2018/2019 Annual Early Years Sector Profile Report

First 5

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

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government supporting communities

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Pobal wishes to thank all those involved in the implementation of the survey and analysis and write up of this report, namely Allan Clarke, Aoife Cartwright, Ciara Flanagan, Dr Ela Hogan, Enda Shevlane, Fiona Brennan, June Simmons, Dr Patrick Collins and Peter Dowie.

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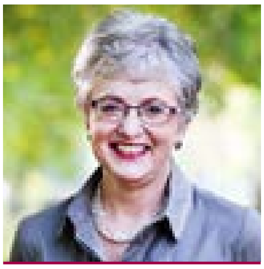

Foreword

As Minister for Children and Youth Affairs, it gives me great pleasure to publish the Annual Early Years Sector Profile report for 2018/2019. For the last 17 years, this survey, which is administered by Pobal on behalf of my Department, has played a central role in informing policy development and in assessing the impact of policy change. Moreover, the value of this data has increased with every passing year, allowing us to monitor key trends over time.

The survey has, since its inception, enjoyed unparalleled response rates for surveys of this kind and this year was no different. I am deeply grateful to the 3,821 Early Learning and Care and School-Age Childcare providers, representing 85% of the sector, who gave so willingly of their time to complete the survey. I wish to also extend my thanks to the City and County Childcare Committees for their work promoting the survey among the services in their area. As always, I am grateful to Pobal for their management of the data collection and analysis, and for producing this year's report.

The data in the report gives me much to be optimistic about. The numbers of children benefitting from State-subsidised or State-funded Early Learning and Care and School-Age Childcare has grown again this year. We are seeing greater numbers of children with additional learning needs benefitting from State funding programmes. As with previous years, I am struck by the level of engagement in continuous professional development by this committed workforce and the growth in graduates in the workforce – now 25% of all staff working directly with children – shows real progress towards meeting our 2028 graduate target of 50%, which is set out in First 5.

Clearly areas of concern remain. Increases in fees place greater challenges on parents and families. There are emerging supply issues for certain cohorts of children and in certain geographical areas. While staff wages have increased since last year, they remain unacceptably low and a consequence of this is high turnover rates.

Work is underway to build on our recent successes and address existing and emerging challenges.

Supported by unprecedented levels of State investment, guided by a range of ambitious commitments in First 5, facilitated by the National Childcare Scheme – which offers us a flexible and sustainable platform to invest in Early Learning and Care and School-Age Childcare – and together with a highly committed workforce, I look forward to continuing our journey towards Early Learning and Care and School Age Childcare that is affordable, accessible, inclusive and high quality.

Katherine E. Zappone

Dr Katherine Zappone
Minister for Children and Youth Affairs

Message from the CEO

This year marks my first as Pobal's Chief Executive Officer. I am delighted to join the organisation at such an exciting time and to work alongside the Department of Children and Youth Affairs in the production of the 2018/2019 Annual Early Years Sector Profile report. This report provides key information on the Early Learning and Care and School-Age Childcare sector in Ireland and provides Government with the evidence they need to continue developing informed, evidence-based policies in this area.

Pobal remain committed to the goal of providing accessible and quality childcare to all children in Ireland and comprehensive data on the sector is essential for us to achieve this. I am delighted to see a very high response rate again this year (85%), which clearly demonstrates the recognition of the value of this work amongst the services.

We have seen remarkable changes across the Early Learning and Care and School-Age Childcare sector in Ireland in recent years, including the development of the '*First 5*' strategy and the introduction of the landmark National Childcare Scheme. Part of Pobal's role is to support the Department of Children and Youth Affairs (DCYA) in implementing these important developments. We do this by overseeing the funding and administration of certain DCYA programmes, and also by producing accessible and useful data on the programmes themselves. Doing this enables Government to make strong, evidence-based decisions for the sector. It also ensures policy meets the needs of the children and families availing of these important services as well as the staff working to provide them.

Pobal's overarching mission is to work with Government and local and national community organisations to combat social exclusion and to improve outcomes for communities, families, individuals and children. I am therefore delighted to see an increase in the number of children benefitting from Government subsidies in 2018/19, and in the numbers of children with additional needs accessing Early Learning and Care and School-Age Childcare services.

I would like to thank the teams who administered this year's survey, analysed the data and wrote the final report. I am also grateful to our colleagues across the sector for their support, especially the City and County Childcare Committees and of course all the childcare providers who responded to the survey. This report would not be possible without the valuable information they provide and we are grateful each year for their time.

Lastly, I would like to thank the Department of Children and Youth Affairs, under the vision and leadership of Minister Zappone, for their support year after year, and for their commitment to evidence-based policy and programme development. We are honoured to work alongside them in building an inclusive, accessible and child-centred model of childcare in Ireland.

Anna Shakespeare
CEO, Pobal

Glossary of terms

ABA	Applied Behaviour Analysis
ABC	Area-Based Childhood Programme
AIM	Access and Inclusion Model
ARV	Annual Rate on Valuation
ASCC	After-school Childcare Programme
ASD	Autism Spectrum Disorder
CCC	City and/or County Childcare Committee
CCS	Community Childcare Subvention
CCSP	Community Childcare Subvention Plus
CCSR	Community Childcare Subvention Resettlement
CCSRT	Community Childcare Subvention Resettlement (Transitional)
CCSR(T)	Jointly refers to CCSR and CCSRT
CCSU	Community Childcare Subvention Universal
CE	Community Employment
CEC	Community Employment Childcare
CEC (AS)	Community Employment Childcare (After-School)
CEC (PS)	Community Employment Childcare (Pre-School)
CETS	Childcare Education and Training Support Programme
CSO	Central Statistics Office
CSP	Community Service Programme
DCYA	Department of Children and Youth Affairs
DEASP	Department of Employment Affairs and Social Protection
ECI	Early Childhood Ireland
ECCE	Early Childhood Care and Education Programme
ED	Electoral Division
EDI	Equality, Diversity and Inclusion Training Programme
ELC	Early Learning and Care
ETB	Education and Training Board
ELCC	Early Learning and Care Capital
HSE	Health Service Executive
JI	Job Initiative Scheme
LINC	Leadership for Inclusion in the Early Years
NCS	National Childcare Scheme
NFQ	National Framework of Qualifications
PIP	Programmes Implementation Platform
SAC	School-Age Childcare
SACC	School-Age Childcare Capital
TEC	Training and Employment Childcare
TSP	Transitional Support Payment
UDG	Universal Design Guidelines for Early Learning and Care Settings
VCO	Voluntary Childcare Organisation
YESS	Youth Employment Support Scheme

Executive summary

This report presents an overview of the Early Learning Care (ELC) and School-Age Childcare (SAC) sector in Ireland for the programme year 2018/19. It outlines the findings and analyses of data captured from two sources: the Early Years Service Profile survey, completed by 85% of ELC and SAC services (3,821) between May and June 2019, and the Programmes Implementation Platform (PIP). The following are the key findings:

Programme enrolment and ELC and SAC services

Over the programme year 2018/19, **nine in every ten children** (185,971 in total) **participated in at least one of the Department of Children and Youth Affairs (DCYA) funded programmes:** Early Childhood Care and Education (ECCE), Community Childcare Subvention (CCS) (including CCS, CCSPlus and CCSU) or Training and Employment Childcare (TEC).

The total number of ELC and SAC services contracted to deliver at least one programme was 4,598, an increase of 55 services (1%) since last year. While the growth in the number of services was slower this year, services increased in size, with 47 children enrolled on average in a service compared to 44 last year.

Over the programme year 2018/19, **108,204 children benefitted from the ECCE programme**. This represents a 9% decline on the previous year. This decrease is explained by a number of factors, including changes in the programme rules and the reduction in the overall number of children in the eligible age cohort. The total value of the ECCE programme registrations in 2018/19 was €267,582,672.

3,197 services were contracted to offer CCSP and 835 services were contracted to offer CCS in 2018/19. The combined value of CCS and CCSP registrations in 2018/19 was €114,002,199. Over the programme year, **the total number of children availing of CCS/CCSP** was **45,594** – an increase of 17% on the previous year.

The total number of **children who availed of CCSU supports** during the 2018/19 programme year was **33,743**, a reduction of 14% on the previous year. This change was, like in the case of the ECCE programme, primarily a result of changes in the ECCE programme rules.

In 2018/19, 1,684 services were contracted to offer at least one strand of the TEC programme, representing an increase of 2% since last year. The majority of these services offered CETS (95%). **A total of 3,474 children availed of the TEC programme over the entire programme year.** This is a reduction of 25% since last year. The continuing decline in the take up of TEC places is likely to be associated with a number of different factors, including that parents may be choosing to avail of CCSP instead of TEC, if eligible for both programmes. The total value of TEC registrations came to €8,735,485, a reduction of 26% since last year.

During the 2019 calendar year, 238 applications for capital funding were approved to a total value of €6,255,964 under ELC and SAC Capital Programmes.

The majority of ELC and SAC services are operated by private, for-profit organisations. In 2018/19, 74% of all services were private, while 26% operated on a not-for-profit basis. Two thirds of services were located in urban areas and majority of services (85%) were located in areas classified as either marginally above or below average on the Pobal Haase-Pratschke Deprivation Index.

The majority of services that responded to the survey (55%) had a capacity of up to 40 places in their service (sum of children enrolled and vacant places). One in ten services had a capacity to cater for more than 100 children.

Almost one third of the services (31%), who responded to the service profile survey, were charged commercial rates in 2018/19. The average rate these services were billed was **€4,785**.

373 services reported that they provided ELC/SAC through the medium of Irish.

Inclusion and disability

The number of services with at least one Traveller child attending was 650, or 17% of all services. This represents a 1% increase on the 2017/18 figure. 7% of services reported having at least one Roma child attending, which is the same as the previous year. It can be estimated that there were 3,015 Traveller children and 789 Roma children attending ELC/SAC services in 2018/19.

In 2018/19, **2,388 services were supported under the Access and Inclusion Model, in respect of 5,513 children**. Relative to the previous year, there was a 22% increase in the number of services receiving support under AIM and an increase of 34% in the number of children supported.

Over three quarters of services (77%) cater for at least one child with additional needs and 54% have at least one child with a diagnosed disability attending.

The proportion of services with staff who have completed the Equality, Diversity and Inclusion (EDI) Training Programme is 61%, while the number of providers with an inclusion policy in place is 97%.

Spaces, capacity and waiting lists

It is estimated that there were **206,301** children enrolled in ELC and SAC services during 2018/19. This represents **a 2% increase on the previous year**. Children aged 3-5 years remain the largest age group amongst those enrolled, accounting for 55% of all enrolments. Compared to the previous year, the number of children enrolled in each age group increased with the exception of babies and children aged 3 years+ to 4 years. The highest increase (21%) was observed for children aged 8 years and over.

Like last year, 24% of services reported having at least one vacant place. The number of **vacant places increased by 13% this year to an estimated 12,444**. While the number of vacant places for children aged over 3 years increased since last year, this figure continued to decrease for younger children (up to 3 years old).

The vacancy rate in 2018/19 was 6%, which was an increase of 1% from last year.

The **overall estimated capacity was 218,745**, representing an increase of 2% from last year. The growth in capacity is proportionate to the increase in the number of children enrolled (2%), indicating the proportion of vacant places remained the same. When combined with the increased numbers on waiting lists, these figures suggest more places need to be created in order to meet demand, especially for children up to 3 years of age. Of the services surveyed, 25% reported they planned to increase their capacity.

Fees

The **average weekly fee for full day provision is €184.36**. This represents an **increase of €6.44** or 3.6% since last year. This is the third consecutive year of fee increases after several years of fee stagnation. The average weekly fee for part-time provision is €109.98, which is an increase of €8.16 or 8% on last year. The average weekly fee for **out of term SAC was €143.02**.

The highest average full day fees are generally charged for babies (€195.51) and the lowest for children aged 5+ to 6 years – €169.64.

Fees charged by services in affluent locations continue to be higher than by those situated in disadvantaged areas (€56.93, or 33%, higher on average for full day provision per week). As in previous years, average fees are also **higher in urban areas** than in rural areas (€191.33 and €165.76, respectively for full day provision per week), **and in private services** than in community services (€190.74 and €168.12, respectively for full day provision per week).

Staff

It is estimated that approximately **30,775 staff work in the Early Learning and Care and School-Age Childcare sector**, of whom 26,882 (87%) work directly with children. This is **an increase of 4% on the previous year**, and represents a higher overall increase than the number of children enrolled (2%). This indicates that the number of staff in the sector is growing faster than the number of children enrolled.

Almost half of staff worked over 30 hours per week (46%). Staff working in private, for-profit, services worked more hours per week on average, with 43% working 36 hours or more compared to 22% of staff in community, not-for-profit, services. As in 2017/18, nearly all staff working in private services were directly employed (99%), relative to 80% of those working in community settings. The remainder of staff working in the community services are employed through various employment schemes/other Government-funded programmes.

The workforce remains **predominantly female**, with women constituting 98.2% of all staff working directly with children. The number of males working directly with children increased slightly from 1.5% in 2017/18 to 1.8% this year.

The majority of staff (59%) worked in the service for four years or less, while 61% of staff worked five years or more in the ELC and SAC sector. This suggests significant levels of inter-service mobility within the sector.

Staff qualifications

The vast majority of staff working directly with children (94%) have qualifications at NFQ Level 5 or higher and over two thirds (67%) have qualifications at NFQ Level 6 or higher. The proportion of staff with NFQ Level 7 qualifications and above increased by 5% since 2016/17 – with one in four staff now holding a qualification at NFQ Level 7 or higher. The proportion of staff with no qualification relevant to the ELC and SAC sector is 6%, the same as in the previous year.

The proportion of staff who have signed the **'Grandfather Declaration' is 5%** and remained the same as in the previous two years.

3,659 staff were reported to be in the process of attaining a qualification, of whom 80% were studying at NFQ Level 6 or higher.

Staff wages and turnover

The **average hourly wage of staff working in the sector is €12.55**. When staff on employment schemes/programmes are included, the average wage is €12.37 – this represents a 3% increase on the previous year's average hourly wage of €12.17. The average rate for early years assistants (both ECCE and non-ECCE), who constitute 49% of all staff working with children, is €11.46 per hour.

The top five determinants of staff wages are (in descending order): staff position/job title, length of time in service, number of non-contact hours per week, county, and highest qualification attained.

Centre managers are, on average, paid the highest hourly rate at €15.56 per hour, while relief staff and early years assistants (non-ECCE) earn the least (€11.03 and €11.15, respectively).

Wages differ notably at the county level, with average hourly rates ranging from €11.56 in Sligo to €13.64 in Dublin City.

The annual **staff turnover rate is 23%,** which is down from 25% the previous year. Staff turnover rates differ across counties, from 15% in Kilkenny to 36% in Dún Laoghaire-Rathdown.

Over four in ten services reported having at least one staff who had left the service. In total, services reported 3,888 staff who left, of whom 93% had an NFQ Level 5 qualification or above.

Just under a quarter of services reported having a staff vacancy (23%), representing a 3% decrease on last year's figure. The highest share of vacancies (46%) was for staff qualified to NFQ Level 6. 53% of services reported difficulties in recruiting staff over the past 12 months, which is 4% less than in 2017/18.

Child protection

The proportion of staff who have completed Children First training over the past three years is 72%. This is an increase of 2% on the previous year.

1 Background and context

1.1 Introduction

This report presents an overview of the Early Learning and Care and School-Age Childcare sector in Ireland for the programme year 2018/19. For the past seventeen years, Pobal has completed an annual survey of the sector (previously called the Annual Beneficiary Questionnaire and Annual Sector Survey) providing data and analysis needed to support evidence-based policy and planning for the sector.

This report brings together and analyses the data held in the Programmes Implementation Platform (PIP) and collected through the service profile survey from Ireland's Early Learning and Care (ELC) and School-Age Childcare (SAC) providers. Given the breadth of these data sets, a practical, issue-based approach has been taken to the analysis of this information. Following consultation with numerous stakeholders, the key issues of importance were identified and subjected to detailed analysis. These included: capacity, childcare fees, staff wages, staff qualifications, and staff turnover. The report is structured as follows:

Chapter 1 presents the changes in the policy and funding context for the ELC and SAC sector in the 2018/19 programme year and outlines the methodology used for data collection and analysis.

Chapter 2 provides an overview of the three ELC/SAC programmes – Early Childhood Care and Education (ECCE), Community Childcare Subvention (CCS and CCSP) and Training and Employment Childcare (TEC) – including statistics on the number of services participating, the number of registrations and the total funding received by providers for the delivery of these programmes. It also outlines key statistics on supports provided under the Access and Inclusion Model (AIM) and funding under Early Learning and Care and School-Age Capital (ELCC and SACC) 2018.

Chapter 3 analyses ELC and SAC services with regard to their type, geographical location, types of childcare service provided, premises ownership and location, commercial rates, curricula and other characteristics.

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

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

Chapter 6 presents a breakdown of childcare fees by type of services offered, geographical location, organisation type, deprivation score and staff qualifications. It includes information on school-age childcare care fees, both in term and out of term.

Chapter 7 gives an overview of staff working in ELC and SAC services, including those working directly and indirectly with children. It provides an analysis of staff profiles, their qualifications and wages, as well as staff turnover.

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

1.2 Early Learning and Care and School-Age Childcare sector: frameworks, supports and developments

Better Outcomes, Brighter Futures – The national policy framework for children and young people 2014–2020 (DCYA, 2014) has been the main policy document guiding the development of the sector over the last few years. The framework identifies a set of priorities aimed at strengthening the support system around the child and young person. Importantly, it also outlines a commitment to accessible, affordable and quality Early Learning and Care (ELC) and School-Age Childcare (SAC) and workforce development across the sector. The priority areas include the following:

- Better support parents and families
- Focus more on children's early years
- Work together to protect young people at risk
- Enhance job opportunities for young people
- Tackle child poverty
- Promote positive influences for childhood
- Improve childhood health and wellbeing

In November 2018, *First 5: A Whole-of-Government Strategy for Babies, Young Children and their Families* was published. The *First 5 strategy* sets out a vision for babies, young children and their families for the next ten years across the various aspects of their lives, including family and community supports, physical and mental health and early learning and care services. The *First 5 Implementation Plan 2019-2021* was published in May 2019 and identified the first five big steps towards the achieving the vision set out in the *First 5 strategy*:

1. Access to a broader range of options for parents to balance working and caring
2. A new model of parenting support
3. New developments in child health
4. Reform of the Early Learning and Care (ELC) system
5. A package of measures to tackle early childhood poverty.

First 5 emphasises the importance of research, data, monitoring and evaluation as key building blocks for an effective early childhood system. The information collected from this survey will inform the implementation of actions in the First 5 strategy relating to ELC and SAC, including the development of a new funding model for the sector and a workforce development plan.

The following sections outline the main initiatives, changes and developments affecting the ELC and SAC sector introduced or taking place over the last year.

1.2.1 National Childcare Scheme (NCS)

The National Childcare Scheme (NCS) was announced as part of Budget 2017 and is one the biggest changes introduced in the ELC and SAC sector in recent years. NCS seeks to replace pre-existing targeted childcare programmes with a single, streamlined and more user-friendly scheme and will include “wraparound” care for pre-school and school-age children. Its objectives are to improve outcomes for children, reduce poverty, facilitate labour activation and tangibly reduce the cost of childcare. The scheme is set to open in late 2019.

The scheme provides subsidies to families with children aged between 24 weeks and 15 years who are attending any participating, Túsla-registered, ELC/SAC service. Parents will apply directly to the scheme for financial support, meaning providers will no longer need to manage parental paperwork in order to apply for subsidies.

There are two types of subsidies that parents/children will be eligible for:

- **Universal subsidies** are available to all families with children under 3 years old and families with children over 3 years who have not yet qualified for the free pre-school programme (ECCE). This subsidy is not means tested and provides 50 cent per hour towards the cost of a registered childcare place for up to a maximum of 40 hours per week.
- **Income assessed subsidies** are available to families with children aged between 24 weeks and 15 years. This subsidy is means tested and will be calculated based on individual circumstances, including level of family income, child’s age and educational stage and number of children in the family.

Over 600 nationwide NCS training sessions have been held for ELC and SAC services. Training sessions were facilitated by the local City and County Childcare Committees.

In June 2019, the Minister for Children and Youth Affairs announced that €2 million would be available to support ELC and SAC services to meet the administrative requirements associated with transitioning to the new scheme within the first year. A Transitional Support Payment (TSP) was made available for services who enter into a contract for NCS. Payment amounts are calculated based on the number of children registered in the service. When the scheme closed for applications on 13th September 2018, at total of 3,239 services had applied for funding.

1.2.2 Merging of CCS and CCSP and transition to NCS

The Community Childcare Subvention Scheme (CCS) was merged with the Community Childcare Subvention Plus (CCSP) scheme at the end of 2018/19 programme year in August 2019. CCSP, which has been in place since 2016, has identical eligibility criteria, levels of service and band rates as CCS.

Community providers can register children on the CCSP scheme for the 2019/20 programme year up until the roll out of NCS, scheduled for late 2019. Up until the launch of NCS, all current targeted schemes (TEC and CCSP) will remain in place for parents. Parents whose children have been registered on the targeted schemes prior to the launch of NCS, can choose to either remain on the scheme for the remainder of the programme year or transfer to NCS.

1.2.3 Programme Support Payment

The Department of Children and Youth Affairs (DCYA) introduced the Programme Support Payment in 2016 in recognition that additional time is required of providers of DCYA funded ELC and SAC programmes to complete the administrative work associated with the scheme. The payment also recognises that time is required to perform activities outside of contact time with children, such as preparing materials for sessions and assisting parents in understanding how they might benefit from the various schemes supported by the State.

A budget of over €19 million has been made available for 2019 for this payment, an increase of approximately €1 million on the previous year.

1.2.4 Capital funding 2019

Capital funding is provided by the DCYA to support infrastructural improvements to childcare facilities. The funding is awarded on a calendar year basis. In 2019, the total amount of funding provided for Capital was €6.27 million for Early Learning and Care and School-Age Childcare Capital 2019 and €3 million for the National Childcare Scheme Capital.

1.2.4.1 Early Learning and Care and School-Age Childcare Capital

A total of €6,270,964 in capital funding was awarded to providers of ELC and SAC for capital investment under the 2019 capital programme. The focus of the funding in 2019 was to continue the expansion of places for children under 3 years of age and for school-age children. Funding was also made available to aid community services in addressing fire safety issues.

The capital programme for 2019 operated under three strands:

Early Learning and Care Capital (ELCC)

Strand A: Creation of new places for 0–3 year olds – €3,729,615

Strand B: Fire Safety for community ELC services – €337,892

School-Age Childcare Capital (SACC)

Strand C: Creation of new school-age childcare places – €2,203,457

1.2.4.2 National Childcare Scheme Capital

In June 2019, the National Childcare Scheme Capital Grants scheme was announced by the Minister for Children and Youth Affairs with a budget of €3m for allocation to ELC and SAC services who enter into contract for the NCS. Further information on the NCS is provided in section 1.2.1.

This capital grant scheme aimed to assist providers to purchase computer equipment and software to record and report on attendance of children in their service, which is a statutory and contractual obligation under the NCS. Grants, of a value between €500 and €2,000, based on the number of active registrations, could be applied for through the Programme Implementation Platform (PIP).

1.2.5 Leadership for Inclusion in Early Years (LINC)

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

Programme is being delivered by a consortium, led by Mary Immaculate College and including the Froebel Department of Primary and Early Childhood Education, Maynooth University, and Early Childhood Ireland (ECI).

In 2019, up to 1,150 free training places were made available to pre-school practitioners on the LINC programme, which commenced in September 2019.

1.2.6 Registration of school-age childcare services

The regulations requiring the registration of school-age childcare services came into effect in February 2019. Services offering school-age childcare must now be registered with Túsla. This is a new requirement as school-age childcare services have not been subject to registration before February 2019. This new requirement aims to ensure the provision of quality school-age childcare.

Once registered, school-age childcare services will be able to participate in the forthcoming National Childcare Scheme, which will allow families availing of these services to access the financial benefits provided by the scheme.

1.2.7 Draft Childminding Action Plan

In August 2019, the Minister for Children and Youth Affairs launched the *Draft Childminding Action Plan* that sets out proposals for improving access to high quality and affordable ELC and SAC through childminding. Childminding is a common form of childcare in Ireland and offers many benefits to children and parents, however, it currently receives little formal recognition by the State. This Action Plan sets out a 10-year plan for moving childminding into the mainstream of regulation and State support. The plan includes proposals to extend supports and regulation to all paid, non-relative childminders, with a phased approach to reforms.

1.2.8 Universal Design Guidelines for Early Learning and Care settings

In June 2019, the Minister for Children and Youth Affairs launched the *Universal Design Guidelines for Early Learning and Care settings (UDG)*. These guidelines aim to ensure that all ELC services are accessible to all children and offer guidance on the refurbishment, renovation and the building of ELC facilities in Ireland. They will also be useful for built environment design professionals in private and public sectors working on the design of new build and retro-fitting of ELC settings.

The work on the Guidelines was undertaken by Early Childhood Ireland and Trinity Haus (Trinity College Dublin) on behalf of the DCYA and the Centre for Excellence in Universal Design at the National Disability Authority.

1.3 Methodology

1.3.1 Data sources

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

- Programmes Implementation Platform (PIP) (Chapter 2, and sections 3.1, 3.2 and 3.3)
- Service profile survey (Sections 3.4 to 3.11 and Chapters 4 to 8).

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

1.3.1.1 Service profile survey

A total of 4,497[1] services with an active contract for the 2018/19 school year were invited to complete the service profile survey. A link to the survey was posted on the PIP portal on 10th May 2019, and services were given until 24th May 2019 to complete it. This deadline was subsequently extended to 7th June 2019 to allow services more time to complete the survey. **A total of 3,821 services completed the service profile survey, giving a response rate of 85%**. Of those services, 1,029 were community services and 2,792 were private.

1.3.1.2 Programmes Implementation Platform (PIP)

PIP is a live system that is updated daily. To ensure consistency across the different areas covered, all data were extracted on one date (19th June 2019). Please note that the figures included in Chapter 2 provide information about the three programmes on this 'snapshot date', and are not the final figures for the 2018/19 programme year. Summary figures for the entire programme year are included in section 2.7.

1.3.2 Extrapolation methodology

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

To extrapolate the number of children nationally, the following procedure was applied. For each county, the number of services contracted to provide at least one of the DCYA programmes and the corresponding number of registrations for these services were extracted from PIP. The next step was to look at the number of services who completed the service profile survey and match the corresponding number of registrations on PIP for these services. This allowed

1 Note: this figure varies from the figure of total number of services who offered at least one DCYA programme (4,598) presented in Chapter 3. These figures were extracted from PIP at different times and different methodologies were used to arrive at them.

for extrapolation of the percentage of registrations in services who completed the service profile survey, as well as the extrapolated number of children accessing childcare by county. This percentage has also been used for the extrapolation of staff figures, as it is likely that the correlation between the number of staff and the number of children will provide a more accurate basis upon which to make estimates than by using the response rate.

1.3.3 Statistical analysis

At various stages of the first order analysis we used two types of averages, the mean and the median. Where the term average is used this implies the arithmetic mean while it will be explicitly stated when the median is use. Median is used in cases where there is a need to demonstrate the central tendency of that value as it is largely skewed to one side and it is unfair to use the mean.

Various machine learning and statistical techniques to enhance multivariate analysis were used in our analysis. These techniques were undertaken to search for correlations and factors of influence on certain profile attributes beyond the first order analysis. In the case of fees and wages, regression tree modelling was used to identify the factors of influence on these said attributes. The variables of interest are extracted from the sum of information gain across each node in the regression tree. These influence values were then scaled to see what percentage they accounted for among all the variables in the model.

1.3.4 Urban/rural methodology

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

1.3.5 County methodology

The term county can be used to describe county divisions or local authority areas. In this report ‘county’ is used to describe local authority areas, but also serves as a proxy for the City/County Childcare Committee (CCCs) areas. Using the local authority areas as the main geographical unit allows for comparisons of services within large urban centres, i.e. Dublin, as well as within counties that include both large urban centres and rural areas, i.e. Cork. Please note that there are three counties with more than one local authority area: Dublin, Cork and Galway. CCC areas in both Dublin and Cork are aligned to the local authority areas, however, this is not the case in Galway. Galway CCC represents both the city and county and, therefore, in the report Galway is represented as CCC area rather than local authority categorisation.

1.3.6 Presentation of data and analysis

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

2 Overview of the Department of Children and Youth Affairs Early Learning and Care and School-Age Childcare funding programmes

Overview of the Department of Children and Youth Affairs Early Learning and Care and School-Age Childcare funding programmes

185,971

children benfited from at least one of the three Government programmes (ECCE, CCS (incl. CCSP, CCSU, CCSR(T)) or TEC)

€6,255,964

invested into 220 services through ELCC and SACC capital funding

17%

the increase in the number of children availing of CCS/CCSP

9 in every 10

children enrolled availed of at least one Government programme

2,388

services were supported under the Access and Inclusion Model, benefitting

5,513 children

€409,286,099

the combined approved registration value for the three Government programmes

9%

the decline in the number of children availaing of ECCE

2.1 Introduction

The Department of Children and Youth Affairs (DCYA) leads the effort to improve the outcomes for children and young people through investment in the Early Learning and Care (ELC) and School-Age Childcare (SAC) sector, via a number of programmes[2].

Pobal provides a range of services to and on behalf of DCYA in the areas of ELC and SAC, and manages the distribution of funds for the following programmes:

- Access and Inclusion Model (AIM)
- Area-Based Childhood Programme (ABC)
- Better Start
- Community Childcare Subvention (CCS)
- Community Childcare Subvention Plus (CCSPlus) (including CCSP, CCSU and CCSR(T))
- Early Learning and Care and School-Age Childcare Capital Programmes (ELCC/SACC)
- Free Pre-school Year in Early Childhood Care and Education (ECCE)
- Learner Fund
- National Childcare Scheme (NCS)
- Training and Employment Childcare (TEC)

In addition, the sector is supported by the City and/or County Childcare Committees (CCCs) and Voluntary Childcare Organisations (VCOs), with Pobal channelling the funding provided by DCYA and delivering technical support to these organisations.

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

2.2 Early Childhood Care and Education (ECCE) – pre-school programme

Early Childhood Care and Education (ECCE) is a universal programme available to all children within the eligible age range. In 2018/19, eligible children were aged between 2 years, 8 months and 5 years, 6 months. It provides children with their first formal experience of early learning prior to commencing primary school. The programme is provided for three hours per day, five days per week over 38 weeks per year, and the programme year runs from September to June.

Over the last two programme years there were three points of entry throughout the programme year – September, January and April. However, in 2018/19 this was changed to one point of entry – in September.

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

Services taking part in ECCE must provide an appropriate pre-school educational programme which adheres to the principles of *Síolta,* the national quality framework and *Aistear*, the national curriculum framework. Staff from local CCCs may also support ELC services with assistive visits and advice. The State pays a capitation fee to participating ELC services. In return, they provide a pre-school service free of charge to all children within the qualifying age range for a set number of hours and days over a set period of weeks. Details of services offering the ECCE Programme can be viewed on Pobal Maps[3].

In 2018/19, 4,227 services were contracted to offer the ECCE programme nationally, of which 76% (3,214) were private and 24% (1,013) were community. These are the same proportions as last year.

Up to June 2019, 108,137 children benefited from ECCE and there were 117,367 recorded registrations.[4] The total number of children availing of ECCE decreased on the previous year (by 9%) due to a number of reasons, including changes in the programme rules – in the previous year there were three intakes into the programme (September, January and April), while in 2018/19 there was only one intake (September). The change in the intake periods meant that children availing of ECCE in 2018/19 benefitted from the programme for longer, on average 36.9 weeks per child compared to 32.5 in 2017/18. Additionally, the number of ECCE-eligible children nationally has declined due to the drop in birth rates in recent years. The approximate number of eligible children for the 2017/18 programme call was 136,249 compared to 132,831 for the 2018/19 programme call.

As was the case in 2017/18, the majority of registrations (77%) were in private services. Figure 2.1 provides a county level breakdown of ECCE registrations by type of provider.

The total value of approved ECCE contracts in 2018/19 was €294,629,286, which represents an increase of 12% (€31,855,343) from the previous year. The increase in the approved contract values can be attributed to an increase in the capitation rates (both standard and higher), the increase in the number of services receiving the higher rate as well as children availing of the programme, on average, for more weeks than in the previous year. The inclusion of AIM Level 1 payments and Programme Support Payments in the value of ECCE contracts is also a contributing factor.

Services participating in ECCE 2018/19 received one of two capitation rates: the standard rate of €69.00, which was increased from €64.50 in 2017/18, or the higher rate of €80.25, which increased from €75.00 paid in the previous year. In 2018/19, over half of ELC services (55% or 2,312 services) had higher capitation levels for at least one room, an increase of 12% on the previous year. 57% of private services are in receipt of higher capitation compared to 46% of community services.

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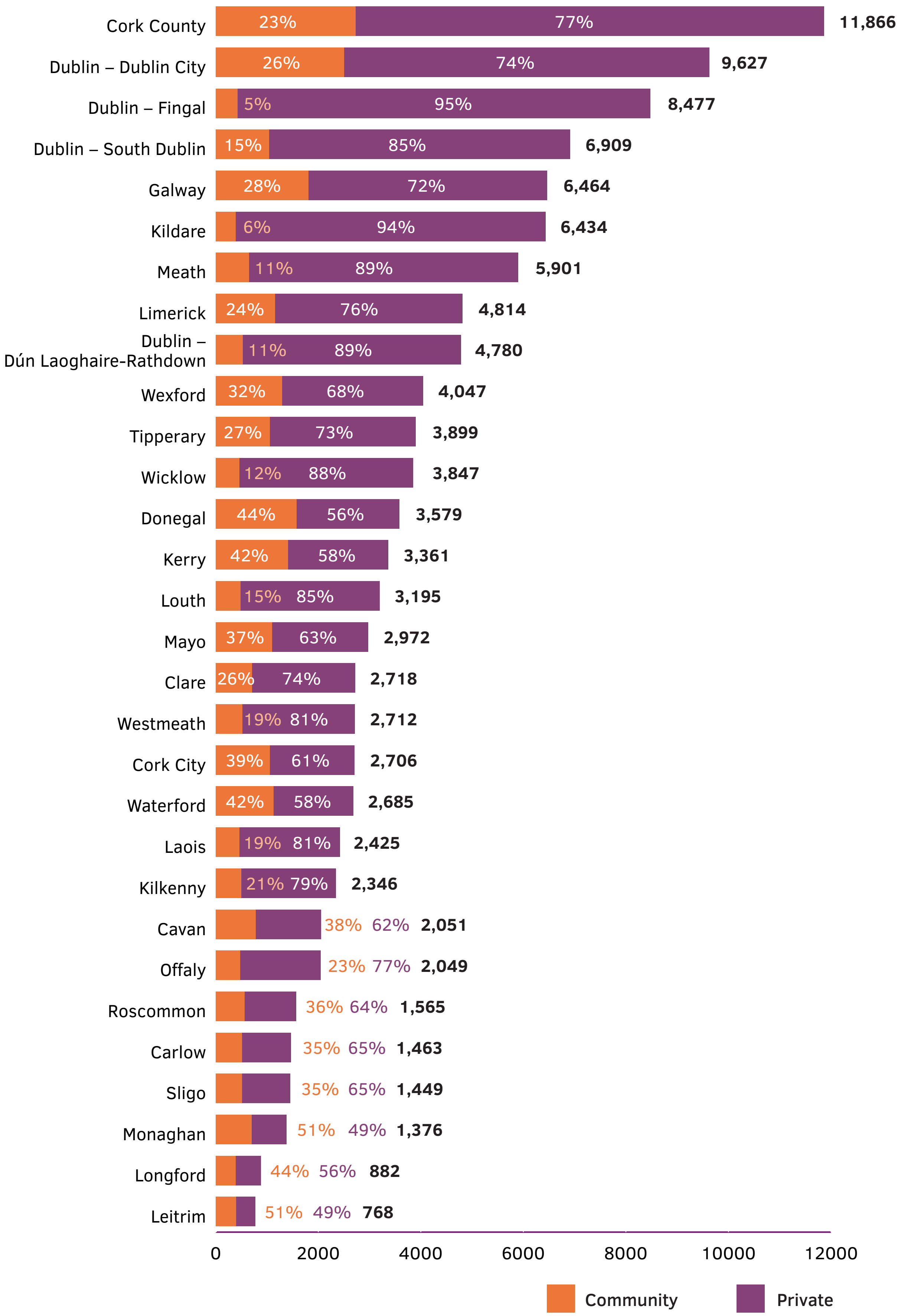
3 https://maps.pobal.ie/

4 The number of registrations is greater than the number of children, as a child can be registered more than once. This occurs if a child moves from one pre-school to another over the course of the year. In exceptional circumstances, a child can be registered simultaneously in two services. For further details, please see: https://www.gov.ie/en/publication/89ed39-rules-for-childcare-funding-programmes-201920/?referrer=/documents/earlyyears/20170724rulesfordcyachildcarefundingprogrammes20172018.pdf/

Figure 2.1 Number of ECCE registrations by county and organisation type 2018/19



2.3 Community Childcare Subvention (CCS and CCSP)[5]

The Community Childcare Subvention (CCS) programme is primarily aimed at supporting parents on a low income to avail of reduced childcare costs. The DCYA funds a portion of these costs for eligible children (a subvention payment), while parents pay the remainder. A child had to be under 15 years of age to be eligible for CCS supports in 2018/19.

However, no child could be eligible for a subvention if he/she was enrolled simultaneously on any other DCYA funding programme. In the 2018/19 programme year, Community Childcare Subvention included a number of strands:

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

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

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

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5 Information about these strands is available on the website of the DCYA, via the following link: https://www.gov.ie/en/publication/2459ee-early-childhood-care-and-education-programme-ecce/

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

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

The level of CCS and CCSP payments is based on four eligibility bands[7]. Table 2.1 shows the eligibility bands and weekly subvention rates for CCS and CCSPlus, while Table 2.2 specifies the universal subvention rates per session type.

Table 2.1 Eligibility bands and weekly subvention rates under CCS and CCSPlus in 2018/19

Session type[8]	Band A	Band AJ	Band B	Band D
CCS and CCSPlus Full day	€145	€80	€70	€50
CCS and CCSPlus Part-time	€80	€80	€35	€25
CCS and CCSPlus Sessional	€45	€45	€25	€17
CCS and CCSPlus Half session	€22.50	€22.50	€12.50	€8.50

Table 2.2 Maximum subvention rate by universal session type

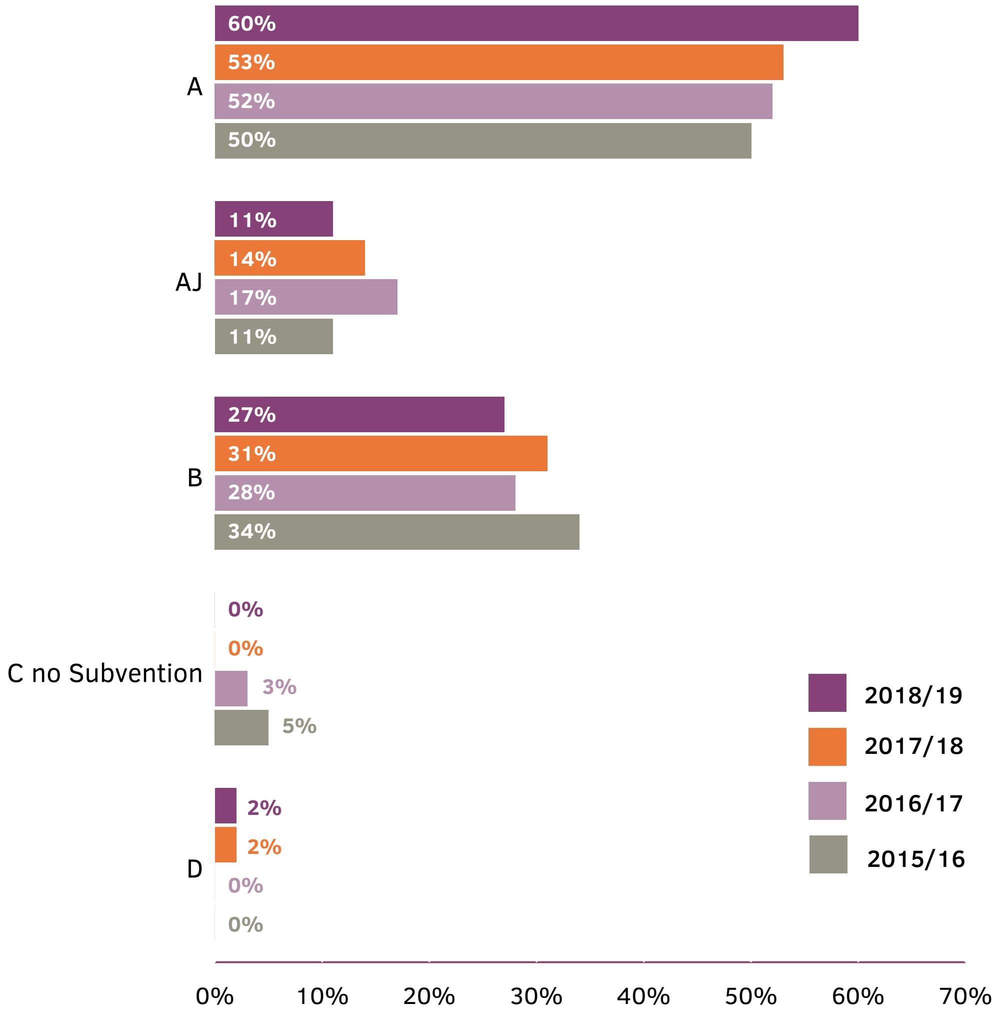
Service type	Rate per week	Rate per day
CCS Universal Full day	€20	€4
CCS Universal Part-time	€10	€2
CCS Universal Sessional	€7	€1.40
CCS Universal Half session	€3.50	€0.70

Figure 2.2 presents the breakdown of CCS and CCSPlus registrations by band since 2015/16. There has been a gradual increase in the number of registrations with Band A since 2015/16 with inter-year interchanges between bands AJ and B. The increase in the number of registrations with Band A has been more evident this year, with a 7% increase on the last year. There has been a decrease in the uptake of Bands AJ and B of 3% and 4%, respectively, since last year, while Band D remains unchanged at 2%. The changes in the distribution of bands mean that overall, in 2018/19, more children availed of higher value payments under CCS/CCSP compared to the previous year.

7 Details of the bands' eligibility criteria are available at https://www.gov.ie/en/publication/ea9ec3-transitional-rules-for-dcya-targeted-childcare-programmes/

8 Service/placement types are: full-day care places (more than five hours per day); part-time places (between 3 hours 31 minutes and 5 hours per day); sessional places (between 2 hours 16 minutes and 3 hours 30 minutes per day); and half-session places (between 1 hour and 2 hours 15 minutes per day).

Figure 2.2 Percentage of CCS and CCSP registrations by band



In 2018/19, 3,197 services were contracted to offer CCSP, of which 68% were private services and 32% community services. 835 services were contracted to offer CCS in 2018/19, representing an 8% decrease since last year. There was a smaller reduction of 6% in the number of services contracted to offer CCSP in the same period.

86% of community services and 64% of private services offer CCSP, a reduction of 2% and 6%, respectively, since last year.

69% of services offered CCS during 2018/19, a decline of 6% since last year. 119 services who were contracted to provide CCS during 2017/18 were no longer providing it in 2018/19. Of these, almost two thirds (65%) were based in urban areas with the remainder in rural areas. Almost half (54%) of these services have a deprivation index of marginally below average, 26% of services had a deprivation index of marginally above average and 14% were classified as disadvantaged[9].

9 Based on 118 services. Level of deprivation and urban/rural classification could not be determined for one service which was in contract for 2017/18.

476 services who were contracted to provide CCSP services in 2017/18 (excluding those with CCSU registrations) were no longer providing it in 2018/19. The majority of these (76%) were private services with the remaining 24% community services. 64% of these services were based in urban areas and 36% are in rural areas[10]. Almost half (44%) of these services had a deprivation index of marginally above average, 42% of services had a deprivation index of marginally below average and 7% were located in affluent areas[11].

The total value of approved CCS contracts in 2018/19 was €33,072,772, while the total value of approved CCSP contracts was €101,694,706 (including CCSP, CCSU and CCSR(T)). This represents a reduction of 33% in the total value of CCS contracts since 2017/18 and a corresponding increase of 56% in the total value of CCSP contracts in the same period. The decrease in the CCS contract values and in the number of services offering CCS, combined with increases of the same for CCSP, indicates that services are moving away from CCS towards CCSP, which offers them more flexible conditions.

In 2018/19 (between September 2018 and June 2019), 41,708 children benefited from targeted CCS strands, both CCS and CCSP. This is an increase of 15% on the previous year when 36,367 children were supported under CCS and CCSP.

An additional 31,735 children availed of the universal subsidy (CCSU), 15% less than in 2017/18. This reduction is an indirect result of the changes in the ECCE programme rules. Children availing of CCSU move to ECCE once they become eligible. In 2018/19, the entry point for ECCE changed to 2 years 8 months, allowing younger children to avail of ECCE, and thus resulting in smaller numbers availing of CCSU.

A further 527 children were supported under CCSR(T), representing an increase of 19% in the number of children supported under CCSR(T) from 2017/18.

Over half of services (57% or 1,828) who had the CCSP contract had at least one child registered under CCSU. This represents a reduction of 8% since last year.

In 2018/19, 61,109 parents benefited from either CCS, CCSP, CCSU or CCSR(T), a small reduction of 1% on 2017/18 (61,888).

Table 2.3 presents the breakdown of registrations for different strands by provider type. More than half of registrations approved under CCS and CCSP (55%) were made in community services. The majority of registrations for CCSU were made in private services (83%).

Table 2.3 Number of registrations under CCS programmes by organisation type

Programme strand	Community	Community %	Private	Private %	Total
CCS and CCSP	31,696	55%	25,643	45%	**57,339**
CCSU	6,324	17%	30,923	83%	**37,247**
CCSR(T)	313	50%	308	50%	**621**

10 Based on 472 services. Urban/rural classification could not be determined for 4 services which were in contract for 2017/18.

11 Based on 470 services. Level of deprivation could not be determined for 6 services which were in contract for 2017/18.

Table 2.4 presents a breakdown of CCS and CCSP registrations by county. The five counties with the largest share of CCS and CCSP registrations nationally were: Dublin (four local authority areas combined) (17%), Donegal (9%), Limerick (6%), Galway (6%) and Cork City and County combined (5%), which reduced from 7% in 2017/18. Overall, counties with larger population size tended to have the highest numbers of registrations, with a few exceptions. For example, 9% of registrations for CCS and CCSP were in Donegal, however, only 4% of children enrolled were in the same county. This was the opposite for Cork City and County, where only 5% of CCS and CCSP registrations were made, yet 11% of all children were enrolled in this location.

There are significant differences in the distribution of CCS and CCSP registrations at county level (see Table 2.4). The proportion of CCS registrations in all CCS/CCSP registrations has decreased significantly in all counties since 2017/18. Leitrim has the highest proportion of CCS registrations (50%) with Dublin City and Dún Laoghaire-Rathdown following with 42% and 41%, respectively. The county with the lowest proportion of CCS registrations is Kildare (2%) followed by Wicklow (5%) and Donegal (8%). Conversely, the proportion of CCSP registrations in all CCS/CCSP registrations has increased considerably since last year, accounting for more than two thirds of registrations in 25 counties. These differences tend to reflect, at least in part, the proportions of community and private services in each county, as outlined in Section 3.2.

Table 2.4 Number and percentage of CCS and CCSP registrations and number of CCSU registrations by county

County	CCS	CCS (%)	CCSP	CCSP (%)	Total CCS and CCSP	CCSU
Carlow	208	15%	1,199	85%	1,407	378
Cavan	272	22%	967	78%	1,239	614
Clare	361	23%	1,181	77%	1,542	889
Cork City	373	34%	737	66%	1,110	884
Cork County	239	12%	1,766	88%	2,005	3,293
Donegal	401	8%	4,550	92%	4,951	813
Dublin – Dún Laoghaire-Rathdown	170	41%	245	59%	415	2,922
Dublin – Dublin City	2,370	42%	3,328	58%	5,698	4,597
Dublin – Fingal	127	9%	1,274	91%	1,401	3,097
Dublin – South Dublin	530	23%	1,743	77%	2,273	2,540
Galway	738	22%	2,627	78%	3,365	2,439
Kerry	617	23%	2,055	77%	2,672	1,004
Kildare	27	2%	1,133	98%	1,160	1,931
Kilkenny	566	40%	844	60%	1,410	683
Laois	277	15%	1,587	85%	1,864	366
Leitrim	342	50%	336	50%	678	217
Limerick	1,026	29%	2,573	71%	3,599	1,384
Longford	253	23%	841	77%	1,094	229
Louth	386	20%	1,523	80%	1,909	830
Mayo	418	32%	871	68%	1,289	464
Meath	298	20%	1,190	80%	1,488	1,398
Monaghan	266	12%	1,983	88%	2,249	655
Offaly	121	20%	472	80%	593	369
Roscommon	166	19%	705	81%	871	451
Sligo	403	23%	1,38	77%	1,784	630
Tipperary	265	9%	2,531	91%	2,796	1,064
Waterford	505	24%	1,622	76%	2,127	565
Westmeath	454	40%	669	60%	1,123	557
Wexford	439	21%	1,694	79%	2,133	934
Wicklow	56	5%	1,038	95%	1,094	1,050
Total	**12,674**	**22%**	**44,665**	**78%**	**57,339**	**37,247**

There were 181 children registered under CCSR (Resettlement) in 52 separate services and 346 children registered under CCSRT (Transition) across 112 services in the period between September 2018 and June 2019. Children availed of CCSR in 18 out of 30 counties, with the highest number of registrations recorded in Waterford (62) and Donegal (51). The lowest number of CCSR registrations were in Dublin City and Dún Laoghaire-Rathdown – one in each county. Children availed of CCSRT in 14 out of 30 counties. Dublin City has a significantly higher number than other counties (261) compared to the next highest, South Dublin (26).

2.4 Training and Employment Childcare (TEC)[12]

TEC is an overarching programme, specifically designed to support parents/guardians on eligible training and education courses, as well as certain categories of parents/guardians returning to work, by providing subsidised childcare places.

It comprises three strands:

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

In 2018/19, 1,684 services were contracted to offer at least one strand of TEC which represents 37% of all services (4,598), an increase of 2% on the previous year. Over two thirds of these services (68%) were private and 32% were community, the same proportions as last year. See Table 2.5 for full details.

Table 2.5 Number and percentage of services contracted to offer the TEC Programme

	Community		Private			All services with TEC contract	
Programme strand	Number	%	Number	%	Total 2018/19	% of total TEC services	Total 2017/18
ASCC	343	30%	810	70%	1,153	68%	1,213
CEC (AS)	416	35%	758	65%	1,174	70%	1,220
CEC (PS)	414	37%	703	63%	1,117	66%	1,194
CETS	518	32%	1,085	68%	1,603	95%	1,607
Total (offering at least one strand)	**539**	**32%**	**1,145**	**68%**	**1,684**	**100%**	**1,659**

12 Information about these programmes is available on the DCYA website, via the following link: https://www.gov.ie/en/publication/ea9ec3-transitional-rules-for-dcya-targeted-childcare-programmes/

In 2018/19, 2,286 parents/guardians benefitted and 3,320 children participated in TEC programmes. This represents a 25% decline in the numbers of both parents/guardians and children when compared to the 2017/18 programme year. The number of parent/guardians and children benefiting from TEC has been decreasing every year since 2014/15.

Just over half of all TEC registrations were for children availing of CETS (53%), while the smallest proportion of children benefitted from ASCC (6%) – see Table 2.6 for details. There was a decline in registrations for all the TEC strands since 2017/18. The overall reduction across all TEC programmes was 24%. The number of TEC registrations has been decreasing on an annual basis since 2014/15. This decline is likely to be underlined by a number of factors. For example, as there is a lot of crossover in eligibility between TEC and CCSP, some services may choose to register children under CCSP rather than TEC. The largest decline in registrations since last year was recorded for ASCC, at 32%. This may be because funding under this programme strand is available for a maximum of 52 weeks per parent. A large number of parents have now reached their maximum allowance and are required to register under CCSP to avail of subventions.

Table 2.6 presents the number and percentage of TEC registrations at county level. The share of registrations for different strands of TEC varies significantly between counties. In 25 out of 30 counties, ASCC accounts for 10% or less of all TEC registrations, with the notable exception of Dún Laoghaire-Rathdown, where ASCC accounted for 54% of all TEC registrations (please note that there were only 35 TEC registrations in total in this county). In 17 out of 30 counties, CETS accounts for at least half of all TEC registrations with the percentage being as high as 78% in Fingal and South Dublin. CEC registration figures also vary significantly between counties from 45% in Louth to 3% in Dún Laoghaire-Rathdown for CEC (AS) and from 42% in Mayo to 9% in both Dún Laoghaire-Rathdown and Leitrim for CEC (PS).

Table 2.6 Number and percentage of TEC programme registrations by county

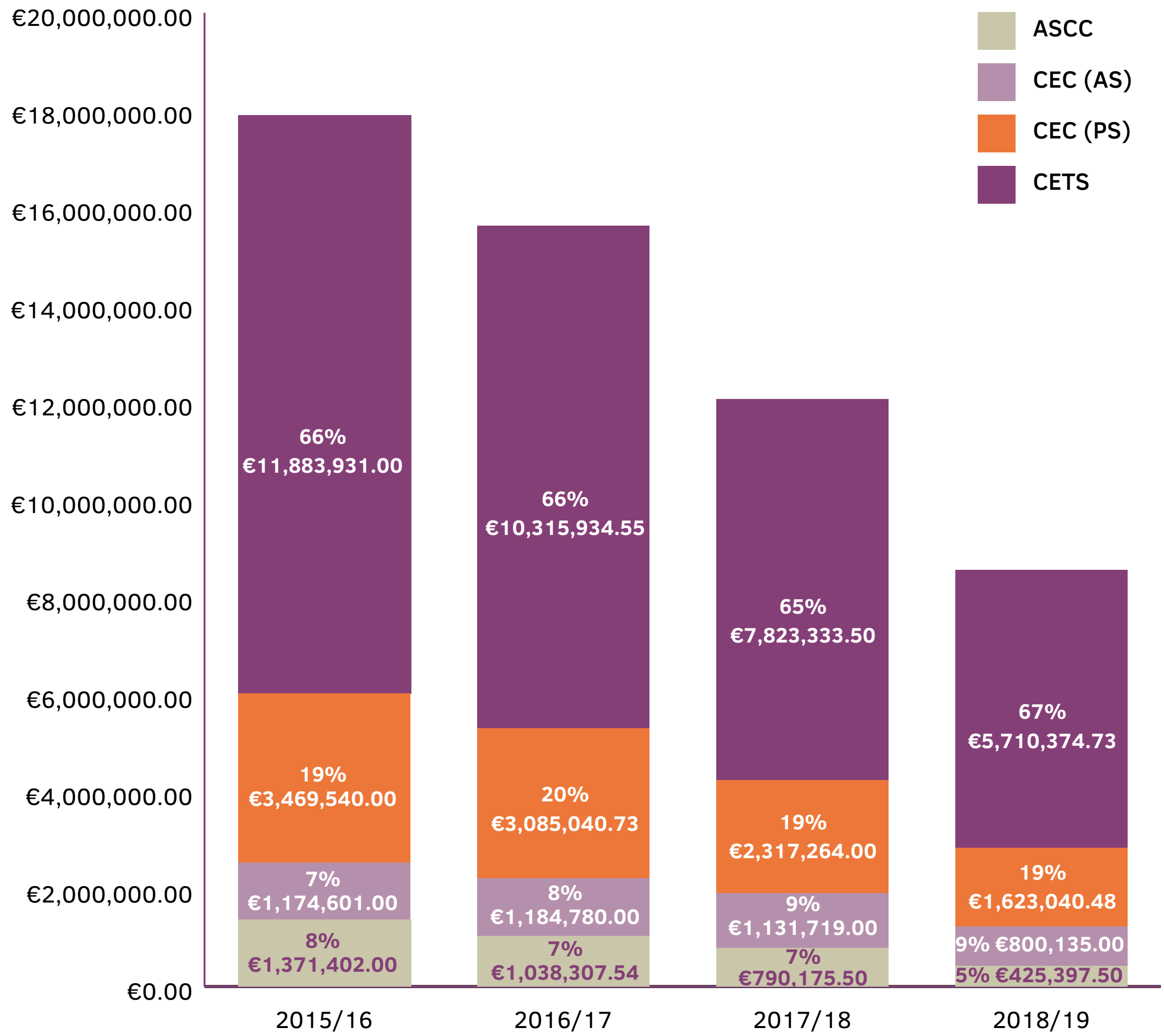
County	ASCC	ASCC %	CEC (AS)	CEC (AS) %	CEC (PS)	CEC (PS) %	CETS	CETS %	Total TEC registrations
Carlow	0	0%	24	41%	7	12%	28	47%	59
Cavan	11	9%	29	24%	33	27%	49	40%	122
Clare	1	1%	33	37%	15	17%	41	46%	90
Cork City	3	4%	9	12%	16	22%	46	62%	74
Cork County	16	10%	16	10%	34	21%	99	60%	165
Donegal	12	6%	52	25%	25	12%	120	57%	209
Dublin – Dublin City	17	7%	23	9%	59	23%	155	61%	254
Dublin – Dún Laoghaire-Rathdown	19	54%	1	3%	3	9%	12	34%	35
Dublin – Fingal	15	5%	21	7%	30	10%	238	78%	304
Dublin – South Dublin	13	6%	12	5%	23	10%	175	78%	223
Galway	12	7%	25	14%	23	13%	115	66%	175
Kerry	4	2%	72	40%	49	27%	54	30%	179
Kildare	6	3%	32	17%	22	12%	129	68%	189
Kilkenny	8	11%	17	22%	12	16%	39	51%	76
Laois	1	1%	17	16%	17	16%	70	67%	105
Leitrim	3	7%	7	15%	4	9%	32	70%	46
Limerick	3	2%	25	15%	16	10%	123	74%	167
Longford	8	9%	16	18%	25	28%	40	45%	89
Louth	5	3%	76	45%	59	35%	29	17%	169
Mayo	8	9%	21	24%	37	42%	23	26%	89
Meath	2	1%	52	35%	15	10%	81	54%	150
Monaghan	4	2%	78	38%	80	38%	46	22%	208
Offaly	20	30%	17	25%	11	16%	19	28%	67
Roscommon	6	8%	13	16%	15	19%	45	57%	79
Sligo	13	17%	20	26%	14	18%	29	38%	76
Tipperary	2	1%	32	23%	37	26%	70	50%	141
Waterford	9	5%	23	12%	24	13%	132	70%	188
Westmeath	38	23%	59	36%	26	16%	42	25%	165
Wexford	5	3%	35	24%	48	33%	56	39%	144
Wicklow	0	0%	17	20%	18	22%	48	58%	83
Total	**264**	**6%**	**874**	**21%**	**797**	**19%**	**2,185**	**53%**	**4,120**

The total value of approved TEC contracts in 2018/19 was €8,558,948. This represents a decline of 29% relative to the previous programme year and a continuation of the trend which saw a decrease of 23% between 2016/17 and 2017/18.

The average subventions (per child) were as follows: ASCC €1,899; CEC (AS) €1,280; CEC (PS) €2,614; and CETS €3,041.

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

Figure 2.3 TEC programme funding by programme strand between 2015/16 and 2018/19



2.5 Early Learning and Care and School-Age Childcare Capital Programme

As outlined in Section 1.2.4, capital funding is provided by the DCYA to support infrastructural improvements to ELC and SAC facilities. During 2019, 238 funding applications were approved to a total value of €6,255,964 under this programme and 220 ELC and SAC services were approved for funding in 2019.

The majority of the funds (60%) were approved under ELCC Strand A with 35% approved under SACC Strand C and 5% under ELCC Strand B – for details see Figure 2.4.

Figure 2.4 Funding amount and number of ELCC and SACC applications by strand

Just under half of the applications approved (118) were for funding under SACC Strand C, however, these accounted for only 35% of funding approved. ELCC (Strands A and B) projects accounted for the remaining half of approved applications and 65% of funding approved (Figure 2.4). Table 2.7 presents the percentage of services approved for funding at county level. The percentage of providers approved for ELCC/SACC funding in each county ranges from 17% in Longford to 2% in Dún Laoghaire-Rathdown, Cork City and Wicklow. Dublin City and Galway had the highest percentage of total funding approved (9%). The lowest percentage of approved capital funding was in Leitrim, Dún Laoghaire-Rathdown, Cavan and Carlow, each with 1% of total funding approved.

Table 2.7 Number and percentage of ELCC and SACC approved applications and funding amounts by county

County	No. of services approved ELCC and/or SACC funding	No. of services with approved ELCC/SACC funding as a % of total submitted	Total no. of services in county	% of services approved ELCC/SACC funding	Total funding approved	% of total funding
Galway	20	61%	288	7%	€564,871	9%
Dublin – Dublin City	15	75%	445	3%	€548,875	9%
Westmeath	8	80%	89	9%	€368,337	6%
Donegal	9	53%	154	6%	€329,591	5%
Dublin – South Dublin	9	90%	255	4%	€290,434	5%
Dublin – Fingal	10	71%	326	3%	€283,811	5%
Mayo	11	85%	136	8%	€272,045	4%
Meath	8	53%	196	4%	€244,673	4%
Kildare	8	80%	201	4%	€231,055	4%
Wexford	8	73%	146	5%	€227,635	4%
Kilkenny	8	73%	100	8%	€220,427	4%
Waterford	6	100%	96	6%	€215,015	3%
Cork County	11	55%	388	3%	€212,830	3%
Limerick	9	75%	201	4%	€185,911	3%
Kerry	7	64%	138	5%	€185,659	3%
Offaly	6	100%	71	8%	€182,166	3%
Longford	6	100%	36	17%	€180,875	3%
Tipperary	8	57%	180	4%	€169,043	3%
Louth	6	67%	120	5%	€162,592	3%
Sligo	8	57%	76	11%	€ 136,277	2%
Monaghan	7	88%	61	11%	€135,380	2%
Wicklow	4	67%	176	2%	€ 130,995	2%
Laois	6	75%	85	7%	€128,725	2%
Cork City	2	40%	95	2%	€120,000	2%
Clare	5	63%	138	4%	€114,868	2%
Roscommon	3	60%	58	5%	€ 94,809	2%
Carlow	3	100%	54	6%	€90,000	1%
Cavan	2	40%	67	3%	€90,000	1%
Dublin – Dún Laoghaire-Rathdown	4	57%	185	2%	€71,360	1%
Leitrim	3	75%	37	8%	€ 67,705	1%
Total	**208**	**69%**	**4,598**	**5%**	**€6,255,964**	**100%**

2.6 Access and Inclusion Model (AIM)

The Access and Inclusion Model (AIM) is a model of supports designed to ensure that children with disabilities can access the ECCE programme. Its goal is to empower service providers to deliver an inclusive pre-school experience, ensuring that every eligible child can meaningfully participate in ECCE, and benefit from the high quality pre-school education.

AIM is a child-centred model, involving seven levels of progressive support, moving from the universal to the targeted, based on the needs of each child. AIM seeks to offer tailored, practical supports based on need, and does not require a formal diagnosis of disability[13]. AIM provides a suite of universal and targeted supports across seven levels, as shown in Figure 2.5.

Figure 2.5 Model to support access to the ECCE programme for children with a disability

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

Under Level 3, between September 2018 and July 2019, Better Start delivered 39 Hanen courses to 741 participants from 490 services and 39 Lámh courses to 459 participants from 305 services.

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

Apart from Level 7, AIM supports are delivered all year round, and are not linked to a particular programme call. The data provided here represents a snapshot taken on 16th September 2019 and captures applications with a planned start date on or after 27th August 2018 and on or before 26th August 2019 (programme call AIM 2018/19). Note: comparisons with last year use data taken at the end of the programme call 2017/18 (September 2018) and not data reported in the sector profile 2017/18, which used a snap shot taken in June 2018.

In 2018/19, 2,388 services were supported under the Access and Inclusion Model, in respect of 5,513 children. Relative to the previous year[14], there was a 22% increase in the number of services receiving support under AIM and an increase of 34% in the number of children[15] receiving support.

In 2018/19, 2,036 services received Level 4 supports where early years specialists provided on-site mentoring to ECCE service providers and supported both services and parents to access additional resources. 302 services received Level 5 supports, which comprise access to specialist equipment (291 services received specialist equipment) and/or funding for alterations to buildings (48 services received funding for alterations to buildings). There is a separate application process for Level 5 funding and the same service can receive funding for both equipment and alterations.

In 2018/19, 1,978 services were in receipt of Level 7 supports, which provides funding for staff for an additional 10 or 15 hours a week. This is to enable services to reduce the staff-to-child ratio in an ECCE setting and there is flexibility around how services decide to do this (e.g. by employing an additional staff member or reducing the number of children registered for ECCE in a room).

The number of services receiving Level 7 support increased by nearly a third (28% increase) compared to last year, when 1,541 services were assisted. This increase can be linked to the greater number of services engaging with AIM as well as a greater number of children with disabilities accessing supports.

818 services in receipt of Level 7 support had a child entering their second year of ECCE, and would therefore be in their second year of receiving support for the same child.

The vast majority of approved Level 7 applications (97%) are for 15 hours of support a week. However, 1,260 (33%) of applications approved for 15 hours a week shared the resource (i.e. more than one child would receive additional support from the same resource). Table 2.8 shows the number of services in receipt of support at Levels 4, 5 and 7 broken down by county[16].

14 Under the 2017/18 programme call 1,956 services were supported under AIM.
15 Under the 2017/18 programme call 4,107 children were supported under AIM.
16 Some services have received funding for both Level 5 alterations and Level 5 equipment and some services have received funding for only one of these categories. Some services have received Level 5 funding but not Level 4 or 7, therefore the totals for each column from Level 4 through to Level 7 do not correspond.

Table 2.8 Number of services providing AIM by county and level

County	Level 4	Level 5 Alterations	Level 5 Equipment	Level 7	Number of services receiving AIM support by county	% of services in each county in receipt of AIM support	% of services in each county in receipt of AIM Level 7 support
Carlow	31	0	8	29	33	61%	54%
Cavan	30	2	5	31	35	52%	46%
Clare	65	5	14	63	75	54%	46%
Cork City	51	1	12	49	59	62%	52%
Cork County	208	10	32	205	238	61%	53%
Donegal	72	4	11	69	86	56%	45%
Dublin – Dublin City	159	0	7	147	189	42%	33%
Dublin – Dún Laoghaire-Rathdown	62	0	16	51	73	39%	28%
Dublin – Fingal	134	2	1	143	164	50%	44%
Dublin – South Dublin	125	1	4	117	143	56%	46%
Galway	104	3	15	98	127	44%	34%
Kerry	68	5	15	72	81	59%	52%
Kildare	87	1	6	81	100	50%	40%
Kilkenny	36	1	7	38	44	44%	38%
Laois	47	2	8	44	52	61%	52%
Leitrim	13	0	3	14	18	49%	38%
Limerick	89	1	11	91	103	51%	45%
Longford	17	0	3	13	20	56%	36%
Louth	72	0	12	69	79	66%	58%
Mayo	59	2	18	61	75	55%	45%
Meath	98	0	19	94	109	56%	48%
Monaghan	24	0	1	22	29	48%	36%
Offaly	40	0	4	39	44	62%	55%
Roscommon	30	0	5	25	34	59%	43%
Sligo	18	0	4	21	24	32%	28%
Tipperary	84	4	18	84	98	54%	47%
Waterford	46	2	5	43	51	53%	45%
Westmeath	44	1	9	41	49	55%	46%
Wexford	66	1	2	72	87	60%	49%
Wicklow	57	0	16	52	69	39%	30%
Total	**2,036**	**48**	**291**	**1,978**	**2,388**	**58%**	**48%**

In 2018/19, 3,981 children received Level 4 support, an increase of 26% on the previous year. Of these, 2,562 (64%) progressed to also receive Level 7 support. With an additional 1,138 children accessing Level 7 supports for their second year in ECCE, the total number of children accessing Level 7 supports in 2018/19 was 3,910 (with 210 children receiving Level 4 support in an earlier programme to their initial Level 7 application). **They represented 3.33% of all children availing of ECCE. In comparison, in 2017/18, 2.15% of children accessing ECCE received AIM Level 7 support.**

2.7 Programmes – summary

Over the entire programme year, **nine in every ten children** (185,971) **participated in at least one of the DCYA funded programmes** (ECCE, CCS (including CCSP, CCSU and CCSR(T)) or TEC) (181,329 between September 2018 and June 2019). This represents an increase of 391 children (0.2%) on the previous year and shows that the vast majority of children attending ELC and SAC services are availing of government supports. The remaining 10% of children are school-age children not eligible to be supported under targeted schemes (CCS/CCSP or TEC). All pre-school children, aged under 6 years, are eligible for supports under the universal government schemes (ECCE or CCSU).

CCS/CCSP recorded a 17% increase on the previous year in the number of children availing of the programme, which was accompanied by a 23% increase in the total value of approved registrations. The schemes that recorded reductions were TEC, CCSU and ECCE. The reductions in the number of children availing of CCSU (14%) and ECCE (9%) were primarily a result of the ECCE programme rules changes (for details see sections 2.2 and 2.3). For these two programmes, the overall investment (measured here as approved registrations value) increased on the previous year, by 11% for ECCE and 3% for CCSU. The increase in value of ECCE registrations is a result of an increase in the capitation rates, the growth in the number of services receiving the higher capitation rate and children availing of the programme over a longer period. The increase in the approved value of registrations for CCSU is a result of children availing of the programme for longer during the programme year. During 2018/19, children availing of CCSU benefitted from the programme, on average 34.1 weeks per child compared to 29.4 weeks in 2017/2018.

TEC recorded a 25% reduction in the number of children and a 26% decrease in the approved registration value comparing to the previous year. This is a continuation of the trend experienced by TEC over the last three years. This may be due to a number different factors, including that parents may be choosing to avail of CCSP instead of TEC, if eligible for both programmes, as well as the reduction in the number of parents eligible for ASCC due to reaching the maximum number of weeks under the programme.

Table 2.9 presents the changes over the last three years for each programme in regard to the number of children supported, number of registrations and funding levels for the period between September 2018 and June 2019. The detailed analysis in this chapter was based on the figures for this period. Please note it is difficult to make direct comparisons across years due to changing programme rules. Table 2.10 presents the same figures but for the entire programme year 2018/19.

Table 2.9 Number of children, registrations and approved registration value for ECCE, CCS/CCSP, CCSU and TEC from September 2018 to June 2019

	Programme	2016/17	2017/18	2018/19	Change 2017/18 to 2018/19	
					Actual	% change
Number of children	ECCE	120,601	118,673	108,137	-10,536	-9%
	CCS/CCSP	24,715	36,367	41,708	5,341	15%
	CCSU*	N/a	37,393	31,735	-5,658	-15%
	TEC	5,931	4,421	3,320	-1,101	-25%
	Total children	**147,514**	**181,123**	**181,329**	**206**	**0.1%**
Number of registrations	ECCE	127,637	125,794	117,367	-8,427	-7%
	CCS/CCSP	25,530	40,673	57,339	16,666	41%
	CCSU*	N/a*	42,587	37,247	-5,340	-13%
	TEC	7,344	5,423	4,120	-1,303	-24%
	Total registrations	**160,511**	**214,477**	**216,073**	**1,596**	**1%**
Approved registration value	ECCE	€244,860,861	€241,957,446	€267,478,075	€25,520,629	11%
	CCS/CCSP	€38,870,494	€91,902,008	€112,106,688	€20,204,680	22%
	CCSU*	N/a*	€18,287,062.40	€18,832,334	€545,272	3%
	TEC	€15,600,764	€11,545,325	€8,555,426	-€2,989,899	-26%
	Total registration value	**€299,332,119**	**€363,691,841**	**€406,972,523**	**€43,280,682**	**12%**

* CCSU first opened for registrations in the 2017/18 period so there is no comparative data from 2016/17

Table 2.10 Number of children, registrations and approved registration value for ECCE, CCS/CCSP, CCSU, CCSR(T) and TEC for the entire programme year 2018/19

	Programme	2014/15	2015/16	2016/17	2017/18	2018/19	Annual difference 2017/18 & 2018/19
Number of children	ECCE	66,761	74,108	120,821	118,899	108,204	-10,695
	CCS/CCSP	23,716	25,832	27,150	38,846	45,594	6,748
	CCSU*	N/a	N/a	N/a	39,319	33,743	-5,576
	CCSR(T)**	N/a	N/a	N/a	560	610	50
	TEC	6,814	7,068	6,350	4,655	3,474	-1,181
	Total children	**N/a**	**N/a**	**149,426**	**185,580**	**185,971**	**391**
Number of registrations	ECCE	68,333	77,414	128,299	126,431	118,225	-8,206
	CCS/ CCSP	23,775	26,374	29,156	47,666	68,925	21,259
	CCSU*	N/a	N/a	N/a	46,106	41,217	-4,889
	CCSR(T)**	N/a	N/a	N/a	685	723	38
	TEC	8,171	9,277	8,320	6,011	4,519	-1,492
	Total registrations	**N/a**	**N/a**	**165,775**	**226,899**	**233,609**	**6,710**
Approved registration value	ECCE	€138,959,130	€178,054,067	€273,753,848	€242,015,900	€267,582,672	€25,566,772
	CCS/CCSP	€39,700,820.00	€39,675,222.00	€42,639,511.00	€92,459,722.90	€114,002,199	€21,542,476
	CCSU*	N/a	N/a	N/a	€18,439,956.30	€18,965,743	€525,787
	CCSR(T)**	N/a	N/a	N/a	€1,929396.06	€2,468,439	€539,043
	TEC	€18,416,268.00	€18,676,285.00	€16,822,504.00	€11,817,424.50	€8,735,485	-€3,081,940
	Total registration value	**N/a**	**N/a**	**€333,215,863.00**	**€366,662,399.94**	**€411,754,539**	**€45,092,139**

* CCSU first opened for registrations in the 2017/18 period so there is no comparative data from previous years.
** CCSR(T) first opened for registrations in the 2017/18 period so there is no comparative data from previous years. CCSR(T) figures are separated from CCSP figures for the entire Programme year 2017/18 and 2018/19. However, these figures are not available for the snapshot period from September 2018 to June 2019.

3 Profile of Early Learning and Care and School-Age Childcare services

Profile of Early Learning and Care and School-Age Childcare services

27%

of ELC and SAC providers offered transport services

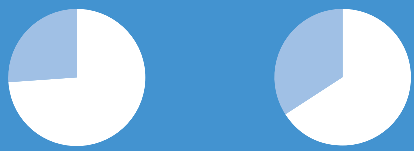
4,598

services contracted to provide at least one of the DCYA funded programmes –

92% offered **ECCE**

70% offered **CCS/CCSP**

37% offered **TEC**



74%

of services are private

66%

are in urban areas

7%

the number of services located in disadvantaged areas

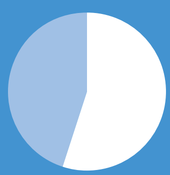
373

the number of services offering ELC and SAC through the medium of Irish (**10%** of all services)

3 in 10

services were billed commercial rates averaging

€4,785



55%

of services had a capacity of up to

40 places

3.1 Introduction

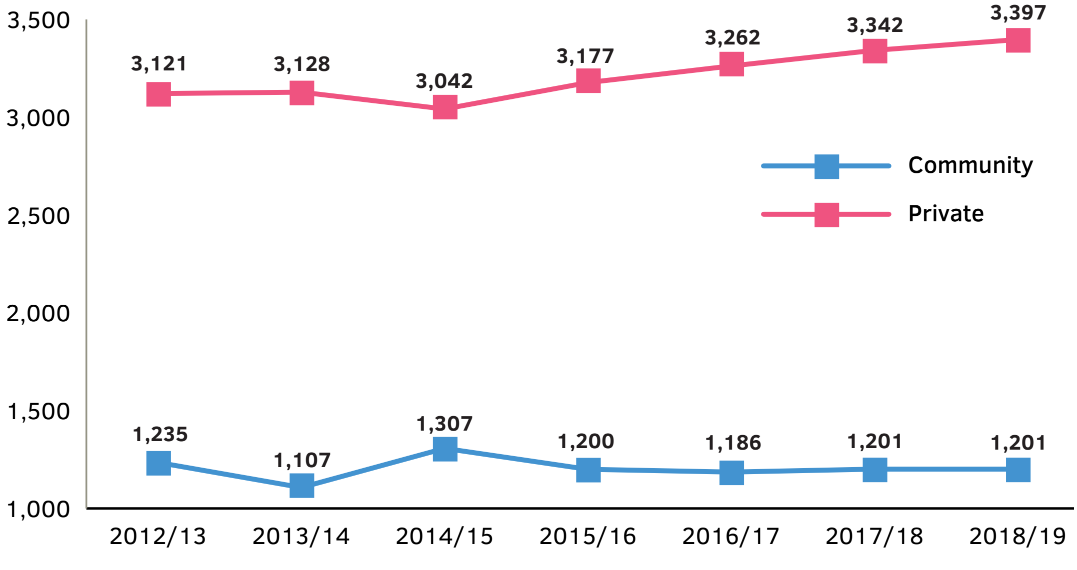
This chapter provides an overview of the main characteristics of Early Learning and Care (ELC) and School-Age Childcare (SAC) services. These include the organisation type, geographical location, participation in funding programmes, types of provision, premises ownership, location of premises, payment of commercial rates, provision of education through Irish and other. The two data sources underlying the analysis in this chapter are the Programmes Implementation Platform (PIP), which includes all services contracted to deliver DCYA programmes, and the service profile survey completed by 85% of services.

In 2018/19, 4,598 services were contracted to provide at least one of the three DCYA funding programmes, namely Early Childhood Care and Education (ECCE), Community Childcare Subvention (including CCS, CCSU, CCSPlus and CCSR(T)) and/or Training and Employment Childcare (TEC). Compared to 2017/18, 55 more services (1%) were contracted to deliver these programmes.

3.2 Types of service and geographical distribution

In Ireland, the majority of ELC and SAC services are operated by private (for-profit) organisations. In 2018/19 private services accounted for 74% (3,397) of all services contracted to provide at least one of the three funding programmes, with community services accounting for the remaining 26% (1,201). Over recent years, there has been a slight increase in the number of private services while the number of community services has remained relatively constant, as shown in Figure 3.1.

Figure 3.1 Number of ELC and SAC services by organisation type 2012/13 – 2018/19



Two thirds of services (66% or 3,013) were located in urban areas and 34% (1,585) in rural areas. Table 3.1 shows the overall urban/rural distribution of community and private services over the last four years. There has been a decline in the proportion of services located in rural areas, from 39% in 2015/16 to 34% in 2018/19. Services in urban areas are more likely to be private with 77% of urban services being private compared to 68%[17] in rural areas.

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

	2015/16		2016/17		2017/18		2018/19	
	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural
All services	61%	39%	60%	40%	66%	34%	66%	34%
Private	64%	36%	63%	37%	69%	31%	68%	32%
Community	52%	48%	52%	48%	58%	42%	58%	42%

The Pobal Haase-Pratschke Deprivation Index provides a method of measuring the relative affluence or disadvantage of a particular geographical area using data compiled from the national Census. The index uses information, such as unemployment, educational attainment and population change to calculate an affluence/deprivation score of an area. Scores are grouped into eight categories, from 'extremely disadvantaged' to 'extremely affluent'. The location of each ELC and SAC service was assigned the HP Index score based on the Electoral Division (ED). Figure 3.2 shows the number of services by the level of disadvantage of the area where the service is located.

The vast majority of services were located in areas classified as either marginally above or below average (85%). In comparison, 73% of Ireland's population lives in these areas. Community services are more likely to be located in less affluent areas compared to their private counterparts. The number of community services, located in marginally below average areas (630), is almost twice the number located in areas that are marginally above average (332). Only 3% of community services were located in affluent areas compared to 11% of private services. These proportions were reversed in disadvantaged areas, where 14% of community services were located compared to 4% of private ones.

Of the 22 services that were operating in very and extremely disadvantaged areas, the vast majority were community (21). Only 0.5% of all services were located in very and extremely disadvantaged areas, although 2.9% of the population reside in these locations.

17 There are 1,585 services in rural areas, of which 1,075 are private and 510 are community services. There are 3,013 services in urban areas, of which 2,322 are private and 691 are community services.

Figure 3.2 Number of services by the level of disadvantage of the area where the service is located[18]

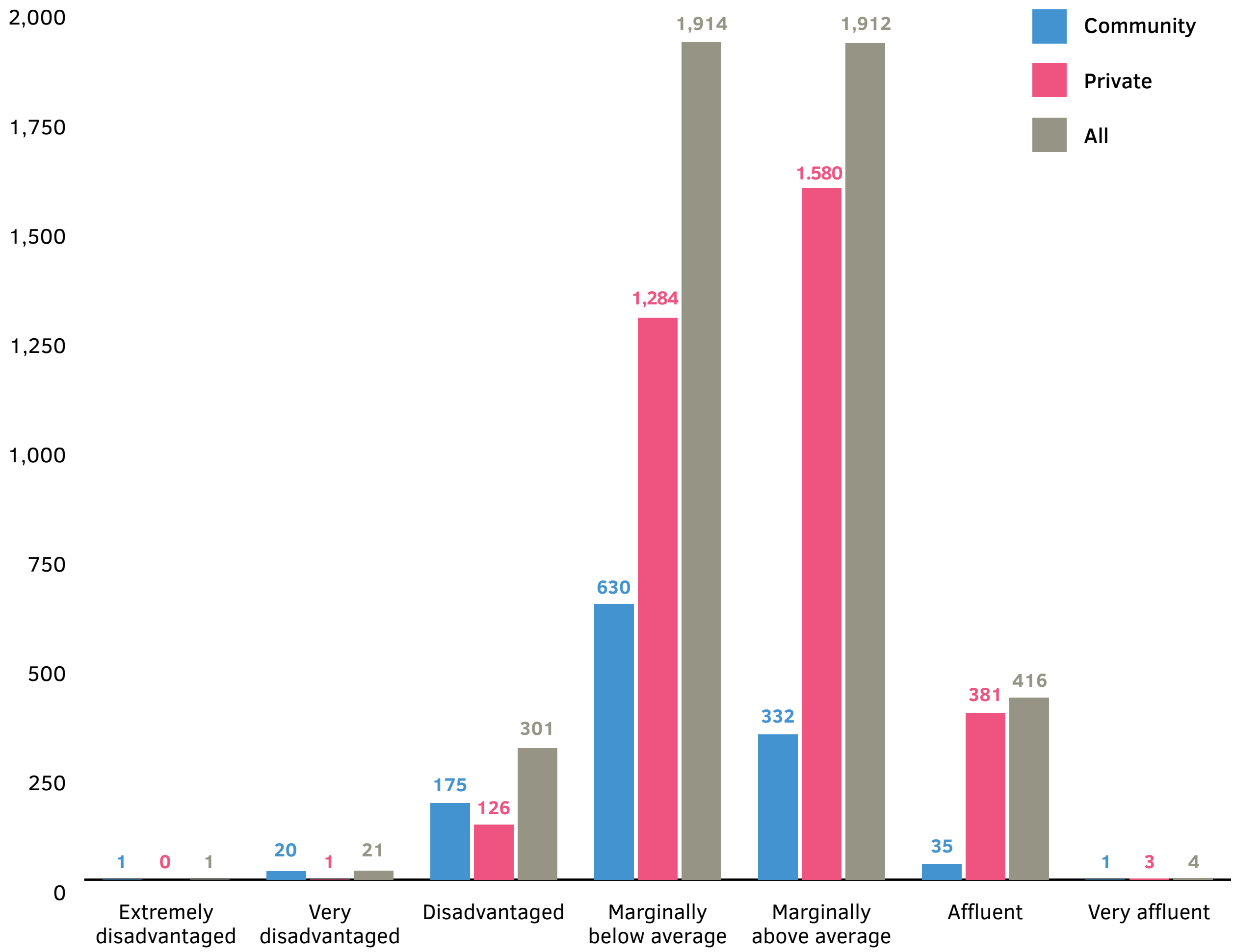
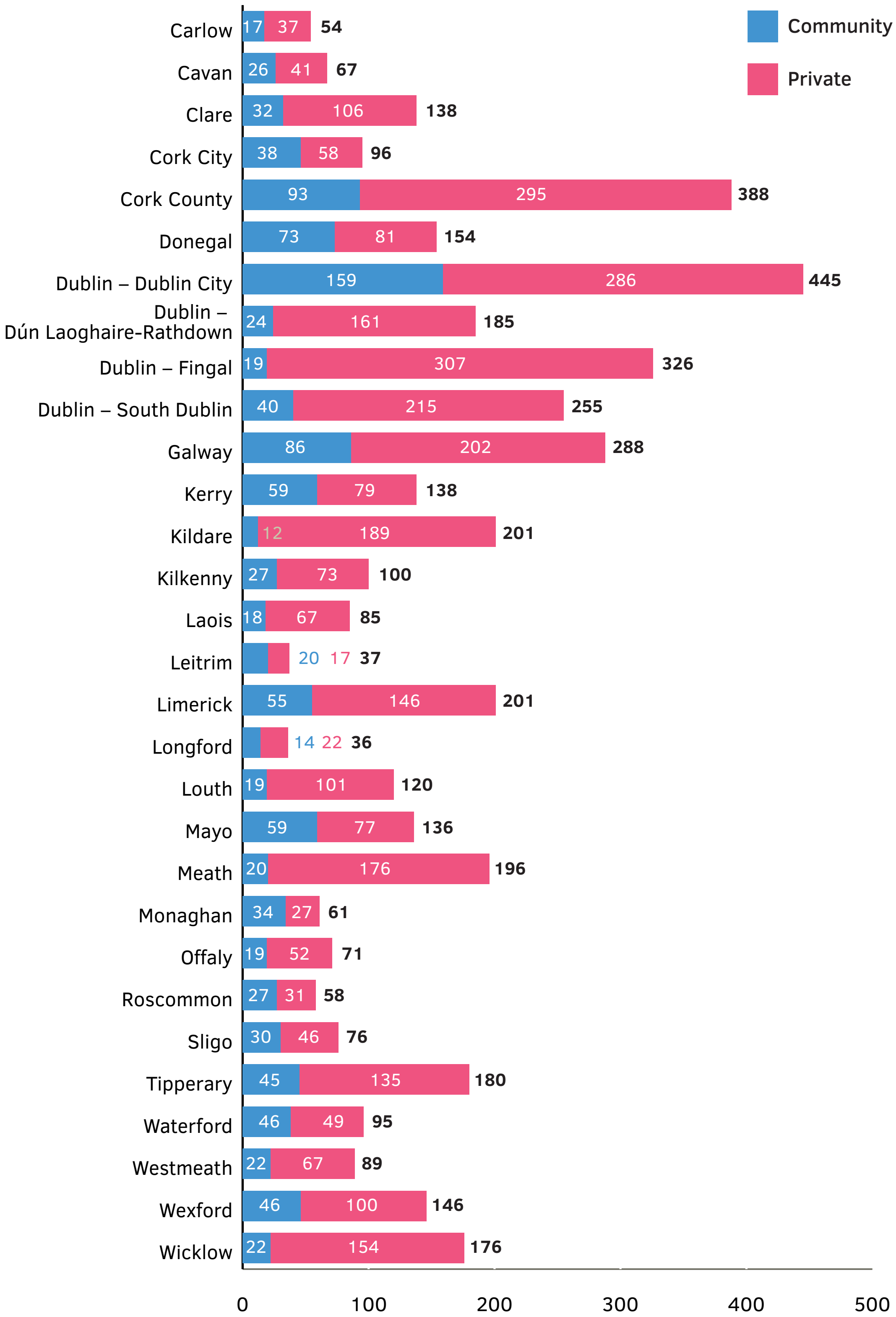


Figure 3.3 presents the county breakdown of services by organisation type, including the total number of services in a county. The ratio of community to private service providers varies significantly between counties. Similar to 2017/18, the counties with the highest proportions of community services are Monaghan (56%), Leitrim (54%), Cork City (48%) and Donegal (47%). The counties with the lowest proportion of community services are generally located in Dublin and the Mid-Eastern Region: Fingal (6%), Kildare (6%), Meath (10%), Dún Laoghaire-Rathdown (13%), Wicklow (13%), South Dublin (16%), and Louth (16%). This geographical pattern is similar to that recorded in 2017/18.

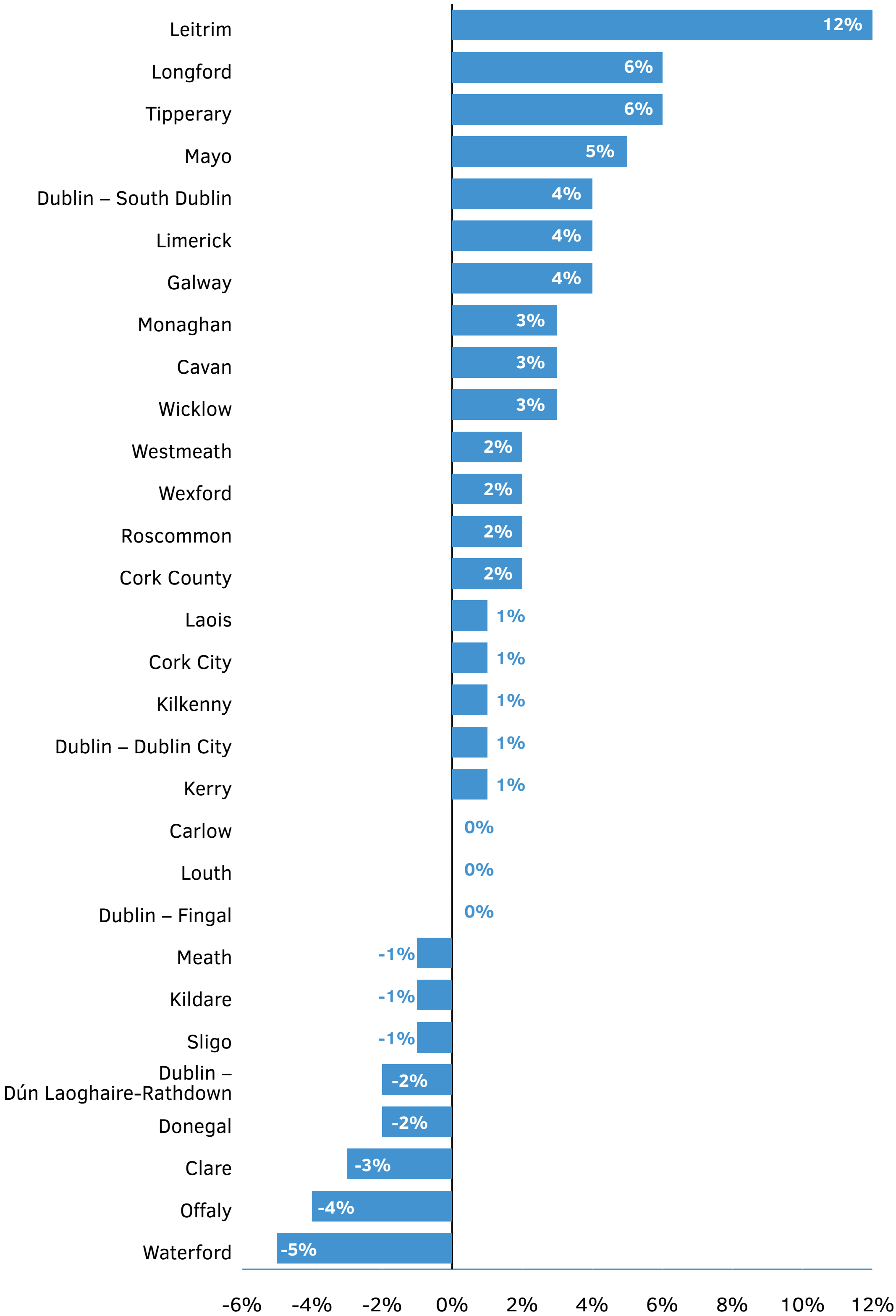
18 Figure 3.2 is based on 4,569 services, as the level of disadvantage could not be established for 29 services who were in contract for 2018/19. No ELC/SAC services were reported in areas classified as extremely affluent so this category has been omitted from the chart.

Figure 3.3 Number of services by county and organisation type



As noted in this chapter's introduction, there has been an overall national increase of 1% in the number of services compared to the previous year. Figure 3.4 presents the changes in the number of services at county level between 2017/18 and 2018/19. The highest relative increase in the number of services in percentage terms was observed in Leitrim (12%), with four additional services opening there bringing the total to 37. The number of services in counties Longford and Tipperary increased by 6% and in Mayo by 5%, while an increase of 4% was recorded in South Dublin, Limerick and Galway. In the four Dublin local authority areas, 13 additional new services opened in total, of which nine are in South Dublin and four are in Dublin City. Both Fingal and Dún Laoghaire-Rathdown recorded a reduction in the number of services of one and three services, respectively. In addition, in seven counties a decline in the number of services was recorded: Waterford (5), Clare (4), Donegal (3), Dún Laoghaire-Rathdown (3), Offaly (3), Kildare (2), Fingal (1), Meath (1) and Sligo (1). The number of services in two counties, Carlow and Louth, remained the same.

Figure 3.4 Percentage change in the number of ELC and SAC services by county from 2017/18 to 2018/19



3.3 Funding programmes

ELC and SAC services can be contracted to offer up to three funding programmes in a given programme year. ECCE has the highest level of uptake, with 92% of services offering it (4,227). For comparison, in 2017/18, 15 more services offered ECCE (93% of all services). The number of services offering TEC remained unchanged from last year, at 37%, and is broadly in line with previous years – 36% in 2016/17 and 2015/16.

The number of services offering either CCS or CCSP has reduced by 5% or 200 services, since last year (75%). However, since 2016/17, there has been a large increase in the number of services offering either of these programmes, from 39% in 2016/17 to 70% this year. This increase can be associated with the expansion of CCS/CCSP and the introduction of CCSU[19] (see section 2.3 for more details).

Table 3.2 provides a breakdown of services by funding programme in 2018/19 and by organisation type. A higher proportion of private services offer ECCE (95%) compared to 84% of community services, while community services are more likely to offer CCS/CCSP and TEC.

Table 3.2 Number and percentage of services by funding programme

Funding programme	Community	Community % (1,201)	Private	Private % (3,397)	Total no. of services	% of all services participating (4,598)
ECCE	1,013	84%	3,214	95%	4,227	92%
CCS/CCSP	1,057	88%	2,160	64%	3,217	70%
TEC	539	45%	1,145	34%	1,684	37%

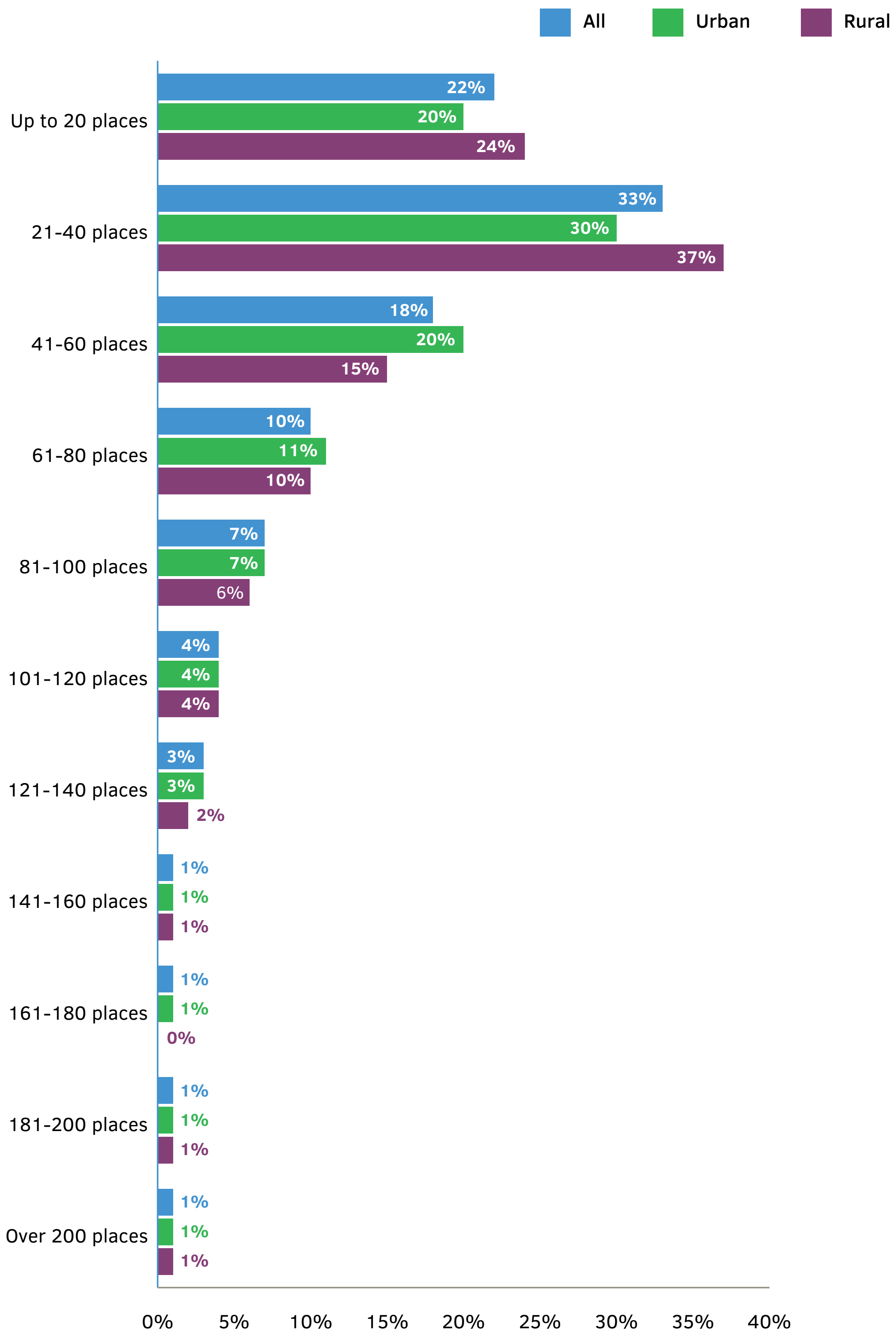
3.4 Size of ELC and SAC services

The majority of services that responded to the survey (2,076 or 55%) had a capacity of up to 40 places in their service (sum of children enrolled and vacant places). One in ten services (395) had a capacity to cater for more than 100 children (see Figure 3.5). The largest service, with capacity of 453 places was located in Dún Laoghaire-Rathdown, while the smallest was in Limerick, with a reported capacity of 3.

Services located in rural areas were smaller. 61% of services in rural areas catered for 40 children or less compared to 50% in urban locations. Of the 395 services catering for over 100 children, 72% were located in urban areas and 28% in rural locations. In comparison, 65% of services who responded to the survey were located in urban areas (2,493) and 35% in rural locations (1,328).

19 The CCSPlus contract entitles services to offer CCSP, CCSU and CCSR(T).

Figure 3.5 Size of services by number of places (children enrolled + vacant places)



3.5 Types of childcare

This section is based on an analysis of data from the service profile survey. Services were presented with the following list of service type options and asked to self-select the service(s) they offered: drop-in; breakfast club; sessional a.m.; sessional p.m.; part-time care; full day care; and school-age childcare (after-school). The most common type of service offered is sessional a.m., with 88% of services offering this type of care.

Compared to 2017/18, the proportion of services offering different types of provision remains very similar (all are within 2% of last year's figures). There were 1% less services offering both sessional a.m. and sessional p.m. care, while 2% more services offer school-age childcare (after-school). For a detailed breakdown of provision by service type offered, see Figure 3.6.

Figure 3.6 Number and percentage of services by service type offered

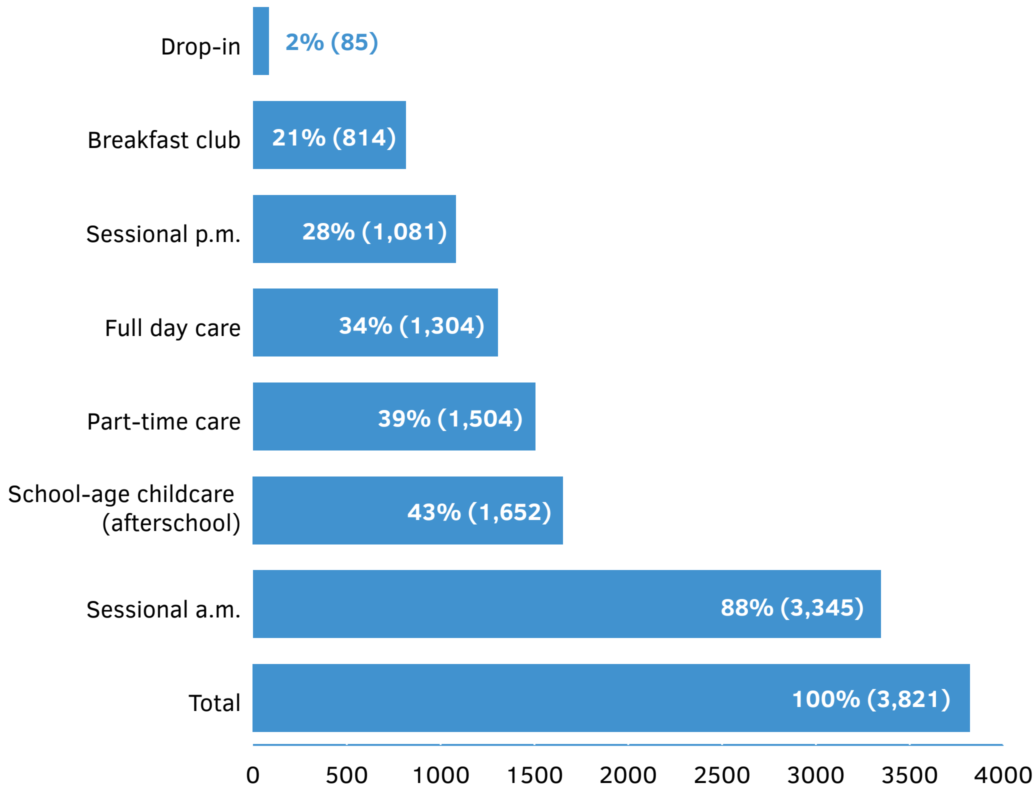
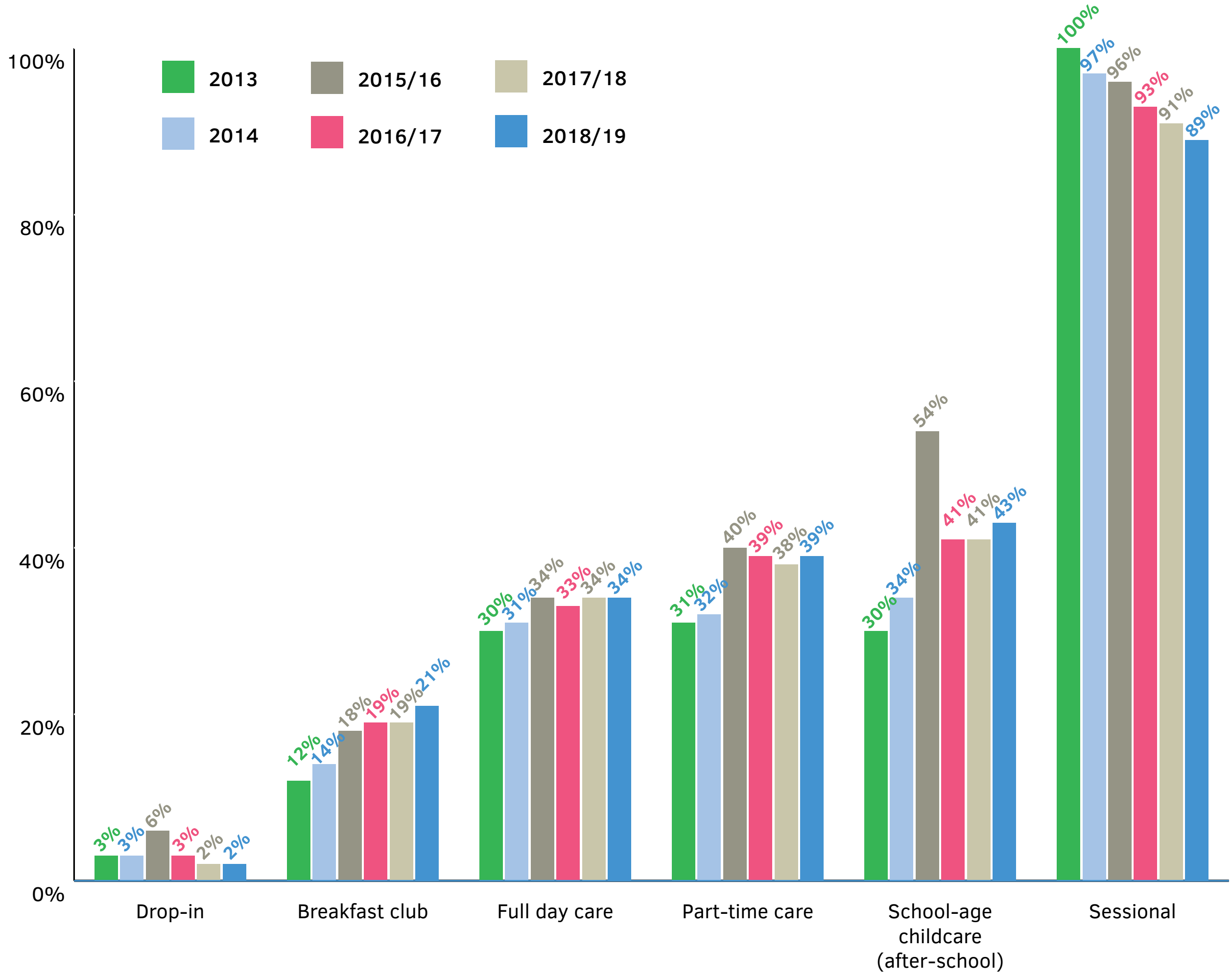


Figure 3.7 shows the changes over time in the type of service offered. Sessional services remain the single most commonly offered form of childcare. There has been growth, over time, in the provision of breakfast clubs and school-age childcare, while the levels of provision in respect of other forms of childcare have remained fairly constant.

Figure 3.7 Changes over time in the service type offered, between 2013 and 2018/19



Out of 3,821 survey respondents, 1,649 (43%) indicated that they provided in term school-age childcare, while one third (1,246) reported offering out of term school-age childcare. Just over half of all community services offer school-age childcare in term compared to 40% of private services. The number of providers offering in term school-age childcare is slightly higher in rural areas (47%) than in urban locations (41%). 37% of community providers offer school-age childcare out of term in comparison to 31% of private providers, while 34% of providers located in urban areas provide this service compared to 31% in rural areas. 90 providers offered school-age childcare only and no other service types.

Table 3.3 Percentage of services offering school-age childcare by type of provider and urban/rural location

	Community (1,029)	Private (2,792)	Urban (2,493)	Rural (1,328)	All (3,821)
% of services offering school-age childcare in term	52%	40%	41%	47%	43%
% of services offering school-age childcare out of term	37%	31%	34%	31%	33%

3.6 Opening hours

This year's survey asked services how many hours they operate per week during term time and out of term time as well as how many weeks per year they are open.

Figure 3.8 outlines the percentage of services by number of hours services operate per week during the term time. Over one third of services (35%) operate 15 hours or less during term time. Private services (36%) are slightly more likely to be open for 15 hours or less than community services (30%).

Almost three in ten services (28%) open for more than 40 hours a week during term. Of these, community services are more likely to open between 41 and 50 hours (19%) while private services are more likely to open for over 50 hours a week (15%).

Figure 3.8 Percentage of services by number of hours services operate per week (in term)

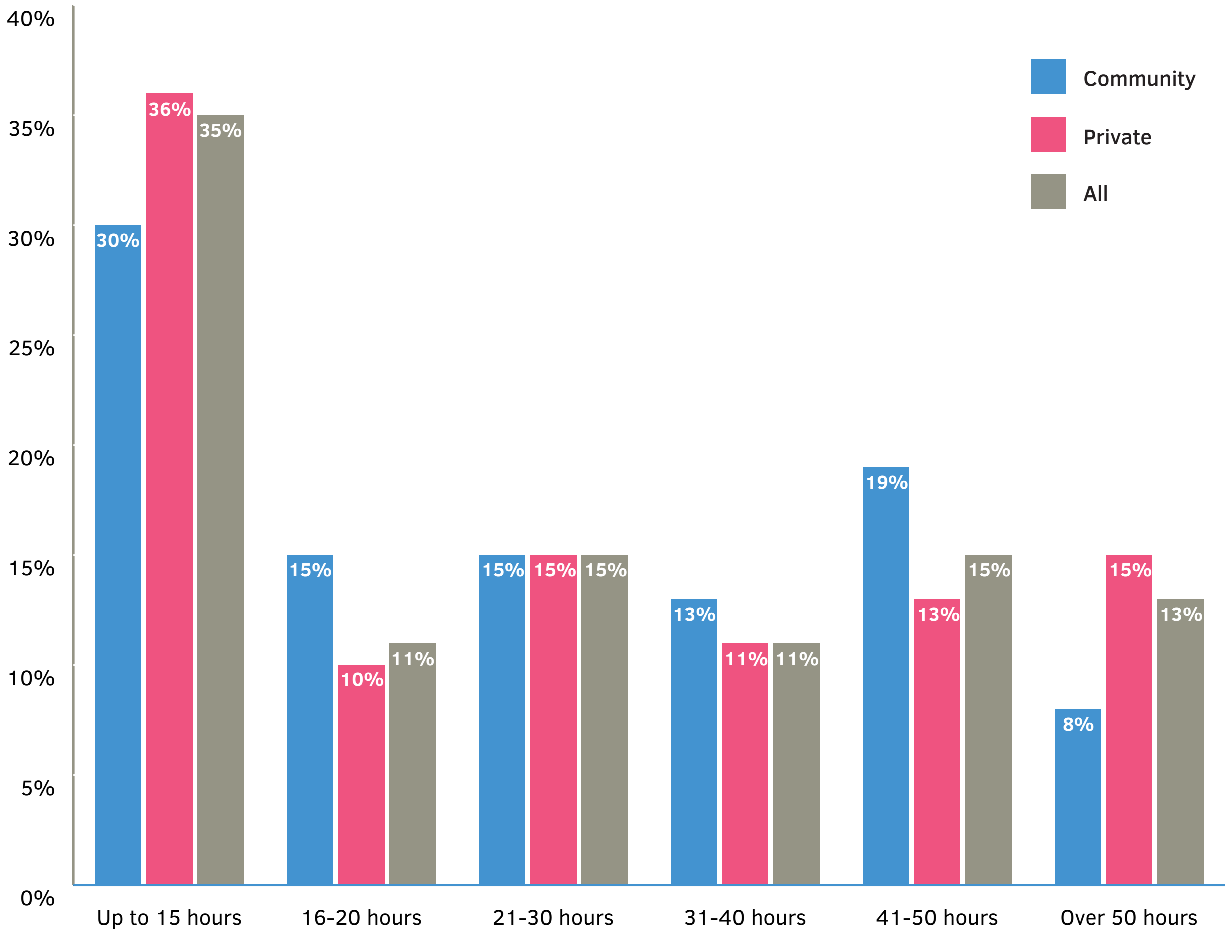
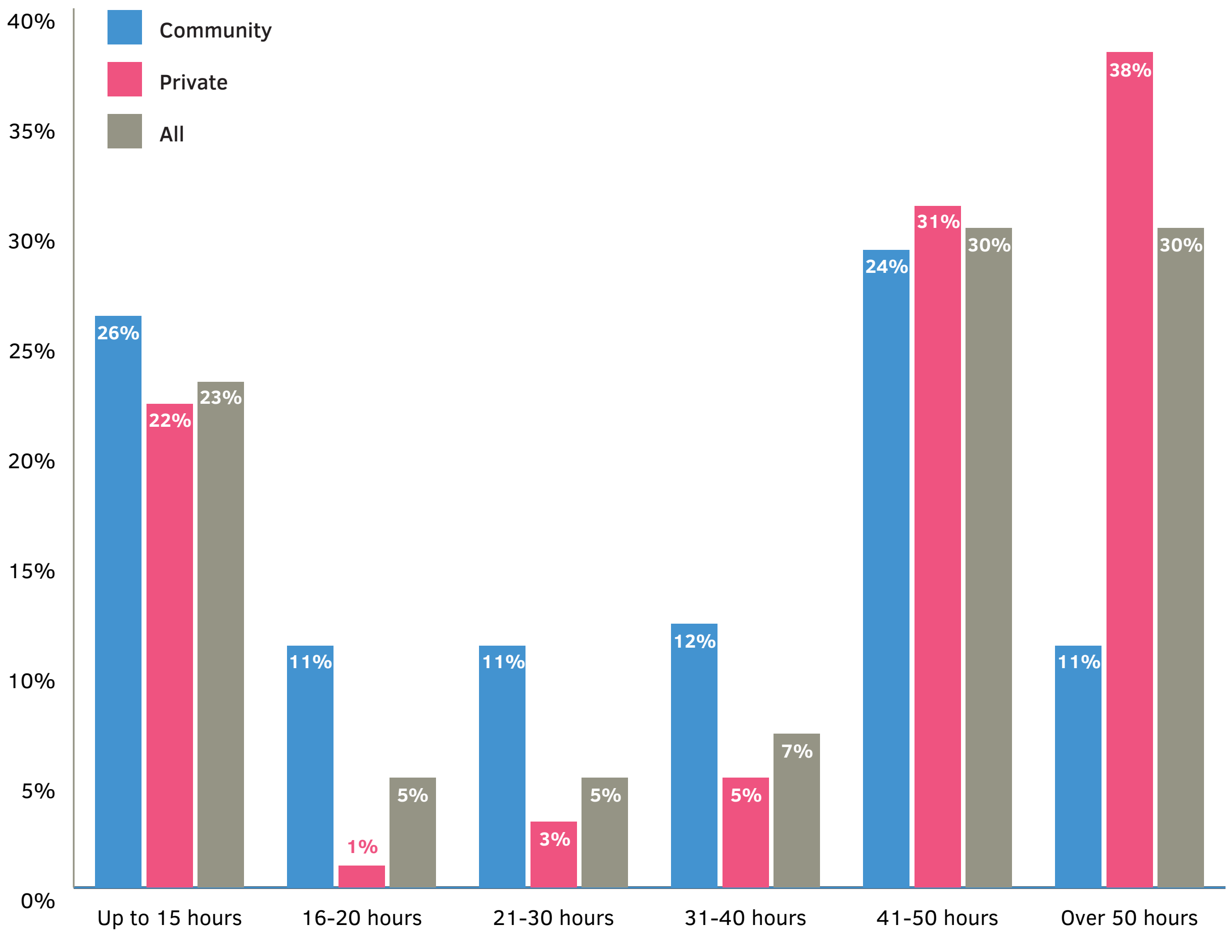


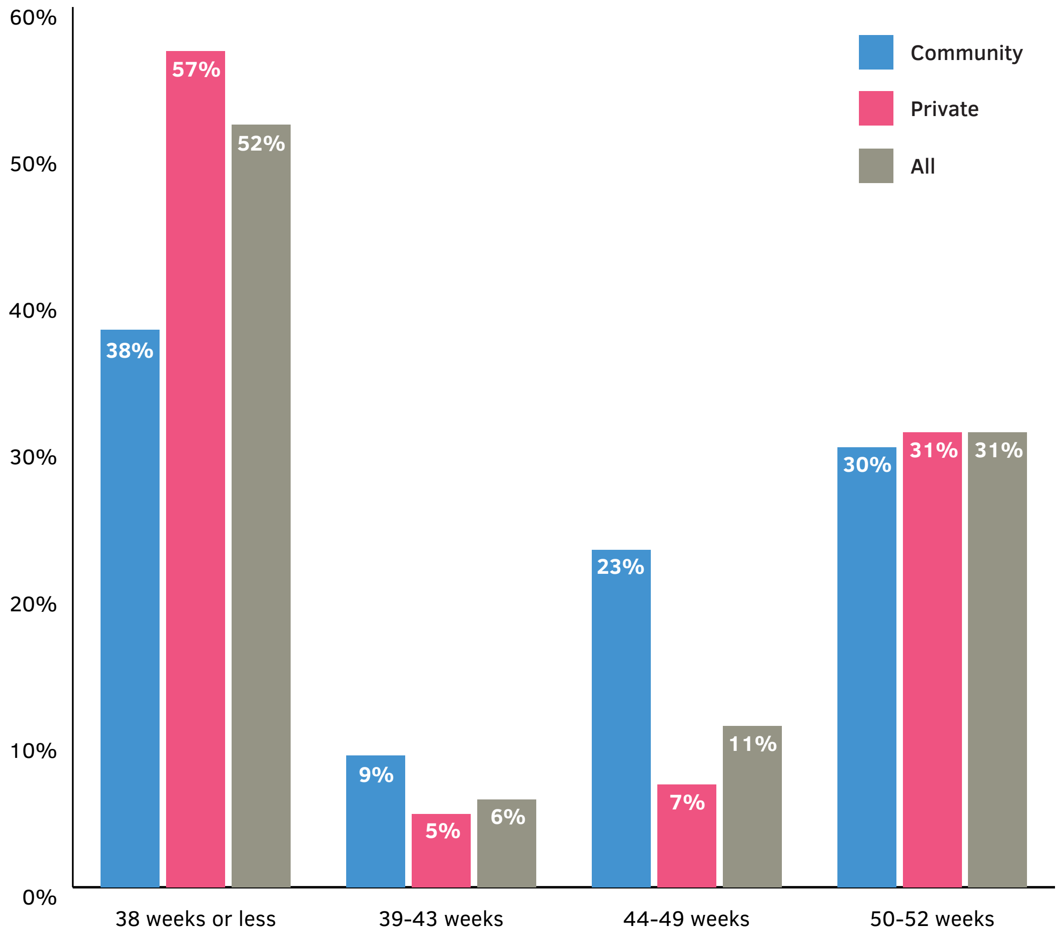
Figure 3.9 presents the percentage of services by number of hours services operate per week (out of term). Of the services that open out of term time, the majority (60%) operate over 40 hours per week. Private services are more likely to operate this many hours (69%) than their community counterparts (40%). Almost one quarter of services (23%) open for 15 hours or less out of term time with community services more likely to operate for fewer than 15 hours.

Figure 3.9 Percentage of services by number of hours services operate per week (out of term)



Over half of services (52%) are open for up to 38 weeks. Private services are more likely to open for a shorter number of weeks (57%) compared to community services (38%). Almost one third of services (31%) operate between 50 and 52 weeks per year with almost equal percentages across community and private services. Almost a quarter of community services operate between 44 and 49 weeks (235) compared to only 7% of private services. For a detailed breakdown, see Figure 3.10.

Figure 3.10 Percentage of services by number of weeks per year services are operational and by organisation type



3.7 Premises ownership

The survey responses in respect of premises ownership reveal a similar profile to that recorded in 2017/18. Almost half of the providers (48%) own their premises, with a further 38% leasing them. This is a reduction of 4% since last year. Please note that an additional option was added to this year's survey: "licensing agreement". It is therefore possible that the 4% reduction in the number of services leasing their premises is due to some of the respondents choosing "licencing agreement" instead of "leased", as it better describes their situation. The new category of "licencing agreement" was chosen by 6% of respondents. There has been a 2% reduction since 2017/18 in the proportion of services who have no formal agreement, which signals a reversal of the increase of 2% of this category last year.

The proportion of providers who own their premises is higher amongst private services (53%) than among community providers (37%), and is slightly higher in rural areas than in urban locations (difference of 6%). Community facilities are more likely to have no formal agreement in place for their premises (15%) compared to their private counterparts – 5%. The proportion of community facilities with no formal agreement decreased by 2% since 2017/18. For a detailed breakdown see Table 3.4.

Table 3.4 Percentage of services by premises ownership

Premises ownership	Community (1,029)	Private (2,792)	Urban (2,493)	Rural (1,328)	All (3,821)
Owned	37%	53%	46%	52%	48%
Leased	40%	37%	39%	35%	38%
No formal agreement	15%	5%	7%	8%	8%
Licensing agreement	8%	5%	7%	5%	6%

3.8 Location of premises

There are notable differences between community and private providers in regard to the location of premises. While the majority of all services (54.6%) operate from privately owned premises, the corresponding figures are 68.9% for private providers and 16.1% for community services. Almost half of all community services are located in a community facility (45%), compared to 6.9% of private facilities. Also, more community services than private ones are based in schools, 16.8% and 13.4%, respectively.

Services located in urban areas are more likely to operate from private premises (56.6%) compared to their rural counterparts (50.9%). On the other hand, 20.3% of services in rural areas are based at a community facility (a reduction of 3% since 2017), compared to 15.6% in urban areas. For the remaining premises locations, there are no major differences based on the urban or rural location of a service (for a detailed breakdown see Table 3.5).

In 2018/19, for the first time in the survey, services who indicated operating from private premises were asked whether the premises were purpose built or converted. The majority of private premises (52%) were purpose built, which were followed by converted residential (35%). Only 13% were converted from a commercial building.

Table 3.5 Percentage of services by premises location

Premises location	Community (1,029)	Private (2,792)	Urban (2,493)	Rural (1,328)	All (3,821)
Community facility	45.0%	6.9%	15.6%	20.3%	17.2%
Employer facilitated premises	0.7%	1.1%	1.2%	0.6%	1.0%
Family Resource Centre	4.3%	0.1%	1.5%	0.8%	1.3%
Other	11.2%	3.9%	6.2%	5.3%	5.9%
Parish hall	4.1%	3.7%	2.9%	5.4%	3.8%
Private premises[20]	16.1%	68.9%	56.6%	50.9%	54.6%
School	16.8%	13.4%	13.6%	15.5%	14.3%
Sports facility	1.6%	1.9%	2.2%	1.2%	1.8%
University	0.2%	0.1%	0.2%	0.0%	0.1%

20 Private premises include converted commercial, converted residential and purpose built premises.

3.9 Commercial rates

Almost one third of the services (31%) who responded to the service profile survey were charged commercial rates in 2018/19. Table 3.6 shows the percentage of services that have been billed for rates each year since 2013. In 2018/19, the proportion of services that were charged commercial rates was unchanged from the previous year.

Table 3.6 Percentage of services billed for rates between 2013 and 2018/19

	2013	2014	2015/16	2016/17	2017/18	2018/19
% of services billed for rates	26%	35%	32%	29%	31%	31%

There are differences in respect to the types of services that reported being billed for rates. As in previous years, private services (38%) and those in urban areas (37%) are more likely to be charged commercial rates. A detailed breakdown is shown in Table 3.7.

Table 3.7 Percentage of services billed for commercial rates

Billed for rates	Community	Private	Urban	Rural	All
Yes	14%	38%	37%	21%	31%
No	86%	62%	63%	79%	69%
Total number of services	**1,029**	**2,792**	**2,493**	**1,328**	**3,821**

Nationally, the average rate that services were billed for was €4,785 in 2018/19. This represents a reduction of 0.4%, from €4,806[21] in 2017/18. The local authorities have autonomy as to how they apply the levy and collect the rates[22], resulting in significant differences between counties.

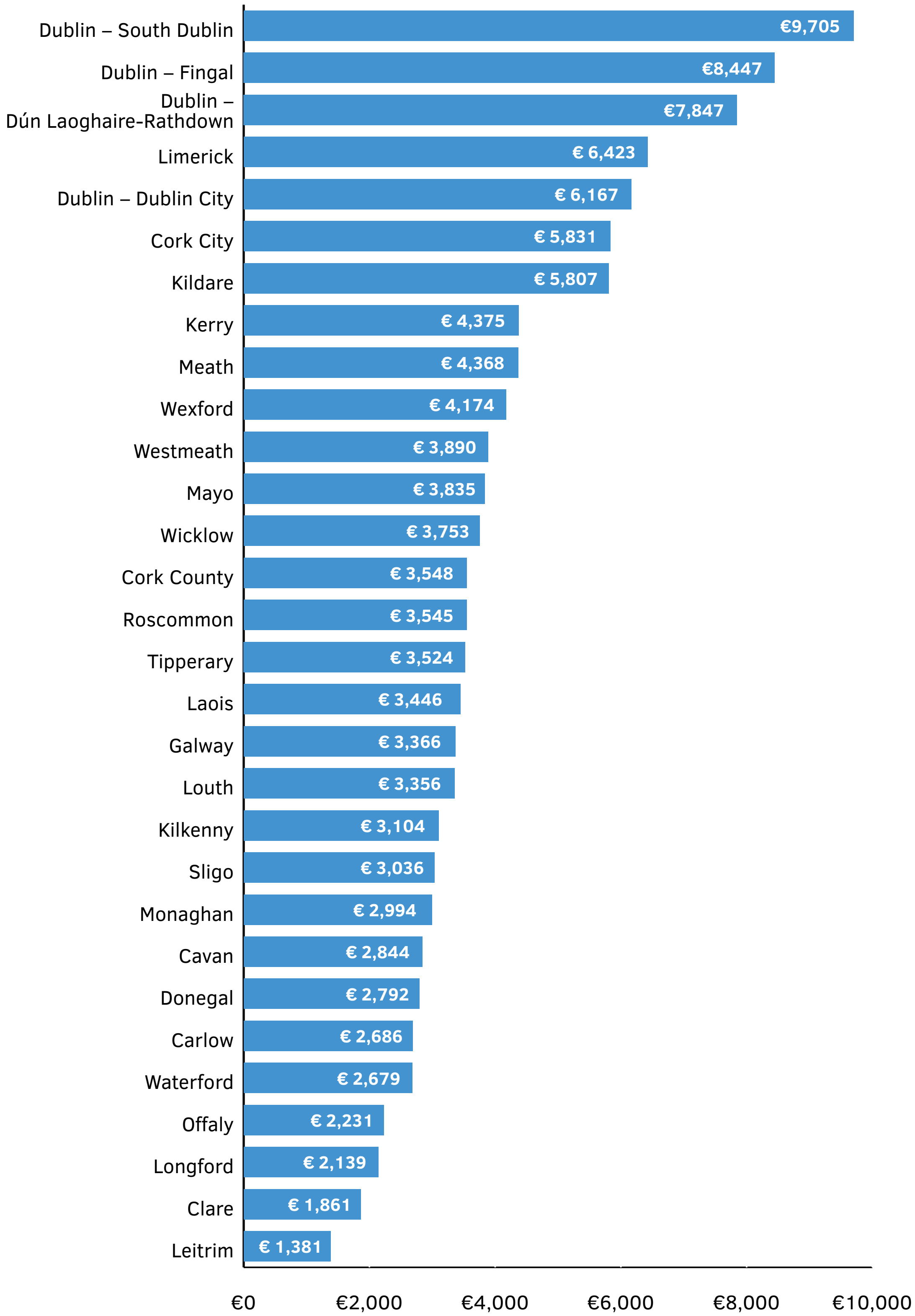
Figure 3.11 shows the average amounts of the most recent commercial rates charged to ELC and SAC services at county level. The highest rates were in the Dublin local authority areas (South Dublin, Fingal, Dún Laoghaire-Rathdown and Dublin City), Limerick, Cork City and Kildare. The average rates charged in these local authority areas and counties are above the national average. The lowest rates were charged in Leitrim, Clare, Longford and Offaly. Compared to last year, the amount of rates charged increased in the majority of counties (20), while decreases were recorded for 10 counties. The highest increases of average county rates were recorded in Wexford (73%), Wicklow (41%), Kerry (39%), Cavan (30%) and Louth (26%). The highest reductions were in Waterford (48%), Offaly (33%), Longford (21%), and South Dublin (14%).

21 Note: the mean (average) rate nationally reported in the 2017/18 Early Years Sector Profile was €3,949. The rate used for 2017/18 in this report was recalculated using the same methodology applied for calculating this year's national mean.

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

The national median was €2,965, meaning that half of services across the country paid rates of this value or lower. The gap between the highest and lowest average rates at county level has reduced by 15%, from €9,743 in 2017/18 to €8,324 this year.

Figure 3.11 County average of most recent commercial rates bill



The level of rates charged varies also in regard to the type of provider. Table 3.8 shows the changes in commercial rates (by bands) over the last three years by organisation type. Seven in ten services were charged rates of €5,000 or below in 2018/19, while 12% of services pay rates above €10,000. Community services[23] usually pay lower rates, with 46% paying less than €1,000, compared to only 16% of private providers. Over the last three years, the proportion of services paying higher rates (above €5,000) has increased by 5%.

Table 3.8 Rates bills (in bands) by organisation type

	Community			Private			All		
	2016/17	2017/18	2018/19	2016/17	2017/18	2018/19	2016/17	2017/18	2018/19
Under €1,000	54%	44%	46%	22%	19%	16%	26%	22%	20%
€1,000-€5,000	29%	38%	34%	51%	53%	52%	49%	51%	50%
€5,001-€10,000	13%	9%	13%	16%	17%	19%	15%	16%	18%
Over €10,000	4%	9%	7%	11%	11%	13%	10%	11%	12%

3.10 Curriculum and quality standards

ELC and SAC services follow a number of different curricula approaches. *Aistear*, the national Early Childhood Curriculum Framework, is the most widely used, with 89% of services who completed the survey reporting its adoption.

Síolta standards were applied by 82% of services. Steady growth in the share of services adopting these two approaches has been observed over the last number of years and has continued this year, with the share of *Aistear* adoption growing by 5% and the proportion of services applying *Síolta* standards increasing by 8% since last year.

Levels of uptake of other curricula approaches are similar to those reported for 2017/18. This is with the exception of play-based curricula, the use of which continues to rise (from 52% in 2016/17 to 59% last year and 68% this year). For a detailed breakdown, see Table 3.9.

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

23 Note: community services are excluded from paying rates. However, as many community services operate as part of a bigger community organisation, their umbrella organisation may still be charged such rates and therefore, these are reported by some community services.

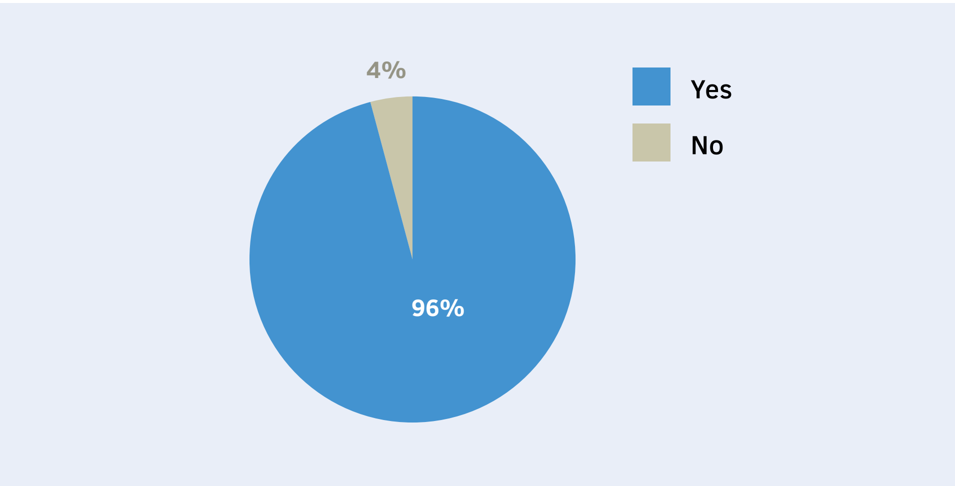
Table 3.9 Percentage of services by curriculum approaches and quality framework

	Community	Private	Urban	Rural	Total
Síolta	81.2%	82.6%	82.1%	82.6%	82.3%
Aistear	86.9%	89.7%	88.6%	89.5%	88.9%
Play-based curriculum	67.7%	68.0%	67.1%	69.5%	67.9%
Montessori	10.8%	52.4%	43.6%	36.7%	41.2%
HighScope	20.5%	6.3%	10.5%	9.4%	10.2%
Naíonra	5.2%	5.2%	6.2%	3.2%	5.2%
Early Start	4.6%	4.1%	4.6%	3.6%	4.2%
Steiner	1.7%	1.9%	1.9%	1.7%	1.9%
ABA (ASD children)	0.6%	0.9%	0.9%	0.6%	0.8%
Froebel	0.5%	1.2%	1.3%	0.5%	1.0%
None	3.5%	0.9%	1.7%	1.4%	1.6%
Other	7.6%	2.7%	4.3%	3.5%	4.0%
Total	**1,029**	**2,792**	**2,493**	**1,328**	**3,821**

3.11 Outdoor spaces

The vast majority of ELC and SAC childcare services (96%) reported having an outdoor space. This figure increased by 2% since 2017/18.

Figure 3.12 Percentage of services with an outdoor play area on their premises



3.12 Transport services

Some ELC and SAC services offer pick up and drop-off services. Over a quarter (27%) of services offer some level of transport. Private services are more likely to offer transport (29%) compared to community services (22%). There is very little difference in the percentage of services offering transport between urban (26.5%) and rural (27%) based services.

Drop-off and pick up is the most common service offered. Of the services that offered some level of transport, 66% offered both drop-off and pick up, while 32% offered only pick up and 2% offered drop-off only.

Table 3.10 details the percentage of services offered by organisation type and location of service.

Table 3.10 Percentage of services offering transport services by organisation type and location

	Community	Private	Urban	Rural	All
Pick up	48%	28%	34%	30%	32%
Drop-off	2%	1%	1%	2%	2%
Both	50%	71%	65%	68%	66%

3.13 Services provided through the medium of Irish

This year's survey collected information on whether the service provided ELC and SAC through the medium of Irish. 373 services (10%) responded 'Yes' to this question. Of these 373 services, a large majority (78%) are private and the remaining 22% are community. Services providing childcare through the medium of Irish are more likely to be located in rural areas (67%) compared to 33% in urban areas.

In comparison, from a total of 4,598 services contracted to offer at least one DCYA funding programme, 213 are located in Gaeltacht areas in counties Cork, Donegal, Galway, Kerry, Mayo, Meath and Waterford. The split between community and private services in these locations is almost even with 49% community and 51% private settings. Almost two thirds (72%) of Gaeltacht services are in rural areas with the remaining 28% in urban areas.

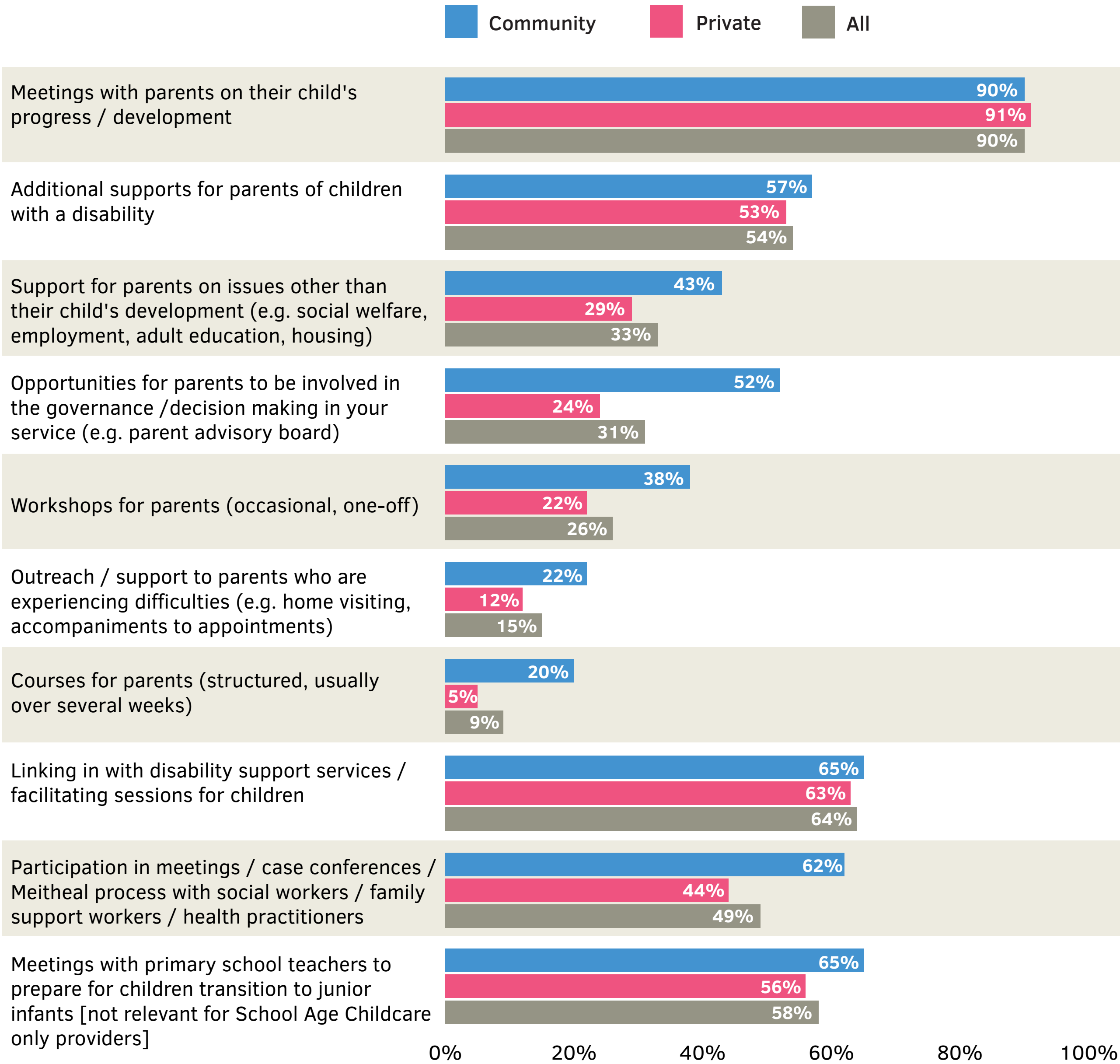
3.14 Additional support provided by services to parents/families and engagement with other stakeholders

This year's survey included a number of questions related to the implementation of the *First 5 Strategy* (see section 1.2). Respondents were asked about additional supports provided by services to parents/families and their engagement with other stakeholders in the sector, such as primary school teachers or family support workers. The responses to these questions are detailed in Figure 3.13.

The majority of services (90%) meet with parents to review their child's progress and development. Other services provided by a large number of services were linked to supporting parents with children with disabilities (linking in with disability support services (64%) and providing additional supports for parents of children with a disability (54%)) and working with primary school teachers (meetings with primary school teachers to prepare for children's transition to junior infants (58%)). The lowest number of respondents provided courses for parents, with only 9% providing this service.

There are significant differences between supports offered by community and private services. Overall, community services are more likely to engage with parents. For example, one in five community services offer courses for parents compared to one in twenty of private services. Over half of community services (52%) reported providing opportunities for parents to be involved in the governance and decision-making in services, compared to 24% of private settings.

Figure 3.13 Percentage and number of services provided by ELC and SAC settings



4 Children in Early Learning and Care and School-Age Childcare settings

Children in Early Learning and Care and School-Age Childcare settings

20,626

one parent families availing of ELC and SAC services

11,698

children with additional needs attended ELC and SAC services (**7%** of all children enrolled)

An estimated

3,015

Traveller children attended services

Over **three-quarters** of services are wheelchair accessible

(78%)

61%

of services had staff who completed the 'Equality, Diversity and Inclusion' training program

4.1 Introduction

In 2016, the Department of Children and Youth Affairs (DCYA) published the *Diversity, Equality and Inclusion Charter and Guidelines* (DCYA, 2016). These guidelines aim to support and empower those working in the sector to explore, understand and develop inclusive practices for the benefit of children, their families and wider society. The introduction of the guidelines, as well as the roll out of the Access and Inclusion Model (AIM) for children with disabilities, encourages Early Learning and Care (ELC) and School-Age Childcare (SAC) services to sign up to a National Inclusion Charter by developing and implementing an inclusion policy for their own setting.

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

4.2 Equality and diversity

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

4.2.1 One parent families

Three quarters of survey respondents (2,878 services) reported having children attending who come from one parent families (see Table 4.1). This is up 2% on the previous year. In total, 20,626 one parent families were reported to be availing of ELC/SAC services, based on the service profile survey in 2018/19. Of these, 44% (9,031) availed of ECCE. Just over half of one parent families (51%) availed of childcare from community services, which is unchanged from last year. A higher proportion of one parent families (80%) availed of childcare in services based in urban areas, which is similar to last year when the proportion was 81%.

Table 4.1 Number of ELC and SAC services with children from one parent families

	Community	Private	Urban	Rural	All
Number of services used by one parent families	911	1,967	1,983	895	2,878
% of services used by one parent families	89%	70%	80%	67%	75%
Number of one parent families using ELC/SAC services	10,592	10,034	16,560	4,066	20,626

4.2.2 Children with neither English nor Irish as their first language

The survey responses reveal how ELC and SAC settings reflect the increasing diversity of Irish society, with linguistic diversity being one indicator thereof. As Table 4.2 shows, 68% of services have at least one child for whom neither English nor Irish is a first language. These services in total reported 21,546 children belonging to this group. They represent 12% of all children enrolled (177,970) – slightly less than last year when it was 13%. 13,326 children from this group (62%) availed of ECCE – a significantly higher proportion when compared to children from other target groups, with the exception of Roma (64%). The proportions in each category remain mostly unchanged since last year (Table 4.2).

Table 4.2 Number of children attending ELC and SAC services for whom neither English nor Irish is a first language

	Community	Private	Urban	Rural	All
Number of services with children with neither English nor Irish as their first language	736	1,878	1,984	630	2,614
% of services with children with neither English nor Irish as their first language	72%	67%	80%	47%	68%
Number of children with neither English nor Irish as their first language	6,576	14,970	19,455	2,091	21,546

4.2.3 Traveller and Roma children

In the 2018/19 survey, 650 services reported having at least one Traveller child attending their service. This represents 17% of respondents, which is slightly higher than last year when it was 16%.

According to the most recent Census of Population (2016), there are 12,313 Irish Traveller Children (aged 0 to 14 years) residing in the State, of whom 5,199 were aged between 0 and 6 years of age at the time of the Census[24].

The survey data recorded 2,601 Traveller children enrolled in ELC and SAC services in 2018/19. This represents 1.5% of all children enrolled, the same proportion as last year. If this figure is extrapolated, it can be estimated that there were 3,015 Traveller children in ELC/SAC services over 2018/19, 2% less than last year. Just under half of Traveller children enrolled availed of ECCE (46%).

Table 4.3 shows the breakdown of Traveller children in services by organisation type and location. Like in previous years, the majority of Traveller children (70%) attended community services and those based in urban areas (88%).

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

Table 4.3 Number of Traveller children in ELC and SAC services

	Community	Private	Urban	Rural	All
Number of services with Traveller children attending	346	304	517	133	650
% of services with Traveller children attending	34%	11%	21%	10%	17%
Number of Traveller children attending	1,813	788	2,286	315	2,601
% of Traveller children attending (as % of all Traveller children)	70%	30%	88%	12%	100%

The Irish Census of Population does not record data for Roma as a discrete category[25]. Kennedy (2018) notes that numbers of Roma resident in the State varies, and is usually estimated to be around 5,000. 268 services reported having at least one Roma child attending their facility (7% of all survey respondents). In total, 681 Roma children were enrolled in ELC services of whom 64% availed of ECCE. Roma children represented 0.4% of all children enrolled, the same proportion as last year. When extrapolated, it can be estimated that there are 789 Roma children in ELC/SAC services. This represents a 2% decrease on the previous year, when it was estimated that 805 Roma children were attending ELC services.

Table 4.4 shows the breakdown of Roma children in services by organisation type and location. Like in previous years, the majority of Roma children were enrolled in private facilities (58%). The vast majority of Roma children (94%) attended services in urban areas.

Table 4.4 Number of Roma children attending ELC and SAC services

	Community	Private	Urban	Rural	All
Number of services with Roma children attending	96	172	240	28	268
% of services with Roma children attending	9%	6%	10%	2%	7%
Number of Roma children attending	281	400	641	40	681
% of Roma Children attending (as a % of all Roma children)	42%	58%	94%	6%	100%

25 Roma were not enumerated separately from Irish Travellers in the 2016 Census of Population.

4.3 Disability

4.3.1 Children with additional needs[26]

Survey respondents were asked to specify the number of children attending their services with additional needs. The breakdown by organisation type is presented in Table 4.5. Over three quarters of services reported having at least one child with additional needs[27]. In total, services reported 11,698 children with additional needs attending their services in 2018/19. These children represent 7% of all children enrolled.

Table 4.5 Number of children with additional needs attending ELC and SAC services by organisation type

	Community		Private		All	
	Services	Children	Services	Children	Services	Children
Number of services / children with additional needs	874	4,611	2,074	7,087	2,948	11,698
Percentage of services / children with additional needs	85%	39%**	74%	61%**	77%	7%*

* Calculated as % of all children enrolled in ELC/SAC services (177,970 children)
** Calculated as % of all children with additional needs

4.3.2 Children with a diagnosed disability

Survey respondents were also asked to provide further data on children with additional needs who had a diagnosis from the HSE. Just over half of services (54% or 2,054) have at least one child with a diagnosed disability, a lower proportion than in the previous year when it was 65%. Community services are more likely to cater for children with a diagnosed disability, with 63% of services having at least one child attending (653) compared to 50% (1,401) of private services.

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

Table 4.6 presents the breakdown of services and children by type of diagnosed disability and by organisation type. The biggest group of children had a learning disability (3,389), while the smallest were children with a physical disability (999). 2,349 children had more than one need.

26 Children with additional needs can be described as those with any of various difficulties (such as a physical, emotional, behavioral, or learning disability or impairment) that causes an individual to require additional or specialised services or accommodations (such as in education or recreation). Source: https://www.merriam-webster.com/dictionary/special%20needs
27 This includes children with diagnosed and undiagnosed additional needs.

Table 4.6 Breakdown of services and children with a diagnosed disability attending ELC and SAC services by organisation type

Number of services and children with:	Community		Private		All	
	Services	Children	Services	Children	Services	Children
Physical disability	247	435	467	564	714	999
Sensory impairment	280	494	540	788	820	1,282
Learning disability	515	1,403	1,055	1,986	1,570	3,389
Other disability	258	526	518	823	776	1,349
More than one need	436	978	842	1,371	1,278	2,349

4.3.3 Wheelchair access

Almost eight in ten services (78%) are wheelchair accessible. This figure is similar to that recorded last year (77%). Community services were more likely to be wheelchair accessible (86%) than private providers (76%). Geographically, there are variations, with more services in rural areas (85%) than in urban areas (75%) having wheelchair access. The percentage of wheelchair-accessible premises ranges from below 70% in all four Dublin local authorities to over 85% in counties Kerry (86%), Waterford (86%), Mayo (87%), Donegal (89%), Roscommon (89%), Monaghan (91%), Westmeath (93%), Leitrim (94%) and Cavan (95%).

The highest proportion of premises with wheelchair access where those that were leased (79%) and lowest those with no formal agreement (76%). For details see Table 4.7.

Table 4.7 Wheelchair accessibility by premises ownership

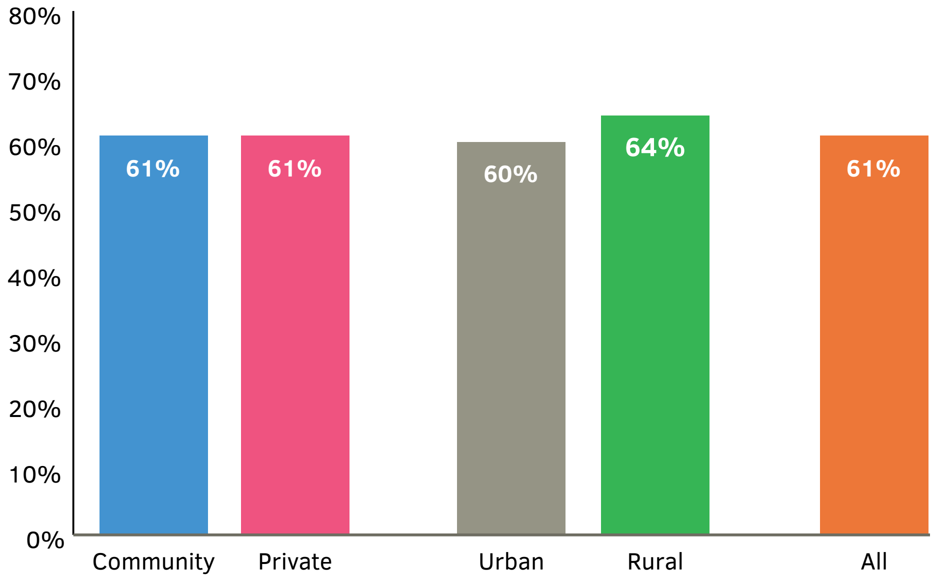
Ownership type	No. of wheelchair accessible premises	Total no. of premises	% of services that are wheelchair accessible
Leased	1,150	1,448	79%
Licensing agreement	178	227	78%
No formal agreement	224	295	76%
Owned	1,441	1,851	78%
All ownership types	2,993	3,821	78%

4.3.4 Inclusion policy and training

There has been an increase in the proportion of providers who reported having an inclusion policy in place, from 95% in 2017/18 to 97% in this year.

In 2018/19, 61% services had a staff member who, in the previous twelve months, had completed the ‘Equality, Diversity and Inclusion Training Programme’ that was rolled out by the City/County Childcare Committees (CCCs) under AIM (Figure 4.1). This proportion is 2% lower than in the previous year. The completion rate is the same for both community and private providers (61%), though it is slightly higher among rural services (64%) compared to those located in urban areas (60%). There are considerable differences across counties, with the lowest completion rate recorded in Leitrim (42%) and the highest in Wicklow (75%).

Figure 4.1 Completion rates of inclusion training by organisation type and urban/rural location



5 Childcare places

Childcare places

An estimated

206,301

children were enrolled in ELC and SAC services, **a 2% increase** on the previous year

12,444

the estimated number of vacant places, **up 13%** from last year

The number of children on waiting lists **increased by**

41%

this year

More than half of all children enrolled are aged between **3 and 5** years

(55%)

The existing national capacity would cater for an estimated

218,745

children

The average number of children enrolled per service is

47

3 more than last year

5.1 Introduction

In the service profile survey, Early Learning and Care (ELC) and School-Age Childcare (SAC) services were asked to provide information on the number of children enrolled, those on waiting lists as well as the number of vacant places in their facility at the time of the survey. This information was provided by age group and service type. This chapter presents the reported figures and analysis of trends in regard to the number of children enrolled, on waiting lists and number of vacant places. The chapter concludes with an analysis of the existing capacity within the sector and planned changes in the number of places offered by services going forward.

In 2018/19, ELC and SAC services reported a total of **177,970 children enrolled** and **10,735** vacant places across Ireland. Table 5.1 presents the number of children enrolled, on waiting lists and the number of vacant places by age range. A detailed analysis of this data is included in the subsequent sections in this chapter. A county level breakdown of this data is included in Appendix I.

Table 5.1 Number of children enrolled, on waiting lists and number of vacant places by age range

Age range	Children enrolled	Vacant places	Waiting list
Up to 1 year (0-12 months)	2,991	245	2,525
1 year+ to 2 years (13-24 months)	10,895	430	3,556
2 years+ to 3 years (25-36 months)	19,515	1,090	4,004
3 years+ to 4 years (37-48 months)	49,957	2,952	4,400
4 years+ to 5 years (49-60 months)	48,234	2,133	1,962
5 years+ to 6 years (61-72 months)	16,037	1,391	1,311
6 years+ to 8 years (73-96 months)	15,315	1,318	1,333
8 years+	15,026	1,176	912
Total	**177,970**	**10,735**	**20,003**

In 2018/19, services reported 197,601 children enrolled and 24,959 on waiting lists by service type. The number of vacant places by service type was 19,558. The totals are greater than the figures by age, as one child may avail of more than one service type. For a detailed breakdown of children enrolled, on waiting lists and vacant places by service type see Table 5.2. Further analysis of this data is also included in the subsequent sections of this chapter.

Table 5.2 Number of children enrolled, on waiting lists and vacant places by service type

Service type	Children enrolled	Vacant places	Waiting list
Breakfast club	10,350	2,132	555
Drop-in	637	246	29
Full day care	38,063	2,110	8,504
Part-time care	23,064	2,339	4,734
School-age childcare (after-school)	40,588	4,146	4,160
Sessional	84,899	8,585	6,977
Total	**197,601**	**19,558**	**24,959**

Table 5.3 presents the number and percentage of services and the age groups they cater for. Over 90% of services offer care to children aged 3+ to 5 years. This is in line with trends observed in previous years and the fact that the majority of children enrolled (55%) are in this age group. As in previous years, the smallest share of facilities offer places for babies – the percentage of services that offer this type of provision decreased by 1% on 2017/18.

Compared to the previous year, the share of services offering places to children of school age (6+ years) increased by 4% (from 36% to 40% for 6+ to 8 years old and from 32% to 36% for children aged 8 and over). An even higher increase was observed in the number of services offering care for children 5+ to 6 years, from 52% in 2017/18 to 58% this year. Please note that only children aged 6+ are included in figures or analyses of school-age childcare. The reason for this is that while children can legally attend school from the age of 4, 6 is the age by which all children must be enrolled in formal education. Services were not asked to report on the numbers of school-going children attending their service, so a breakdown of data by service type, age range and school attendance is not possible from the 2018/19 dataset.

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

Age range	Community	Community %	Private	Private %	All	% of all services
Up to 1 year (0-12 months)	203	29%	487	71%	690	18%
1 year+ to 2 years (13-24 months)	337	30%	772	70%	1,109	29%
2 years+ to 3 years (25-36 months)	585	29%	1,459	71%	2,044	53%
3 years+ to 4 years (37-48 months)	899	25%	2,640	75%	3,539	93%
4 years+ to 5 years (49-60 months)	892	26%	2,564	74%	3,456	90%
5 years+ to 6 years (61-72 months)	652	30%	1,550	70%	2,202	58%
6 years+ to 8 years (73-96 months)	507	33%	1,009	67%	1,516	40%
8 years+	492	36%	878	64%	1,370	36%
Total	**1,029**	**27%**	**2,792**	**73%**	**3,821**	**100%**

5.2 Enrolments

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

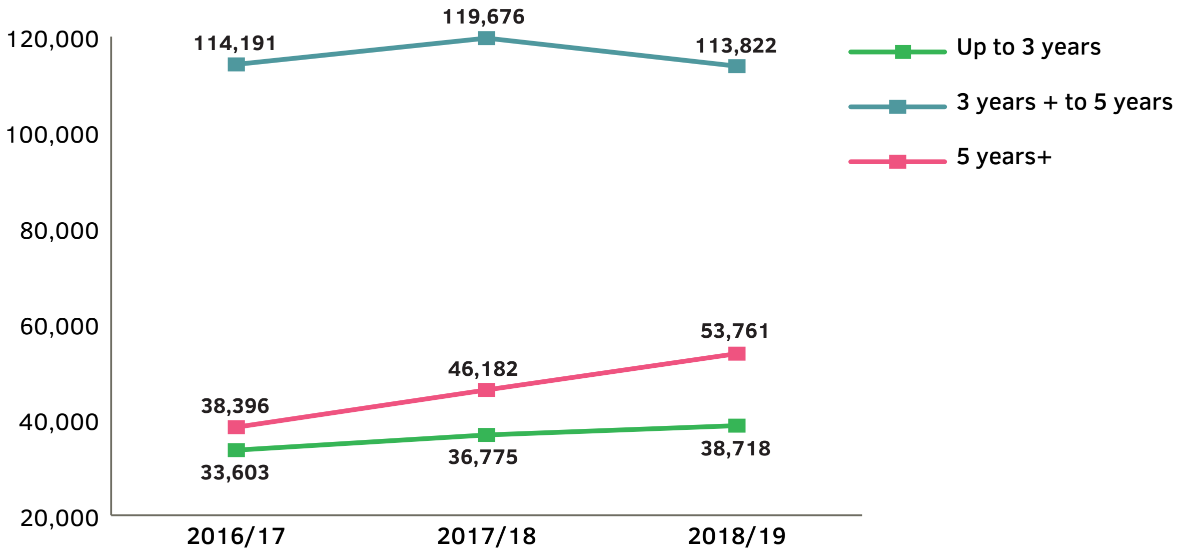
Survey respondents reported a total of **177,970** children enrolled by age range and **197,601** children enrolled by service type. Based on the extrapolation (factoring for non-respondents), it was estimated that there were **approximately 206,301 children enrolled nationally**, by age range, at the time of the survey. This represents an increase of 2% on the previous year.

Table 5.4 and Figure 5.1 show the breakdown of children enrolled by age group over the last three years. Compared to the previous year, the number of children enrolled in each age group increased with the exception of two groups: up to 1 year olds, whose number decreased by 5% and those aged 3 years+ to 4 years, a reduction of 10%. The highest increase, of 21%, was observed for children aged 8 years and over.

Table 5.4 Number of children enrolled by age range for 2016/17, 2017/18 and 2018/19

Age range	Survey data			Extrapolated		
	2016/17	2017/18	2018/19	2016/17	2017/18	2018/19
Up to 1 year (0-12 months)	2,982	3,109	2,991	3,542	3,637	3,467
1 year+ to 2 years (13-24 months)	9,138	10,275	10,895	10,854	12,021	12,629
2 years+ to 3 years (25-36 months)	16,169	18,049	19,515	19,206	21,117	22,622
3 years+ to 4 years (37-48 months)	52,573	54,837	49,957	62,448	64,157	57,910
4 years+ to 5 years (49-60 months)	43,561	47,454	48,234	51,743	55,519	55,912
5 years+ to 6 years (61-72 months)	11,986	14,183	16,037	14,237	16,593	18,590
6 years+ to 8 years (73-96 months)	11,007	13,036	15,315	13,075	15,252	17,753
8 years+	9,331	12,254	15,026	11,084	14,337	17,418
Total	**156,747**	**173,197**	**177,970**	**186,190**	**202,633**	**206,301**

Figure 5.1 The number of children enrolled (extrapolated) by age group between 2016/17 and 2018/19



In 2018/19 the average number of children in ELC/SAC services was **47**. This represents an average increase of three children per facility on the previous year. Services in urban locations are larger, with 49 children on average, compared to 41 in rural facilities. Community services are also bigger, with 54 children on average, while private services cater for 44 children.

Figure 5.2 presents the breakdown of children enrolled by age cohort in 2018/19 while Figure 5.3 shows the trends in the distribution by age range over the last three years. As in previous years, the children aged between 3+ and 4 years are the largest cohort accounting for 28% of all children enrolled. They are followed closely by those aged 4+ to 5 years (27%). The cohort with the smallest share are babies (up to 1 year old), who account for 2% of all children enrolled.

Over the last three years, the biggest change was observed in the share of children aged 3+ to 4 years, whose proportion decreased from 34% in 2016/17 to 28% this year. This change is largely linked to the demographic decline in the birth rates. The number of children born in Ireland in 2013 (68,954[28]), who now would be in the 5+ to 6 years age group and two years ago would constitute the 3+ to 4 years age cohort, decreased by 5% over the last two years to 65,536 (approximate number of children in the 3+ to 4 years age group in 2019). The changes in other age cohorts were not as pronounced, however, there has been a steady increase in the proportion of school-age children (aged 6+ to 8 years and 8 years+), whose share grew by 2% between 2016/17 and 2018/19.

28 https://statbank.cso.ie/multiquicktables/quickTables.aspx?id=vsa02_vsa09_vsa18

Figure 5.2 Number and percentage of children enrolled by age range

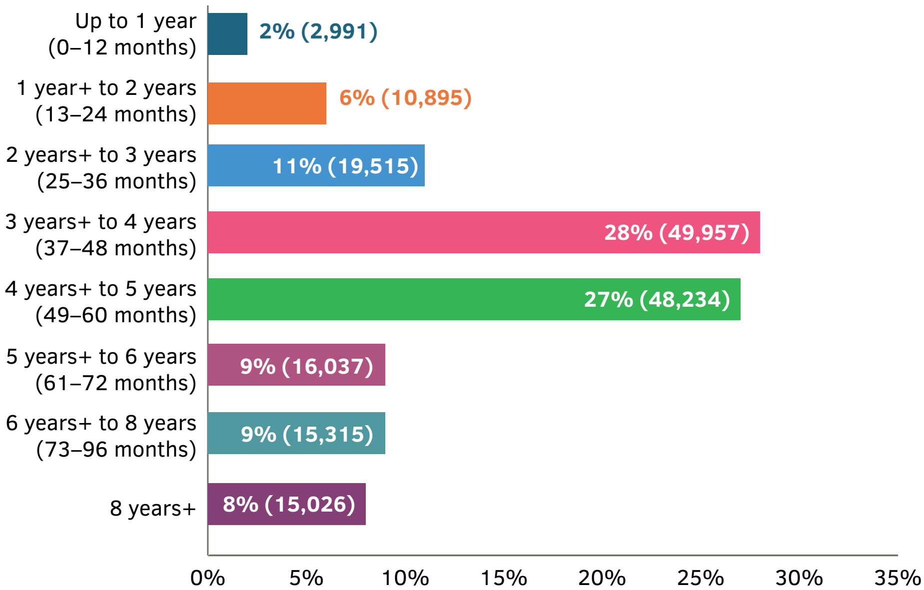
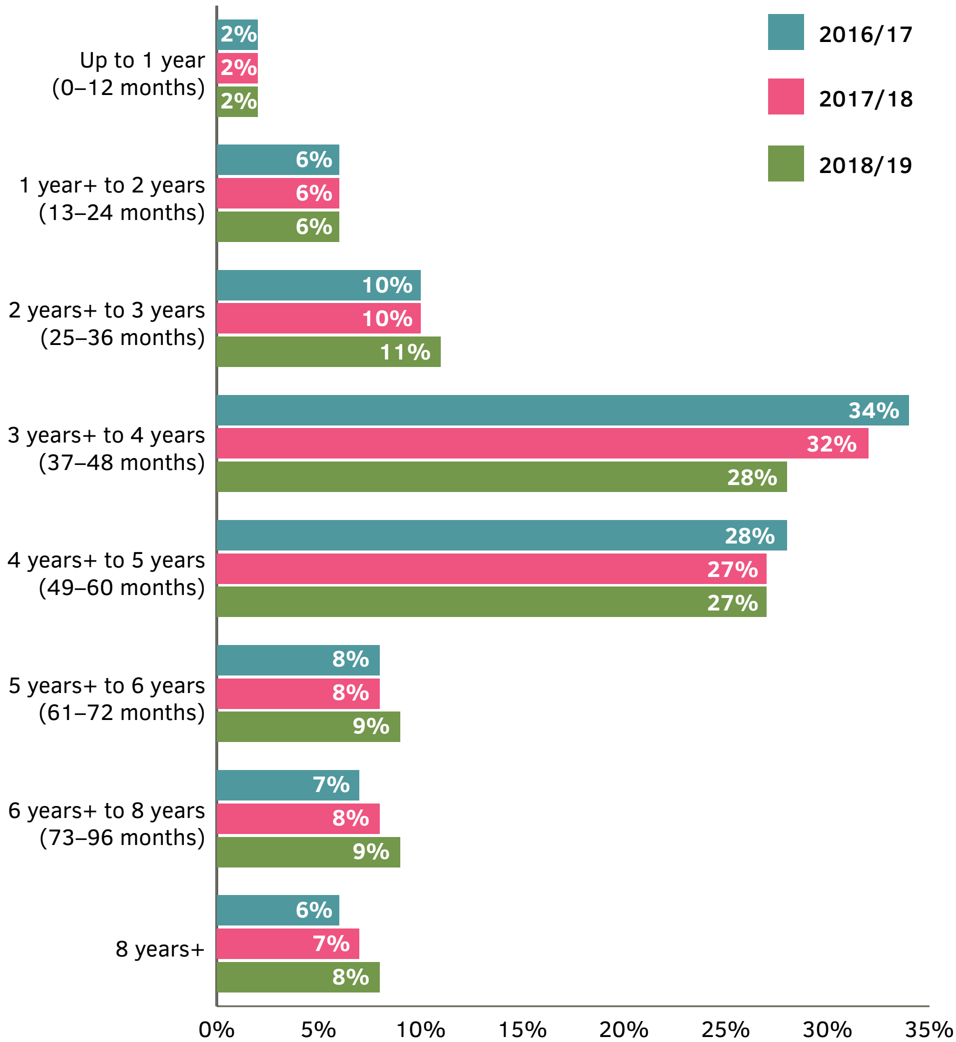


Figure 5.3 Percentage breakdown by age range of children enrolled between 2016/17 and 2018/19



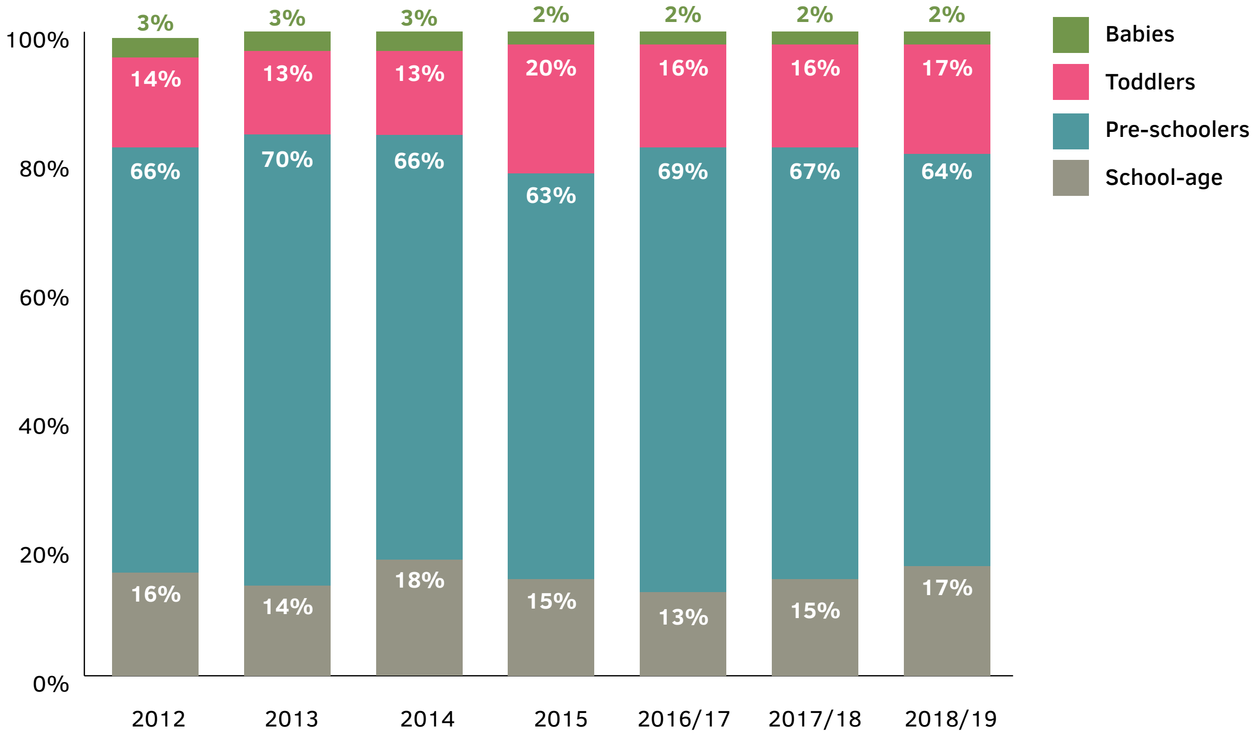
Just under two thirds of children enrolled in services are pre-schoolers (3+ to 6 years old), while toddlers (1+ to 3 years) and school-age children (6 years+) each account for 17% of all children. Like in previous years, the high share of pre-schoolers is linked with a high uptake of ECCE. Between September 2018 and June 2019, 108,137 children benefitted from ECCE (see section 2.2). Babies remain the smallest group, at 2%.

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

Stage in childhood	Age range	Number	% of those enrolled
Babies	Up to 1 year (0–12 months)	2,991	**2%**
Toddlers	1 year+ to 3 years (13–36 months)	30,410	**17%**
Pre-schoolers	3 years+ to 6 years (37–72 months)	114,228	**64%**
School-age	6 years+	30,341	**17%**
	Total	**177,970**	**100%**

The trends in the share of children by stage of childhood (Figure 5.4) over the last few years show that the share of pre-schoolers has been decreasing, from 69% in 2016/17 to 64% in 2018/19, while the percentage of school-age children has been increasing from 13% to 17% in the same period of time. The reduction in the share of pre-schoolers is linked to the demographic change. The increase in the share of school-age children is likely the result of the increased provision of childcare for this age group stimulated by the introduction of School-Age Childcare Capital programmes in 2017. The share of babies and toddlers remained broadly the same.

Figure 5.4 Percentage of children enrolled by stage in childhood, 2012–2018/19



In 2018/19, almost seven out of ten children (69%) were enrolled in private services, while 31% availed of childcare in community services. Private facilities are more likely to provide for babies (73%) and children aged 3+ to 5 years (72%). The proportion of older children (5 years and over) is higher, ranging from 34% (for 5+ to 6 years) to 47% (for 8 years+) in community services than the overall share of children enrolled in this type of facility, at 31%. This trend is similar to the one observed in previous years, however, the overall proportion of children aged 5 and over in private facilities increased compared to last year, from 59% in 2017/18 to 61% this year. For a full breakdown see Table 5.6.

In previous years, community services tended to provide for larger numbers of children. This remained the case in 2018/19, when the average number of children enrolled in community services was 54, compared to 44 in private facilities. The average number of children enrolled increased, for both community and private services, from 52 last year to 54 this year and 41 to 44, respectively.

Table 5.6 Number and percentage of children enrolled by age range and organisation type

Age range	Community	Private	Community %	Private %
Up to 1 year (0-12 months)	810	2,181	27%	73%
1 year+ to 2 years (13-24 months)	3,293	7,602	30%	70%
2 years+ to 3 years (25-36 months)	6,338	13,177	32%	68%
3 years+ to 4 years (37-48 months)	13,974	35,983	28%	72%
4 years+ to 5 years (49-60 months)	13,344	34,890	28%	72%
5 years+ to 6 years (61-72 months)	5,377	10,660	34%	66%
6 years+ to 8 years (73-96 months)	5,559	9,756	36%	64%
8 years+	6,993	8,033	47%	53%
Total	**55,688**	**122,282**	**31%**	**69%**

Table 5.7 presents the breakdown of children enrolled by the location of the service. The majority of children (69%) are enrolled in services located in urban areas. This is in line with the general population distribution within the country – 63% of people in Ireland live in urban areas and 37% in rural areas[29]. Younger children up to 3 years old are more likely to be availing of care in urban services. Almost three quarters of children in this age group (74%) are enrolled in urban services, compared to their overall share of 69%.

The services located in urban areas are larger with the average number of children enrolled being 49 compared to 41 in services located in rural areas. Compared to the previous year, the average number of children in both urban and rural services increased by two children.

29 https://www.cso.ie/en/csolatestnews/presspages/2017/census2016profile2-populationdistributionandmovements/

Table 5.7 Number and percentage of children enrolled by age range and urban/rural location

Age range	Urban	Rural	Urban %	Rural %
Up to 1 year (0-12 months)	2,219	772	74%	26%
1 year+ to 2 years (13-24 months)	8,160	2,735	75%	25%
2 years+ to 3 years (25-36 months)	14,357	5,158	74%	26%
3 years+ to 4 years (37-48 months)	34,712	15,245	69%	31%
4 years+ to 5 years (49-60 months)	32,920	15,314	68%	32%
5 years+ to 6 years (61-72 months)	10,607	5,430	66%	34%
6 years+ to 8 years (73-96 months)	10,202	5,113	67%	33%
8 years+	10,134	4,892	67%	33%
Total	**123,311**	**54,659**	**69%**	**31%**

Dublin City and Cork County have the highest number of children enrolled as reported by services, 16,050 and 15,390, respectively (both 9% of all children enrolled). These are followed by Fingal (11,142), Galway (10,679), South Dublin (9,373) and Kildare (9,215). Almost a quarter of all children were enrolled in services in Dublin County (four local authorities) (24% or 43,588). This is reflective of the population distribution nationally.

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

In 2018/19, services reported 197,601 children enrolled by service type. The largest share of children (43%) availed of sessional care, followed by school-age childcare (20.5%) and full day care (19.3%). Table 5.8 presents the changes in the proportion of children availing of different types of care over time. Over the last three years, there was a decline of 9% in the share of children availing of sessional care. This is in line with the reduction in the number of 3+ to 5 years olds, who mainly avail of the sessional care through the ECCE programme. Over the same period the share of children enrolled for full day care has been steadily increasing from 16% in 2015/16 to 19.3% in 2018/19. The proportion of children availing of school-age childcare has also increased, from 17% last year to 20.5% this year. This corresponds with the increase in the percentage of school-age children (6 years+) from 15% last year to 17% in 2018/19.

Table 5.8 Percentage of children enrolled by service type offered between 2015/16 and 2018/19

Service type	2015/16	2016/17	2017/18	2018/19
Sessional	47.4%	51.5%	47.1%	**43.0%**
Full day care	16.1%	15.8%	18.2%	**19.3%**
School-age childcare (after-school)	18.2%	16.7%	17.0%	**20.5%**
Part-time care	14.2%	12.0%	13.0%	**11.7%**
Breakfast club	3.4%	3.7%	4.4%	**5.2%**
Drop-in	0.7%	0.3%	0.3%	**0.3%**

Table 5.9 shows the breakdown of children enrolled by service type, organisation type and by urban/rural location. The distribution of children enrolled by service type, both for the organisation type and the urban/rural location, is the same as for children enrolled by age group (see Table 5.6 and Table 5.7).

Table 5.9 Number of children enrolled by service type, organisation type and urban/rural location

Service type	Community	Private	Urban	Rural	Total
Breakfast club	2,928	7,422	6,515	3,835	10,350
Drop-in	310	327	334	303	637
Full day care	9,548	28,515	28,918	9,145	38,063
Part-time care	10,086	12,978	16,875	6,189	23,064
School-age childcare (after-school)	15,537	25,051	27,193	13,395	40,588
Sessional	22,594	62,305	56,765	28,134	84,899
Total number of children enrolled	**61,003**	**136,598**	**136,600**	**61,001**	**197,601**
% of children enrolled	**31%**	**69%**	**69%**	**31%**	**n/a**

5.3 Vacant places

In 2018/19, at the time of the survey, services reported 10,735 vacant places. Of the 3,821 services that responded to the survey, 929 services (24%) indicated that they had at least one vacant place within their service. The proportion of services with at least one vacant place remained the same as last year. This is the first year since 2014 when the share of services with vacant places has not decreased on the previous year (Figure 5.5).

It is **estimated that the total number of vacant places** nationally at the time of the survey was **12,444**. This represents an increase of 13% (1,423 places) on 2017/18, however is still 22% lower than the number of vacant places estimated to be available in 2016/17 (15,892).

Figure 5.5 Percentage of services with at least one vacant place between 2014 and 2018/19

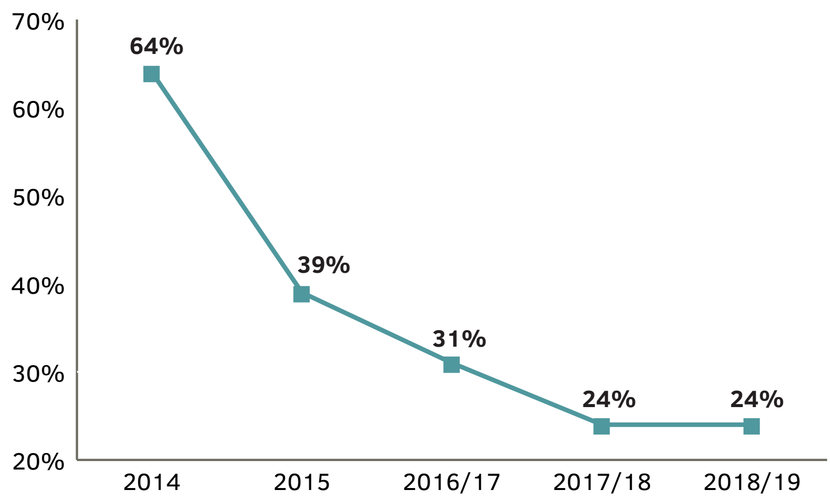


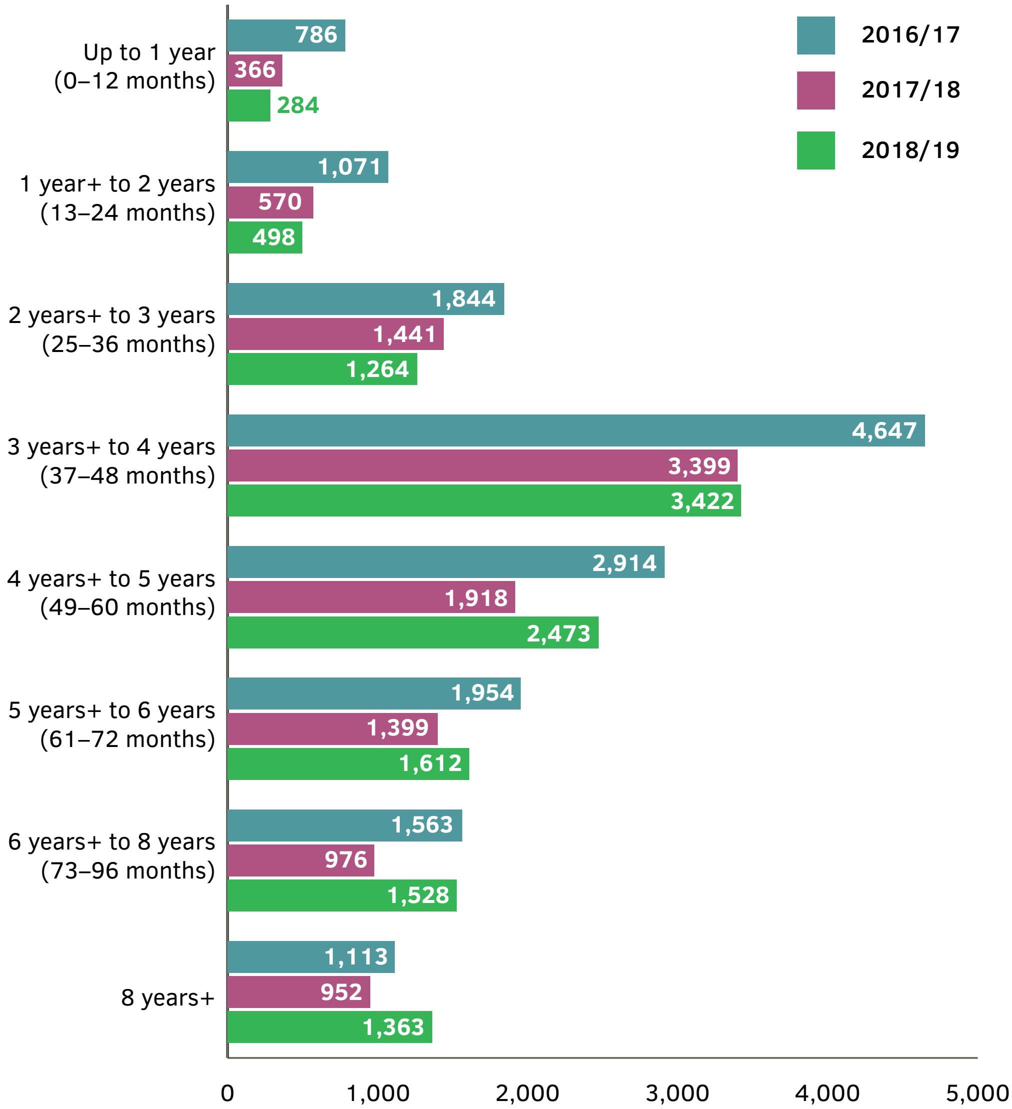
Table 5.10 presents the distribution of vacant places amongst different age groups. As in previous years, the highest proportion of vacant places was reported for the 3+ to 4 years age group (27%), following by the 4+ to 5 years (20%). These two groups together represent almost half of all vacant places (47%). This is to be expected as children aged 3+ to 5 years represent the largest cohort in ELC and SAC settings, constituting 55% of all children enrolled. This share of vacant places is similar to that recorded last year (48%). Babies have the smallest share in the overall number of vacant places, at 2%. Their share has decreased by 1% on the previous year, demonstrating that the availability of places for babies continues to decrease.

Table 5.10 Number and percentage of vacant places by age (reported and extrapolated figures)

Age range	Number of vacant places	% of all vacancies	Extrapolated number of vacancies nationally
Up to 1 year (0-12 months)	245	2%	284
1 year+ to 2 years (13-24 months)	430	4%	498
2 years+ to 3 years (25-36 months)	1,090	10%	1,264
3 years+ to 4 years (37-48 months)	2,952	27%	3,422
4 years+ to 5 years (49-60 months)	2,133	20%	2,473
5 years+ to 6 years (61-72 months)	1,391	13%	1,612
6 years+ to 8 years (73-96 months)	1,318	12%	1,528
8 years+	1,176	11%	1,363
Total	**10,735**	**100%**	**12,444**

Figure 5.6 shows the change in the extrapolated number of vacant places for each age range over the last three years. In that period, the number of vacant places for babies decreased from 786 in 2016/17 to 284 this year (64%) and for children aged 1+ to 2 years by 54%. The number of vacant places for children aged 2+ to 3 years has also decreased but on a smaller scale, by 31%. The overall increase in the number of vacant places observed this year resulted from the growth in the vacant places for children aged 4 years+ on 2017/18. This is likely to be the result of the investment made over the last few years under the School-Age Childcare Capital programme. In comparison, in 2017/18, the number of vacant places decreased across all age groups on 2016/17.

Figure 5.6 Change in number of vacant places (extrapolated) by age range between 2016/17 and 2018/19



The vacancy rate is calculated by dividing the number of vacant places by the number of children enrolled. With 177,970 children enrolled and 10,735 vacant places reported by services nationally, the vacancy rate in 2018/19 was 6%, a percentage point higher than in the previous year but 3% lower than in 2016/17. The decline in the number of vacant places for children aged up to 3 years corresponds with the decrease in the vacancy rate for this age cohort (by 2% for babies and by 1% for children aged 1 year to 3 years). The vacancy rates for all age groups above 3 years have risen, with the highest increase recorded for children aged 6+ to 8 years, from 6% in 2017/18 to 9% this year. Table 5.11 presents the vacancy rates by age alongside the numbers of children enrolled and vacant places.

Table 5.11 Number of vacant places as a percentage of number of children enrolled (by age range)

Age range	Children enrolled	Vacant places	Vacancy rate
Up to 1 year (0-12 months)	2,991	245	8%
1 year+ to 2 years (13-24 months)	10,895	430	4%
2 years+ to 3 years (25-36 months)	19,515	1,090	6%
3 years+ to 6 years (37-72 months)	114,228	6,476	6%
6 years+ to 8 years (73-96 months)	15,315	1,318	9%
8 years+	15,026	1,176	8%
Total	**177,970**	**10,735**	**6%**

Table 5.12 shows the vacancy rates based on extrapolated number of places and the total population of children for each age group up to the age of 6. The vacancy rates for children aged up to 3 years has decreased (0.1% on previous year for children aged up to 2 years and 0.2% for those aged 2+ to 3 years) while the vacancy rates for older children have increased, with the highest increase of 1%, from 2.7% last year to 3.7% in 2018/19, recorded for children aged 4+ to 5 years.

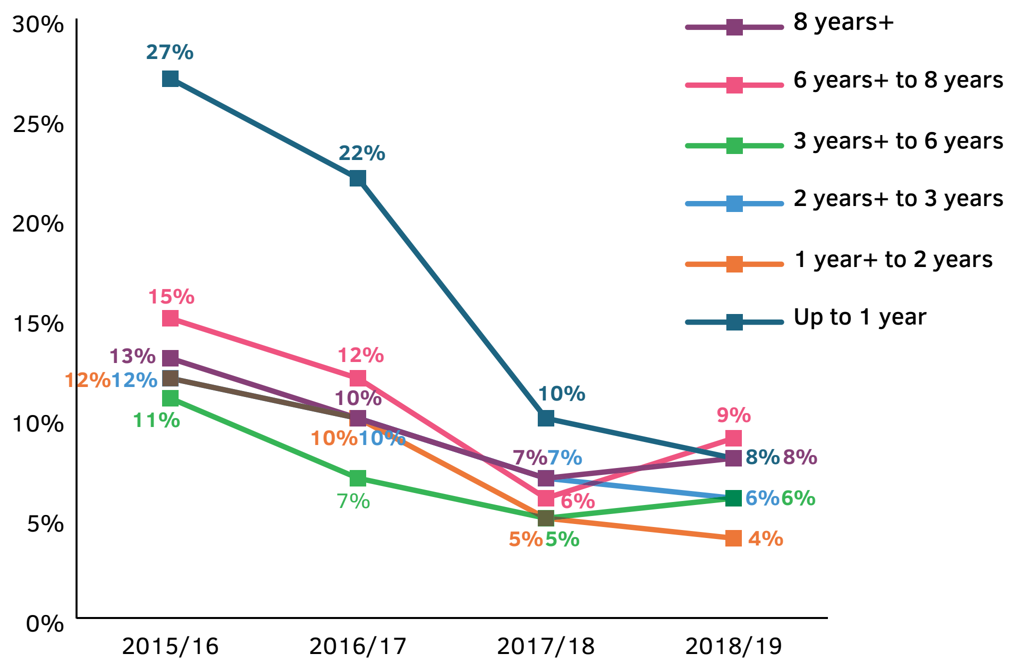
Table 5.12 Number of vacant places (reported and extrapolated) and vacancy rates as percentage of estimated national population by age (up to age of 6)

Age range	Number of vacant places	Extrapolated number of vacant places nationally	Estimated number of children[30]	Vacancy rate (as % of children)
Up to 1 year	245	284	61,016	0.5%
1 year+ to 2 years	430	498	62,053	0.8%
2 years+ to 3 years	1,090	1,264	63,841	2.0%
3 years+ to 4 years	2,952	3,422	65,536	5.2%
4 years+ to 5 years	2,133	2,473	67,295	3.7%
5 years+ to 6 years	1,391	1,612	68,954	2.3%
Total	**8,241**	**9,553**	**388,695**	**2.5%**

Figure 5.7 shows the change in the vacancy rates over the last four years. A decrease in the vacancy rates for children up to 3 years has been observed over the period of the last four years. The highest decrease is for babies from 27% in 2015/16 to 8% this year. The vacancy rates for children aged 3 years and over increased this year for the first time since 2015/16, however, these increases were small and have not matched the vacancy rates of 2016/17.

30 These figures represent number of births. To estimate the population of children up to 1 year, the number of births in 2018 was used, 2017 births numbers were used for 1 year+ to 2 years and so on.

Figure 5.7 Change in vacancy rates by age 2015/16–2018/19



The majority of vacant places were in private services (71%), with the remaining 29% in community services. The vacancy rates in private services are slightly higher than those in the community (6.2% and 5.7%, respectively). Compared to the previous year, the share of vacant places in community services decreased by 2 percentage points (from 31% in 2017/18). When looking at geographical distribution, 55% of vacant places were in settings located in urban areas and 45% in rural services. The settings in rural areas had a higher vacancy rate of 9%, compared to 5% of those in urban areas. When compared to the previous year, the share of vacant places in urban services decreased from 57% in 2017/18 to 55% this year. The detailed breakdown of the number of vacant places by age range and the type and location of service is presented in Table 5.13.

Table 5.13 Number of vacant places by age range, organisation type and urban/rural location

Age range	Community	Private	Urban	Rural	Total
Up to 1 year (0-12 months)	56	189	181	64	245
1 year+ to 2 years (13-24 months)	144	286	302	128	430
2 years+ to 3 years (25-36 months)	351	739	620	470	1,090
3 years+ to 4 years (37-48 months)	864	2,088	1,772	1,180	2,952
4 years+ to 5 years (49-60 months)	723	1,410	1,265	868	2,133
5 years+ to 6 years (61-72 months)	379	1,012	732	659	1,391
6 years+ to 8 years (73-96 months)	312	1,006	566	752	1,318
8 years+	337	839	516	660	1,176
Total number of vacant places	**3,166**	**7,569**	**5,954**	**4,781**	**10,735**
As a % of all vacant places	**29%**	**71%**	**55%**	**45%**	**n/a**

Table 5.14 presents the vacancy rates at county level. While national vacancy rates increased slightly (by 1%), the gap in provision between different areas of the country widened. The highest vacancy rates were recorded for Laois (12%), Donegal (12%) and Carlow (10%), indicating that for every ten children enrolled there is one place available. While the vacancy rates of services in Donegal decreased by 1% on the previous year, significant increases were observed for Carlow, from 3% last year to 10% in 2018/19 and Laois, from 8% to 12% in the same period. The lowest vacancy rate was 2%, a percentage point lower than the lowest vacancy rates recorded last year. This was recorded in Dún Laoghaire-Rathdown and Longford. In both counties the vacancy rates last year were at 4%. In 2018/19, 13 counties had a vacancy rate of 5% or less compared to 20 counties last year, indicating that the availability of places is slightly improving across the country.

Table 5.14 County breakdown of number of vacant places as a percentage of children enrolled

County	Children enrolled	Vacant places	Vacancy rate
Dublin – Dún Laoghaire-Rathdown	7,023	173	2%
Longford	1,749	38	2%
Kilkenny	3,923	110	3%
Roscommon	2,766	77	3%
Cork City	4,252	183	4%
Dublin - Dublin City	16,105	627	4%
Waterford	4,537	186	4%
Cavan	3,380	156	5%
Dublin – Fingal	11,142	536	5%
Dublin – South Dublin	9,318	424	5%
Kerry	5,506	286	5%
Offaly	2,845	134	5%
Wexford	5,708	286	5%
Kildare	9,215	516	6%
Leitrim	1,557	97	6%
Limerick	7,499	421	6%
Sligo	3,482	205	6%
Tipperary	6,776	431	6%
Cork County	15,390	1,021	7%
Galway	10,679	749	7%
Louth	4,837	327	7%
Monaghan	3,818	250	7%
Wicklow	4,551	298	7%
Clare	4,403	395	9%
Mayo	4,138	362	9%
Meath	7,297	679	9%
Westmeath	3,505	330	9%
Carlow	2,377	231	10%
Donegal	7,030	829	12%
Laois	3,162	378	12%
Total	**177,970**	**10,735**	**6%**

Figure 5.8 County vacancy rates between 2015/16 and 2018/19

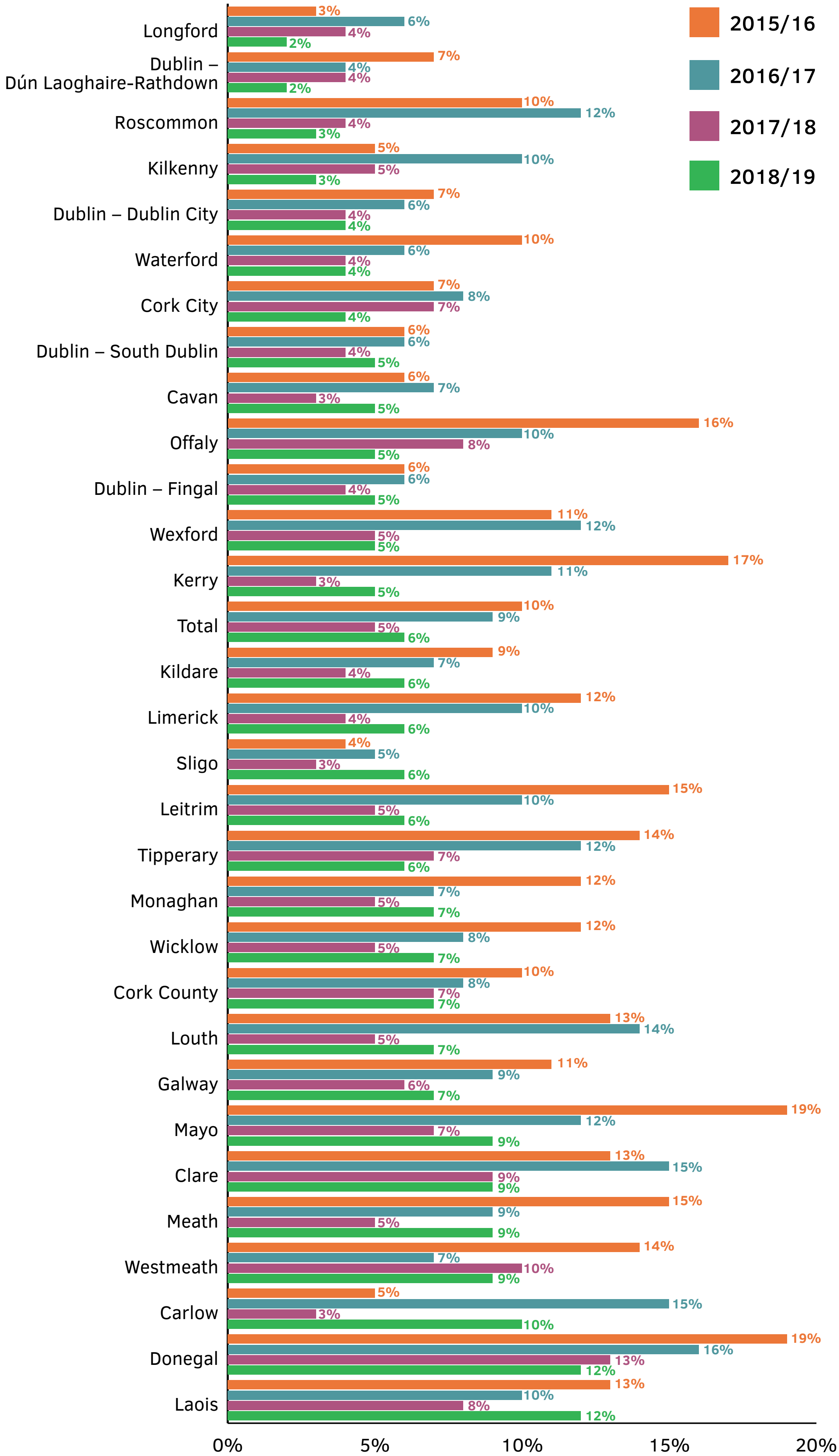


Figure 5.8 shows the changes in the vacancy rates at county level over the last four years. There were fluctuations in the vacancy rates in most of the counties during this period. In six counties (Cork County, Donegal, Dún Laoghaire-Rathdown, Offaly, Tipperary and Waterford) the vacancy rates have been steadily decreasing over the last four years. In 19 counties, an increase in vacancy rates was observed between 2017/18 and this year. Please note that the trends shown in Figure 5.8 may have been affected by the response rates at county level, and therefore, should be treated as indicative rather than actual.

The breakdown of vacant places by service type offered is presented in Table 5.15. The highest share of vacant places was available for sessional care (44%), followed by school-age childcare (21%). This corresponds with the trends observed for vacant places by age range, where the highest proportion of vacant places was for children aged 3+ to 5 years (47%), who are most likely to avail of sessional care, as part of the ECCE programme. Just under a quarter of vacant places are available to children aged 6 years and over (23%), who avail of school-age childcare.

The majority of vacant places by service type were in private facilities (71%), with 29% being available in community settings. This breakdown is the same as for vacant places by age group (Table 5.6) and close to the breakdown of children enrolled by service type, where 31% of children were enrolled in community services and 69% in private settings (see Table 5.9). There are proportionally more vacant places in services in rural areas than urban ones. Rural services account for 42% of all vacant places, but have only 31% of enrolments by service type, while the corresponding figures for urban services are 58% (vacant places) and 69% (enrolments) (see Table 5.9).

Table 5.15 Number of vacant places by service type offered

Service type	Community	Private	Urban	Rural	Total	% of service type
Breakfast club	489	1,643	1,051	1,081	2,132	11%
Drop-in	38	208	90	156	246	1%
Full day care	492	1,618	1,472	638	2,110	11%
Part-time care	888	1,451	1,397	942	2,339	12%
School-age childcare (after-school)	1,208	2,938	2,183	1,963	4,146	21%
Sessional	2,485	6,100	5,186	3,399	8,585	44%
Total number of vacant places	**5,600**	**13,958**	**11,379**	**8,179**	**19,558**	**100%**
% of vacant places	**29%**	**71%**	**58%**	**42%**	**n/a**	**n/a**

5.4 Waiting lists

Services were asked to provide the number of children on a waiting list by age range and service type. **The number of children on waiting lists is an indication of demand, however, as parents often place their child/children on multiple lists, this figure cannot be used to measure actual demand.**

In 2018/19 services reported **20,003 children on waiting lists** by age. When extrapolated, this figure could be as high as **23,187** nationally. Compared to last year, the overall number of children on waiting lists increased by 41%.

Figure 5.9 presents the age breakdown of children on waiting lists. Just over half of children on waiting lists (51%) are those aged 3 years or younger. Their share on waiting lists increased by 2% on the previous year and by 7% on 2016/17. Children aged 3+ to 4 years are the largest cohort on waiting lists and represent 22% of all children, however, their share has decreased by 5% on the previous year.

Figure 5.9 Age breakdown of children on waiting lists

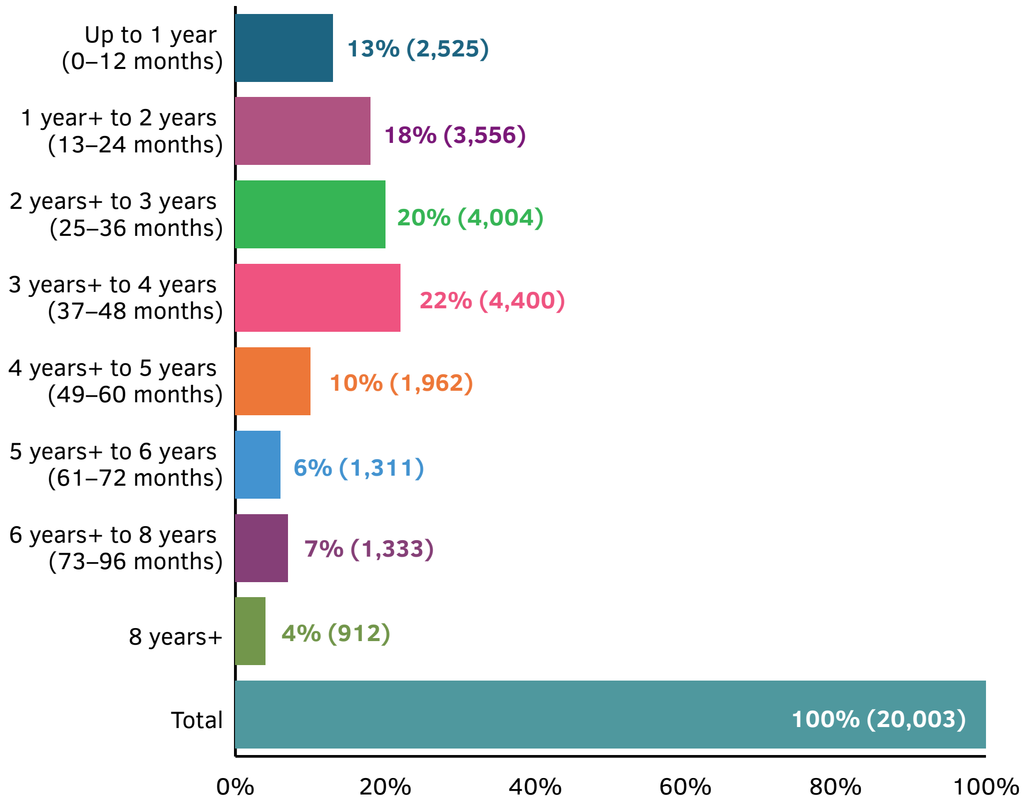


Figure 5.10 shows the change in the proportion of different age groups of children on waiting lists over the last three years. The share of babies (up to 1 year), children aged 1+ to 3 years and those aged 8 years+ on waiting lists has increased between 2016/17 and 2018/19. **Year on year increases of children on waiting lists up to 3 years old combined with the decrease in the proportion of vacant places for this age cohort indicates that the demand for places for this age cohort is not being met and continues to grow.** While the share of the eldest children on waiting lists (8 years+) has also increased over the last three years, the vacancy rate for this age group has grown compared to last year. This would suggest that the increase on waiting lists for this age group is more likely an effect of geographical mismatch in the supply and demand for places, rather than growing national demand.

There was a significant decrease in the proportion of children on waiting lists aged 3+ to 5 years (ECCE eligible children). Their share decreased from 42% two years ago to 32% in 2018/19. This would suggest that the supply of places for children in this age cohort is better matching the demand and, with the exception of some pockets of insufficient supply, the demand for pre-school places is being met. This change can also be driven by a decreasing number of children in this age cohort requiring a place as a result of demographic changes.

Figure 5.10 Age breakdown of children on waiting lists between 2016/17 to 2018/19

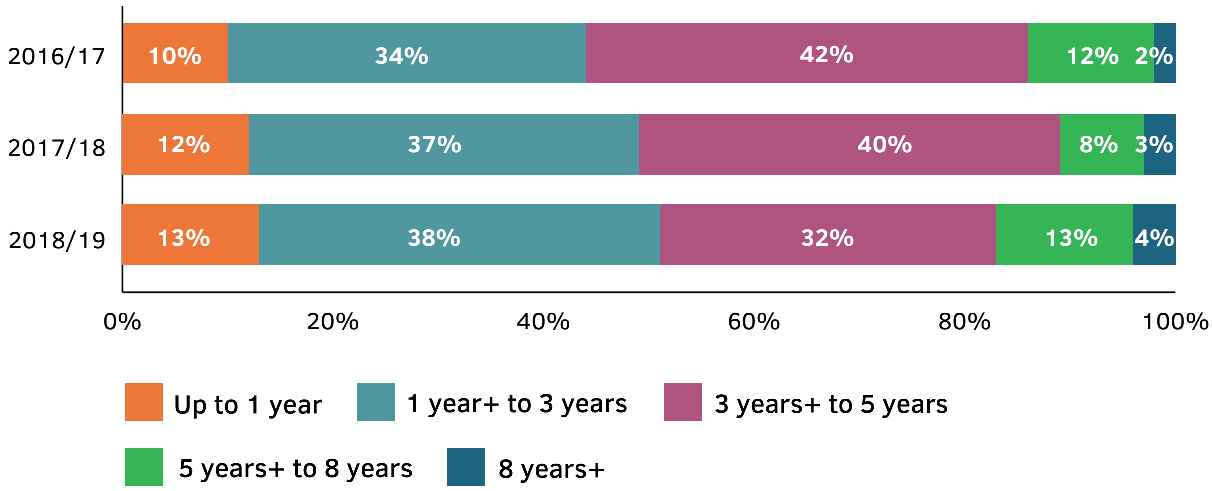


Table 5.16 compares the numbers of children on waiting lists with the numbers enrolled by age range. While nationally, for every ten children enrolled, there is approximately one on a waiting list, these proportions are much higher for children younger than three years. The demand for baby places is the highest – for every ten babies enrolled in services there is over eight placed on a waiting list (84%). In comparison, last year, this figure was almost six (58%).

Table 5.16 Children on waiting lists relative to enrolments by age range

Age range	Number on waiting lists	Number of children enrolled	No. on waiting lists as % of children enrolled
Up to 1 year (0-12 months)	2,525	2,991	84%
1 year+ to 2 years (13-24 months)	3,556	10,895	33%
2 years+ to 3 years (25-36 months)	4,004	19,515	21%
3 years+ to 4 years (37-48 months)	4,400	49,957	9%
4 years+ to 5 years (49-60 months)	1,962	48,234	4%
5 years+ to 6 years (61-72 months)	1,311	16,037	8%
6 years+ to 8 years (73-96 months)	1,333	15,315	9%
8 years+	912	15,026	6%
Total	**20,003**	**177,970**	**11%**

The distribution of children on waiting lists varies depending on the organisation type. Table 5.17 presents the breakdown of children on waiting lists by age range and organisation type. The majority of children waiting on a place are in private facilities (62%). However, the greater overall demand for places is for those in community services (38%), when compared to enrolments (31%). The exceptions are babies and children aged 4+ to 6 years, for whom the distribution of children on waiting lists is similar to enrolments.

Table 5.17 Number and percentage of children on a waiting list (by age range) by organisation type

Age range	Community	Private	Community %	Private %	Total
Up to 1 year (0-12 months)	812	1,713	32%	68%	**2,525**
1 year+ to 2 years (13-24 months)	1,464	2,092	41%	59%	**3,556**
2 years+ to 3 years (25-36 months)	1,708	2,296	43%	57%	**4,004**
3 years+ to 4 years (37-48 months)	1,741	2,659	40%	60%	**4,400**
4 years+ to 5 years (49-60 months)	614	1,348	31%	69%	**1,962**
5 years+ to 6 years (61-72 months)	404	907	31%	69%	**1,311**
6 years+ to 8 years (73-96 months)	539	794	40%	60%	**1,333**
8 years+	366	546	40%	60%	**912**
Total	**7,648**	**12,355**	**38%**	**62%**	**20,003**

Table 5.18 shows the breakdown of children on waiting lists by age and location of services (urban/rural). The vast majority of children on waiting lists are in services in urban locations (83%), which is significantly higher than the number of enrolments in the same facilities (69%, see Table 5.7). There are also differences between different age ranges. The demand in urban areas is noticeably above the average of 83% for places for children aged 6 years+ (87%) and 3+ to 4 years (86%).

Table 5.18 Number and percentage of children on a waiting list (by age range) by urban/rural location

Age range	Urban	Rural	Urban %	Rural %	Total
Up to 1 year (0–12 months)	1,948	577	77%	23%	**2,525**
1 year+ to 2 years (13–24 months)	2,950	606	83%	17%	**3,556**
2 years+ to 3 years (25–36 months)	3,361	643	84%	16%	**4,004**
3 years+ to 4 years (37–48 months)	3,782	618	86%	14%	**4,400**
4 years+ to 5 years (49–60 months)	1,607	355	82%	18%	**1,962**
5 years+ to 6 years (61–72 months)	1,021	290	78%	22%	**1,311**
6 years+ to 8 years (73–96 months)	1,146	187	86%	14%	**1,333**
8 years+	807	105	88%	12%	**912**
Total	**16,622**	**3,381**	**83%**	**17%**	**20,003**

Appendix I presents children enrolled, on waiting lists and vacant places by county. Generally, the more urbanised counties continue to have the highest numbers of children on waiting lists. In Cork City, Dublin City and Waterford, the share of children on waiting lists is double the proportion of children enrolled in these counties. This suggests that a high level of unmet demand exists in these locations.

The total number of children on waiting lists by service type was 24,959 (see Figure 5.11 for a detailed breakdown). Just over one third of children (34%) were waiting for a full day place, an increase of 4% from last year. This was followed by sessional a.m., at 24%, part-time (19%) and school-age childcare (17%). Compared to the previous year, the demand for sessional a.m. and part-time places has decreased, by 6% and 2%, respectively, while the number of children waiting for a place in school-age childcare grew by 5%.

Figure 5.11 Number and percentage of children on waiting lists by session type

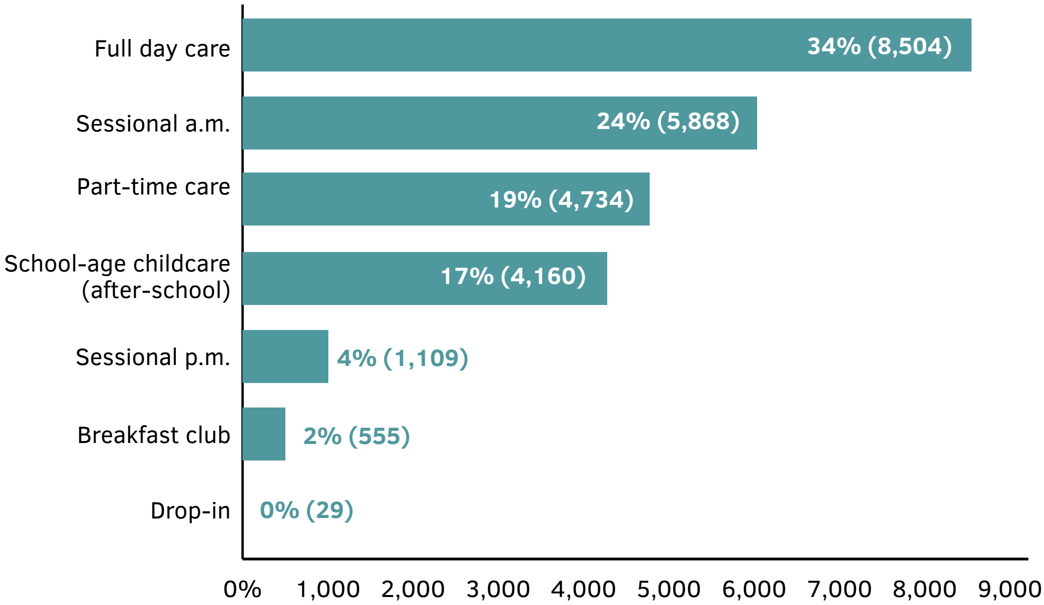


Table 5.19 compares the number of vacant places with the number of children on a waiting list by service type. The demand for full day places has been growing. In 2018/19, there were four times more children waiting for a full day place (8,504) than there were vacant places (2,110). In comparison, last year there were twice more children on waiting lists (5,495) than vacant places (2,514). The demand is also higher than supply for part-time places – with 4,734 children on waiting lists compared to 2,339 vacant places. The similar number of vacant places to the number of children on waiting lists for sessional a.m. and school-age childcare indicates a mismatch in the local supply and demand rather than an actual demand for these type of places.

Table 5.19 Number and percentage of vacant places and children on waiting list by service type

Service type	Vacant places	Waiting list	Vacant places %	Waiting list %
Full day care	2,110	8,504	10.8%	34.1%
Sessional a.m.	5,352	5,868	27.3%	23.5%
Part-time care	2,339	4,734	12%	19%
School-age childcare (after-school)	4,146	4,160	21.2%	16.7%
Sessional p.m.	3,233	1,109	16.5%	4.4%
Breakfast club	2,132	555	10.9%	2.2%
Drop-in	246	29	1.3%	0.1%
Total	**19,558**	**24,959**	**100.00%**	**100.00%**

5.5 Capacity

Analysis of capacity is vital for informing the planning and management of provision in the ELC and SAC sector. This section analyses the capacity of the sector using figures reported by the services on the number of children enrolled and vacant places (capacity is the sum of children enrolled and vacant places). The overall **reported capacity** of the sector in 2018/19 was **188,705** and the **estimated overall capacity nationally was 218,745**. This represents an increase of 2% or 5,091 places on the previous year. The level of increase in capacity is the same as for the number of children enrolled (2%, see section 5.2), indicating that the number of vacant places remained relatively unchanged. This combined with the increase in the numbers on waiting lists could mean that the sector is saturated, and it is unlikely to grow without additional places being created.

Table 5.20 compares the extrapolated capacity by age range in 2017/18 and 2018/19. The majority of places were for children aged 3+ to 5 years (55% or 119,717). The age group with the smallest capacity are babies, with 2% of all places (3,751). Compared to the previous year, the number of places for children in the majority of age ranges have increased, with the exception of two groups: up to 1 year and 3+ to 4 years. The largest increase was recorded for the number of places for children over 8 years of age – 3,492 places or 23%.

Table 5.20 Extrapolated capacity by age range in 2017/18 and 2018/19

	2017/18		2018/19	
Age group	**Capacity**	**%**	**Capacity**	**%**
Up to 1 year (0-12 months)	4,003	2%	3,751	2%
1 year+ to 2 years (13-24 months)	12,591	6%	13,127	6%
2 years+ to 3 years (25-36 months)	22,558	11%	23,886	11%
3 years+ to 4 years (37-48 months)	67,556	32%	61,332	28%
4 years+ to 5 years (49-60 months)	57,437	27%	58,385	27%
5 years+ to 6 years (61-72 months)	17,992	8%	20,202	9%
6 years+ to 8 years (73-96 months)	16,228	8%	19,281	9%
8 years+	15,289	7%	18,781	9%
Total	**213,654**	**100%**	**218,745**	**100%**

The capacity of services differs across the country. Table 5.21 presents the capacity of services that responded to the survey at the county level and their share in the overall national capacity. The capacity of services at county level is linked to the size of the population residing in a given county. The highest share in the national capacity, at 9%, was in Dublin City and Cork County, while the lowest, at 1%, was in the smallest counties in Ireland – Leitrim, Longford and Carlow. This is in line with the distribution of the population nationally.

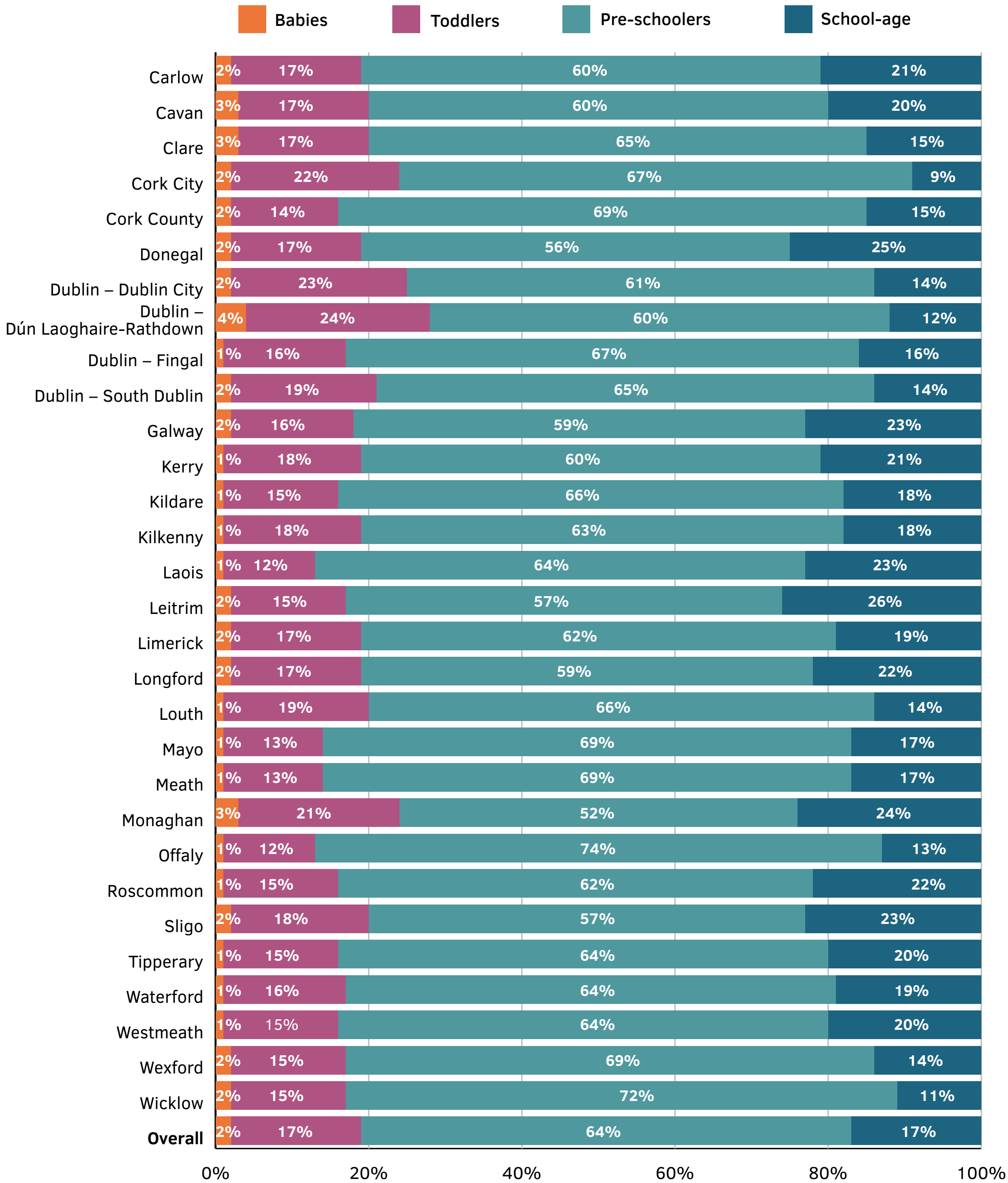
Table 5.21 Capacity by county (reported)

County	Capacity (enrolled and vacant places)	% of overall national capacity (enrolled and vacant places)
Dublin – Dublin City	16,732	9%
Cork County	16,411	9%
Dublin – Fingal	11,678	6%
Galway	11,428	6%
Dublin – South Dublin	9,742	5%
Kildare	9,731	5%
Meath	7,976	4%
Limerick	7,920	4%
Donegal	7,859	4%
Tipperary	7,207	4%
Dublin – Dún Laoghaire-Rathdown	7,196	4%
Wexford	5,994	3%
Kerry	5,792	3%
Louth	5,164	3%
Wicklow	4,849	3%
Clare	4,798	3%
Waterford	4,723	3%
Mayo	4,500	2%
Cork City	4,435	2%
Monaghan	4,068	2%
Kilkenny	4,033	2%
Westmeath	3,835	2%
Sligo	3,687	2%
Laois	3,540	2%
Cavan	3,536	2%
Offaly	2,979	2%
Roscommon	2,843	2%
Carlow	2,608	1%
Longford	1,787	1%
Leitrim	1,654	1%
Total	**188,705**	**100%**

Figure 5.12 shows the distribution of capacity within services in a given county by stage in childhood. Nationally, the majority of places (enrolled and vacant places together) in ELC and SAC services are for pre-schoolers (64%), followed by school-age children and toddlers (17% each), and babies (2%). This distribution varies between counties. Overall, the proportion of places for babies and toddlers is higher in more urbanised counties, while the share of places for school-age childcare is higher in rural locations.

The highest proportion of places for pre-schoolers was recorded in Offaly (74%) and Wicklow (72%), while the lowest was in Monaghan (52%). The largest share of places for toddlers was in services in three urban locations – Dún Laoghaire-Rathdown (24%), Dublin City (23%), Cork City (22%) and Monaghan (21%), while the lowest was in Laois and Offaly (12% each). Every fourth place in Leitrim (26%), Donegal (25%) and Monaghan (24%) were for children of school-age, with Cork City having only less than one in ten places for children of school-age. The share of places for babies was above the national level in Dún Laoghaire-Rathdown (4%), Cavan, Clare and Monaghan (3% each). In 13 counties this share was 1%, with Kilkenny, Louth and Laois having the lowest share of baby places for children under 1 year old in the country (<1%).

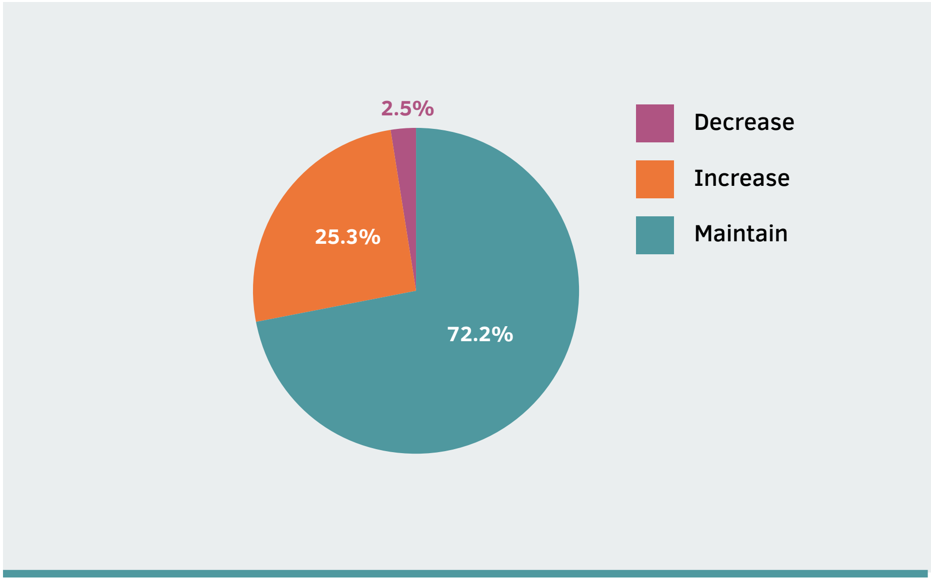
Figure 5.12 Capacity by stage of childhood



Services were asked about their plans in regard to changing the existing capacity within their settings. Figure 5.13 shows the plans of services in regard to changing the number of places. The majority of services (72.2%) responded that they plan to maintain the current number of places. A quarter of services responded that they plan to increase the number of places, a decrease of 1.1% on 2017/18. A very small share of services (2.5%) were planning to reduce their capacity.

The 966 respondents who indicated a planned increase in the number of places they offer would together provide an additional 12,937 places, if the plans were realised. When extrapolated this figure would be 14,996, a 5% decrease on the previous year, when the number of estimated planned new places was 15,796. The total number of places that the sector would lose if the decreases planned by 95 services would be realised is 1,178. If extrapolated that figure would be 1,366. Based on this, it could be expected that the net gain in the number of places nationally next year would be 13,631 and the total capacity of the sector could increase up to 232,376 places.

Figure 5.13 Services' plans regarding the change in the number of places



6 Childcare fees

Childcare fees

The average weekly cost of full day childcare was

€184

an increase of €6
from the previous year

The most expensive fees are generally charged for **babies up to 1 year old**

€143

the average fee for out of term school-age childcare per week

Fees are higher in urban areas and in private services

33%

the difference in average full-day fees between affluent and disadvantaged areas

€5.24

the average hourly fee for school-age childcare in term

6.1 Introduction

This chapter provides an analysis of fees for different service types by age of children. Please note that this year's report presents, for the first time, the breakdown of fees not only by service type but also by the age of the children availing of services. As in previous years, the report examines the factors influencing fees, which include geography (service location), organisation type (community/private), levels of affluence/deprivation of the area where the service is located and staff qualifications.

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

This report also presents the analysis of data on school-age childcare fees (in term and out of term), which was collected for the first time this year by the service profile survey. The analysis of school-age childcare fees is presented in the section 6.8.

6.2 Overall national fees

In previous years, survey respondents provided the average fee they charge across different ages. However, this year they provided individual fees for each combination of age range and service type they offer, for example 1+ to 2 years full day, 3+ to 4 years sessional care, etc. This change in the data collection method meant that the way the average national fees were calculated for 2018/19 needed to be changed to ensure that average fees at national level are as closely comparable with previous years as possible. In the 2018/19 report, the median full day care, part-time and sessional fee for each service was used to calculate the national/county average[31].

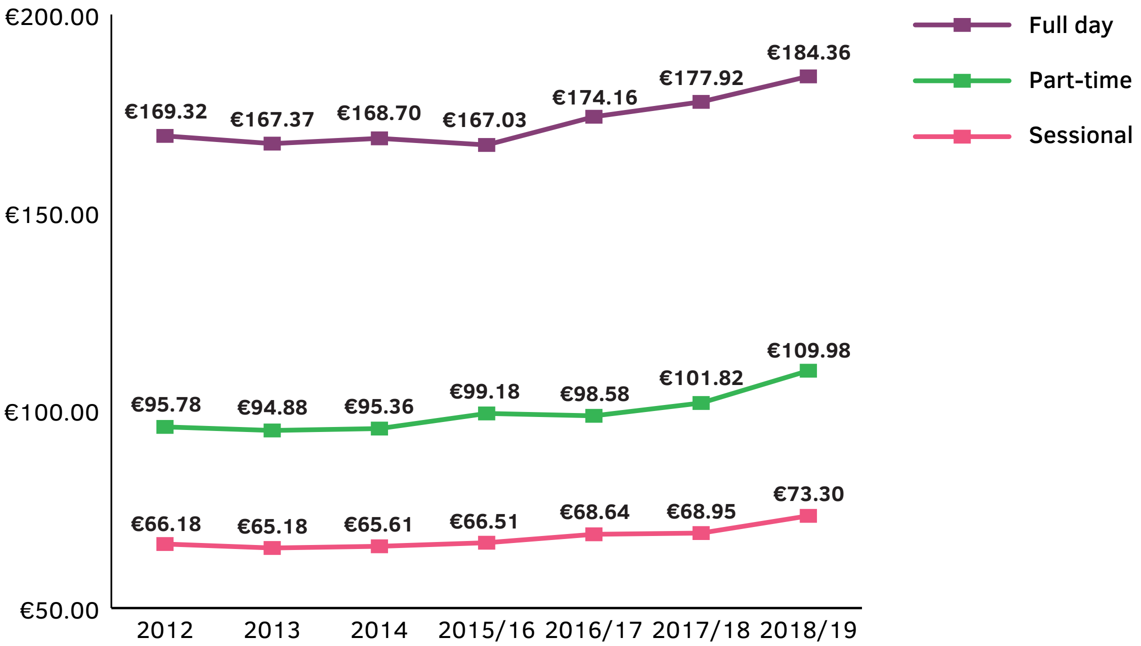
In 2018/19, **the average weekly fee nationally, per child, for full day provision was €184.36, for part-time care was €109.98 and for sessional childcare was €73.30**. The fees for all types of provision increased compared to 2017/18. The average weekly fee for full day provision increased by €6.44 or 3.6%. More significant rises in average fees were recorded for part-time and sessional fees, which increased by €8.16 or 8% and €4.35 or 6.3%, respectively. The level of change in average fees since last year is shown in Table 6.1, while Figure 6.1 presents the change in fees over the last seven years.

31 For example, if a service provided six different fees for full-time care (one for each age group), the median of these fees has been used to calculate the national/county average.

Table 6.1 The level of change in weekly fees between 2017/18 and 2018/19

	2017/18	2018/19	Change since 2017/18
Full day care	€177.92	€184.36	3.6%
Part-time care	€101.82	€109.98	8.0%
Sessional	€68.95	€73.30	6.3%

Figure 6.1 Average weekly childcare fees since 2012 by type of childcare provision



The average weekly fees for different types of provision vary depending on the age of the children. The amount of fees decreases as the child gets older, both for full day and part-time provision. The most expensive fees charged are for babies, up to 1 year old (€195.51 for full day and €122.33 for part-time care), while provision for children aged between 5+ to 6 years is the cheapest at €169.64 for full day and €105.50 for part-time. The average sessional fees follow a different pattern. While sessional fees are also the highest for babies (up to 1 year old) at €81.20, the lowest average fees charged are for children aged 4+ to 5 years, at €73.03. The detailed breakdown of fees by age group is presented in Table 6.2.

Table 6.2 Average weekly childcare fees by age range of children and type of provision

	Full day	Part-time	Sessional
Up to 1 year	€195.51	€122.33	€81.20
1 year+ to 2 years	€189.68	€116.83	€79.16
2 years+ to 3 years	€186.01	€112.97	€74.92
3 years+ to 4 years	€184.39	€110.48	€73.14
4 years+ to 5 years	€183.43	€109.73	€73.03
5 years+ to 6 years	€169.64	€105.50	€73.49

6.3 Fees by location

The level of fees charged by services depends on where the service is located. The differences are observed between the counties and also within the counties depending on the level of affluence of the local area where the service is located (see section 6.5 for details). Historically, the fees are higher in urban areas and also on the Eastern coast.

Table 6.3 presents average fees for full day, part-time and sessional provision by county. As in previous years, the highest fees for all types of provision were charged by services in Dún Laoghaire-Rathdown, where the average fees in 2018/19 were €246.03 for full day provision, €133.26 for part-time care and €87.22 for sessional childcare. The differences between average fees charged in different counties are significant. The average weekly full day fees in Dún Laoghaire-Rathdown are 66% higher than the lowest recorded for Leitrim (€148.33). The part-time fees are 60% higher in Dún Laoghaire-Rathdown than in Monaghan, where these are the lowest, at €83.19. The most expensive sessional fees (Dún Laoghaire-Rathdown) are 36% higher than in Monaghan (€64.17). In comparison to last year, the difference at the county level between the highest and lowest fees has increased for full day average fees (59% in 2017/18), but decreased for part-time from 70% to 60% and for sessional from 44% to 36%.

A detailed breakdown of fees by age range and type of provision at county level can be found in Appendix III.

Table 6.3 Average weekly fee by county and type of provision (full day, part-time and sessional)

County	Full day	Part-time	Sessional
Dublin - Dún Laoghaire-Rathdown	€246.03	€133.26	€87.22
Dublin - South Dublin	€214.03	€130.48	€80.62
Dublin - Fingal	€212.73	€123.72	€76.83
Dublin - Dublin City	€207.40	€127.51	€78.24
Wicklow	€204.25	€120.00	€79.63
Kildare	€200.49	€121.55	€75.69
Cork County	€198.01	€121.98	€74.97
Cork City	€195.35	€108.87	€76.11
Meath	€182.72	€111.73	€73.17
Kerry	€175.69	€96.28	€64.93
Louth	€172.59	€108.46	€71.55
Westmeath	€169.02	€96.94	€71.45
Kilkenny	€168.25	€98.40	€69.59
Donegal	€167.41	€97.13	€65.31
Wexford	€166.94	€101.56	€72.31
Clare	€165.37	€94.62	€70.23
Offaly	€165.30	€106.69	€69.66
Laois	€163.23	€103.18	€71.95
Galway	€163.02	€106.05	€70.94
Waterford	€162.46	€98.50	€69.35

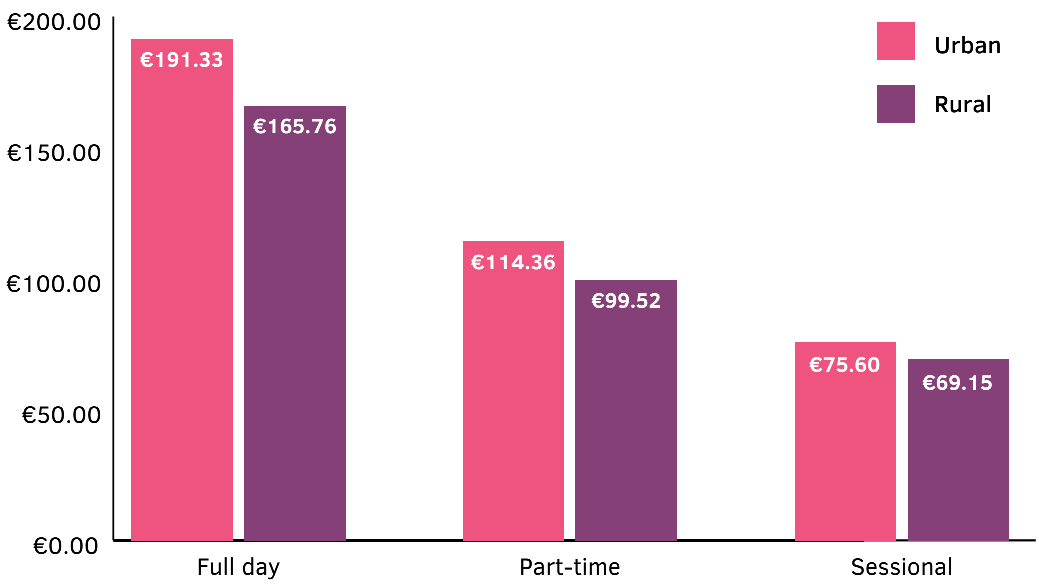
Cavan	€161.57	€93.92	€68.38
Limerick	€161.35	€97.52	€70.73
Mayo	€157.48	€97.19	€67.33
Sligo	€156.98	€97.41	€71.39
Tipperary	€156.97	€95.38	€69.35
Roscommon	€156.91	€90.38	€69.41
Longford	€155.77	€91.00	€67.66
Monaghan	€153.25	€83.19	€64.17
Carlow	€148.56	€91.75	€73.14
Leitrim	€148.33	€90.00	€67.39
Average overall	**€184.36**	**€109.98**	**€73.30**

The significant differences in average fees at county levels are even more visible within counties. For example, the highest median fee charged by a service in Dún Laoghaire-Rathdown was €300 while the lowest was €140. The highest part-time fee was charged in South Dublin (€208), however, the lowest part-time fee in the same county was €75.

Fees also differ between services located in urban and rural areas. Figure 6.2 presents the average fees charged by services depending on their urban/rural location. Across all types of provision, average fees are higher in services located in urban areas – 15% higher for full day and part-time provision and 9% higher for sessional provision.

In 2017/18, the fee increases in services located in rural areas were higher than those operating in urban areas. This year, services in urban areas increased their fees for full-time care by 3.6% on the previous year, compared to 2.7% increase recorded for rural services. The level of increases for part-time and sessional fees were slightly higher in rural services, by 0.4% for part-time care and 0.3% for sessional childcare provision.

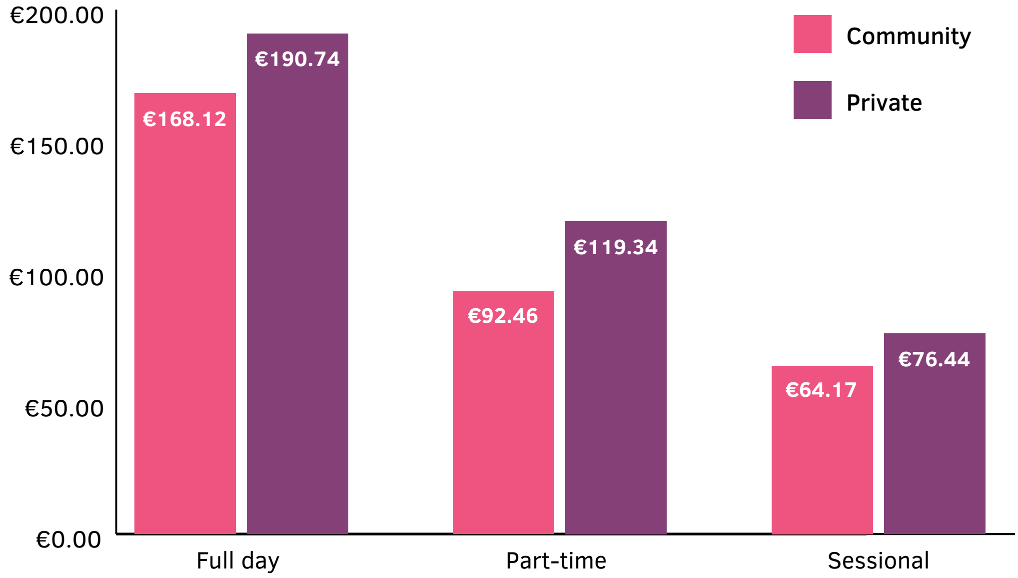
Figure 6.2 Average weekly fees for full day, part-time and sessional provision by urban/rural location



6.4 Fees by provider type

The average fees charged by private services are usually higher than those charged by community settings across all types of provision. Figure 6.3 compares average fees charged by community and private providers. Average weekly fees charged by private providers are 13% higher for full day, 29% higher for part-time and 19% higher for sessional provision. The gap in average fees charged by private and community services has slightly decreased for full day and part-time fees, by 1% and 2%, respectively.

Figure 6.3 Average weekly fees for full-time, part-time and sessional provision by organiation type



Compared to last year, the level of fee increases was higher for full day and part-time care provision amongst community providers. Particularly noticeable was the increase of part-time fees, which was 9.9% in community services compared to 8% recorded for private facilities (Table 6.4).

Table 6.4 Percentage change in fees by organisation type, 2017/18 to 2018/19

Facility type	Full day	Part-time	Sessional
Community	4.3%	9.9%	5.1%
Private	3.6%	8.0%	6.3%

Table 6.5 presents the average fees charged by community and private services by age range. As expected, the fees are higher for all age groups and across all types of provision in private services. The biggest gap in fees charged between private and community services was for part-time provision for children aged up to 1 year, where fees were 45% higher in private services. The smallest difference was around full day provision for 5+ to 6 years olds, where the fees charged were only 8% higher in private services.

Table 6.5 Average weekly fees by type of childcare provision, age range of children and organisation type

	Full day		Part-time		Sessional	
Age range	Community	Private	Community	Private	Community	Private
Up to 1 year	€172.20	€205.42	€95.27	€137.82	€65.39	€91.54
1 year+ to 2 years	€171.93	€196.92	€95.28	€128.50	€65.08	€87.42
2 years+ to 3 years	€170.17	€192.23	€94.03	€122.82	€64.82	€79.20
3 years+ to 4 years	€167.83	€191.02	€93.35	€119.29	€64.59	€75.96
4 years+ to 5 years	€167.19	€189.88	€92.32	€118.76	€63.94	€76.14
5 years+ to 6 years	€160.42	€173.40	€89.31	€114.15	€62.53	€78.42

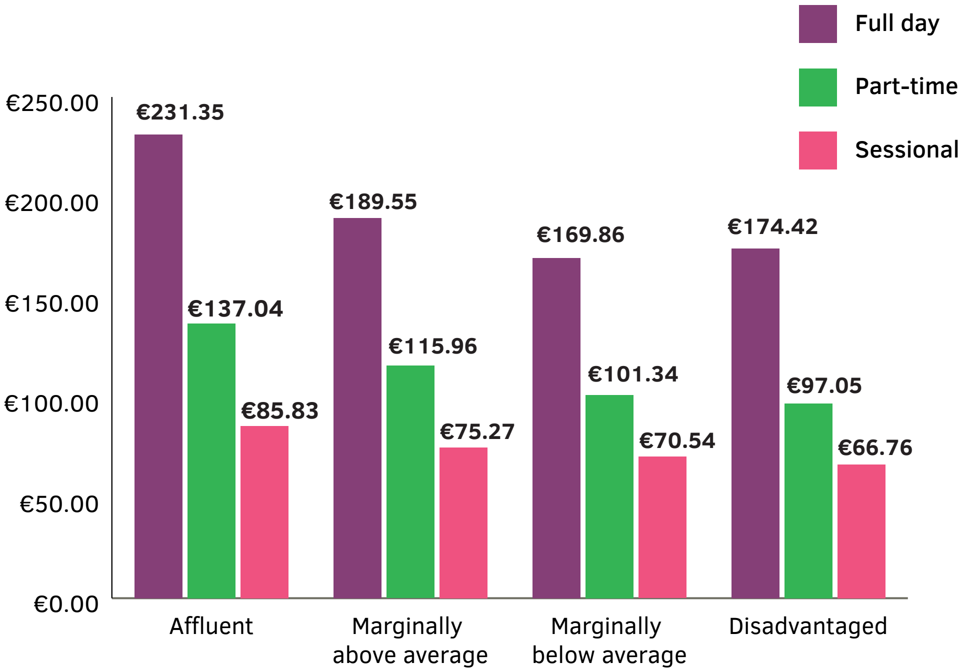
6.5 Fees by level of deprivation

The fees charged by services vary depending on the level of relative affluence/deprivation of the area where the service is located. Figure 6.4 presents average weekly full day, part-time and sessional fees by the level of affluence/deprivation of the area where the service is located. To determine these levels, the Pobal Haase-Pratschke Deprivation Index[32] was used. The index uses information from the Census of Population, such as employment, age profile and educational attainment, to calculate an affluence/deprivation score for an area. The location of each ELC/SAC service was assigned an HP Index score, based on the Electoral Division (ED) in which it is located. Scores were grouped on a spectrum from disadvantaged to affluent (based on bands).

Like in the previous years, overall services located in more affluent areas charged higher fees. The full day fees in affluent areas were 33% higher than those in the locations classified as disadvantaged. The part-time and sessional fees were 41% and 29% higher, respectively, in affluent areas when compared to disadvantaged locations.

32 https://www.pobal.ie/launch-of-2016-pobal-hp-deprivation-index/

Figure 6.4 Childcare fees for full-time, part-time and sessional provision, by relative affluence/deprivation[33] of the area in which the service is located



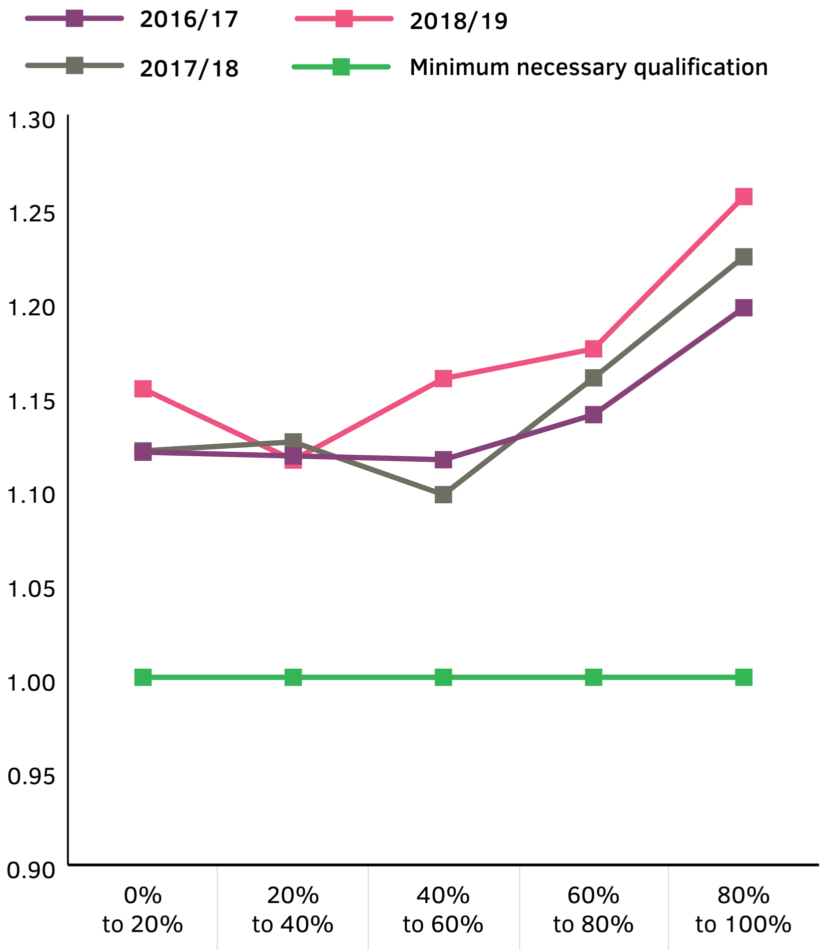
6.6 Fees by staff qualifications

An analysis was undertaken to investigate if fees are related to staff qualifications. This involved dividing services into five categories, based on the cost of full-time provision – ranging from the lowest 20% to the highest 20%. As each category had an equal number of services, no weightings were required. A scoring methodology was applied in order to take account of facilities having multiple staff with multiple qualifications. This involved assigning scores as follows: staff with no qualifications and those with qualifications below NFQ Level 5 were assigned a score of 0 (zero); those with NFQ Levels 5 and 6 were assigned a score of 1; and those with NFQ Levels 7 and above were assigned a score of 2. The same methodology was applied in 2017/18.

The findings, as presented in Figure 6.5, indicate a relationship between fees and staff qualifications. However, this relationship is present in respect of the 80% of services with the highest fees, i.e. the top three categories and the 20% charging the lowest fees. The 20% of facilities with the highest fees have the most qualified staff, and the 20% with the second highest tier of fees have the second most qualified staff. It can also be observed that the qualifications of staff in 20% services who charge the lowest fees and those in the middle quadrant have improved this year compared to the last two years.

33 While there are eight categories on the Pobal Haase-Pratschke Deprivation Index, four are shown here. This is because there are no ELC/SAC services located in EDs that register as very or extremely affluent on the index. The disadvantaged category includes services located in areas identified as disadvantaged, very disadvantaged and extremely disadvantaged who were grouped into one category due to small number of services located in very disadvantaged areas.

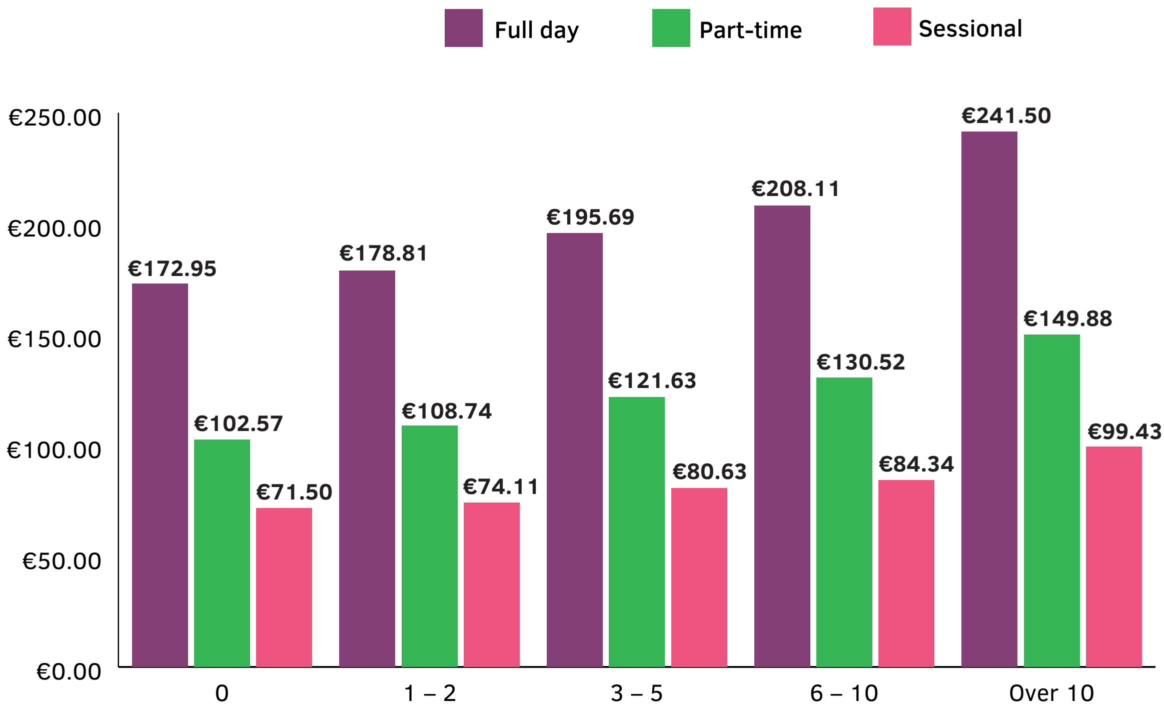
Figure 6.5 Qualification score of full-time staff working directly with children by quintile of service fees, between 2016/17 and 2018/19



6.7 Fees by the number of staff who left the service in the previous 12 months

Respondents in the 2018/19 service profile survey were asked to report on the number of staff who had left in the previous 12 months. Figure 6.6 presents the fees charged by full-time, part-time and sessional provision organised by the average number of staff who had left in the previous year. For the purpose of this graph, responses were categorised into five groups: 0 (no staff left), 1-2 staff left, 3-5 staff left, 6-10 staff left, and over 10 staff left. As evidenced by the data in Figure 6.6, average fees charged by services increased incrementally with the number of staff who left the service in the previous year. The difference in the average fees charged by services where no staff have left in the last year and those where more than 10 staff left in the same period was 40% for full day fees, 46% for part-time fees and 39% for sessional fees.

Figure 6.6 Number of staff that left in the last 12 months and average full-time, part-time and sessional fees



6.8 School-age childcare fees

The respondents in the 2018/19 service profile survey were asked whether they offer school-age childcare, both in term and out of term, and if so, they were asked to indicate fees they charge (hourly for in term and weekly for out of term). Table 6.6 presents the school-age childcare fees, for both in term and out of term, at county level. These are discussed in more detail in subsequent sections.

Table 6.6 School-age childcare fees by county

County	SAC in term average hourly fee	SAC out of term average weekly fee
Carlow	€4.93	€129.17
Cavan	€5.20	€153.65
Clare	€4.98	€144.74
Cork City	€5.66	€141.09
Cork County	€5.46	€165.47
Donegal	€4.98	€139.62
Dublin - Dublin City	€5.19	€149.80
Dublin - Dún Laoghaire-Rathdown	€6.58	€171.23
Dublin - Fingal	€5.89	€177.11
Dublin - South Dublin	€5.85	€152.70
Galway	€4.94	€145.65
Kerry	€4.93	€138.84
Kildare	€5.68	€161.32
Kilkenny	€5.29	€133.62
Laois	€4.99	€110.96

Leitrim	€4.64	€124.50
Limerick	€5.62	€123.52
Longford	€5.40	€112.69
Louth	€5.35	€133.85
Mayo	€4.89	€129.98
Meath	€5.73	€153.63
Monaghan	€4.67	€117.79
Offaly	€4.98	€124.69
Roscommon	€4.44	€147.00
Sligo	€5.38	€128.40
Tipperary	€4.71	€127.00
Waterford	€4.98	€119.77
Westmeath	€5.12	€136.11
Wexford	€4.49	€129.41
Wicklow	€4.94	€158.59
Average overall	**€5.24**	**€143.02**

6.8.1 School-age childcare fees: in term

The overall average hourly fee for school-age childcare in term was €5.24[34], while the median was €5 per hour. Like in the case of full day, part-time and sessional fees, school-age childcare fees in term were higher in private services (€5.46 per hour) than in community settings (€4.80) and in urban locations (€5.41) than rural ones (€4.97). The highest average fee of €5.92 was charged by services located in affluent areas, while services in disadvantaged areas charged on average €5.02 per hour. The highest average hourly fees for in term school-age childcare, similarly to pre-school age care, were in Dún Laoghaire-Rathdown, at €6.58 per hour, while the lowest fees were in Roscommon, at €4.44 per hour.

The majority of settings (69%) charged €5 or less, with 2% charging over €10 per hour. School-age childcare in term is much cheaper in rural areas, where eight out of ten services (80%) charged €5 or less per hour compared to six out of ten urban services (62%).

34 As part of the data cleaning process 28 records (value of €15 per hour) were excluded as top range outliers.

6.8.2 School-age childcare fees: out of term

The average weekly fee for school-age childcare out of term nationally was €143.02[35], while the median was €150. Like with all the other types of fees, school-age childcare out of term fees were higher in private services (€151.62) than community settings (€121.61), and in urban than rural areas (€144.78 and €139.74, respectively). However, while the difference between weekly fees in private and community services was €30 (25%), the gap between urban and rural services was only just over €5 (4%).

Similar to the trends observed in relation to pre-school age fees, there was a notable difference between out of term fees charged for school-age childcare depending on the affluence/deprivation levels of the area where service was located. On average, services in affluent areas charged almost €60 more per week (€170.81) than those in disadvantaged areas (€111.27).

The highest average weekly fees for out of term school-age childcare at county level were in Fingal (€177.04), while the lowest fees were in Laois (€110.96).

35 Data cleaning involved, first, excluding all fees that were largely distant from the median of the relevant ratios and, second, remodelling values that appeared to be daily values into weekly fees. The cleaned fees were then checked against those submitted by services in the 2017/18 service profile survey.

7 Staff

Staff

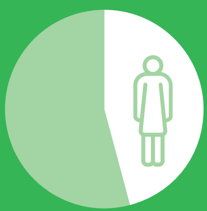
Early years assistants earn an average wage of

€11.46

per hour

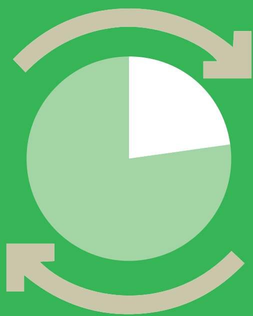
30,775

the estimated number of staff working in the ELC and SAC sector, **up 4%** on last year



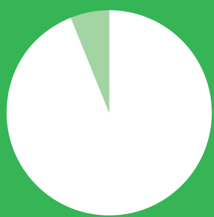
Almost half of staff work over 30 hours per week

(46%)



The annual staff turnover rate is

23%

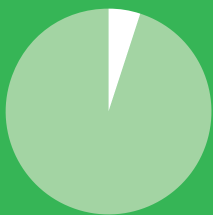


94%

the number of staff qualified to NFQ Level 5 or higher, the same as last year

Over 4 in 10

services reported having at least one staff member that left the service



5%

of staff signed a Grandfather Declaration

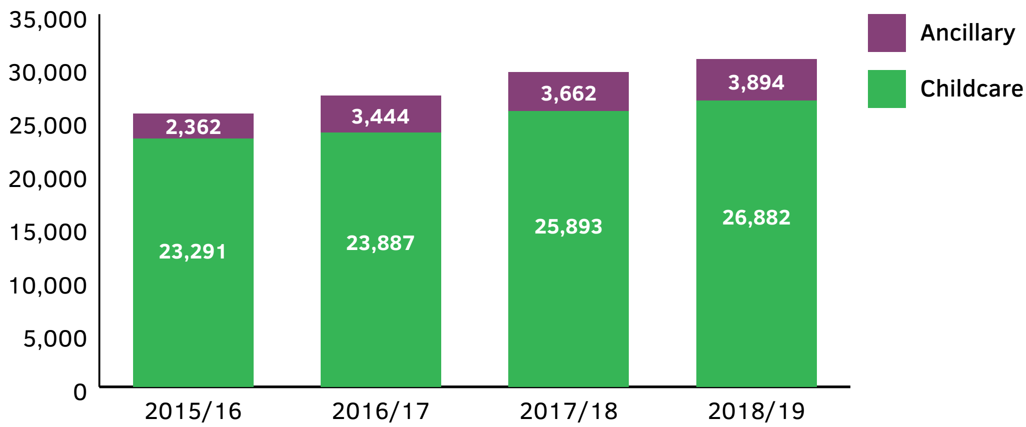
7.1 Introduction

This chapter provides an analysis of the service profile survey data on staff who work in Early Learning and Care (ELC) and School-Age Childcare (SAC) services. It includes information on those who work directly with children as well as ancillary staff[36]. This service profile survey data is the most comprehensive dataset currently available in respect of the ELC/SAC workforce in Ireland and includes information on staff working in 3,821 ELC and SAC services.

7.2 Staff numbers

Services reported that there were 26,549 staff working in ELC and SAC services in 2018/19. This includes staff working directly with children (23,190 or 87%) and ancillary staff (3,359 or 13%), who work in areas such as management, administration, catering and maintenance. **When these figures are extrapolated, it is estimated that a total of 30,775 staff were working in the sector across Ireland at the time of the survey, which is an increase of 4% on 2017/18.** Figure 7.1 shows the number of staff (extrapolated) over the last four years, for both staff working with children and those in ancillary roles.

Figure 7.1 Total number of staff in ELC and SAC services (extrapolated figures)



Services were asked to report on relief staff working with children, for the second year in a row. They reported that 948 staff worked in a relief capacity representing 3.9% of those working directly with children. For the purpose of this report, relief staff working with children were excluded from the analysis of the majority of characteristics, as some of them may work in multiple services and may have, therefore, been reported more than once in the survey (by different services).

36 Ancillary staff are staff providing necessary support to the primary activities or operation of ELC and SAC services. These include catering, maintenance and administrative staff.

Where relief staff are included in the analysis (i.e. in the wages section), this is clearly indicated. A brief overview of relief staff with key profile statistics is outlined below.

7.2.1 Relief staff – key characteristics

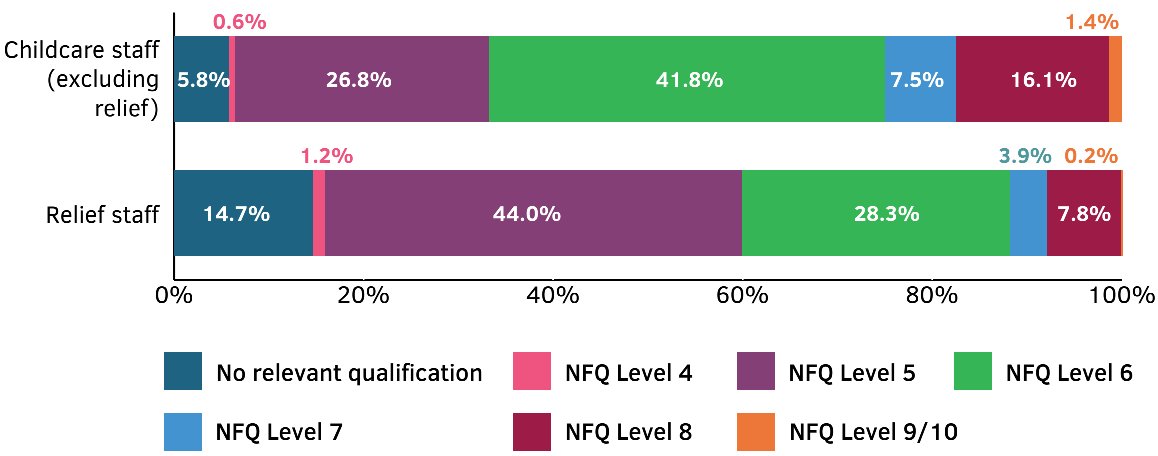
Relief staff share some characteristics with the other staff who work directly with children. As a cohort, they are predominantly female (96%) and they are equally likely to work in urban or rural areas as other staff working with children. However, they are marginally more likely to work in community services (35%) than in private ones when compared to other staff - 34% of other staff working with children do so in community services (see Table 7.1).

Table 7.1 Number and percentage of relief staff and other staff working directly with children by urban/rural location and organisation type

	Community		Private		Urban		Rural		All staff
	Number	%	Number	%	Number	%	Number	%	
Relief staff	332	35%	616	65%	684	72%	264	28%	948
All other staff working directly with children	7,974	34%	15,216	66%	16,613	72%	6,577	28%	23,190

Over half of relief staff (55%) have completed Children First training, however, this percentage is lower than for all other staff who work directly with children (72%). Relief staff tend to have less experience in the sector, with 17% having over ten years' experience, while the corresponding figure for all other staff is 32% (see Figure 7.7). They also tend to be younger, with 22% of relief staff aged 24 years or under compared to 13% of all other staff (see Figure 7.8). The vast majority (84%) of relief staff have an NFQ qualification at Level 5 or higher, although this is lower than for all other staff (94%) (see Figure 7.2).

Figure 7.2 Highest level of qualification for staff working directly with children



Relative to other staff working with children, relief staff are almost twice as likely to be assigned to work with children aged 5 years and over. They are also marginally less likely to work with babies (see Table 7.2).

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

	Up to 1 year	1+ to 3 years	3+ to 5 years	5+ years
Relief staff	3%	32%	47%	18%
All other staff	5%	26%	59%	10%

7.3 Places of employment

Table 7.3 provides a breakdown of the numbers of staff working in community/private and urban/rural services. The majority of staff (64%) work in private services and in urban locations (72%). However, these figures are not proportional to the breakdown of services (who responded to the survey), as 73% are private (see section 1.3.1.1) and 65% are located in urban areas. This indicates that community services and those in urban areas tend to be larger.

This year, the average number of staff per service was 7.0, an increase on the corresponding figure for 2017/18, which stood at 6.4. Community services are, on average, larger than private services with community services employing on average 9.3 staff compared to an average of 6.1 staff in private services. Services in urban areas have an average of 7.7 staff members, while in rural areas the corresponding figure is 5.6. Across all services, an average of 6.1 staff members work directly with children, with 0.9 of a staff position encompassing the various ancillary roles.

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

		Staff working directly with children		Ancillary staff		All staff	
Services	**Total number of services***	Number of staff	Average per service	Number of staff	Average per service	Number of staff	Average per service
All	3,820	23,190	6.1	3,359	0.9	**26,549**	**7.0**
Community	1,029	7,974	7.7	1,625	1.6	**9,599**	**9.3**
Private	2,791	15,216	5.5	1,734	0.6	**16,950**	**6.1**
Urban	2,493	16,613	6.7	2,538	1.0	**19,151**	**7.7**
Rural	1,327	6,577	5.0	821	0.6	**7,398**	**5.6**

*One service recorded having one relief staff member only.

7.4 Category of employment

Table 7.4 presents the breakdown of staff in community and private services by employment type. Similar to 2017/18, the vast majority of staff were direct employees (92%). This proportion is lower in community services, where directly employed staff accounted for 80% of all employees. In comparison, almost all staff in private services (99%) were directly employed.

The breakdown of other employees, i.e. those on employment schemes or other government-funded programmes, is similar to last year, with the Community Employment (CE) programme accounting for the largest proportion (6% of all staff). One in five staff in community services are working as part of an employment scheme/government funded programme, with CE representing the largest proportion of all scheme/programme staff (72%). Smaller proportions of staff (28% of scheme/programme staff and 2% of all staff) are recruited through other schemes or programmes, including the Community Service Programme (CSP), the Job Initiative Scheme (JI), JobsPlus, Tús and the Youth Employment Support Scheme (YESS). The higher numbers of staff on schemes/programmes in community services is associated with the fact that community services can access a wider range of employment schemes/programmes.

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

Table 7.4 Number of staff working in ELC/SAC services by type of employment

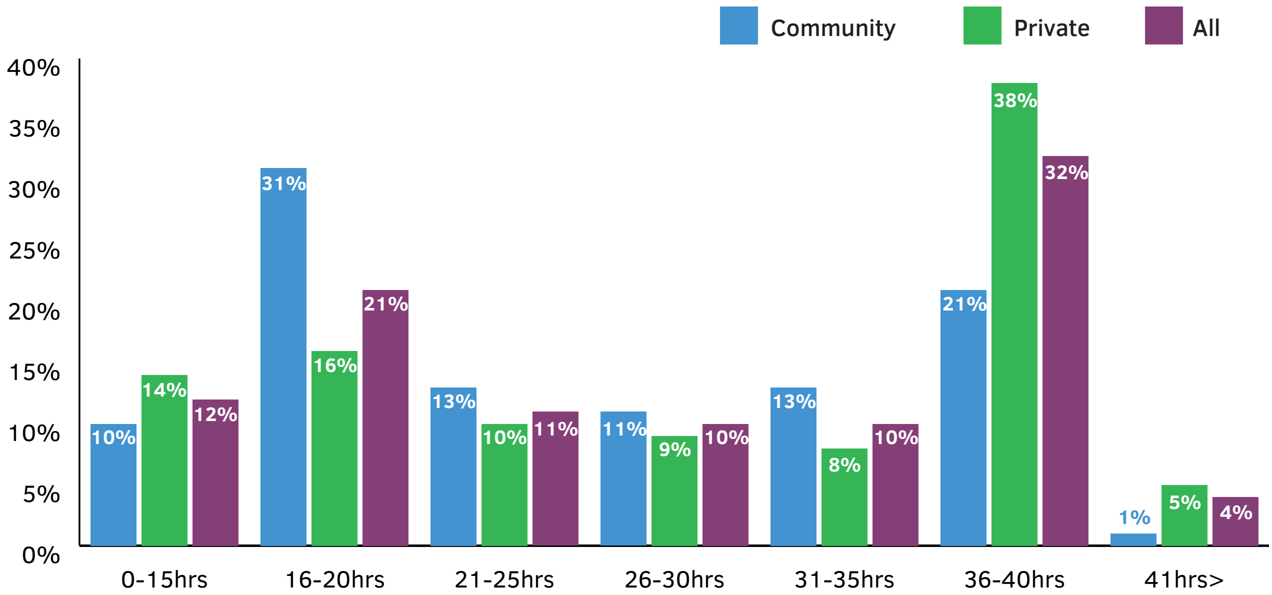
	Community	Private	Total	% of total staff
Number of services	1,029	2,792	3,821	**N/A**
Directly employed staff	7,672	16,837	24,509	**92.3%**
Staff on schemes/programmes	1,927	113	2,040	**7.7%**
CE – Community Employment*	1,472	N/A	1,472	5.5%
CSP – Community Service Programme*	211	N/A	211	0.8%
JI – Job Initiative Scheme*	63	N/A	63	0.2%
JobsPlus	24	100	124	0.5%
Tús*	155	N/a	155	0.6%
YESS – Youth Employment Support Scheme	2	13	15	0.1%
Total staff	**9,599**	**16,950**	**26,549**	**100.0%**

*These schemes are in community services only.

7.5 Average hours worked

Respondents were asked to state the average number of hours worked for each staff member working directly with children. 46% of staff worked over 30 hours per week in 2018/19. Figure 7.3 shows the percentage of staff by organisation type and range of hours worked. Staff working in community services are almost twice as likely to work between 16-20 hours (31%), compared to staff working in private services (16%). Overall, staff working in private services work longer hours, with 43% working 36 hours or more compared to 22% staff in community services.

Figure 7.3 Percentage of staff working directly with children by average number of hours worked per week



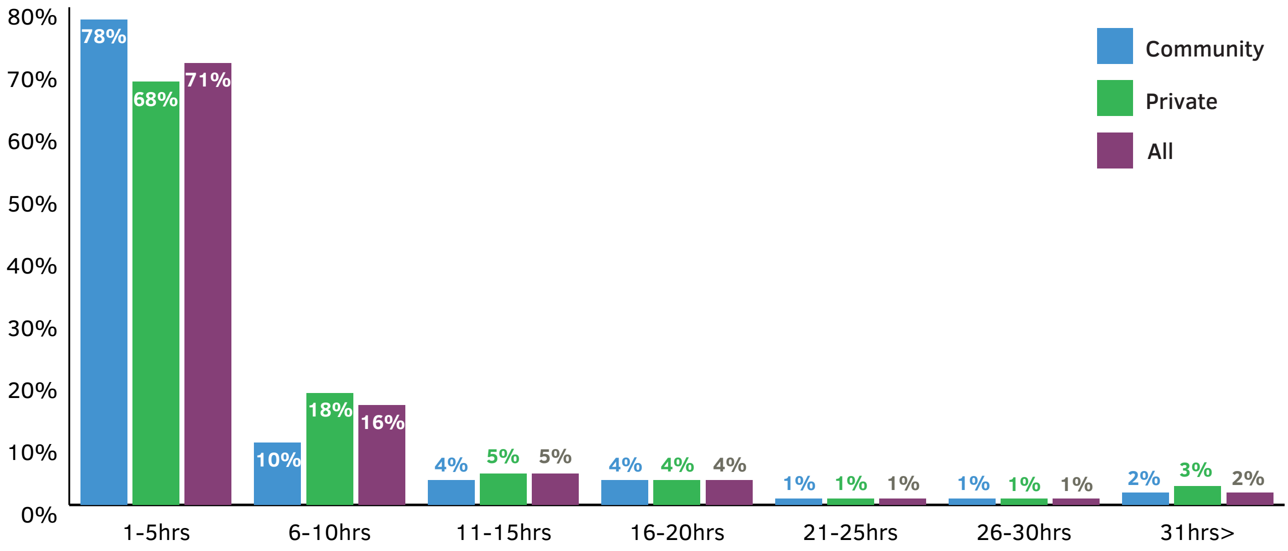
7.6 Non-contact hours per week

Respondents were also asked to indicate the number of non-contact hours[37] worked per week for each staff member who works directly with children. As can be seen from Figure 7.4, the largest percentage of staff work between one and five non-contact hours (71%). This is higher for staff in community services (78%) compared to private services (68%).

This is followed by staff working six to ten hours (16%), which is higher for staff working in private services (18%) than those working in community services (10%). The remaining non-contact hours worked were the same or similar in both community and private services.

37 Non-contact hours (for staff who work directly with children) are those used for administration and tasks involved in providing quality childcare. In particular, the time providers need to spend familiarising themselves with the new childcare measures, signing contracts, meeting regulatory and compliance requirements, assisting parents with understanding how they can benefit and working with parents and other organisations in delivery of quality childcare.

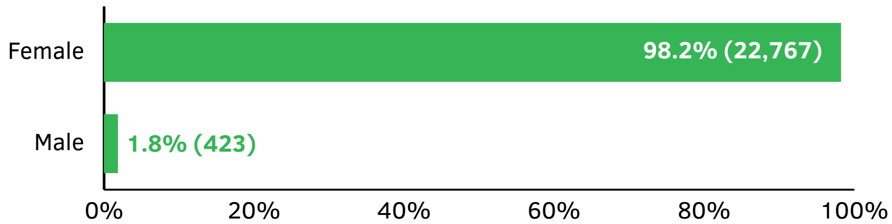
Figure 7.4 Percentage of staff working directly with children who work non-contact hours per week



7.7 Gender

In 2018/19, like in previous years, staff who worked directly with children[38] were almost exclusively female (98.2%), see Figure 7.5. There has been a slight increase in the proportion of males working directly with children, from 1.5% in 2017/18 to 1.8% this year.

Figure 7.5 Gender breakdown of staff working directly with children in ELC and SAC services

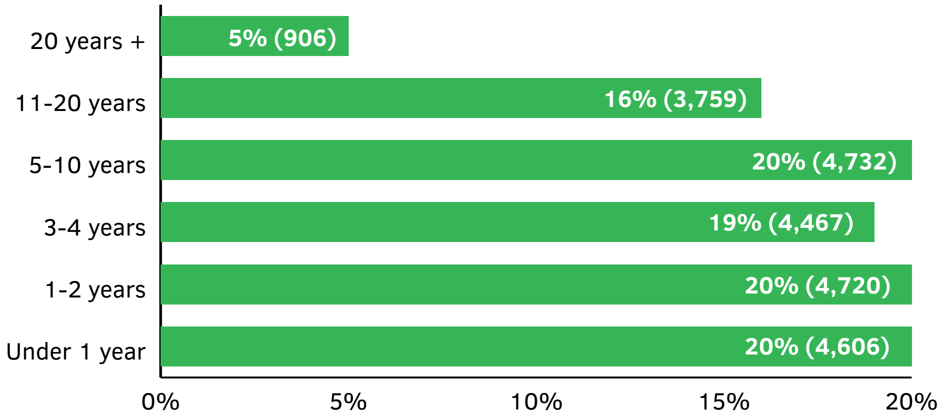


7.8 Length of time in service

Respondents were asked to indicate how long each staff member working directly with children[39] had worked in their current service. As shown in Figure 7.6, the majority of employees (59%) had been in their current service for less than five years. Only 21% of staff were in their current service for over ten years. This is up by one percentage point on the corresponding figure for last year. 60% of staff have been in their current service for longer than 2 years.

38 The question was not asked for Ancillary staff in 2018/19.
39 The question was not asked for Ancillary staff in 2018/19.

Figure 7.6 Breakdown of staff working directly with children by length of time in current service



The length of employment in a service for staff working directly with children is broadly similar across urban and rural locations (for a detailed breakdown, see Table 7.5). This was also the case in 2017/18. More pronounced differences in the length of staff employment in the service were observed between community and private services. On average, staff in community services have been working for longer in the service than their counterparts in private facilities. For example, almost half of staff in community settings (48%) have worked there for five years or more, compared to 38% of staff in private services.

Table 7.5 Breakdown of staff working directly with children by length of time in current service, organisation type and urban/rural location

	Community	Private	Urban	Rural	Total
Number of staff	**7,974**	**15,216**	**16,610**	**6,574**	**23,190**
Under 1 year	17%	21%	21%	18%	**20%**
1-2 years	18%	21%	21%	19%	**20%**
3-4 years	17%	20%	19%	19%	**19%**
5-10 years	24%	19%	19%	22%	**20%**
11-20 years	20%	14%	16%	18%	**16%**
20 years +	4%	5%	4%	4%	**5%**

7.9 Length of time working in the ELC and SAC sector

Respondents also provided data on the length of time that staff had been working in the sector. This was asked only for staff working directly with children. The data shown in Figure 7.7 indicates that there is inter-service mobility within the sector, as personnel move from one service to another. Among all these staff, just 6% were new entrants (i.e. they entered the sector within the past year) and this percentage remained unchanged since last year. However, 20% of staff were with their current service for less than one year. At the other end of the spectrum, 32% of staff were in the childcare sector for over ten years, with 8% of staff having over twenty years of experience. These figures are similar to those recorded in previous years.

Figure 7.7 Staff working directly with children by length of time in current service and the ELC/SAC sector

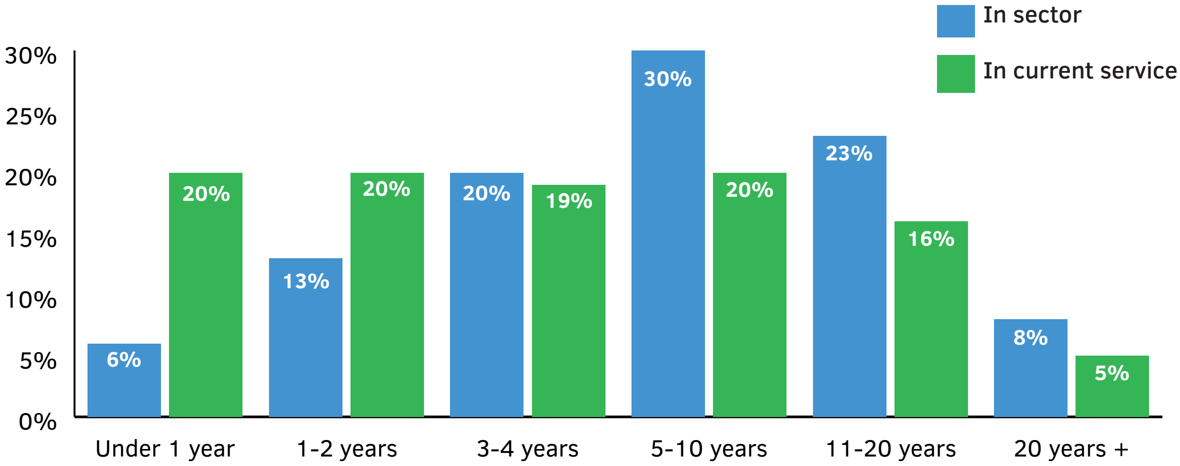


Table 7.6 presents the community/private and urban/rural breakdown of staff and the length of time that they have worked in the sector. Length of employment in the sector has not been visibly affected by the location or type of service staff are employed in. New entrants to the sector (under 1 year) are more likely to work in community services (8%) than private facilities (5%).

Table 7.6 Breakdown of staff working directly with children by length of time in the sector, organisation type and urban/rural location

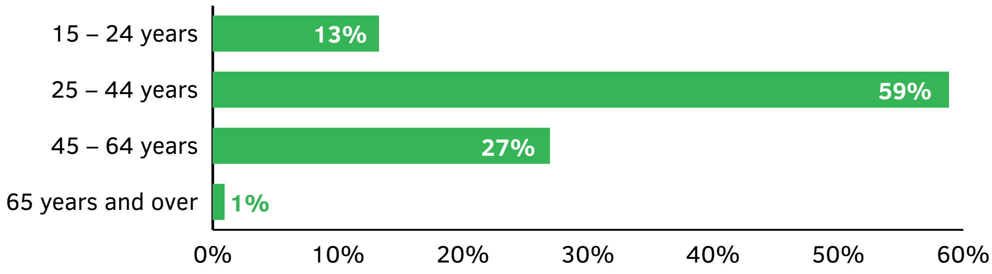
	Community	Private	Urban	Rural	Total
Number of staff	**7,974**	**15,216**	**16,613**	**6,577**	**23,190**
Under 1 year	8%	5%	6%	6%	**6%**
1-2 years	13%	13%	13%	11%	**13%**
3-4 years	18%	21%	21%	18%	**20%**
5-10 years	28%	30%	30%	31%	**30%**
11-20 years	26%	22%	22%	26%	**23%**
20 years +	7%	9%	8%	8%	**8%**

7.10 Age profile of staff

Respondents were asked to indicate an age band for staff members working directly with children[40]. Figure 7.8 presents the age profile of staff. This has changed very little in recent years. Over half of all staff (59%) are aged 25 to 44 years and 72% are aged under 45 years.

40 The question was not asked for Ancillary staff in 2018/19.

Figure 7.8 Percentage of staff working directly with children by age band



The community/private and urban/rural breakdown of the age profile of staff is similar to that recorded for 2017/18. Staff working in private services are on average slightly younger, with 75% of their staff aged under 45 compared to 67% in community services. Urban and rural differences in respect of age profile are minor (see Table 7.7 for details). Rural services have a higher proportion of staff aged 45 and older (32%), while across urban services the corresponding figure is 26%.

Table 7.7 Number and percentage of staff working directly with children by age cohort, organisation type and urban/rural location

	Community	Private	Urban	Rural	Total
Number of staff	**7,974**	**15,216**	**16,613**	**6,577**	**23,190**
15–24 years	10%	15%	14%	11%	13%
25–44 years	57%	60%	60%	57%	59%
45–64 years	32%	24%	25%	31%	27%
65 years and over	1%	1%	1%	1%	1%

7.11 Job titles

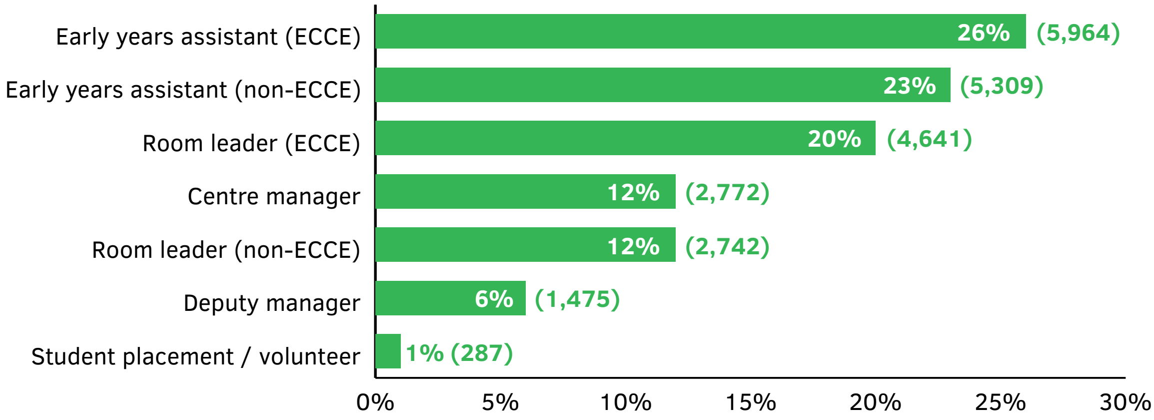
The survey collected information on job titles for individual staff members. Respondents were given a list of job titles and were asked to select the most appropriate one in each case. Given the different nature of the work performed by staff who work directly with children and ancillary staff, two separate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

7.11.1 Staff who work directly with children

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

Almost half of all staff (46%) work primarily with ECCE children, with 26% as early years assistants and 20% as room leaders. The corresponding figures for staff working with non-ECCE children are 23% as early years assistants and 12% as room leaders. Figure 7.9 presents the numbers and percentages of staff by job title.

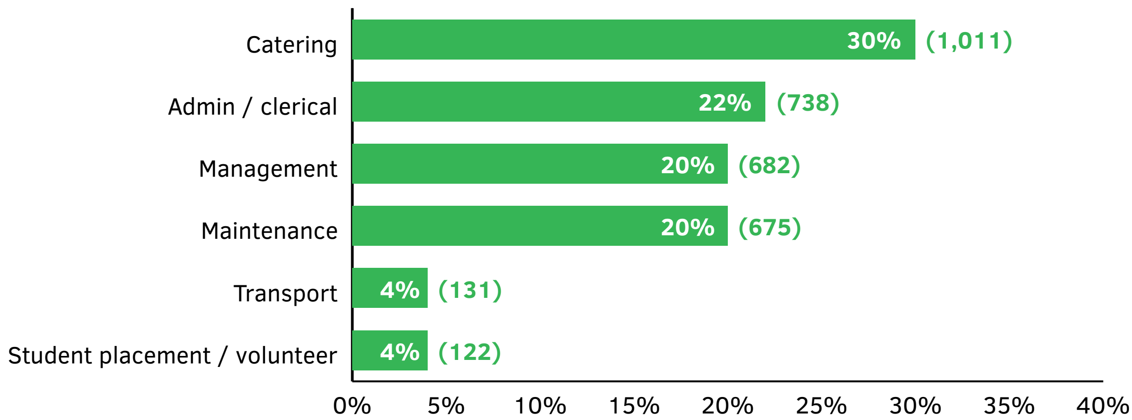
Figure 7.9 Staff working directly with children by job title



7.11.2 Ancillary staff

As has been the case in previous years, catering staff account for the single biggest cohort among ancillary staff (30%). Those working mainly in management and administration together account for a further 42%. Figure 7.10 presents the numbers and percentages of ancillary staff by their job titles.

Figure 7.10 Ancillary staff by job title

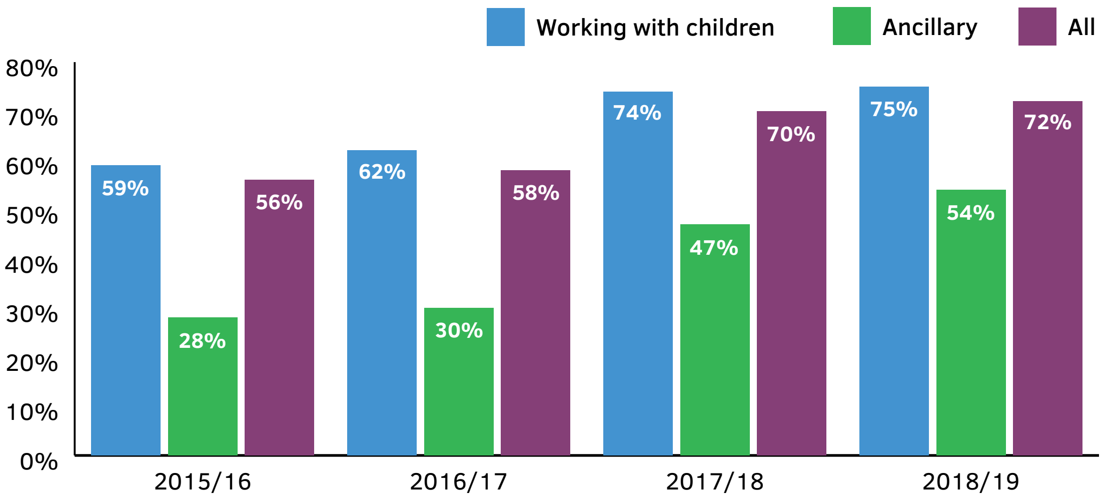


7.12 Children First training

Survey respondents were asked to indicate whether individual staff members had completed "Children First"[41] training in the last three years. As Figure 7.11 shows, the proportion of staff who have completed this training increased again this year. The proportion of all staff with this training now stands at 72%. This proportion is higher for staff who work directly with children (75%) than ancillary staff (54%). There was a more significant increase in the share of ancillary staff who completed Children First training (7%) compared to the same share for staff working directly with children (1%) in 2018/19.

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

Figure 7.11 Percentage of staff who received Children First training

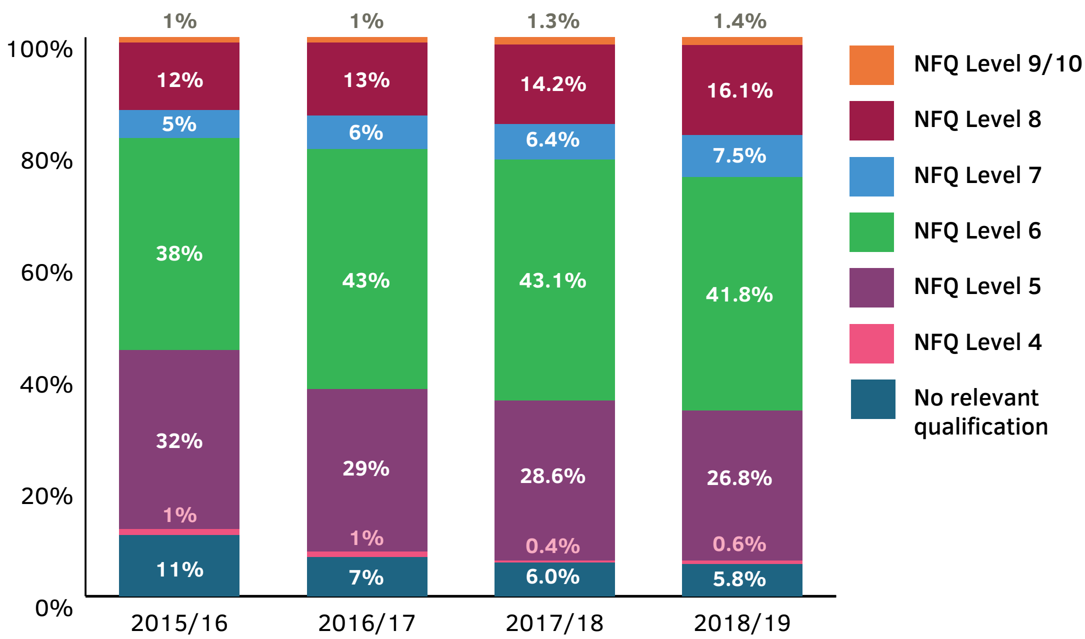


7.13 Staff qualifications

7.13.1 Staff highest qualifications

Survey respondents provided details of qualifications only for staff working with children. In 2018/19, staff qualification levels in the sector continued to increase following the trend observed in recent years. The total number of personnel with qualifications at NFQ Level 5 or higher was reported at 21,736. This represents 94% of all staff working directly with children, the same as reported in 2017/18. The proportion of staff with a qualification at NFQ Level 6 or higher was 67% (15,512). This was up from 65% last year and 63% in 2016/17. A quarter of staff had a qualification of Level 7 or above, compared to 22% in 2017/18. The overall proportion of staff with no formal qualifications relevant to the ELC and SAC sector remained the same in 2018/19 (6%) as last year. The year-on-year changes in respect of staff qualifications are presented in Figure 7.12.

Figure 7.12 Staff working directly with children – percentage by highest level of qualification between 2015/16 and 2018/19



Under the Childcare (Early Years Services) Regulations Act (2016), all staff working directly with children must hold a minimum of a NFQ Level 5 qualification, as of December 31st 2016. The legislation exempts those who signed the Grandfather Declaration (as discussed in section 7.13.4). 2018/19 marks the first time in three years where the proportion of staff with an NFQ Level 5 qualification or above remained unchanged from the previous year, since the introduction of the legislation (see Figure 7.13). Figure 7.13 includes staff who are on employment schemes or other government funded programmes. When the staff who are on those schemes / programmes are excluded, the proportion of staff (directly-employed) with an NFQ Level 5 qualification or higher was 96% in 2018/19.

Figure 7.13 Percentage of staff who have an NFQ Level 5 qualification or above (from 2010 to 2018/19)

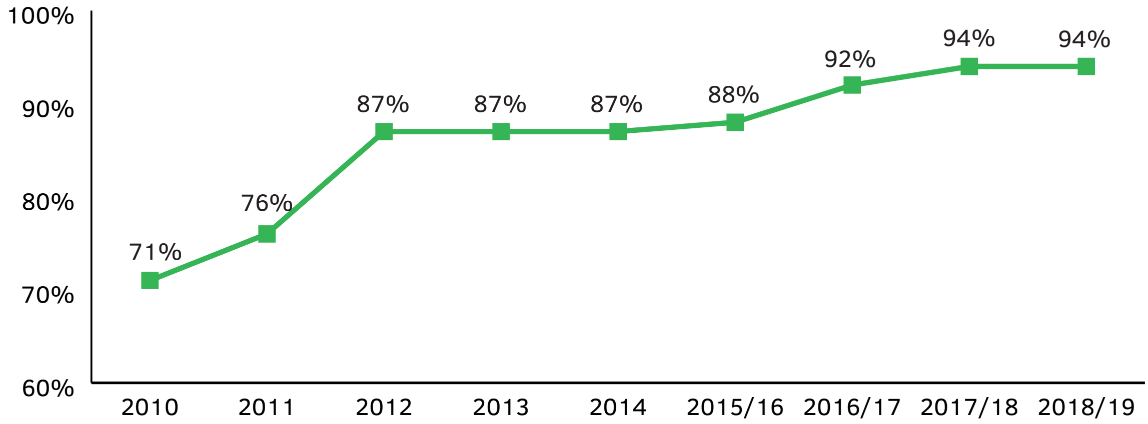


Table 7.8 provides further details regarding staff qualifications. On average, staff in private services have higher qualifications. Over two thirds of staff in private services (72%) have an NFQ Level 6 qualification or above, compared to 58% of staff in community services. This difference may be associated with community services' higher levels of staff who are on employment schemes or government funded programmes, whose qualifications are lower – 18% of all staff on employment schemes/other government funded programmes have an NFQ Level 6 or higher, in comparison to 70% of direct employees.

Table 7.8 Staff working directly with children – number and percentage by highest level of qualification

	Community		Private		All	
Qualification level	**Number of staff**	**% of staff**	**Number of staff**	**% of staff**	**Number of staff**	**% of staff**
Total staff	**7,974**	**34%**	**15,216**	**66%**	**23,190**	**100%**
NFQ Level 5 or above	7,056	88.5%	14,680	96.5%	**21,736**	**93.7%**
NFQ Level 6 or above	4,622	58.0%	10,890	71.6%	**15,512**	**66.9%**
No relevant qualification	869	10.9%	486	3.2%	**1,355**	**5.8%**
NFQ Level 4 Award	49	0.6%	50	0.4%	**99**	**0.6%**
NFQ Level 5 Award	2,434	30.5%	3,790	24.9%	**6,224**	**26.8%**
NFQ Level 6 Award	3,129	39.2%	6,574	43.2%	**9,703**	**41.8%**
NFQ Level 7 Award (Ordinary Degree)	427	5.4%	1,313	8.6%	**1,740**	**7.5%**
NFQ Level 8 Award (Honours Degree)	974	12.2%	2,771	18.2%	**3,745**	**16.1%**
NFQ Level 9/10 Award (Masters/PhD)	92	1.2%	232	1.5%	**324**	**1.4%**

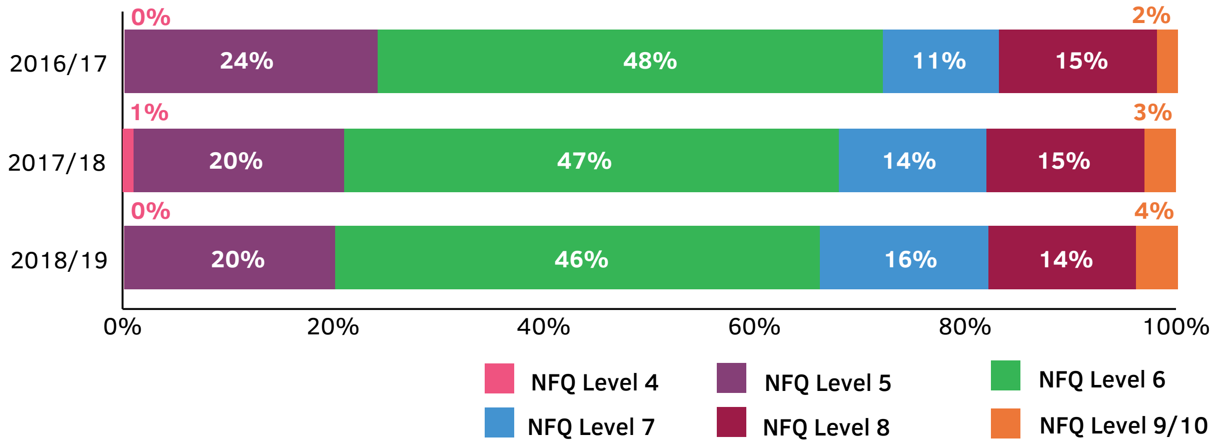
Appendix V presents the breakdown of qualifications of staff working directly with children by urban/rural location. There are no major differences between staff qualifications in urban and rural areas.

7.13.2 Qualifications in process

The survey asked respondents to provide details regarding staff who were in the process of acquiring qualifications. The responses provide a profile of the qualifications expected to come on stream within the sector. At the time of the survey, 3,659 people, representing 16% of staff working directly with children, were in the process of acquiring a qualification. Figure 7.14 compares the levels of qualifications sought in 2016/17, 2017/18[42] and 2018/19 by the staff in process of acquiring a qualification. The majority of staff studying for higher qualifications planned to obtain an award at NFQ Level 6. Over time, the proportion of those who study for an NFQ Level 7 qualification increased from 11% in 2016/17 to 16% this year. Also, there has been a continuous growth in the proportion of staff who study for the highest levels – NFQ Level 9/10 – whose proportion doubled since 2016/17.

42 Relief staff were incorrectly included in this chart in the 2017/18 Early Years Sector Profile report. They are now excluded in Figure 7.14.

Figure 7.14 Staff working directly with children – level of qualification in process of attaining



7.13.3 Staff with no qualifications

In order to establish the number of staff who are neither qualified nor in the process of qualifying, further analysis and cross-referencing was required. Firstly, the number of persons who were not qualified to NFQ Level 5 was established (1,454). Then, staff who belonged to any of the following categories were removed: student and volunteer placements; those who had signed a Grandfather Declaration[43]; and those in the process of obtaining an NFQ Level 5 or above. As a result, a total of 351 staff working directly with children (1.5%) were identified as not yet qualified and not in the process of qualifying, as of June 2019 (compared to 1.4% in May 2018). If the staff who are in process of obtaining an NFQ Level 5 qualification are included, the number of staff with no qualification was 903 (3.9% of all staff). Last year, this figure was the same (903), however, staff with no qualification represented 4.1% of all staff.

7.13.4 Signed Grandfather Declaration

As noted earlier, regulations introduced in 2016 require all staff members working directly with children to have a minimum relevant qualification of NFQ Level 5. The exception to this requirement are any staff members who have signed a 'Grandfather Declaration'. This declaration states their intention to retire or resign before the 1st September 2021. Services reported 1,172 staff members who have signed the declaration. This represents 5% of all staff – the same proportion as recorded in 2017/18 and 2016/17.

Table 7.9 presents a county breakdown of staff who have signed a Grandfather Declaration. At 17.6%, Leitrim had the highest proportion of staff who signed a 'Grandfather Declaration', while Louth had the lowest, at 2.7%.

43 For details regarding Grandfather Declarations, see section 7.13.4.

Table 7.9 Staff working directly with children who have signed a Grandfather Declaration

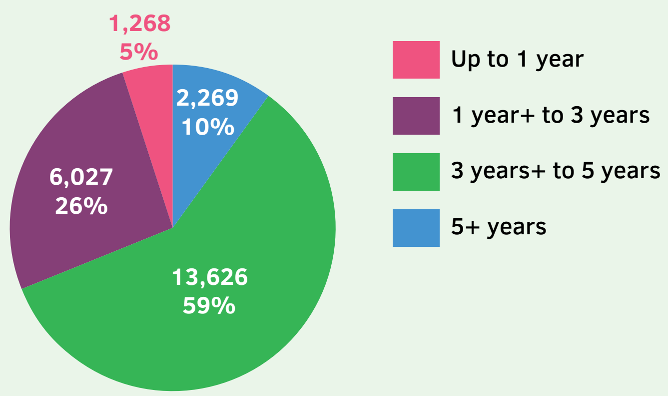
	Total number of staff working in services	Staff with signed Grandfather Declaration	
		Number	%
Carlow	319	13	4.1%
Cavan	420	18	4.3%
Clare	600	56	9.3%
Cork City	574	27	4.7%
Cork County	1,818	103	5.7%
Donegal	810	46	5.7%
Dublin - Dublin City	2,603	154	5.9%
Dublin - Dún Laoghaire-Rathdown	1,103	51	4.6%
Dublin - Fingal	1,484	54	3.6%
Dublin - South Dublin	1,294	45	3.5%
Galway	1,256	55	4.4%
Kerry	703	30	4.3%
Kildare	1,098	32	2.9%
Kilkenny	479	16	3.3%
Laois	379	30	7.9%
Leitrim	188	33	17.6%
Limerick	963	87	9.0%
Longford	233	10	4.3%
Louth	670	18	2.7%
Mayo	506	25	4.9%
Meath	915	36	3.9%
Monaghan	511	22	4.3%
Offaly	348	11	3.2%
Roscommon	333	30	9.0%
Sligo	435	15	3.4%
Tipperary	848	54	6.4%
Waterford	559	22	3.9%
Westmeath	442	20	4.5%
Wexford	669	41	6.1%
Wicklow	630	18	2.9%
Total	**23,190**	**1,172**	**5.1%**

7.14 Age range of children catered for

The survey gathered data on the age range of children with whom each staff member primarily works. As would be expected from the age breakdown of children enrolled in ELC and SAC services, the majority of staff (59%) work primarily with children aged 3+ to 5 years. The smallest proportion of staff (5%) work with babies, which is to a degree proportionate to the share of babies, who account for 2% of all children enrolled (see section 5.2). Figure

7.15 presents a breakdown of staff by age range of children worked with. This breakdown is very similar to that of 2017/2018.

Figure 7.15 Staff working directly with children – by age range of children worked with



As can be seen in Table 7.10, on average, one staff member cares for eight children. The staff to children ratio is smallest for babies, with one staff member caring for two children in this age range, with the largest ratio being for children of 5 years or older (one staff member cares for 20 children in this age range, on average).

Table 7.10 Average number of staff working directly with children – by age range of children worked with and number of children per staff member

	Number of staff	Number of children enrolled	Number of children per staff member
Up to 1 year	1,268	2,991	2
1 year+ to 3 years	6,027	30,410	5
3 years+ to 5 years	13,626	98,191	7
5+ years	2,269	46,378	20
Total	**23,190**	**177,970**	**8**

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

- The most qualified personnel are more likely to be working with children aged up to 5 years, particularly those aged 3+ to 5 years.
- A staff member with an NFQ Level 8 or higher is twice as likely to care for children aged 3+ to 5 years.
- One in five staff working with children aged between 3+ to 5 years has an NFQ Level 8 or 9 qualification compared to one in nine working with children aged 5 years and over.
- Staff working in school-age childcare tend to have the lowest qualification levels, with 23.5% not having any relevant formal qualification, although 57.6% have either an NFQ Level 5 or 6 award.

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

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

	Up to 1 year	1 year+ to 3 years	3 years+ to 5 years	5+ years	Total by age range
Total number of staff	**1,268**	**6,027**	**13,626**	**2,269**	**23,190**
NFQ Level 5 or above	95%	94%	97%	75%	94%
No relevant qualification	4.8%	5.7%	3.1%	23.5%	5.8%
NFQ Level 4	0.6%	0.4%	0.2%	1.8%	0.6%
NFQ Level 5	38.2%	36.3%	21.2%	29.0%	26.8%
NFQ Level 6	41.7%	41.6%	44.2%	28.6%	41.8%
NFQ Level 7	4.8%	4.8%	9.3%	5.5%	7.5%
NFQ Level 8	9.6%	10.6%	20.4%	9.4%	16.1%
NFQ Level 9/10	0.3%	0.6%	1.7%	2.2%	1.4%

7.15 Wages

7.15.1 Methodology

The survey collected information on the wages of staff who work directly with children[44]. As part of the data cleaning process, student placements/volunteers and those receiving nominal wages were excluded. Thus, only staff in receipt of more than €1 per hour were included in the analysis. At the top end of the range, data for staff with the highest hourly wage of €70 was removed. In previous years, data on wages for staff on the various employment schemes/ government funded programmes were included to provide a complete picture of wages across the sector. However, in 2018/19 this data was excluded from analysis, as many of the schemes define the earnings of their participants. To be able to compare this year's average wage with last year's figure, two figures for national average wage were provided depending on the methodology used.

As many childcare providers are self-employed and may not pay themselves a standard or regular wage, the survey instructions included specific advice for them. Services were asked to calculate their hourly rate based on the gross earnings for the previous month. This data also includes relief staff, as it is likely that they may receive different wages in the different services that they provide the cover for.

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

44 Ancillary staff were not covered by the question relating to wages.

7.15.2 Wages overall

The average hourly wage of staff working in the ELC and SAC sector is €12.55. This is the average wage based on the data for 22,416 staff who work directly with children[45], excluding staff on employment schemes/government funded programmes (wages for these staff were excluded as many of the schemes/programmes define the earnings of their participants and services have no say in how much such staff earn). Six out of ten staff earn below the living wage rate of 2019 (€12.30 per hour).

In order to compare the average wage in 2018/19 with 2017/18, the same methodology applied last year was applied on this year's data (i.e. by also including staff on schemes/other government funded programmes). The average hourly wage in 2018/19 using last year's methodology is €12.37, which represents an increase of 3% on the previous year.

This overall national figure is determined by a range of variables, of which the top five are analysed in subsequent sections. As in 2016/17 and 2017/18, job title has the single biggest influence on wages. This is followed by length of time worked in the service (second factor) and non-contact hours per week (third factor). County is the fourth most significant determinant, while highest qualification attained is the fifth. Table 7.12 presents all factors analysed, in descending order, based on their impact on wages.

Table 7.12 Variables affecting wages in the ELC/SAC sector and their level of impact

Variable	2016/17	2017/18	2018/19
Staff position/job title	21.5%	28.2%	**34.2%**
Length of time in service	10.0%	10.9%	**10.7%**
Non-contact hours per week	9.3%	9.4%	**9.8%**
County	15.7%	9.7%	**8.9%**
Highest qualification attained	8.8%	10.0%	**8.8%**
Length of time working in ELC/SAC sector	8.5%	11.6%	**7.7%**
Urban/rural location (CSO May 2018)	<1%	2.2%	**4.7%**
Deprivation index (Electoral District)	<1%	2.3%	**3.9%**
Category of children cared for	4.2%	3.2%	**3.4%**
Hours contracted to work per week	6.2%	3.5%	**3.3%**
Facility type (community/private)	3.2%	3.0%	**3.0%**
Age band	3.3%	2.9%	**1.1%**
On seasonal contract	1.5%	1.5%	**0.5%**
Other variables of negligible influence	5.9%	<2%	**<1%**

7.15.3 Staff position/job title

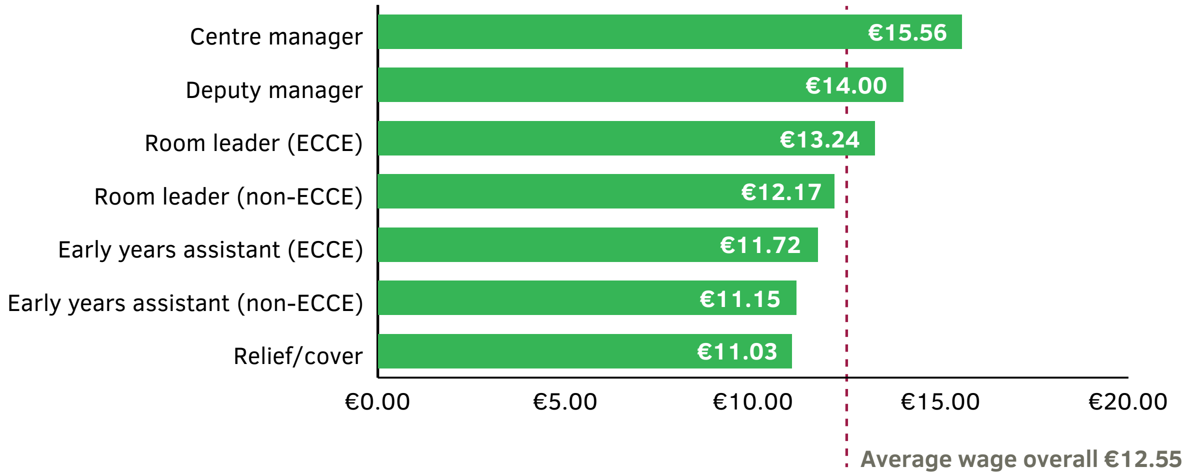
For the second time, the survey gathered data on relief staff working with children. For the majority of staff characteristics, relief staff were excluded from analysis due to potential double reporting of the same person by multiple

45 Includes all those whose wages data was used to do the analysis (including relief/cover staff), but excludes student placements/volunteers and staff on employment schemes / government funded programmes.

services. However, relief staff were included in the wages analysis as it is likely they may be paid different wages in different services. The average hourly rate for relief staff was €11.03, and was the lowest amongst the different staff positions.

As was the case in 2016/17 and 2017/18, staff position/job title is the greatest predictor of wages. In general, staff in management and leadership roles earn the highest hourly wage with centre managers earning €15.56 and deputy managers €14.00 (see Figure 7.16). These are followed by room leaders (both ECCE and non-ECCE) at an average hourly wage of €12.85. The average hourly rate for early years assistants (both ECCE and non-ECCE), who constitute 49% of all staff working with children is €11.46 per hour, 84c below the living wage for Ireland in 2019.

Figure 7.16 Staff working directly with children – average hourly wage by job title



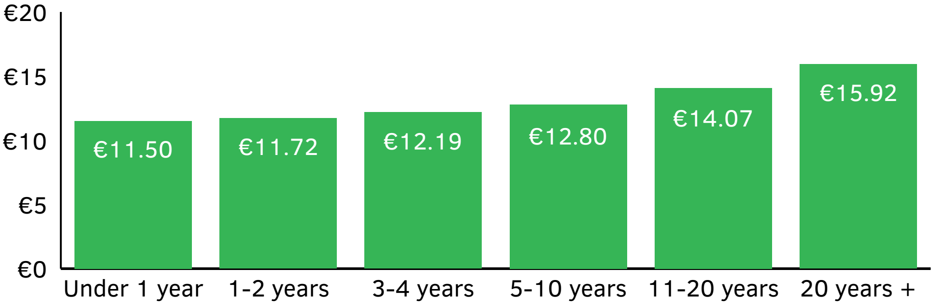
In Ireland, the living wage for 2019 was set at €12.30. The living wage refers to the level of earnings that makes possible a minimum acceptable standard of living[46]. Non-ECCE room leaders, early years assistants (both ECCE and non-ECCE) and relief staff earned, on average, below the 2019 living wage rate.

7.15.4 Length of time in service

The length of time staff worked in their current service had the second highest influence on the level of wages (see Figure 7.17). The average hourly wage for those working over 20 years in a service is €15.92, while the rate for those with less than one year's tenure in a service is €11.50 – a difference of €4.42 or 38%.

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

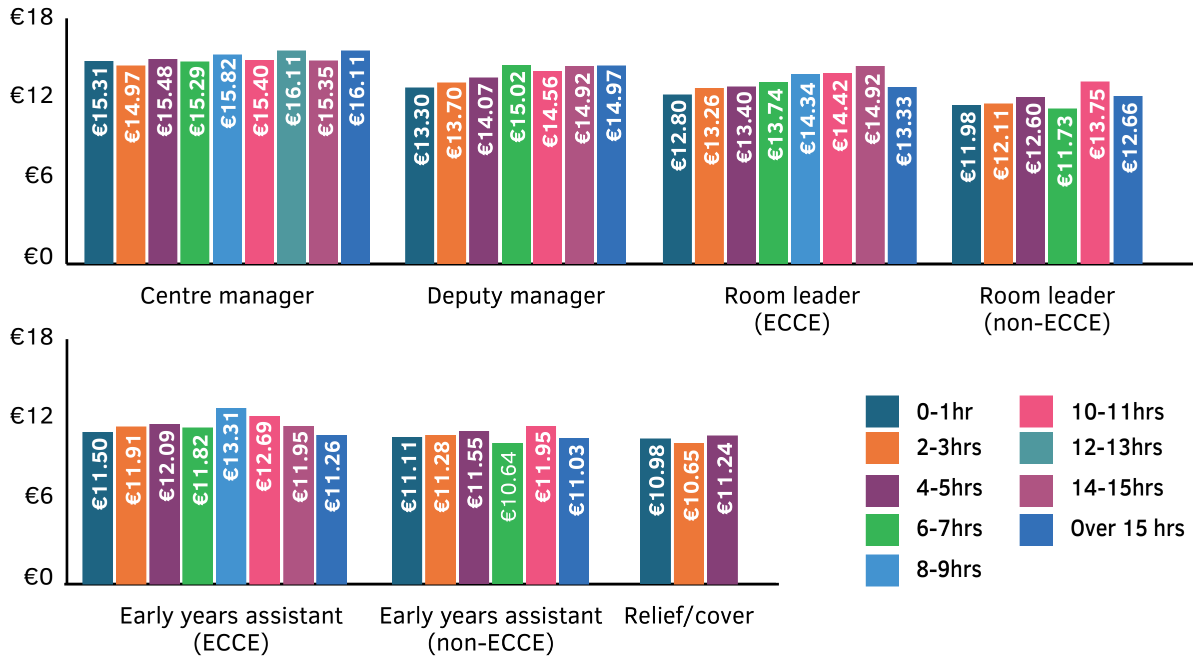
Figure 7.17 Staff working directly with children – average hourly wage by length of time in current service



7.15.5 Non-contact hours per week

As the number of non-contact hours worked was identified as a variable that influences wages, examination of non-contact hours against wages was performed. However, as the bivariate examination of non-contact hours and wages did not indicate any relationship, an additional factor of job title was added. Figure 7.18, which presents the average hourly wage by staff job title and the average number of non-contact hours worked, would suggest a relationship between wages, the number of non-contact hours worked and job title. For the majority of roles, the more non-contact hours staff worked, the higher their average hourly wage was.

Figure 7.18 Staff working directly with children – average hourly wage by non-contact hours and job title

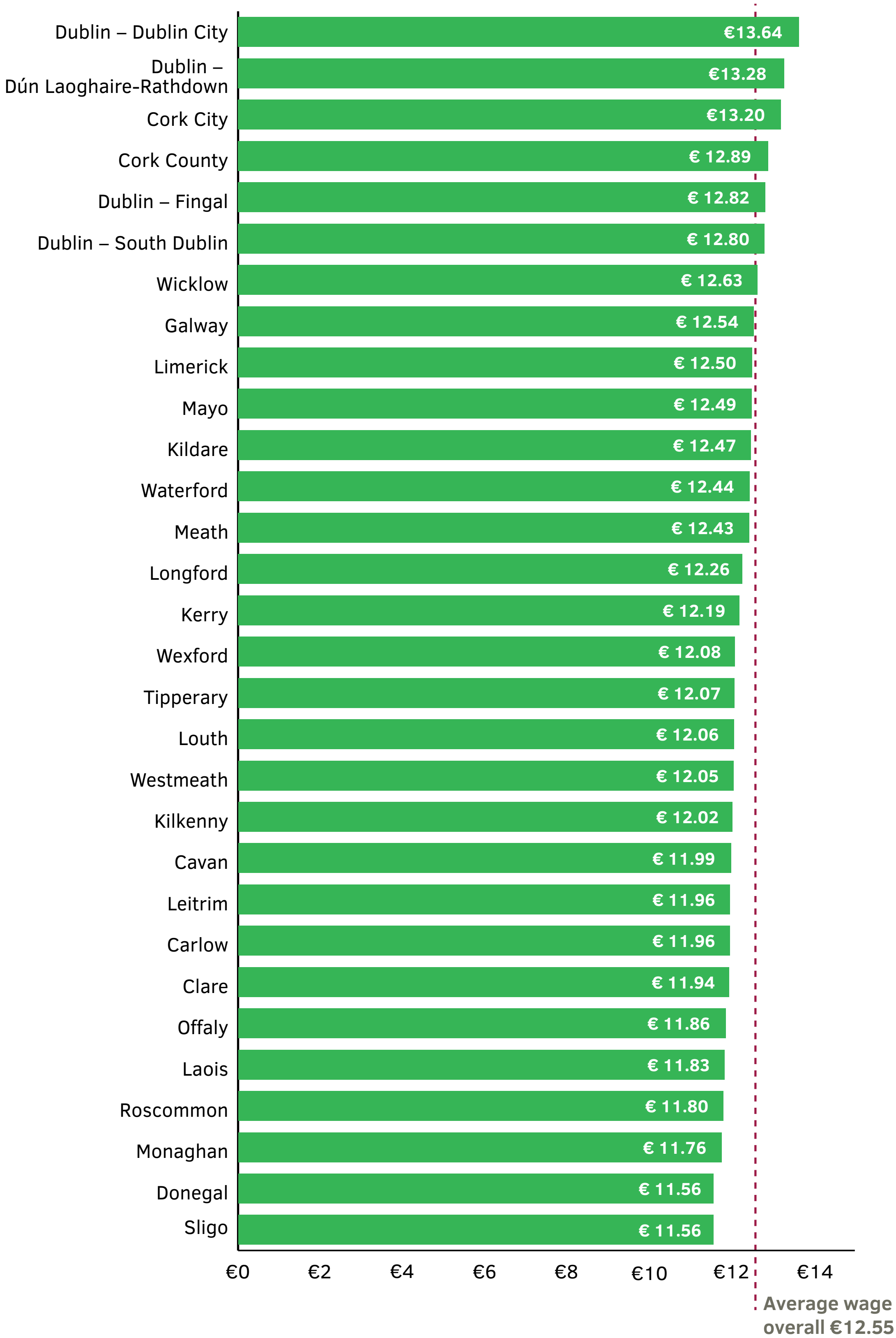


Note: Cohorts of staff where the sample size was smaller than 30 were removed from the chart to ensure that the averages are statistically representative.

7.15.6 County

The overall significance of county as a determinant of wages has slightly increased since 2017/18. The average hourly wages range from €11.56 per hour in Sligo and Donegal to €13.64 per hour in Dublin City. The overall geographical pattern for the highest rates of pay was recorded in Dublin, Cork and Wicklow, which is similar to that recorded for 2016/17 and 2017/18. Figure 7.19 presents the breakdown of average wages of childcare staff by county.

Figure 7.19 Average hourly wage of staff working directly with children by county



7.15.7 Highest qualification attained

Staff qualification levels also have an influence on wages. Figure 7.20 presents the average hourly wage for different levels of qualifications. Those with the highest qualifications (NFQ Level 9 or 10) also earn the highest wages (€15.18 per hour), while those with NFQ Level 5 qualifications earn the least – €11.42 per hour. The relationship between wages and qualifications is not linear. While newer staff are likely to have higher qualifications, they also have less experience and, therefore, are likely to earn less than those working longer in the sector. For example, those with NFQ Level 7 earn, on average, more than those who have NFQ Level 8, and those with NFQ Level 4 fare better than those who have NFQ Level 5. These anomalies in respect of the overall relationship between qualifications and wages were also observed between qualifications and wages in 2016/17 and 2017/18. This indicates that while qualifications are a driver of wages, their importance is not as significant as staff position and length of time in the sector (see Table 7.12).

Figure 7.20 Staff working directly with children – average hourly wage by highest level of qualification attained

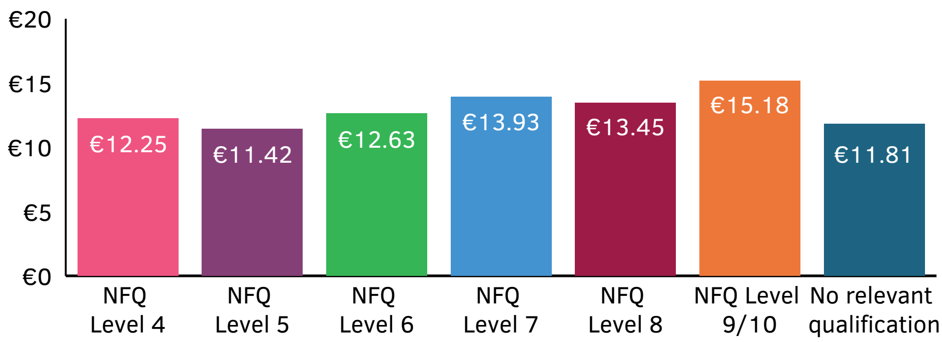


Table 7.13 provides a detailed breakdown of staff wages by staff position and level of qualifications. Please note that some of the staff categories outlined below have very few staff and therefore averages may be impacted by factors that have much stronger influence on the wages than qualifications. An example of this is room leaders (non-ECCE) qualified to NFQ Level 4 – there were only three staff in this category and one had worked in the sector for more than 10 years.

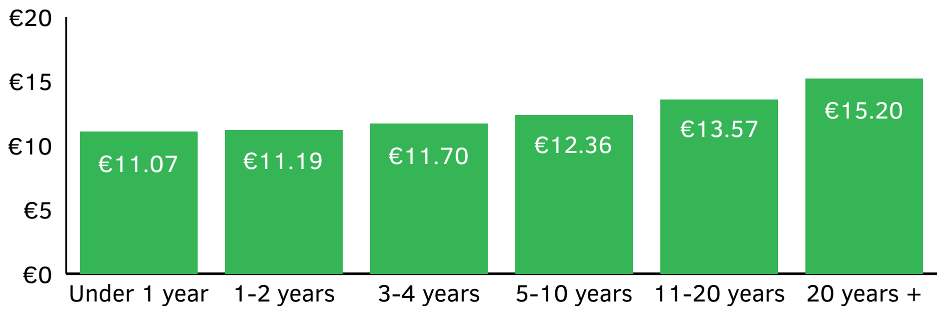
Table 7.13 Staff working directly with children – average hourly wage by job title and highest level of qualification attained

Job title	NFQ Level 4 (N=101)	NFQ Level 5 (N=6,590)	NFQ Level 6 (N=9,959)	NFQ Level 7 (N=1,773)	NFQ Level 8 (N=3,816)	NFQ Level 9/10 (N=325)	No relevant qualification (N=1,287)	Total (N=23,851)
Centre manager	€15.14	€14.42	€15.20	€16.08	€15.99	€17.19	€15.92	**€15.56**
Deputy manager	€12.53	€13.09	€13.80	€14.78	€14.65	€15.38	€13.67	**€14.00**
Early years assistant (ECCE)	€12.52	€11.50	€11.83	€12.08	€12.02	€11.98	€11.78	**€11.72**
Early years assistant (non-ECCE)	€11.44	€10.98	€11.18	€11.45	€11.62	€15.41	€11.19	**€11.15**
Relief / cover	€11.42	€10.79	€11.34	€11.76	€11.55	N/a	€10.60	**€11.03**
Room leader (ECCE)	€11.50	€11.71	€12.99	€13.98	€13.38	€14.10	€12.60	**€13.24**
Room leader (non-ECCE)	€16.33	€11.58	€12.25	€12.49	€12.85	€14.09	€12.25	**€12.17**
Total	**€12.25**	**€11.42**	**€12.63**	**€13.93**	**€13.45**	**€15.18**	**€11.81**	**€12.55**

7.15.8 Length of time working in ELC/SAC sector

The survey data also shows a relationship between staff wages and the length of time staff worked in the sector, which reflects experience. This factor was the sixth most important factor influencing the wages. Figure 7.21 shows the average hourly wage depending on the length of time in the sector. As would be expected, the longer staff worked in the sector, the higher the hourly wage they earned. Those working in the sector under one year earned €11.07 per hour and those with 20 years of experience or more earned €15.20 per hour, on average. Those working in the sector for less than five years earned, on average, below the living wage for 2019.

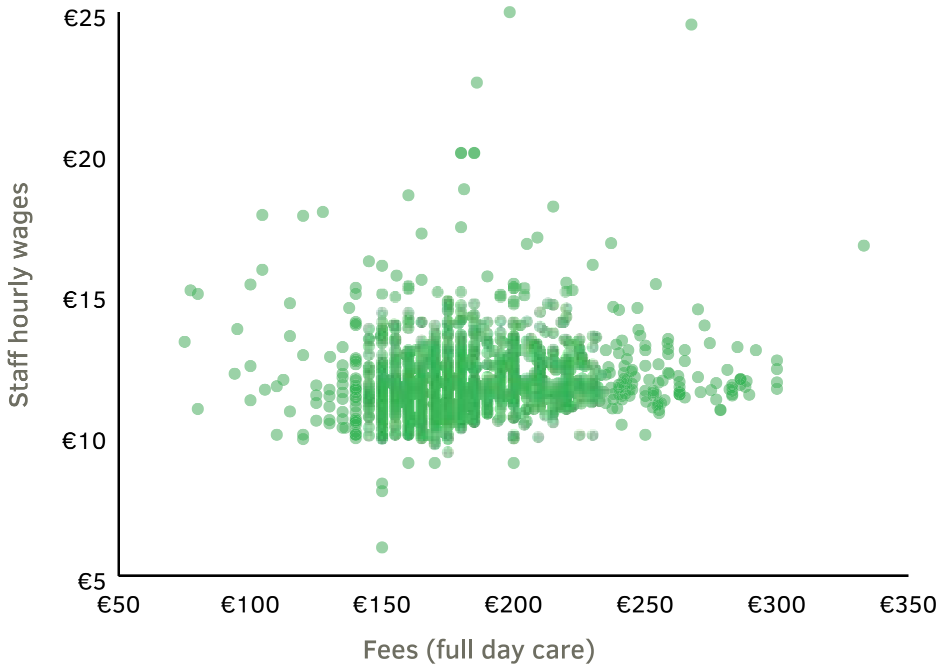
Figure 7.21 Average hourly wage rate by length of service in the ELC and SAC sector



7.15.9 Wages and fees

A baseline analysis was carried out to examine the degree of correlation between full day fees (because these fees are most representative of fees levels) and the average wages for each service. The plot in Figure 7.22 shows the average wage stays around €12 per hour for all fee bands, and thus there is no visual indication of any correlation. A statistical model returned the same conclusion with a correlation factor of only 1%, which means that a correlation between wages and fees cannot be found.

Figure 7.22 Scatterplot to test for any relationship between fees and wages



7.16 Staff turnover

The data presented in Section 7.9 suggests considerable levels of inter-service mobility or staff turnover. An analysis was undertaken to identify the rate of staff turnover in childcare services. The methodology used to establish the turnover rate for each facility involved factoring out any possible reduction or expansion in staff numbers. Four data types were used to calculate turnover:

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

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

In the twelve months up to June 2019, the annual staff turnover rate was 23.4%. This is down 1.3 percentage points on last year's figure of 24.7%. Table 7.14 shows the average rates of staff turnover by county. The highest rate was in Dún Laoghaire-Rathdown (36%) and the lowest in Kilkenny (15%).

Table 7.14 Average staff turnover rates per county

County	Average turnover rate
Dublin – Dún Laoghaire-Rathdown	36.1%
Dublin – Dublin City	26.1%
Clare	25.6%
Longford	25.2%
Cork City	24.8%
Donegal	24.8%
Louth	24.5%
Roscommon	24.4%
Dublin - Fingal	24.1%
Galway	24.0%
Mayo	24.0%
Wexford	23.4%
Cork County	23.3%
Kerry	22.9%
Sligo	22.5%
Westmeath	22.5%
Laois	22.2%
Carlow	22.1%
Kildare	22.1%
Limerick	22.1%
Tipperary	22.0%
Leitrim	21.4%
Meath	21.4%
Monaghan	21.2%
Dublin – South Dublin	21.1%
Waterford	20.7%
Offaly	20.3%
Wicklow	18.7%
Cavan	17.5%
Kilkenny	15.1%
Average overall	**23.4%**

Respondents were asked for details in relation to staff retention and the destinations of the staff who leave employment in an ELC/SAC service. As Table 7.15 shows, the majority of services (59%) retained all their staff during the twelve months up to the completion of the survey. The highest retention rates are in the private services and in rural areas. The survey responses also reveal that 20% of services lost one staff member, while 21% lost two or more staff members.

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

	Community	Private	Urban	Rural	All
Retained all staff	55%	60%	55%	66%	59%
Lost 1 staff member	23%	19%	20%	20%	20%
Lost 2 or 3	17%	13%	16%	11%	14%
Lost more than 3	5%	8%	9%	3%	7%

Services reported 3,888 staff leaving employment in their facility. When asked about the destinations of staff who had left, respondents indicated that 37% had gone to another ELC/SAC service, 39% (1,527) had left the sector, 12% had left Ireland and respondents were unsure of the destinations of the remaining 12%.

For the first time in 2018/19, services were asked to indicate the level of qualification of staff that left. Of the 3,888 staff who left, 93% had an NFQ Level 5 qualification or above, 4% had an NFQ Level 4 or no relevant formal qualification and services stated that they did not know the level of qualification for 3% of staff that left (see Table 7.16). There were no significant differences between the percentages of staff that left community or private services or services located in urban or rural areas.

Table 7.16 Level of qualification of staff who left in the past 12 months by organisation type and urban/rural location

	Community	Private	Urban	Rural	Total
Total number of staff who left	**920**	**2,968**	**3,015**	**873**	**3,888**
% of services with staff that left in last 12 months	**45%**	**40%**	**45%**	**35%**	**42%**
% of staff who left in last 12 months by level of qualification:					
NFQ Level 4 or no relevant qualification	10%	3%	4%	4%	4%
NFQ Level 5	29%	28%	28%	29%	28%
NFQ Level 6	32%	33%	33%	36%	34%
NFQ Level 7 or above	27%	32%	32%	28%	31%
Don't know	2%	4%	3%	3%	3%

7.17 Staff vacancies

Of the 3,821 facilities that responded to the survey, 23% (880) reported having at least one staff vacancy. This is down from 26% in 2017/18. The total number of vacancies reported by survey respondents was 1,567.

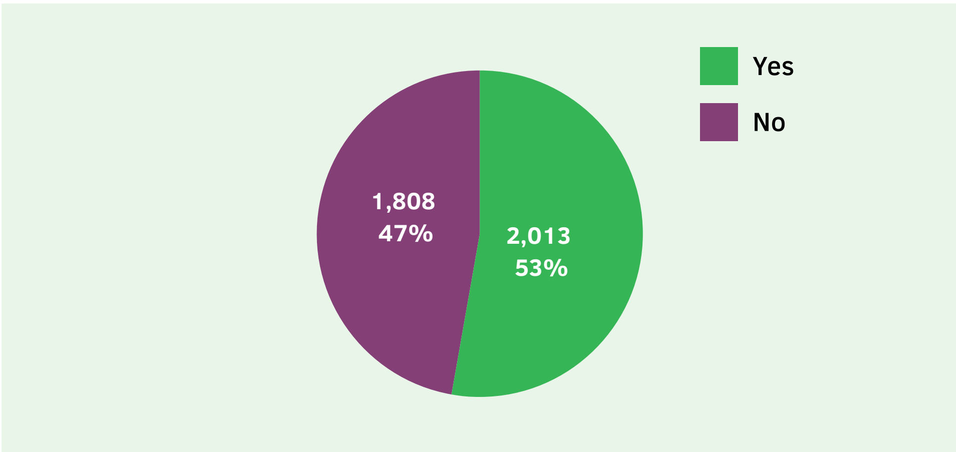
Also for the first time in 2018/19, respondents were asked to categorise the number of vacancies in their service by specific staff qualifications, including AIM Level 7 Support (see Table 7.17). The majority of vacant positions were for staff with NFQ Level 5 or Level 6 qualifications, at 33% each or 514 and 513 staff members, respectively. 157 services were looking to fill 182 positions of AIM Level 7 Support staff.

Table 7.17 Number and percentage of staff vacancies by level of qualification

	No. of staff	No. of services	% of staff	% of services overall
NFQ Level 5	514	352	33%	40%
NFQ Level 6	513	405	33%	46%
NFQ Level 7 or above	358	281	23%	32%
AIM Level 7 Support	182	157	12%	18%
Total	**1,567**	**880**	**100%**	**100%**

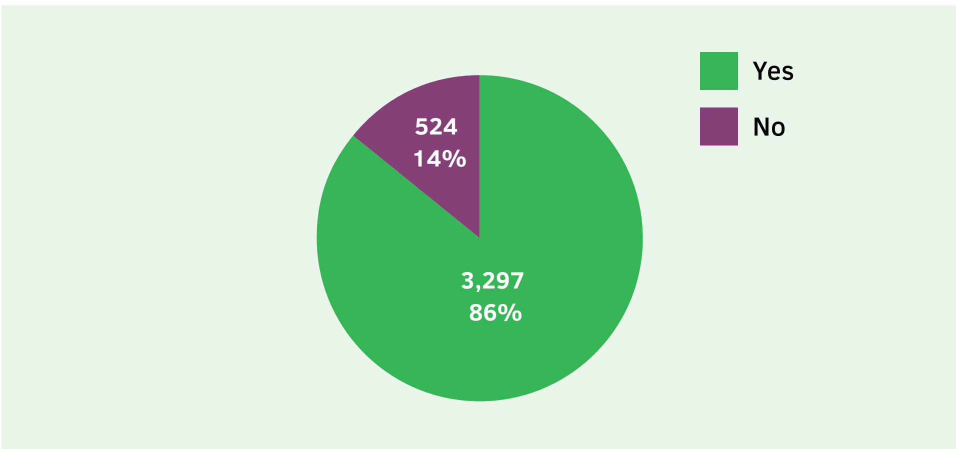
Services were also asked if they had experienced challenges in recruiting suitably qualified staff over the past twelve months. More than half of services (53% or 2,013) experienced such challenges (see Figure 7.23). This is down 4% on 2017/18.

Figure 7.23 Services that experienced challenges in relation to recruiting suitably qualified staff in last twelve months



In addition, services were asked if they had actively recruited/advertised for staff living overseas in the past 12 months and 14% of services stated that they had, see Figure 7.24.

Figure 7.24 Services that actively recruited / advertised for staff living overseas in the past twelve months



8 Child protection

Child protection

Over half of services need further support and training in child protection

(54%)

5% less than last year

72%

of staff had received *Children First* training, an **increase of 2%** from the previous year

Nearly every service reported having a Child Protection Policy in place

(99.6%)

8.1 Introduction

Better Outcomes, Brighter Futures: The national policy framework for children and young people 2014–2020, *Children First Act 2015* and *First 5: A whole of government strategy for babies, young children and their families 2019–2028* include provisions on child safety. These provisions aim to ensure that all children and young people have a secure, stable and caring home environment; are safe from abuse, neglect and exploitation; are protected from bullying and discrimination; and are safe from crime and anti-social behaviour.

Guidelines, such as *Children First: National guidance for the protection and welfare of children* (DCYA, 2017), and best practice standards under which the sector operates represent one element in the attainment of this policy goal. As part of these regulations, Early Learning and Care (ELC) and School-Age Childcare (SAC) providers are required to develop a Child Safeguarding Statement. This is a written statement that specifies the service being provided and the principles and procedures to be observed to ensure, as far as predictable, that a child availing of the service is safe from harm. Staff, particularly those working directly with children, should also receive adequate training to allow them to recognise and understand the signs of abuse or neglect.

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

Table 8.1 Percentage of services with safeguarding statement on display, written policy and staff trained in child protection

	Community	Private	All
% of services with a Child Safeguarding Statement on display	98.9%	97.5%	97.9%
% of services with a Child Protection Policy in place	99.5%	99.6%	99.6%
% of staff trained in Children First in last 3 years*	73.1%	71.8%	72.2%
% of services reported needing more support	59.0%	53.4%	54.9%

*Total percentage of staff working directly with children (excluding relief/cover staff) and ancillary staff.

8.2 Child Safeguarding Statement

The vast majority of respondents reported having a Child Safeguarding Statement on display (3,741 or 97.9%). The county breakdown shows that 100% of respondents in six counties reported they had a Child Safeguarding Statement on display. In a further 23 counties the share of services was between 99% and 96%. The lowest percentages were recorded in counties Waterford (95.3%) and Laois (95.6%).

8.3 Child Protection Policy

In line with the *Children First Act*, respondents were asked whether or not they had a written Child Protection Policy in place and, if so, to specify the date on which the policy was last reviewed. A total of 99.6% (3,804) services reported having such a policy. Of the respondents who provided details of the date when the policy was last reviewed, 99.6% of services reviewed their policy within the last three years (May 2016 – May 2019).

8.4 Child protection training

Children First: National guidance for the protection and welfare of children (DCYA, 2017) states that all persons working directly with children have a duty of care to protect them from harm and to promote their welfare. To do so, they should be equipped with the appropriate knowledge and tools to initiate the requisite steps if and when signs of abuse or neglect are observed. In this context, the survey asked services to specify how many of their staff, if any, had received *Children First* training in the preceding three years. Over seven in ten (72.2%) staff had received training within that period (Table 8.1), an increase from 69.9% in 2017/18.

The figure for community services (73.1%) is slightly higher than for private services (71.8%), although both have increased since last year when the percentages were 70.8% and 69.4%, respectively.

Longford (83.5%), Cavan (80.7%), Westmeath (80.3%), Offaly (79.7%) and Kerry (79.2%) had the highest numbers of staff trained in *Children First*, while services in Kilkenny reported the lowest share of staff (60.3%) who received *Children First* training (see Table 8.3). In 19 counties, the proportion of staff who received *Children First* training increased since last year. The largest percentage increases were observed in Donegal (9.3%), Cavan (8.7%) and Meath (8.0%). A reduction in the percentage of staff who received training was noted in 11 counties, with the largest reduction of 11.2% recorded in Sligo.

8.5 Further support with child protection

Respondents were also asked to state whether or not staff in their service required further training and support in the area of child protection, and if '*Yes*', to state the type of training and support required. Respondents were presented with a prescribed list, which included '*Other*' and '*No further support/training is required at this time*'. They were invited to select all applicable options from the list (see Table 8.2).

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

	Community		Private		All	
Further support and training options	**Number**	**%**	**Number**	**%**	**Number**	**%**
Number of services requiring further support and training	607	59.0%	1,492	53.4%	2,099	54.9%
Number of services not requiring further support/ training at this time	422	41.0%	1,300	46.6%	1,722	45.1%
Of the services requiring further support and training (2,099), the following was specified:						
Developing or updating a Child and Welfare Protection Policy	123	20.3%	341	22.9%	464	22.1%
Training in Children First	326	53.7%	762	51.1%	1,088	51.8%
Training for the Designated Liaison Person	286	47.1%	594	39.8%	880	41.9%
Garda vetting for staff	35	5.8%	86	5.8%	121	5.8%
Development of a code of behaviour for working with children	206	33.9%	403	27.0%	609	29.0%
Other	154	25.4%	424	28.4%	578	27.5%

Of all respondents to the survey, more than half (54.9%) stated that staff in their service required further training and/or support in relation to child protection, representing a reduction of 4.3% since last year. More community services required further training/support (59.0%) than their private counterparts (53.4%). This represents a reduction of 2.9% and 4.7%, respectively, from the previous year.

As in previous years, the largest share of services (52%) required training in *Children First,* a reduction of 3% since last year, followed by training for the Designated Liaison Person (42%), an increase of 1% since last year. As was the case in 2017/18, training or support on the development of a code of behaviour for working with children was the third highest training need identified (29%), a decrease of 4% since last year.

The percentage of services selecting '*No further support/training is required at this time*' increased by 4.3% (from 40.8% in 2017/18 to 45.1% in this year). In eight counties, 60% or more of services indicated the need for further support/training (Roscommon, Wexford, Louth, Galway, Mayo, Dublin City, Laois and Monaghan). Roscommon was the county with the highest number of services who required further support and training (68.5%) while Longford had the lowest percentage (34.4%).

Table 8.3 Percentage of services by county with Child Safeguarding Statement on display, written policy and staff trained in child protection

County	% with Child Safeguarding Statement on display	% with Child Protection Policy in place	% of staff with Children First training in last 3 years	% of services who require further training and support
Carlow	97.8%	100.0%	69.0%	55.6%
Cavan	96.5%	100.0%	80.7%	49.1%
Clare	96.0%	100.0%	75.5%	42.1%
Cork City	97.6%	100.0%	72.4%	50.0%
Cork County	97.3%	99.4%	66.1%	57.2%
Donegal	99.1%	100.0%	70.7%	56.5%
Dublin – Dublin City	98.1%	99.7%	74.0%	61.5%
Dublin – Dún Laoghaire-Rathdown	99.3%	100.0%	71.4%	55.5%
Dublin – Fingal	96.6%	100.0%	73.9%	55.7%
Dublin – South Dublin	96.9%	99.0%	78.1%	56.0%
Galway	99.6%	99.6%	63.3%	62.3%
Kerry	98.2%	100.0%	79.2%	53.6%
Kildare	99.4%	100.0%	75.7%	50.6%
Kilkenny	96.6%	100.0%	60.3%	57.3%
Laois	95.6%	98.5%	72.4%	60.3%
Leitrim	100.0%	100.0%	78.0%	54.5%
Limerick	96.8%	98.1%	73.5%	42.7%
Longford	100.0%	100.0%	83.5%	34.4%
Louth	98.1%	100.0%	65.3%	63.8%
Mayo	98.1%	100.0%	62.4%	62.0%
Meath	98.8%	99.4%	76.6%	44.6%
Monaghan	100.0%	100.0%	78.5%	60.0%
Offaly	100.0%	100.0%	79.7%	39.7%
Roscommon	100.0%	98.1%	74.4%	68.5%
Sligo	97.0%	97.0%	70.2%	53.0%
Tipperary	97.5%	100.0%	70.3%	57.2%
Waterford	95.3%	98.8%	74.0%	50.0%
Westmeath	100.0%	100.0%	80.3%	52.1%
Wexford	99.2%	99.2%	62.7%	64.5%
Wicklow	96.5%	99.3%	71.9%	48.6%
Total	**98.0%**	**99.6%**	**72.2%**	**55.0%**

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Appendices

Appendix I Number of children enrolled, on waiting lists and number of vacant places by county

County	Children enrolled	Vacant places	Waiting list
Carlow	2,377	231	249
Cavan	3,380	156	395
Clare	4,403	395	322
Cork City	4,252	183	940
Cork County	15,390	1,021	1,272
Donegal	7,030	829	890
Dublin – Dublin City	16,105	627	4,089
Dublin – Dún Laoghaire-Rathdown	7,023	173	892
Dublin – Fingal	11,142	536	1,698
Dublin – South Dublin	9,318	424	1,014
Galway	10,679	749	1,074
Kerry	5,506	286	199
Kildare	9,215	516	694
Kilkenny	3,923	110	652
Laois	3,162	378	40
Leitrim	1,557	97	180
Limerick	7,499	421	1,074
Longford	1,749	38	254
Louth	4,837	327	415
Mayo	4,138	362	211
Meath	7,297	679	458
Monaghan	3,818	250	205
Offaly	2,845	134	93
Roscommon	2,766	77	207
Sligo	3,482	205	183
Tipperary	6,776	431	424
Waterford	4,537	186	1,065
Westmeath	3,505	330	257
Wexford	5,708	286	312
Wicklow	4,551	298	245
Total	**177,970**	**10,735**	**20,003**

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

County	Children enrolled: Community	Private	Urban	Rural	Overall	No. of services with (>=1) child enrolled	Average enrolled per facility
Carlow	1,279	1,098	1,396	981	2,377	45	53
Cavan	1,605	1,775	2,042	1,338	3,380	57	59
Clare	1,761	2,642	2,202	2,201	4,403	126	35
Cork City	2,200	2,052	4,252		4,252	84	51
Cork County	4,148	11,242	9,143	6,247	15,390	334	46
Donegal	2,842	4,188	3,904	3,126	7,030	115	61
Dublin - Dublin City	6,645	9,405	16,050		16,050	364	44
Dublin - Dún Laoghaire-Rathdown	1,023	6,000	6,957	66	7,023	146	48
Dublin - Dublin Fingal	789	10,353	10,280	862	11,142	264	42
Dublin - South Dublin	1,700	7,673	9,373		9,373	193	49
Galway	3,341	7,338	5,402	5,277	10,679	223	48
Kerry	2,726	2,780	2,416	3,090	5,506	112	49
Kildare	472	8,743	7,266	1,949	9,215	172	54
Kilkenny	1,210	2,713	2,445	1,478	3,923	89	44
Laois	1,163	1,999	2,133	1,029	3,162	68	47
Leitrim	911	646	414	1,143	1,557	33	47
Limerick	2,225	5,274	4,632	2,867	7,499	157	48
Longford	998	751	657	1,092	1,749	32	55
Louth	1,136	3,701	3,810	1,027	4,837	105	46
Mayo	1,878	2,260	1,601	2,537	4,138	108	38
Meath	1,558	5,739	5,812	1,485	7,297	168	43
Monaghan	2,426	1,392	1,467	2,351	3,818	55	69
Offaly	590	2,255	1,711	1,134	2,845	68	42
Roscommon	1,188	1,578	1,025	1,741	2,766	54	51
Sligo	1,794	1,688	1,915	1,567	3,482	66	53
Tipperary	1,985	4,791	3,965	2,811	6,776	159	43
Waterford	2,009	2,528	3,115	1,422	4,537	86	53
Westmeath	1,099	2,406	2,497	1,008	3,505	73	48
Wexford	2,108	3,600	2,382	3,326	5,708	121	47
Wicklow	879	3,672	3,047	1,504	4,551	144	32
Total	**55,688**	**122,282**	**123,311**	**54,659**	**177,970**	**3,821**	**47**

Appendix III Average fees by age range and type of care at county level – part I (0–3 years)

	Up to 1 year			1 year+ to 2 years			2 years+ to 3 years		
County	Full day	Part-time	Sessional	Full day	Part-time	Sessional	Full day	Part-time	Sessional
Carlow	€158.69	€90.60	€89.57	€155.32	€91.64	€80.00	€148.56	€92.36	€71.95
Cavan	€163.24	€96.84	€67.29	€163.95	€98.26	€68.00	€163.10	€96.96	€68.96
Clare	€167.79	€98.72	€77.47	€166.43	€97.60	€77.60	€166.46	€96.75	€72.27
Cork City	€212.92	€123.22	€86.25	€201.63	€114.14	€81.93	€199.36	€112.49	€80.50
Cork County	€210.29	€141.57	€84.11	€204.72	€134.43	€84.02	€200.18	€126.36	€77.08
Donegal	€169.58	€101.25	€72.63	€168.27	€99.69	€70.28	€168.60	€100.09	€61.96
Dublin - Dublin City	€220.79	€135.30	€83.37	€215.50	€133.10	€88.17	€209.87	€131.37	€80.85
Dublin - Dún Laoghaire-Rathdown	€265.16	€188.32	€119.30	€258.40	€172.83	€100.65	€251.31	€144.32	€89.20
Dublin - Fingal	€235.62	€147.26	€102.19	€223.76	€140.94	€87.94	€216.03	€129.40	€77.45
Dublin - South Dublin	€230.40	€154.53	€109.26	€220.15	€143.76	€104.25	€215.93	€132.77	€88.43
Galway	€170.36	€116.47	€78.10	€166.33	€108.51	€74.67	€165.04	€107.34	€72.44
Kerry	€175.74	€97.07	€70.05	€178.54	€99.34	€66.59	€173.36	€95.77	€64.59
Kildare	€220.63	€168.69	€90.90	€207.03	€135.03	€88.56	€200.99	€121.99	€79.90
Kilkenny	€161.00	€115.36	€66.90	€167.45	€105.23	€69.08	€170.84	€103.25	€70.54
Laois	€174.73	€122.00	€83.18	€167.74	€113.13	€79.88	€163.38	€105.79	€72.87
Leitrim	€156.00	€109.00	€82.50	€152.86	€94.17	€72.90	€153.75	€90.63	€69.95
Limerick	€172.93	€116.87	€86.23	€168.26	€110.62	€80.53	€164.85	€102.70	€72.77
Longford	€160.00	€99.44	€67.19	€156.36	€97.50	€62.50	€155.00	€95.00	€63.65
Louth	€189.96	€119.73	€76.94	€177.83	€112.47	€77.89	€174.13	€110.96	€73.47
Mayo	€166.67	€109.57	€79.88	€161.05	€100.54	€78.00	€161.05	€98.56	€66.30
Meath	€196.18	€122.80	€78.00	€192.34	€118.11	€75.11	€188.67	€113.65	€76.19
Monaghan	€155.38	€87.88	€65.50	€155.79	€87.08	€63.90	€153.54	€84.35	€63.98
Offaly	€188.69	€137.50	€83.13	€168.95	€113.25	€77.78	€165.63	€107.38	€71.59
Roscommon	€165.68	€107.25	€85.61	€162.34	€100.83	€79.27	€157.44	€94.19	€70.25
Sligo	€174.00	€112.78	€82.00	€156.85	€100.24	€70.61	€155.35	€98.70	€71.85
Tipperary	€166.23	€100.24	€76.81	€160.54	€99.97	€70.33	€157.99	€97.42	€68.99
Waterford	€170.42	€100.17	€78.14	€168.33	€99.97	€74.70	€164.41	€99.29	€70.55
Westmeath	€181.68	€127.81	€88.61	€175.57	€115.01	€79.37	€171.77	€102.71	€74.43
Wexford	€170.63	€99.58	€77.45	€170.34	€101.84	€73.82	€166.90	€101.15	€73.09
Wicklow	€213.44	€139.73	€66.25	€204.64	€124.00	€84.76	€202.28	€126.96	€79.56
National average fee for age range	**€195.51**	**€122.33**	**€81.20**	**€189.68**	**€116.83**	**€79.16**	**€186.01**	**€112.96**	**€74.92**

Appendix III Average fees by age range and type of care at county level – part II (3+ to 6 years)

	3 years+ to 4 years			4 years+ to 5 years			5 years+ to 6 years		
County	Full day	Part-time	Sessional	Full day	Part-time	Sessional	Full day	Part-time	Sessional
Carlow	€148.56	€91.20	€73.14	€148.56	€91.20	€73.08	€143.75	€87.15	€68.50
Cavan	€162.40	€95.76	€68.36	€162.40	€92.37	€68.09	€158.37	€89.09	€67.51
Clare	€167.09	€95.46	€69.62	€167.50	€95.32	€69.73	€157.57	€92.44	€68.67
Cork City	€197.65	€111.81	€78.30	€198.97	€113.31	€76.44	€193.73	€117.71	€72.48
Cork County	€198.06	€121.05	€75.31	€196.72	€120.90	€75.44	€187.82	€117.50	€76.14
Donegal	€168.27	€98.31	€64.72	€168.27	€99.58	€65.26	€162.50	€97.60	€64.42
Dublin – Dublin City	€207.90	€127.92	€79.06	€207.39	€126.99	€78.18	€195.31	€128.65	€78.69
Dublin – Dún Laoghaire-Rathdown	€247.68	€131.81	€86.43	€242.16	€127.67	€83.78	€205.18	€131.18	€90.37
Dublin – Fingal	€213.45	€123.13	€75.18	€212.21	€125.23	€76.44	€184.11	€118.76	€83.90
Dublin – South Dublin	€213.96	€130.14	€79.95	€213.39	€131.37	€80.29	€193.59	€125.04	€84.94
Galway	€162.95	€105.56	€70.78	€161.96	€104.86	€70.62	€156.28	€100.31	€71.37
Kerry	€173.53	€99.44	€64.95	€173.53	€98.04	€65.09	€170.29	€92.25	€63.44
Kildare	€199.82	€119.68	€75.26	€196.73	€117.98	€76.04	€181.48	€117.43	€78.71
Kilkenny	€167.92	€98.48	€69.58	€165.48	€96.83	€69.08	€161.00	€99.62	€68.51
Laois	€163.23	€106.50	€72.53	€163.23	€108.95	€71.14	€159.95	€107.37	€76.06
Leitrim	€152.50	€90.63	€66.82	€152.50	€91.88	€67.38	€135.71	€80.83	€69.71
Limerick	€161.25	€100.57	€71.07	€158.38	€101.90	€71.27	€150.48	€97.88	€72.59
Longford	€155.00	€91.00	€65.94	€153.33	€89.83	€66.45	€147.00	€85.18	€64.59
Louth	€172.51	€108.26	€70.68	€171.03	€108.09	€72.44	€165.68	€105.03	€75.53
Mayo	€156.20	€95.82	€67.37	€156.33	€102.68	€67.36	€154.41	€98.50	€65.44
Meath	€183.62	€112.44	€73.11	€183.51	€111.48	€73.47	€166.76	€106.81	€75.02
Monaghan	€153.25	€83.91	€64.76	€152.48	€82.88	€63.41	€145.87	€78.43	€60.17
Offaly	€164.35	€104.44	€70.07	€164.26	€106.14	€68.61	€153.60	€102.05	€68.29
Roscommon	€155.47	€95.28	€68.99	€152.01	€89.77	€68.99	€147.55	€87.16	€66.59
Sligo	€156.98	€98.00	€72.15	€157.30	€95.65	€72.00	€148.00	€90.27	€69.38
Tipperary	€155.95	€95.49	€68.31	€155.82	€94.80	€68.35	€152.49	€90.39	€69.62
Waterford	€161.69	€102.39	€69.99	€161.42	€99.36	€70.03	€156.09	€95.67	€69.55
Westmeath	€170.39	€98.23	€72.91	€171.58	€96.57	€71.62	€164.14	€97.68	€69.85
Wexford	€165.83	€102.00	€72.54	€166.30	€101.67	€72.51	€170.13	€100.08	€73.27
Wicklow	€196.91	€118.91	€78.90	€208.09	€120.60	€79.62	€183.72	€117.44	€81.27
National average fee for age range	**€184.39**	**€110.48**	**€73.14**	**€183.43**	**€109.73**	**€73.03**	**€169.64**	**€105.50**	**€73.49**

Appendix IV Staff working directly with children – type of employment by county[47]

	CE – Community Employment*	CSP – Community Service Programme*	JI – Job Initiative Scheme*
	Total	Total	Total
Carlow	32	1	0
Cavan	40	0	3
Clare	5	0	1
Cork City	45	1	2
Cork County	49	2	1
Donegal	61	0	0
Dublin – Dublin City	158	28	20
Dublin – Dún Laoghaire-Rathdown	22	0	0
Dublin – Fingal	31	9	0
Dublin – South Dublin	35	11	2
Galway	23	0	0
Kerry	44	1	0
Kildare	8	0	0
Kilkenny	19	0	0
Laois	17	0	0
Leitrim	10	12	0
Limerick	48	0	3
Longford	34	1	0
Louth	70	42	3
Mayo	23	1	0
Meath	32	1	0
Monaghan	58	0	3
Offaly	6	1	0
Roscommon	14	6	0
Sligo	45	6	0
Tipperary	24	0	0
Waterford	37	0	0
Westmeath	36	4	2
Wexford	25	5	1
Wicklow	24	14	0
Total	**1,075**	**146**	**41**

*These schemes are in community services only.

Note: *Other* includes YESS - Youth Employment Support Scheme and JobsPlus.

47 Appendix IV excludes relief staff.

Tús*	Directly employed staff			Other		
Total	Community	Private	Total	Community	Private	Total
0	141	141	282	1	3	4
1	181	190	371	2	3	5
0	269	320	589	1	4	5
1	260	265	525	0	0	0
2	503	1,255	1,758	1	5	6
4	293	446	739	0	6	6
7	970	1,401	2,371	1	9	10
1	147	931	1,078	0	2	2
4	111	1,327	1,438	0	2	2
8	221	1,020	1,241	0	6	6
4	369	853	1,222	1	6	7
3	319	329	648	2	5	7
	54	1,030	1,084	0	6	6
3	148	300	448	1	8	9
1	111	246	357	0	4	4
0	81	83	164	0	2	2
0	267	641	908	1	3	4
1	105	86	191	0	6	6
0	109	444	553	1	1	2
2	202	278	480	0	0	0
0	177	702	879	0	3	3
1	255	186	441	7	1	8
2	82	257	339	0	0	0
0	125	188	313	0	0	0
3	174	206	380	1	0	1
7	266	547	813	0	4	4
1	239	280	519	1	1	2
5	139	253	392	0	3	3
2	234	402	636	0	0	0
0	76	510	586	0	6	6
63	**6,628**	**15,117**	**21,745**	**21**	**99**	**120**

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

	Urban		Rural		All	
Total staff by urban/rural	**16,613**	**72%**	**6,577**	**28%**	**23,190**	**100%**
NFQ Level 5 or above	15,500	93%	6,236	95%	21,736	94%
NFQ Level 6 or above	11,015	66%	4,497	68%	15,512	67%
No relevant qualification	1,036	6.2%	319	4.9%	1,355	5.8%
NFQ Level 4 Award	77	0.5%	22	0.4%	99	0.6%
NFQ Level 5 Award	4,485	27.0%	1,739	26.4%	6,224	26.8%
NFQ Level 6 Award	6,781	40.8%	2,922	44.4%	9,703	41.8%
NFQ Level 7 Award (Ordinary Degree)	1,273	7.7%	467	7.1%	1,740	7.5%
NFQ Level 8 Award (Honours Degree)	2,716	16.3%	1,029	15.6%	3,745	16.1%
NFQ Level 9/10 Award (Masters/PhD)	245	1.5%	79	1.2%	324	1.4%

For more information contact:
Pobal, Holbrook House, Holles Street, Dublin 2, D02 EY84, Ireland
Pobal, Teach Holbrook, Sráid Holles, Baile Átha Cliath 2, D02 EY84, Éire

T: +353 1 511 7000
E: research@pobal.ie
W: www.pobal.ie