

## **Experiences of Childcare Providers in Northern Ireland**

**April 2018**



## About Employers For Childcare

Employers For Childcare is a registered charity which aims to make it easier for parents with dependent children to get into work and to stay in work.

Research, Policy and Lobbying: we undertake research to provide us with the evidence to lobby Government on childcare, family and work-related issues, striving to ensure that the voices of parents, childcare providers and employers are heard when policy decisions are being made. We engage with policy makers and political representatives across the UK, from the Northern Ireland Assembly to Westminster.

Family Benefits Advice Service: our specialist Advisors carry out personalised benefits checks and better-off calculations to ensure that every parent is claiming all the financial help they are entitled to, particularly towards the cost of childcare. We also deal with queries on childcare and work-related issues through a Freephone helpline used by thousands of parents, employers and childcare providers across the UK, and deliver face-to-face events, presentations, seminars, and publish information and research.

**Employers For Childcare would like to acknowledge the support of the Northern Ireland Childcare Partnerships in their work.**

## About this research

This research was designed, implemented and analysed by Employers For Childcare. This research opened on 23 May 2017 with a paper survey circulated to childcare providers across Northern Ireland and an online survey available. The survey closed on 30 June 2017 and received 716 responses. We also conducted 28 in depth interviews with childcare providers across different Trust areas on their experiences, highlighting any positive experiences or challenges that they may face in providing childcare. Providers represented private, community and voluntary and social economy run facilities.

## Contents

<b>Key findings</b>	<b>4</b>
.....	
<b>Section 1: Introduction</b>	<b>6</b>
.....	
<b>Section 2: Organisation information and profile</b>	<b>7</b>
.....	
<b>Section 3: Financial stability and sustainability</b>	<b>10</b>
.....	
<b>Section 4: Training</b>	<b>18</b>
.....	
<b>Section 5: Main challenges</b>	<b>20</b>
.....	
<b>Section 6: What is working well</b>	<b>21</b>
.....	
<b>Section 7: Regulatory environment</b>	<b>22</b>
.....	
<b>Section 8: Attitudes towards working in the sector</b>	<b>27</b>
.....	
<b>Section 9: Conclusions</b>	<b>30</b>
.....	
<b>Appendix 1: Methodology</b>	<b>32</b>

## Key findings

### Financial stability and sustainability

- 59% of childcare providers reported breaking even or making a loss in the last financial year
- 77% of childcare providers had kept fees the same in the previous 12 months
- 21% had increased their fees with key reasons including the cost of food, materials and equipment, rising staff costs, and the impact of the National Minimum and Living Wages
- Looking back, while 56% reported their overall expenditure had gone up, just 26% reported an increase in their income
- Looking forward, 42% anticipate their expenditure will increase in the coming year, with just 23% anticipating income will increase
- This is not sustainable, and while providers do not want to increase fees, they have to balance the cost of delivering childcare with their income
- Looking forward, a quarter of providers anticipate their economic situation will worsen, compared to one fifth who feel their economic situation will improve.

*“Due to increase in minimum wage we will have to look at our prices next year, with a view to increasing costs.” (Private Day Nursery, Western Health and Social Care Trust, 10-20 staff)*

### Training

- 88% of providers reported they or their staff had accessed training in the last year
- Where providers had not accessed training, reasons given included the location, timing and cost of training
- Providers in more rural areas in particular highlighted issues with accessing training
- It was recommended that online training should be made available to reduce costs and accommodate working hours.

*“Online training would be excellent. I work long hours every day and then have my own family to look after.” (South Eastern Health and Social Care Trust, childminder)*

### Challenges

- The top five challenges identified by providers were:
  - Securing sufficient income to cover expenditure (47%)
  - Financial sustainability (46%)
  - Competition from other providers (39%)
  - Maintaining occupancy of places (39%)
  - Inspections (38%)
- A range of providers also referred to the challenge of competing with unregistered childminders and changes in the nature of childcare required by parents as their working patterns evolve or they combine formal childcare with informal childcare, for example, grandparents.

*“Have had to decrease 80p an hour - down to unregistered childminders offering unsustainable prices.” (South Eastern Trust, childminder)*

### What is working well

- The key thing working well for childcare providers is their liaison with parents, identified by 74% of respondents
- Providers also referred to the high standard of care that is delivered in Northern Ireland, and support that they receive from membership organisations, statutory bodies and advice giving charities.

### Regulatory environment

- Childcare providers had a mixed approach to the regulatory environment and minimum standards
- On a positive note, the minimum standards were identified as providing a guide to promote high quality care and offer reassurance for parents
- However, providers also reported their negative experiences in terms of confusion over how to apply the standards which, for some, resulted in fear and a lack of understanding
- A number perceived a lack of consistency in the application of the standards and some had experienced a turnover in social work inspectors
- Some providers had a perception that there can be a focus on paperwork at the expense of childcare provision itself.

*“It is a very good thing, you know the dos and don'ts with the Minimum Standards. If you aren't sure about something you can lift the standards.” (Southern Health and Social Care Trust, community out of school club)*

*“The idea behind it is good and helpful but the delivery is sometimes inconsistent and frustrating.” (Belfast Health and Social Care Trust, community day nursery)*

### Attitudes towards working in the sector

- The majority of providers interviewed would recommend a career in childcare, finding it a rewarding profession that allows them to support and observe the development of children and enjoy a positive relationship with parents
- However, providers also perceive the profession is not always given the value or recognition it deserves with many workers on low pay and concerned about a lack of progression.

*“How lovely is it to have children in your home and know that they will remember happy times with a childminder.” (Northern Trust, childminder)*

*“It doesn't get the recognition it deserves and we are underpaid. Have been called a babysitter before.” (Northern Trust, private day nursery)*

## Section 1: Introduction

The purpose of this research was to highlight the experiences of childcare providers in Northern Ireland who are vital to providing care, early education and development for children as well as supporting parents to get into and stay in work.

Each year Employers For Childcare publishes the Northern Ireland Childcare Cost Survey charting the cost of childcare and the impact this has on families. The most recent report, published in March 2018, highlights that the overwhelming majority (87%) of parents are positive about the quality of childcare provision.<sup>1</sup> They recognise the valuable experience their children receive and the important role childcare staff play in their children's lives.

In reflecting on the cost of childcare to parents, it is important to put this in context with what it costs to deliver childcare. Childcare providers can only deliver childcare where it is financially sustainable for them to do so. This research found that 59% of providers reported that they were either just breaking even or making a loss in the last financial year. Even so, the majority - 77% - had kept their fees the same, despite rising costs. Concerned about increasing fees and the potential impact on parents, many have tried to absorb the costs and minimise the impact.

For some providers, increases in the National Living and Minimum Wages, as well as pension obligations, have resulted in higher staff costs. For many, the rising cost of living in terms of food, heating, materials and equipment is impacting on them. On top of these, there are rent and mortgage bills, rates and insurance, and the cost of building upkeep. In December 2017, it was reported that the annual inflation rate had more than doubled from 1.2% to 3.1% in the previous year, its highest level since March 2012. The Office for National Statistics reported that toys were 6.1% more expensive, food prices 4.4% higher, and heating and electricity up 6.4% compared to figures from the previous year.<sup>2</sup>

At the same time, childcare providers are still getting to grips with the introduction of the Minimum Standards in 2012, and a rigorous regulatory and inspection environment, whilst dealing with day to day challenges such as securing business, attracting and retaining staff, and accessing training and development opportunities. Nevertheless, childcare providers reported the rewards of their work including supporting and watching children develop, and building good relationships with parents.

At the time of writing, Northern Ireland is without a childcare strategy, without an Executive, and parents and childcare providers are looking into the face of welfare reform, rising costs of living, uncertainty arising from Brexit and changes in the landscape of financial support for childcare. This report provides robust evidence highlighting issues which must be addressed and we call for strategic investment in a childcare system that both enables parents to access and stay in paid work, education or training, and recognises the value of childcare and those employed within the sector.

**Thank you!**

We would like to thank each of the childcare providers who responded to the survey or generously took the time to participate in an interview. This report highlights the challenges you have shared with us, but also the passion and dedication with which you deliver high quality care and education to children and young people in Northern Ireland.

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<sup>1</sup> [www.employersforchildcare.org/report/northern-ireland-childcare-cost-survey-2017/](http://www.employersforchildcare.org/report/northern-ireland-childcare-cost-survey-2017/)

<sup>2</sup> [www.ft.com/content/c82b85ce-df3a-11e7-8f9f-de1c2175f5ce](http://www.ft.com/content/c82b85ce-df3a-11e7-8f9f-de1c2175f5ce)

## Section 2: Organisation information and profile

### Profile of childcare providers

Employers For Childcare received 716 responses from childcare providers in Northern Ireland in May and June 2017. The nature of the providers who responded is set out in the table below. The majority of respondents (58%) were childminders reflecting the make-up of the sector in Northern Ireland.

Nature of provider	Percentage	Department of Health statistics <sup>3</sup>
<b>Childminder</b>	58%	68%
<b>Day nursery</b>	12%	7%
<b>Out of school club</b>	16%	4%
<b>Other</b>	13%	20%
<b>Total</b>	<b>100%</b> <sup>4</sup>	<b>100%</b>

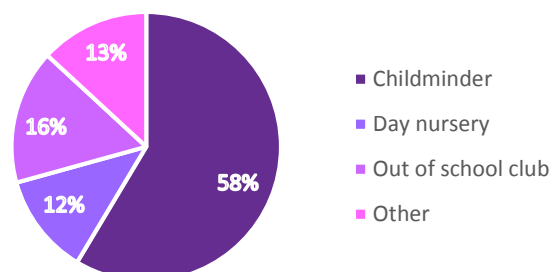


Table 1: Nature of provider

Providers are located across each of the Health and Social Care Trust areas, largely in line with the figures reported in the Department of Health Children's Social Care Statistics for 2016/17.<sup>5</sup>

Health and Social Care Trust	Percentage	Department of Health Statistics
<b>Belfast Health and Social Care Trust</b>	11%	17%
<b>Northern Health and Social Care Trust</b>	31%	28%
<b>South Eastern Health and Social Care Trust</b>	22%	22%
<b>Southern Health and Social Care Trust</b>	18%	17%
<b>Western Health and Social Care Trust</b>	19%	17%
<b>Total</b>	<b>100%</b>	<b>100%</b>

Table 2: Health and Social Care Trust in which providers are located

The majority of respondents are from a private setting, reflecting the high number of childminders within the sample, who are classified as private. When childminders are taken out of the sample, there is a more even breakdown with 45% of other providers classified as from the private sector.

Sector	Number	Percentage
<b>Attached to a school setting</b>	17	2%
<b>Community</b>	104	19%
<b>Private</b>	577	77%
<b>Social economy</b>	16	3%
<b>Total</b>	<b>714</b>	<b>100%</b>

Table 3: Sector breakdown

<sup>3</sup> Department of Health Children's Social Care Statistics for Northern Ireland 2016/17 [www.health-ni.gov.uk/sites/default/files/publications/health/child-social-care-16-17.pdf](http://www.health-ni.gov.uk/sites/default/files/publications/health/child-social-care-16-17.pdf)

<sup>4</sup> 78 Day Nurseries are also registered as Out of School providers with 75 offering afterschool clubs, 46 offering breakfast clubs and 35 offering holiday schemes. These 78 are **included in both categories**. A single registration only is required for a Day Nursery which also provides out of school services.

<sup>5</sup> [www.health-ni.gov.uk/publications/childrens-social-care-statistics-northern-ireland-201617](http://www.health-ni.gov.uk/publications/childrens-social-care-statistics-northern-ireland-201617)

## Occupancy

The average number of children that can be accommodated across all settings is 17. This varies depending on the nature of the provider, from an average of 6 at childminders, 30 at out of school clubs, up to 65 at day nurseries.

Nature of provider	Average number of places	Range
<b>Overall average</b>	17	3 to 160
<b>Childminder</b>	6	3 to 10
<b>Out of school club</b>	30	16 to 78
<b>Day nursery</b>	65	14 to 160 <sup>6</sup>

Table 4: Occupancy by nature of provider

On average, providers had four vacancies that they wished to fill. This ranged from an average of 1.5 vacancies within childminding settings, through to 12 at out of school clubs up to 13 at day nurseries.

Nature of provider	Average number of vacancies
<b>Overall average</b>	4
<b>Childminder</b>	1.5
<b>Out of school club</b>	12
<b>Day nursery</b>	13

Table 5: Average number of vacancies by nature of provider

Health and Social Care Trust	Average number of vacancies
<b>Belfast Health and Social Care Trust</b>	4
<b>Northern Health and Social Care Trust</b>	5
<b>South Eastern Health and Social Care Trust</b>	4
<b>Southern Health and Social Care Trust</b>	2
<b>Western Health and Social Care Trust</b>	3

Table 6: Average number of vacancies by Health and Social Care Trust

28% of providers reported that they had no vacancies. This figure was highest for childminders, 30% of whom reported having no vacancies, and lowest at day nurseries where just 9% reported having no vacancies. 26% of out of school clubs reported having no vacancies. The percentages of providers reporting no vacancies were higher in the Northern (32%), Southern (34%) and Western (35%) Trust areas compared to 21% in the Belfast Trust and 18% in the South Eastern Trust.

For 52% of providers, there was a time in the previous year when demand for places at their facility exceeded their capacity. This figure is highest for day nurseries at 62%, and lowest for out of school clubs at 44%. 51% of childminders experienced this.

Nature of provider	Demand for places exceeded capacity
<b>Overall average</b>	52%
<b>Childminder</b>	51%
<b>Out of school club</b>	44%
<b>Day nursery</b>	62%

Table 7: Demand for places exceeded capacity by nature of provider

<sup>6</sup> Note that some providers operate across a number sites.



Health and Social Care Trust	Demand for places exceeded capacity
Belfast Health and Social Care Trust	60%
Northern Health and Social Care Trust	52%
South Eastern Health and Social Care Trust	46%
Southern Health and Social Care Trust	60%
Western Health and Social Care Trust	47%

Table 8: Demand for places exceeded capacity by Health and Social Care Trust

### Staff

Across all respondents, the average number of staff and volunteers is 4, ranging from one to 36, reflecting 3,060 people; 2,820 employees and 240 volunteers (8%). When we remove childminders from the sample, the average number of staff and volunteers in a setting increases to 11.

### Opening times

Just 4% of providers offer childcare at the weekend. 2% of providers open before 7am, 38% open between 7am and 8am, 41% open between 8am and 9am, and 19% open at or after 9am. 42% of providers close before 6pm, 56% close between 6pm and 7pm, with just 2% open until after 7pm.

Each of the providers who are open before 7am and close after 7pm is a registered childminder suggesting that this might offer a more flexible service for parents in terms of operating hours.

The majority of providers, 84%, are open for most or all of the year (40-52 weeks) while 15% are open during school term time (12-40 weeks), with the highest proportion of these being school age childcare services. This varies according to the nature of the provider.

Nature of provider	Most / all year (40-52 weeks)	Term time (12-40 weeks)	School holidays (Fewer than 12 weeks)
Overall average	84%	15%	1%
Childminder	96%	4%	0%
Out of school club	59%	37%	4%
Day nursery	100%	0%	0%

Table 9: Weeks open across the year

### Accommodating children with a disability or additional needs

Overall, 75% of providers report that they are able to provide childcare for children with a disability or additional needs. This rises to 100% of day nurseries, and 98% of out of school clubs. Fewer childminders, 63%, report that they are able to accommodate children with a disability or additional needs. Some settings mentioned that they find it difficult to meet needs due to their physical environment. In particular, childminders mentioned that their homes may not be equipped to provide such care. To do so would involve making adjustments to their homes, for example, ensuring there is a downstairs toilet and wheelchair access.

This will require further research to explore the reasons behind this perception amongst childminders. Many children with additional needs do not require physical adaptations to the home, for example, those who are on the autistic spectrum, have ADHD, epilepsy or Down's Syndrome. Further on in the research, providers highlighted a lack of training in understanding and accommodating children who are on the autistic spectrum and this may also play a factor.

### Section 3: Financial stability and sustainability

Childcare providers can only deliver childcare where it is financially sustainable for them to do so. Providers were asked whether, in their most recent financial year, they were breaking even, making a loss or making a profit, considering overall income and expenditure. Just under half (47%) reported breaking even, with 12% reporting they had made a loss and 42% reporting a profit. This varies across settings. Out of school clubs are more likely to report making a loss with childminders more likely to report making a profit. These findings would benefit from further research to explore how providers have defined profit, for example, some childminders may have reported a profit before they have paid themselves a salary which means that their staff costs are not reflected in this figure.

Nature of provider	Breaking even	Making a loss	Making a profit
<b>Overall (663)</b>	47%	12%	42%
<b>Childminder (463)</b>	39%	9%	52%
<b>Day nursery (95)</b>	52%	15%	34%
<b>Out of school club (52)</b>	50%	18%	32%

Table 10: Profit by nature of provider

#### Fees

One fifth of providers reported that they had increased their fees in the previous 12 months. The majority, 77%, kept their fees the same while 2% decreased their fees. Childminders were more likely to have kept their fees the same, while day nurseries were those providers most likely to have increased fees.

Nature of provider	Increased	Stayed the same	Decreased
<b>Overall</b>	21%	77%	2%
<b>Childminder</b>	12%	86%	2%
<b>Day nursery</b>	60%	40%	0%
<b>Out of school club</b>	29%	69%	2%

Table 11: Change in fees by nature of provider

Where there was an increase, the top six reasons identified for this were:

Reasons given (all providers)	Percentage
<b>Food, materials and equipment</b>	63%
<b>Staff costs</b>	57%
<b>Business rates and insurance</b>	39%
<b>Pension obligations</b>	33%
<b>Rent / mortgage</b>	28%
<b>Building upkeep</b>	27%

Table 12: Reasons given for an increase in fees

Behind the cost of food, materials and equipment (63%), staff costs are the most mentioned reason, with 57% attributing these as a reason for an increase in fees. In December 2017 it was reported that the annual inflation rate had more than doubled from 1.2% to 3.1% in the previous year, its highest level since March 2012. The Office for National Statistics reported that toys were 6.1% more expensive, food prices 4.4% higher, and heating and electricity up 6.4% compared to figures from the previous year.<sup>7</sup>

<sup>7</sup> [www.ft.com/content/c82b85ce-df3a-11e7-8f9f-de1c2175f5ce](http://www.ft.com/content/c82b85ce-df3a-11e7-8f9f-de1c2175f5ce)

Pension obligations also rate highly, selected by almost one third of respondents. Pension auto enrolment was introduced as a legal requirement on employers from October 2012, initially for the largest employers. The timetable for the smallest employers, with fewer than 30 staff in their PAYE scheme, saw auto enrolment launch on 1 January 2016.

Childminders are typically less likely to employ staff, and are likely to be providing childcare from their own home. When childminders are excluded, staff costs become by far the most popular reason for an increase in fees with 91% listing this as a reason, followed by pension obligations listed by 53%.

### **Impact of National Minimum Wage and National Living Wage**

In their survey responses, a number of providers provided comments referring to the impact of increases in the Minimum Wage and the introduction of the National Living Wage on their setting. From 2016 to 2017 the Living Wage increased from £7.20 per hour to £7.50 per hour, while the Minimum Wage for staff aged between 21 and 24 increased from £6.95 per hour to £7.05 per hour.<sup>8</sup>

*“Increase in minimum wage has had significant impact on business viability.” (Western Health and Social Care Trust, private day nursery)*

*“Living wage increase meant we required more income.” (Northern Health and Social Care Trust, community day nursery)*

*“Due to increase in minimum wage we will have to look at our prices next year, with a view to increasing costs.” (Western Health and Social Care Trust, private day nursery)*

During in-depth interviews, more than half of the providers interviewed (15), principally those employing staff, referred specifically to the impact of increases in the Minimum Wage and the introduction of the National Living Wage on their setting. While there was broad agreement that staff should be adequately remunerated to reflect the work that they are undertaking, providers highlighted the challenge that increasing staff costs presents.

### **Impact now**

One consequence was a narrowing in the wage differential between staff at different grades, for example, between assistants and room leaders. Staff on the Minimum or Living Wages are seeing an increase in their salaries while in some cases those above these levels are not. One provider reflected that this can make recruitment to those roles more difficult as there are additional responsibilities for little additional salary. Another stated that they had had to increase manager salaries as well, with the increase in the National Minimum Wage and Living Wage driving salary increases across the board.

Some providers are reducing staff hours to absorb the additional cost. This results in reducing the overall take home pay of staff and increases pressure on the provider. Other ways to mitigate costs include not replacing permanent staff as they have left and using relief staff instead, reducing overtime, and increasing fees charged to parents. Providers must always meet the ratios of staff to children as required under the Minimum Standards therefore not replacing staff may result in settings reducing their capacity or becoming unsustainable.

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<sup>8</sup> [www.gov.uk/national-minimum-wage-rates](http://www.gov.uk/national-minimum-wage-rates)

Some providers, during in-depth interviews, reported mixed experiences when explaining to parents that they have to increase their fees. In some cases, this has not been well received and several noted that they have lost children as parents have removed them from their facility. One provider noted that they had lost 16 children from seven families as a result of having increased their fees. Other providers noted that this was broadly accepted by parents when they explained the ways they are trying to absorb costs without increasing fees beyond what is necessary.

*“We have no disposable income so had to put up costs, a lot of families were not happy... We are feeling the push, our wages went up but the parents are not getting this increase so this caused problems.” (Northern Health and Social Care Trust, community day nursery)*

*“We did panic about the increase in fees but no parents have ever said anything about it. Could be because this is quite an expensive area for childcare and we charge £18 half day fee and other places charge more.” (South Eastern Health and Social Care Trust, private out of school)*

*“Increasing fees is our main way of managing additional wage costs. This was received ok by parents because there was a detailed explanation given and it wasn't a massive change.” (South Eastern Health and Social Care Trust, private day nursery)*

### **Looking forward**

A key concern for providers is having to increase fees in future which will result in pressure on parents who are struggling with childcare costs, and potentially losing children whose parents cannot use their first choice provider but have to opt to use another provider, or use informal childcare, or to reduce their own hours or leave work.

One provider noted that the changes to the National Minimum Wage and introduction of the Living Wage has increased their wage bill by approximately 10%. They cannot absorb this increase but do not want to increase fees by 10% so are planning 3% instead. They are hoping that, through careful use of resources, sending bills and correspondence electronically, and buying cheaper food and equipment they won't have to lose staff. If occupancy levels drop they will have to consider staffing levels and cuts that can be made.

*“It is great for the staff but has resulted in fees going up significantly- lost a child whose mother took them out because of fees. Also, increases national insurance payments and pensions too.” (Western Health and Social Care Trust, community day nursery)*

### **Case study**

A day nursery highlighted that their setting cannot make a surplus even when at 100% occupancy. The monthly wage bill for staff in their under 2s room is £4,767 which is higher than the monthly income from 6 children under 2 (£4,680). The wage bill covers the hourly rate, employer's national insurance, pension contributions, holiday pay and sickness pay. Putting their fees up is the only way to manage costs and, as a result, they are increasing fees by 4-5% this year following an 8% increase last year.

## Economic outlook

Providers were asked whether they think the economic situation of their organisation would improve, stay the same, or worsen over the next 12 months. One quarter anticipate the economic situation of their organisation will get worse compared to one fifth who feel that the economic situation will improve.

Provider	Weighted average	Significantly improve	Slightly improve	Stay the same	Slightly worsen	Significantly worsen
<b>Overall</b>	-7	3%	18%	55%	19%	6%
<b>Childminder</b>	-12	2%	13%	60%	21%	4%
<b>Day nursery</b>	18	5%	32%	44%	14%	5%
<b>Out of school</b>	13	6%	31%	41%	16%	7%

Table 13: Economic outlook by nature of provider

Day nurseries and out of school clubs are more likely to anticipate an improved economic situation with childminders more likely to anticipate their economic situation will stay the same or worsen. When using a weighted average, day nurseries and out of school clubs have, overall, a more positive approach to their economic outlook. This is interesting in the context of earlier findings that childminders are more likely to report a profit, but considerably less likely to report having increased their fees, and may highlight that childminders are not including their own salaries in their profit reporting. This could be usefully explored in further research.

## Income and expenditure

Looking back, 56% of providers reported an **increase in their overall expenditure** in providing childcare in the previous 12 months, compared to 26% who reported an **increase in overall income**.

Over the last 12 months:	Income	Expenditure
<b>Increased</b>	26%	56%
<b>Stayed the same</b>	53%	41%
<b>Decreased</b>	22%	3%

Table 14: Income and expenditure looking back

Looking forward, 42% of providers anticipate that their expenditure will increase, compared to 23%, almost half of this figure, who anticipate their income will increase. One fifth of providers anticipate that their overall income will decrease.

In the next 12 months:	Income	Expenditure
<b>Increase</b>	23%	42%
<b>Stay the same</b>	57%	54%
<b>Decrease</b>	20%	3%

Table 15: Income and expenditure looking forward

The challenge posed to providers in balancing staff costs, regulatory requirements, provision of quality care, and cost to parents is highlighted in a comment from one provider:

*“Unfortunately with the Minimum standards, Minimum wage increasing (which should be happening for child care workers as the lowest paid for the most important job), pensions we need to ensure occupancy levels remain high with trying to ensure quality care at reasonable prices and this can*

*prove to be a very tricky job as a Day Care Manager.” (Belfast Health and Social Care Trust, Social Economy Day Nursery)*

Future research would be useful to explore what in the Minimum Standards is perceived by providers to result in additional costs to them, beyond staff ratios.

Another key factor for increasing expenditure, highlighted through interviews, is the rising cost of living in terms of food, utility bills, mortgage payments, trips and outings, toys and equipment and car insurance.

### Capacity looking back

Looking back over the past 12 months, providers highlighted that capacity largely remained the same in terms of the number of children that could be accommodated, the number of staff/volunteers, the services provided and the opening hours of the facility.

Capacity in the last 12 months:	Increased	Stayed the same	Decreased
<b>Number of children you can accommodate</b>	19%	73%	7%
<b>Number of staff/volunteers</b>	15%	82%	3%
<b>Services provided</b>	20%	79%	1%
<b>Days the facility is open</b>	4%	94%	2%
<b>Hours per day the facility is open</b>	13%	85%	2%

Table 16: Capacity looking back

There are, however, some trends including that 20% of providers reported having increased their services, with almost one in five (19%) reporting an increase in the number of children who could be accommodated. The table below highlights differences across providers, for example, childminders were much less likely to report an increase in the number of staff or volunteers, while day nurseries were more likely to report an increase in the services provided.

Capacity in the last 12 months:	Increased			Stayed the same			Decreased		
	Child-minder	Day nursery	Out of school	Child-minder	Day nursery	Out of school	Child-minder	Day nursery	Out of school
<b>No. of children accommodated</b>	16%	33%	29%	75%	63%	67%	9%	4%	4%
<b>No. of staff/volunteers</b>	1%	47%	37%	99%	46%	59%	0%	7%	4%
<b>Services provided</b>	17%	36%	22%	83%	63%	76%	0%	1%	2%
<b>Days the facility is open</b>	5%	3%	2%	93%	95%	98%	3%	2%	0%
<b>Hours per day facility is open</b>	14%	10%	8%	83%	90%	88%	3%	0%	4%

Table 17: Capacity looking back by nature of provider

Comments from respondents reveal that, for some, demand from parents has influenced changes over the past 12 months. More than one in ten of those providers who provided a comment to this question reported, without prompting, a greater demand for flexible childcare that offers extended services, earlier starts, after school services, and care during holiday periods. Where parents are

working longer or increased hours, there is a greater demand on childcare providers. However, some providers also reported a decrease in their services being required associated with an increase in parents using informal childcare, particularly family members such as grandparents, to provide care.

This was also reflected in interviews with providers, with some highlighting a trend towards less demand for full-time care. They attribute this to parents being able to work more flexibly and part-time hours, and a greater reliance on grandparents to look after children part-time.

*“Less parents want full-time care now, there is no demand because of flexible work and part-time hours. Years ago parents wanted full-time childminding but it is not like that today.” (Northern Health and Social Care Trust, childminder)*

Funding was also mentioned by community day nurseries and out of school clubs as a key reason for changes in capacity. This can fluctuate with the loss, or renewal, of grants and funding which can make it difficult to plan ahead. This is important in working towards long term sustainability, some are dealing with it through introducing or increasing fees, while others are looking at fundraising or cutting back on existing spend.

*“We had to make one staff member redundant when we lost £6k pc grant funding.” (Western Health and Social Care Trust, community play group)*

*“Additional funding has allowed us to open more days and run more programmes for parents / children.” (Western Health and Social Care Trust, community crèche)*

*“Currently have only one year left with the Bright Start fund. We have 30 children and 25 on a waiting list. If there is no more Bright Start funding we are going to have to scale back- back to three rooms.” (Southern Health and Social Care Trust, community out of school)*

### Capacity looking forward

Looking forward, there is a similar picture as providers anticipate their capacity will largely remain the same. In particular, the opening hours and days of facilities are unlikely to change, despite an acknowledgement that parents are, increasingly, looking for more flexible care.

Capacity in the next 12 months:	Increase	Stay the same	Decrease
Number of children you can accommodate	17%	77%	6%
Number of staff/volunteers	11%	86%	3%
Services provided	11%	87%	2%
Days the facility is open	2%	96%	1%
Hours per day the facility is open	3%	94%	2%

Table 18: Capacity looking forward

The area where more providers anticipate that there may be a change is in the number of children that can be accommodated, with 17% anticipating an increase and 6% a decrease. There is some variation depending on the nature of the childcare provider. In particular, childminders are much less likely to anticipate a change in the number of staff or volunteers.

Capacity in next 12 months:	Increase			Stay the same			Decrease		
	Child-minder	Day nursery	Out of school	Child-minder	Day nursery	Out of school	Child-minder	Day nursery	Out of school
<b>No. of children accommodated</b>	14%	22%	29%	80%	76%	67%	7%	2%	4%
<b>No. of staff/volunteers</b>	1%	34%	25%	98%	60%	67%	1%	5%	8%
<b>Services provided</b>	9%	23%	16%	89%	77%	84%	2%	0%	0%
<b>Days the facility is open</b>	2%	0%	6%	96%	100%	94%	2%	0%	0%
<b>Hours per day facility is open</b>	4%	0%	4%	93%	100%	96%	3%	0%	0%

Table 19: Capacity looking forward by nature of provider

### Long term sustainability

A key theme that emerged from the in-depth interviews in terms of long term sustainability for childcare settings was the issue of funding. This was highlighted by private and community sector settings. Private providers emphasised the difficulty in securing funding which is typically allocated to community settings and, specifically, those in more deprived areas.

Providers in community settings commented on the challenges associated with securing funding which requires regular applications which is time consuming. Several providers shared their view that core funding should come from the Government so that settings do not have to keep reapplying, and that funding should be available to help with staff training costs.

A key concern for childminders, in terms of long term sustainability, is addressing the challenge of **unregistered childminders** which can result in registered childminders losing business or having to reduce their fees in order to remain competitive.

To address this, it is vital that parents are made aware of the support they could be entitled to and the fact that this support is only available where they are using registered childcare providers. Where parents are accessing this financial support, a number of childcare providers stated that these payments are not always paid on to providers and a suggestion was that Tax Credits in particular should be paid directly to the childcare provider.

Working parents may be able to access financial help with their registered childcare costs either through the Childcare Voucher scheme, Tax-Free Childcare, the childcare element of Working Tax Credit, or Universal Credit. The support that is best for each family will depend on factors such as household income, the number of children in the family, childcare costs, and whether a child or family member has a disability. There have been important changes in recent years with the introduction of Tax-Free Childcare, the closure of Childcare Vouchers to new entrants currently scheduled for October 2018, and ongoing roll out of Universal Credit.

It is important that working parents make an informed choice when choosing which form of financial support towards the cost of registered childcare best suits their family's needs and access information and guidance to assist them in making this choice.



## Financial support for parents

Do you accept the following forms of payment?	Yes	No
Childcare Vouchers	90%	10%
Tax-Free Childcare	64%	36%

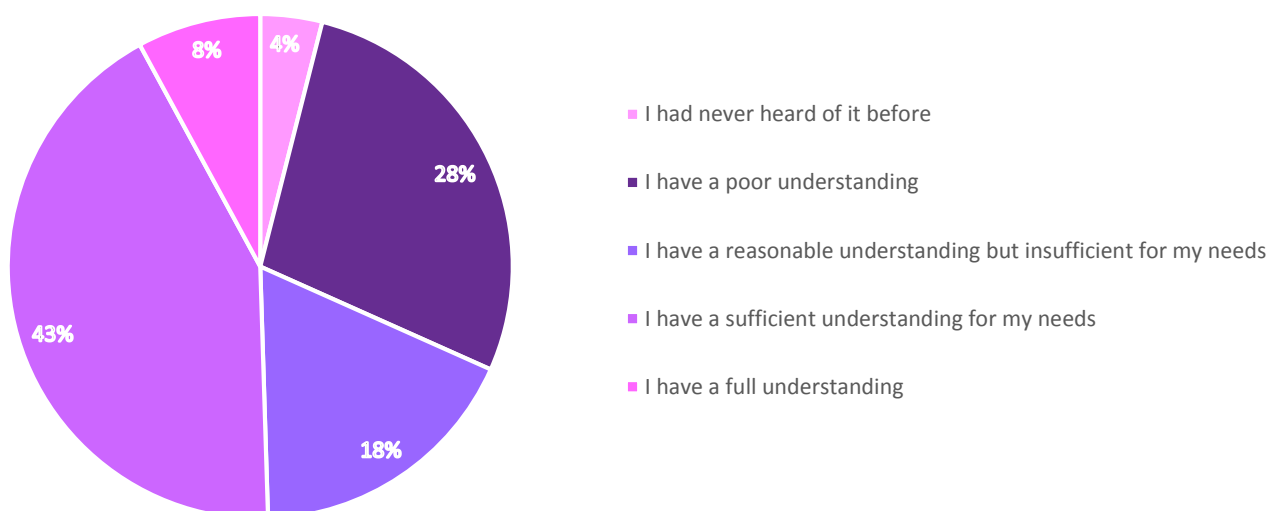
Table 20: Financial support accepted as payment

At the time of this research, 90% of providers who responded to the survey reported accepting Childcare Vouchers as a form of payment, compared to 64% of respondents who were registered to accept Tax-Free Childcare. Of those providers who are not registered to accept Childcare Vouchers, the majority are childminders where families may be using another form of financial support, for example, a number of the childminders who are not registered to accept Childcare Vouchers are registered to accept Tax-Free Childcare.

Providers' awareness of Tax-Free Childcare	Percentage
I had never heard of it before	4%
I have a poor understanding	28%
I have a reasonable understanding but insufficient for my needs	18%
I have a sufficient understanding for my needs	43%
I have a full understanding	8%

Table 21: Providers' awareness of Tax-Free Childcare

Approximately half of respondents to the survey have an understanding of Tax-Free Childcare that is at least sufficient for their needs (8% have a full understanding). Half of respondents have an understanding that is not sufficient for their needs, is poor, or non-existent with them not having heard of the scheme before.



## Section 4: Training

88% of providers reported that they or their staff had accessed training in the previous 12 months. Amongst those who had not accessed training, the key reasons given were:

Why have you or your staff not accessed training?	Percentage
None required	63%
Location	19%
Time of training	18%
Not enough time	16%
Cost	15%
Training that was required was not available	10%
Did not know where to access training	6%

Table 22: Reasons given for not accessing training

Providers identified a number of areas, from a list of options, where they felt they or their staff could benefit from training.

What training could you or your staff benefit from?	Number	Percentage <sup>9</sup>
Behaviour management	282	44%
Autism	271	42%
Special needs	260	40%
Play based learning	207	32%
Outdoor play	187	29%
Paediatric first aid	187	29%
Risk assessment	166	26%
Child protection	157	24%
Children for whom English is not a first language	155	24%
Financial management	133	21%

Table 23: Training that could be of benefit

There are some interesting variations across the different types of childcare provider, for example, across most of the options day nurseries, and to a lesser extent out of school clubs, are considerably more likely to identify areas where their staff could benefit from training.

What training could you or your staff benefit from?	Childminder	Day nursery	Out of school
Behaviour management	38%	76%	54%
Autism	41%	61%	39%
Special needs	36%	67%	35%
Play based learning	27%	60%	51%
Outdoor play	20%	55%	60%
Paediatric first aid	23%	49%	52%
Risk assessment	19%	39%	48%
Child protection	21%	46%	33%
Children for whom English is not a first language	21%	43%	29%
Financial management	24%	21%	26%

Table 24: Training that could be of benefit by nature of provider

Other areas of training specifically mentioned include ICT training, Sign language, Manual handling, Mindfulness for children, Health and safety, Anaphylaxis, Epilepsy, the Eager and Able to Learn

<sup>9</sup> 649 providers answered this question

Programme, Arts and crafts and Safeguarding. Caring for children with additional needs and Autism were key areas that providers felt that they required more training in. Many indicated that they would like to provide care for these children but a lack of training can act as a barrier. One provider mentioned that when there is training available on special needs and Autism there are limited spaces that fill up very quickly.

*“More people are aware of Autism and we have to provide for a variety of needs, but we don’t have the training. We recognise different traits in children but can’t do anything because we don’t have the training.” (Northern Health and Social Care Trust, private day nursery)*

### How existing training could be improved

A key recommendation was that training is made available in the evenings and at weekends to better accommodate work commitments, however this needs to be balanced with sufficient numbers to make such training sustainable. For example, a childminder based in Enniskillen noted that she may have to travel a number of miles to avail of training, and her frustration is when it is cancelled due to a lack of numbers.

Another suggestion was for training courses to be shortened as some can be quite lengthy. Some providers called for more local training, particularly those in more rural areas, where it was highlighted that there can be a lack of provision, with long distances to travel to access training.

*“Training is poorly supported in the western area especially Fermanagh. Times are unsuitable for us working to 6 and expected to be ready for 7 with over an hour’s drive to get somewhere!” (Western Health and Social Care Trust, childminder)*

Providing onsite or online training was proposed for providers to access training flexibly or from their own homes. Online training was viewed as beneficial by childminders who work long hours and have their own families at home to look after. Proposals included that training courses could be facilitated both online and using a self-led approach, making them easier to schedule and facilitate.

*“There is a lot of support already out there, NICMA, EFC etc. It is just fitting them into your schedule is hard as the training is on at inconvenient times. Would have to stop work to attend-which can't be done as there are children to care for until a certain time.” (Belfast Health and Social Care Trust, childminder)*

A significant amount of free training is provided for staff from all providers through the Early Years Development Fund administered by the Childcare Partnerships / Health and Social Care Board however providers highlighted that the cost of accessing other training can pose a challenge, particularly where providers have to buy in training to ensure that all staff can access it.

#### Case study

A community day nursery highlighted an example of where they had to pay £435 for an hour and a half of training for 16 members of staff. They found this cost difficult to meet, and suggested that providers should be able to claim funding for training based on the number of staff at a setting.

## Section 5: Main challenges

Childcare providers were asked to identify the five main challenges to them in providing their service. The top five challenges, identified from a range of options, were:

Top five challenges	Percentage
Securing sufficient income to cover expenditure	47%
Financial sustainability	46%
Competition from other providers	39%
Maintaining occupancy of places	39%
Inspections	38%

Table 25: Main challenges identified by providers

Financial assistance from Government was called for to assist parents with the cost of childcare, and allow providers to sustainably increase staff wages, and access the training and resources they need to ensure the highest standard of care. Some providers suggested a flat rate across childcare providers could provide a fairer system for both providers and parents. Alongside this was a call for Tax Credits to be paid directly to providers to stop them from having to chase late payments or, in some cases, having to write off fees. Providers recognised, however, that many parents require financial support to assist them with the cost of childcare and are keen to ensure that parents know about and are accessing this.

During in-depth interviews, providers from across each of the sectors pointed to what they perceived as an increasing amount of paperwork, in some cases due to inspections, in some due to funding applications. For some, this causes stress while another suggests it does not allow for enough focus on play work and spending time with the children. It was described as excessive and, according to one provider, takes the enjoyment out of childcare.

There was a perceived increase in the number of childcare facilities, creating competition for providers, especially an increase in schools providing after school facilities. The number of unregistered childminders was mentioned by childminders as a key challenge to improving sustainability for registered childminders. A childminder shared having to decrease their fees to compete with unregistered childminders in their local area.

*“Have had to decrease 80p an hour - down to unregistered childminders offering unsustainable prices.” (South Eastern Trust, Childminder)*

Childminders noted how, at inspections, they can feel that they are assessed as a nursery setting rather than reflecting that provision is in their home environment. Ratios were mentioned as being too strict for childminders, and that these could be made more flexible. However, it is important to note that all ratios are stipulated in Regulations and Guidance under the Children (Northern Ireland) Order 1995 and are not at the discretion of any individual inspector or Trust.

A decrease in demand for full-time care was also mentioned, with more parents working part-time and not requiring full-time childcare. Some providers explained that this was a challenge, because there is a need for flexible, high quality care which is difficult to maintain alongside a low rate of fees. Also during interviews, several providers highlighted a lack of support groups in rural areas which can result in childminders in particular feeling isolated. Finally, lack of recognition from parents was highlighted as a challenge with some providers indicating parents do not understand the work and costs involved, making them feel undervalued.

## Section 6: What is working well

Childcare providers were asked to identify the five main things that are working well for their organisation. The top five things, identified from a range of options, were:

What is working well for you	Percentage
Liaison with parents	74%
Inspections	45%
Maintaining occupancy of places	37%
Business management skills	28%
Upkeep of buildings / facilities	26%

Table 26: What is working well for providers

A key area mentioned was the financial support available to assist parents with the cost of childcare. This is perceived as working well to help parents to remain in work and afford the cost of childcare. Bright Start School Age Childcare Funding and Pre-School Education Programme funding were also mentioned as providing important support.

The standard of care was highlighted as a real positive within the sector in Northern Ireland, with providers offering a variety of excellent facilities catering to the needs both of parents and their children. The minimum standards have helped ensure staff are fully qualified and knowledgeable in the safety of children, child protection and what is expected of them at inspections.

Membership and support organisations were highlighted as working well for the childcare sector. Providers mentioned organisations including the Early Years organisation, NICMA, Playboard NI, Employers For Childcare, and NIDCO in providing advice, support and resources. Additionally, the Family Support NI website was mentioned as an important resource. The Childcare Partnerships and Health and Social Care Trusts were also mentioned by some providers as good sources of support, information and advice. For others, creating their own more informal groups, such as through social media, has given them access to a network that allows them, childminders in particular, to help, support and advise each other on any concerns they may have.

*“With the help of NICMA they have been like my bible in explaining the minimum standards, I go by them and they keep us all right. If it wasn't for them I would be lost. They make us different as registered childminders because parents realise that we have had everything checked and are trained properly. The process can be lengthy though and involves a lot more paperwork.” (Southern Health and Social Care Trust, childminder)*

During in-depth interviews with 28 childcare providers, half of them – from across each type of provider – suggested that the regulatory environment was working well for them. Some commented that being registered, regulated and inspected every year put them in a more secure position, helping to profile the dedication and commitment of the staff, to prioritise updating training, attending courses and gaining relevant qualifications.

Also during interviews, a recurring theme was, for many providers, the relationship with parents was a particularly rewarding aspect of their work. They reported that building good relationships with parents is vital, and that they feel valued and recognised by parents who are able to go to work feeling reassured and happy that their children are being cared for in a safe environment. This echoes the distress communicated by two providers in particular, both day nurseries, when discussing the prospect of having to raise their fees. They are concerned this will not be feasible for parents and could impact negatively on their relationship.

## Section 7: Regulatory environment

In-depth interviews with 28 providers from across the sector in Northern Ireland provided an opportunity to discuss their perspectives on registration and regulation of the sector in Northern Ireland. Half of those interviewed reacted positively to regulation and the introduction of the Minimum Standards<sup>10</sup>, with others reporting a more mixed or negative experience.

### Framework for quality care

Amongst those who had a more positive perspective, they appreciated having the standards as a 'guide' they could refer to, in providing a framework supporting them to go 'above and beyond' the minimum that is required, and in promoting high quality care, providing reassurance for parents.

*"It is a very good thing, you know the dos and don'ts with the Minimum Standards. If you aren't sure about something you can lift the standards." (Southern Health and Social Care Trust, community out of school club)*

*"Totally agree with it- great to have it in place. We were already meeting these standards, so meant we are aiming for a higher standard not a minimum standard. About going above and beyond." (Belfast Health and Social Care Trust, private day nursery)*

### Confusion and uncertainty in application

However, other providers, from across each type of provider, experienced the registration, regulation and inspection processes more negatively, expressing confusion about the introduction of the Minimum Standards, the guidance associated with them, and uncertainty about how to apply them. This was not isolated to any particular type of provider, with those from across the range of settings having both positive and negative experiences.

*"Registration and setup was horrific, went into this process naïve and was shocked. Setting up...was very problematic, no room for common sense. Not considering the school setting and how that was managed." (Northern Health and Social Care Trust, out of school club in a school setting)*

*"The introduction of the minimum standards made me feel physically sick because I didn't understand them and they were not fully explained to me." (Northern Health and Social Care Trust, childminder)*

### Inconsistent approach and interpretation

A key theme that emerged is that, even where respondents welcomed the introduction of the Minimum Standards in promoting quality care, there is a perception amongst some of an inconsistent approach used when interpreting them at inspection.

*"The Minimum Standards are interpreted differently by different social workers and they don't read well for childminders." (Western Health and Social Care Trust, childminder)*

*"The idea behind it is good and helpful but the delivery is sometimes inconsistent and frustrating." (Belfast Health and Social Care Trust, Community Day nursery)*

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<sup>10</sup> [www.health-ni.gov.uk/sites/default/files/publications/dhssps/early-years-standards-full-version.pdf](http://www.health-ni.gov.uk/sites/default/files/publications/dhssps/early-years-standards-full-version.pdf)

Some providers observed that social work inspectors were not using the same guidance notes across all Trust areas. It was suggested that standardising these would make for a fairer, more consistent approach, and stop individual social workers using their personal opinions to make changes.

*“If all social workers had the same information and had the same requirements it would make it fair across the board as opposed to giving their personal opinions.” (South Eastern Health and Social Care Trust, childminder)*

### Focus on paperwork

Some providers feel that, with the introduction of the Minimum Standards, there has been a shift in focus towards meeting requirements by ‘ticking the box’ at inspections, with little time spent on constructive improvement or observing the children in the setting, and social work inspectors being less available to offer support and guidance on a more regular basis.

*“There is no focus on actual childcare, more of a tick list and varies across different social workers. Looks for faults and no focus on improvement.” (Southern Health and Social Care Trust, community day nursery)*

Another provider (private day nursery) however viewed inspections as becoming fairer and better due to social work inspectors following a list which sets out clearly what they expect from each setting.

Over one third of the providers interviewed, principally day nurseries and childminders, perceived that a large amount of paperwork is required for inspections and they highlighted the impact that this can have on them. One mentioned the amount of risk assessments that they are required to do, while another referred specifically to the submission for the self-evaluation which has to be submitted prior to the inspection. The provider reported putting a lot of effort into this but not having the detail reviewed, which was frustrating for them.

*“Involves a lot of paperwork, I am hopeless at dealing with this and it makes me nervous about the upcoming inspection. It is hanging over your head.” (Western Health and Social Care Trust, childminder)*

It was also reported that paperwork can impact on parents. A community day nursery in the Southern Health and Social Care Trust reported that parents now have to complete official forms where there are incidents that, previously, the nursery could have dealt with. They gave the example of a child being bitten by another child, various forms are required for parents to complete, they perceive that this can be intimidating and can get parents’ backs up.

On the other hand, one provider (childminder, Belfast Health and Social Care Trust) expressed the view that the level of paperwork required is a source of reassurance for parents.

### Tailored approach across settings

Two providers, one from a childminding setting and the other from an out of school club, shared their view that the same level of inspection may not be appropriate across all settings, and that their experience is of being expected to meet standards which may be more appropriate for other settings and not applicable to them.

*“Expected almost to run a pre-school playgroup. This isn't what childminders are trained for.”  
(Belfast Health and Social Care Trust, childminder)*

*“Don't always know about out of schools, there are fewer of them and social workers have less experience of them and can say things that don't apply to us.” (Southern Trust, community out of school club)*

### **Flexibility in approach**

A childminder who has been working with children for over 25 years shared her view that the rules and regulations are becoming stricter. An example was given of how she is no longer allowed to take any pictures of the children in her care, she used to keep an album of the children that the parents loved, but can no longer do this. Her lack of understanding of the policies has made her feel useless.

It was also suggested that updates and changes to the guidance accompanying the Minimum Standards should be minimised, and that where there are changes there is clear and proactive communication. Otherwise, providers are having to constantly keep on top of these and, in some cases, are unaware that there have been changes, finding out only through another provider.

Several providers suggested that improvements could be made by introducing greater flexibility into the application of the Minimum Standards, particularly with regards to ratios and in allowing children to be cared for in mixed age groups. It is important to note, however, that ratios are set in legislation and cannot be changed without a change in the law.

*“Allow a wee bit of leeway, combining rooms and numbers, for the benefit of the children and not just to cut costs.” (Northern Health and Social Care Trust, private day nursery)*

One provider highlighted that the requirement to separate children of different age groups can mean they do not get to experience the benefits of playing and learning with children of different ages. She explained that this can be particularly difficult to manage where siblings are separated and fails to recognise that mixing the age groups of children can have benefits, including improved leadership skills for older children and an easier transition for younger children to school level.

It was reported that the time it can take to ensure staff are appropriately vetted and cleared can be lengthy, impacting on the ability of providers to meet ratios or even to retain staff who, because they cannot work until they have received clearance, may look elsewhere and outside of the sector.

*“Their processes are failing us- need to meet the staff ratio but can't clear staff on time.” (South Eastern Health and Social Care Trust, Day Nursery)*

A similar perspective was shared by one childminder who pointed to the length of time the registration process can take and suggested that this could, indirectly, encourage a growth in the number of unregistered childminders if people were not prepared to wait.

### **Scheduling of inspections**

The scheduling of inspections was highlighted as an issue of concern. In particular, being given a window of one month within which an inspection may be made makes it difficult to plan and manage staff meetings or holidays, cope with illness, and maintain ratios. While providers recognise the rationale behind unplanned inspections, they can make planning and preparation difficult.



*“Let us know the date they are coming out, as coming out on a random day disrupts me and takes me out of my work. They never sit down with the children and ask them what they like or what they think.”(South Eastern Health and Social Care Trust, private out of school)*

It was recommended that greater consideration is given to the time of year when inspections are scheduled. September is not a good month to have an inspection as it is the start of term, whereas after Christmas the children are more settled and in a routine.

At the same time, within any regulatory scheme for registered services, there are typically unannounced inspections and inspections carried out across the calendar year in order to ensure inspections are completed in line with statutory duties.

*“No problems at all, inspections can be any day of the week and this is no issue.” (South Eastern Health and Social Care Trust, childminder)*

One provider, a private day nursery in the Belfast Health and Social Care Trust, advocated strongly for unannounced inspections:

*“They shouldn't tell you the month they are coming – the inspector should come at any time. The nursery should be run well regardless of time or date. Inspections should be about reality and how it works every day.” (Belfast Health and Social Care Trust, private day nursery)*

### **Experiences with social work inspectors**

A number of providers spoke positively of their experience with social work inspectors and had found them to be informative and happy to help and providing good feedback after inspections.

*“Good relationship with inspecting Social Worker- always helpful if needed, and with them from the beginning. Better now that all Social workers are following the same procedures.” (Belfast Health and Social Care Trust, private day nursery)*

*“They all do their job very well and have always had good experiences. All inspections carried out very professionally and the social worker was lovely, there are none who are out to get us- they work with us.” (Western Health and Social Care Trust, childminder)*

Others highlighted that they have experienced a regular turnover in social work inspectors prevents them from building up a rapport and a good relationship with them. It can also make them feel less confident about contacting them to ask for advice.

*“Overall very positive, but there is a different social worker each time.” (Belfast Health and Social Care Trust, childminder)*

*“We currently have a brilliant social worker who is very responsive to queries. We have had five social workers since we started two years ago due to moving and retiring etc.” (South Eastern Health and Social Care Trust, community day nursery)*

*“There is always a different social worker at the inspection, this makes it very difficult to build rapport. It wastes time as I have to explain everything again for at least an hour to a new social worker at the next inspection. I feel like I can't ring the social worker and ask for advice about a problem because they are all different.” (Northern Health and Social Care Trust, childminder)*

This can generate inconsistency with some providers having experienced differing interpretations of standards among different social work inspectors depending on their opinions. One provider (private day nursery) shared her perception that the result of an inspection can depend on a social work inspector's personality. Varying experiences were reported in the in-depth interviews, with a small number of providers – from day nursery and childminding settings - sharing their experience that they get different messages from different social work inspectors.

Interviews offered an opportunity to discuss the providers' recommendations and what they do when they have these experiences. Several providers from community and private day nurseries suggested recruiting inspectors who have worked in a childcare environment, or to provide them with this experience, so they can have a better understanding of providing childcare.

*"I completely agree with why it is done, but some might need more experience on the area they are inspecting - experience in a childcare setting - as some have never been in an Early Years or childcare setting before." (South Eastern Health and Social Care Trust, private day nursery)*

One provider, in the Northern Trust, noted that they had once reported a Social Work Inspector due to their attitude at the inspection however, overall, providers across the board noted that they are keen to have good relationships with their social work inspectors. They would like to be able to speak to them for information, guidance and advice, and to have consistency so that the relationship can be built and developed over time. This is already the experience of some providers, and a key recommendation from others. Where specific issues arise, such as those highlighted above, it may be helpful for childcare providers to contact the relevant Health and Social Care Trust to discuss this and a resolution.

## Section 8: Attitudes towards working in the sector

During the interviews with childcare providers, the majority – 22 out of 28 - stated that they would definitely recommend a career in childcare to others, two suggested they might but were uncertain, while four definitely wouldn't. The most rewarding part was perceived as seeing children develop into their own unique personalities, having fun with the children and watching them build friendships. Being a childcare provider was compared to being a teacher delivering valuable skills and making it very rewarding. Getting good feedback from parents was also viewed as a positive experience.

*"It has an attractive image as you are respected by the parents and the children and get recognition." (Southern Trust, Out of School Community)*

*"How lovely is it to have children in your home and know that they will remember happy times with a childminder." (Northern Trust, Childminder)*

Childminders also referred to the flexibility of their chosen career and how it allows them to manage their work and home lives.

*"It provides a balanced work life, because I am at home with my kids and am spending time at home." (Southern Trust, Childminder)*

Some providers suggested that you must be very passionate about working with children as the sector does not pay high wages. Several respondents commented on how working in a childcare setting the rate of pay can be lower than working in retail, and elements of the job can be very challenging. A provider in a day nursery manager role mentioned how it is a very rewarding job but thinks if the managerial side was reduced a little with less paperwork then more time could be spent with the children and it would be more enjoyable. Specific areas where high levels of paperwork were mentioned by different providers include:

- Applications for funding, then quarterly and annual reports to funders
- Risk assessments
- Self-evaluations and documentation required before inspections.

There were several recommendations made including:

- Moving more processes online allowing forms to be started and completed over time
- Providers keeping on top of paperwork across the year saving time when inspections are due
- Support and guidance to be provided on filling out forms relating to funding and inspections.

Where respondents were less likely to recommend their career to others, they commented on how challenging the role is, and how people sometimes underestimate this. The challenging aspects of the role included trying to meet the needs of parents and staff, the administrative duties, inspections, late payments from parents and the lack of financial support.

*"No, as it is not about caring anymore it is all about admin. All admin with a little bit of childcare thrown in." (Southern Trust, Community Day Nursery)*

*"No, as it is a lot of work for sometimes little thanks at the end of the day." (Belfast Trust, Childminder)*

A childminder explained that inspections can involve their house being disrupted and that it can be an intrusive experience. Another shared how they had to spend £800 on adjusting their house including an extension to ensure there was a downstairs toilet and a spare room for napping. These are things that can sometimes go unnoticed. A number of providers shared their perception that people do not realise how much hard work is involved, and that it requires a lot of mental, physical and emotional energy.

### **Job attractiveness**

Although most providers interviewed would recommend a career in childcare to other people, our findings also revealed that just one quarter of the providers interviewed view it as having an 'attractive' image as a career path. Some of the reasons for this included how young people are sometimes encouraged to take up a career in childcare with the perception that it is an easy job, but do not realise how much practical work is involved. It was mentioned that some come straight from college with minimal practical experience, despite their qualifications.

*"A lot of people go into childcare jobs with a level of education and no practical experience, there needs to be a balance of business and childcare." (South Eastern Trust, private out of school club)*

Childcare was referred to as an undervalued and unrecognised profession, with parents sometimes being unappreciative of the hard work that is involved and concentrating too much on any small faults. This was understood as reflected in the low rate of pay that providers receive.

*"It doesn't get the recognition it deserves and we are underpaid. Have been called a babysitter before." (Northern Trust, private day nursery)*

*"A lot of people view it as 'just a childminder', we don't get the title or recognition that we deserve. It needs to be viewed more professionally." (Southern Trust, childminder)*

Some mentioned how the image has improved compared to 10 years ago, as childminders now have more rights, a childminder mentioned how they are no longer viewed as "glorified babysitters". As an increasing number of parents are becoming interested and involved in the level of care provided by childminders, they are more aware of what activities they are teaching their children and how important these are for child development.

*"It is an improving image but some people still think of it as a 'granny' than more of a profession." (Belfast Trust, Childminder)*

There was some variation across different providers in terms of their perceptions towards a career in childcare. For example, childminders tended to highlight the importance of being able to work from their own home and emphasised the positive experiences in building relationships with children and their parents. Several childminders, however, suggested that for younger people coming into childcare it can be more attractive to work in a day nursery setting where there are other staff and that the increasing number of young graduates working within that sector can create a more positive view. Within day nursery settings, managers tended to highlight that expectations can be difficult to meet in that the sector can be more challenging than anticipated, the work can be physically and mentally tough, and the pay within the sector is low.

### **Career progression**

When asked if they thought that there were opportunities for career progression we received mixed responses. Childminders tended to share the view that there are no opportunities to progress as an

individual childminder. One respondent explained that there is the option to study child development further to support her career, but that they have no time to go back and study at college. Another childminder expressed that you must be very self-motivated to go and study a higher course, and some training she had previously accessed through one membership body had been withdrawn.

*“Makes no sense to take time out of work to go to college, when I can earn more at home being a childminder than working in a different setting.” (Belfast Trust, Childminder)*

Day nurseries and after schools had a more positive outlook on career progression. One respondent expressed that they had worked their way up the ladder, and are now qualified to deliver training. Another revealed that they had started off as a supervisor and are now a deputy manager. However, funding was mentioned as a barrier to progression as it is not available for training for all ages. A manager also shared the dilemma with training staff, as they want to but realise that this could result in losing the staff who are trained. Another expressed how moving up to a manager position is something to be very proud of, as you must have the right mind set and be determined.

*“Yes, started off with no experience and trained up and worked my way up to a supervisor then deputy manager.” (South Eastern Trust, Day Nursery, Private)*

## Section 9: Conclusions

The purpose of this research was to highlight the experiences of childcare providers in Northern Ireland who are vital to providing care, early education and development for children as well as supporting parents to get into and stay in work. In doing so, we have identified important implications for the sector and of relevance for the forthcoming Childcare Strategy.

### Cost of delivering childcare

Childcare providers can only deliver childcare where it is financially sustainable for them to do so. This research found that 59% of providers reported that they were either just breaking even (47%) or making a loss (12%) in the last financial year. Providers are experiencing increases in the cost of delivering childcare including increased staff costs and a rising cost of living. Even so, the majority - 77% - had kept their fees the same, despite rising costs. Concerned about increasing fees and the potential impact on parents, many have tried to absorb the costs and minimise the impact. This is not sustainable, however, and providers are calling for strategic investment and support for settings and for parents. This is vital to ensure parents can access affordable childcare, and staff receive a rate of pay that recognises the value of their work and attracts high quality staff into the profession.

### Support for providers

Many providers were positive regarding the support they receive including from statutory bodies, membership organisations and advice giving charities. However, it was highlighted that communication can be inconsistent or lacking at times and some providers have resorted to more informal networks for information sharing and support.

The creation of a union was advocated by a number of childminders as a key way of ensuring they can voice their concerns and contribute towards any changes in policy or regulations.

Childcare providers also need support to accommodate the changing patterns that, increasingly, parents are now working including weekend and evening work, shift work, on-call and part time or flexible hours. Many parents as a result are requiring additional flexibility from their providers which can introduce additional pressures, or impact on overall occupancy.

### Support for parents

Financial assistance from Government was called for to assist parents with the cost of childcare, and allow providers to sustainably increase staff wages, and access the training and resources they need to ensure the highest standard of care. It was highlighted that more information needs to be made available on the Government's new Tax-Free Childcare scheme, as providers felt that parents were not fully aware of how this scheme works and that it may apply to them. More broadly, providers advocated the importance of ensuring that parents know what support they are entitled to as this is key in helping them to pay for childcare. It was also suggested that Tax Credit payments should be made directly to providers, not to the parents, to ensure that providers receive payments on time.

### Responding to unregistered childminders

Childcare providers across the board and all types of provider, but particularly childminders, urged that more action needs to be taken to address the issue of unregistered childminders with stricter rules imposed and awareness raised with parents of the risks of using unregistered childminders, as well as the inability to access financial support.

## Regulation and inspections

Childcare providers are still getting to grips with the introduction of the Minimum Standards in 2012, and a rigorous regulatory and inspection environment. Many had a positive attitude and welcomed the professionalisation and regulation of the sector, however, important issues were raised:

- Ensuring consistency with how the standards are communicated and interpreted
- Supporting providers to be confident and knowledgeable on the standards, the regulation process, and where to find information
- Changes in implementation guidance must be proactively communicated across providers
- Tailoring processes to reflect different settings
- Reducing the focus on paperwork as it is perceived that this can pose a barrier, in particular to becoming a registered childminder.

While there were suggestions relating to introducing elements of flexibility into the standards, for example, in terms of staff to child ratios, these would need to be taken forward as legislative changes and are not necessarily within the scope of a Childcare Strategy.

## Training and career progression

Access to training and an approach that recognises and values the role of childcare are both vital in promoting it as a career of choice, attracting high quality individuals and ensuring that they have the necessary skills and qualifications. A more strategic approach should be adopted to ensure that providers can access training wherever they live, for example, providers from rural areas highlighted particular difficulties in accessing training. As a result, it is recommended that the provision of online training which is cost effective, and can be accessed at a time that suits the needs of providers, should be put in place.

## What next?

The childcare sector in Northern Ireland is diverse, with a variety of perspectives and experiences. This report contributes perspectives on how the sector can be better supported, and should be reviewed alongside similar research supported by the Northern Ireland Childcare Partnerships and carried out by [NICMA](#), [Early Years](#), [Playboard NI](#) and [Altram](#) reporting important findings and recommendations for Government. Investment in the childcare infrastructure in Northern Ireland is essential to ensure a system that enables parents to access and stay in paid work, education or training, and recognises the value of childcare and those employed within the sector.

The economy will be stronger if we have a highly skilled, dedicated workforce which is supported by a strong and robust childcare infrastructure. Without access to childcare in many cases parents cannot work, skilled workers leave the workforce or work in lower paid jobs, or access to training and education is limited. An effective childcare infrastructure positions childcare as an enabler to work – generating enhanced labour productivity through allowing parents not just to enter the workplace, but to access employment that pays, that is appropriate to their level of skills and experience, and that impacts positively on their mental health and well-being. Childcare is also a key tool in enabling parents to progress in the workplace and to access training and development opportunities.

In listening to the voices of childcare providers, the Government has an opportunity to develop and promote a childcare system that genuinely meets the needs of children, families, childcare workers and providers and benefits society.

## Appendix 1: Methodology

Ahead of launching the survey, Employers For Childcare engaged with key stakeholders to gain a better understanding of the issues to explore. Stakeholders included the Childcare Partnerships, Playboard NI, Early Years: the organisation for young children, the Northern Ireland Childminding Association (NICMA) and Northern Ireland Day Care Owners (NIDCO). We are grateful to those who engaged with us for their constructive feedback.

The script for the guided in-depth interviews incorporated questions suggested by the Low Pay Commission in their Consultation Letter 2017<sup>11</sup>.

### Survey

This research was launched on 23 May 2017 with a paper survey circulated to childcare providers across Northern Ireland and an online survey available. The survey closed on 30 June 2017.

Facility type	Number	Percentage	Department of Health statistics	Notes
Childminder	463	58%	68%	78 Day Nurseries are registered as out of school providers. 75 offer afterschool clubs, 46 breakfast clubs and 35 holiday schemes. They are included in both categories as a single registration is required.
Day nursery	95	12%	7%	
Out of school club	130	16%	4%	
Other	106	13%	20%	
<b>Total</b>	<b>716</b>	<b>100%</b>	<b>100%</b>	

Table 27: Nature of survey responses

We received **716 responses**, 15% of the overall population of day care providers in Northern Ireland, giving a robust statistical margin of error of 2.8% at a 90% confidence level. 78 Day Nurseries are also registered as out of school providers and, in line with the Department of Health's calculations in the Children's Social Care Statistics for Northern Ireland 2016/17, are **included in both categories** for the purposes of calculating some percentages.<sup>12</sup>

### Interviews

We conducted 28 in-depth interviews with childcare providers across different Trust areas on their experiences.

Health and Social Care Trust	Childminder	Day Nursery	Out of school club	Pre-school
Belfast	2	3	1	
Northern	2	3	1	1
South Eastern	2	2	1	1
Southern	2	1	1	
Western	2	2	1	
<b>Total</b>	<b>10</b>	<b>11</b>	<b>5</b>	<b>2</b>

Table 28: Nature of in-depth interview participants

<sup>11</sup> [www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/610184/Low\\_Pay\\_Commission\\_consultation\\_letter\\_2017.pdf](http://www.gov.uk/government/uploads/system/uploads/attachment_data/file/610184/Low_Pay_Commission_consultation_letter_2017.pdf)

<sup>12</sup> Department of Health Children's Social Care Statistics for Northern Ireland 2016/17 [www.health-ni.gov.uk/sites/default/files/publications/health/child-social-care-16-17.pdf](http://www.health-ni.gov.uk/sites/default/files/publications/health/child-social-care-16-17.pdf)



Providers represented private, community and voluntary and social economy run facilities. They were selected randomly from respondents to the survey on the basis of quotas applied to ensure each type of provider was interviewed. Within day nursery and out of school club settings a mixture of private and community settings were identified.

It is important to note, however, that depth interviews reflected a smaller sample size than the overall survey and, as such, the comments may not reflect the views of all providers.

# Employers For Childcare

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**Employers For Childcare**

Blaris Industrial Estate  
11 Altona Road  
Lisburn  
BT27 5QB

028 9267 8200  
Freephone 0800 028 3008  
[hello@employersforchildcare.org](mailto:hello@employersforchildcare.org)