.23	€71.44
Dublin – South Dublin	€202.25	€116.92	€72.17
Wicklow	€200.21	€102.47	€71.77
Dublin – Dublin City	€195.79	€115.71	€71.90
Cork County	€192.37	€108.57	€71.06
Meath	€183.52	€100.68	€68.80
Kildare	€181.39	€113.42	€73.59
Kerry	€172.17	€90.24	€62.01
Louth	€172.12	€101.05	€68.69
Westmeath	€167.97	€90.50	€69.45
Donegal	€167.22	€100.98	€59.92
Wexford	€166.34	€97.30	€67.69
Laois	€164.46	€103.04	€66.85
Offaly	€162.00	€102.33	€68.01
Kilkenny	€159.87	€88.61	€66.46
Galway	€159.44	€96.29	€67.33
Limerick	€159.00	€90.12	€67.98
Clare	€157.72	€90.54	€67.50
Waterford	€157.24	€88.94	€61.55
Cavan	€156.94	€91.13	€63.21
Leitrim	€156.54	€75.00	€62.14
Mayo	€156.40	€85.04	€64.26
Tipperary	€155.08	€92.02	€67.33
Sligo	€153.48	€98.47	€74.11
Roscommon	€151.00	€85.55	€63.69
Carlow	€149.53	€84.29	€70.02
Monaghan	€147.97	€80.12	€64.35
Longford	€146.56	€88.68	€63.31
Total	**€177.92**	**€101.82**	**€68.95**

Figure 6.2 Average weekly fees for full day care, part-time and sessional childcare by urban/rural location



A further analysis of the impact of location on fees has been carried out by specifying the location of every childcare facility on a continuum from cities through to rural areas, based on the facility's address[35]. The breakdown of fees depending on the size of the settlement is provided in Figure 6.3. The fees are highest in the cities and are declining gradually with the size of the town towards rural locations. The average weekly fee for full day care in cities is €199.62, and in rural areas it is €159.90. The difference between fees in rural areas and cities is €39.72.

Figure 6.3 Average weekly fees for full day care, part-time and sessional childcare by geography – across a continuum from cities to rural areas

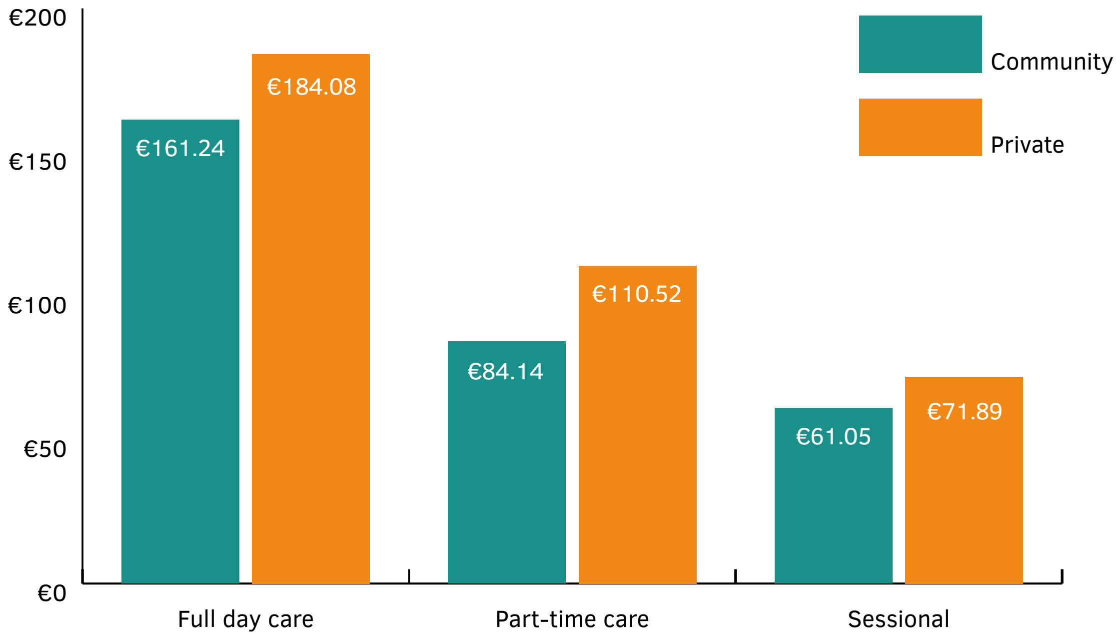


35 The system has been developed by the Central Statistics Office (CSO), using criteria such as population density, as referenced in Section 1.3.4 of this report. Under this system, large towns are defined as those that have a population range from 10,000 to 50,000 persons, while medium-sized towns have a population range from 5,000 to 10,000. Small towns have between 1,500 and 5,000 persons.

6.4 Fees by organisation type

On average, fees charged by private services are higher than those charged by community ones across all childcare types (full-time, part-time and sessional), see Figure 6.4. Weekly fees in private services are 14% higher for full day care, 31% higher for part-time care and 18% higher for sessional childcare.

Figure 6.4 Average weekly fees for full day care, part-time and sessional childcare by organisation type



When compared to last year, fee increases were more significant among community providers (see Table 6.3 for details). This was particularly noticeable in relation to full day care where average fees charged by community providers increased by 4.1% compared to 1.4% for private services (for full day care). The same pattern was also observed for sessional care where there was a 3.8% fee increase in community services compared to a 0.4% decrease in private services. Given this and the narrowing gap in fees charged by services in urban and rural areas, part of the overall increase in the level of fees could be attributed to community facilities and those located in rural areas catching up with the rest of the country.

Table 6.3 Percentage change in average weekly fees for full day care, part-time and sessional childcare by organisation type, 2016/17 to 2017/18

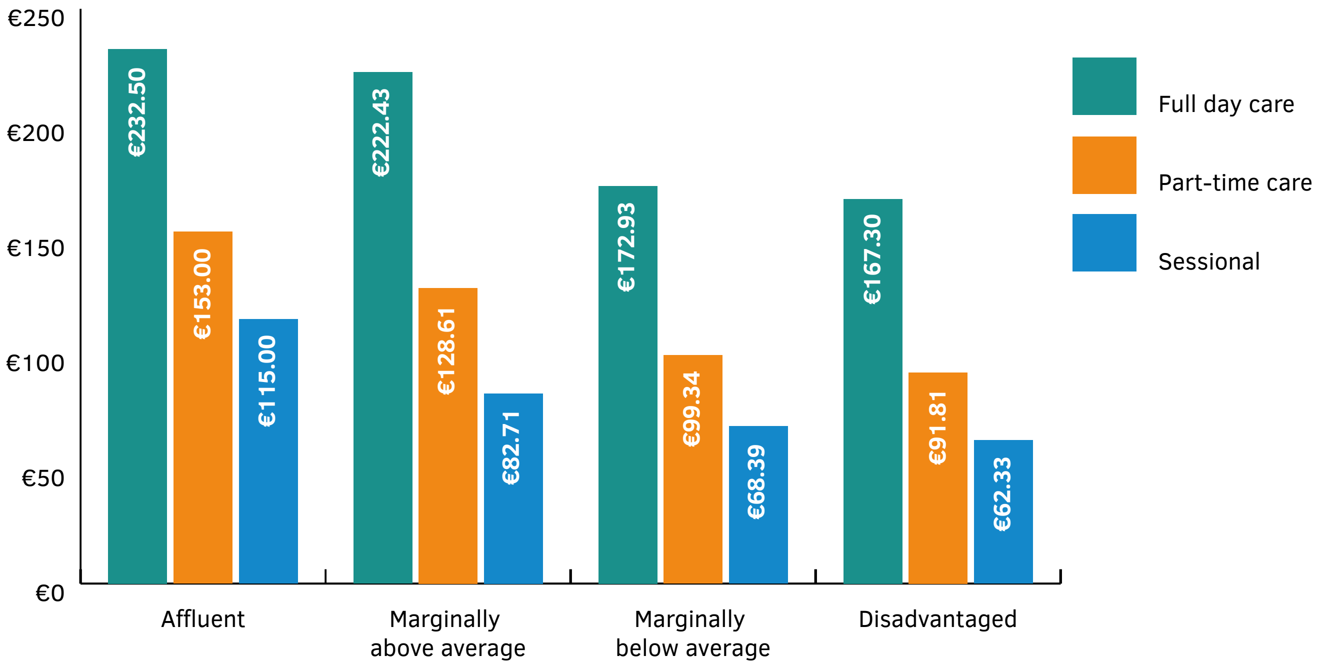
Facility type	Full day care	Part-time care	Sessional
Community	4.1%	3.5%	3.8%
Private	1.4%	3.5%	-0.4%

6.5 Fees by level of deprivation

The fees data was analysed to examine if there is any relationship between fees and the level of affluence or deprivation of the area in which a childcare facility is located. To ascertain the level of affluence or deprivation, the Pobal Haase-Pratschke Index[36] was used. The index uses information from the Census of Population, such as employment, age profile and educational attainment, to calculate an affluence/ deprivation score for an area. The location of each childcare facility was assigned the HP Index score, based on the Electoral Division (ED) in which it is located. Scores were grouped on a spectrum from very disadvantaged to very affluent (based on bands[37]), as shown in Figure 6.5.

The level of affluence or deprivation of the area where the service is located has a strong impact on fees. Fees are higher in more affluent areas and lower in disadvantaged areas. The average weekly fees for full day care range from €232.50 in affluent areas to €167.30 in disadvantaged areas. With a 39% difference between fees in disadvantaged and affluent areas, level of affluence or deprivation is the strongest influencing factor for fees.

Figure 6.5 Childcare fees for full-time, part-time and sessional care, by relative affluence [38] /deprivation of the area in which the facility is located



36 Information about the Pobal HP Deprivation Index is available on the Pobal website, via the following link: https://www.pobal.ie/research-analysis/ Scores can be obtained for cities and counties and for much smaller areas, including electoral divisions and small areas (units with 50 – 200 households).

37 The bands are based on relative scores, with each band corresponding to one standard deviation.

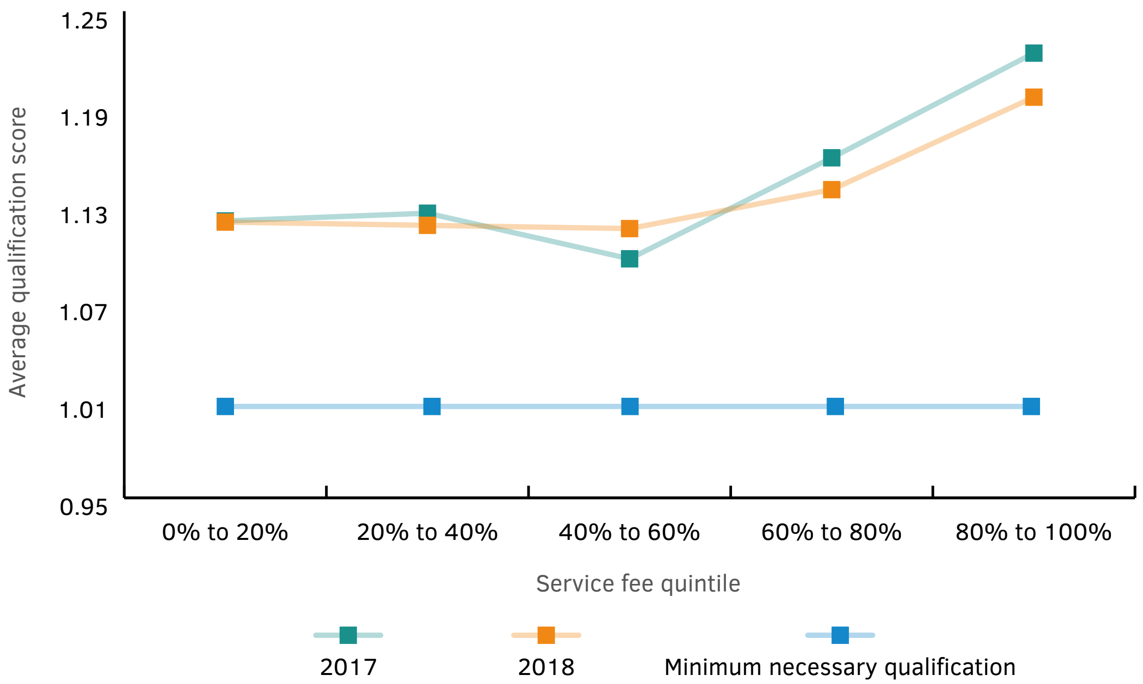
38 While there are six categories on the Haase-Pratschke Index, four are shown here. This is because there are no early years services located in EDs that register as very affluent on the index and also the disadvantaged category includes services located in areas identified as disadvantaged and very disadvantaged.

6.6 Fees by staff qualifications

An analysis was undertaken to investigate if fees are related to staff qualifications. This involved dividing services into five categories, based on the cost of full-time childcare – ranging from the lowest 20% to the highest 20%. As each category had an equal number of services, no weightings were required. A scoring methodology was applied in order to take account of facilities having multiple staff with multiple qualifications. This involved assigning scores as follows: staff with no qualifications and those with qualifications below NFQ Level 5 were assigned a score of 0 (zero); those with NFQ Levels 5 and 6 were awarded a score of 1; and those with NFQ Levels 7 and above were awarded a score of 2. The same methodology was applied in 2016/17.

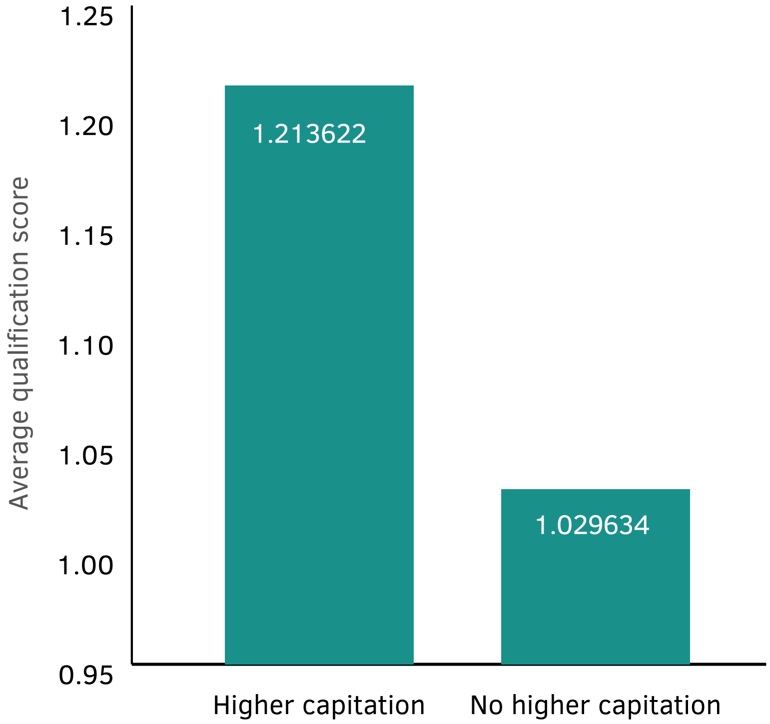
The findings, as presented in Figure 6.6, show that there is a relationship between fees and staff qualifications. However, this relationship is only present in respect of the 40% of services with the highest fees, i.e. the top two categories. The 20% of facilities with the highest fees have the most qualified staff, and the 20% with the second highest tier of fees have the second most qualified staff. Among the remaining 60% of facilities, there is little difference in respect of staff qualifications. In fact, the 2017/18 data indicates a slight dip in the staff qualification levels among those in the middle category, relative to those with lower fees.

Figure 6.6 Qualification score of full-time staff working directly with children by quintile of service fees, 2016/17 and 2017/18



The relationship between fees and staff qualifications in those facilities with the higher fees (the top 40%) is likely to be reflective of the greater capitation rates available for higher-qualified staff[39]. As noted in the introduction to this chapter (Section 6.1), fees are inclusive of subventions. Figure 6.7 shows that services that are in receipt of higher capitation have more qualified staff than other services.

Figure 6.7 Average qualification of staff by services with or without higher capitation



39 A childcare provider that has an ECCE room which meets the following requirements is eligible to apply for ECCE higher capitation: i.e. a room leader with a qualification recognised as meeting the minimum requirements for ECCE 'Higher Cap' as set out on the published list of 'Early Years Recognised Qualifications' or a Letter of Eligibility from DCYA which indicates same; ii. the same room leader has a minimum of three years paid experience working in the childcare sector; iii. the regulatory adult to child ratio is met; and iv. a room assistant (if required for adult to child ratios), who holds a full and relevant qualification that meets the minimum regulatory standards or a letter of eligibility to practice (Department of Children and Youth Affairs).

7

Staff

Staff

29,555 The estimated number of staff working in the early years sector, 8% more than last year

Early years assistants earn an average wage of €11.20 per hour

One in five staff working in community services are on employment schemes

98% of staff working with children are female

47% of all staff staff working in the early years sector do so on a part-time basis

94% of staff are qualified to NFQ Level 5 or higher, an increase of 2% on the previous year

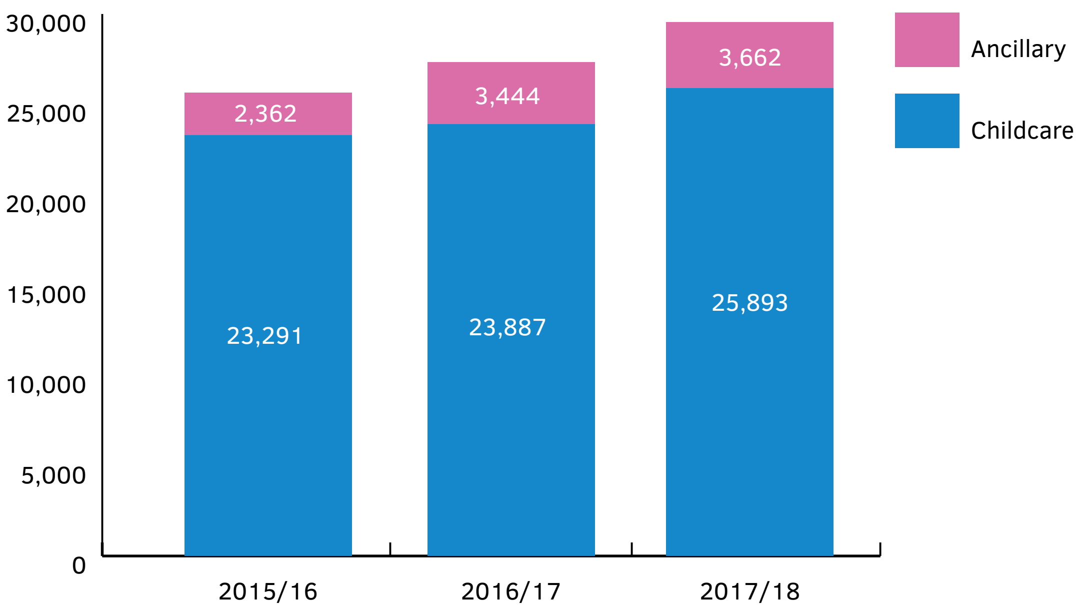
7.1 Introduction

This chapter provides an analysis of the service profile survey data on staff who work in early years services. It includes those who work directly with children as well as ancillary staff[40]. This service profile survey data is the most comprehensive dataset currently available in respect of the early years workforce in Ireland and includes information on staff working in 3,928 early years services.

7.2 Staff numbers

Services reported that there were **25,262 staff working in early years services in 2017/18.** This includes staff working directly with children (22,132 or 88%) and ancillary staff (3,130 or 12%), who work in areas such as management, administration, catering and maintenance. **When these figures are extrapolated, it is estimated that a total of 29,555 staff were working in the sector across Ireland at the time of the survey, which is an increase of 8% on 2016/17.** Figure 7.1 shows the number of staff (extrapolated) over the last three years, for both staff working with children and those in ancillary roles.

Figure 7.1 Total number of staff in early years services (extrapolated figures)



For the first time this year, services were asked to report on relief staff working with children. They reported that 859 staff worked in a relief capacity representing 3.7% of those working directly with children. For the purpose of this report, relief staff working with children were excluded from the analysis of the majority of characteristics, as some of them may work in multiple services and may have, therefore, been reported more than once in the survey (by different services). Where relief staff are included in the analysis (e.g. in the wages section), this is clearly indicated. An overview of relief staff with key profile statistics is outlined below.

40 Ancillary staff are staff providing necessary support to the primary activities or operation of an early years service. These include catering, maintenance and administrative staff.

7.2.1 Relief staff – key characteristics

Relief staff share some characteristics with the other staff who work directly with children. As a cohort, they are predominantly female (97%) and they are almost equally likely to work in urban or rural areas as other staff working with children. However, they are proportionately more likely to work in community services (39%) than in private ones when compared to other staff (35% of other staff working with children do so in community services) (Table 7.1).

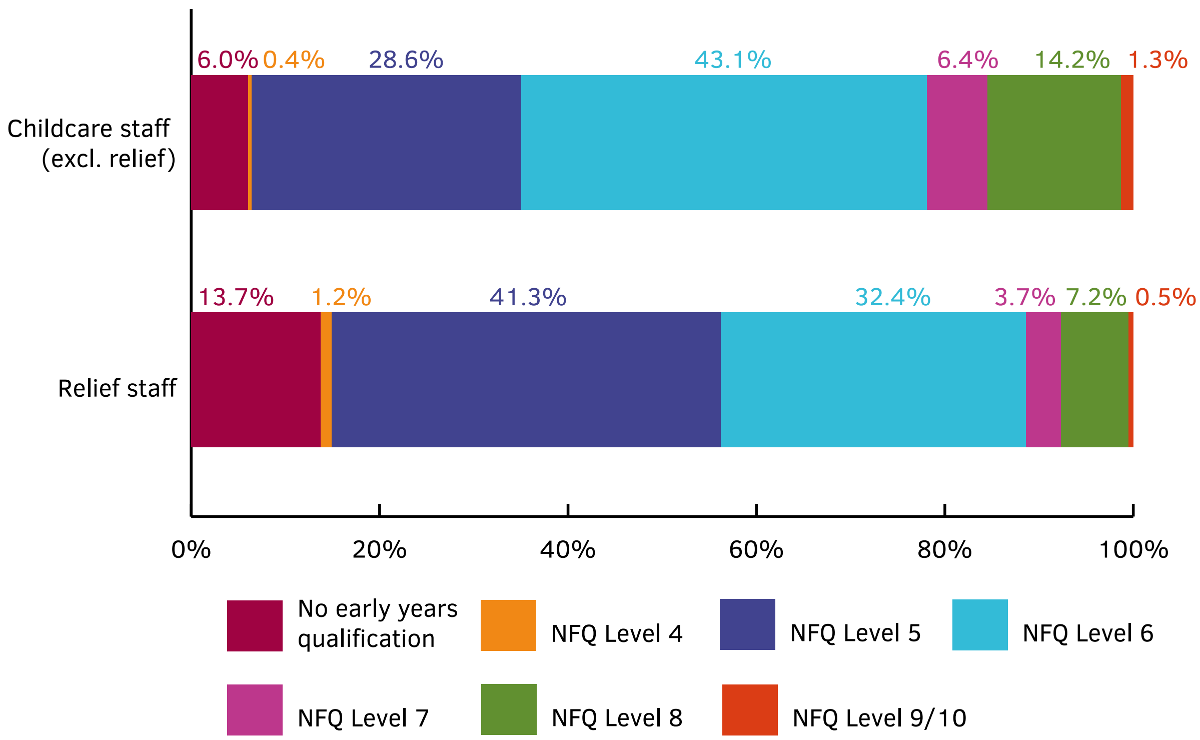
Table 7.1 Number and percentage of relief staff and other childcare staff by location and organisation type

	Community		Private		Urban*		Rural*		All staff
	Number	%	Number	%	Number	%	Number	%	
Relief staff	333	39%	526	61%	615	72%	243	28%	**858**
All other childcare staff	7,780	35%	14,352	65%	15,742	71%	6,377	29%	**22,119**

*Five services (with 13 staff) could not be geo-coded and do not have an urban/rural classification.

Over half of relief staff (58%) have completed Children First training, however, this percentage is lower than for all other childcare staff (70%). Relief staff tend to have less experience in the sector; with 15% having over ten years experience, while the corresponding figure for all other staff is 31% (see Figure 7.5). They also tend to be younger, with 20% of relief staff aged under 24 years compared to 12% of all other childcare staff. The vast majority (85%) of relief staff have an NFQ qualification at Level 5 or higher, although this is lower than for all other staff (94%) (see Figure 7.2).

Figure 7.2 Highest level of staff qualification



Relative to other childcare staff, relief staff are almost twice as likely to be assigned to working with school age children, and less likely to work with babies (see Table 7.2).

Table 7.2 Proportion of childcare staff who work with children of each age cohort

	Up to 1 year	1 year+ to 3 years	3 years+ to 5 years	5+ years
Relief staff	3%	34%	45%	17%
All other childcare staff	6%	25%	60%	9%

7.2.2 Places of employment

Table 7.3 provides a breakdown of the numbers of staff working in community/private and urban/rural services. The majority of staff (63%) work in private services and in urban locations (72%). However, these figures are not proportional to the breakdown of services (who responded to the survey), as 73% are private (see Section 1.3.1.1) and 65% are located in urban areas. This indicates that community services and services in urban areas tend to be larger.

This year, the average number of staff per service was 6.4, a slight increase on the corresponding figure for 2016/17, which stood at 6.2. Community services are, on average, larger than private services with community services employing on average 8.7 staff compared to an average of 5.6 staff in private services. Services in urban areas have an average of 7.1 staff members, while in rural areas the corresponding figure is 5.2. Across all services, an average of 5.6 staff members work directly with children, with 0.8 of a staff position encompassing the various ancillary roles.

Table 7.3 Number of services and staff by organisation type and urban/rural including average number of staff per service[41]

		Staff working directly with children		Ancillary staff		All staff	
Services	Total number of services	Number of staff	Average per service	Number of staff	Average per service	Number of staff	Average per service
All	3,928	22,132	5.6	3,130	0.8	25,262	**6.4**
Community	1,068	7,780	7.3	1,558	1.5	9,338	**8.7**
Private	2,860	14,352	5.0	1,572	0.5	15,924	**5.6**
Urban*	2,552	15,742	6.2	2,321	0.9	18,063	**7.1**
Rural*	1,371	6,377	4.7	807	0.6	7,184	**5.2**

*Five services (with 15 staff - 13 working directly with children and 2 ancillary) could not be geo-coded and do not have an urban/rural classification.

41 These figures relate to the survey profile only (non-extrapolated data).

7.3 Category of employment

Almost half of the staff in the sector (47%) worked on a part-time basis in 2017/18. This represents a slightly lower proportion of part-time staff in the early years workforce than in 2016/17 (50%). The rate of part-time workers in the childcare sector is considerably greater than the national average[42]. Table 7.4 shows the percentage of staff in full-time and part-time employment by organisation type over the past three years. As in previous years, part-time working remains more prevalent in community services, where 57% of staff work part-time.

Table 7.4 Percentage of staff by category of employment[43]

	2015/16		2016/17		2017/18	
	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time
Community	40%	60%	38%	62%	43%	57%
Private	60%	40%	57%	43%	60%	40%

Table 7.5 presents the breakdown of staff in community and private services by employment type. Similarly to 2016/17, the vast majority of staff were direct employees (92%). This proportion is lower in community services, where directly employed staff accounted for 80% of all employees. In comparison, almost all staff in private services (99%) were directly employed.

The breakdown of other employees, i.e. those on employment schemes or other government-funded programmes is similar to last year, with the Community Employment (CE) programme accounting for the largest proportion (6%). CE accounts for the largest proportion (75%) of all scheme/programme staff and for 16% of all staff in community services whereas overall personnel on employment schemes/government programmes account for 20% of the staff complement in community services. Smaller proportions of staff (25% of scheme/programme staff and 2% of all staff) are recruited through other schemes or programmes, including the Community Services Programme, (CSP), the Job Initiative Scheme (JI), Tús and 'Other'. The higher numbers of staff on schemes /programmes in community services is associated with the fact that community services can access a wider range of employment schemes/programmes.

Appendix V provides a county level breakdown of staff by type of employment.

Table 7.5 Number of staff working in early years services by type of employment

	Community	Private	Total	% of total staff
Number of services	**1,068**	**2,860**	**3,928**	**N/A**
Directly-employed staff	**7,436**	**15,813**	**23,249**	**92.0%**
Staff on schemes/programmes	**1,902**	**111**	**2,013**	**8.0%**
CE – Community Employment	*1,502*		*1,502*	***6.0%***
CSP – Community Services Programme	*169*		*169*	***0.7%***
JI – Job Initiative Scheme	*53*		*53*	***0.2%***
Tús	*161*		*161*	***0.6%***
Other	*17*	*111*	*128*	***0.5%***
Total staff	**9,338**	**15,924**	**25,262**	

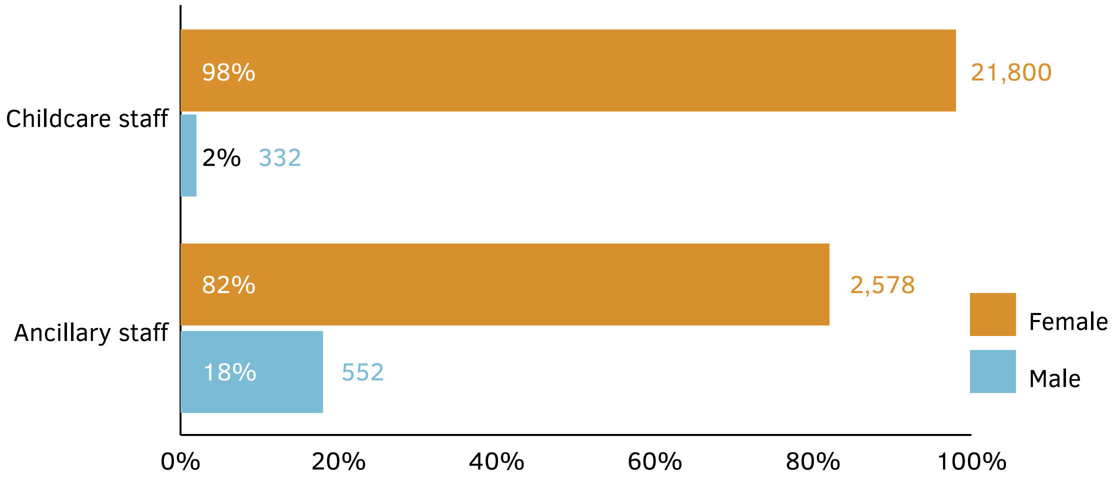
42 According to CSO data, 20% of people in employment worked part-time at the end of Q2 2018 https://www.cso.ie/en/releasesandpublications/er/lfs/labourforcesurveyquarter22018/.

43 The data in the table includes personnel who are on employment schemes and government-funded programmes.

7.4 Gender

Like previous years, staff who worked directly with children were almost exclusively female (98%) in 2017/18. Amongst ancillary staff, the proportion of women was lower, at 82% (Figure 7.3). The gender balance of staff working with children and those in ancillary roles remained the same as last year.

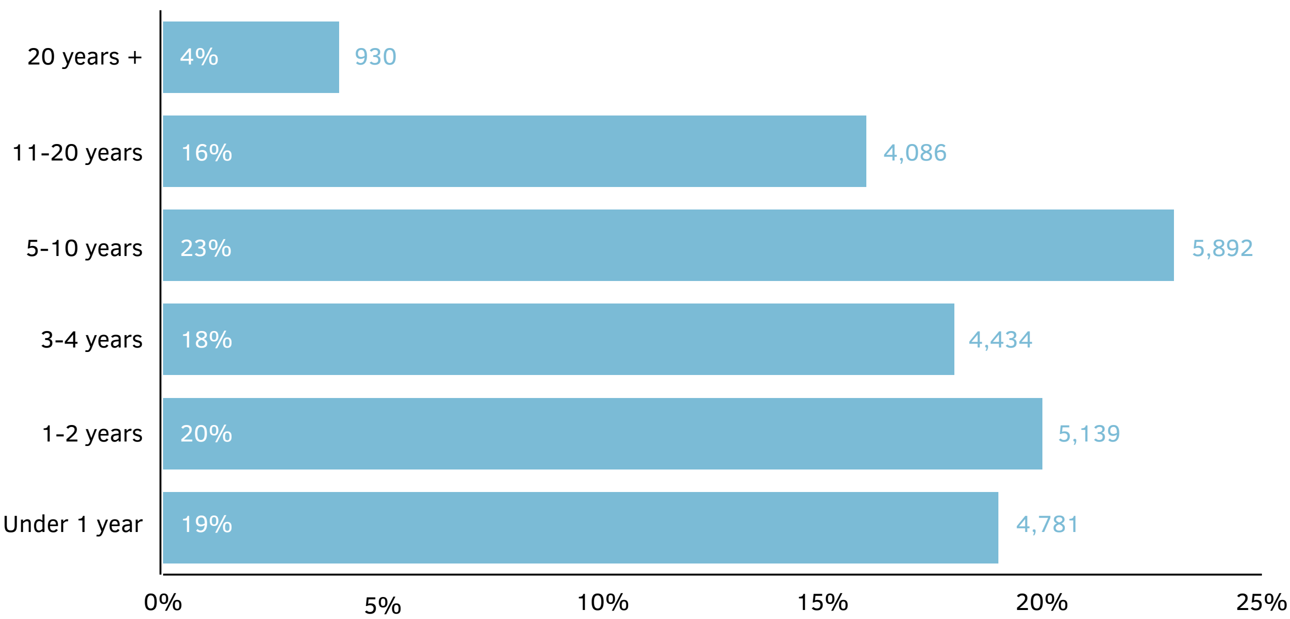
Figure 7.3 Gender breakdown of all staff working in early years services



7.5 Length of time in service

Respondents were asked to indicate how long each staff member had worked in their current service. This question was asked for all staff working in the service, including ancillary staff. As shown in Figure 7.4, majority of employees (57%) had been in their current service for less than five years. Only 20% of staff were in their current service for over ten years. This is up by two percentage points on the corresponding figure for last year.

Figure 7.4 Breakdown of staff by length of time in current service



The length of employment in a service is broadly similar across urban and rural locations (for a detailed breakdown see Table 7.6). This was also the case in 2016/17. More pronounced differences in the length of staff employment in the service were observed between community and private services. On average, staff in community services have been working for longer in the service than their counterparts in private facilities. For example, almost half of staff in community settings (48%) have worked there for five years or more, compared to 41% of staff in private services.

Table 7.6 Breakdown of staff by length of time in current service by organisation type and urban/rural

	Community	Private	Urban*	Rural*	Total
Number of staff	**9,338**	**15,924**	**18,063**	**7,184**	**25,262**
Under 1 year	17%	20%	19%	18%	**19%**
1-2 years	19%	21%	21%	20%	**20%**
3-4 years	16%	18%	18%	17%	**18%**
5-10 years	26%	23%	22%	24%	**23%**
11-20 years	19%	14%	16%	17%	**16%**
20 years +	3%	4%	4%	4%	**4%**

*Five services (with 15 staff) could not be geo-coded and do not have an urban/rural classification.

7.6 Length of time working in the early years sector

Respondents also provided data on the length of time that staff had been working in the early years sector. This was asked only for staff working directly with children. The data, shown in Figure 7.5, indicates that there is inter-service mobility within the sector, as personnel move from one service to another. Among all childcare staff, just 6% were new entrants (i.e. they entered the sector within the past year). However, 19% of staff were with their current service for less than one year. At the other end of the spectrum, 31% of staff were in the childcare sector for over ten years, with 8% of staff having over twenty years of experience. These figures are similar to those recorded in previous years.

Figure 7.5 Staff working directly with children by length of time in current service and the early years sector

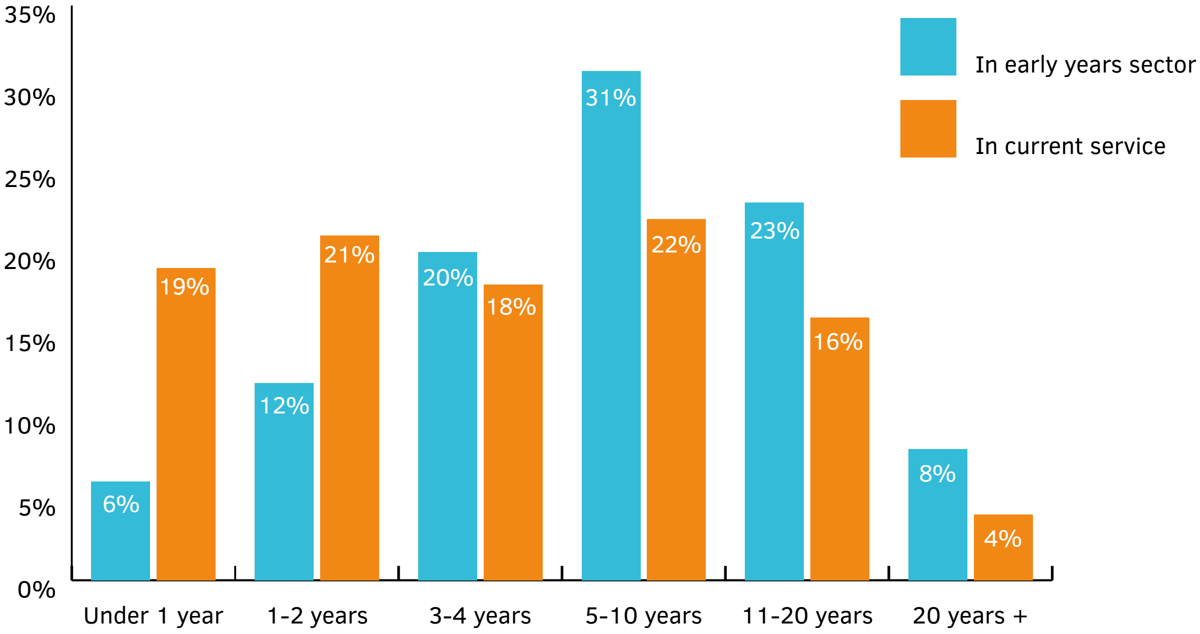


Table 7.7 presents the community/private and urban/rural breakdown of staff and the length of time that they have worked in the early years sector. Length of employment in the sector has not been visibly affected by the location or type of service staff are employed in. New entrants to the sector (under 1 year) are slightly more likely to work in community services (6%) than private ones (5%).

Table 7.7 Breakdown of staff working directly with children by length of time working in the early years sector, by organisation type and urban/rural

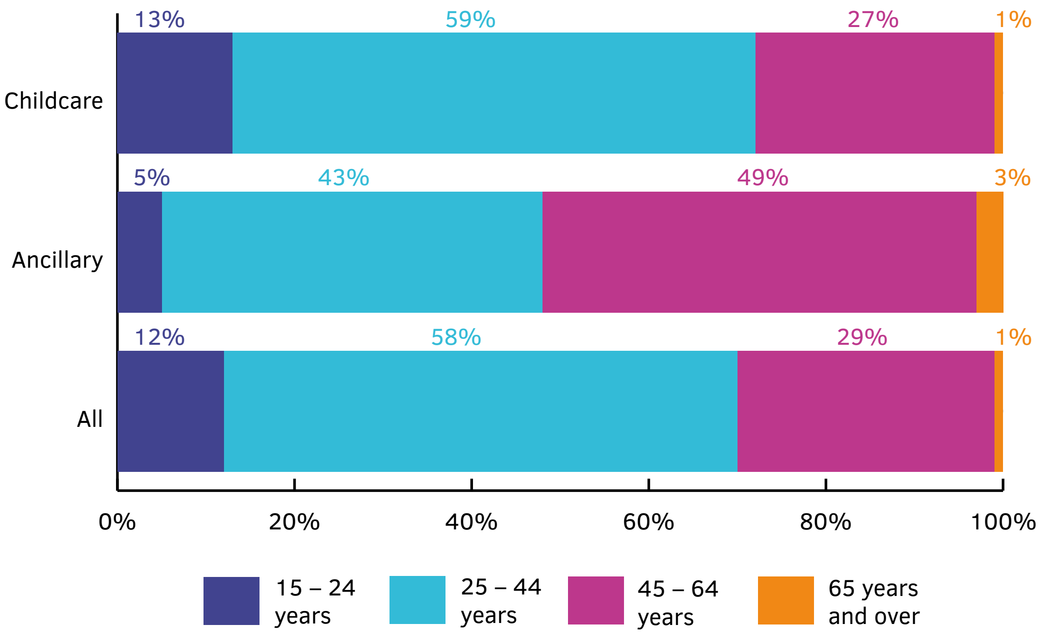
	Community	Private	Urban*	Rural*	Total
Number of staff	**7,780**	**14,352**	**15,742**	**6,377**	**22,132**
Under 1 year	6%	5%	6%	5%	**6%**
1-2 years	13%	12%	13%	12%	**12%**
3-4 years	18%	21%	21%	19%	**20%**
5-10 years	30%	32%	31%	32%	**31%**
11-20 years	26%	22%	22%	25%	**23%**
20 years +	7%	8%	7%	7%	**8%**

*Five services (with 15 staff) could not be geo-coded and do not have an urban/rural classification.

7.7 Age profile of staff

Respondents were asked to indicate an age band for each staff member. Figure 7.6 presents the age profile of staff, including a breakdown for ancillary staff and those working with children. This has changed very little in recent years. Over half of all staff (58%) are aged 25 to 44 years and 70% are aged under 45 years. The ancillary staff are on average older than staff working with children, with over half (52%) being aged 45 years and over compared to 28% of staff working with children.

Figure 7.6 Percentage of staff working in the early years sector by age



The community/private and urban/rural breakdown of the age profile of staff is very similar to that recorded for 2016/17. Private facilities have a slightly younger staff profile, with 72% of their staff aged under 45 compared to 63% in community facilities. Urban and rural differences in respect of age profile are minor (see Table 7.8 for details). Rural services have a slightly higher proportion of staff aged 45 and older (34%), while across urban services the corresponding figure is 29%.

Table 7.8 Number and percentage of staff by age cohort, organisation type and urban/rural.

	Community	Private	Urban*	Rural*	Total
Number of staff	**9,338**	**15,924**	**18,063**	**7,184**	**25,262**
15 – 24 years	9%	13%	13%	10%	**12%**
25 – 44 years	54%	59%	58%	56%	**58%**
45 – 64 years	36%	27%	28%	33%	**29%**
65 years and over	1%	1%	1%	1%	**1%**

*Five services (with 15 staff) could not be geo-coded and do not have an urban/rural classification.

7.8 Job titles

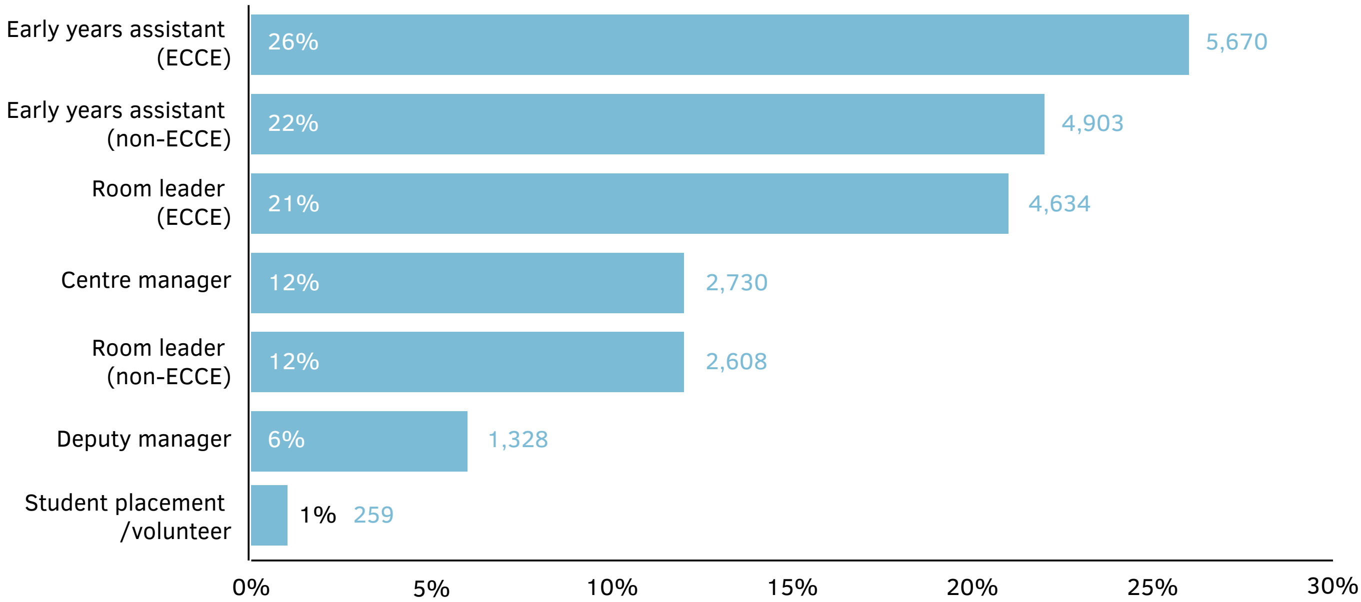
The survey sought information on job titles for individual staff members. Respondents were given a list of job titles and were asked to select the most appropriate one in each case. Given the different nature of the work performed by childcare staff and ancillary staff, two separate lists were provided and the results are presented separately.

7.8.1 Childcare staff

In any childcare setting, staff generally perform multiple roles and often work with children of different ages. Therefore, survey respondents were advised to select the job title that offered the best fit in respect of each staff member.

Almost half of all staff (47%) work primarily with ECCE children, with 26% as early years assistants and 21% as room leaders. The corresponding figures for staff working with non-ECCE children are 22% as early years assistants and 12% as room leaders. A further 18% of staff work primarily as centre managers or deputy managers. Figure 7.7 presents the numbers and percentages of staff by job title.

Figure 7.7 Staff working directly with children by job title

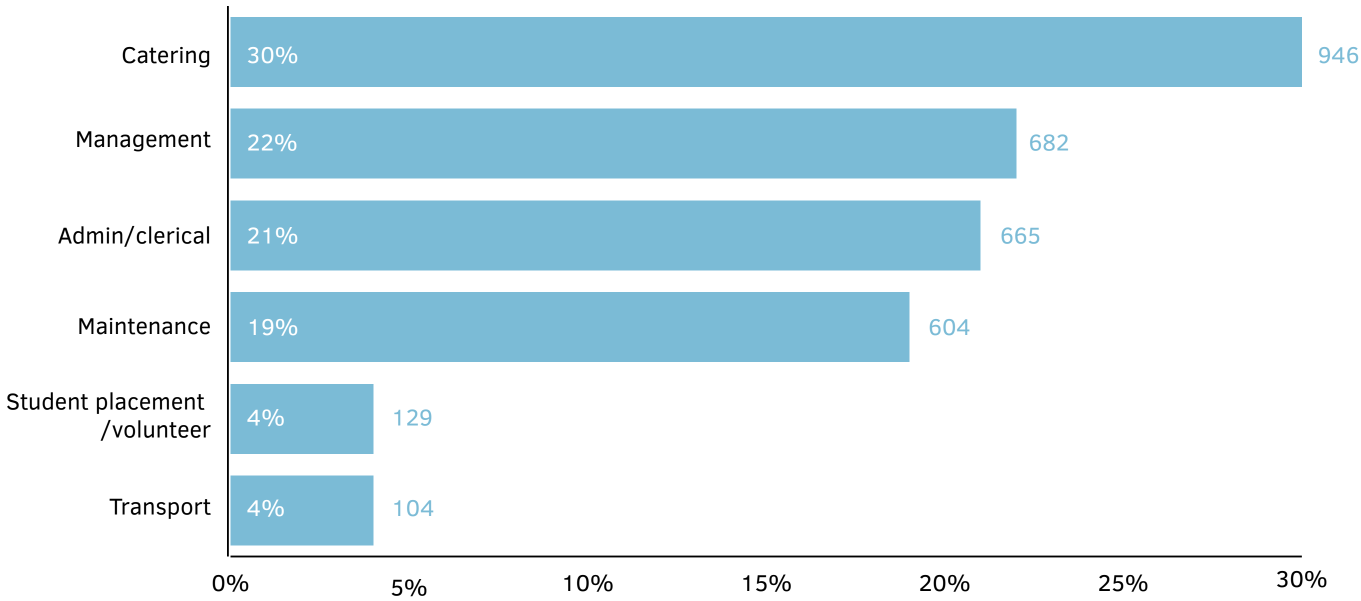


7.8.2 Ancillary staff

As has been the case in previous years, catering staff account for the single biggest cohort among ancillary staff. They represent 30% of non-childcare staff. Those working mainly in management and administration account for a further 43%. Figure 7.8 presents the numbers and percentages of ancillary staff[44] by their job titles.

44 Comparisons with 2016/17 are not advisable, as this year's survey profile embeds relief staff within the categories presented in Figure 7.8. Last year, relief staff were shown separately, and they accounted then for 10% of ancillary staff members.

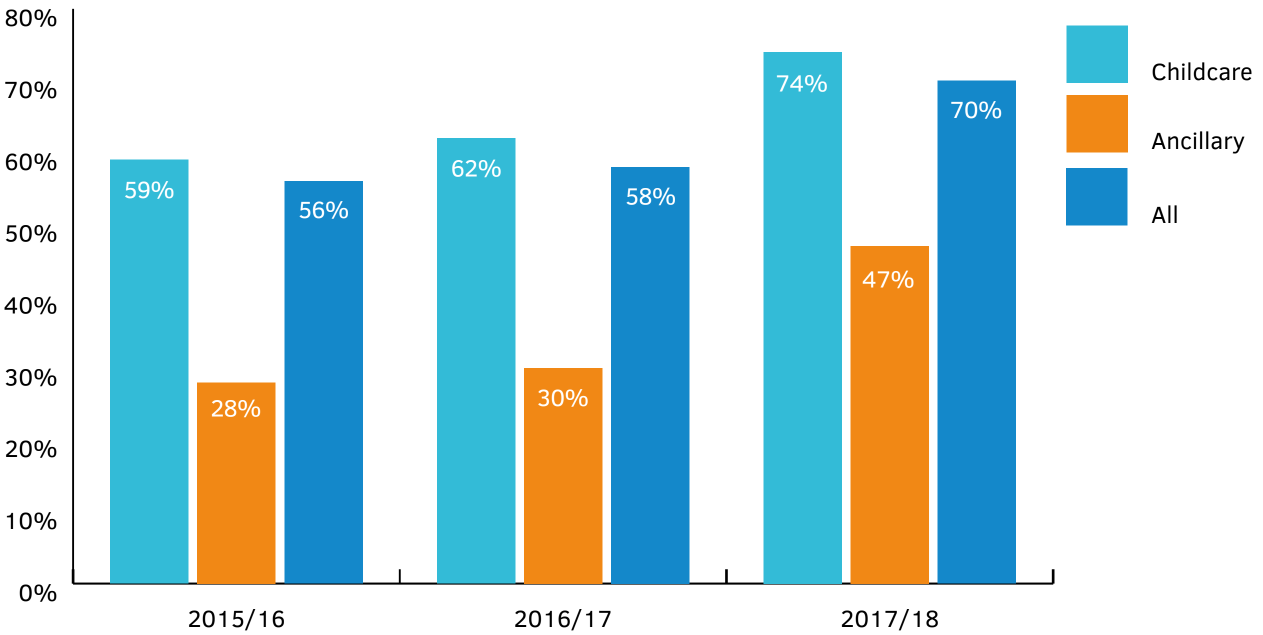
Figure 7.8 Ancillary staff by job title



7.9 Children First training

Survey respondents were asked to indicate whether individual staff members had completed Children First[45] training in the last three years. As Figure 7.9 shows, the proportion of staff who have completed this training has increased, particularly over the past year. The proportion of all staff with this training now stands at 70%. This proportion is higher for childcare staff (74%) than ancillary staff (47%). Compared to last year, the share of ancillary staff who completed Children First training increased significantly – by 17%.

Figure 7.9 Percentage of staff who received Children First training



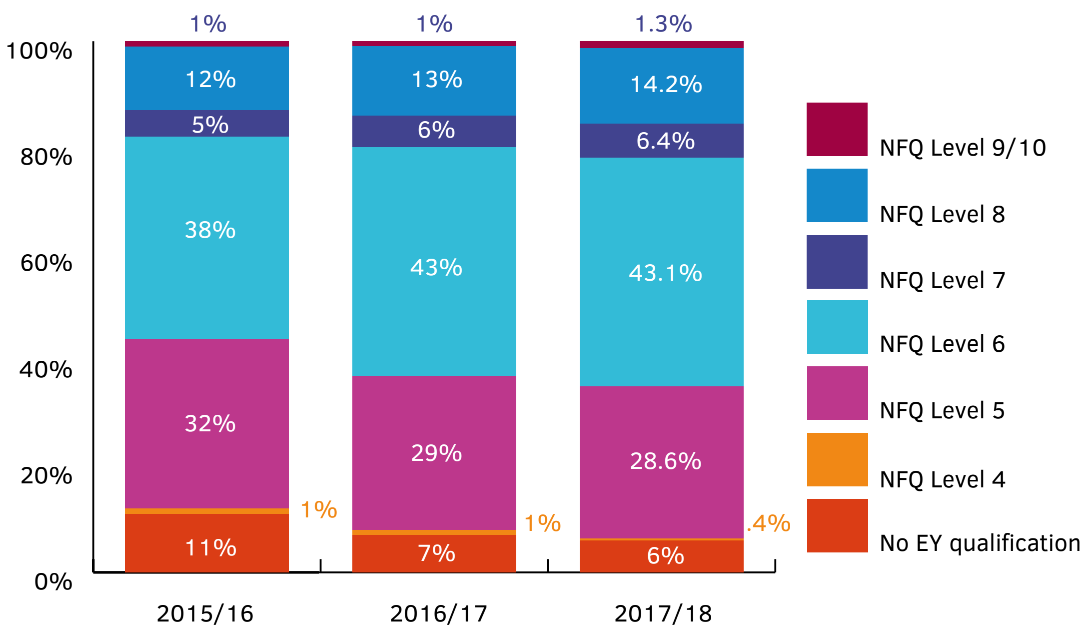
45 *Children First* refers to the *National Guidance for the Protection and Welfare of Children*. It is governed by the Children First Act, 2015. The Act provides for making further and better provision for the care and protection of children. Services involved in the care of children have a responsibility to provide training in this area, on an on-going basis.

7.10 Early years staff qualifications

7.10.1 Staff highest qualifications

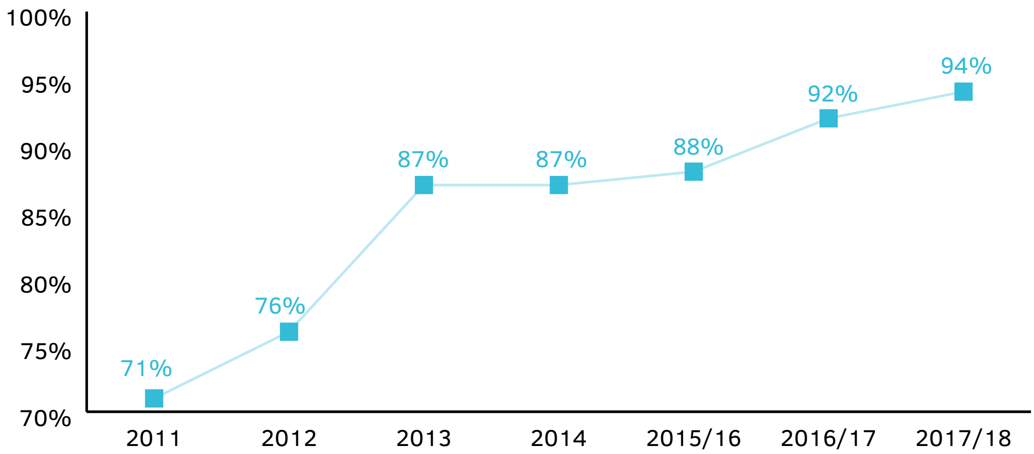
Survey respondents provided details of qualifications only for staff working with children. In 2017/18, staff qualification levels in the sector continued to increase following the trend observed in recent years. The total number of personnel with qualifications at NFQ Level 5 or higher was reported at 20,698, which represents 94% of all staff working directly with children. This marks an increase on 92% recorded in 2016/17 and 88% from the year before. The proportion of staff with a qualification at NFQ Level 6 or higher was 65% (14,388). This was up from 63% last year and 56% in the previous year. The overall proportion of staff with no formal childcare qualifications continued to fall and now stands at 6%, compared to 7% last year and 11% in 2015/16. The year-on-year changes in respect of staff qualifications are presented in Figure 7.10.

Figure 7.10 Staff working directly with children – percentage by highest level of qualification in 2015/16, 2016/17 and 2017/18



Under the Childcare (Early Years Services) Regulations Act (2016), all staff working directly with children must hold a minimum of a NFQ Level 5 qualification, as of December 31st 2016. The legislation exempts those who signed the so-called Grandfather Declaration (as discussed in Section 7.10.4). The introduction of the legislation continues to have an impact on the level of staff qualifications, as the proportion of staff with an NFQ Level 5 qualification or above has continuously risen (see Figure 7.11).

Figure 7.11 Percentage of staff who have NFQ Level 5 qualification or above (from 2011 to 2017/18)



Note: This figure includes staff who are on employment schemes and other labour market initiatives. When the staff who are on employment schemes and other labour market initiatives are excluded, the proportion of staff (directly-employed) with NFQ Level 5 qualification or higher is 96%.

Table 7.9 provides further details regarding staff qualifications. On average, staff in private services have higher qualifications. Over two thirds of staff in private services (69%) have a NFQ Level 6 qualification or above, compared to 57% of staff in community services. This difference may be associated with community services' higher levels of staff who are on employment schemes or government funded programmes. 18% of staff on employment schemes/programmes have a NFQ Level 6 or higher, in comparison to 67% of direct employees.

Table 7.9 Staff working directly with children – number and percentage by highest level of qualification

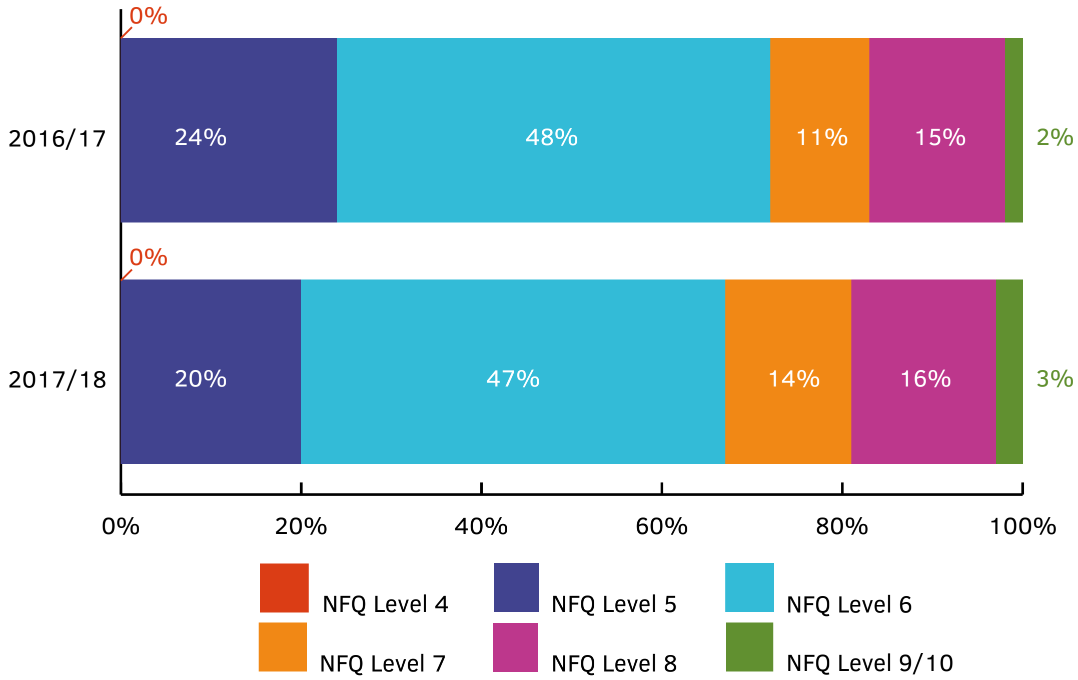
	Community		Private		All	
Qualification level	Number of staff	% of staff	Number of staff	% of staff	Number of staff	% of staff
Total staff	**7,780**	**35%**	**14,352**	**65%**	**22,132**	**100%**
NFQ Level 5 or above	6,870	88%	13,828	96%	20,698	**94%**
NFQ Level 6 or above	4,444	57%	9,944	69%	14,388	**65%**
No childcare qualification	849	10.9%	489	3.4%	1,338	**6.0%**
NFQ Level 4 Award	61	0.8%	35	0.2%	96	**0.4%**
NFQ Level 5 Award	2,426	31.2%	3,884	27.1%	6,310	**28.6%**
NFQ Level 6 Award	3,160	40.6%	6,373	44.4%	9,533	**43.1%**
NFQ Level 7 Award (Ordinary Degree)	336	4.3%	1,072	7.5%	1,408	**6.4%**
NFQ Level 8 Award (Honours Degree)	856	11.0%	2,295	16.0%	3,151	**14.2%**
NFQ Level 9/10 Award (Masters/PhD)	92	1.2%	204	1.4%	296	**1.3%**

Appendix VI presents the breakdown of qualifications of staff working directly with children by urban/rural location. There are no major differences between staff qualifications in urban and rural areas.

7.10.2 Early years qualifications in process

The survey asked respondents to provide details regarding childcare staff who were in the process of acquiring qualifications. The responses provide a profile of the qualifications expected to come on stream within the sector. At the time of the survey, 3,783 people, representing 17% of staff working directly with children, were in the process of acquiring a qualification. Figure 7.12 compares the levels of qualifications sought in 2016/17 and 2017/18. The majority of staff studying for higher qualifications sought to obtain an award at NFQ Level 6 or higher.

Figure 7.12 Staff working directly with children – level of early years qualification in process of attaining[46]



46 Figures are inclusive of relief staff.

7.10.3 Staff with no qualifications

In order to establish the number of staff who are neither qualified nor in the process of qualifying, further analysis and cross-referencing were required. Firstly, the number of persons who were not qualified to NFQ Level 5 was established (1,434). Then, staff who belonged to any of the following categories were removed: student and volunteer placements; those who had signed a Grandfather Declaration[47]; and those in the process of obtaining a NFQ Level 5 or above. As a result, a total of 309 childcare staff (1.4%) were identified as not yet qualified and not in the process of qualifying, as of May 2018 (compared to 1.7% in May 2017).

7.10.4 Signed Grandfather Declaration

As noted earlier, regulations introduced in 2016 require all staff members working directly with children to have a minimum relevant qualification of NFQ Level 5. The exception to this requirement are any staff members who have signed a ‘Grandfather Declaration’. This declaration states their intention to retire or resign before the 1st September 2021. Services reported 1,098 staff members who have signed the declaration. This represents 5% of all staff – the same proportion as recorded in 2016/17.

Table 7.10 presents a county breakdown of staff who have signed a Grandfather Declaration. At 10%, Monaghan had the highest proportion of staff who signed a ‘Grandfather Declaration’, while Sligo had the lowest at 1%.

47 For details regarding Grandfather Declarations, see Section 7.10.4.

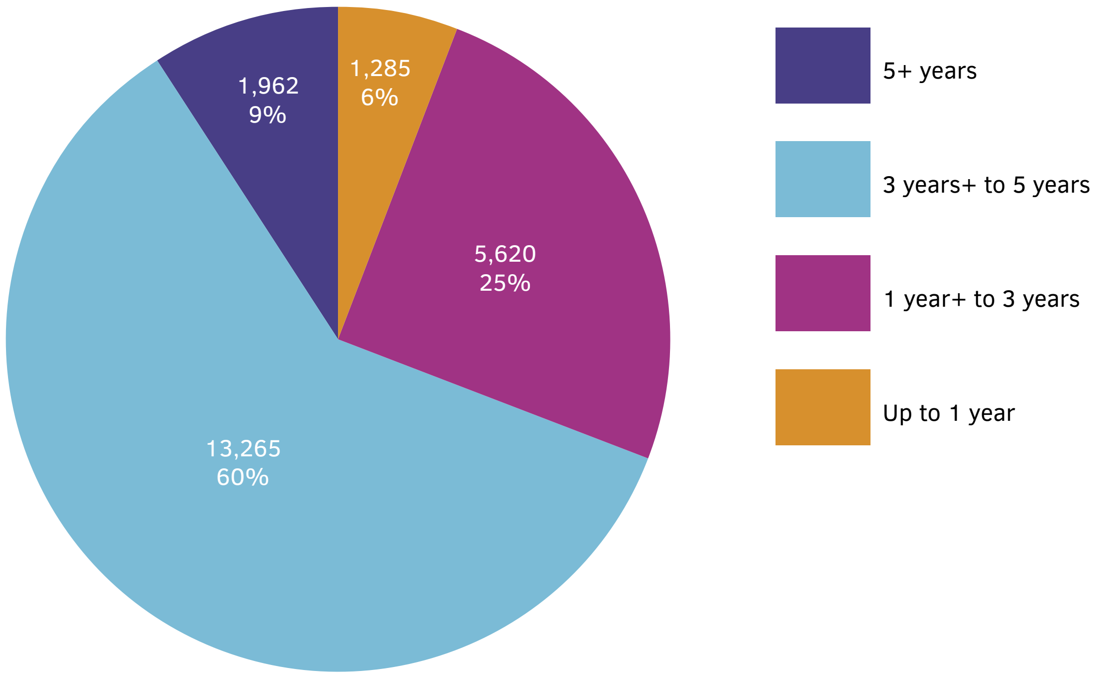
Table 7.10 Staff working directly with children who have signed a Grandfather Declaration

		Staff with signed Grandfather Declaration	
	Total number of staff	Number	%
Carlow	266	10	4%
Cavan	396	26	7%
Clare	542	37	7%
Cork City	578	22	4%
Cork County	1,730	64	4%
Donegal	792	38	5%
Dublin – Dublin City	2,477	137	6%
Dublin – Dún Laoghaire-Rathdown	944	40	4%
Dublin – Fingal	1,422	61	4%
Dublin – South Dublin	1,285	56	4%
Galway	1,226	51	4%
Kerry	693	23	3%
Kildare	973	46	5%
Kilkenny	476	11	2%
Laois	421	30	7%
Leitrim	191	7	4%
Limerick	939	63	7%
Longford	244	6	2%
Louth	568	47	8%
Mayo	538	25	5%
Meath	878	70	8%
Monaghan	463	44	10%
Offaly	322	16	5%
Roscommon	295	27	9%
Sligo	438	6	1%
Tipperary	786	44	6%
Waterford	538	19	4%
Westmeath	475	21	4%
Wexford	705	28	4%
Wicklow	531	23	4%
Total	**22,132**	**1,098**	**5%**

7.11 Age range of children catered for

The survey gathered data on the age range of children with whom each staff member primarily works. As would be expected from the age breakdown of children enrolled in early years services, the majority of staff (60%) work primarily with children aged 3+ to 5 years. The smallest proportion of staff (6%) works with babies. Figure 7.13 presents a breakdown of childcare staff by age range of children worked with. This breakdown is very similar to that of 2016/17.

Figure 7.13 Staff working directly with children – by age range of children worked with



This question allowed for an analysis of the qualification levels of the staff assigned to each age cohort. Table 7.11 presents the qualifications of staff depending on the age group they primarily work with. It shows that:

- The most qualified personnel are more likely to be working with children aged up to 5 years, particularly those aged 3+ to 5 years.
- Children aged 3+ to 5 years are twice as likely as other age groups to be cared for by a staff member with a NFQ Level 8 or higher.
- One in five staff working with pre-school children (those aged 3+ to 5 years) has a NFQ Level 8 or 9 qualification compared to one in nine working with school age children.
- Staff working in school age childcare tend to have the lowest qualification levels, with 22% not having any formal childcare qualification, although 61% have either a NFQ Level 5 or 6 award.

The patterns in respect of the qualification levels of staff working with particular ages of children are very similar to those observed in last year's survey.

Table 7.11 Staff working directly with children by highest level of qualification attained and age range of children worked with

	Up to 1 year	1 year+ to 3 years	3 years+ to 5 years	5+ years	Totals by age range
Total number of staff by age range	**1,285**	**5,620**	**13,265**	**1,962**	**22,132**
NFQ Level 5 or above	93%	94%	96%	76%	**94%**
No childcare qualification	6.7%	6.0%	3.6%	22.3%	**6.0%**
NFQ Level 4 Award	0.5%	0.5%	0.3%	1.3%	**0.4%**
NFQ Level 5 Award	40.2%	40.5%	22.0%	29.8%	**28.6%**
NFQ Level 6 Award	39.7%	41.0%	46.1%	30.6%	**43.1%**
NFQ Level 7 Award	3.5%	3.0%	8.2%	5.5%	**6.4%**
NFQ Level 8 Award	9.0%	8.5%	18.0%	9.0%	**14.2%**
NFQ Level 9/10 Award	0.4%	0.5%	1.8%	1.5%	**1.3%**

7.12 Wages

7.12.1 Methodology

The survey sought information on the wages of staff who work directly with children[48]. As part of the data cleaning process, student placements/volunteers and those receiving nominal wages were excluded. Thus, only staff in receipt of more than €1 per hour were included in the analysis. Staff on the various labour market schemes were included to provide a complete picture of wages across the sector. As many childcare providers are self-employed, and may not pay themselves a standard or regular wage, the survey instructions included specific advice for them. Services were asked to calculate their hourly rate based on the gross earnings for the previous month. This data also includes relief staff, as it is likely that they may receive different wages in the different services that they provide the cover for.

The cleaned data was used to perform a multivariate analysis, more specifically a machine learning technique known as a regression tree. This analysis identified variables (factors) that have the strongest influence on staff wages. Having identified the most significant drivers, the next step was to undertake a univariate analysis for each of them.

7.12.2 Wages overall

The average hourly wage of staff working in the early years sector is €12.17. This is the average wage based on the data for the 22,991 staff members who work directly with children and relief/cover staff. The average wage increased by 24 cent or 2% on the previous year (€11.93 in 2016/17).

This overall national figure is determined by a range of variables, of which the top five are analysed in subsequent sections. As in 2016/17, job title has the single

48 Ancillary staff were not covered by the questions relating to wages.

biggest influence on wages. This is followed by length of tenure in the early years sector (second factor) and time worked in the service (third factor). Qualification is the fourth most significant determinant, while county is the fifth. Table 7.12 presents all factors analysed, in descending order, based on their impact on wages.

Table 7.12 Variables affecting wages in the early years sector

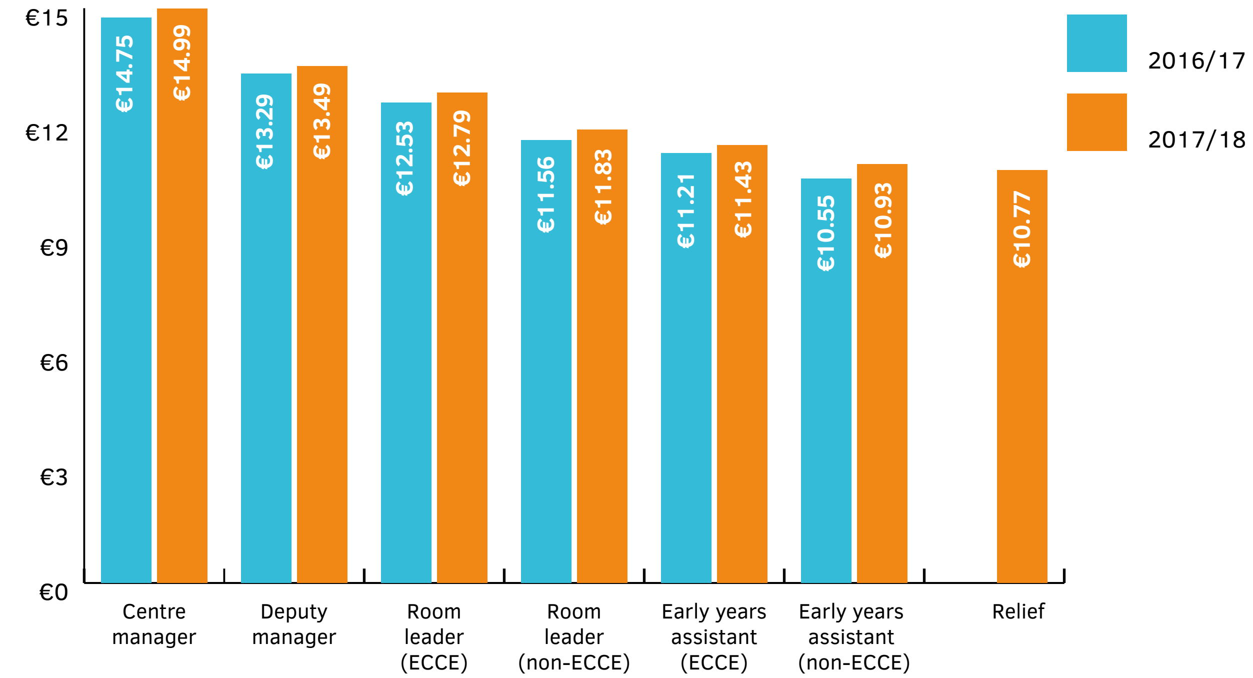
	% influence on wages	
Variable	2016/17 data	2017/18 data
Staff position/job title	21.5%	28.2%
Length of time working in early years sector	8.5%	11.6%
Length of time in service	10.0%	10.9%
Highest qualification attained	8.8%	10.0%
County	15.7%	9.7%
Non-contact hours per week	9.3%	9.4%
Hours contracted to work per week	6.2%	3.5%
Category of children cared for	4.2%	3.2%
Facility type (community/private)	3.2%	3.0%
Age band	3.3%	2.9%
Deprivation index (Electoral District)	<1%	2.3%
Urban/rural (CSO May 2018)	<1%	2.2%
On seasonal contract	1.5%	1.5%
Employment category	3.5%	1.2%
Other variables of negligible influence	2.4%	<1%

7.12.3 Staff position/job title

For the first time this year, the survey gathered data on relief staff working with children. For the majority of staff characteristics, relief staff were excluded from analysis due to potential double reporting of the same person by multiple services. However, relief staff were included in the wages analysis as it is likely they may be paid different wages in different services. The average hourly rate for relief staff was €10.77, and was the lowest amongst the different staff positions.

As was the case in 2016/17, staff position/job title is the greatest predictor of wages. In general, staff in management and leadership roles earn the highest hourly wage with centre managers earning €14.99 and deputy managers €13.49. These are followed by room leaders (both ECCE and non-ECCE) at an average hourly wage of €12.44. The average hourly rate for early years assistants (both ECCE and non-ECCE), who constitute 48% of all staff working with children is €11.20 per hour, 70c below the living wage for Ireland in 2018. Relief staff are paid the lowest hourly wage, at €10.77. Figure 7.14 compares the average hourly earnings of staff depending on their job title between 2016/17 and 2017/18. Wages have increased across all staff positions, with rates of increase ranging from 1.5% for deputy managers to 3.6% for early years assistants (non-ECCE).

Figure 7.14 Staff working directly with children – average hourly wage by job title



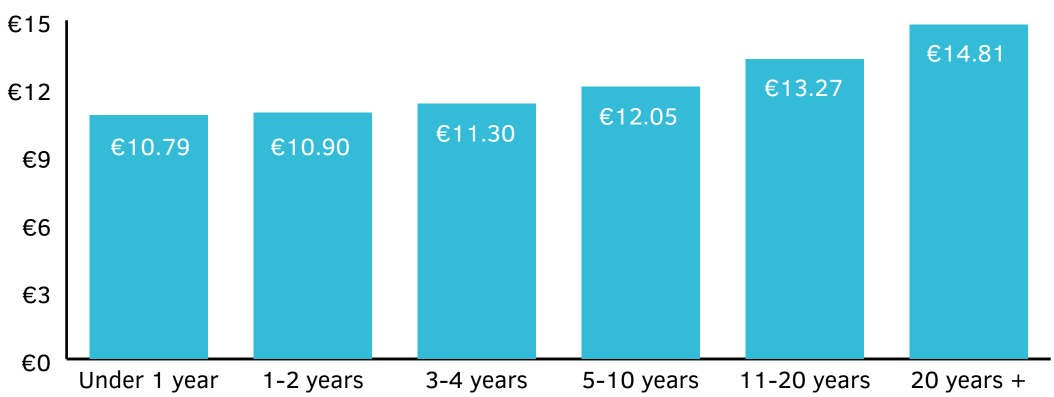
Note: Relief staff members were not included in the 2016/17 survey.

In Ireland, the living wage for 2018 was set at €11.90. According to its advocates, the living wage refers to the level of earnings that makes possible a minimum acceptable standard of living[49]. Non-ECCE room leaders, early years assistants (both ECCE and non-ECCE) and relief staff earned, on average, below the 2018 living wage rate.

7.12.4 Length of time working in early years sector

The length of time staff worked in the early years sector, which reflects experience, had the second highest influence on the level of wages. Figure 7.15 shows the average hourly wage depending on the length of time in the sector. As would be expected, the longer staff worked in the sector, the higher the hourly wage they earned. Those working in the sector under one year earned €10.79 per hour and those with 20 years experience or more earned €14.81 per hour, on average. Those working in the sector for less than five years earned on average below the living wage for 2018.

Figure 7.15 Average hourly wage rate by length of service in the early years sector

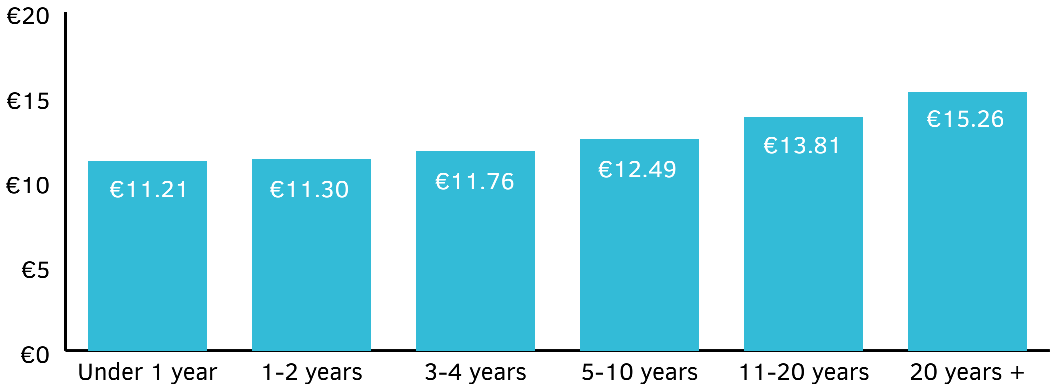


49 For information about the living wage, see www.livingwage.ie.

7.12.5 Length of time in service

The survey data also shows a relationship between staff wages and the length of time staff are working in their current service (see Figure 7.16). The average hourly wage for those working over 20 years in a service is €15.26, while the rate for those with less than one year's tenure in a service is €11.21 – a difference of €4.05 or 27%.

Figure 7.16 Staff working directly with children – average hourly wage by length of time in current service



7.12.6 Highest qualification attained

Staff qualification levels also have an influence on the level of wages. Figure 7.17 presents the average hourly wage for different levels of qualifications. Those with the highest qualifications (NFQ Level 9 or 10) also earn the highest wages (€14.59 per hour), while those with NFQ Level 5 qualifications earn the least – €11.21 per hour. The relationship between wages and qualifications is not linear. While newer staff are likely to have higher qualifications, they also have less experience and therefore are likely to earn less than those working longer in the sector. For example, those with NFQ Level 7 earn, on average, more than those who have NFQ Level 8, and those with NFQ Level 4 fare better than those who have NFQ Level 5. These anomalies in respect of the overall relationship between qualifications and wages were also observed between qualifications and wages in 2016/17. This indicates that while qualifications are a driver of wages, their importance is not as significant as staff position and length of time in the sector (see Table 7.12).

Figure 7.17 Staff working directly with children – average hourly wage by highest level of qualification attained

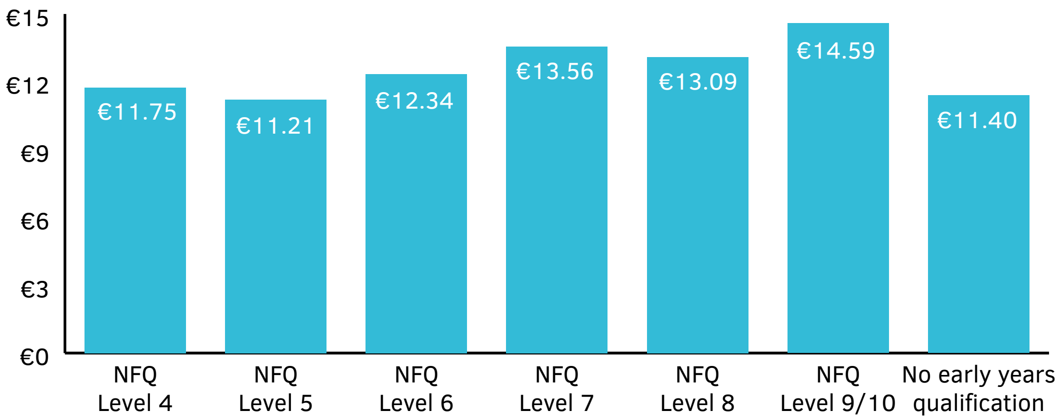


Table 7.13 provides a detailed breakdown of staff wages combining staff position with the level of qualifications. Please note, some of the staff categories outlined below have very few staff and therefore averages may be impacted by factors that have much stronger influence on the wages than qualifications. An example of this is deputy managers qualified to NFQ Level 4 – there were only four staff in this category and most of them had worked in the sector for more than 10 years.

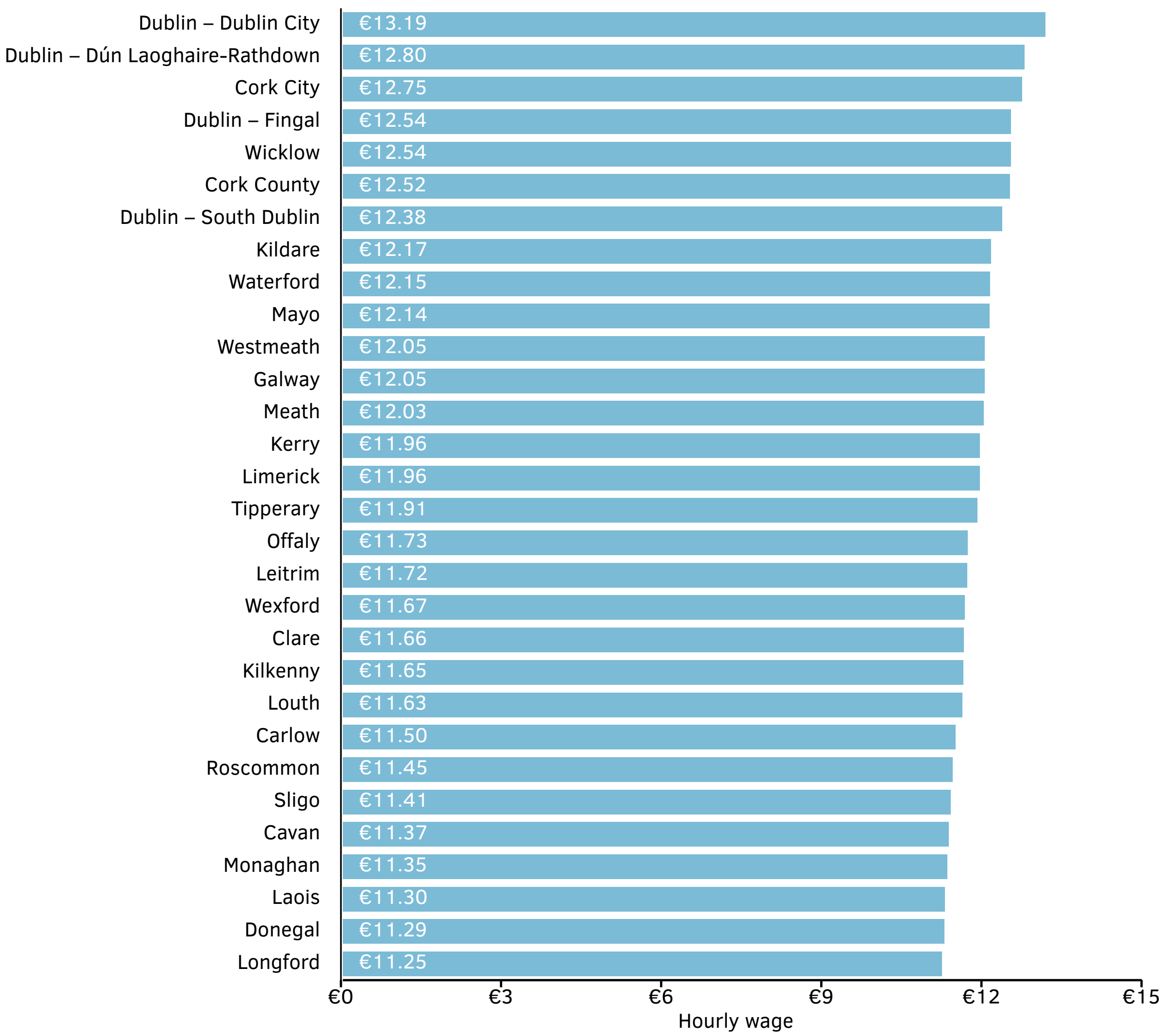
Table 7.13 Staff working directly with children – average hourly wage by job title and highest level of qualification attained

	NFQ Level 4	NFQ Level 5	NFQ Level 6	NFQ Level 7	NFQ Level 8	NFQ Level 9/10	No early years qualification	Total
Centre manager	€13.50	€13.86	€14.81	€15.07	€15.48	€17.00	€15.43	**€14.99**
Deputy manager	€17.42	€12.63	€13.33	€14.65	€14.24	€14.31	€12.72	**€13.49**
Early years assistant (ECCE)	€11.58	€11.30	€11.56	€11.60	€11.63	€11.75	€11.22	**€11.43**
Early years assistant (non-ECCE)	€10.76	€10.73	€10.98	€11.90	€11.28	€17.60	€11.02	**€10.93**
Relief	€11.06	€10.58	€10.90	€10.66	€11.32	€8.51	€10.87	**€10.77**
Room leader (ECCE)	€10.00	€11.69	€12.53	€13.69	€12.94	€13.29	€12.33	**€12.79**
Room leader (non-ECCE)	€16.15	€11.44	€11.86	€12.33	€12.51	€13.37	€11.87	**€11.83**
Total	**€11.75**	**€11.21**	**€12.34**	**€13.56**	**€13.09**	**€14.59**	**€11.40**	**€12.17**

7.12.7 County

The overall significance of county as a determinant of wages has reduced since 2016/17. The average hourly wages range from €11.25 per hour in Longford to €13.19 per hour in Dublin City. The overall geographical pattern is similar to that recorded for 2016/17 with the highest rates of pay recorded in the Greater Dublin Area, Cork and Wicklow and the lowest rates in the Border Region. Figure 7.18 presents the breakdown of average wages of childcare staff by county.

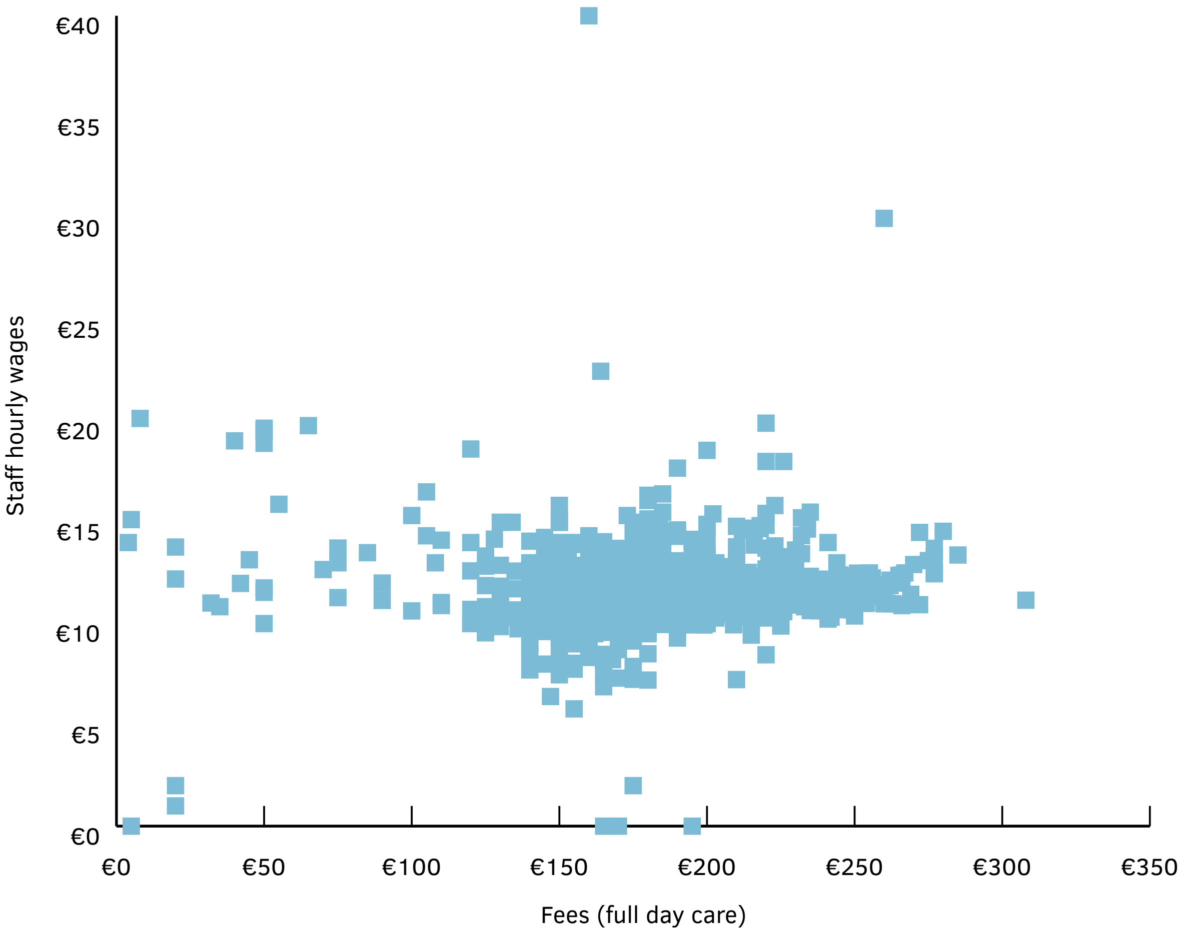
Figure 7.18 Average hourly wage by county



7.12.8 Wages and fees

An analysis was also undertaken to determine if there is any relationship between wages paid to staff and the fees charged to service users. This involved plotting the full day care fees against staff wages. The result is presented in Figure 7.19. As was the case in 2016/17, the analysis shows that there is no relationship between fees and wages as such a relationship would be visible through a linear pattern.

Figure 7.19 Scatterplot to test for any relationship between fees and wages



7.13 Staff turnover

The analysis presented in Section 7.6 suggests considerable levels of inter-service mobility or staff turnover. An analysis was undertaken to identify the rate of staff turnover in childcare services. The methodology used to establish the turnover rate for each facility involved factoring out any possible reduction or expansion in staff numbers. Four data types were used to calculate turnover:

- number of staff working in the service;
- number of staff who left in the past twelve months;
- number of staff working in the facility who had been there for less than twelve months; and
- number of staff vacancies at the time of completing the survey.

Where a staff member had left and there was a corresponding new staff member or vacancy, this was counted towards the turnover rate. However, if the number of staff recruited was higher than the number who left, the number who left was counted, so as not to confuse turnover with expansion. The methodology only included new entrants who were working in the service at the time of the survey, rather than the total number who began that year. While it is possible that the turnover rate may be underestimated due to a small number of staff who both left and re-joined a service within the past twelve months, and who are therefore not captured in the calculations, the methodology is aligned with that employed in other similar research (Early Childhood Ireland, 2017).

In the twelve months up to May 2018, the annual staff turnover rate was 24.7%. This is down 3.5 percentage points on last year's figure of 28.2%. Table 7.14 shows the average rates of staff turnover by county. The highest rate was in Donegal (34%) and the lowest in Clare (18%).

Table 7.14 Average staff turnover rates per county

County	Average turnover rate
Donegal	33.7%
Leitrim	32.8%
Westmeath	32.1%
Dublin – Dún Laoghaire-Rathdown	29.7%
Cork City	28.9%
Sligo	28.6%
Kildare	27.6%
Dublin – Dublin City	26.9%
Galway	26.4%
Louth	26.3%
Cork County	25.4%
Monaghan	25.4%
Roscommon	25.1%
Offaly	24.8%
Limerick	24.5%
Kerry	24.4%
Tipperary	24.0%
Laois	23.7%
Wexford	23.0%
Dublin – Fingal	22.9%
Mayo	22.0%
Dublin – South Dublin	21.9%
Kilkenny	21.7%
Longford	21.6%
Meath	21.4%
Carlow	19.7%
Cavan	18.9%
Wicklow	18.8%
Waterford	18.4%
Clare	18.1%
Ireland (average)	**24.7%**

This year's survey included some new questions about staff retention and the destinations of the staff who leave employment in an early years service. As Table 7.15 shows, the majority of services (57%) retained all their staff during the twelve months up to the completion of the survey. The highest retention rates are in the private services and in rural areas. The survey responses also reveal that 23% of services lost one staff member, while 20% lost two or more staff members.

Table 7.15 Staff retention and loss by organisation type and urban/rural location

	Community	Private	Urban	Rural	All
Retained all staff	51%	59%	54%	62%	**57%**
Lost 1 staff member	27%	22%	23%	23%	**23%**
Lost 2 or 3	16%	13%	15%	11%	**14%**
Lost more than 3	6%	6%	8%	4%	**6%**

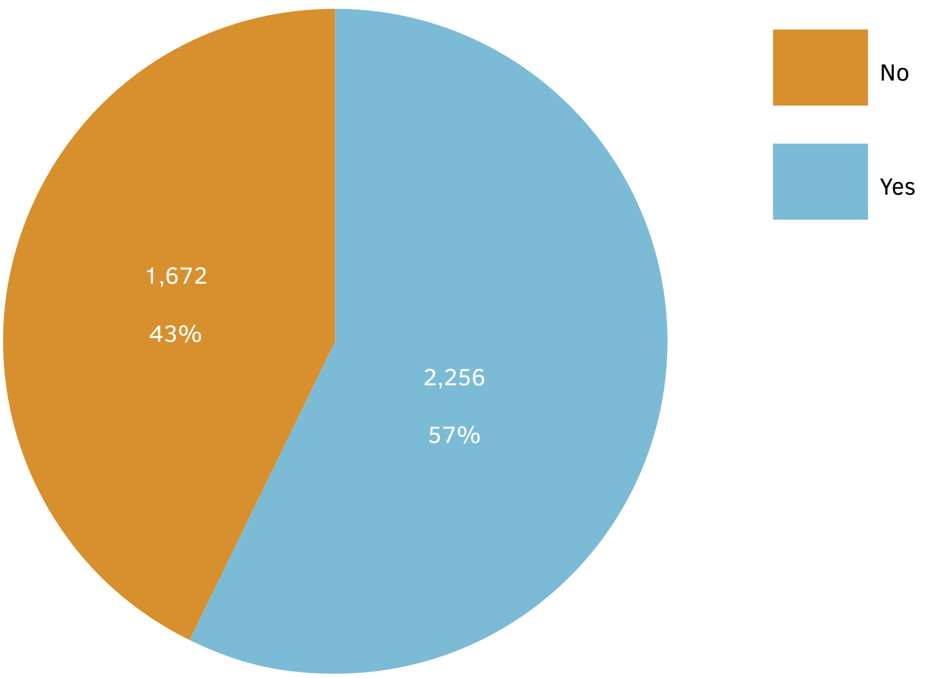
When asked about the destinations of staff who had left, respondents indicated that 36% had gone to another early years service while 43% had left the sector. The respondents were unsure of the destinations of the remaining 20%.

7.14 Staff vacancies

Of the 3,928 facilities that responded to the survey, 26% (1,005) reported having at least one staff vacancy. This is up from 21% in 2016/17. The majority of vacant positions were for part-time staff (59% or 1,036), with 728 positions available for full-time staff (41%).

Services were also asked if they had experienced challenges in recruiting suitably qualified staff over the past twelve months. More than half of services (57% or 2,256) experienced such challenges (see Figure 7.20). This is up 10% on 2016/17.

Figure 7.20 Services that experienced challenges in relation to recruiting suitably qualified staff in last twelve months



8

Child protection

Child protection

Almost 3 in 5 services

need further support & training in child protection

99%

Had a Designated Liaison Person and a Child Protection and Welfare Policy

70%

had staff who received Children First training, up 12% from last year

8.1 Introduction

Better Outcomes, Brighter Futures - The national policy framework for children and young people 2014 – 2020 includes an overarching goal (Goal 3) on child safety. Its aim is that all children and young people have a secure, stable and caring home environment; are safe from abuse, neglect and exploitation; are protected from bullying and discrimination; and are safe from crime and anti-social behaviour. The guidelines and best practice standards under which the early years sector operates represent one element in the attainment of this policy goal. These include *Children First: National Guidance for the Protection and Welfare of Children* (DCYA, 2011), which is the specific national policy in this area. One of the requirements is that each childcare service has in place, a Designated Liaison Person (DLP) for child protection. The DLP needs to be accessible to all staff, so that they can raise any concerns they may have regarding a child's welfare and protection. The DLP then takes the appropriate action. In addition, childcare providers are required to have in place a Child Protection Policy that sets out guidance and procedures for staff who may have concerns about the safety and welfare of children for whom they care. Staff, particularly those working directly with children, should also receive adequate training to allow them to recognise and understand the signs of abuse or neglect.

The service profile survey included questions relating to the aspects of child protection listed above. Table 8.1 presents the overall results in respect of the four main questions that were asked. These responses are discussed in more detail in following sections.

Table 8.1 Percentage of services with designated liaison person, written policy and staff trained in child protection

	Community	Private	All
% of services with a DLP for child protection	99.1%	99.2%	**99.1%**
% of services with a Child Protection Policy in place	99.4%	99.3%	**99.3%**
% of staff trained in Children First in last 3 years*	70.8%	69.4%	**69.9%**
% of services reported needing more support	61.9%	58.1%	**59.2%**

*Total percentage of staff working directly with children and ancillary staff

8.2 Designated staff member

Children First: National Guidance for the Protection and Welfare of Children (DCYA, 2011) specifies that any organisation working directly or indirectly in the care of children should appoint a Designated Liaison Person (DLP), as the responsible person dealing with child protection issues. Respondents were asked to state whether they had a DLP with responsibility for child protection in place, to which 99.1% answered 'yes'. This shows a slight decrease on the 99.4% reported in 2016/17. The county breakdown shows that 100% of respondents in 17 counties reported that they have a DLP for child protection, up from 14 counties in 2016/17 (see Table 8.3 for county breakdown). The lowest percentage was recorded in Donegal (93.1%).

8.3 Child protection policy

The survey asked if services have in place, a written child protection and welfare policy – in line with *Children First* – and if so, to specify the date on which the policy was last reviewed. A total of 99.3% (3,902) services reported having such a policy. Of the respondents who provided details of the date when the policy was last reviewed, 99.6% of services reviewed their policy within the last three years (May 2015 – May 2018).

8.4 Child protection training

Children First: National Guidance for the Protection and Welfare of Children (DCYA, 2011) states that all persons working directly with children have a duty of care to protect them from harm and to promote their welfare. To do so, they should be equipped with the appropriate knowledge and tools to initiate the requisite steps if and when signs of abuse or neglect are observed. In this context, the survey asked services to specify how many of their staff, if any, had received *Children First* training in the preceding three years. The responses reveal that over two thirds (69.9%) of all staff had received training within that period (see Table 8.1), a noticeable increase from 57.8% in 2016/17. The figure for community services (70.8%) is slightly higher than for private services (69.4%).

A county breakdown of percentages (see Table 8.3) shows that Leitrim (84%), Longford (82%), Kerry (82%) and Sligo (81%) had the highest numbers of staff trained in *Children First*. Services in Galway reported the lowest share of staff (59%) who received *Children First* training, although this figure has increased from 52% in 2016/17.

8.5 Further support with child protection

Respondents were also asked to state whether or not staff in their service required further training and support in the area of child protection, and if yes, to state the type of training and support required. Respondents were presented with a prescribed list, which included 'other' and 'no further training and support required'. They were invited to select one option from the list (see Table 8.2).

Table 8.2 Number and percentage of services requiring further support and training in areas of child protection

	Community		Private		All	
Further support and training options	Number	%	Number	%	Number	%
Number of services requiring further support and training	661	62%	1,663	58%	2,324	**59%**
Number of services not requiring further support/training at this time	407	38%	1,197	42%	1,604	**41%**
Of the services requiring further support and training (2,324), the following was specified:						
Developing or updating a Child and Welfare Protection Policy	157	7%	440	19%	597	**26%**
Training in Children First	369	16%	919	40%	1,289	**55%**
Training for the Designated Liaison Person	336	14%	610	26%	946	**41%**
Garda vetting for staff	36	2%	160	7%	196	**8%**
Development of a code of behaviour for working with children	225	10%	531	23%	756	**33%**
Other	175	8%	445	19%	620	**27%**

Of all respondents to the survey, the majority (59%) stated that staff in their service required further training and/or support in relation to child protection. More community services required further training/support (62%) compared to their private counterparts (58%). As in previous years, the largest share of services (55%) require training in *Children First*, followed by training for the Designated Liaison Person (41%). This year, training or support on development of a code of behaviour for working with children was the third highest need identified (33%) amongst services compared to developing or updating a child protection or welfare policy in 2016/17. The percentage of services stating that 'no further support/training is required at this time' has decreased slightly, by less than one percentage point (from 41.5% in 2016/17 to 40.8% in 2017/18). In 17 counties, more than 70% of services indicated the need for further support/training (Carlow, Cork City, Cork County, Donegal, Dublin City, Dublin -– Fingal, Dublin – South Dublin, Galway, Kilkenny, Laois, Louth, Mayo, Monaghan, Roscommon, Sligo, Tipperary and Wexford).

Table 8.3 Percentage of services by county with designated liaison person, written policy and staff trained in child protection

County	% with a DLP for Child Protection	% with Child Protection Policy in place	% of staff with Children First training in last 3 years	% of services who require further training and support
Carlow	100.0%	100.0%	67%	79%
Cavan	100.0%	100.0%	72%	60%
Clare	98.4%	98.4%	67%	65%
Cork City	100.0%	100.0%	66%	79%
Cork County	98.8%	98.8%	61%	79%
Donegal	93.1%	93.1%	61%	84%
Dublin – Dublin City	99.7%	99.7%	73%	78%
Dublin – Dún Laoghaire-Rathdown	100.0%	100.0%	70%	69%
Dublin – Fingal	98.2%	98.2%	74%	72%
Dublin – South Dublin	100.0%	100.0%	74%	72%
Galway	99.6%	99.6%	59%	71%
Kerry	100.0%	100.0%	82%	67%
Kildare	98.8%	98.8%	72%	63%
Kilkenny	100.0%	100.0%	61%	79%
Laois	100.0%	100.0%	69%	75%
Leitrim	100.0%	100.0%	84%	61%
Limerick	100.0%	100.0%	72%	67%
Longford	100.0%	100.0%	82%	58%
Louth	100.0%	100.0%	65%	77%
Mayo	99.2%	99.2%	62%	84%
Meath	98.9%	98.9%	68%	68%
Monaghan	98.1%	98.1%	80%	74%
Offaly	100.0%	100.0%	78%	60%
Roscommon	100.0%	100.0%	77%	79%
Sligo	100.0%	100.0%	81%	76%
Tipperary	100.0%	100.0%	68%	72%
Waterford	97.8%	97.8%	74%	61%
Westmeath	100.0%	100.0%	78%	67%
Wexford	98.5%	98.5%	63%	84%
Wicklow	98.6%	98.6%	72%	70%
Total	**99.1%**	**99.1%**	**70%**	**59%**

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9 Appendices

Appendix I County breakdown of children enrolled, on a waiting list and vacant places

County	Enrolled	Waiting list	Vacant places
Carlow	2,057	260	68
Cavan	3,120	249	104
Clare	4,280	192	383
Cork City	4,246	510	295
Cork County	14,662	869	1,032
Donegal	6,575	477	882
Dublin – Dublin City	16,075	3,492	581
Dublin – Dún Laoghaire-Rathdown	6,357	880	224
Dublin – Fingal	11,149	1,076	450
Dublin – South Dublin	9,294	639	373
Galway	10,514	571	620
Kerry	5,625	269	186
Kildare	8,045	350	304
Kilkenny	3,944	414	195
Laois	3,695	43	298
Leitrim	1,437	63	74
Limerick	7,805	865	278
Longford	1,685	168	59
Louth	4,297	238	197
Mayo	4,509	421	331
Meath	6,996	396	355
Monaghan	3,623	147	190
Offaly	2,697	123	225
Roscommon	2,311	172	98
Sligo	3,144	185	88
Tipperary	6,662	372	437
Waterford	4,612	274	203
Westmeath	3,781	316	385
Wexford	5,724	296	281
Wicklow	4,276	231	224
Total	**173,197**	**14,558**	**9,420**

Appendix II Number of children enrolled (by age) by county with number of services and average per service

County	Children enrolled					No. of services with (>=1) child enrolled	Average enrolled per facility
	Community	Private	Urban*	Rural*	Overall		
Carlow	1,004	1,053	1,213	844	2,057	38	54
Cavan	1,421	1,699	1,988	1,132	3,120	59	53
Clare	1,797	2,483	2,157	2,123	4,280	123	35
Cork City	2,217	2,029	4,246		4,246	87	49
Cork County	4,302	10,360	8,288	6,350	14,662	340	43
Donegal	2,719	3,856	3,408	3,167	6,575	130	51
Dublin – Dublin City	6,491	9,584	16,055	20	16,075	368	44
Dublin – Dún Laoghaire-Rathdown	948	5,409	6,314	43	6,357	146	44
Dublin – Fingal	792	10,357	10,314	835	11,149	275	41
Dublin – South Dublin	1,742	7,552	9,294		9,294	208	45
Galway	3,416	7,098	5,190	5,298	10,514	234	45
Kerry	3,091	2,534	2,309	3,316	5,625	123	46
Kildare	513	7,532	6,397	1,622	8,045	172	47
Kilkenny	1,217	2,727	2,454	1,490	3,944	91	43
Laois	1,174	2,521	2,526	1,169	3,695	70	53
Leitrim	823	614	477	960	1,437	31	46
Limerick	2,517	5,288	5,171	2,634	7,805	165	47
Longford	950	735	531	1,115	1,685	32	53
Louth	950	3,347	3,141	1,156	4,297	95	45
Mayo	1,990	2,519	1,640	2,869	4,509	124	36
Meath	1,402	5,594	5,446	1,550	6,996	174	40
Monaghan	2,279	1,344	1,457	2,166	3,623	53	68
Offaly	647	2,050	1,650	1,047	2,697	67	40
Roscommon	999	1,312	833	1,478	2,311	48	48
Sligo	1,376	1,768	1,993	1,151	3,144	67	47
Tipperary	2,057	4,605	3,807	2,855	6,662	162	41
Waterford	2,393	2,219	3,035	1,577	4,612	90	51
Westmeath	1,048	2,733	2,818	963	3,781	81	47
Wexford	2,086	3,638	2,582	3,139	5,724	132	43
Wicklow	898	3,378	2,672	1,604	4,276	143	30
Total	**55,259**	**117,938**	**119,406**	**53,673**	**173,197**	**3,928**	**44**

*Five services (with 118 children enrolled) could not be geo-coded and do not have an urban/rural classification.

Appendix III Number of children on a waiting list as a percentage of children enrolled by age (community/private)

	Community				Private			
Age range	Number of places sought	Places sought as % of total places sought	Number of children enrolled	Places sought as % of children enrolled	Number of places sought	Places sought as % of total places sought	Number of children enrolled	Places sought as % of children enrolled
Up to 1 year (0-12 months)	626	4%	811	77%	1,173	14%	2,298	51%
1 year+ to 2 years (13-24 months)	1,275	9%	3,193	6%	1,262	2%	7,082	3%
2 years+ to 3 years (25-36 months)	1,664	11%	6,132	4%	1,313	4%	11,917	3%
3 years+ to 4 years (37-48 months)	1,329	9%	15,348	1%	2,598	5%	39,489	1%
4 years+ to 5 years (49-60 months)	615	4%	13,465	5%	1,083	13%	33,989	3%
5 years+ to 6 years (61-72 months)	222	2%	5,135	26%	426	31%	9,048	29%
6 years+ to 8 years (73-96 months)	223	2%	5,010	33%	366	16%	8,026	16%
8 years+	181	1%	6,165	21%	202	15%	6,089	21%
Total	**6,135**	**42%**	**55,259**	**11%**	**8,423**	**58%**	**117,938**	**7%**

Appendix IV Number of children on a waiting list as a percentage of children enrolled by age (urban/rural)

	Urban*				Rural*			
Age range	Number of places sought	Places sought as % of total places sought	Number of children enrolled	Places sought as % of children enrolled	Number of places sought	Places sought as % of total places sought	Number of children enrolled	Places sought as % of children enrolled
Up to 1 year (0-12 months)	1,365	12%	2,278	60%	434	15.9%	830	52%
1 year+ to 2 years (13-24 months)	2,025	17%	7,684	26%	512	18.7%	2,591	20%
2 years+ to 3 years (25-36 months)	2,504	21%	13,412	19%	473	17.3%	4,633	10%
3 years+ to 4 years (37-48 months)	3,247	27%	38,069	9%	680	24.9%	16,734	4%
4 years+ to 5 years (49-60 months)	1,383	12%	31,934	4%	315	11%	15,508	2%
5 years+ to 6 years (61-72 months)	540	5%	9,321	6%	108	4.0%	4,846	2%
6 years+ to 8 years (73-96 months)	461	4%	8,609	5%	128	4.7%	4,395	3%
8 years+	300	2%	8,099	4%	83	3.0%	4,136	2%
Total	**11,825**	**100%**	**119,406**	**10%**	**2,733**	**100%**	**53,673**	**5%**

*Five services (with 118 children enrolled) could not be geo-coded and do not have an urban/rural classification.

Appendix V Staff working directly with children – type of employment by county[50]
(continues opposite page)

	CE – Community Employment*	CSP – Community Services Programme*	JI – Job Initiative Scheme*
County	**Total**	**Total**	**Total**
Carlow	19	1	
Cavan	41		4
Clare	13	8	1
Cork City	54	2	2
Cork County	43	1	
Donegal	56	1	
Dublin – Dublin City	175	16	4
Dublin – Dún Laoghaire-Rathdown	10		
Dublin – Fingal	26	7	
Dublin – South Dublin	38	8	2
Galway	18	1	1
Kerry	53	2	2
Kildare	7		
Kilkenny	23	1	
Laois	21		
Leitrim	9	9	1
Limerick	41		3
Longford	51		
Louth	57	24	3
Mayo	23	8	2
Meath	42		
Monaghan	59		7
Offaly	14	1	
Roscommon	16	5	
Sligo	39	5	
Tipperary	23		1
Waterford	43	1	2
Westmeath	46	2	2
Wexford	50	4	1
Wicklow	28	8	
Total	**1,138**	**115**	**38**

*These schemes are in community services only.

50 Appendix V excludes relief staff.

	Tús*	Directly employed staff			Other		
	Total	Community	Private	Total	Community	Private	Total
		118	128	246			
	2	151	191	342	2	5	7
		234	285	519	1		1
	2	240	278	518			
		485	1,190	1,675		11	11
	7	303	418	721	6	1	7
	9	893	1,372	2,265		8	8
	1	135	794	929		4	4
	3	100	1,279	1,379		7	7
	7	207	1,017	1,224		6	6
	4	381	814	1,195		7	7
	2	333	299	632		2	2
		59	900	959		7	7
	2	153	293	446		4	4
		101	295	396		4	4
		103	68	171		1	1
		282	606	888	2	5	7
		100	93	193			
		85	396	481		3	3
	5	217	280	497		3	3
		169	664	833		3	3
	1	233	159	392		4	4
	1	86	219	305		1	1
		107	167	274			
	2	170	218	388	1	3	4
	5	252	501	753	1	3	4
	1	258	231	489	1	1	2
	3	130	288	418		4	4
	2	250	393	643		5	5
	2	79	410	489		4	4
	61	**6,414**	**14,246**	**20,660**	**14**	**106**	**120**

Appendix VI Staff working directly with children by urban/rural breakdown and by highest level of qualification attained

	Urban*		Rural*		All	
Total staff by urban/rural*	15,742	71%	6,377	29%	22,132	**100%**
NFQ Level 5 or above	14,673	93%	6,012	94%	20,698	**94%**
NFQ Level 6 or above	10,162	65%	4,220	66%	14,388	**65%**
No childcare qualification	1,001	6%	337	5%	1,338	**6%**
NFQ Level 4 Award	68	0.4%	28	0.4%	96	**0.4%**
NFQ Level 5 Award	4,511	29%	1,792	28%	6,310	**29%**
NFQ Level 6 Award	6,651	42%	2,877	45%	9,533	**43%**
NFQ Level 7 Award (Ordinary Degree)	1,018	6%	390	6%	1,408	**6%**
NFQ Level 8 Award (Honours Degree)	2,276	14%	874	14%	3,151	**14%**
NFQ Level 9/10 Award (Masters/PhD)	217	1%	79	1%	296	**1%**

*Five services (with 13 staff) could not be geo-coded and do not have an urban/rural classification.