

Isle of Anglesey County Council	
Report to:	Executive
Date:	27.06.2023
Subject:	Childcare Sufficiency Assessment
Portfolio Holder(s):	Gary Pritchard
Head of Service / Director:	Fon Roberts
Report Author:	Danielle Thomas
Tel:	01407 767785 / 07971 578100
E-mail:	daniellethomas@anglesey.gov.wales
Local Members:	All - a county council statutory responsibility

A –Recommendation/s and reason/s

Section 22 of the Childcare Act 2006 places a duty on all Welsh local authorities in partnership with other local (statutory, community and private sector) stakeholders, professionals, and providers: secure sufficient, accessible and high-quality childcare for children aged 0-14 years in their local area, so far as is reasonably practicable for working parents, parents/carers who are studying or training for employment.

The 2016 Statutory Childcare Sufficiency Assessment (CSA) Guidance outlines that Welsh local authorities are required to complete and submit a copy of two documents to Welsh Government in June 2022, i.e.: i. Childcare Sufficiency Assessment document; ii. Childcare Sufficiency Action Plan, which must 'detail the actions, priorities and milestones to maintain strengths and address shortcomings identified in the Childcare Sufficiency Assessment' alongside annual progress report must detail the progress which has been made against the actions, priorities and milestones in the (2022) Action Plan.

Additionally, the Childcare Sufficiency Plan is included in the Council's Constitution (under Policy Framework) as a matter reserved for full Council approval.

B – What other options did you consider and why did you reject them and/or opt for this option?

Part of Council Constitution under Policy Framework to present report for full Council Approval.

C – Why is this a decision for the Executive?

An online search doesn't reveal any historical discussion at full Council in relation to previous Plans; but there are some ad-hoc reports to Executive in April 2014, March 2015, April 2017, January 2019 – the Plan and/or update report. As a local authority we work in partnership across all services, in relation to this report views have been sought from the Learning Services, Children and Families Service and it has been discussed at the Senior Leadership meeting also.

Ch – Is this decision consistent with policy approved by the full Council?

Yes - we consider that this report ties into the newly published Council plan.

D – Is this decision within the budget approved by the Council?

Yes

Dd – Assessing the potential impact (if relevant):

1	How does this decision impact on our long term needs as an Island?	<p>The Childcare Sufficiency Assessment 2022 and the 2023 Review and Plan identified the key objectives which will help support the growth and retention of Childcare providers on the Isle of Anglesey. In turn this will ensure a sustainable Childcare sector offering foundational development opportunities for children whilst supporting parents / carers to work.</p> <p>In determining whether the provision of childcare is sufficient to meet requirements, the 2006 Childcare Act was introduced placing a duty on local authorities in Wales to secure sufficient childcare in their area to enable parents to take up or remain in work or to undertake education and training in order to obtain work. By supporting parents / carers to work this supports Welsh Government in tackling poverty, although poverty is still an issue. Additionally, the Welsh Government programme - Childcare Offer for 2 year olds, offers further support for parents / carers to return to work at an earlier stage, combating the cost of living crisis. By undertaking the CSA this provides vital information and identification for the specific development needs of Childcare across Anglesey.</p>
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	Approval sought for the Assessment. There is no assessment of costs to the authority.
3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.	Yes – all sectors involved in childcare provision and development and a consultation with parents and carers in 2022
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	Yes, a full and thorough consultation was completed with feedback and outcomes stipulated in the Childcare Sufficiency Assessment 2022.

Dd – Assessing the potential impact (if relevant):		
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	There are specific considerations that assess impact on children with disabilities ensuring access to childcare and consultation has been undertaken with specific groups that may be impacted by the Equality Act 2010.
6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	Approval of Assessment and plan sought and potential impact on social economic cohort derives from insufficient childcare being a barrier to work.
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.	As part of the Childcare Sufficiency Assessment one of the main objectives is the retention, growth and use of the Welsh Language in settings. As part of the 2006 Childcare Act Welsh local authorities must have regard to: the provision of childcare involving the use of the Welsh language. This naturally requires that local authorities have a central role in the development of Welsh medium and bilingual childcare provision in their areas, in partnership with relevant organisations. Support is provide to all the childcare sector to use the Welsh language and signposted to businesses that provide this additional resource.

E – Who did you consult?		What did they say?
1	Chief Executive / Senior Leadership Team (SLT) (mandatory)	in the process
2	Finance / Section 151 (mandatory)	no identified financial implications beyond current scope
3	Legal / Monitoring Officer (mandatory)	not applicable save for adhering to statutory responsibility to produce Assessment, approval and publication as final version.
4	Human Resources (HR)	not applicable
5	Property	not applicable
6	Information Communication Technology (ICT)	not applicable save for published on the Council web page
7	Procurement	not applicable
8	Scrutiny	awaited following consideration by Senior Leadership team
9	Local Members	not applicable as county wide

F - Appendices:
See attached Childcare Sufficiency Assessment 2022 and CSA Review / Plan 2023.



Isle of Anglesey
Childcare Sufficiency



Isle of Anglesey
Childcare Sufficiency

Ff - Background papers (please contact the author of the Report for any further information):

As above.



CYNGOR SIR
YNYS MÔN
ISLE OF ANGLESEY
COUNTY COUNCIL

Isle of Anglesey

Childcare Sufficiency Assessment

Progress Report

2023

Recommendation 1: Access to childcare, affordability and flexibility of childcare provision

Action	Target Outcomes	Progress during 2022/23	Action Plan 2023/24
<p>The Local Authority will continue to work with partners in the early years and childcare sector to support the number of registered places which are available, to include engagement with the sector on the feasibility of flexible childcare provision and the barriers.</p> <p>The Local Authority continues to work with partners in the early years and childcare sector to ensure that the sector is confident to develop their services to provide childcare for 2 years olds. and continue to provide the Childcare Offer as it</p>	<p>That parents/carers have access to childcare operating outside current hours</p> <p>Current number of providers is maintained and additional providers supported to develop their business and new providers, such as childminders is encouraged to provide parents with a choice of childcare.</p>	<p>Childcare provision is mostly available between 8am and 6pm, this includes settings offering full day provision – breakfast club, cylch, lunch time wraparound, childcare and after school club.</p> <p>9 out of 10 nurseries open at 7.30am</p> <p>Childminders opening hours vary from 7am-6pm with only 4 currently offering 7am start.</p> <p>Currently we only have one childminder who offers overnight care.</p> <p>Childcare providers that have capacity have registered to provide the Childcare Offer for Wales (Making them more sustainable).</p>	<p>Continue to work with partners to discuss the feasibility of offering extend opening hours to provide more flexibility to parents. Discussions on going in steering groups but also to be brought up for discussion in the next Childcare and Play Conference with providers in February 2024.</p> <p>Continue to support Pacey Wales in contributing to Childminder registration costs and training to train up to 4 new Childminders every year throughout 23/24. Continue to provide support for providers who are yet to register</p>

<p>is redesigned to an online application format.</p> <p>Local Authority and all umbrella organisations and childcare providers provide consistent support and information to parents / carers to access childcare that is grant supported or subsidised</p>	<p>Number of providers providing 2- and 3-year-old childcare placements is 80% of the sector.</p> <p>An increase in the number of parents/carers making application for subsidised childcare.</p> <p>More parents/carers reporting childcare more affordable/ not a barrier to work/ training.</p>	<p>All providers offering Childcare offer are registered on the online platform.</p> <p>One new childminder has been supported to complete training to become a childminder.</p> <p>3 new after school clubs have completed registration with CIW providing 65 additional afterschool spaces.</p> <p>All Childminders and nurseries provide childcare for 2- and 3-year-olds.</p> <p>All pre-school (Mudiad Meithrin and Early Years Wales) provides places for 21/2 year olds with 10 settings providing places for 2 year olds.</p> <p>Number of parents accessing the Childcare Offer with 596 active agreements.</p>	<p>for the online platform. Continue to promote the Childcare Offer for Wales to providers and parents throughout 23/24.</p> <p>Continue to Partnership working with Pacey to part fund registration of further new childminders throughout 23/24.</p> <p>Recognise the areas of need for afterschool childcare and work with partners to develop provision, ongoing throughout 23/24.</p> <p>Expansion of Childcare for 2 year olds- via the Flying Start expansion commencing in September 2023.</p>
--	--	--	--

<p>through schemes such as Tax Free Childcare</p> <p>The local authority and umbrella bodies to scope gaps in childcare provision especially with after school and holiday provision and develop such provisions along side new providers or existing providers. The local authority to consider a childcare setting essential as part of its School Modernisation Programme.</p>	<p>Parents/carers have access to childcare all year round within a reasonable distance of home or work.</p> <p>Increase in childcare provision on school sites.</p> <p>Increase in number of childcare places in Canolbarth Mon.</p> <p>An increase in childminders across the county.</p>	<p>This needs consultation with parents to gain their opinion.</p> <p>Parents/carers have some access to childcare all year round via provision in 5 modular buildings across the island. With the addition of 2 new provisions (Henblas/ Santes Dwynwen). These childcare provisions are on school sites.</p> <p>Registered one new Childminder.</p>	<p>Further expansion of Modular Buildings via Capital Funding. To provide full day care and holiday provision with an additional two (Corn Hir and Llanfawr) opening in September 2023.</p> <p>Need to consult with parents to gain their opinion on affordability of childcare and if this is a barrier to work or training, January 2024 onwards.</p> <p>Need to promote Tax Free Childcare for providers as well as with parents, ongoing throughout 23/24.</p> <p>Further development of Modular buildings via Childcare Offer Capital funding after September 2024.</p> <p>Continue to promote The Childcare Offer, ongoing throughout 23/24.</p> <p>Continue to support new Childminders through partnership working during the registration process, ongoing throughout 23/24.</p>
--	--	--	---

Recommendation 2: The local authority and umbrella bodies continue to support childcare providers to be of a high quality

Action	Target Outcomes	Progress during 2022/23	Action Plan
<p>The Local Authority and umbrella bodies will continue to support as much as possible the provision of training to ensure high quality childcare settings.</p> <p>The local authority and umbrella bodies will ensure that childcare providers are informed of Care Inspectorate Wales and Estyn standards.</p>	<p>Increase in attendance at training opportunities across the childcare sector.</p> <p>Childcare settings rated as good by CIW and Estyn or demonstrate sector-leading practice.</p>	<p>Provided statutory training required from workforce taken into consideration 62 providers had Safeguarding training, 67 providers provided with Paediatric First Aid Training.</p> <p>Providers have not had CIW an Estyn inspection due to Covid restrictions. These inspections have now resumed.</p>	<p>Continue to provide statutory training for childcare sector. Including any required within the review of NMS - such as Advanced Safeguarding, ongoing throughout 23/24.</p> <p>Track inspections and ratings, work in partnership with umbrella bodies to ensure standards of provision throughout 23/24.</p> <p>Review after school clubs and work with settings that are not registered with CIW to complete registration, continued work from 2022 into 23/24.</p>

Recommendation 3: The Local Authority and partners will continue to support the provision of childcare for children with additional learning needs.

Action	Target Outcomes	Progress during 2022/23	Action Plan
<p>The Local Authority will continue to ensure that its early years childcare sector is supported and committed to the Additional Learning Needs transformation programme</p>	<p>The early years and childcare sector will be inclusive and accessible to all children.</p> <p>Childcare providers will be confident in meeting a child's needs.</p>	<p>ALN Module 1 and 2 training offered to the whole sector.</p>	<p>Continue to provide training needed for ALN and provide support as needed, annual arrangements and training booked and offered to providers for 23/24.</p>

Recommendation 4: The Local Authority and partners will continue to develop and support Welsh-medium childcare.

Action	Target Outcomes	Progress during 2022/23	Action Plan 23/24
<p>The Local Authority will continue to work in partnership with its early years and childcare sector partners, to ensure that all parents/carers and children have access Welsh-medium childcare provision the local authority and partners in Cwlwm and Menter Iaith will signpost staff and parents to Welsh Language classes to support the confidence of the workforce to work through the medium of Welsh .</p>	<p>Increase in childcare providers providing through the medium of Welsh.</p> <p>The workforce is confident in providing care through the medium of Welsh.</p> <p>Parents/ Carers report that Welsh medium childcare is readily available.</p>	<p>Pre-school settings are under Mudiad Meithrin or EYW umbrella body and their aim is to increase the number of Welsh providers.</p> <p>Signpost to - Ogi Ogi App</p> <p>Signpost to Welsh Course</p> <p>15 providers have completed the bronze level ‘Taith i Iaith’ path with a further 10 starting on the bronze level and 13 starting on the silver level.</p> <p>Consultation needed with parents/carers in relation to availability of Welsh Medium childcare.</p>	<p>Questionnaire/review of level of Welsh in childcare settings Staff and Managers, language of provision (Active Offer) – September 24 onwards.</p> <p>Cylchoedd to register on the Dewis website stating language of provision- September 24 onwards.</p> <p>Newsletter - add key words/terminology – Commenced March 2024 and sent out quarterly.</p> <p>Informal groups for providers to practice their Welsh throughout 23/24.</p> <p>Partnership working to support the use of the Welsh language throughout 23/24.</p> <p>Continue to expand providers on the ‘Taith i Iaith’ path. Commences April 2023 and continue throughout 23/24.</p>

			Consultation with parents/carers/providers, January 2024.
--	--	--	---

Recommendation 5: The Local Authority, Cwlwm partners and others will support childcare as a well-paid and respected career.

Action	Target Outcomes	Progress during 2022/23	Action Plan
<p>To review fees charged across the sector to enable a review of salaries paid across the sector</p> <p>To work regionally with the childcare sector to review recruitment and retention policies and procedures.</p> <p>To review career pathways available from young people to adults already in employment in the sector.</p> <p>Promoting childminding and work in the sector as a fulfilling career that reflects commitment</p>	<p>Childcare fees are reflective of the business needs and sustain the sector and its staff to support salaries on a par with other professions in the early years.</p> <p>Careers pathways created, an increase in number choosing to work in the sector, sustainable childcare provision.</p> <p>Staff in the sector are confident in their career pathways and opportunities and report improved pay and conditions.</p>	<p>This is something that each provider needs to address in regards to their own business structure.</p> <p>Social Care Wales have existing qualification Framework for childcare to follow.</p> <p>This has not been consulted on.</p>	<p>Business support for providers to enable them to have a structured charges system to cover session costs, throughout 23/24 but already instigated in Flying start settings.</p> <p>Partnership working with colleges / school's job fairs to promote childcare as a career pathway, ongoing throughout 23/24, however increase attendance at job fairs from September 2024.</p> <p>Needs consultation with practitioners in the childcare sector – January 2024.</p>

and qualifications with a fair wage.			
--------------------------------------	--	--	--

Childcare Sufficiency Assessment Form 2022

Name of Local Authority: Isle of Anglesey County Council



Name of Responsible Officer: Danielle Thomas

Job Title: Early Years Manager

Date of Completion: June 2022

DRAFT

Contents

	Pages
Introduction, Context and Background	1 - 7
Partnership Working and Consultation	8
Welsh in Education Strategic Plans	9 - 12
Overview – Childcare Types, Services and Places	13 - 22
Needs of Parents/Carers – demand for childcare	23 - 35
Outcomes of Consultation with Stakeholders and Employers	36 - 38
Outcomes of Consultation and Young People	39 - 44
Outcomes of Consultation with Schools	45 - 49
Geographical Distribution	50 - 53
Sustainability	54 - 64
Cross Border analysis	65
Effects of COVID-19	66 - 68
Population and Key Demographics	69 - 83
The Childcare Sufficiency Assessment and Local Wellbeing Plans	84
Gaps Analysis	85 - 91
Summary of Unmet Needs	92 - 93
Barriers to Childcare Provision	94 - 99
Workforce Development and Training	100 – 104
CSA Action Plan	105 - 111

1 Introduction, Context and Background

Section 22 of the Childcare Act 2006 places a duty on all Welsh local authorities to in partnership with other local (statutory, community and private sector) stakeholders, professionals and providers: secure sufficient, accessible and high-quality childcare for children aged 0-14 years in their local area, so far as is reasonably practicable for working parents, parents/carers who are studying or training for employment.

Additionally, regulations made by the Welsh Government under section 26 of the Act 2, require local authorities to undertake Childcare Sufficiency Assessments (CSA) for their area. These regulations prescribe the process and planning cycle, the consultation and publication requirements, including details of the information which must be captured in a cyclical (as of 2017, five yearly) assessment.

Accordingly, the Isle of Anglesey County Council has a statutory duty to work with early years and childcare providers within its private, voluntary, independent and maintained sectors to create accessible, sustainable, affordable and high-quality childcare sufficient to meet the needs of all parents and carers. The County Council will compare this 2022 Childcare Sufficiency Assessment of parents' demand for childcare with information about the current and planned availability (aka supply) of such childcare places. Therefore, this 2022 Childcare Sufficiency Assessment (CSA) follows on from the previous 2017 Childcare Sufficiency Assessment, the Action Plan of which can be viewed at: <https://democracy.anglesey.gov.uk/documents/s11389/Binder1.pdf?LLL=0>.

The 2016 Statutory CSA Guidance outlines that Welsh local authorities are required to complete and submit a copy of three documents to Welsh Government in June 2022, i.e.: i. Childcare Sufficiency Assessment document; ii. Childcare Sufficiency Action Plan, which must *'detail the actions, priorities and milestones to maintain strengths and address shortcomings identified in the Childcare Sufficiency Assessment'* and; iii. a (subsequent in 2023) annual progress report must detail the progress which has been made against the actions, priorities and milestones in the (2022) Action Plan, including any significant issues or changes which have happened over that year which might have impacted on or have influenced the childcare market in any way - for example a new housing development. The Guidance elaborates that: *'In particular, local authorities will need to liaise with their Family Information Services and the Care Standards Inspectorate for Wales (CSSIW) to ensure there is an up to date picture of childcare supply and demand'*.

This 2022 Childcare Sufficiency Assessment summarises makes judgements about sufficiency using data about the demand for childcare (post the worst effects of the 2020 COVID-19 pandemic) and the amount of childcare available on the island in spring 2022 (i.e. the supply of types of formal childcare).

The 2016 Welsh Government Statutory Guidance for local authorities, also sets out how the Local Authority (and this Childcare Sufficiency Assessment) should continue to have regard for:

- (a) the childcare needs of parents in their area
- (b) the provision of childcare in respect of which the childcare element of working tax credit or universal credit is payable
- (c) the provision of childcare in respect of which employer supported childcare or tax free childcare is payable
- (d) the provision of childcare for children who have special educational needs or require specialist care due to disability
- (e) the provision of childcare involving the use of the Welsh language
- (f) the provision of childcare which enables them/parents to access their foundation phase early education entitlement and
- (g) the provision of childcare which enables them/parents to access their entitlement for free childcare places.

Additional to the 2016 Welsh Government Statutory Guidance, in March 2021, the Welsh Government issued supplementary guidance for local authorities for their Childcare Sufficiency Assessment (CSA) 2022 process. This directed that in their 2022 full assessment, Welsh local authorities would need to report on how the COVID-19 pandemic has affected the supply of childcare, the demand for childcare and the sustainability of existing childcare providers, as well as how these impacts will be addressed.

That supplementary document also states that: *“Welsh Government acknowledges that, given the timing of the full CSA in 2022, parents may remain uncertain, when asked, about their childcare requirements in the future and that local authorities may need to draw some conclusions based on trends in demand and on the basis of the best information available to them at the time. Local Authorities have the opportunity to take stock of their Action Plan every year as part of their annual reporting on progress and it is recognised that it may be necessary to revisit some of the objectives set out in the 2022 Action Plan in light of further information and developments in respect of the virus”.*

Importantly, this CSA provided an opportunity to determine the extent to which COVID-19 had indeed been a (localised) factor in each of the Isle of Anglesey’s 11 wards – including from the perspective of a reduction in demand for formal childcare businesses. A key question for the all Welsh local authorities has been: *If this change is in parents habits and routines is ongoing, will the Isle of Anglesey’s early years and childcare market be able to adjust to this change in demand and still be sustainable?*

Ultimately, this 2022 CSA has also been an opportunity to:

- Determine the extent to which the COVID-19 pandemic indeed affected: (a) the *supply* of early years and childcare (aligned to specific localities); (b) the demand for on-site childcare and (therefore); (c) the sustainability of existing early years and childcare providers
- Establish the views of local parents, carers and guardians on early years and childcare, particularly in relation to (their) future demand and specified need(s). This ambition incorporates: (a) the whole Anglesey area, taking account of trends of (localised) demand and supply and; (b) an identification of specific gaps for particular groups/families from specific circumstances to ensure that there is sufficient childcare - for all families - across the local authority
- Establish the future supply and demand in relation to the Isle of Anglesey Flying Start programme - and therefore **inform relevant future childcare commissioning arrangements**
- Help ensure that local families are able to access childcare locally that meets their needs and enables them to make a real choice about work and their **employability**
- Establish *how much, of what types, at what times, and in which the Anglesey localities'* parents, carers and guardians require childcare, and determine any other specific requirements those parents have including access to the three types of funded early education places
- Provide a further steer for the Isle of Anglesey Council to *be proactive and innovative* in exploring and securing funding to support local and national initiatives and in ensuring families are encouraged to claim the financial support available
- Identify and action plan measures to strengthen, enhance and increase Welsh-medium childcare provision
- Establish the extent to which nannies and alternative home childcare providers are actually employed within the locality

The CSA Action Plan (see page 105) incorporates a vital acknowledgement that:

- **Continued partnership working between relevant local partners and stakeholders will continue to be a way forward that enables childcare needs to be met on the island**
- **COVID-19 may continue to effect the local childcare and early years sector, particularly from the perspective of sustainability**
- **Continued access to grant funding will continue to be a factor within the ambition to sustain existing childcare providers**

The Action Plan also acknowledges that provision for two year olds is now a Welsh Government priority to develop following the Welsh Government pledge in November 2021 to offer free childcare to all two-year-olds and plans to boost Welsh-medium childcare¹. Currently, only two-year-olds in Wales from disadvantaged backgrounds can claim 12.5 hours a week of free childcare under the Flying Start programme, however, the Welsh Government and Plaid Cymru unveiled a plan to expand its 'free childcare' offering to all two-year-olds. The roll out of funded childcare will be a phased approach from September 2022.

Finally, and as vital context, in January 2022, the Welsh Parliament published the report: *Minding the future: the childcare barrier facing working parents*². Key recommendations of this report were that:

- The Welsh Government sets out a plan to deliver universal wraparound care, including after-school clubs that can accommodate all those who want to benefit from them
- The Welsh Government sets out how it intends to address the eligibility criteria in the Childcare Offer to make it easier for parents employed in atypical hours, such as insecure work, shift work or on zero-hours contracts, to access provision
- The Welsh Government sets out how it intends to work with local authorities and health boards to improve awareness and understanding of the childcare support available to new parents. Potential approaches could include: writing to new parents or promoting the support available when parents register the birth of their child; and providing information to parents in sufficient time ahead of the end of maternity leave to help them to make informed decisions about childcare
- The Welsh Government sets out plans for addressing the gap in childcare between the end of maternity leave and eligibility for the Childcare Offer. This should include indicative timescales, and an evaluation of the financial and practical factors that would need to be taken into account in addressing this gap
- The Welsh Government sets out plans to place more Welsh-medium childcare on school sites, given that progression from Welsh-medium childcare to Welsh-medium primary education is higher when this occurs
- The Welsh Government sets out in its response its plans to work with local authorities to ensure that Family Information Services provide resources in community languages other than, and in addition to, English and Welsh
- In order to address *widespread concerns* around the lack of ethnic diversity in the sector, the Welsh Government sets out plans for their new race disparity unit to build an evidence base around the level of ethnic minority representation in the childcare workforce
- The Welsh Government sets out a plan which requires all childcare providers to undertake cultural and diversity awareness training, such as that being developed by CWLWM, and to ensure that it becomes part of continuous professional development within the sector

¹ <https://gov.wales/sites/default/files/publications/2021-11/cooperation-agreement-2021.pdf> - page 5.

² <https://business.senedd.wales/documents/s122062/Report.pdf>

- The Welsh Government sets out a plan to develop and strengthen the childcare provision for children with additional learning needs, including increasing the amount of funding available through the Childcare Offer for Wales Additional Support Grant to improve provision for children with disabilities and/or additional or complex needs
- The Welsh Government sets out how it will ensure sufficient funding is available in the expansion of the Childcare Offer under the Co-operation Agreement to allow two year olds with additional or complex needs to fully access provision
- The Welsh Government sets out in its response its plan to deliver a sufficient increase in the hourly payment to providers under the Childcare Offer to enable an increase in staff pay, and a timeframe by which all childcare workers will be paid the Real Living Wage, learning from the Scottish Government's incorporation of this into their childcare expansion
- The Welsh Government sets out a plan to ensure that the upcoming childcare recruitment campaign by Social Care Wales reaches and attracts groups such as ethnic minorities and Welsh speakers who are underrepresented in the childcare workforce.

DRAFT

2 Partnership Working and Consultation

As part of the production of the 2022 Isle of Anglesey Childcare Sufficiency Assessment, structured qualitative and quantitative consultation was undertaken with a broad spectrum of partners, stakeholders, professionals and educators. Consultation was also undertaken with children and young people ³, parents/carers, childcare providers, persons with interest in childcare and their representatives, local employers, and persons representing them and employer organisations, neighbouring local authorities and educational establishments, including the schools located on the island.

Further details about specific partners that were consulted in order to produce a robust and comprehensive CSA, which gathered a broad spectrum of feedback and viewpoints can be read in Section A of this CSA document. In terms of feedback from the local authority and its relevant officers and professionals, consultation was undertaken with:

- Family Information Service: Teulu Mon
- Local Authority Partners
- North Wales Safeguarding Board
- Youth services representatives
- CWLWM partners who include Clybiau Plant Cymru Kids Club's, Early Years Wales, National Day Nursery Association, PACEY Cymru and Mudiad Meithrin
- Welsh in Education Strategic Plan (WESP) representatives
- Those working with adults on the theme of employability and training
- Schools
- Those that work with disadvantaged families, in particular in areas of Holyhead and including on themes such as the Flying Start programme, parenting and social services

Essentially, the Isle of Anglesey County Council is confident that it has consulted to an extent that ensures a robust 2022 Childcare Sufficiency Assessment – which will help to inform the ongoing work to rejuvenate the early years and childcare sector's presence and standing after the challenges presented by the 2020-2022 COVID-19 pandemic.

³ In 2022 the Isle of Anglesey County Council were also undertaking a Play Sufficiency Assessment and this project co-produced the majority of consultation with children and young people, including on the theme of out of school childcare and activities.

3 Welsh in Education Strategic Plans

The 2006 Childcare Act introduced a duty on local authorities in Wales to secure sufficient childcare in their area to enable parents to take up or remain in work or to undertake education and training in order to obtain work. In determining whether the provision of childcare is sufficient to meet these requirements, Welsh local authorities must have regard to: the provision of childcare involving the use of the Welsh language.

This naturally requires that local authorities have a central role in the development of Welsh medium and bilingual childcare provision in their areas, in partnership with relevant organisations.

This assessment is therefore mindful that the Welsh Government published statutory guidance on Welsh in Education Strategic Plans (WESPs) on 27 January 2021⁴. That guidance sets out the Welsh Government's expectations in terms of how local authorities, working with key stakeholders, will plan for continuity of Welsh medium education to support the realisation of the vision of a million Welsh speakers by 2050. Local authorities are expected to set an overarching ten year target outlining the expected increase in Year 1 children who are taught through the medium of Welsh in the local authority's area.

In doing so, local authorities should identify and plan measures to strengthen and expand Welsh-medium childcare provision in the area to ensure a seamless route to Welsh-medium education and ensure that the Teulu Mon Service (among other forums and organisations) provides information on the advantages of raising children bilingually and using Welsh in the family home. To support the planning process, the Welsh Government provides local authorities with relevant data.

Figures published by StatsWales in September 2021 indicated that the Isle of Anglesey locality has one of the highest percentages of its population having an ability to speak Welsh language (63.3%). Even given the relative size of that percentage, the Isle of Anglesey County Council is committed to ensuring that the use of the Welsh language is a high profile ambition for its locality.

⁴ The Welsh in Education Strategic Plans (Wales) (Amendment) (Coronavirus) Regulations 2020 (S.I. 2020/1194 (W. 271)) ("the 2020 Regulations") which came into force on 1 December 2020 makes changes to the start date of the next WESP cycle. Local authorities are required to prepare and submit the first ten year WESP Plan to the Welsh Ministers for approval no later than 31 January 2022 and the first ten year Plan will commence on 1 September 2022 and expire on 31 August 2032. Childcare and Play leads within local authorities will want to take note of these changes; to ensure that engagement with local authority WESP leads and key stakeholders takes place at an opportune time in the planning cycle and include objectives in their 2022 CSA which are clearly linked to the local authority's plans for growth and continuity in Welsh medium education and the 10 year target in respect of Year 1 children. There is also a requirement that the WESP take account of the local authority's CSA. There will be opportunities for local authorities to update and resubmit their WESPs to the Welsh Government should any issues or opportunities be identified as part of their annual reviews and related changes can be captured in annual CSA updates.

This intention is referenced in the local authority's Welsh in Education Strategic Plan (WESP) – which can be viewed at: <https://www.anglesey.gov.wales/en/Residents/Schools-and-learning/Strategic-Plan-for-Welsh-in-Anglesey-Education-2017-2020.aspx>

The WESP for the Isle of Anglesey County Council outlines a vision that: all Anglesey's children and young people are bilingually proficient and possess the ability to use both languages equally at the end of their educational career by ensuring that not one pupil is deprived of that ability or right.

It also has a supplementary aim to ensure that: every pupil who goes through the Anglesey education system is fully bilingual when reaching 16 years of age, and is equally confident in communicating in both languages in the world of work, culturally and socially. This aim is supplemented by a set of objectives aligned to each cohort and for early years this includes an ambition to ensure, through the organisation and provision of dedicated and appropriate nursery provision (including immersion techniques), that every child is given (whatever their linguistic background) a solid foundation in Welsh as soon as possible.

For the Foundation Phase, the WESP outlines an objective to *“building on the foundation set in the nursery and reception classes by continuing to develop all pupils' grasp of Welsh”* and for Key Stage 2: *“to continue to develop the children's grasp of Welsh by paying attention to promote confidence in their language skills”*.

The WESP for Anglesey also embodies and conforms to the policies and strategies of the Council and Welsh Government, including:

- Welsh Language Strategy 2016 – 2021 Anglesey County Council
- Anglesey Council Lifelong Learning Department's Language Policy
- Welsh Government's draft strategy for 'One million Welsh speakers by 2050'

The Isle of Anglesey County Council has an aspiration that every pupil should be proficiently bilingual, to enable them to communicate, work and play a full part in the island's culture. Essentially each of the island's WESP outcomes contribute to the aim of increasing the use of Welsh.

They include, among other things, increasing the number of pupils being taught in Welsh, more children using the language when moving from nursery to primary school, more pupils studying for Welsh qualifications, and creating more opportunities to use the language in different contexts.

Additionally, the Isle of Anglesey's Welsh Language Promotion Strategy 2021-2026⁵ sets out that for children and young people, an early proficiency of the Welsh language should be achieved via:

- Language transmission within the family
- The early years up to five years of age
- Compulsory education
- Post-compulsory education and preparing for the world of work

The Strategy states that *“we must focus on creating positive language associations early in children’s lives. We need to reach out to prospective parents during pregnancy and maternity/paternity periods to reinforce positive messages about the benefits of introducing and passing on Welsh to their babies”*.

It further explains how early years’ practitioners have an influential role in many new parents’ lives and that the Local Authority work with Menter Iaith Môn as part of the Anglesey Welsh for Families Partnership to equip them with appropriate information and resources. Flying Start officers also offer targeted support for children under three years of age and their families as part of the Welsh Government’s early years programme. That programme’s primary focus is to promote social, emotional, cognitive and language skills, physical development and the early identification of additional needs – and it aims to ensure that positive messages about the benefits of using Welsh with their children are shared with parents who come into contact with the service.

As well as Flying Start, Menter Iaith, Mudiad Meithrin and schools also work to ensure that early years providers receive the support they need to positively influence the language patterns of the young children in their care. This is ambition is enhanced by the fact that Mudiad Meithrin (the leading provider of language immersion opportunities) has a strong presence on the island. For example, as well as the many Cylchoedd Meithrin and Cylchoedd Ti a Fi that operate on the island, one of that organisation’s day nurseries is located in Llangefni.

It can also be noted that all but two of Anglesey’s primary schools are community schools under the Isle of Anglesey County Council's control.

This means that Welsh is the main medium of instruction for 87% of primary pupils.

⁵ <https://www.anglesey.gov.wales/documents/Docs-en/Council/Democracy/Welsh-Standards/Welsh-Language-Promotion-Strategy-2021-2026.pdf>

Finally, it can be noted that the bilingual language policy of all of Anglesey's schools and early years childcare settings will be strengthened with the introduction of a new and updated Welsh in Education Strategic Plan in 2022.

As part of the research that was undertaken in order to inform this Childcare Sufficiency Assessment, in autumn 2021, Isle of Anglesey County Council invited representatives of *setting-based* early childcare providers to state whether they had any plans to expand the number of Welsh-medium places that they offered. Encouragingly, 41% stated that they had either definite plans in place or that this is something that they would maybe consider.

100% of all early years childcare settings (i.e. full day care providers and sessional care providers) stated that they were happy that they currently had enough ()Welsh language proficient staff.

The Welsh Government parental survey accounted for responses on the theme of Welsh medium childcare: 63% (almost two-thirds) of responding parents/carers stated that they currently accessed childcare through the medium of Welsh, and 5% stated that this was something they would ideally like to do – for example:

“When I finish maternity leave I will use a Welsh medium breakfast club and after school club”.

“When my son goes to the Cylch it will be Welsh medium of course... he will use 10 hours there and 20 hours at a private nursery”.

“I will use Welsh medium childcare when I finish maternity leave” – and similarly:

“I will probably use Welsh medium childcare when I finish maternity leave”.

4 Overview – Childcare Types, Services and Places

4.1 Fundamental Supply of Registered Childcare in the Isle of Anglesey

The following section outlines fundamental metrics aligned to the supply of childcare within the Isle of Anglesey locality – including details focusing on the number of places available/per type and the number of childcare providers situated across the locality.

Table 1 - In summer 2022, the following number of **registered with CIW** childcare providers were accessible in the Isle of Anglesey.
Source: IoACC

Type of childcare	Number of childcare providers	Number of Registered childcare places
Full day care/Private Day Nursery	35	1,115
Sessional care	20	417
Childminders	40	352
Out of school care	15	386
Creche	0	0
Total	110	2,270

It can be noted that there are 0 known nannies and au-pairs that are operational on the Isle of Anglesey. There are also 0 registered creches operating on the island. Finally, there are 0 open access playschemes located on the island.

4.2 Subsequently, Table 2 below indicates the number of places accessible in each of the locality's 11 wards – aligned to the four main types of registered childcare, i.e.: 1. full day care/private day nursery; 2. sessional care, e.g. playgroups and Cylch Meithrin[s]; 3. registered childminders and; 4. out of school childcare providers.

Table 2 - Fundamental supply of registered (with CIW) childcare places across the Isle of Anglesey locality in summer 2021

Source: IoACC SASS

Ward name	Number of full day care/private day nurseries providers	Number of full day care/private day nursery places in the ward	Number of sessional care providers	Number of sessional care places in the ward	Number of Registered Childminders located in ward	Number of Registered Childminder Places in the ward	Number of Out of School Childcare Providers located in ward	Number of Out of School Childcare Places in the ward	Total Childcare Places
Aethwy	3	137	0	0	4	35	2	70	242
Bro Aberffraw	0	0	1	16	2	14	0	0	30
Bro Rhosyr	3	109	5	106	1	10	2	43	268
Caergybi	2	56	1	26	2	18	1	30	130
Canolbarth Môn	5	216	4	86	5	41	4	107	450
Llifon	6	201	1	20	3	24	3	76	321
Lligwy	1	17	1	16	5	45	0	0	78
Seiriol	4	122	4	73	3	30	2	44	269
Talybolion	4	75	0	0	2	18	0	0	93
Twrcelyn	2	47	0	0	13	117	1	16	180
Ynys Gybi	5	135	3	74	0	0	0	0	209
Total Anglesey	35	1,115	20	417	40	352	15	386	2,270

4.3 Informal Childcare

Anglesey Family Information Service - Teulu Mon - holds details on informal childcare providers that operate on the island, particularly mother and toddler groups/parent and toddler groups aimed at families that have 0-4 year olds. An example is Mini Rockers is parent and toddler group located in Holyhead where children are encouraged to play and sing.

4.4 Estimated attendance in autumn 2021

Table 3 below indicates the actual number of children who were subsequently accessing/attending a childcare place, aligned to the type(s) of childcare according to the July 2021 SASS responses received.

Table 3 - Number of children attending formal childcare provision(s) across Anglesey in autumn 2021

Source: Source: SASS July 2021

Area	Number of children evidently attending full day care and sessional care	Number of children attending Childminder places ⁶	Number of children attending Out of School Childcare places	Number of children attending Creche places
Anglesey total	1,462	336	380	n/a

4.5 Teulu Môn (Family Information Service) is a free and inclusive service for families on Anglesey. It is the first point of contact for all children, families and professionals for information, advice and assistance relating to children or the families of children, aged 0-25 years.

The FIS helps to source childcare for parents and carers, tailoring their search to take account of their individual needs.

The FIS also provides regular information to childcare providers on training, grants, schemes, as well as any guidance from Welsh Government.

4.6 **Additional Learning Needs**

The July 2021 SASS data indicated that across all of the Isle of Anglesey’s childcare providers - **who responded to that survey** - a total of 120 children with **additional learning needs** were attending a childcare provision.

- 44 (of the responding 94) providers stated that they had at least one child attending their setting that had a cognition and learning disability
- 48 providers stated that they had at least one child attending their setting that had a behaviour, emotional and social development difficulty
- 54 providers stated that they had at least one child attending their setting that had a communication and Interaction difficulty
- 38 providers stated that they had at least one child attending their setting that had a sensory and/or physical disability.

⁶ In June 2021 there were childminders operating who have since de-registered.

4.7 **Welsh-medium provision**

The July 2021 SASS Self Assessment of Service Statement also indicated that 29 of (the 94 responding) childcare providers delivered childcare through the medium of Welsh, as a *main* language.

The only two evident languages that childcare was delivered via was indeed English and/or Welsh, with 41 settings/providers outlining that their setting accounted for both languages.

However, on the relevant and important theme of Welsh-medium childcare, the survey undertaken with Anglesey-based childcare providers in autumn 2021 highlighted that over the next 18 months (i.e. up to spring 2023), 24% of respondents from settings/group-based childcare had plans in place to expand the number of Welsh-medium places that they offered. A lower percentage of registered childminders, at 15%, stated that they had such an intention.

4.8 The **Flying Start childcare programme** for Anglesey covers the localities list below – which also incorporates the number of 2.5 hours/12.5 hours a week commissioned places:

- Gwalchmai locality = 12 commissioned places
- Newborough locality = 24 commissioned places
- Llangefni locality = 48 commissioned places
- Holyhead locality = 100 commissioned places, covered by 3 settings across that town

4.9 **Tax Free Childcare**

From the perspective of another supposed source of support towards access to quality childcare, In response to the consultation that was undertaken with childcare providers in autumn 2021, 58% of early years childcare providers/settings, i.e. full daycare providers and sessional providers stated that they were registered for facilitating parents/carers to access Tax Free Childcare. Those who were not registered repeatedly stated reasons including:

... most frequently: *“I only offer Flying Start funded places”*.

“I don’t know what it is” (stated by a representative of two settings).

Additionally, in autumn 2021, 81% of registered childminders, stated that they were registered for facilitating parents/carers to access Tax Free Childcare. Those who were not registered repeatedly stated reasons *including*:

“I am in the process of registering”

“I do not know what it is”.

In terms of *promoting* Tax Free Childcare, 78% of registered childminders (also) stated that they did actively do so.

Finally, in autumn 2021, 92% of out of school childcare providers stated that they were registered for facilitating parents/carers to access Tax Free Childcare. One representative of a provider that was not registered stated *“we are not registered because we do not offer enough hours”.*

In terms of *promoting* Tax Free Childcare, all but one of the out of school childcare providers (also) stated that they did actively do so.

Switching to the feedback from the July 2021 SASS responses, (a healthy) 59% of the responding full day care providers and sessional providers stated that (to the best of their knowledge) the parents of the children that they care for were (in July 2021) receiving tax free childcare or using childcare vouchers.

4.10 **Part-Time Early Years Education**

As part of the response to the July 2021 SASS process, 58% of early years childcare providers (i.e. full day care providers and sessional care providers) stated that they received funding to provide early years part time education.

4.11 The 2016 Welsh Government Statutory Guidance directs that the Childcare Sufficiency Assessment should summarise the age ranges of children evidently able to attend the range of childcare types – and these metrics are set out in Table 4 below.

Table 4 - Number of **responding** childcare providers that are located in the Anglesey locality which were being accessed by specific age groups of children in July 2021

Source: SASS July 2021

Type of <i>responding</i> childcare provider	Number of settings that were providing formal childcare to 0-12 months and 1 year olds	Number of settings that were providing formal childcare to 2 year olds	Number of settings that were providing formal childcare to 3-4 year olds	Number of settings that were providing formal childcare to 5-11 year olds	Number of settings that were providing formal childcare to 12-14 year olds
Full Day Care (32 respondents)	12	31	32	0	0
Sessional Care (20 respondents)	0	16	17	0	0
Childminder (37 respondents)	22	25	31	24	1
Out of School Childcare (4 respondents)	0	0	4	4	4

4.12 Occupancy

For the survey undertaken in autumn 2021, the Isle of Anglesey County Council invited early years childcare providers to state whether they had a waiting list. (From a demand perspective, only) 10% of early years childcare providers, i.e. full day care providers and sessional providers stated that they had a waiting list (with the most frequent locality/district that a relevant provider was located in Holyhead) and 33% registered childminders stated that they had a waiting list (with the most frequent locality/district that a relevant provider was located in also being the Canolbarth Môn ward).

Table 5 shows the extent to which both types of *relevant* childcare provider stated that their waiting list had changed during the period March 2021 – October 2021.

Table 5 - Extent to which waiting lists had changed during the period March 2021 – October 2021

Source: Anglesey CSA 2021-2022 – structured interviews with childcare providers

Classification	Percentage of relevant early years childcare providers/settings stating	Percentage of relevant registered childminders stating
Yes – it has decreased in size	0	11%
Yes – it has increased in size	50%	33%
No – it has more or less stayed the same	50%	56%

4.13 In autumn 2021, the Isle of Anglesey County Council invited each childcare provider to state whether they had vacant places.

- 50% of early years childcare providers, stated that they had vacant places – most frequently in the Canolbarth Môn ward
- (A lower comparable percentage of) 33% of registered childminders stated that they had vacant places – most frequently in the Twrcelyn ward
- 67% of after school clubs, stated that they had (a non-metrically specified incidence of) vacant places – most frequently in the Llifôn ward
- 60% of non-school based breakfast clubs, stated that they had vacant places

For those early years childcare providers/settings that had vacant places, the average number was 4.2 places. For those registered childminders that had vacant places, the average number was 1 place.⁷

Ultimately Table 6 indicates the feedback that the three types of childcare providers provided aligned to their occupancy:

Type of childcare provider	Stated: Our occupancy has increased for autumn term 2021	Stated: Our occupancy has decreased for autumn term 2021	Stated: Our occupancy is back to normal pre-COVID-19 levels	Stated: Hard to classify our occupancy situation	Did not say
Early Years Childcare	15%	48%	30%	7%	0
Childminder	22%	48%	30%	0	0
Out of School Childcare	31%	23%	46%	0	0

⁷ Out of School Childcare Providers did not tend to feedback their vacancy metrics.

4.14 Fees for paid childcare

The Isle of Anglesey County Council's autumn 2021 survey with childcare providers gave clarification of standard day rates.

For the early years childcare providers/settings who responded – with regard to *fee paying* places:

- the average daily fee for children aged 0-12 months and 1 year was £48.00 and the most frequent daily fee was also £48.00
- the average daily fee for 2 year olds was £17.40 (due to the sessional childcare 'factor') and the most frequent daily fee was (a sessional fee of) £8.00
- the average daily fee for 3 and 4 year olds was £17.40 (due to the sessional childcare 'factor') and the most frequent daily fee was once again (a sessional fee of) £8.00

For the registered childminders who responded – for fee paying places:

- the average daily fee for children aged 0-12 month was £32.30 and the most frequent daily fee was £35.00
- the average daily fee for children aged 1 year was £30.70 and the most frequent daily fee was, once again £30.00
- the average daily fee for 2 year olds was £30.40 and the most frequent daily fee was £35.00
- the average daily fee for 3 and 4 year olds was £35.00 and the most frequent daily fee was £35.00
- the average hourly fee for 5-8 year olds the most frequent *sessional* fee was £12.00

For the out of school childcare providers/settings who responded – for fee paying places:

- the average sessional fee for an after school club was £10.10
- the average sessional fee for a breakfast club was £3.70
- the average daily fee for a holiday play scheme was £32.40

4.15 Opening Times and Accessibility

The Isle of Anglesey County Council's autumn 2021 survey with childcare providers ascertained confirmation on opening times. For the responding early years childcare providers the most frequent opening time was 9.00am, and the average opening time was 8.48am.

The most frequent finishing time was 3:00pm, and the average finishing time was 14:48pm.

For the responding registered childminders the most frequent opening time was 8.00am, and the average opening time was 7.22am. The most frequent finishing time was 18:00pm, and the average finishing time was 17:36pm.

For the Anglesey's number after school clubs the most frequent opening time was 15:00pm. The most frequent finishing time was 18:00 pm.

4.16 In autumn 2021, each childcare provider was invited to state whether they had witnessed or experienced any notable (new) trends in terms of the demand for: (a) types of places that they offered or the; (b) types of hours at their setting.

45% of all early years childcare providers stated that they had, and in order of frequency the repeated trends were:

- Parents requesting more flexibility
- An increase in demand for part-time places for 2 year olds
- An increase in demand for wrap-around care

44% of all registered childminders stated that they had, and in order of frequency the repeated trends were:

- A decrease in demand for full-time places and...
- An increase in demand for part-time places
- A decrease in demand for after school pick-ups

46% of all out of school childcare providers stated that they had, and in order of frequency the repeated trends were:

- A general decrease in demand
- Parents requesting an expansion of opening hours and closing times

5 Needs of Parents/Carers – demand for childcare

The narrative below outlines the results of analysis of the Welsh Government parental survey which had a 5-week response window in October 2021 and early November 2021. This survey was designed by Welsh government, as was its ability to ensure coverage of some the demand-themed factors which the 2016 Welsh Government Statutory Guidance directs should be addressed within a Childcare Sufficiency Assessment.

5.1 The Welsh Government parent survey **286 responses** aligned to Anglesey's wards as follows.

Table 7 - Area of residence of responding parents/carers

Ward name	Number of responding parents/carers	Percentage of Total
Aethwy [EH]	15	5%
Bro Aberffraw	14	5%
Bro Rhosyr	22	7.5%
Caergybi	20	7%
Canolbarth Môn	41	14.5%
Lliffon	16	5.5%
Lligwy	14	5%
Seiriol Talybolion	16	5.5%
Twrcelyn	13	4.5%
Ynys Gybi	16	5.5%
Postcode not specified ⁸	99	35%

5.2 In terms of the type of household(s), the most frequent response provided by responding parents/carers was that they: share responsibility for my child(ren) with someone that I live with (72% of respondents), followed in frequency by a parent/carers stating that I have sole responsibility for my child(ren) - 21% were in fact, single parents.

⁸ Though these respondents did specify that they lived in Anglesey.

- 5.3 The average number of children evidently being raised by all respondents was 1.8 (0.1) *above* the UK average which is 1.7).
- 5.4 The age cohort which responding parents/carers were evidently most frequently raising was 5-8 years (38% of parents stated they were raising a child of this age), followed by 2 years (28%).
- 5.5 5.5% of responding carers stated that they were caring for/raising at least one child with additional learning needs (ALN) or a long-term illness.
- 5.6 All responding parents/carers to the Welsh Government stated what their employment status currently was.

Table 8 - Employment status of responding parents/carers

Status	Percentage of relevant responding parents/carers
Looking for a job – but not working yet	2.5%
Employed	76%
Self-employed	5%
In education or training	4.5%
Not working and not looking for a job	9.5%
Unable to work	2.5%

Note: parents were able to provide multiple responses.

79% of responding parents/carers evidently had a partner and their employment status was described by the respondent as follows:

Table 9 - Employment status of partners

Status	Percentage of relevant responding parents/carers
Looking for a job – but not working yet	0
Employed	67%
Self-employed	8.5%
In education or training	8.5%
Not working and not looking for a job	1%
Unable to work	0
Not relevant (as do not have a partner)	15%

5.7 Table 10 indicates the incidence of responding parents/carers stating their gross household income per week (before deductions/tax).

Table 10 - Incidence of gross household income per week (before deductions/tax)

Weekly household income	Percentage of relevant responding parents/carers	Most frequently stated type of formal childcare accessed during term-time
Up to £100	2%	Cylch Meithrin
£100 to £149	20%	Cylch Meithrin
£150 to £249	10%	Cylch Meithrin
£250 to £349	7%	Cylch Meithrin
£350 to £500	9%	Private Day Nursery
£500 to £580	9%	Private Day Nursery
£581 to £750	10%	Private Day Nursery
£750 to £999	10%	Private Day Nursery
More than £1,000	15%	Cylch Meithrin
Prefer not to say	8%	Private Day Nursery

5.8 Table 11 indicates the incidence of responding parents/carers stating specific ethnic backgrounds.

Stated Ethnicity	Percentage of relevant responding parents/carers
White	98.5%
Mixed/Multiple ethnic groups	1.5%
Asian/Asian British	0
Black/African/Caribbean/Black British	0
Other ethnic group	0
Did not say	0

The most frequent type of 'Mixed respondent was evidently: Mixed White and Black Caribbean (three responding parents/carers).

5.9 73% of *all* responding parents/carers (who would have had at least one 3 and/or 4 year old) stated that they were accessing a funded early education place at school or nursery or a sessional playgroup.

21% of all responding parents/carers stated that they were accessing a Childcare Offer place and 4% of responding parents stated that they intended to access the Childcare Offer in forthcoming years.

5.10 10% of parents who responded to the survey stated that they were accessing a Flying Start programme childcare place. Parents and carers who had a 2 and/or 3 year old, who were both eligible - or not eligible - to access a Flying Start childcare place provided feedback, which included (in order of frequency):

“Because I am using the Childcare Offer instead”.

“It is evidently not available at the nursery which I use”.

*“I am **just** outside a ‘qualifying’ area”.*

5.11 Table 12 below indicates the frequency with which responding parents/carers stated that they used specific types of childcare **during term-times**.

Table 12 - Frequency with which responding parents/carers stated that they used specific types of childcare during term-times

Type of childcare registered or non-registered childcare	Percentage of relevant responding parents/carers
Childminder	4.5%
Before School or Breakfast Club	20%
After School Club	18%
Private Day Nursery	34%
School-based Nursery	8.5%
Sessional Playgroup	4%
Cylch Meithrin	27%
Drop-Off Creche	3%
Nanny	0
Au-Pair	0
Family/friends (paid)	0
Family/friends (unpaid)	45%
Stated <i>none during term time</i>	9%

5.12 Correspondingly, Table 13 below indicates the frequency with which responding parents/carers stated that they used specific types of childcare **during holiday times**.

Table 13 - Frequency with which responding parents/carers stated that they used specific types of childcare during holiday-times

Type of childcare registered or non-registered childcare	Percentage of relevant responding parents/carers	% difference with term time
Childminder	4.5%	No difference
Holiday Club or Playscheme	7%	n/a
Private Day Nursery	29%	-5%
Pre-prep Private School	0	n/a
Sessional Playgroup	0	-4%
Cylch Meithrin	6%	-21%
Drop-Off Creche	3%	No difference
Nanny/Au-Pair	0	No difference
Playscheme	0	No difference
Family/friends (paid)	0.5%	+0.5%
Family/friends (unpaid)	20%	-25%
Stated <i>none during school holidays</i>	22%	+13%

5.13 Each responding parent/carer was invited to state how much they spent on an average week on (paid, non-funded) childcare. Table 14 indicates that the most frequently stated amount was (marginally) £100.00 - £199.99 week, stated by almost 20% of all responding parents.

Table 14 - Incidence of weekly expenditure on childcare

Amount spent on average/week[days]	Percentage of relevant responding parents/carers
£0	28%
Up to £10	2%
£10-£49	16%
£50-£99	14.5%
£100-£199	19%
£200-£299	6%
£300 or over	2%
Did not say	12.5%

The wards which accounted for the highest frequency of parents stating: £300.00 or over/week was the Bro Rhosyr ward, followed in frequency by the Bro Aberffraw ward.

It can be noted that each parent/carer was requested to state whether they received any help towards meeting the cost of their childcare and...

- 8.5% of responding parents/carers stated: (yes, the) childcare element of the Working Tax/Universal Credit
- 22% of responding parents/carers stated: (yes, the) Childcare vouchers⁹/Tax Free Childcare
- 0 responding parents/carers stated: (yes, the) Childcare Grant for Students and;
- 0 responding parents/carers stated: (yes, a) Employer contribution
-

5.14 Each responding parent/carer was invited to state the numbers of hours they used childcare for, on average, on a typical week.

⁹ As distinct from the Childcare Offer – i.e. these are NOT the same programme.

Of those parents who responded to the question:

For term-time:

The average amount of hours stated by Anglesey resident parents/carers was 18 hours and 45 minutes/week. The most frequently stated amount of hours was 30 hours/week, followed in frequency by 10 hours/week.

For holiday-time:

The average amount of hours stated by Anglesey resident parents/carers was 18 hours and 20 minutes/week. The most frequently stated amount of hours was 10 hours/week, and with an equal frequency: 20 hours/week.

5.15 Parents/carers were invited to state how satisfied they currently were with their childcare situation.

Table 15 - Satisfaction levels

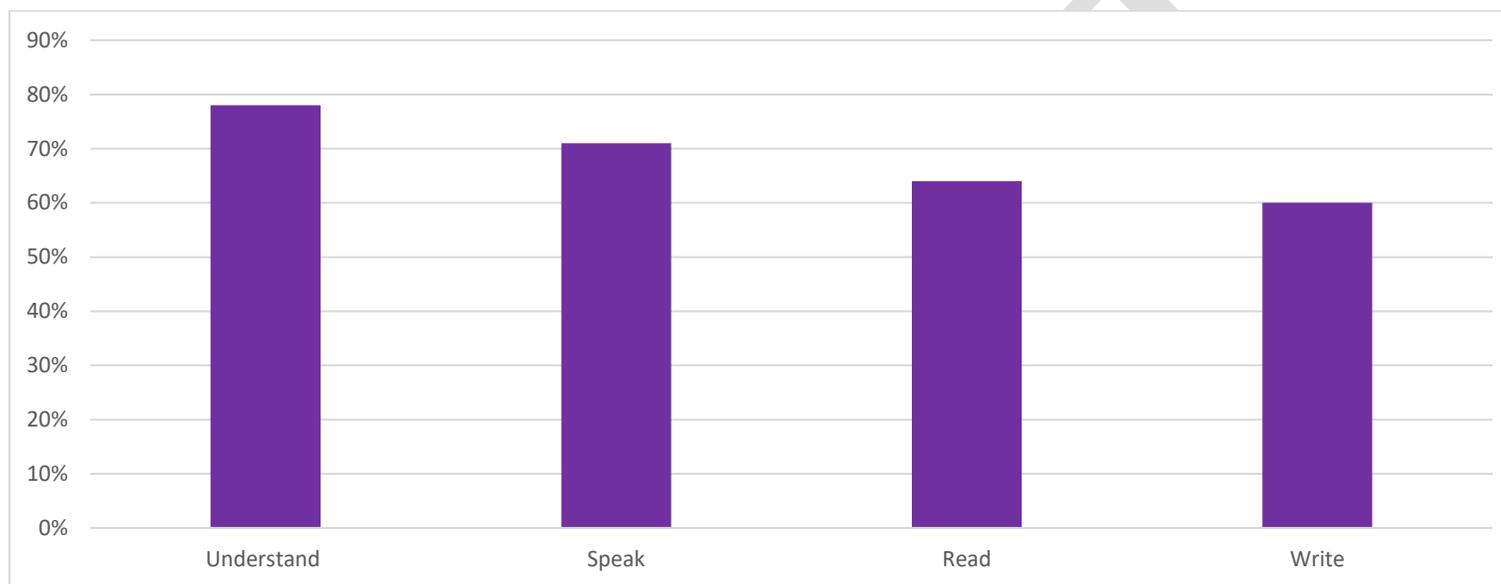
How satisfied a parent/carer was:	Percentage of relevant responding parents/carers
Very Satisfied	64%
Quite Satisfied	17%
Quite Dissatisfied	2%
Very Dissatisfied	1%
(Said) Not applicable	9%
Did not say	7%

Parents/carers who stated:

Quite Dissatisfied or Very Dissatisfied were (proportionally) most frequently resident in the Western area of the island and Holyhead.

5.16 All responding parents/carers were invited to state whether they could speak, read and/or write the Welsh language.

Diagram 1 - Incidence of proficiency in Welsh language



Ultimately, 62% of responding parents/carers stated that they currently accessed childcare through the medium of Welsh. 5% stated that this was something they would ideally like to do, however there were evidently a small incidence of some factors being experienced by a proportion of respondents, with:

- 0.5% stating that distance to a Welsh-medium childcare setting had acted as a barrier to access
- 2% stating that availability to a Welsh-medium place(s) had acted as a barrier to access
- 0 stating that the Welsh-language capability of staff had acted as a barrier to access
- 0 stating that the cost of Welsh-medium childcare had acted as a barrier to access and;
- 1% stating that they had not been able to locate sufficient hours from a Welsh-medium childcare provider.

5.17 All parents/carers who stated that they were not – in autumn 2021 – using any childcare were invited to state why, including via the incidence of barriers. Further details - including qualitative feedback - on this key dynamic and factor can be read in Section 15 of this CSA.

Table 16 - Incidence of reasons stated as to why a parent/carer was not accessing/receiving support with childcare

Reasons/Barriers	Percentage of relevant responding parents/carers
Child is on a waiting list for a provider & we are waiting for a place to become available	<0.5%
I use informal childcare such as a family member or friend	8%
I choose not to access any childcare	<0.5%
I am a stay at home parent and have no need for childcare	4%
My children are old enough to look after themselves	1.5%
There is no childcare with sufficient quality	<0.5%
There is no suitable Welsh Language provision	1%
No suitable provision in our language, which is neither Welsh nor English	<0.5%
The childcare available is not flexible enough for my needs	3%
The cost of childcare is too expensive	7.5%
Childcare times are unsuitable	3%
There is no childcare available that is suitable for my child's age	2%
There is a problem with transport	1%
There is no childcare where I need it to be	1%
There is no childcare that can cater for my child's specific needs	0.5%
I only use childcare on an ad hoc basis and it is impossible to plan	2%
Other	1.5%

'Other'

responses were:

"I am on maternity leave but next term I will be using a childminder and unpaid family childcare".

"There is not enough childcare in the holidays".

5.18 On a similar theme, parents/carers were invited to state whether in the past year, issues surrounding childcare had affected themselves or a[ny] partner:

26% stated that the issue of childcare had: caused problems at work

5.5% stated that the issue of childcare had: prevented continuation of work

9% stated that the issue of childcare had: stopped them from working/getting a job

7% stated that the issue of childcare had: stopped them from accessing training

5.19 All responding parents/carers were invited to state the degree to which they agreed with or (instead) disagreed with a selection of statements about childcare provision.

Table 17 - Parents general thoughts on aspects of childcare in the Anglesey locality

Statement	Strongly Agree	Tend to Agree	Tend to Disagree	Strongly Disagree	Not applicable to me
I am satisfied with my childcare in term time	60%	19.5%	2.5%	0	18%
I am satisfied with my childcare in school holidays	47%	16.5%	4.5%	5%	27%
The quality of childcare is high	61%	18%	2%	0	19%
There is a good choice of childcare in my area	26%	33%	15%	9.5%	16.5%
Childcare is well located	41%	31%	10%	3.5%	14.5%
Childcare caters for my children's needs	48%	26.5%	3%	1.5%	21%
I would like my child to attend more registered childcare	16.5%	18%	15%	16%	34.5%
Childcare is too expensive	48%	26%	7.5%	3%	14.5%
I would prefer to use family/friends for childcare	14%	21%	25%	17%	23%
I have a problem with childcare arrangements that are unreliable	4%	5.5%	19%	38.5%	33%
Childcare is a barrier to me accessing employment or training	12%	14.5%	19%	26%	28.5%
I know where to find out information about childcare	24%	44%	9.5%	7%	15.5%
I know where to find information on financial assistance	16.5%	38%	18%	11%	16.5%

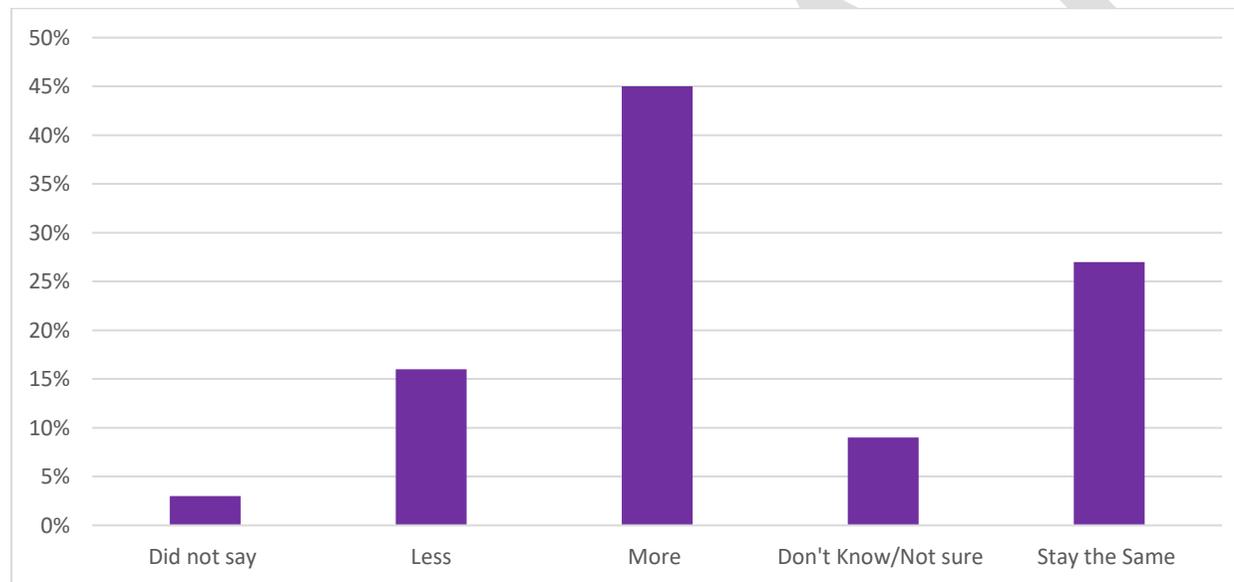
The response *strongly* agree: childcare is too expensive, was most frequently stated by parents/carers who were resident in the Canolbarth Mon ward.

The response - agree: childcare is a barrier to me accessing employment or training, was most frequently stated by parents/carers who were resident in the Bro Aberffraw ward.

The response strongly disagree and tend to disagree with regard to: there is a good choice of childcare in my area was most frequently stated again by parents who resident in the Canolbarth Mon ward, followed in frequency by the Llifon ward.

5.20 An ultimate key response from parents/carers was to the question: Do you anticipate you will need more or less childcare in the next couple of years?

Diagram 2 - Consideration of whether more or less childcare will be accessed in the next 2 years



Those parents/carers who stated: More, were most frequently resident in the Canolbarth Mon ward.

Those parents who stated 'More' were also requested to state the types of childcare that they would indeed seek to access through that intention, with the three most frequent being:

- After School Club – 20% of relevant parents
- Before School/Breakfast Club – 17% of relevant parents
- Cylch Meithrin – 16.5% of relevant parents

DRAFT

6 Outcomes of Consultation with Stakeholders

The Welsh Government Childcare Sufficiency Assessment Guidance 2016 directs that Local Authorities should consult with local stakeholders and partner organisations to attain their perspective on priorities aligned to securing a sufficiency of childcare provision in their area. These stakeholders should include national umbrella organisation that make a key contribution to assisting the local authority, i.e.: the Isle of Anglesey County Council.

Therefore Section A of the 2022 Isle of Anglesey Childcare Sufficiency Assessment outlines feedback that was received through a series of virtual e-interviews with key stakeholders, partners and professionals during late 2021 and early 2022 including representatives of:

- North Wales Safeguarding Board
- Isle of Anglesey County Council employability representatives
- Isle of Anglesey County Council Additional Learning Needs and Wellbeing Team
- Isle of Anglesey County Council Youth Support Services
- Teulu Mon Families Information Service

6.1 Perceived strengths: childcare in the Anglesey locality

- 6.1.1 Two interviewees described their belief that the work and role of the Family Information Service: Teulu Mon was a particular strength for the Isle of Anglesey, in particular aligned to its evolving parameters of support and its ability to connect families with specific providers and forms of support.
- 6.1.2 A second strength was perceived to be that the Childcare Offer had had a notable beneficial effect, in terms of the support it had provided to the island's working families – although two interviewees highlighted how its forthcoming increase in scope (in terms of eligible families) was going to be welcomed, particularly for parents/carers who were adult learners.
- 6.1.3 A third strength that was highlighted by two interviewees was what they perceived to be (words to the effect) *“an ongoing positivity and enthusiasm by those who remain in Anglesey's early years and childcare workforce”*.

6.2 Perceived areas for improvement: childcare in the Anglesey locality

- 6.2.1 Two interviewees stated that they were aware that certain parents/carers had reported issues and problems in terms of locating and accessing suitable Welsh-medium childcare, with this also evidently being a particular theme (barrier to accessing childcare of a parent/carer's choice) that Teulu Mon regularly received enquiries about. One interviewee believed that this issue was particularly aligned to the childminding sector and that this could be the focus of initial work by the local authority to enhance the ability of families to access Welsh medium childcare provision.
- 6.2.2 Two interviewees outlined their understanding that demand for support from a childminder had also been increasing, including aligned to a perception that parents/carers were requiring increased flexibility around times and days. Additionally, these interviewees highlighted their perception that this demand was focused on support for children aged 2-3 years – aka Flying Start programme age-relevant.
- 6.2.3 Three interviewees highlighted an issue that a number of schools on the island did not run an after school club and that this was a potential gap, whereby (working) families that lived in rural areas for which the local school was their “*childcare lifeline*” thus experienced challenges in terms of their work routines and their employability. One interviewee believed that if relevant schools were not able or inclined to establish an out of school childcare facet, then the local authority may have to examine an alternative solution of enhancing transport - in partnership with the local voluntary/community sector – support, so that relevant pupils could reach a school at 3.00pm – 3.30pm which did provide an after school club.
- 6.2.4 Two interviewees outlined how the recruitment and retention issue, that was an evolving problem across the country, was also becoming a key issue on the island, with one such interviewee stating “*there is not exactly a queue of people looking for a job in my sector and this is starting to be a real difficulty*”. Both interviewees (both of whom represented the Welsh-medium childcare sector), highlighted how the organisation that they represented was also having challenges in recruiting volunteers and people to be on committees. One interviewee proposed that within a re-energised recruitment strategy, the local authority should continue to work in partnership with Bangor University and the local FE sector, including around the pivotal need for young people who have an interest in the profession to attain Level 2 and Level 3 qualifications.

6.3 Perceived action/strategic priorities: childcare in the Anglesey locality

- 6.3.1 The majority of interviewees provided feedback that could best be encapsulated by a statement that “*working from home has changed everything*” and that the Anglesey childcare and early years sector had to adopt more of a mind-set that was attuned to a fact that flexibility might need to be more inherent within their delivery models.
- 6.3.2 Two interviewees proposed that relevant officers within the local authority should continue their role in terms of strategic “*horizon scanning*” including attuned to the evolving demographics of the Isle of Anglesey and a fact that the number of second-home owners was increasing, and again how this may have a bearing on themes such as flexibility and the prices of childcare options.
- 6.3.3 In terms of feedback from employers – nationally across Wales there has been an increase in the incidence of employees working from home and *not working* in an office space and environment. This increase in the incidence of ‘flexible’ working from home has meant that some parents/carers have (also) been providing (their own) childcare in their home, particularly for pre-school aged children, as opposed to them using a formal childcare providers, such as full daycare nursery or a childminder.

In November 2021, the Isle of Anglesey County Council focused on attaining feedback from its varied employment sector and widely publicised and promoted an online survey. The employers that responded, including the local RAF Air Base – RAF Valley (which employs 1,800 people) outlined a number of factors and points *including*:

- The incidence of employees working shift patterns was increasing
- Blended working at home or in work – at an average percentage of 50% of employees
- Evident plans that employees were thinking about what they termed “wrap-around support”
- That they had a good understanding of the work and role of Teulu Mon

6.4 Outcomes of Consultation and Young People

In early 2022, the Isle of Anglesey County Council undertook both quantitative and qualitative consultation with children and young people that are resident across the county for the Childcare Sufficiency Assessment and for an associated project: the production of a Play Sufficiency Assessment, which similarly to the CSA, all Welsh local authorities are directed to produce. The quantitative consultation incorporated specific questions aligned to the theme of out of school childcare.

805 primary and secondary cohort pupils responded to an online survey and gave valuable feedback on the theme of out of school childcare. Their *relevant* feedback is summarised below:

6.4.1 Children and young people were invited to respond to a pivotal question: *When you're not in school, what places do you go to play or hang out in?*

Table 18 - Place that children and young people like to go to and hang out: 5-11 years

Places and Activities	Percentage of children and young people responding
Youth Club	4%
Breakfast Club	21%
After School Club	14%
Holiday Club	1.5%
My house or a friend's house	58%
My garden or a friend's garden	39%
In the streets near my house	2%
On a local grassy and green area	28%
In a play area with swings, slides and equipment to play on	39%
In the woods near my house	13%

Places and Activities	Percentage of children and young people responding
On a football field or sports pitch	2%
In my school playground	16.5%
Somewhere with water or sand in it	20%
At the bike or skate park	22.5%
In a hall or leisure centre	10.5%
At an adventure playground or playscheme	10%
At a childminder's	3.5%
Indoor play or soft play centre	20%
Somewhere else	21%

Of those 5-11 year olds that stated after school club: 62% stated that this took place at their school

Of those 5-11 year olds that stated breakfast club: 80% stated that this took place at their school

Of those 5-11 year olds that stated holiday club: 70% stated that this took place at their school

Table 19 - Place that children and young people like to go to and hang out: 12-16 years

Places and Activities	Percentage of children and young people responding
Youth Club	13.5%
Breakfast Club	0
After School Club	14%
Holiday Club	1%
My house or a friend's house	58%
My garden or a friend's garden	10%
Places and Activities	Percentage of children and young people responding

In the streets near my house	32%
On a local grassy and green area	25%
In a play area with swings, slides and other equipment	19%
In the woods near my house	7%
On a football field or sports pitch	21%
In my school playground	5%
Somewhere with water or sand in it	10%
At the bike or skate park	15%
In a hall or leisure centre	1%
At an adventure playground or playscheme	5%
At a childminder's	0
Indoor play or soft play centre	0
Somewhere else	22%

Of those 12-16 year olds that stated out of school club: 38% stated that this took place at their school

Of those 12-16 year olds that stated breakfast club: 0 stated that this took place at their school

Of those 12-16 year olds that stated holiday club: 0 stated that this took place at their school

6.4.2 Children and young people were invited to respond to the question: *Do any of the following types of people ever look after you when you are not at school?*

Table 20 - Types of people that looked after children and young people when they were not at school: 5-11 years

Types of people	Percentage of children and young people responding
Grandparent	53%
Older brother/sister	21%
Someone else in my family	30%
Friends of my mum/dad	18%
Neighbours of my mum/dad	6%
None of the above	10%

Table 21 - Types of people that looked after children and young people when they were not at school: 12-16 years

Types of people	Percentage of young people responding
Grandparent	33%
Older brother/sister	15.5%
Someone else in my family	26%
Friends of my mum/dad	7%
Neighbours of my mum/dad	0
None of the above	15%

6.4.3 Children and young people were invited to respond to an - open ended - question: *is there anything you would like to do during the summer holidays that was not around for you to do this summer?*

Responses that had a theme aligned to what could be considered traditional holiday-time activities that were stated, were, in order of frequency:

“A water park, with water slides”.

“Going swimming”.

“Going to a summer camp”.

“Playing in football tournaments”.

“Going paddle-boarding”.

“Going to the beach”.

DRAFT

6.4.2 Finally, with relevance to this *Childcare Sufficiency Assessment*: Children and young people were asked: *Thinking about COVID-19, what, if anything, says what you think?*

Table 22 - What children and young people aged 5-11 think about COVID-19

Response	Percentage of children and young people responding
I feel something else different to the below	5%
I don't really think about it!	28%
I do think about it - but it won't stop me from going to clubs and activities	32%
I am worried about it - it might make me think twice about going to clubs	17%
No response	18%

Table 23 - What children and young people aged 12-16 think about COVID-19

Response	Percentage of young people responding
I feel something else different to the below	9%
I don't really think about it!	18%
I do think about it - but it won't stop me from going to clubs and activities	25%
I am worried about it - it might make me think twice about going to clubs	14%
No response	36%

6.5 Outcomes of Consultation with Schools

The Welsh Government Childcare Sufficiency Assessment Guidance 2016 directs that Local Authorities should consult with their local stakeholders and that this should include local schools.

On the Isle of Anglesey, there are 40 primary schools, 5 secondary schools and one special school, which further lists as follows:

- 1 English-medium primary school
- 38 Welsh-medium primary schools
- 1 Dual-stream primary school
- 1 English-medium primary schools
- 3 Dual-stream secondary school
- 1 Special School: Ysgol Y Bont

In January 2022, all of the schools located on the Isle of Anglesey were invited to complete an online survey which focused on the theme of childcare and views on specific themes associated with the subject. A total of 16 schools (35%) submitted a response to the online and their collective feedback is summarised below.

Table 24 - Identity of responding schools

School	Ward
Ysgol Gymuned Bryngwran	Canolbarth Môn ward
Ysgol Gynradd Kingsland	Ynys Gybi
Ysgol Uwchradd Caergybi	Caergybi
Ysgol Gynradd Santes Gwenfaen - Rhoscolyn	Ynys Gybi
Ysgol Gynradd Llanbedrgoch	Lligwy
Ysgol y Graig	Canolbarth Môn
Ysgol Gymuned Y Ffridd	Canolbarth Môn
Ysgol Gynradd Llangoed	Seiriol

School	Ward
Ysgol Gynradd Cemaes	Twrcelyn
Ysgol Gymuned Bodffordd	Canolbarth Môn
Ysgol y Tywyn	Llifôn
Ysgol Gynradd Amlwch	Twrcelyn
Ysgol Corn Hir	Canolbarth Môn
Ysgol Santes Dwynwen	Bro Aberffraw
Ysgol Esceifiog	Bro Rhosyr
Ysgol Gynradd Llandegfan	Seiriol

6.5.1 All (representatives of) schools were invited to state if they had childcare situated at their site. 94% stated that they did and Table 25 presents the frequency with which specific types of childcare were stated.

Table 25 - Frequency with which specific types of formal childcare were situated at schools

Type of childcare	Percentage of schools with this childcare on site
After School Club (school run)	25%
After School (privately run)	25%
Nursery Wrap Around	25%
Playgroup/Cylch Meithrin	56%
Holiday Childcare	19%
Free Breakfast Club	94%
Fee Payable Breakfast Club	81%
Flying Start childcare places	19%
Other ¹⁰	19%

Table 25 outlines that a free (of charge) breakfast club is the most frequent type of formal childcare that is situated *at a school* on the Isle of Anglesey. This was followed in frequency by a fee payable breakfast club.

¹⁰ Other responses were - A *quarter-hour* club for Foundation Phase children; After school Medra care club; a *facilitation club*.

6.5.2 All representatives of *relevant* schools were invited to state whether they believed it was beneficial (for their school) to have childcare on-site: Approximately 81% of schools said that this was the case¹¹, with just one stating that they *did not* find it beneficial, and that is a reason why they had worked with local childcare providers to initiate their services off site. Other specific feedback on the subject of having childcare on-site *included*:

“We find that children familiarise themselves with the location and settle in more easily”.

“Having everything on the same site makes things much easier. Our school staff work at the club, so there is a continuous service after the school closes”.

“Having care provision allows parents to go to work. We find that grandparents often work now too - so this option is not available”.

“We find that it comes down to parental convenience – and they will choose a school based on this”.

6.5.3 Half of the representatives of schools asked stated that COVID-19 had, to a significant extent, affected the ability of their childcare to operate, with the most frequent reason being that clubs had to close down during the lockdowns.

6.5.4 Returning to the theme of school drop-offs and pick-ups, Table 26 indicates the frequency with which specific providers worked with a school to action this.

¹¹ Two schools did not answer this question

Table 26 - Frequency with which specific types of formal childcare providers actioned drop-offs and or pick-ups

Type of childcare	Percentage of schools that denoted they worked with such a provider to action a drop-off or a pick-up
Childminder(s)	50%
Day Nursery(s)	38%
Playgroup/Cylch Meithrin	31%

6.5.5 All representatives of schools were invited to state whether – in their personal opinion/experience – whether there was need for more of specific types of childcare places in their local/immediate area. Table 27 presents their collective responses.

Table 27 - Frequency with representatives personally believed that there was a 'need' for more types of childcare in their school's local area

Type of childcare	Percentage of representatives of schools that stated Yes	Percentage of representatives of schools that stated No	Percentage of representatives of schools that stated Don't Know
After School Club	38%	31%	6%
Nursery Wraparound	44%	13%	13%
Playgroup/Cylch Meithrin	19%	38%	6%
Holiday Childcare (No Playscheme)	69%	13%	0
Free Breakfast Club	6%	56%	0
Flying Start childcare places	25%	13%	25%

Table 27 indicates that holiday childcare is what representatives of schools believed (in their personal opinion) there was most need for further places.

6.5.6 All representatives of schools were invited to state whether – to the best of their knowledge – their school site may have an[y] available space at which a new childcare provision could potentially be established: 44% answered that it did (with two of these schools also being located in the Seiriol Talybolion ward) and qualifications to this response, *included*:

“The nursery class has recently been modernized and extended. It is a lovely space with a toilet and cooking facilities as well as a safe outdoor area for children to play and hang out”.

“We have classrooms that could provide childcare facilities after school, including clubs and play areas...”.

“We have two community rooms available for three days a week. We have a Flying Start room (which caters for the children of Newborough) which is empty from 11:30 every day”.

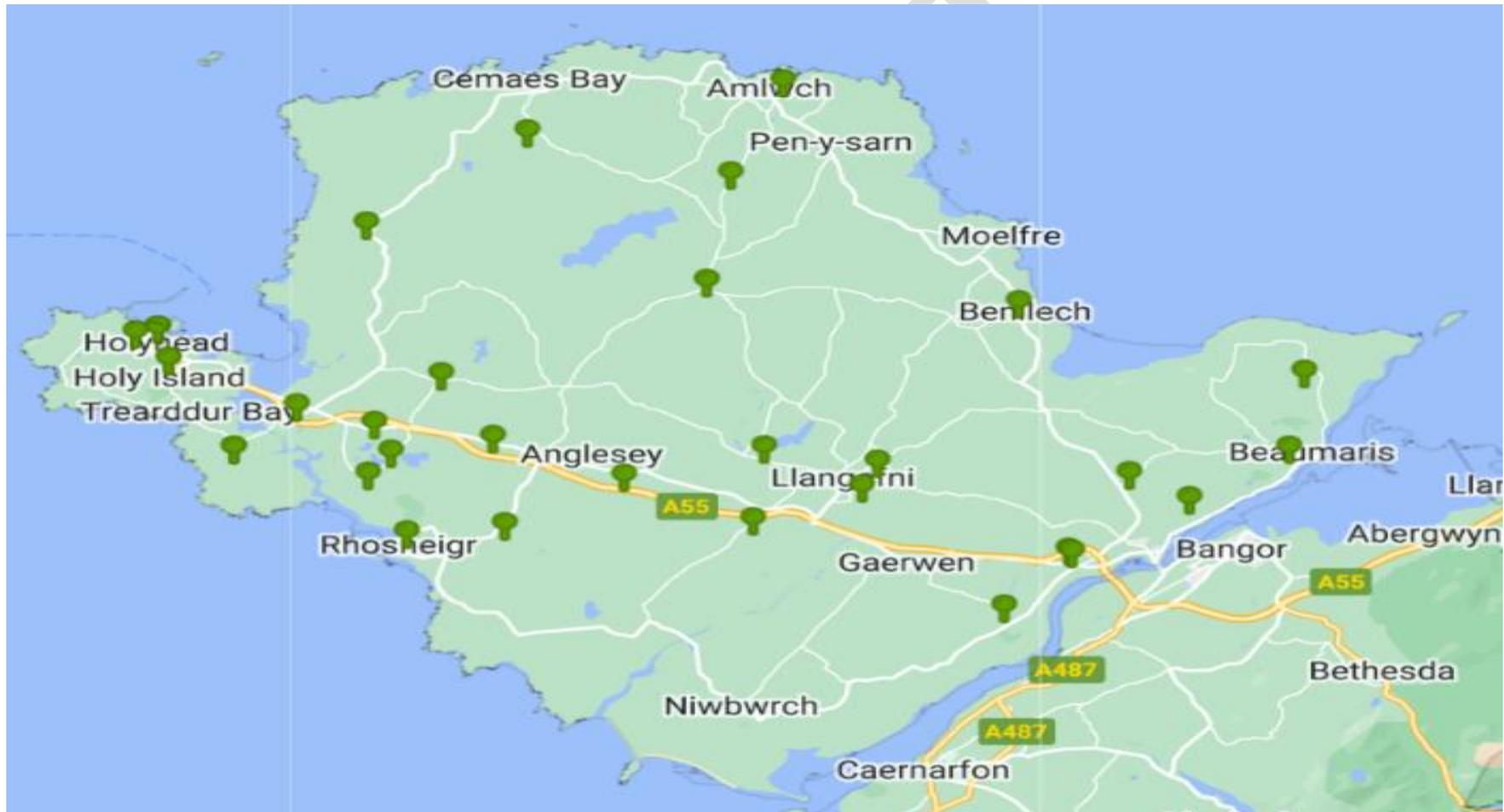
Six of the seven respondents that answered in the affirmative, confirmed that they would be pleased to receive advice and support with such a potential development.

6.5.7 All representatives of schools were invited to state whether they were aware of the existence of the Family Information Service. 44% stated they were aware of the Isle of Anglesey Family Information Service - and 56% evidently were not.¹²

¹² Two schools did not respond to this question.

7 Geographical Distribution

7.1 Image 1 - Location of Full Day Care Providers on the Isle of Anglesey



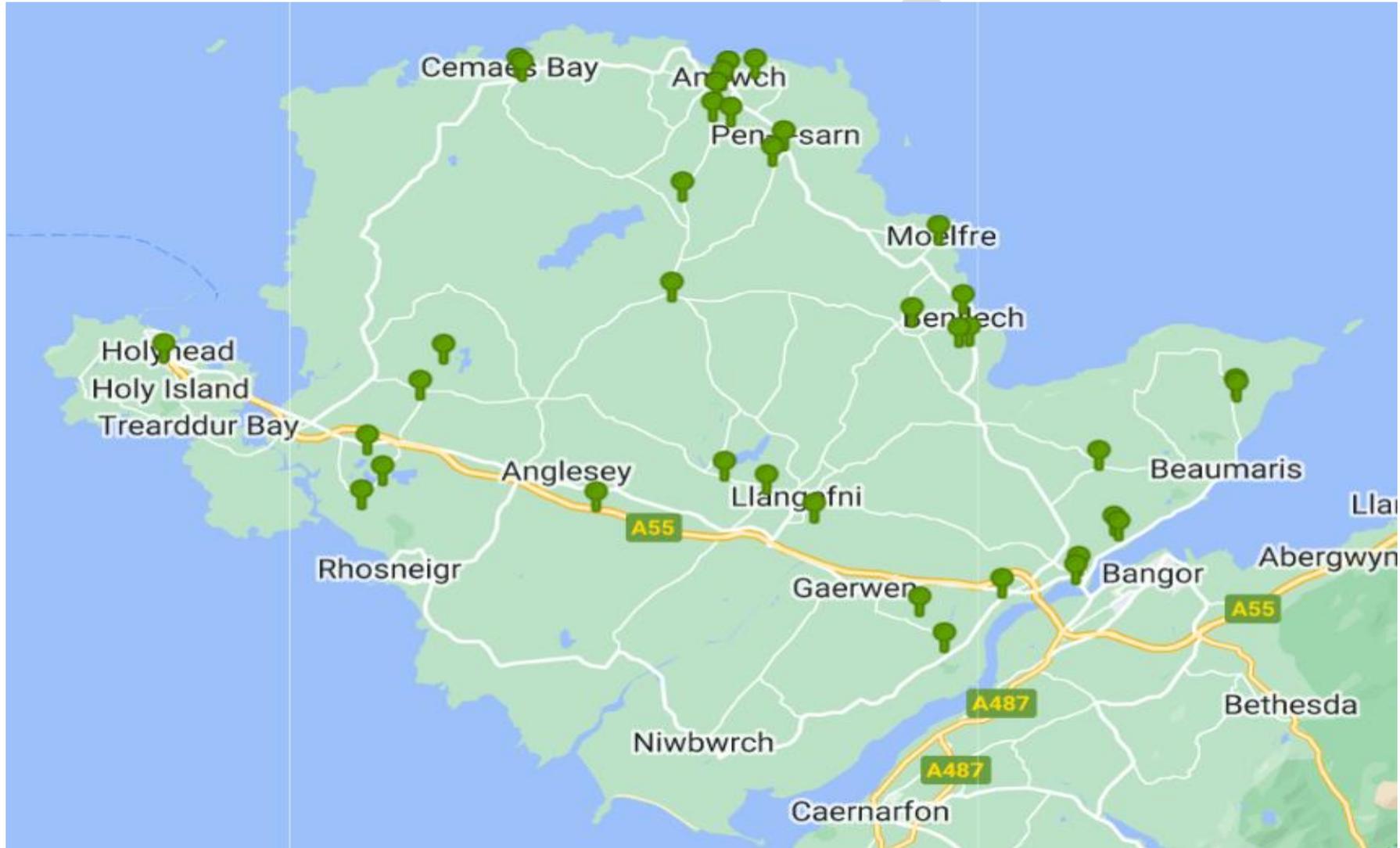
7.2 Image 2 - Location of Sessional Care Providers on the Isle of Anglesey



7.3 Image 3 - Location of Registered Childminders on the Isle of Anglesey



7.4 Image 4 - Location of Out of School Childcare Providers on the Isle of Anglesey



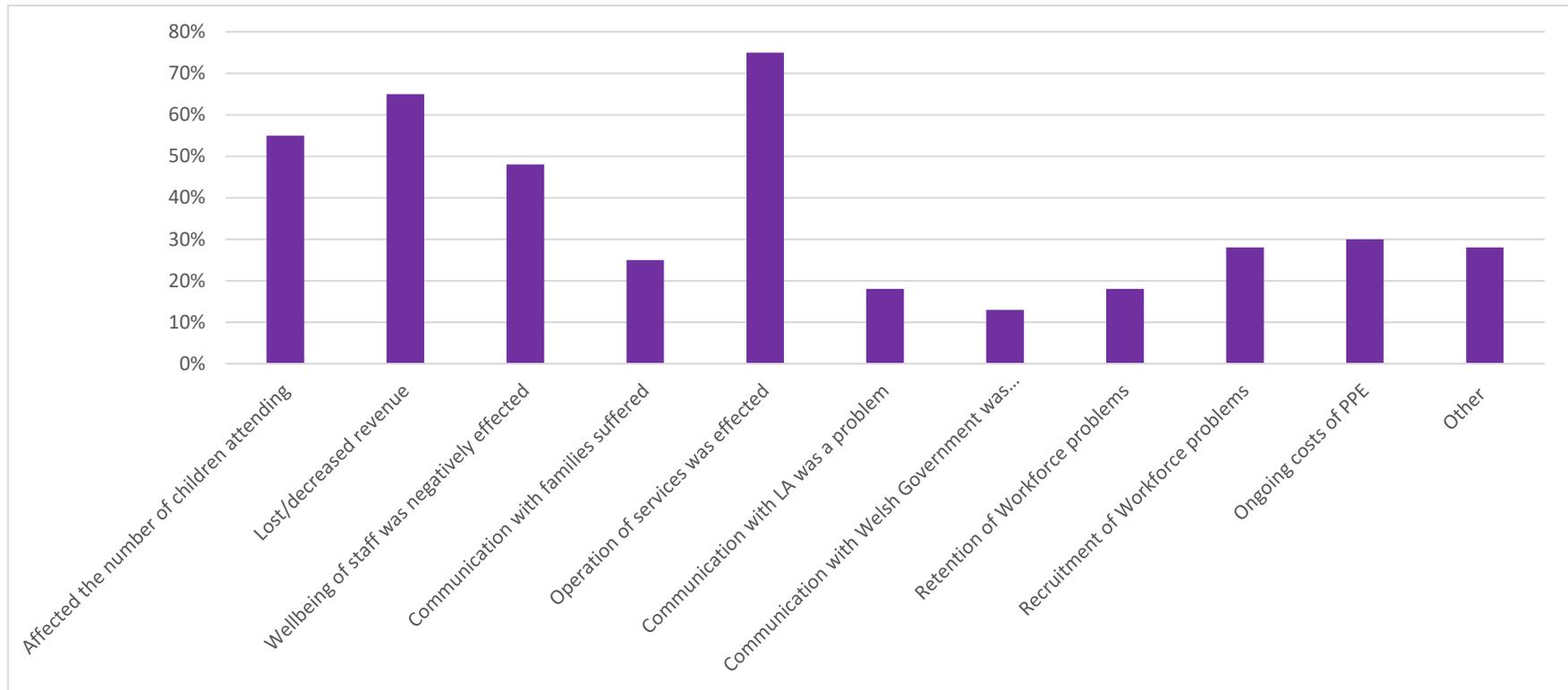
8 Sustainability

The narrative and analysis below presents outcomes of the autumn 2021 structured survey with Anglesey's number childcare providers across the Anglesey locality which focus on the theme of sustainability, including a review of how sustainability funding evidently supported the sector.

- 8.1 As part of County Council's survey with early years childcare providers/settings in autumn 2021, each setting was invited to state if their business experienced (or continues to experience) issues as an outcome of COVID-19.

Diagram 3 - Incidence of issues being experienced by early years childcare providers/settings as an outcome of COVID-19

DRAFT



The ward that accounted for the highest incidence of a provider stating 'lost/decreased revenue' was: Canolbarth Môn
 The ward that accounted for the highest incidence of a provider stating 'affected the number of children' was also Canolbarth Môn.

Diagram 4 - Incidence of issues being experienced by registered childminders as an outcome of COVID-19

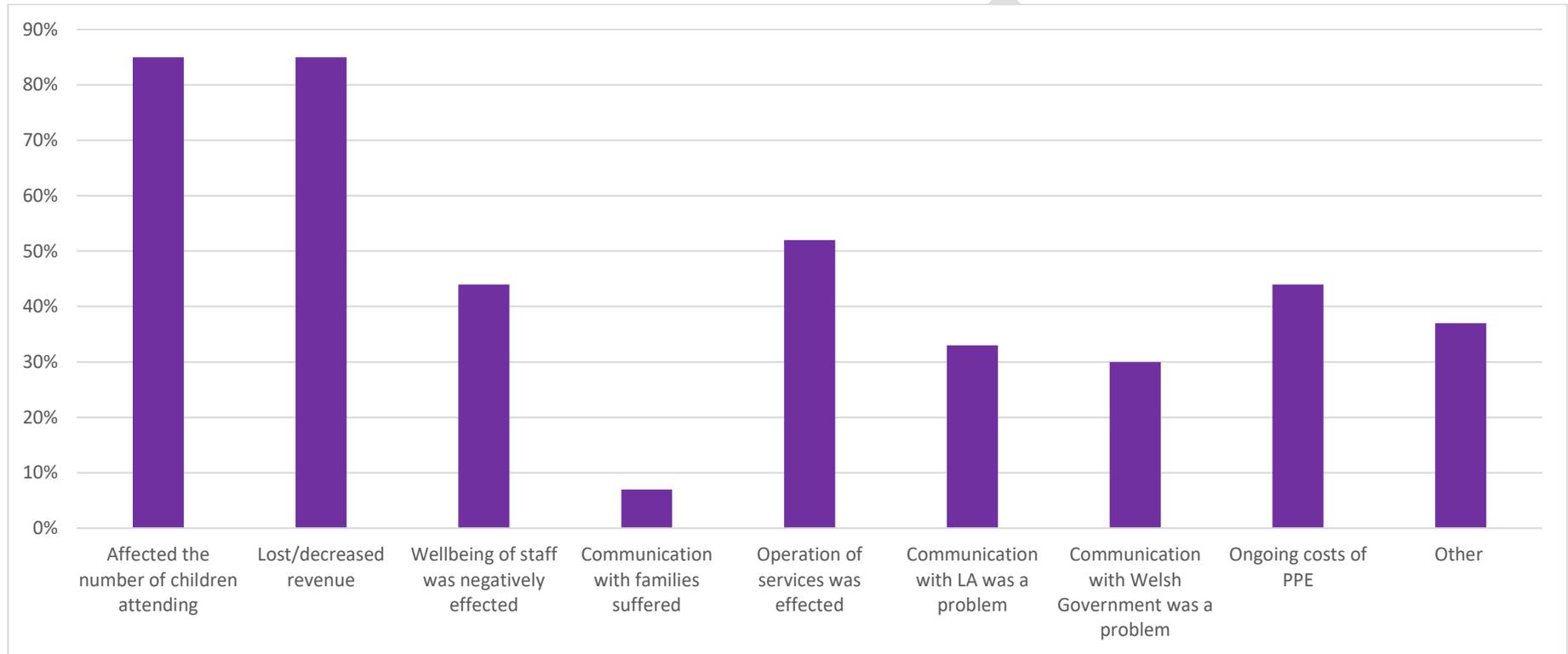


Diagram 4 shows registered childminders most frequently outlined how they had ‘lost/decreased revenue’ as an outcomes of the COVID-19 pandemic – and with an equal frequency it affected their number of attendees.

8.2 Only 25% of early years childcare providers/settings stated in autumn 2021 that they had to change their business model as an outcome of the COVID-19 pandemic – with the most frequent response being that they had “*decided to be open for a fewer hours*”, followed in frequency by a decision to not be open on a certain mornings.

Finally, 15% of registered childminders stated in autumn 2021 that they had to change their business model as an outcome of the COVID-19 pandemic, with repeated adaptations being:

- Childminder started to take less children
- Childminder introduced greater flexibility aligned to their hours and sometimes reduced their hours
- Childminder decided to increase fee levels

All of Anglesey's childcare providers were subsequently invited to state whether they/their setting would benefit from advice, support and/or training with short and/or medium term business modelling. 20% stated that they would and:

- 7.5% (of all responding childcare providers) stated that they would welcome support, training and advice with business modelling and sustainability strategies
- 7.5% also stated that they would welcome support, training and advice with traditional marketing
- 9% stated that they would welcome support, training and advice with virtual marketing.

8.3 15% of Anglesey's early years childcare providers stated that they had some type of plan(s) to continue to energise income generation - other than via getting back to a pre-COVID-19 occupancy levels. *Repeated* plans were:

- Undertaking fundraising campaigns such as "discos" and "fundraising"
- Undertaking a flyer/leafletting campaign
- Extend session times.

8.4 Each of the Isle of Anglesey locality's formal early years setting/group-based childcare providers – i.e. full day care providers and sessional care providers – were also asked in autumn 2021 whether they had any plans/intentions to increase their capacity/develop new provision over the forthcoming two years. Six early years childcare providers stated that they did have.

- Four of these providers were situated in the Canolbarth Mon ward and between them had an ambition to develop 90 new places
- One provider was situated in the Llifon ward and had an ambition to develop 5 new places and;
- One provider was situated in the Ynys Gybi ward and had an ambition to develop 12 new places

8.5 In autumn 2021, (only) 7.5% of Anglesey's formal: (a) early years childcare providers and (b) out of school childcare providers stated that they had accessed the Coronavirus (COVID-19) Business Interruption Loan Scheme.

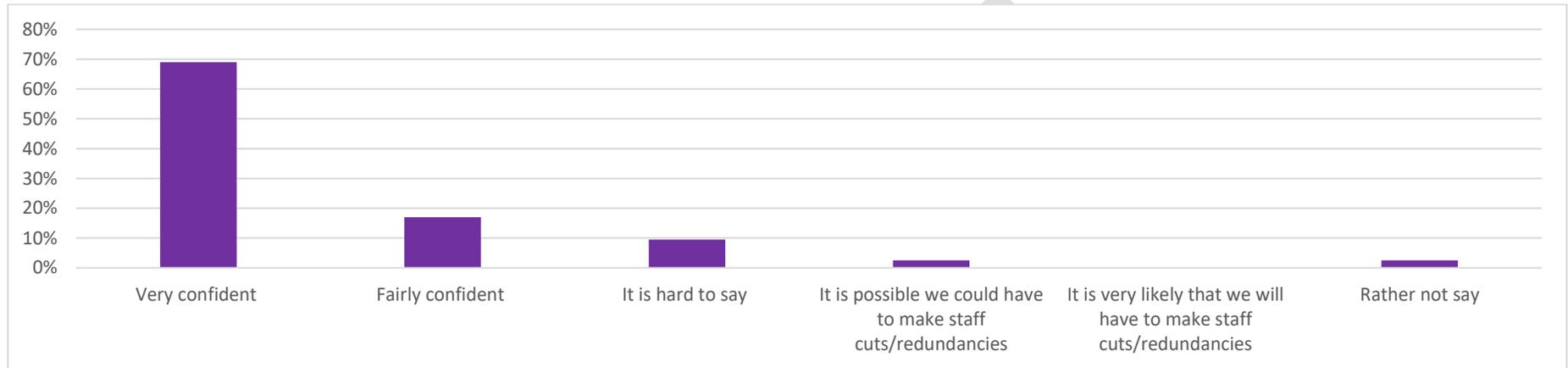
(A slightly higher percentage at) 13% of Anglesey's formal (a) early years childcare providers and (b) out of school childcare providers also stated that they had accessed the Coronavirus Bounce Back Loan Scheme.

8.6 However (significantly more), 79% of Anglesey's formal: (a) early years childcare providers and (b) out of school childcare providers stated that they had accessed the (pivotal) Coronavirus Job Retention Scheme (CJRS).

8.7 ...All *relevant* (see 8.6 above): a) early years childcare providers and (b) out of school childcare providers were requested to state how confident they were in autumn 2021 that they would be able to retain their current staff team as an outcome of the conclusion of the Coronavirus Job Retention Scheme.

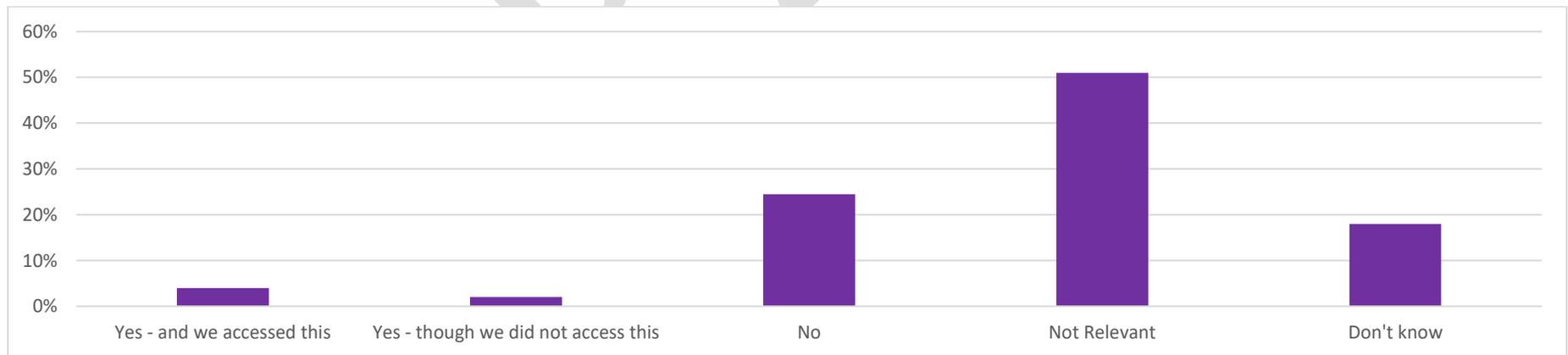
DRAFT

Diagram 5 - Levels of confidence in retaining staff



8.8 Subsequently, Diagram 6 below indicates responses that were received from: (a) early years childcare providers and (b) out of school childcare providers about (their understanding about) eligibility for the Business Rates Relief/Holiday due to COVID-19.

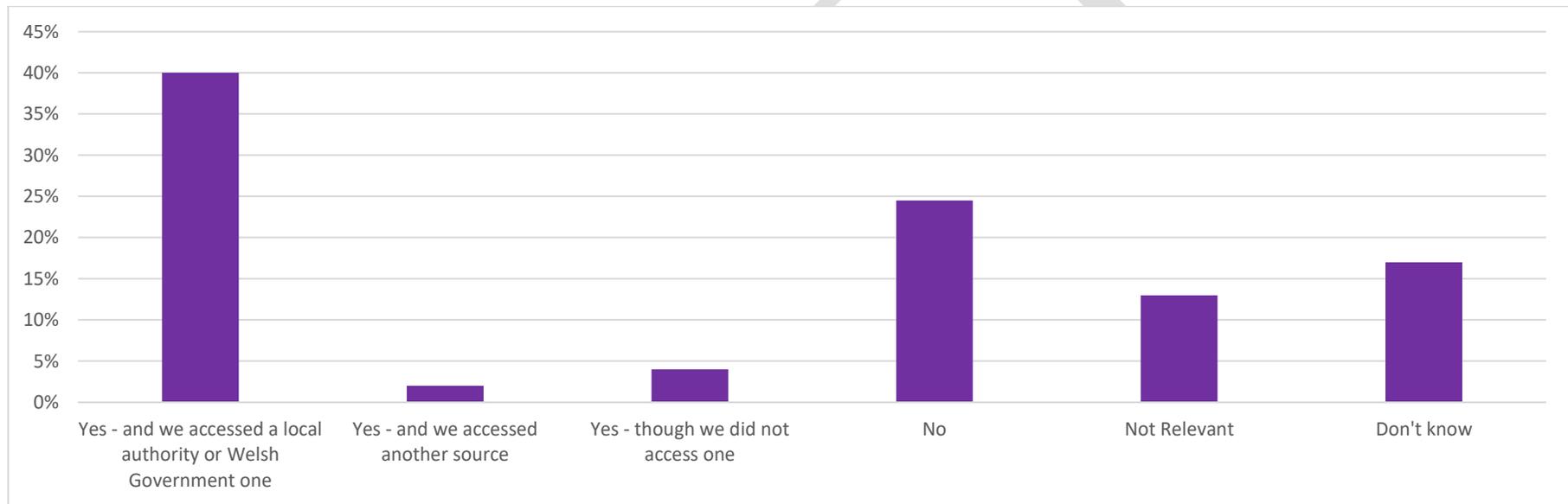
Diagram 6 - Responses from Anglesey's settings and groups about eligibility for the Business Rates Relief



It can also be noted that (only) 9.5% of responding (relevant) early years childcare providers and out of school childcare providers stated that they were aware that the Business Rates Relief scheme was extended for 3 years until March 2025. The other 90.5% stated that they were not aware of this fact.

8.9 Setting-based childcare providers were asked if they had received a sustainability grant.

Diagram 7 - Feedback on sustainability grants



In order of frequency the origins of the grants that were accessed were:

- Isle of Anglesey County Council – Childcare Sustainability Grant
- Childcare Offer Capital Grant
- <https://moondancefoundation.org.uk/>

Feedback about grants from settings/groups was positive and included:

“I used the payment for PPE and extra cleaning costs”.

“We would not have survived without that grant from the Local Authority – it was essential”.

“The payment was helpful in sustaining our business”

8.10 In autumn 2021, all childcare providers were invited to confirm a length of time aligned to how long they expected to continue to be providing childcare:

Diagram 8 - Responses from : (a) early years childcare providers and (b) out of school childcare providers on length of time they expected to continue in business

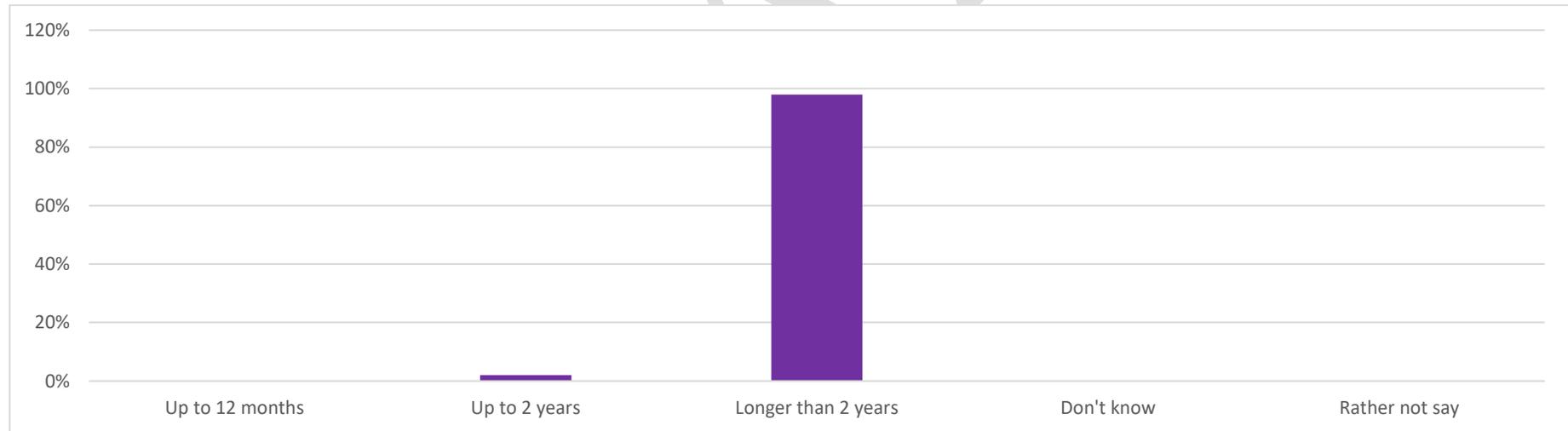
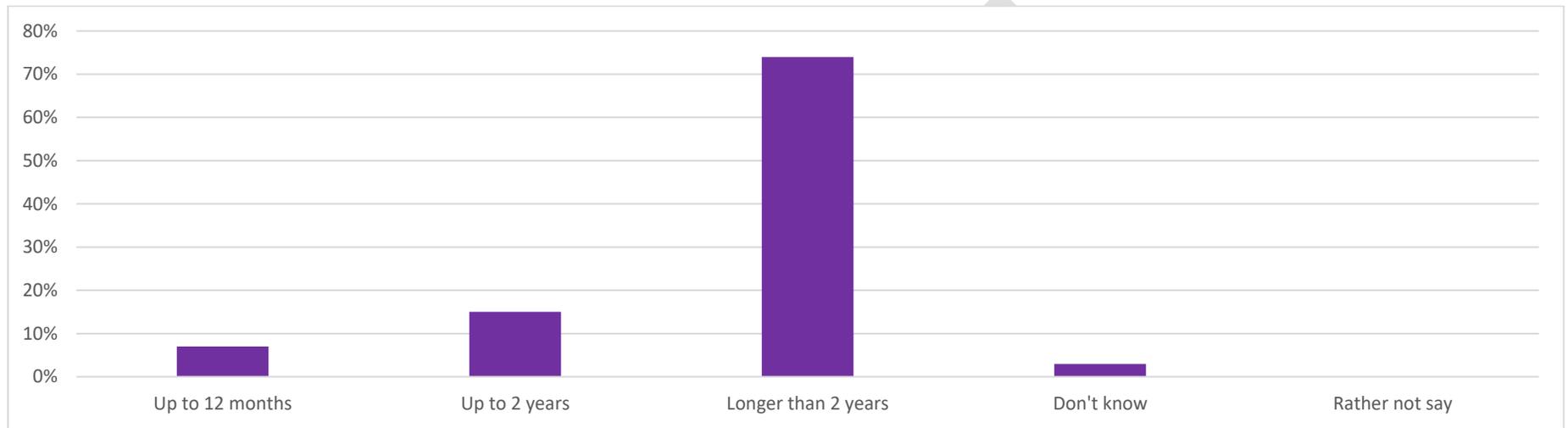


Diagram 9 - Responses from registered childminders on the length of time they expected to continue in business



DRAFT

8.11 Early years childcare providers and out of school childcare providers were invited to summarise details on plans aligned to **sustainability** over the next 18 months (up to spring 2023).

Table 30 - Incidence of plans aligned to the theme of ongoing sustainability and support to families, up to spring 2023 (early years childcare providers and out of school childcare providers)

Increase your fees for paid places/provision?		
Yes plans in place = 41%	No plans, but maybe = 36%	No plans – will not happen/ No Response = 23%
Further enhance provision for children with additional learning needs?		
Yes plans in place = 49%	No plans, but maybe = 43%	No plans – will not happen/ No Response = 8%
Extend your opening hours?		
Yes plans in place = 19%	No plans, but maybe = 11%	No plans – will not happen/ No Response = 70%
Expand the number of Welsh-medium places that are offered?		
Yes plans in place = 24%	No plans, but maybe = 17%	No plans – will not happen/ No Response = 59%
Help better meet the needs of shift workers/those who work outside typical office hours?		
Yes plans in place = 7.5%	No plans, but maybe = 7.5%	No plans – will not happen/ No Response = 85%

Table 31 - Incidence of plans aligned to the theme of ongoing sustainability and support to families, up to spring 2023 (childminders)

Increase your fees for paid places/provision?		
Yes plans in place = 33%	No plans, but maybe = 48%	No plans – will not happen/ No Response = 19%
Further enhance provision for children with additional learning needs?		
Yes plans in place = 15%	No plans, but maybe = 63%	No plans – will not happen/ No Response = 22%
Extend your opening hours?		
Yes plans in place = 4%	No plans, but maybe = 15%	No plans – will not happen/ No Response = 81%
Expand the number of Welsh-medium places that are offered?		
Yes plans in place = 19%	No plans, but maybe = 19%	No plans – will not happen/ No Response = 62%
Help better meet the needs of shift workers/those who work outside typical office hours?		
Yes plans in place = 22%	No plans, but maybe = 15%	No plans – will not happen/ No Response = 63%

8.12 Essentially, all (representatives of) Anglesey-based childcare settings/group providers were invited to state what their setting would most welcome as **continued** support, advice and guidance from the Council during 2022. The two repeated types of feedback were (in order of frequency):

1. Continuing to keep providers aware about *financial support* and *sustainability grants*
2. Help with staff recruitment

Additionally all childminders were invited to state what their setting would most welcome as **continued** support, advice and guidance from the Council over the year 2022. The three repeated types of feedback were (in order of frequency):

1. Keeping childminders aware about *financial support* and *sustainability grants*
2. Help and advice about enhancing their provision of outside play
3. Continued advice about the availability of training courses – on themes including

“Supporting children with ALN”.

“Supporting the transition to primary school”.

8.13 Finally, with regard to theme of sustainability, it can be noted that during the period March 2020 – March 2022:

- In terms of **early years childcare provisions**, there were *insert* new CIW registrations and *insert* CIW de-registrations within the Anglesey locality
- In terms of **registered childminders**, there were *insert* new CIW registrations and CIW *insert* de-registrations within the Anglesey locality and;
- In terms of **out of school childcare provisions**, there were *insert* new CIW registrations and CIW *insert* de-registrations within the Anglesey locality.

DRAFT

9 Cross Border analysis

- 9.1 It should be noted that the Isle of Anglesey only shares a border with one other local authority – which is of course Gwynedd. The Isle of Anglesey County Council and Cyngor Gwynedd liaise closely, including on the development of joint strategic plans.
- 9.2 In response to the Welsh government parental survey in October 2021: (only) two responding parents that were evidently resident on the Isle of Anglesey stated that they accessed a funded early education place in a different local authority area: which was Gwynedd.
- 9.3 Anglesey Family Information Services (Teulu Mon) continues to hold details of childcare providers and service providers based within their Local Authority area and to work very closely with neighbouring FIS's and has signposted families to their counterparts in other areas.

DRAFT

10 COVID-19

The Isle of Anglesey witnessed COVID-19 presenting huge challenges for the locality's early years and childcare sector.

Pertinently, the report, National Conversations with the Childcare, Play and Early Years Sector in Wales, published in September 2021 outlined how

childcare, play and early years workers felt undervalued and underappreciated during the COVID-19 pandemic.

The report – which focused on a number of themes that affected the early years and childcare sector, including staff well-being and morale, the support available to businesses, staffing, and training and qualifications – outlined how the sector felt the communication they received from Welsh Government during the pandemic wasn't always clear and they didn't always feel their voices had been heard. Essentially the report concluded that *“communication with the sector was frequent, but due to the ever-changing COVID-19 landscape not all the messages were heard”*.

Essentially, a number of Wales-based early years and childcare providers told researchers they had experienced some issues with staffing and had concerns about sustainability...

- 10.1 National research undertaken during the period 2020 – early 2022 showed that the mental health and wellbeing of: (a) proprietors and
(b) staff at all levels within the childcare businesses was being affected by the challenges created by COVID-19.

As part of the autumn 2021 survey with Isle of Anglesey locality-based childcare providers, the local authority asked whether respondents had seen any examples of COVID-19 related mental health problems, including aligned to stress and anxiety about (COVID-themed) sustainability?

39% of actual respondents representing childcare providers (typically childminders, proprietors and managers) stated that they had personally experienced mental health challenges and/or anxiety.

40% of relevant respondents stated that there had been examples of team members experiencing mental health challenges and/or anxiety.

Feedback from childminders and representatives of such early years childcare and out of school childcare providers *included*:

“A resource where we knew we could get help would have been good, but the Council did offer very good support”.

“I attended mind and wellbeing training and this was helpful”.

“Childminding is often lonely and buddying schemes may have helped”.

10.2 All childcare providers were invited to state how they would broadly classify how their parents/families were feeling in terms of their child(ren) (re)attending your setting, aligned to COVID-19.

98% of respondents stated that: The majority seem to be happy now, with the remaining (only) 2% stating: it is a fairly even split between those in favour, and those with continuing concerns.

10.3 Additionally, the July 2021 SASS Self Assessment of Service Statement responses highlighted how:

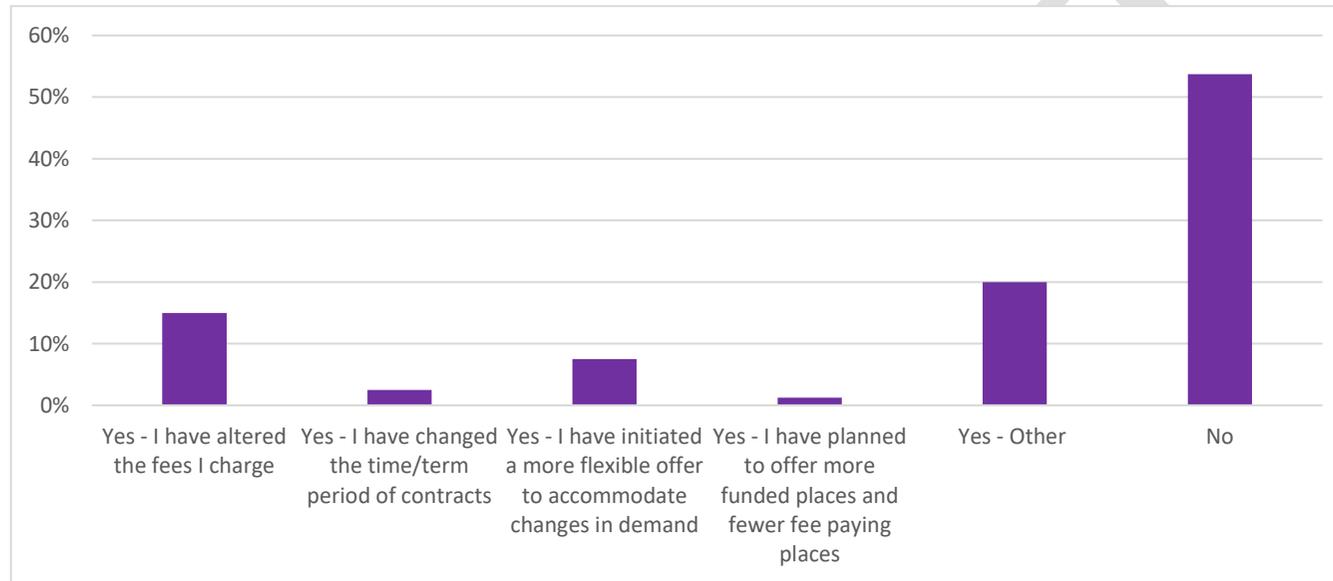
96% of responding childcare providers stated that they had had to close at some point in time – up to that date – as a result of COVID-19.

11% of responding childcare providers stated that they had seen positive case(s) of COVID-19 before July 2021, with 36% of such providers stating that they had had at least one staff member that had contracted COVID-19 (too, as well as the[ir] children).

10.4 70% of all childcare providers stated that, in July 2021, they were not operating at full capacity as a result of COVID-19.

10.5 All childcare providers that responded to the autumn 2021 survey were requested to state whether they made any contractual changes with any parents/carers as a result of COVID-19?

Diagram 10 - Incidence of contractual changes made by Anglesey childcare providers aligned to COVID-19



10.6 All childcare providers that responded to the autumn 2021 survey were requested to state whether they would welcome any further advice or support in terms of a COVID-19 ‘protect your setting’ policy/risk assessment, or a staff and parent policy/protocol. (Only) 6% stated that they would - and the requests from these childcare providers included:

“Continued advice on undertaking a risk assessment”.

“If COVID-19 happens again to have a checklist, like I think schools receive?”.

11 Population, Demographics and Socio-Economic Profile

11.1 Table 32 outlines the population of 0-14 year olds aligned to each LSOA in the Anglesey locality as forecast by the ONS Mid-2020 Population Estimates for 2020 Wards and 2021 LAs in Wales.

Table 32 - Population of 0-14 year olds in Anglesey LSOAs
Mid-2020 Population Estimates for 2020 Wards (ONS)

LSOA Code & Name	0-12m	1 year	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years	10 years	11 years	12 years	13 years	14 years	15 years	16 years	17 years	18 years
W01000001 Aberffraw & Rhosneigr 1	5	9	11	10	12	11	8	6	8	10	4	5	3	2	9	5	13	8	15
W01000002 Aberffraw & Rhosneigr 2	11	8	9	11	11	16	12	23	10	9	8	7	12	12	11	10	8	9	6
W01000003 Amlwch Port	26	21	28	32	23	22	36	27	36	37	27	28	28	31	27	20	22	26	27
W01000004 Amlwch Rural	11	10	13	10	12	11	13	8	8	13	8	17	13	15	8	12	12	13	13
W01000005 Beaumaris	10	17	12	20	14	25	16	14	14	7	12	9	13	9	15	21	20	16	13
W01000006 Bodffordd	15	8	10	20	16	18	15	19	19	13	15	15	14	7	17	14	14	17	16
W01000007 Bodorgan	14	14	11	14	13	22	19	19	20	25	13	18	14	14	12	19	25	16	19
W01000008 Braint	7	7	7	8	9	8	22	10	25	24	14	22	14	13	13	19	14	12	17
W01000009 Bryngwran	12	21	26	21	31	24	28	26	30	27	27	22	23	23	19	20	18	23	25
W01000010 Brynteg	13	14	12	18	13	17	20	9	17	16	11	17	16	28	13	9	10	18	15
W01000011 Cadnant	5	4	6	9	6	6	5	11	2	5	7	5	11	5	6	12	7	13	5
W01000012 Cefni	10	11	18	19	14	18	30	17	28	20	26	23	29	17	26	23	21	18	13
W01000013 Cwm Cadnant	23	17	24	14	28	19	24	26	24	25	34	28	18	23	24	24	28	27	25
W01000014 Cyngar	25	25	26	29	27	30	33	31	29	29	29	22	26	28	14	16	28	19	22
W01000015 Gwyngyll	8	9	10	9	10	12	12	17	15	15	18	12	17	32	19	10	15	14	19
W01000016 Holyhead Town	17	15	22	13	24	16	12	15	10	21	22	12	21	12	18	17	17	13	17
W01000017 Kingsland	8	10	21	20	22	21	23	29	28	30	31	25	26	29	27	16	15	20	16
W01000018 Llanbadrig	12	6	11	10	14	12	14	13	15	5	18	16	16	15	11	13	11	15	10
W01000019 Llanbedrgoch	6	5	9	16	10	4	1	5	2	3	9	12	9	8	10	10	10	10	11
W01000020 Llanddyfnan	15	8	11	15	5	7	12	13	14	13	12	10	19	10	13	13	11	15	14
W01000021 Llanellian	12	21	23	15	29	23	26	25	29	29	16	19	16	20	11	15	11	15	15
W01000022 Llanfaethlu	8	6	12	8	9	15	9	22	9	20	14	20	22	18	20	16	16	19	17
W01000023 Llanfair-yn-Neubwll 1	9	25	18	28	27	19	27	24	27	21	15	13	19	14	20	10	13	14	21
W01000024 Llanfair-yn-Neubwll 2	18	22	28	21	32	17	25	28	15	22	31	22	25	18	17	20	14	8	5
W01000025 Llanfihangel Ysgeifiog	23	19	19	15	20	27	27	30	29	18	17	33	27	18	22	30	32	25	27
W01000026 Llangoed	7	4	8	7	8	4	10	6	13	13	15	10	13	11	14	8	11	8	6
W01000027 Llanidan	20	10	18	20	23	12	20	25	25	26	28	26	24	28	24	21	17	16	12
LSOA Code & Name	0-12m	1 year	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years	10 years	11 years	12 years	13 years	14 years	15 years	16 years	17 years	18 years
W01000028 Llannerch-y-medd	24	20	25	25	25	28	31	30	32	32	37	27	33	33	17	29	15	22	23

W01000029 London Road	12	21	16	19	18	26	16	28	32	27	14	36	26	18	34	16	22	18	13
W01000030 Maeshyfryd	34	22	30	27	30	29	31	29	32	38	35	40	28	27	35	18	27	20	23
W01000031 Mechell	4	16	6	15	15	12	16	15	14	18	13	9	22	12	13	18	13	14	20
W01000032 Moelfre	4	8	2	6	6	9	9	14	7	9	14	9	15	5	12	1	6	2	4
W01000033 Morawelon	21	15	25	22	25	22	17	30	22	21	25	32	25	20	19	18	22	21	22
W01000034 Parc a'r Mynydd	11	11	11	16	18	13	13	28	24	16	10	23	19	15	17	15	16	11	12
W01000035 Pentraeth	17	16	18	23	22	19	24	24	21	29	19	24	22	23	23	14	20	16	14
W01000036 Porthyfelin 1	12	11	16	20	17	8	15	14	12	8	14	8	11	13	11	14	9	16	11
W01000037 Porthyfelin 2	6	11	7	7	14	6	8	11	9	14	18	13	17	17	23	14	24	12	13
W01000038 Rhosyr	16	15	16	18	19	26	19	19	25	25	32	21	26	10	26	20	20	22	18
W01000039 Trearddur 1	5	8	8	6	5	2	5	5	7	5	6	11	7	6	11	8	13	11	15
W01000040 Trearddur 2	3	5	8	5	3	7	6	8	8	5	8	9	13	12	9	8	3	8	8
W01000041 Tudur	22	31	27	32	30	26	30	23	40	26	26	25	27	32	27	24	24	30	23
W01000042 Tysilio	20	21	27	25	23	19	25	27	21	21	39	21	21	32	20	17	29	23	20
W01000043 Valley 1	8	11	14	16	12	14	15	19	11	18	10	18	16	9	17	7	16	13	11
W01000044 Valley 2	7	5	7	5	5	3	8	11	10	15	7	5	8	9	8	12	14	6	8

Table 33 indicates that the three LSOAs which have the **highest population levels of children aged 0-4 years** are:

1. Maeshyfryd
2. Tudur
3. Cyngar

The three LSOAs which have the **highest population levels of children aged 5-7 years** are:

1. Cyngar
2. Llannerch-y-medd
3. Maeshyfryd

The three LSOAs which have the **highest population levels of children aged 8-11 years** are:

1. Maeshyfryd
2. Amlwch Port
3. Llannerch-y-medd

Finally, the three LSOAs which have the **highest population levels of children aged 12-14 years** are:

1. Llannerch-y-medd
2. Amlwch Port
3. Tudur

DRAFT

- 11.2 Additionally Table 34 below indicates, from a Flying Start programme perspective, that the LSOAs accounting for the highest number of resident 2-3 year olds is Amlwch Port LSOA, followed in frequency by the Tudur LSOA.

Table 34 - Population of 2-3 year olds in Anglesey's LSOAs

Source: 2020 ONS

LSOA	Population of 2 year olds	Population of 3 years olds	Total
W01000001 Aberffraw & Rhosneigr 1	11	10	21
W01000002 Aberffraw & Rhosneigr 2	9	11	20
W01000003 Amlwch Port	28	32	60
W01000004 Amlwch Rural	13	10	23
W01000005 Beaumaris	12	20	32
W01000006 Bodffordd	10	20	30
W01000007 Bodorgan	11	14	25
W01000008 Braint	7	8	15
W01000009 Bryngwran	26	21	47
W01000010 Brynteg	12	18	30
W01000011 Cadnant	6	9	15
W01000012 Cefni	18	19	37
W01000013 Cwm Cadnant	24	14	38
W01000014 Cyngar	26	29	55
W01000015 Gwyngyll	10	9	19
W01000016 Holyhead Town	22	13	35
W01000017 Kingsland	21	20	41
W01000018 Llanbadrig	11	10	21
W01000019 Llanbedrgoch	9	16	25
W01000020 Llanddyfnan	11	15	26
W01000021 Llaneilian	23	15	38

LSOA	Population of 2 year olds	Population of 3 years olds	Total
W01000022 Llanfaethlu	12	8	20
W01000023 Llanfair-yn-Neubwll 1	18	28	46
W01000024 Llanfair-yn-Neubwll 2	28	21	49
W01000025 Llanfihangel Ysgeifiog	19	15	34
W01000026 Llangoed	8	7	15
W01000027 Llanidan	18	20	38
W01000028 Llannerch-y-medd	25	25	50
W01000029 London Road	16	19	35
W01000030 Maeshyfryd	30	27	57
W01000031 Mechell	6	15	21
W01000032 Moelfre	2	6	8
W01000033 Morawelon	25	22	47
W01000034 Parc a'r Mynydd	11	16	27
W01000035 Pentraeth	18	23	41
W01000036 Porthyfelin 1	16	20	36
W01000037 Porthyfelin 2	7	7	14
W01000038 Rhosyr	16	18	34
W01000039 Trearddur 1	8	6	14
W01000040 Trearddur 2	8	5	13
W01000041 Tudur	27	32	59
W01000042 Tysilio	27	25	52
W01000043 Valley 1	14	16	30
W01000044 Valley 2	7	5	12

11.2 **Population projections published by the Welsh Government in 2018¹³ reported that the population of the Isle of Anglesey is forecast to insert during the period 2018-2028.**

The 2018 ONS Local Authority Population Estimates indicated that Anglesey had a population of 69,800 (34,400 males and 35,400 females) at that time. Although the Island's population has grown by some 3.1% since the 2001 Census, **Welsh Government population projections anticipate that, between 2022-2039, an overall net decrease of almost 2,000 people or 2.6% of the island's population will occur.**

The Welsh Government 2018 document: *Local authority population projections for Wales*, also forecast a population decrease: in this case a decrease of 0.4% between the period 2018-2043.

11.3 In terms of birth rates for the locality , Table 35 details metrics in each of the localities wards for the year 2019 – i.e., children who will now be of (or approaching) Flying Start programme age.

Table 35 – Year 2019 birth rates for the Anglesey locality

Source: ONS 2020

Ward name	2019 Birth rate/number
Aethwy	40
Bro Aberffraw	26
Bro Rhosyr	43
Caergybi	81
Canolbarth Môn	103
Llifôn	45
Lligwy	39
Seiriol	35
Talybolion	39
Twrcelyn	57
Ynys Gybi	49

¹³ <https://gov.wales/sites/default/files/statistics-and-research/2020-08/subnational-population-projections-2018-based-280.pdf>

Table 35 indicates that the ward with the highest number of new births pre-pandemic was Canolbarth Môn, followed in frequency by the ward of Caergybi.

11.4 Table 36 shows inflow migration and outflow migration aligned to the locality for the period 2018-2020. The Table indicates that inflow, in particular international inflow was higher than outflow of people. Previous years had shown an identical incidence and the proportion of inflow in comparison to outflow had been increasing year-to-year.

Source: ONS 2019

		Mid 2018 – Mid 2020				
Anglesey	Mid-2019	Pop Estimate =	Long-term International Migration		Internal Migration (within UK)	
	70,043		Inflow	Outflow	Inflow	Outflow
	Mid-2020	Pop Estimate =	Long-term International Migration		Internal Migration (within UK)	
	70,440		Inflow	Outflow	Inflow	Outflow
			116	53	2,517	2,293
			102	42	2,350	1,800

11.5 In terms of ethnicity, Table 37 indicates that number of children who were resident in the locality in 2019 from specific backgrounds.

Table 37 - number of children and young people resident in the Anglesey locality in 2019 from specific ethnic backgrounds

Source: ONS 2019

Age	White	White British	Mixed	Asian	Black	Other
0	573	562	12	3	1	5
1	658	645	13	3	1	5
2	689	675	14	4	1	6
3	718	703	14	4	1	5
4	669	656	13	3	1	6
5	757	741	15	4	1	6
6	806	790	16	4	1	6
7	802	785	16	4	1	6
8	794	777	16	4	1	3
Age	White	White British	Mixed	Asian	Black	Other

9	777	765	11	10	0	2
10	783	777	10	11	1	4
11	790	782	14	5	0	4
12	728	716	8	11	1	4
13	745	738	10	2	0	3
14	662	653	7	4	1	5

In terms of ethnicity of young people resident in the Isle of Anglesey, Table 37 indicates that number of children who were resident in the locality in 2019 from specific backgrounds who were aged up to 14 years. It indicates that the majority of children and young people resident on the island are White British, however there is a notable population of children and young people representing other ethnicities and backgrounds, and this is likely to increase during the period 2022-2025, including aligned to the contemporary refugee crisis.

- 11.6 The Isle of Anglesey has a relatively high number of Welsh speakers, with approximately 63% of residents being able to speak Welsh – the second highest percentage, for a Local Authority area, in Wales. In terms of the incidence of Welsh speakers in the Isle of Anglesey locality the repository StatsWales indicates that in 2019, almost 2:3 of the Isle of Anglesey population were able to speak Welsh – [Table 38](#):

Source: Stats Wales:

Area	All aged 3 years or over	Yes, can speak Welsh	No, cannot speak Welsh	Percentage of people who say that they can speak Welsh
Wales	3,022,900	892,200	2,128,700	29.5%
Anglesey	67,500	42,600	24,700	63.3%

A report published by Menter Iaith Môn in spring 2021, indicated that 78% of Welsh-born ‘islanders’ can speak the language, with another 11% able to understand it. Welsh-born speakers varied from 58.8% around Holyhead to 90.4% in central Anglesey. However, outward migration of younger Welsh speakers coupled with the inward migration of non-Welsh speaking older people is said to be ‘Anglicising’ areas and affecting its sustainability. The report outlined how Anglesey school pupils are being taught mostly

through the medium of Welsh at school (86.8%), but only 49.1% of children were speaking Cymraeg regularly at home. The report concluded that *“looking at the trends of the last 50 years, an increase in the population is leading to a decrease in the percentages of Welsh speakers”*.

11.7 Table 39 indicates the incidence of children with ALN being resident on the Isle of Anglesey.

Table 39 - Incidence of children with ALN on the Isle of Anglesey in 2020-2021 (before the ALN Code came into being in September 2021)

Source: StatsWales

Location	All Special Educational Needs				All Special Educational Needs/ALN
	Statemented	Total: Special Educational Needs but no Statement of SEN		Total: Special Educational Needs but no Statement of SEN	
		School Action	School Action Plus		
Wales	14,082	46,790	31,816	78,606	92,688
Anglesey	300	1,322	659	1,981	2,281

Ynys Mon Specialist Children’s Service is an integrated team with members from Health and Social Services being co-located in local authority premises. The team works with ALN children and young people between the ages 0-17 years and their families who have multiple complex needs that cannot be met by universal or targeted services. The range of needs include children and young people who have a learning disability, physical impairments and lifelong chronic illness/medical conditions. The team is made up of Social Workers, Community Paediatric Learning Disability Nurses, Nursing Assistants, Paediatric Learning Disability Clinical Psychology, Occupational Therapist, Transition Co-ordinator, Inclusion and Wellbeing Officer, Social Services Support Worker Manager and Team of Support Workers, Service Administrator.

In September 2021, the service was working with 194 children and young people of 0-18 years. Of these, 116 had a learning disability including those with ASD, ADHD. Other children and young people open to the service include 32 with physical impairments and 22 with chronic illness and complex health needs.

11.8 Table 40 shows the incidence of Looked After Children resident on the Isle of Anglesey in 2021.

Table 40 - Incidence of LACs on the Isle of Anglesey in 2021

Source: StatsWales

Area	Under 1 year	1-4 years	5-9 years	10-15 years	16-17 years	18 years and over
Anglesey number	0	35	40	55	25	0

11.9 The 2016-2017 report: Anglesey & Gwynedd Gypsy and Travellers Accommodation Needs Assessment reported how:

- In the 2011 census there were 65 people on Anglesey who declared their ethnic origin to be Gypsy or Irish Traveller. This total included all age groups and therefore included children
- When this information was further broken down across the 40 ward areas of Anglesey, the 65 were found to be dispersed widely across Anglesey with only one ward area where there are more than 10 people who had identified as Gypsies or Irish Traveller in the census.

11.10 In terms of the 2019 Welsh Index for Multiple Deprivation (WIMD)¹⁴, the Isle of Anglesey was one of 12 Local Authorities with no small areas/LSOAs of deep-rooted deprivation (Isle of Anglesey, Gwynedd, Conwy, Flintshire, Powys, Ceredigion, Pembrokeshire, Carmarthenshire, Vale of Glamorgan, Torfaen, Newport, and Monmouthshire). This does not mean that there aren't currently any very deprived areas in these Local Authorities.

In terms of the indicator of physical environment, the Isle of Anglesey had no areas in the most deprived 10%.
 In terms of the indicator of education, the Isle of Anglesey had no areas in the most deprived 10%.

The LSOA within the Isle of Anglesey which evidently accounts for the highest levels of relative disadvantage is the Holyhead Town locality – see Table 41 overleaf.

Table 41 - Rankings of Anglesey LSOA areas with regard to overall indicators of deprivation (out of 1,909 Welsh LSOAs)

¹⁴ <https://gov.wales/sites/default/files/statistics-and-research/2019-11/welsh-index-multiple-deprivation-2019-results-report-024.pdf>

Source: Welsh Index of Multiple Deprivation (WIMD) 2019

LSOA code	LSOA name (Eng)	WIMD 2019 ranking (out of 1,909)
W01000001	Aberffraw & Rhosneigr 1	885
W01000002	Aberffraw & Rhosneigr 2	1,324
W01000003	Amlwch Port	550
W01000004	Amlwch Rural	1,100
W01000005	Beaumaris	1,065
W01000006	Bodffordd	1,116
W01000007	Bodorgan	1,036
W01000008	Braint	1,820
W01000009	Bryngwran	819
W01000010	Brynteg	1,624
W01000011	Cadnant (Isle of Anglesey)	1,377
W01000012	Cefni	1,494
W01000013	Cwm Cadnant	1,777
W01000014	Cyngar	1,194
W01000015	Gwyngyll	1,704
W01000016	Holyhead Town	168
W01000017	Kingsland	486
W01000018	Llanbadrig	1,145
W01000019	Llanbedrgoch	1,233
W01000020	Llanddyfnan	1,424
W01000021	Llaneilian	1,044
W01000022	Llanfaethlu	857
W01000023	Llanfair-yn-Neubwll 1	985
LSOA code	LSOA name (Eng)	WIMD 2019 ranking (out of 1,909)

W01000024	Llanfair-yn-Neubwll 2	1,050
W01000025	Llanfihangel Ysgeifiog	1,300
W01000026	Llangoed	946
W01000027	Llanidan	954
W01000028	Llannerch-y-medd	727
W01000029	London Road	366
W01000030	Maeshyfryd	353
W01000031	Mechell	864
W01000032	Moelfre	1,053
W01000033	Morawelon	224
W01000034	Parc a'r Mynydd	1,196
W01000035	Pentraeth	1,087
W01000036	Porthyfelin 1	316
W01000037	Porthyfelin 2	974
W01000038	Rhosyr	764
W01000039	Trearddur 1	1,409
W01000040	Trearddur 2	1,325
W01000041	Tudur	308
W01000042	Tysilio	1,442
W01000043	Valley 1	915
W01000044	Valley 2	1,716

11.11 In terms of employment and unemployment rates across the Anglesey locality, in September 2021, 73.6% of the adult population were classified as economically active and in employment. This was 2.8% lower than the average across all of Wales. Data published by NOMIS, in autumn 2021 also indicated that the five types of occupation which adults were most frequently employed in were (in order of frequency):

1. Accommodation and Food Services (3,500 employees)
2. Wholesale and Retail (3,000 employees)
3. Human Health And Social Work Activities (2,500 employees)
4. Manufacturing sector (2,000 employees)
5. Education (1,500 employees)

Throughout Wales there has been a growing trend with regard to the incidence of shift working. For example the Wales TUC Cymru published a report in late 2019 that highlighted how: ¹⁵

- There were 17,000 more night workers in Wales than there were in 2014
- There were 165,000 people regularly working nights in Wales - 13% of the workforce
- In the UK, care workers (432,000) accounted for the majority of night workers, followed by nurses and midwives (232,000)
- The next most common profession for night workers was road transport drivers (208,000)
- Wales has the third highest share of workers doing night work, compared with the other eleven UK regions.

11.12 Data published by NOMIS in autumn 2021, indicates that the average weekly wage for a full-time employee who is resident in the locality was £549.50, which (is lower than and) can be contrasted with the average for Wales which £562.80 per week.

¹⁵ <https://www.tuc.org.uk/news/17000-more-night-workers-wales-over-last-five-years-tuc-analysis-shows>

Table 42 - Annual household incomes of families in specific Isle of Anglesey localities

Source: Welsh Index of Multiple Deprivation (WIMD) 2019

Location of Anglesey	Annual Household Income [£]
Holyhead	25,700
Amlwch & Llannerch-y-medd	29,600
Llangefni	33,200
Bodedern & Rhosneigr	35,200
Rhos-y-bol, Marian-glas & Moelfre	35,900
Newborough	36,000
Llain-goch & Valley	40,200
Beaumaris & Benllech	41,300
Llanfair Pwllgwyngyll	45,500

- 11.13 Additionally, the 2018 Welsh Government Statistical Bulletin reported that the locality accounted for the 11th highest percentage (compared with other local authorities) of children that were resident in workless households – at 17.8% of all households.
- 11.14 The 2018 Welsh Government Statistical Bulletin reported that 8.3% of households in the Anglesey locality (1,800) were lone parent families. This was 0.4% above the average for Wales as a whole – and the 8th highest in comparison to all Welsh local authorities.
- 11.15 In 2022, the Isle of Anglesey County Council outlined a five-year strategy to meet a local housing ‘challenge’. The strategy outlined that the Local Authority is targeting an increase in its council housing stock of 176 homes over the next three years, up to 2025, and - working with social landlords the it was also planning to build an additional 144 houses.

The Housing Strategy 2022-2027 also outlines an ambition for 321 new homes to be provided by partner Registered Social Landlords (including social housing, intermediate rent, home buy, rent to own and extra care) and for 439 number of empty homes bought back into use.

Additionally localised housing developments have continued to be approved in 2022, which will be occupied, in part, by families moving *onto* the island – including at sites such as the Llangefni's Coleg Menai campus and at the village of Valley (where, for example, 50 new homes are planned).

DRAFT

12.1 The live Anglesey Local Wellbeing Plan for the can be viewed at:
<https://www.llesiantgwyneddaron.org/Uploads/Pages/Documents/3-5-3-94-1-Gwynedd-and-Anglesey-Well-being-plan.pdf> .

The Assessment of Local Well-being for Gwynedd and Anglesey was published in May 2017. Having considered the data and the views of local people, the Board concluded that the key messages of the assessment were as follows:

- 1. The need to maintain a healthy community spirit**
2. The importance of protecting the natural environment
- 3. Understanding the effect of demographic changes**
- 4. Protecting and promoting the Welsh language**
5. Promoting the use of natural resources to improve health and well-being in the long-term
6. Improving transport links to enable access to services and facilities
7. The need for good quality jobs and affordable homes for local people
- 8. The effect of poverty on well-being**
- 9. Ensuring an opportunity for every child to succeed**

The plan outlines how *“a lack of educational attainment can have an impact on the well-being of individuals throughout their lives, so we need to ensure that every pupil has an opportunity to succeed”* and that *“the Plan will give priority to supporting families to try to ensure that every child has the best start in life. We will also work with key partners to deliver the best possible results for children and young people”*.

Childcare and early years planners within the local authority and local partners therefore remain aware that the 2022 Childcare Sufficiency Assessment represents another strategy - particularly through its gaps analysis – of helping to encourage healthy communities on the Isle of Anglesey.

Additionally, it can be noted that the 2020-2021 Gwynedd and Anglesey Public Services Board report described how a children’s sub-group was exploring the theme of *early support for children and families in local communities* and that it was (and continues in 2022, to be) working with the third sector with the aim of helping families to reintegrate into their communities after lockdown and to provide early help and support to those families.

13 Gaps Analysis

The following, pivotal, section outlines gaps in childcare provision which the 2022 Isle of Anglesey Childcare Sufficiency Assessment has evidenced and identified. Each of the gaps that have been included below align to a particular classification – i.e. one of the following:

A Gap aligned to:

- **Times** at which childcare is available, including the need for flexible childcare that caters for irregular patterns of usage across the day, the week and the year
 - the **Types** of childcare available
 - the **Age** of children for whom childcare is available
 - the **Affordability** of childcare
 - the specific needs for children with **ALN**
 - the specific needs for **Welsh Medium** childcare provision
 - **Geographical location** of childcare in relation to population, ward and school catchment
-

Times at which childcare is available

- 1 19% of the parents/carers who responded to the October 2021 Welsh Government parental survey about whether childcare acted as a barrier to them taking up employment or training denoted: *Tend to Agree*. Additionally, 26% of the responding parents/carers also stated: *Strongly Agree*.

This indicates that 45% of responding parents/carers believed that – to an extent – childcare had, at some recent point, been acting as a barrier to them accessing employment or training.

Supplementing this feedback, 9% of responding parents/carers stated that in the last year, issues surrounding childcare had affected themselves being able to ‘take on new a job’ - and 7% of parents/carers stated that in the last year, issues surrounding childcare had affected themselves or a partner being able to ‘access training’.

Therefore, it can be concluded that to an extent, on the Island, suitable childcare continues to represent a challenge for certain parents when it comes to supporting their employability.

- 2 A repeated trend experienced in the past two years, reported by setting-based providers and childminders was that certain parents were requesting more flexibility, including as an outcome of an increased incidence of working from home.

A second repeated (and associated) trend was that there had been an increase in the numbers of parents requesting extended/longer opening hours. However, in response to the autumn 2021 survey, only 19% of responding setting-based childcare providers stated that they had plans to extend their opening hours. It is evident that an evident (though not significant) gap exists in terms of certain working parents ideally requiring earlier opening hours and later closing hours, and being unable to locate and access such provision.

Types of childcare that are available

- 3 Related to 2. above, only 7.5% of responding setting-based childcare providers stated that they had plans in place over the next 18 months to 'better meet the needs of shift workers/those who work outside typical office hours'. However, there was a notable quantity of qualitative feedback as an outcome of the Welsh Government parental survey that (possibly as an outcome of COVID-19) demonstrated that the incidence of a requirement for shift working and working outside of traditional 8am-6pm hours was increasing.

It is important to note that the childminding sector (as well as the wider registered childcare sector) will quite possibly be essential to address this need, given its traditional ability to offer more flexibility aligned to opening times - and that in 2022, there are 45 childminders compared to 50 in 2019 (as reported in the 2019 CSA update).

- 4 1 : 4 of all responding settings/groups stated that they had seen members of their workforce exit because of the pandemic, which was representative of a theme that is becoming evident throughout Wales: that retention and recruitment is proving to be an increasing problem issue. Indeed at the other end of the 'pipeline' it can be observed that as an outcome of the autumn 2021 consultation with early years childcare providers, the majority -60% stated -that they had no plans, in late 2021 to recruit any apprentices.

(It should also be noted that, with regard to issues effecting the island's childcare workforce, approximately 40% of all representatives of childcare providers who were consulted in autumn 2021 stated that either themselves (including as a childminder) or members of their team/workforce/an assistant had experienced mental health difficulties and problems during the height of the COVID-19 pandemic or may be continuing to do so. This was commonly associated with anxiety about the ongoing sustainability of their business/livelihood).

Age of children for whom childcare is available

- 5 In early 2022, the Welsh Government announced plans to enhance the ability of parents and families who have two-year olds to access universal funded childcare provision (i.e., effectively) to extend the Flying Start programme). In order to meet a potential forthcoming demand for such provision, the Isle of Anglesey County Council should be mindful that: 1. 10% of early years childcare providers/settings said they had a waiting list in autumn 2021 – most frequently for 2 year old places; 2. a repeated trend stated by relevant childcare providers was an increase in demand for places for 2 year olds.

Therefore, there *may* be a 2 year old places sufficiency gap that emerges as the (admittedly, phased) universal 2 year olds places programme begins to be rolled out in September 2022.

It can also be similarly conjectured that there may also be an increased in demand for 30 hours places for 3 and 4 year olds as an outcome of the extension to the 30 hours childcare offer.

- 6 Almost 50% of parents who responded to the Welsh Government parental survey stated that they intended to access *more* childcare in the forthcoming years – and this was most frequently a type of out of school childcare. Indeed the two types of childcare that were highlighted with the highest frequency by relevant parents were:
- After School Club – 20% of relevant parents
 - Before School/Breakfast Club – 17% of relevant parents

However, a number of parents that responded to the October 2021 Welsh Government parental survey consistently and repeatedly stated how they were experiencing challenges and difficulties accessing out of school childcare-themed wraparound care, that *best suited their working patterns*. Therefore, this suggests a sufficiency gap could be evident or may grow, particularly as the working population of Anglesey continues to return to a physical workplace/office and continues to require suitable out of school childcare opening times (including through breakfast clubs) and closing times (principally through after school clubs).

Specific needs for children with ALN

- 7 5.5% of parents/carers who responded to the October 2021 parental demand survey outlined that they had at least one child with diagnosed and/or undiagnosed additional learning needs. Qualitative feedback from the survey incorporated a repeated incidence of certain parents outlining their challenges to identify and/or secure suitable and affordable formal childcare. For example, feedback included:

“My daughter is ‘disabled’ and there is nowhere that meets her requirements. She cannot be left on her own so I have had to give up work to be there for her”.

[In my experience] *It really hard to find childcare for secondary aged children with SEN”.*

Additionally, in response to the autumn 2021 consultation with childcare providers, 68% of early years childcare providers/settings and almost 48% registered childminders stated that COVID-19 had had an impact on the early years development of children attending their provision, with the such respondents frequently stating that children’s speech and language had been negatively affected and/or that they had seen issues around some children not socialising with other children/had seen an increased incidence of separation anxiety.

Although 50% of early years childcare providers/settings stated that they had plans in place to further enhance provision for children with additional learning needs, only 15% of childminders state that they had such plans.

It can therefore be considered that as the incidence of ALN children continues to grow, there needs to be a corresponding frequency of childcare providers having the ability to provide suitable and affordable places for these children, to mitigate a potential ALN-provision sufficiency gap.

Welsh Medium childcare provision

- 8 Encouragingly, 20% of all childcare providers stated in autumn 2021 that they had either definite plans in place to create more Welsh-speaking/medium places or that this is something that they would maybe consider, however the local authority needs to continue to monitor the incidence of accessibility to Welsh-medium childcare places aligned to the ambitions of specific families. The local authority should also be mindful of the fact that when parents/carers gave qualitative feedback about the theme of Welsh medium-childcare, this included:

“I have not been able to find a Welsh speaking childminder” – and similarly:

“There are not many Welsh childminders around Llanerchymedd” – and again similarly:

*“**[In my experience]** there is a lack of Welsh speaking childminders; also the after school club finishes too early at 5.00pm. I need a later pick up”.*

“The Welsh language provision is not good in our local area, which is important for us as a Welsh speaking family”.

“There is not a lot of Welsh providers. My area didn’t have a lot of options”.

“It would be good to see more information and support for non-Welsh speaking parents to access Welsh language childcare for nursery age children. We use a Cylch Meithrin and a day nursery but it was tricky to work out which sessions would be most beneficial and arrange a day nursery around that. More provision of bilingual or Welsh speaking day nurseries would be helpful, or increased financial support for Cylch's to open longer hours and during the school holidays”.

Affordability of childcare

- 9 The most recurrent barrier to accessing formal childcare that was highlighted by parents/carers who responded to the Welsh Government parental survey was that the cost of childcare had prevented them from accessing a formal provision. The Family Information Service, therefore, needs to **continue to** communicate and disseminate information about existing funded childcare initiatives and forthcoming *new initiatives* such as: (a) the extension of the Childcare Offer to parents in education and training and parents who are on adoption leave and: (b) the offer of free childcare to all two-year-olds within the next three years, given how logical it is that these two initiatives will benefit specific families.

The local authority should also be mindful of the fact that 43% of early years childcare providers/settings that responded to the autumn 2021 CSA survey stated that they did not take any actions to market the existence of Tax Free Childcare.

Location of childcare

- 10 The Isle of Anglesey Housing Strategy 2022-2027 outlines an ambition for 321 new homes to be provided by partner Registered Social Landlords and for 439 number of empty homes bought back into use.

Additionally localised housing developments have continued to be approved in 2022, which will be occupied, in part, by families moving *onto* the island – including at sites such as the Llangefni's Coleg Menai campus and at the village of Valley (where, for example, 50 new homes are planned).

In this context, it can also be noted that (only) 15% of early years childcare providers/settings stated that they had plans to increase the number of places they offered, over the next two years. Collectively this was an ambitious 107 places being considered by these relevant childcare providers, although 70 of these potential places were attributable to a response from one provider situated in the Canolbarth Môn ward.

- 14 Summary of Unmet Need

The 2022 Childcare Sufficiency Assessment for the Isle of Anglesey does not suggest that there is a particular ward or LSOA or locality where, at the present time, there is a stark or evident lack of childcare places for parents and carers who require them – and this is in large part undoubtedly attributable to the impressive resilience that the island’s early years and childcare sector showed during the challenges that the pandemic brought, especially during the period 2020-2021.

However, the previous Gaps Analysis section has demonstrated that there quite feasibly could be a number of issues that will challenge sufficiency of childcare provision on the island over the forthcoming years – not least what is an evident problem: the ability of setting-based childcare providers to recruit and/or retain well qualified professionals. As has been stated in this CSA, this is an issue which is pan-Wales and not isolated to the Isle of Anglesey or North Wales, however it can be considered a particular concern for childcare planners on the island due to the fact that it has a degree of physical isolation (and rurality), where the mobility of a localised workforce is not as viable as it may be in the other Welsh local authority areas.

Aligned to this recruitment issue, is an associated theme which this CSA has identified and which can, to an extent, be considered an unmet need: this is that certain parents have reported that they are experiencing difficulties with accessing suitable Welsh-medium childcare. These parents evidently believe that the level of proficiency in the Welsh language, with regard to staff at settings, and childminders, could be better and that a perception of some childcare providers that they are Welsh-medium providers, does not necessarily match a reality. Given that the Isle of Anglesey accounts for a relatively high percentage of (North) Welsh speakers, this can be considered a shortfall which childcare and early years professionals need to retain an awareness of - and prioritise a focus on enhancing.

Some of these parents who have raised this issue, as part of the October 2021 Welsh government parental demand survey, were evidently working parents – or were parents that were seeking to access employment and/or training. Almost 50% of all respondents to that survey stated that a lack of suitable childcare had affected their ability to attain employment or training - or to continue in such a role. This is a notable percentage and although affordability certainly plays a part, other factors – such as a lack of suitable Welsh medium childcare and an absence of suitable wraparound start and finish times – are also affecting employability on the island. It can be recalled that qualitative responses to the survey also indicated that some working parents – who may have been working from home during 2020 and 2021 and who were gradually returning to their office/physical location of work – were experiencing difficulties whereby a breakfast club was not opening at a time that best suited them – i.e. it was not opening early enough, or an after school club (registered and/or unregistered) was not finishing at a time that best suited them – i.e. – it was closing/concluding too early. This is an issue which the local authority will continue to actively monitor, including via its first CSA update in 2023.

Another related theme, which could be maybe considered as the beginnings of an unmet need, was that a number of parents fed back as part of that survey how they were working shift hours, outside of a traditional 8.00am-6.00pm day, and that the childcare support that was evidently available to them was not accessible at relevant times. There is a recognition that increasing an accessibility to formal childcare,

outside of the 8am-6pm weekday core hours, is in reality going to be a challenging course of action – and if this is to be realised the island’s childminding sector will play a vital role. However, there has been 11% decrease in the number of registered childminders operating on the island during the period 2019-2022 and that is a trend which the local authority has pro-active plans to reverse, including through structured outreach and workshop sessions, commencing in summer 2022.

Reverting back to the pan-Wales recruitment and retention challenges, the local authority is enthused about the extension to the Childcare Offer and the forthcoming expansion of the Flying Start programme, as it (on a phased basis) brings about universal childcare for two-year olds.

However, in order, to ensure that the potential increased demand for early years childcare places that both extended programmes will instigate, the local authority recognises that a requisite workforce (size) will be necessary and therefore it plans to work in further and continued close partnership with the likes of Cwlwm Wales and Coleg Mena Llangefni to help ensure that young people resident on the island can feel that a career in childcare represents a profession and represents a way of supporting their community.

A final consideration continues to focus on the theme of affordability. Once again, the most frequent barrier that was highlighted by parents who responded to the October 2021 Welsh government parental demand survey was that of affordability and struggling to be able to pay childcare fees. The fact that funded childcare provision continues to be accessible and is being expanded is, of course, welcome – however the present cost of living crisis may exacerbate the ability of families to consider accessing formal childcare, and this leads back to concerns with the sustainability of the sector.

15.1 The 2021 Welsh Government parental survey invited its target audience to give feedback about any barriers that they had encountered with regard to them accessing childcare *of their choice*. The collective feedback of the parents/carers is summarised in Table 43 below.

Table 43 - frequency of reasons stated as to why a parent/carer was not accessing/receiving support with childcare in autumn 2021

Reasons/Barriers	Percentage of relevant responding parents/carers
Child is on a waiting list for a provider & we are waiting for a place to become available	<0.5%
There is no childcare with sufficient quality	<0.5%
There is no suitable Welsh Language provision	1%
No suitable provision in our language, which is neither Welsh nor English	<0.5%
The childcare available is not flexible enough for my needs	3%
The cost of childcare is too expensive	7.5%
Childcare times are unsuitable	3%
There is no childcare available that is suitable for my child's age	2%
There is a problem with transport	1%
There is no childcare where I need it to be	1%
There is no childcare that can cater for my child's specific needs	0.5%
I only use childcare on an ad hoc basis and it is impossible to plan	2%
Other	1.5%

A broad analysis of Table 43 was outlined in Section 6 of this CSA. It indicated that when a barrier was highlighted it was only ever, at most, stated by approximately 1:12 parents or carers – which concerned the fact that in the opinion of these parents, the cost of childcare is (or had been) too expensive. Further scrutiny of the quantitative data generated by the Welsh Government parental survey indicates that:

The three most frequent barriers that were reported by working parents were (in order of frequency):

1. The cost of childcare is too expensive (stated by 8% relevant parents)

2. Childcare times are unsuitable (4%)
3. The childcare available is not flexible enough to meet my needs (3%)

The three most frequent barriers that were reported by parents evidently seeking work or training were:

1. Childcare times are unsuitable (16%)
2. There is no childcare that can cater for my child's specific needs (16% of relevant parents)
3. The cost of childcare is too expensive (stated by 8% relevant parents)

Finally, the three most frequent barriers that were reported by carers of a child with additional learning needs were:

1. The cost of childcare is too expensive (stated by 22% relevant parents)
2. There is no childcare that can cater for my child's specific needs (10% of relevant parents)
3. There have been problems with transport (stated by 10% relevant parents)

15.2 The Welsh Government parental survey also invited parents and carers to provide *qualitative* feedback about their childcare experiences, satisfaction levels and any barriers that they had experienced, or that they continued to experience.

In terms of the theme of barriers to accessing formal childcare in October 2021 - the most frequent type of feedback was (words to the effect)

“Local out of school childcare options do not work for me”.

Specific feedback on this theme - including the opening times of this type of provision - in October 2021, *included:*

[In my experience] *There is no childcare facilities for secondary age children. All the council run clubs in holidays are geared up to children in primary school and are not suitable for full time workers or shift workers. A lot of the clubs are aimed at children of parents with benefits, some of whom don't need childcare for work. There should be childcare and clubs available for secondary age children especially during school holidays where parents find it difficult to look after their children. Parents working full-time/front-line only get a certain amount of hours/days per year annual leave which doesn't cover all the school holidays, even if both parents alternate taking time off. The summer holidays is especially demanding with secondary age children as there is no facilities at suitable times. I work 12 hour shifts 8.00am-8.00pm and nowhere caters for this kind of childcare for secondary age children. When they were in primary [school] I was able to find suitable childcare, but when one went up to secondary and the other was still in primary, they wasn't able to use the childcare, and I only had provision for the secondary age child”.*

[In my opinion] *There are no childcare/Kids Clubs for children ages 11 years+ on Anglesey/Gwynedd. If there are clubs, they run 10am-12pm or don't offer a full day. It's the same for under 11 year olds. The club times are not useful for working parents. I have to use a nursery that charges. £35 per day for each child. I have a daughter who is epileptic, so I am limited to where she can go... I am lucky that my husband is working from home. I don't know what would happen to my 11 year old and my 13 year old if he wasn't home. There are so many young kids that have been left on their own because there is nothing for them during school holidays”.*

“My school stopped having its after school club, so we now have to use the after school club at the nursery which is very good but more expensive than the school's one used to be. We have no option as we both work shifts. The nursery picks-up from the school and brings the children to their after school club” – and similarly:

“The school closed its after school club, and now we have to use the after school club at a nursery. It is a shame that it's not in the same complex as the school – as it is more expensive”.

“There is no space in after school club at my school”.

[In my experience] *all after school childcare 'facilities' finish at 6.00pm. I work until 6.00pm in Bangor which is half an hour away from home. I cannot use childcare facilities as they finish too early for me to be able to pick up my children in time, so I have to heavily rely on family and friends to help me".*

The second most frequent type of feedback was (words to the effect) *"there is a lack of Welsh-medium childcare options".* Specific feedback on this theme, in October 2021, *included:*

"I have not been able to find a Welsh speaking childminder" – and similarly:

"There are not many Welsh childminders around Llanerchymedd" – and again similarly:

[In my experience] *there is a lack of Welsh speaking childminders; also the after school club finishes too early at 5.00pm. I need a later pick up".*

"The Welsh language provision is not good in our local area, which is important for us as a Welsh speaking family".

"There is not a lot of Welsh providers. My area didn't have a lot of options".

"It would be good to see more information and support for non-Welsh speaking parents to access Welsh language childcare for nursery age children. We use a Cylch Meithrin and a day nursery but it was tricky to work out which sessions would be most beneficial and arrange a day nursery around that. More provision of bilingual or Welsh speaking day nurseries would be helpful, or increased financial support for Cylch's to open longer hours and during the school holidays".

The third most frequent type of feedback was (words to the effect) *"the cost of childcare is too expensive".*

Specific feedback on this theme, in October 2021, included:

“Finding good Welsh childcare was very ‘limited’ and we ended up at the most expensive establishment going!”

“Basically, childcare is too expensive”.

“I haven't looked into childcare as I can't afford it. I didn't know there was help”.

“The cost of childcare compared to how much I was earning when employed was ridiculous”.

“I have an ongoing issue. I am looking for work and trying to write job applications with a 2 year old at home. There is no childcare provision if you're looking for work and I've struggled with that. I don't have the money to pay for childcare but I need the childcare to spend time applying for jobs. It is a chicken and egg situation”.

“The facilities of some nurseries in the [unspecified] area are poor, especially considering the cost”.

“It is not cost effective for us to pay for more childcare... it's cheaper because of childcare, for one of us to go part-time”.

A fourth repeated type of feedback was (words to the effect) *“I have problems finding childcare due to my shift hours”.*

Specific feedback on this theme, in October 2021, included:

“When I am working shifts, childcare isn't open early enough, or late enough”.

“I work shifts, and childcare doesn't start early enough, and my partner works Monday to Friday... so when we both work during the day we have to rely on family, and this gets difficult...”.

“I have difficulty getting childcare for the shift hours I work, as I start early or finish late. I also have unpredictable finish times”.

“I have not returned to work as a GP since having children, as the hours provided by childcare ‘services’ in my area are too short. Everything finishes at 5.30pm”.

“Not everyone works a regular 9am-5pm job, or has family that could provide wrap around care”.

A fifth repeated type of feedback was (words to the effect) *“I have had issues with accessibility”.*

Specific feedback on this theme, in October 2021, *included:*

“I think that there are very few childminders on the island. There are some that are grouped in bigger villages or in towns which are far from me. There is none close to me, so my daughter has to be taken to a childminder and attend a school that is 25 minutes from where we live. In my experience - most are full

“There was not any childcare available when my son left Flying Start. There is not a nursery at my school and no alternative, so my son will be at home until he goes to school”.

“In my opinion, there is a lack of childcare providers. There are very few after school placements locally. I had to move my son’s school so he could access after school care”.

16 Workforce Development and Training

The following section outlines feedback that was received via the July 2021 SASS Self Assessment of Service Statement responses from childcare providers situated in the locality and the outcomes of the winter 2021 survey with the same stakeholders/providers.

It focuses on the: (a) locality's childcare and early years workforce and; (b) their perceived training needs, including those that align to the National Minimum Standards for Regulated Childcare (NMS) and which focus on themes including opportunities for play and learning, nurturing and well-being, behaviour, conduct and management of the service, equal opportunities and child protection.

16.1 As part of the autumn 2021 survey with early years childcare and out of school childcare settings, representatives were invited to feedback how many staff were currently employed?

- The average number of full-time currently employed by early years childcare settings was 4.
- The average number of full-time currently employed by out of school childcare settings was 3.
- The average number of part-time currently employed by early years childcare settings was 3.
- The average number of part-time currently employed by out of school childcare settings was 4.

Table 44 indicates the number of workforce members in the Anglesey locality that held particular qualifications in each of the three main sectors in summer 2021

Source: SASS July 2021

Type of Qualification	Total number holding the qualification in the Early Years Childcare sector	Total number holding the qualification in the Childminding sector	Total number holding the qualification in the Out of School Childcare sector
Children's, Care, Learning and Development qualification at level 2	60	2	2
Children's, Care, Learning and Development qualification at level 3	166	21	6
Children's, Care, Learning and Development qualification at level 5	70	3	1
Level 2 Award in Playwork Practice (L2APP)	0	1	0
Level 2 Diploma in Playwork	2	1	5
Level 2 Diploma Playwork; Principles into Practice (P3) - comprises award, certificate and diploma	0	1	0
Level 3 Award in Managing a Holiday Play Scheme	1	0	0
Level 3 Award in Transition to Playwork from Early Years	17	1	5
Level 3 Diploma Playwork	9	0	1
Level 5 Diploma in Playwork	2	1	0

16.2 The winter 2021 survey with setting-based childcare providers requested feedback on how COVID-19 had affected the recruitment and retention of staff/professionals including (as would be expected) with regard to their own setting.

25% of all early years childcare and out of school childcare providers outlined that they had seen a number of their staff decide to leave their setting in the past 12 months, **as a direct result of COVID-19.**

In total, across all relevant respondents, this totalled 29 members of staff/childcare professionals that had exited the profession evidently *due to COVID-19.*

Respondents feedback on the sectors that they had such 'lost staff' too included:

(Most frequently, words to the effect) *"To another childcare provider in the sector"*

"To the elderly adult care sector".

"They just decided to stop working for the time being".

"The member of staff in question left for an office job".

16.3 The autumn 2021 survey with early years childcare and out of school childcare settings/providers invited respondents to state how well aware and advanced they felt that their setting was in terms of the ALN transformation programme and (it helping with) creating a unified system for supporting learners from 0-25 years with additional learning needs?

- 8% of early years childcare providers stated: that they had made 0 progress in this area
- 33% of early years childcare providers stated: we have made excellent progress in this area
- 58% of early years childcare providers stated: we are making progress, but still have work to do
- 3% of early years childcare providers stated: I do not know what the ALN transformation programme is

- 0 out of school childcare providers stated: that they had made 0 progress in this area
- 31% of out of school childcare providers stated: we have made excellent progress in this area
- 69% of out of school childcare providers stated: we are making progress, but still have work to do
- 0 of out of school childcare providers stated: I do not know what the ALN transformation programme is

16.4 The autumn 2021 survey with early years childcare, out of school childcare settings/providers and childminders sought to ascertain where/which providers/organisations that they had accessed and received training from in the past 3 years?

The ten most recurrent sources stated were:

1. Mudiad Meithrin
2. High Speed Training: <https://www.highspeedtraining.co.uk/>
3. PACEY (Health and Safety) training stated by childminders
4. National Day Nurseries Training
5. Flying Start originating training
6. Makaton training
7. Open University
8. Clybiau Plant Cymru Kids Clubs
9. ADT Training (Arfon Dwyfor training)
10. Training via a Virtual College

16.5 Also on the theme of training, the July 2021 SASS Self Assessment of Service Statement responses highlighted how:

- 7.5% of (all type of) childcare providers stated that they had offered/organised less training for their staff as a result of COVID-19
(of these respondents, four stated that this was also affected by a lack of staff cover)
- 0 childcare providers stated that they had offered/organised *more* training for their staff as a result of COVID-19.

Plus the SASS Self Assessment of Service Statement invited childcare providers to respond to the following question: *Do you currently have access to the training that you need?* 79% of responding childcare providers stated: Yes.

Finally, as part of the SASS Self Assessment of Service Statement process, childcare providers were asked: *Have you been able to access specific Infection Prevention Control (IPC) training?* The responses saw 64% of childcare providers stating yes and 36% stating no.

16.6 The autumn 2021 survey with early years childcare and out of school childcare settings ascertained the number of childcare career apprentices that were currently being employed throughout the locality.

34% of responding early years childcare providers/settings and out of school childcare providers/settings stated that they did employ at least one apprentice at their setting - and across all relevant settings this totalled 25 apprentices.

6% responding early years childcare providers and out of school childcare providers stated that they currently did not employ any childcare apprentices **but were** looking to recruit to such role(s) in the near future and; 60% of responding early years childcare providers and out of school childcare providers stated that they had **no immediate plans to recruit any apprentices**.

16.7 As part of the autumn 2021 survey with childcare providers, the theme of potential gaps in training was addressed.

15% of responding early years childcare settings/providers – i.e. full day care providers and sessional care providers – considered that there was training/experience gaps aligned to their setting – and in order of frequency with which they were, the repeated ones were:

- Gap(s) associated with the Curriculum for Wales – stated by 6 respondents
- First Aid training – stated by 5 respondents
- Speech and language themed training – stated by 3 respondents

The same percentage, 15% of responding out of school childcare providers considered that there was training/experience gaps aligned to their setting – and the one repeated subject was first Aid training – stated by 3 respondents.

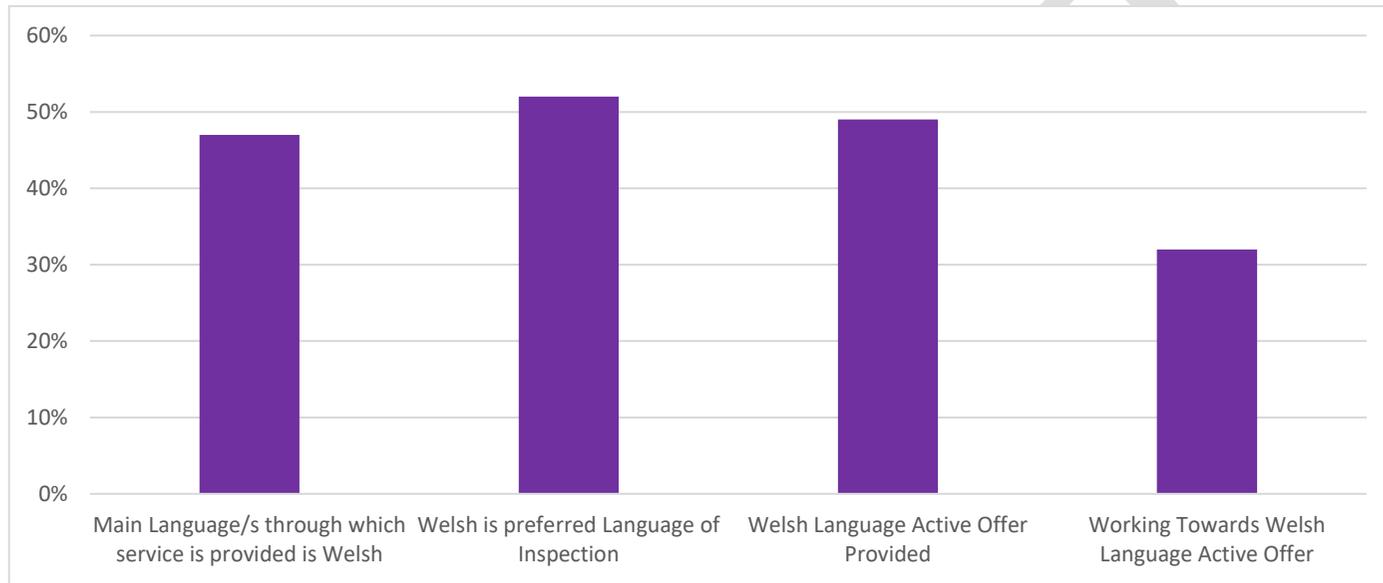
28% of responding childminders considered that they, or an assistant, had a training/experience gap, with the repeated ones being

- First Aid training – stated by 3 childminders
- Gap(s) associated with the Curriculum for Wales – stated by 2 childminders
- Early Years Training focusing on 3 months to 3 years – stated by 2 childminders

16.8 All childcare providers/settings were invited to state whether they took a Welsh language immersion approach for their curriculum? 66% stated that they did.

Table 45 indicates further detail from the SASS response of July 2021, about how the Welsh language featured in terms of the dynamics of responding Full Day Care settings and Session Care providers.

Incidence of Welsh language being incorporated into facets of early years childcare provision with Anglesey



17 Appendix 1 - Action Plan

Recommendation 1: Access to childcare, affordability and flexibility of childcare provision

Action	Responsible Officer from the Isle of Anglesey	Key Timescale	Target Outcomes	Status (HIGH, MEDIUM, LOW)
<p>The Local Authority will continue to work with partners in the early years and childcare sector to support the number of registered places which are available, to include engagement with the sector on the feasibility of flexible childcare provision and the barriers.</p> <p>The Local Authority continues to work with partners in the early years and childcare sector to ensure that the sector is confident to develop their services to provide childcare for 2 years olds. and continue to provide the Childcare</p>	<p>Flying Start Childcare and Play Coordinator.</p> <p>Childcare and Play Strategic Officer</p>	<p>June 2022 onwards.</p>	<p>That parents/carers have access to childcare operating outside current hours</p> <p>Current number of providers is maintained and additional providers supported to develop their business and new providers, such as childminders is encouraged to provide parents with a choice of childcare.</p> <p>Number of providers providing 2 and 3 year old childcare placements is 80% of the sector.</p>	<p>Medium</p> <p>Medium</p> <p>High</p>

<p>Offer as it is redesigned to an on line application format.</p> <p>Local Authority and all umbrella organisations and childcare providers provide consistent support and information to parents / carers to access childcare that is grant supported or subsidised through schemes such as Tax Free Childcare</p> <p>The local authority and umbrella bodies to scope gaps in childcare provision especially with after school and holiday provision and develop such provisions along side new providers or existing providers. The local authority to consider a childcare setting essential as part of its School Modernisation Programme.</p>			<p>An increase in the number of parents/carers making application for subsidised childcare . More parents/carers reporting childcare more affordable/ not a barrier to work/ training.</p> <p>Parents/carers have access to childcare all year round within a reasonable distance of home or work.</p> <p>Increase in childcare provision on school sites</p> <p>Increase in number of childcare places in Canolbarth Mon</p> <p>An increase in childminders across the county</p>	<p>High</p> <p>High</p> <p>Medium</p> <p>High</p>
---	--	--	--	---

Recommendation 2: The local authority and umbrella bodies continue to support childcare providers to be of a high quality

Action	Responsible Officer from the Isle of Anglesey	Key Timescale	Target Outcomes	Status (HIGH, MEDIUM, LOW)
<p>The Local Authority and umbrella bodies will continue to support as much as possible the provision of training to ensure high quality childcare settings.</p> <p>The local authority and umbrella bodies will ensure that childcare providers are informed of Care Inspectorate Wales and Estyn standards.</p>	<p>Flying Start Childcare and Play Coordinator</p> <p>Childcare and Play Strategic Officer</p>	<p>June 2022 ongoing</p>	<p>Increase in attendance at training opportunities across the childcare sector.</p> <p>Childcare settings rated as good by CIW and Estyn or demonstrate sector-leading practice.</p>	<p>Medium</p> <p>High</p>

Recommendation 3: The Local Authority and partners will continue to support the provision of childcare for children with additional learning needs.

Action	Responsible Officer from the Isle of Anglesey	Key Timescale	Target Outcomes	Status (HIGH, MEDIUM, LOW)
The Local Authority will continue to ensure that its early years childcare sector is supported and committed to the Additional Learning Needs transformation programme	Flying Start Childcare and Play Coordinator Childcare and Play Strategic Officer	June 2022-March 2025	The early years and childcare sector will be inclusive and accessible to all children Childcare providers will be confident in meeting a child's needs.	HIGH

DRAFT

Recommendation 4: The Local Authority and partners will continue to develop and support Welsh-medium childcare.

Action	Responsible Officer from the Isle of Anglesey	Key Timescale	Target Outcomes	Status (HIGH, MEDIUM, LOW)
<p>The Local Authority will continue to work in partnership with its early years and childcare sector partners, to ensure that all parents/carers and children have access Welsh-medium childcare provision</p> <p>the local authority and partners in Cwlwm and Menter Iaith will signpost staff and parents to Welsh Language classes to support the confidence of the workforce to work through the medium of Welsh .</p>	<p>Flying Start Childcare and Play Coordinator</p> <p>Childcare and Play Strategic Officer</p>	<p>June 2022-March 2025</p>	<p>Increase in childcare providers providing through the medium of Welsh</p> <p>The workforce is confident in providing care through the medium of Welsh</p> <p>Parents/ Carers report that Welsh medium childcare is readily available</p>	<p>ALL HIGH</p>

Recommendation 5: The Local Authority, Cwlwm partners and others will support childcare as a well-paid and respected career.

Action	Responsible Officer from the Isle of Anglesey	Key Timescale	Target Outcomes	Status (HIGH, MEDIUM, LOW)
<p>To review fees charged across the sector to enable a review of salaries paid across the sector</p> <p>To work regionally with the childcare sector to review recruitment and retention policies and procedures.</p> <p>To review career pathways available from young people to adults already in employment in the sector.</p> <p>Promoting childminding and work in the sector as a fulfilling career that reflects commitment and qualifications with a fair wage.</p>	<p>Flying Start Childcare and Play Coordinator</p> <p>Childcare and Play Strategic Officer</p>	<p>June 2022-March 2027.</p>	<p>Childcare fees are reflective of the business needs and sustain the sector and its staff to support salaries on a par with other professions in the early years</p> <p>Careers pathways created, an increase in number choosing to work in the sector , sustainable childcare provision.</p> <p>Staff in the sector are confident in their career pathways and opportunities and report improved pay and conditions.</p>	<p>MEDIUM</p>