

Childcare Sufficiency Assessment Form

Name of Local Authority: Merthyr Tydfil County Borough Council



Cyngor Bwrdeistref Sirol
MERTHYR TUDFUL
MERTHYR TYDFIL
County Borough Council

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Introduction

This template provides an overview of Early Years and Childcare provision in the Merthyr Tydfil County Borough Council area establishing a baseline of provision, the Childcare Sufficiency Assessment (CSA) that will enable:

- The measurement of the nature and extent of the need for, and supply of, childcare in Merthyr Tydfil; and
- The identification of gaps in the market and plans on how the Early Years and Childcare market in Merthyr Tydfil will be supported to address them

This is done to ensure that the Childcare Sufficiency Assessment demonstrate that the Local Authority has taken into account and assessed the matters set out in The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016 and the Statutory Guidance to identify an appropriate plan to address and gaps and issues the CSA highlights over the next 5 years to 2021/22.

Principal Statement

This section should be used to articulate the Local Authority's acknowledgment of the value and importance of childcare.

Merthyr Tydfil County Borough Council recognises the value and importance that quality Early Years and childcare provision plays in the lives of children and families across the County Borough. The Local Authority supports their commitment to delivering the Childcare Act 2006 requirements through the provision of an Early Years Service and Family Information Service that are committed to co-ordinating all aspects of the childcare market in accordance with the findings of the Childcare Sufficiency Assessment and associated Action Plan.

Access to childcare that is quality, affordable and available at the times and location that families require it allows parents the chance to pursue employment and training opportunities safe in the knowledge that their children are being well cared for. Childcare that provides a safe, enriching and nurturing environment allows children the opportunity to flourish through play. The contribution that childcare makes to the lives of children and their families is an important element of the anti-poverty and wellbeing agendas and there is recognition that the childcare market makes a positive contribution towards economic prosperity within the Authority.

Recruiting and retaining a highly skilled and qualified workforce is vital to ensuring that children receive the best experiences and that parents/carers are reassured that their children are being well cared for. Early Years practitioners have a key role to play in supporting vulnerable families and understanding the children in their care and the impact that Adverse Childhood Experiences (ACEs) can have on their ability to thrive.

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1. Introduction/ Context

This section describes the methodology used to undertake and approve the Childcare Sufficiency Assessment and Action Plan, and the context that underpins the work. It identifies the key challenges in undertaking the Assessment and describe the mechanism the Local Authority proposes to use to take forward the identified actions for the action plan.

Context

Local authorities are required to undertake Childcare Sufficiency Assessments (CSAs) under Section 26 of the 2006 Childcare Act on the understanding that local authorities are best placed to understand and respond to local needs.

High quality, affordable and accessible childcare plays a vital role in supporting and sustaining families, communities, and the economy and has been a key focus for delivery by the Welsh Government since at least 2006. In July 2013, the Welsh Government published 'Building a Brighter Future: Early Years and Childcare Plan'. The Plan is jointly sponsored by the Minister for Education and Skills and the Minister for Communities and Tackling Poverty with full Cabinet support. The 2013 Plan is clearly a move forward from the original Childcare Strategies published by the Welsh Government because it makes explicit links between the child and family development role of Early Years and Childcare provision and its subsequent performance in primary education.

The Early Years and Childcare Plan also identifies the following key strategic drivers to drive the development of the Early Years and Childcare sector in Wales and specifically delivery at a local authority level. These include:

- The importance of investment by the Early Years and Childcare sector in the health and wellbeing of children, the key role of strong and positive families, and the need to raise standards across early years and childcare and good quality primary education.
- The key challenge of bringing services and professionals together through multi-agency working to help prevent disadvantage influencing a child's life chances and ensuring more joined up and co-ordinated support for children and families.
- Ensuring a whole phase approach to transition into primary education and beyond.
- Ensuring delivery focused upon flexibility, accessibility, and affordability for parents.
- Approaches to improve quality of Early Years provision.

These principles underpin the local strategic context for Childcare and Early Years delivery in Merthyr Tydfil as the development of the sector is a key element of the delivery of learning for life the key priority of the Single Integrated Plan (SIP) (2014/15 update) for the local authority, and is now a critical component of the authority's proposed delivery under The Well-being of Future Generations (Wales) Act 2015. The act aims to improve the social, economic and cultural well-being of Wales by placing a duty on public bodies to think and act in a more sustainable and long-term way with Childcare seen as a key avenue through which early intervention can bring about improved sustained outcomes for communities.

The development of childcare provision is ultimately founded on a key UK research study Effective Provision of Pre-School Education (EPPE) that looked at the longitudinal impact of childcare on the outcomes for children. The EPPE study (subsequently EPPSE as it tracked outcomes up to and beyond Secondary Education), tracked 3,000 children across 141 settings, investigated the impacts of childcare on outcomes for children.

Disadvantaged children are shown to benefit significantly from good quality childcare provision, particularly when attending with children from a mix of social backgrounds. This has implications for the location of centres in areas of social disadvantage such as the Gurnos. Disadvantaged children also tend to attend 4-6 months less pre-school education than advantaged groups. The duration of pre-school experience shows significant positive effects on children's cognitive progress during pre-school for all measures.

EPPE found an important effect of the type of pre-school a child attends on their developmental progress. Fully integrated centres and nursery schools tended to promote better intellectual outcomes for children. Playgroups, private day nurseries and local authority day nursery centres had lower scores. This may have relevance for an evaluation of the type and quality of childcare provision on offer in Merthyr Tydfil.

Most recently, the Welsh Government have focussed further on the availability of childcare. Free pre-school childcare is currently offered through two policies in Wales. As part of the Foundation Phase, Local Authorities (LAs) have a statutory requirement to provide a minimum of 10 hours of free Early Years Education to three to four-year-old pre-school children for 38 weeks a year. There is considerable variation in provision between LAs with hours ranging from 10 to 25 hours with the Welsh Government providing funding for the initial 10 hours and any additional hours funded by LAs. In addition, Flying Start provides part-time childcare for all two to three-year olds living in a Flying Start area for 12.5 hours a week, 39 weeks of the year, the Flying Start Programmes covers 41% of the 0-4 population in Merthyr Tydfil.

The Welsh Government intends to offer an additional 30 hours of free childcare to three- and four-year-old pre-school children in Wales, who are currently eligible to ten free hours, and launched a consultation on how this might be delivered in August 2016, with early implementers seeking to deliver pilot offers from September 2017.

The Public Policy Institute for Wales (PPIW) modelled the impact of extending the provision of free childcare for this age group, seeking to estimate its effect on maternal employment and impacts on poverty levels. The study found no significant impact on the number of mothers in work, nor a reduction in poverty, to any substantial degree. Working families with lower incomes typically spend little on childcare, making more use of informal care provided by relatives and friends than better-off families. Therefore, longer free childcare hours offer the most benefit to more affluent families and are unlikely to raise disposable incomes for those below the poverty line. Further, the 30-hour offer for three to four-year olds is unlikely to make a large amount of difference to mothers with additional young children who fall outside of that age group.

However, the study does not model the benefits of additional time in childcare on child development discussed earlier. Increasing awareness among parents of the benefits of childcare is likely to increase uptake, with potential positive implications longer-term for cognitive and behavioural development. We would hope to investigate the effects of a 30-hour offer on child development as part of the process for completing the CSA to provide insight for MTCBC on the implications of this initiative for the childcare market in Merthyr Tydfil.

The main data collection for this document has been undertaken, with direct support of the Early Years and Childcare Team and the Family Information Service (FIS) at Merthyr Tydfil County Borough Council. On behalf of Merthyr Tydfil County Borough Council, Wavehill have worked with Pleydell Smithyman Ltd to collate a wide range of quantitative and qualitative data to enable this template to be completed.

The data collection involved reviewing or collecting evidence on the supply and demand side for childcare in Merthyr Tydfil. These pieces of evidence include:

Supply Side

- **Analysis of Family Information Service data** for Registered and Unregistered Settings in Merthyr Tydfil including data on capacity, location, opening hours, and Welsh Language provision.

- **Analysis of School Headcounts Actual and Projected** for all school types in Merthyr Tydfil.
- **Depth telephone interviews with members of the Early Years and Childcare team** to identify the key delivery challenges and details of the training and workforce development activity currently provided to the sector.

Demand Side

- **Analysis of the Self-Assessment of Service Statement (SASS) data** from the Care and Social Services Inspectorate for Wales (CSSIW) for all registered childcare providers in Merthyr Tydfil which was supplied in November 2016 covering responses from 43 Registered Childcare Settings.
- **Analysis of a range of data from MTCBC** from Education, Flying Start, Children with Disabilities, Social Services, Planning and Housing teams and Departments to illustrate key features of the children and young people within Merthyr Tydfil.
- **Analysis of a range of official statistics** from the Welsh Government, ONS, and HMRC and DWP to provide key statistical context for analysis throughout this document.
- **Telephone survey of non-CSSIW registered childcare settings** and Registered Settings that did not complete a SASS return for the CSSIW. In all contacts were attempted with 7 Registered settings and 18 Unregistered settings. In total 6 interviews were completed with Registered and Unregistered settings. These interviews used the same questions as had been completed in the SASS exercise so SASS analysis will draw upon responses from 49 (76% (49/64) of registered settings, not including Breakfast Clubs) Childcare Settings in Merthyr Tydfil. This data has been cross referenced with data supplied by the Family Information Service in Merthyr to ensure that an accurate picture of data supply is covered. The Challenges section below highlights specific difficulties experienced across the wider CSA data collection that through the regional Childcare Networks we are aware that have been replicated in other local authority areas.
- **Researcher led consultation visits with 6 childcare settings to consult with children aged 2-15.** We conducted 6 visits to Childcare settings in December 2016 and January 2017 including interviewing members of the Youth Forum. In total, we collected views from 76 children and young people.

- Alongside the visits to childcare settings, we undertook **six parent/carer focus groups** in line with the Childcare Act 2006 Guidance. These cover under-represented groups and a spread across age of children and geography across the county borough. Four groups were completed in December 2016 covering Working parents; Parents seeking work or in training; and 2 groups of parents who are unemployed and / or in low income households. Two further groups were completed in January 2017 with parents of children with special education needs or a disability, and parents seeking / using Welsh language childcare.
- A **telephone survey of employers** that interviewed 37 employers based in Merthyr Tydfil for their views on childcare in the county borough.
- A **survey of parents utilising a questionnaire supplied by Welsh Government**, but edited to facilitate response face to face and online by parents about their views on childcare provision in Merthyr. In total 274 families have fully completed and returned the questionnaire which gives us a robust sample with which to assess parental demand for Childcare services. 111 of those responses were completed online compared to over 450 online responses in 2014, despite a wider range of promotional activities including advertising on net mums and via their e-newsletter and use of social media. 115 questionnaires were completed as face to face interviews during the Santa's Grotto at the Integrated Children's Centre, other festive events and at venues such as parent & toddler groups and local shops and cafes. During this process 227 parents / carers declined to complete a questionnaire. 400 hard copy questionnaires were distributed to parents and carers through partnerships with parent & toddler groups, schools and groups but only 9 (2.25%) were returned.

Strategic Perspectives

- We have undertaken **20 depth telephone interviews with key stakeholders and partners (including umbrella organisations)** to identify strategic issues affecting childcare delivery in Merthyr Tydfil.

Presentations of key findings from the CSA work have taken place with the Early Years and Childcare Team and Senior Managers, detailed liaison with the Family Information Services Team at Merthyr Tydfil County Borough Council (MTCBC), a presentation of main findings was made to a Childcare Stakeholder Group on 28th February and feedback collated which has shaped the content in this CSA template and more detailed reporting in accompanying reports that will be available from the end of July 2017 following full write-up.

Challenges

There have been a number of very significant challenges that the Full CSA exercise has experienced this year. These have been as follows:

- CSSIW SASS data has been incomplete and inconsistent. 46 settings in Merthyr completed the CSSIW SASS exercise with seven registered settings failing to complete a return. Completion of the SASS exercise has proved to be extremely onerous for settings with its timing in June/July 2016 coinciding with the end of term for many settings, the level of detail requiring completion placing particular burdens on staff (e.g. data on utilisation by specific days in specific (October Half Term) school holidays), and that there are no automatic checks built into data collection instruments meaning some totals do not match across data collected.
- Parent/Carer Questionnaire - A Dedicated Parent/Carer Questionnaire was supplied by Welsh Government as part of the national CSA exercise to complete the required Parent/Carer survey. Local authority areas were set a target of achieving 1,000 completed returns as part of this exercise. Despite significant redesign by the Research and Evaluation teams at Pleydell Smithyman and Wavehill Ltd (contractors for the completion of the CSA) and extensive use of face to face interviews in the field, online availability, distribution of hard copy via Childcare settings, emails across Local Authority staff, advertising on local online fora, and a prize draw incentive response levels have remained low.

The length of the questionnaire, length of time required to complete (a minimum of 7 minutes), and the level of detail required, has proved to be a significant barrier to completion with 111 parents starting the questionnaire online but failing to complete and submit.

274 responses were able to be analysed (when duplicate responses and out of borough responses were removed) and this is broadly comparable with response levels (250-300) in neighboring local authorities, though this is more representative in Merthyr Tydfil covering around 10,000 households resident in the County Borough with children aged 16 or under.

2. Partnership Working and Consultation

The following organisations have all been interviewed, been directly involved in providing information for the Assessment, or have supplied information for the assessment via feedback at presentations to the Early Years and Childcare Steering Group. Specific consultations have been held with:

- Safeguarding Children Board
- Job Centre Plus SE Region Representative
- Relevant Local Authority Departments including Education, Early Years and Childcare team (including Flying Start and Childcare Development Officers), Social Services, Planning and Housing
- Umbrella/ Partner Organisations – Mudiad Meithrin, Clybiau Plant Cymru Kids Clubs, and Wales Pre-School Providers Association
- Family Information Service
- The local Play Sufficiency Assessment
- Neighbouring Local Authorities including Blaenau Gwent, Caerphilly, and RCT
- Welsh Medium Education providers including three of the four Cylch Meithrin operating in Merthyr Tydfil, and South East Region Officers at Mudiad Meithrin.

Their input has been used in the following ways:

- To identify key local strategic issues and challenges the CSA needs to address to ensure childcare provision meets local needs.
- To comment on initial findings in workshops to help identify additional analysis and review work that needs completing.
- To provide key strategic insights on challenges of managing and commissioning childcare provision and services in the county borough.
- To identify future options for the development and delivery of childcare in Merthyr Tydfil.
- To shape the Action Plan and overall analysis of future challenges for the Childcare sector in Merthyr Tydfil.

3. The Childcare Sufficiency Assessment and Local Well Being Needs Assessment

This section identifies how the Childcare Sufficiency Assessment has taken into account and has informed the Local Well Being Needs Assessment undertaken by Public Service Boards.

Data supplied in this template has, where possible, drawn directly from the reports utilised in the Local Well Being Needs Assessment for Merthyr Tydfil and seeks to utilise data at the same geographical levels as the assessment. Where possible we provide information at ward level as the administrative level most relevant to the way in which MTCBC plans its services, but it should be noted that local residents will travel across ward boundaries to access Childcare and the patterns and trends reported here are unable to fully account for these 'travel to childcare' patterns.

We have sought to update that information with material drawn from the Office for National Statistics, NOMIS, StatsWales, the Welsh Government, and other policy and research literature identified by our literature review work.

We have worked closely with the Wellbeing Lead at MTCBC in the drafting of this document and there is one key local Merthyr Wellbeing goal which the Childcare sector will play a particular lead role in. This is:

Children get the best start to life - which aims to ensure that children have a positive early experience to ensure they are ready to learn, ready for school and have good life chances. The Wellbeing goal aims to play a broad role in the life experience of young children in Merthyr Tydfil covering their experiences of play, learning, social relationships and emotional, physical and mental wellbeing. This is particularly driven by a focus to provide such benefits for those children facing existing disadvantage or those likely to experience poor life outcomes in the future. Underpinning this is the draft Wellbeing assessment for Merthyr which seeks to use Early Years and Childcare experiences to support children in having a nurturing and stimulating home environment; accessing high quality pre-school and school education, whilst also supporting mother to have good health during and after maternity, and supporting parents with literacy and numeracy so they are best able to support learning by their children.

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: It is expected that a key focus on Wellbeing should be the cornerstone of future Childcare delivery across the County Borough.

4. Population

Population Figures

According to the 2015 ONS Population estimates, there are around sixty thousand residents (59,324) in Merthyr Tydfil, which is just under 2% of the Welsh population. The pattern of population by age groups amongst the 0-17 age group in Merthyr Tydfil illustrates how the population in Merthyr is more likely to be younger than that for Wales.

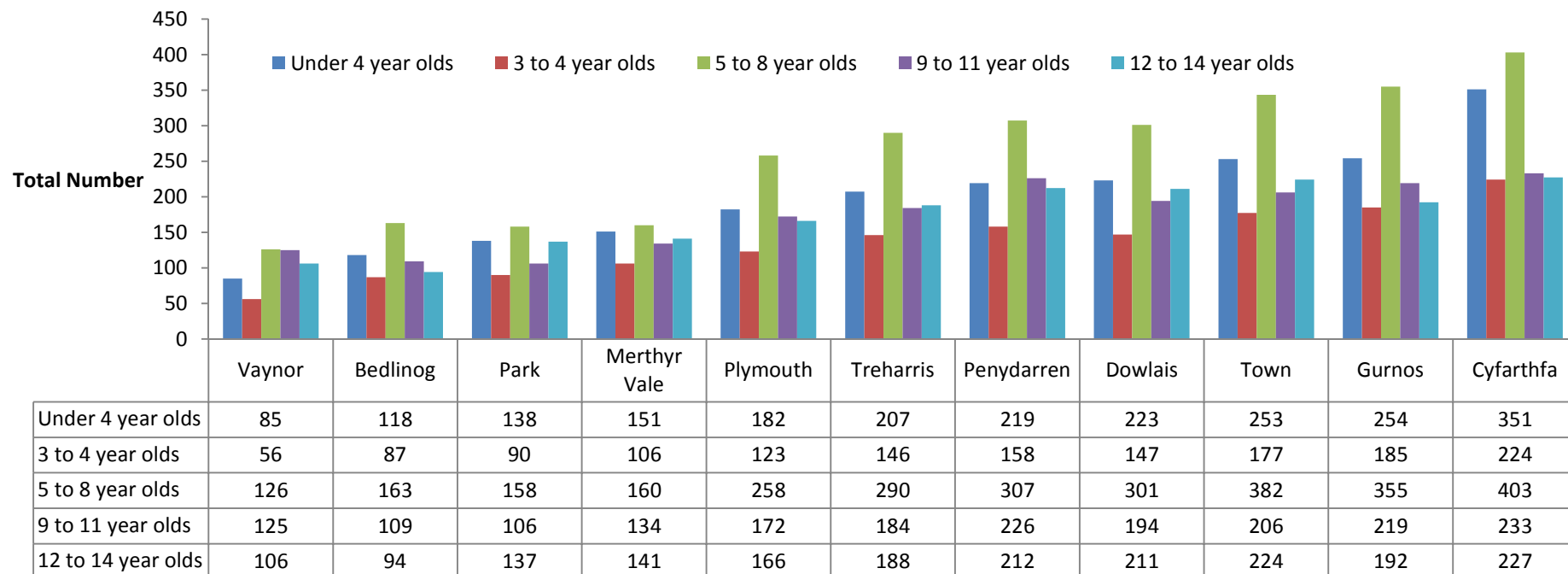
There were estimated to be over 3,500 children aged Under 4 years resident in Merthyr in 2015, representing 30 per cent of the total 0-17-year-old population. A proportion which is the 2nd highest of all the 22 local authorities in Wales.

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: The 0-4 population in Merthyr Tydfil makes up a significantly larger part of the population of the county borough than in other local authority areas in Wales, and therefore resourcing levels should reflect this fact.

The estimated numbers of children by single age bands by wards across Merthyr Tydfil has recently been made available as experimental ONS statistics. This data shows that there is an uneven distribution of the youngest Merthyr residents. Consequently, the Under 4 age group is particularly significant in Gurnos (8.2 per cent of the total resident population), Penydarren, and Cyfartha wards where it makes up a much higher proportion of the total population for that age group than for Merthyr as a whole (over seven per cent in both wards).

Figures 4.1 and 4.2 below illustrate the numbers and proportion of total population in each ward in Merthyr in 2015.

Figure 4.1: Total Numbers of Children and Young People by Age by Ward in 2015

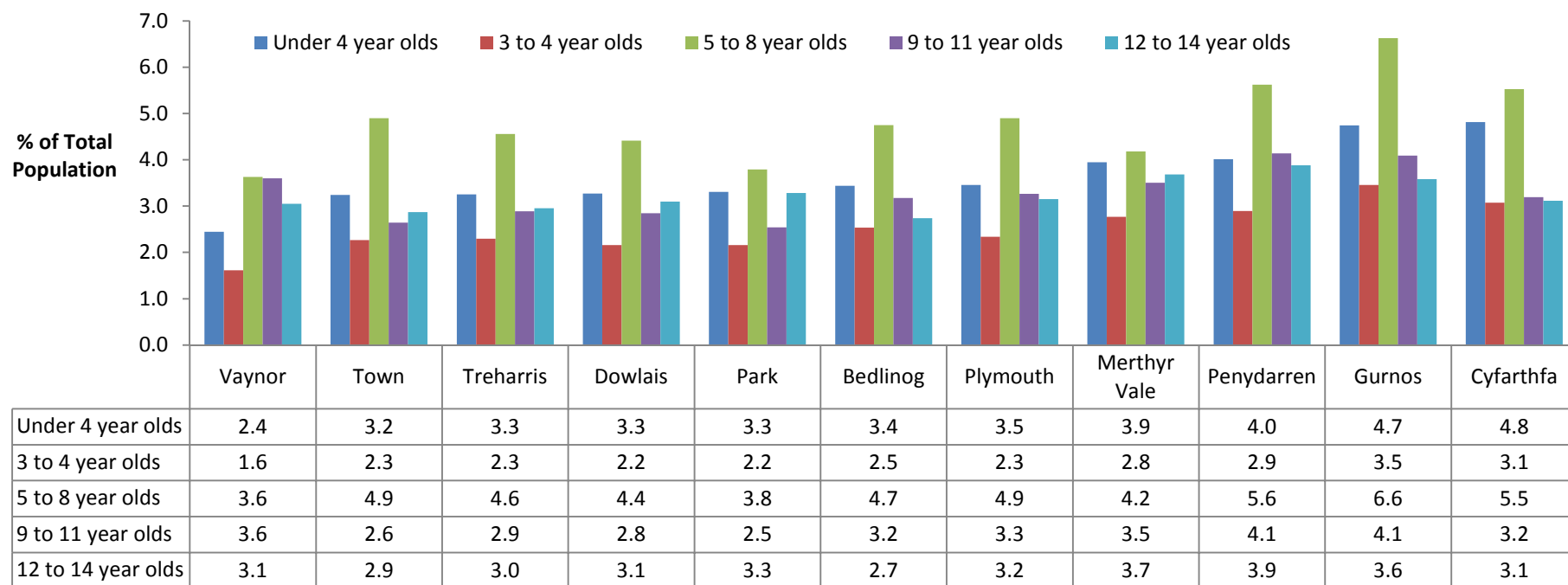


Source: ONS Experimental Small Area Population Estimates, Crown Copyright. Under 4 years old covers 1-3 year olds.

Totals for Merthyr Tydfil as a whole, from a total population of 59,272 in 2015 are as follows:

Under 4-year olds – 2,096 9 to 11-year olds – 1,903
 3-4-year olds – 1,499 12 to 14-year olds – 1,898
 5 to 8-year olds – 2,903

Figure 4.2: Proportion of Total Population Made Up by Children and Young People by Age by Ward in 2015



Source: ONS Experimental Small Area Population Estimates, Crown Copyright.

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: What these figures illustrate is that in terms of the numbers of young people the largest numbers of the youngest age groups are found in Cyfarthfa, Gurnos, Town and Dowlais wards, whilst the youngest children make up a higher than average proportion of the total population in Gurnos, Cyfarthfa, Penydarren, and Merthyr Vale. It is likely that it is in these locations there is likely to be the greatest demand for childcare.

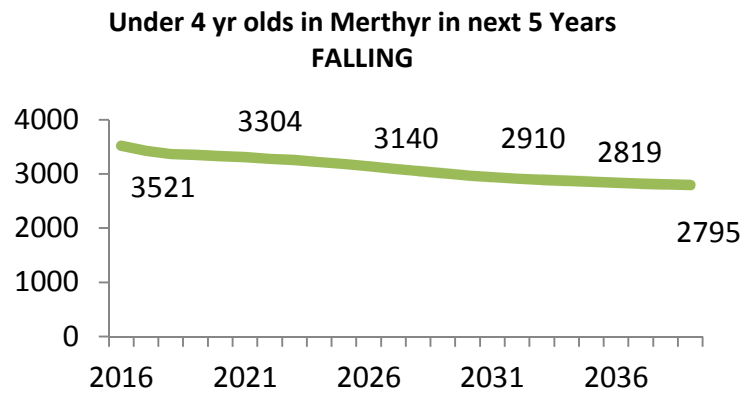
Population Projections

Population Projection figures from StatsWales and the Schools Department at MTCBC provide an overview of trends in population of the next five years (to 2021).

StatsWales projections show that to 2021:

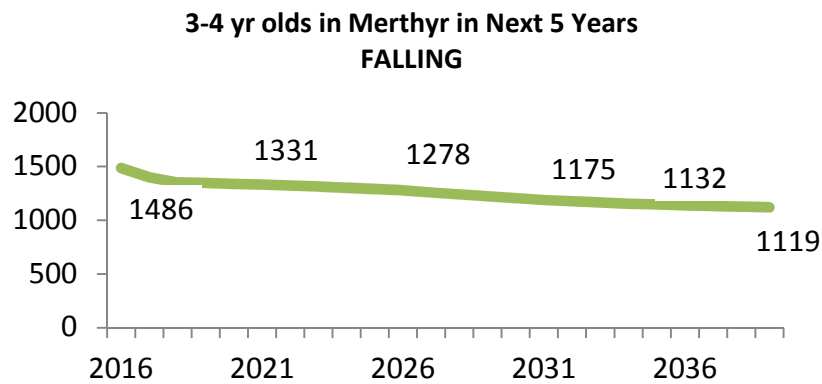
- The **Under 4 age group** is projected to decline by around 200 children and further analysis shows that this decline is likely to be more pronounced in Merthyr Tydfil than trends in neighbouring SE Wales authority areas (Blaenau Gwent, Caerphilly, and RCT) and Wales as a whole (See **Figure 4.3**).
- The **3-4 age group** is projected to decline by around 150 children and further analysis shows that this decline is likely to be more pronounced in Merthyr Tydfil than trends in neighbouring SE Wales authority areas (Blaenau Gwent, Caerphilly, and RCT) and Wales as a whole (See **Figure 4.4**).
- The **5-8 age group** is projected to decline by around 200 children and further analysis shows that this decline is likely to be more pronounced in Merthyr Tydfil than trends in neighbouring SE Wales authority areas (Blaenau Gwent, Caerphilly, and RCT) and Wales as a whole (See **Figure 4.5**).
- The **9-11 age group** is projected to increase by around 150 children and further analysis shows that this increase is likely to be slightly more pronounced in Merthyr Tydfil than trends in neighbouring SE Wales authority areas (Blaenau Gwent, Caerphilly, and RCT) and Wales as a whole (See **Figure 4.6**).
- The **12-14 age group** is projected to increase by around 300 children, more than any other age group, and further analysis shows that this increase is likely to be slightly more pronounced in Merthyr Tydfil than trends in neighbouring SE Wales authority areas (Blaenau Gwent, Caerphilly, and RCT) and Wales as a whole (See **Figure 4.7**).

Figure 4.3: Projected Trend in Number of Under 4s in Merthyr, 2016-2036



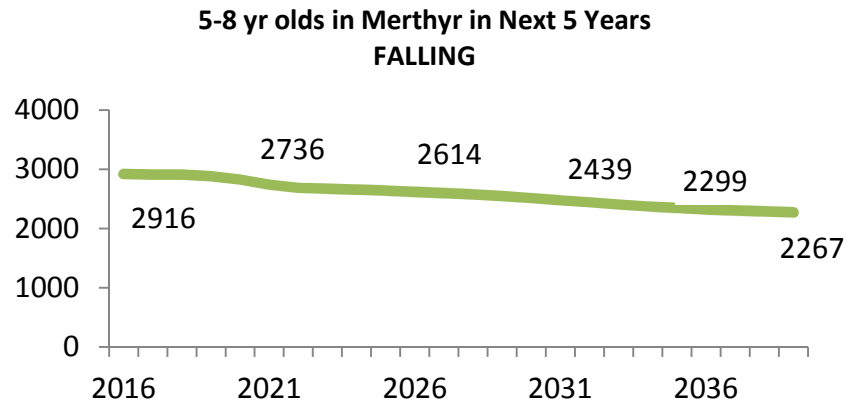
Source: StatsWales – 2014 Projections

Figure 4.4: Projected Trend in Number of 3-4s in Merthyr, 2016-2036



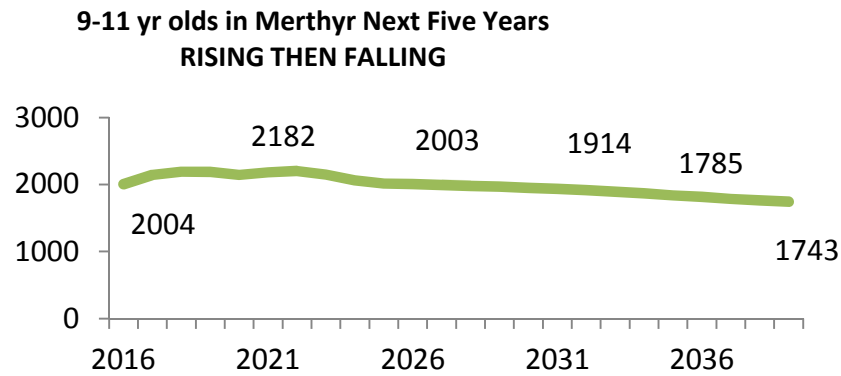
Source: StatsWales – 2014 Projections

Figure 4.5: Projected Trend in Number of 5-8s in Merthyr, 2016-2036



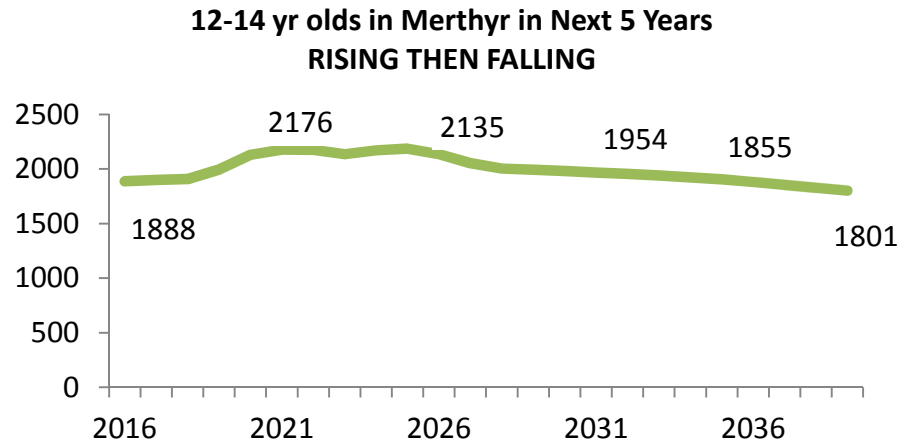
Source: StatsWales – 2014 Projections

Figure 4.6: Projected Trend in Number of 9-11s in Merthyr, 2016-2036



Source: StatsWales – 2014 Projections

Figure 4.7: Projected Trend in Number of 12-14s in Merthyr, 2016-2036



Source: StatsWales – 2014 Projections

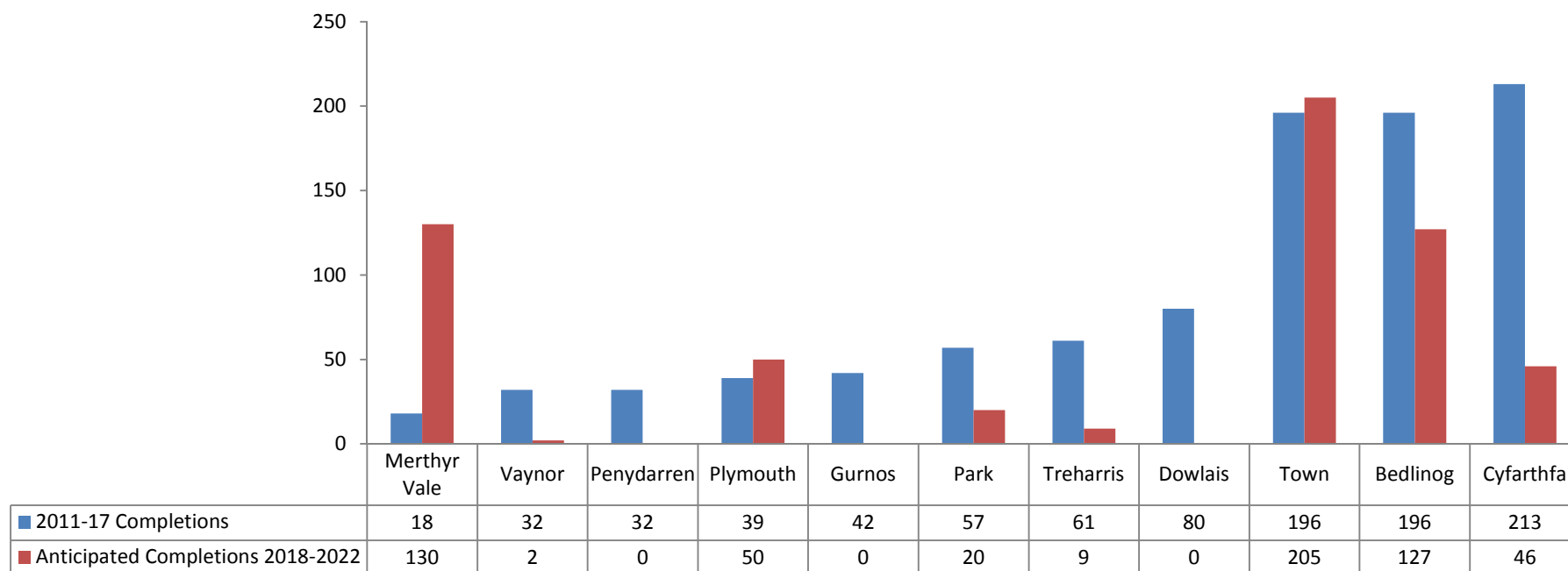
KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: Over the next five years there is likely to be a falling quantitative demand for childcare as population numbers decline for the youngest age groups, unless monitoring of birth numbers or extended housebuilding indicates an increase in the number of births, or influx of new population.

Projections from the Schools Department in Merthyr Tydfil show slightly different patterns to the projection trends (particularly at the younger age groups) above, but are more specifically tailored to the circumstances in the County Borough encompassing data from the local health authority, housing and planning information, and school roll information. These show that:

- Pre-School rolls (2-3 year-olds and Nursery age children in School) are expected to decline by around 50 children between 2016 and 2021 though existing projected headcount figures suggest there is enough provision in schools to meet these needs across the county borough, if not always in the schools in the wards within which children and their parent reside.

The latest data on housing in **Figure 4.8** overleaf shows that there have been 986 Housing Completions across Merthyr Tydfil between 2011 and 2017, with a further 589 expected up to 2022. Between 2011 and 2017 the completions have been concentrated in the most populous wards of Cyfartha and Town, but there has been significant house building activity in Bedlinog an area which with Merthyr Vale is expected to be the location of the largest number of anticipated completions between 2018 and 2022.

Figure 4.8: Number of House building Completions 2011-2017 and Anticipated Completions to 2022



Source: MTCBC Housing Department, June 2017

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: House building pressures may increase the need for Childcare in located within or close to the wards of Cyfartha, Bedlinog, Town and Merthyr Vale.

Data on Births

Live births data also shows that:

- In 2014 there were 744 Births in Merthyr, representing 2.2 per cent of all births in Wales. In 2015, this had risen to 749 live births representing 2.2 per cent of all births in Wales.
- Overall, the live births data shows that the general fertility rate in Merthyr Tydfil has exceeded the Welsh average in three of the four years from 2011 to 2014¹.
- Furthermore, the figures also show that Merthyr mothers are also more likely to have more children than the Welsh average.

There are also further features of the 'new birth' cohort which are also relevant in determining the detail of a strategic approach to the delivery of Early Years in Merthyr. These include:

- 70 per cent of births in 2015 in Merthyr Tydfil were outside marriage or civil partnership, compared with 58.6 per cent in Wales.
- 34.2 per cent of births outside marriage in Merthyr are registered by parents at different addresses (23.1 per cent in Wales).
- 10.1 per cent of births outside marriage in Merthyr area registered by single parents, compared with 10.2 per cent in Wales.
- 31.2 per cent of all mothers in Merthyr were aged 24 or younger at the time of birth compared with 25.5 per cent in Wales.
- 8.7 per cent of all births were to non-UK born mothers compared with 11.7 per cent in Wales, however 76.9 per cent of all Births to Non-UK mothers were to EU born mothers (v. 42.3 per cent in Wales) which includes individuals from Poland.
- In 2015, 60 births were of low birth weight which represented 8 per cent of all live births in Merthyr Tydfil compared to 6.8 per cent in Wales. Since 2010, this proportion has remained higher than Wales in all but one year (2012) at around 7-9 per cent in every year. In 2015, Merthyr was the 4th highest out of the 22 unitary authorities in Wales in terms of rate of low birth weight babies.

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: Childcare provision should prepare for high proportions of children coming from , larger families, from family relationships split across different home addresses, the younger mean age of parents, a greater chance of non-UK mothers from New EU countries including Poland in particular, and a greater likelihood that some children will have been low birth weight babies than in the rest of Wales and the likely development and health implications that may raise.

¹ See StatsWales for Total Fertility Rate and General Fertility Rate by area, <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/Births-Deaths-and-Conceptions/Births/totalfertilityrateandgeneralfertilityrate-by-area>

Demographic Features of Children in Merthyr Tydfil

Data from the 2011 Census also shows that Merthyr Tydfil contains a higher proportion of households with dependent children (32% compared to 28% across Wales). It also shows that a higher proportion of households containing lone parents with dependent children in Merthyr Tydfil (10%) than in Wales (8%).

Data was also drawn from the Annual Population Survey (APS) to look at the comparison between Merthyr Tydfil and Wales in terms of the proportion of working and workless households with dependent children. These estimates show that that a slightly smaller proportion of working households in Merthyr Tydfil includes dependent children (58%) than in Wales (63%), and a smaller proportion of workless households includes dependent children too (46% in Merthyr Tydfil, 48% in Wales).

Whilst the majority (94.6 per cent) of the Merthyr population, identifies their ethnic group as White British according to the 2011 Census, there are signs of changes in this pattern. There are 3,167 residents from BAME groups living in Merthyr Tydfil accounting for 5.4 per cent of the resident population, compared with 6.4 per cent for Wales. Some wards in Merthyr are marked by a higher proportion of residents from BAME groups such that in Gurnos almost one in ten (9.6 per cent) of all residents are of BAME origin, with the share being 7.2 per cent in Park, 7 per cent in Dowlais, and 6.7 per cent in Town ward.

This pattern is also apparent amongst the Under 4 year-old population (the nearest age group available) where across Merthyr there were just 287 non-White British Under 4 year olds living in Merthyr in 2011 (See **Table 4.1** overleaf). Dowlais and Gurnos wards account for 37% (105) of all BAME Under 4 year-olds. However, BAME residents make up a larger proportion of the resident population amongst Under 4 year-olds than across the whole population such that 7.9 per cent (5.4 per cent for all ages) of all Under 4 year olds in Merthyr come from BAME groups. Although is still below the 10.2 per cent in Wales. In all, there are 287 Under 4 year-olds from BAME groups living in Merthyr Tydfil in 2011. Again, Dowlais (12.2 per cent of Under 4 year-olds resident are from BAME groups), Gurnos (11.6 per cent), and Town (10.6 per cent) wards have the highest shares of BAME residents in Merthyr.

It is important to note that as the 2011 Census identifies that the Polish, Portuguese, and Filipino populations are now a significant growing feature of the resident population in Merthyr. Of the 2,641 non-UK born residents living in Merthyr in 2011, 57 per cent were born in these countries, and 20 per cent of all residents from these countries live in Gurnos ward and non-UK born people make up 5.8 per cent of all those living in Gurnos.

Table 4.1: Detailed Ethnicity for Under 4 year-olds in Merthyr Tydfil, 2011

Ethnic Group	Merthyr Tydfil	Bedlinog	Cyfarthfa	Dowlais	Gurnos	Merthyr Vale	Park	Penydarren	Plymouth	Town	Treharris	Vaynor
All Aged Under 4	3,630	176	462	426	454	225	189	380	316	463	375	164
White: English/Welsh/Scottish/Northern Irish/British	3,343	173	431	374	401	220	172	341	299	414	368	150
Non-White: English/Welsh/Scottish/Northern Irish/British	287	3	31	52	53	5	17	39	17	49	7	14
Irish	3	0	2	0	0	0	0	1	0	0	0	0
Gypsy or Irish Traveller	12	0	0	0	3	0	0	1	5	3	0	0
Other White	158	1	19	28	25	2	13	25	7	29	0	9
White and Black Caribbean	8	1	2	1	1	0	0	1	1	0	1	0
White and Black African	12	0	1	0	6	1	1	0	1	2	0	0
White and Asian	20	0	0	7	4	1	0	0	3	4	0	1
Other Mixed	19	1	2	6	2	0	0	3	0	2	2	1
Indian	11	0	0	2	1	0	0	3	0	3	1	1
Pakistani	3	0	0	1	0	0	0	2	0	0	0	0
Bangladeshi	5	0	0	0	0	1	0	0	0	4	0	0
Chinese	2	0	2	0	0	0	0	0	0	0	0	0
Other Asian	23	0	0	4	11	0	2	3	0	0	1	2
African	3	0	1	2	0	0	0	0	0	0	0	0
Caribbean	0	0	0	0	0	0	0	0	0	0	0	0
Other Black	0	0	0	0	0	0	0	0	0	0	0	0
Arab	1	0	0	0	0	0	0	0	0	1	0	0
Any other ethnic group	7	0	2	1	0	0	1	0	0	1	2	0

Source: 2011 Census, Crown Copyright

In terms of the number of children with disabilities in Merthyr Tydfil, this data is difficult to retrieve. However, according to the Family Resources Survey (2014/15)², 3% of 0-4 year-olds in the UK are disabled. Applying this to the ONS population estimate for Under 4 year-olds in Merthyr Tydfil in 2015 (3,700) provides an **estimate of 111 disabled Under 4 year olds in Merthyr Tydfil.**

This is broadly in line with figures from the **2011 Census that show there were 537 Merthyr Residents aged 0-15 who identified that they had a disability or long-term health condition** that affected their day to day life, 331 were male, 206 were female.

Figures for Disability Living Allowance suggest levels of disability may be higher showing that in May 2016 there were 70 children aged under 5 for whom DLA payments were being made, 230 5 - 10 year-olds and 230 11 to 15 year olds receiving DLA payments a total of 530 aged 15 and under in Merthyr Tydfil. This equates to 4.8% of the projected population aged 15 and under in Merthyr Tydfil compared with 4.0% in Wales as a whole.

Figures from MTCBC data illustrate that there were a total of 168 children and young people attending the Greenfield Special School in Merthyr Tydfil. **Table 4.2** provides a breakdown of these figures by broad age group.

Table 4.2: Age Profile of Greenfield Special School Pupils, January 2016

Age Group	Number of Pupils
Nursery (Age 2-3)	10
Reception (Age 4-5)	7
Years 1 -2 (Age 5-8)	10
Years 3-6 (age 8-11)	35
Years 7-11 (Age 12-16)	71
Years 12+ (Age 16+)	35
Total	168

Source: My Local School, Welsh Government - <http://mylocalschool.wales.gov.uk/>

² 2015 Family Resources Survey (2014/15) - Disability prevalence by age and gender, average of 2012/13, 2013/14 and 2014/15, United Kingdom, Office for National Statistics, Crown Copyright

Table 4.3 illustrates PLASC data for January 2016 showing the geographical spread of children and young people aged 4-18 in Merthyr Tydfil with SEN, whilst **Table 4.4** identifies the detail of the Special Educational Need they have.

These illustrate that levels of SEN are highest in Gurnos and Penydarren wards and on average around a quarter (24.5 per cent) of all children and young people aged 4-18 in Merthyr Tydfil have a SEN.

Table 4.3: Number of Pupils Aged 4-18 with SEN in Merthyr Tydfil, 2016

Ward	Number of pupils with SEN	Total Resident Population Aged 4-18	% of Population with SEN
Gurnos	410	1,148	35.7
Penydarren	359	1,130	31.8
Vaynor	103	390	26.4
Cyfarthfa	314	1,252	25.1
Dowlais	267	1,134	23.5
Merthyr Vale	142	708	20.1
Bedlinog	115	574	20.0
Plymouth	183	921	19.9
Town	231	1,236	18.7
Treharris	191	1,062	18.0
Park	112	625	17.9
Unknown	66	N/A	N/A
Total in Merthyr	2,493	10,180	24.5

Source: MTCBC Jan 2016 PLASC

Table 4.4 provides details of the SEN of children and young people aged 4-18 in Merthyr Tydfil it highlights how General and Moderate Learning Difficulties, Behavioural, Emotional and Social, and Speech, Language and Communication Difficulties are the most common forms of SEN in Merthyr Tydfil.

Table 4.4: Details of SEN Amongst Pupils Aged 4-18 years in Merthyr Tydfil, 2016

SEN Need	Number of pupils
General Learning Difficulties	1097
Behavioural, Emotional and Social Difficulties	301
Speech, Language and Communication Difficulties	275
Moderate Learning Difficulties	239
Dyslexia	141
Autistic Spectrum Disorders	135
Severe Learning Difficulties	88
Physical or Medical Difficulties	82
Hearing Impairment	41
ADHD	37
Profound and Multiple Learning Difficulties	33
Dyspraxia	12
Visual Impairment	10
Dyscalculia	<5
Multi-Sensory Impairment	<5

Source: MTCBC Jan 2016 PLASC

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: Disability and SEN levels are relatively high across Merthyr Tydfil and all Childcare providers should be aware that around 1 in 4 of all children and young people in the county borough may have an SEN, an characteristic that is more likely amongst low birth weight babies and those from more deprived home environments.

Welsh Speaking

Although below the Wales average (9% v 19%) for all age groups, the capability to speak Welsh is much more pronounced amongst the 3-19 age group than older age groups in Merthyr and is likely to mean that there could be further increases in the demand for Welsh Language provision at Early Years level as these groups become parents themselves. Thus 13% of 3-4 year-olds in Merthyr speak Welsh, rising to 27% amongst 10-14 year olds.

Although not broken down by age group the 2011 Census figures also show that residents of Treharris and Cyfartha wards have the highest levels of reported Welsh speaking capability in Merthyr.

School headcount data illustrates that there are 971 children aged 2-11 who are receiving a Welsh Medium, or English with Significant Welsh content education across three primary schools located in Merthyr Vale (2) and Town wards in Merthyr Tydfil.

Amongst Parents with dependent children aged over 3 years there are distinct differences in their ability to speak Welsh, as **Table 4.5** shows this varies from 13.7% for Parents of 3-4 year-olds to 26.9% of 12-15 year olds.

Table 4.5: Welsh Speaking Ability of Parents with Dependent Children by Age of Children, Merthyr Tydfil 2011

Age of dependent child	Total Number of Parents	Can speak Welsh	% Parents who can speak Welsh
All Parents with Children Aged 3 or Over	10,356	2,336	22.6
Child Aged 3 to 4	1,429	196	13.7
Child Aged 5 to 11	4,382	1,015	23.2
Child Aged 12 to 15	2,803	754	26.9
Child Aged 16 to 18	1,742	371	21.3

Source: 2011 Census, Crown Copyright

Poverty and Deprivation

Data from InfoBaseCymru shows that, in 2013, over a quarter (26.3 per cent) of all children in Merthyr live in poverty (% of children living in low-income families). This is substantially higher than the figure across Wales at 20.5% and there are pockets of greater child poverty within Merthyr including more than 40% of the children living in poverty in the Gurnos ward.

The 2011 Census reinforces these findings, showing that 69.3 per cent of households in Merthyr experience some form of deprivation, compared with 61 per cent in Wales. It is even higher in certain wards across Merthyr with Gurnos 82.5 per cent, Merthyr Vale 74.6 per cent, and Penydarren 74 per cent, reporting the highest proportions of their households experiencing at least some form for deprivation.

Furthermore, these figures also affect local reliance on public transport such that, in 2011, 29.7 per cent of all residents in Merthyr had no access to a car or van (22.9 per cent in Wales), the highest of all local authorities in Wales. This rises to 48.7 per cent in Gurnos ward and 34.6 per cent in Merthyr Vale. This is likely to be reflected in the relatively low levels of out of area use of childcare provision by Merthyr residents seen in **Section 11**.

Earnings

Overall, median earnings in Merthyr (£447.80 per week) for full time workers are below those in Wales (£498.30 per week) and below those in all but one neighbouring boroughs (Caerphilly £483.90 and RCT £495.40 – the exception being Blaenau Gwent £433.90).

This pattern holds for median gross weekly earning for women, such that in Merthyr women earn less than the median for Wales (£450.40 per week) at £420.60 gross per week.

For men, there is an even greater disparity between gross earnings per week in Merthyr (£474.90) than Wales (£536.60) and neighbouring boroughs (from Blaenau Gwent £486.60 per week to Caerphilly £545.30 per week.).

5. Overview – Childcare Types, Services and Places (SUPPLY)

Overall summary of data from the Family Information Service showing the existing supply of Childcare opportunities in Merthyr Tydfil.

Term Time

Table 5.1 shows the overall spread of available Childcare Spaces available in Term Time as recorded by the Family Information Service (FIS) in June 2017.

Table 5.1: Profile of All Term Time Childcare Setting Spaces by Type of Setting 2017

Ward	After School Club - Day Nursery	After School Club	Breakfast Club - Free Initiative	Childminder	Cylch Meithrin	Day Nursery	Holiday Childcare Club - Day Nursery	Holiday Childcare Club / Playscheme	Pre-School Playgroup	All Spaces	Spaces without Breakfast Clubs
Merthyr Total	174	72	805	87	82	332	0	0	307	1859	1054
Plymouth	60	0	70	4	26	92	0	0	43	295	225
Cyfarthfa	8	24	70	16	20	72	0	0	39	249	179
Gurnos	48	0	105	0	0	48	0	0	42	243	138
Town	15	0	140	6	0	49	0	0		210	70
Treharris	19	24	70	22	12	19	0	0	20	186	116
Dowlais	0	0	105	16	0	0	0	0	37	158	53
Penydarren	0	0	70	17	0	0	0	0	50	137	67
Merthyr Vale	24	0	35	0	0	52	0	0	24	135	100
Bedlinog	0	0	70	0	0	0	0	0	40	110	40
Vaynor		24	35	6	24	0	0	0	12	101	66
Park	0	0	35	0	0	0	0	0	0	35	0

Source: MTCBC FIS data

It shows that:

- **All Childcare Spaces** - FIS records a total of 1,859 spaces available in Childcare available during term time in Merthyr Tydfil, though this includes an estimated (Research in 2016 for the DfE by Kelloggs on Breakfast Club attendance suggested that on average there were 35 attendees per Breakfast Clubs in Wales) 805 places in Primary School Breakfast Clubs. 54 per cent of these places (997) are found in settings located in Plymouth, Cyfartha, Gurnos and Town wards.
- Excluding Breakfast Clubs there are 1,054 spaces in Childcare settings in the County Borough with 51 per cent located in Plymouth, Cyfartha, and Gurnos wards.
- The largest providers of term time spaces are the 332 spaces in Day Nurseries, 307 in Pre-School Playgroups, and 246 in After School Clubs.
- **After School Clubs (ASC)** - Those in Day Nurseries are the most numerous across Merthyr with provision (70 per cent of all ASC places) found in 6 wards (Plymouth, Gurnos, Merthyr Vale, Treharris, Town and Cyfartha) though 44 per cent of all spaces are located in Plymouth and Cyfartha wards.
- ASCs outside Day Nurseries are found in three wards (Cyfartha, Treharris, and Vaynor) providing 72 spaces in total. There is no current ASC provision in Dowlais, Penydarren, Bedlinog, and Park wards, despite there being significant numbers of pupils attending Primary Schools in these wards as follows: Dowlais (441 primary pupils); Penydarren (551 pupils); Bedlinog (332); and Park (382 pupils).
- **Childminders** - The 87 spaces in Childminders found in seven wards (Treharris, Penydarren, Cyfartha, Dowlais, Vaynor, Town, and Plymouth) though 82 per cent of all Childminder spaces are located in Treharris, Penydarren, Cyfartha, Dowlais wards. It is important to note that since the start of 2017 that seven Childminders have deregistered or withdrawn their services meaning the loss of 47 spaces - 24 in Treharris; 9 in Plymouth; 8 in Cyfartha; and 6 in Merthyr Vale. There are no Childminder spaces in Gurnos, Merthyr Vale, Bedlinog, or Park wards.
- **Cylch Meithrin** - the 82 Cylch Meithrin spaces are found across four wards (Plymouth, Vaynor, Cyfartha, and Treharris) though the deregistration and closure of two Meithrin in the county borough have taken 16 spaces in Park ward, and 12 spaces in Merthyr Vale. There is no Cylch Meithrin provision in Gurnos, Town, Dowlais, Penydarren, Merthyr Vale, Bedlinog, Vaynor and Park wards.
- **Day Nursery** - the 332 spaces at these settings are located across six wards - Plymouth, Cyfartha, Merthyr Vale, Town, Gurnos, and Treharris with 49 per cent of places being found in Plymouth and Cyfartha wards. There are no Day Nursery spaces in Dowlais, Penydarren, Bedlinog, Vaynor, or Park wards. The closure of the Tiny Treasures Nursery in early 2017 reduced capacity by 42 spaces and accounts for the loss of any provision in Dowlais ward.
- **Pre-School Playgroups** - the 307 spaces are spread widely across Merthyr being found in eight wards - (Penydarren, Plymouth, Gurnos, Bedlinog, Cyfartha, Dowlais, Merthyr Vale, Treharris, and Vaynor) with 57 per cent of spaces located in Penydarren, Plymouth, Gurnos, and Bedlinog wards. Town and Park wards have no Pre-School Playgroup provision.

- **Availability by Opening Hours** - **Tables 5.2 and 5.3** illustrate the change in space availability during Term Time across different opening hours - Before School (08.30am); After School, After 6pm and At Weekends. In general, this shows that outside of School Hours 9-3pm there is a significant decline in spaces such that All Childcare Spaces fall from 1,859 to 644 available after school, meaning there are 684 less spaces available after school hours. The number of term time spaces across Merthyr outside of these hours falls more substantially, with just 68 places available after 6pm and 65 spaces available at weekends. Before School spaces are heavily dependent upon Breakfast Clubs with just 370 spaces available before School starts outside of Breakfast Club provision.

Table 5.2: Total Childcare Spaces in Term Time by Opening Hours, Merthyr Tydfil

	All	All Excluding Breakfast Clubs	Before School	Before School Excluding Breakfast Clubs	After School Day	After 6pm	Weekends
Merthyr Total	1859	1054	1175	370	644	68	65

Source: MTCBC FIS data

- Across Merthyr, **Table 5.3** shows that Opening Hours vary widely across the authority area, and that Before School provision is highly, and in some areas entirely, dependent on Breakfast Club provision in Schools. Before School (excluding Breakfast Clubs) provision is not in place in Bedlinog, Park and Vaynor wards. Provision After the School Day is not available Park ward and very limited in Penydarren and Bedlinog Wards. After 6pm there are no term time spaces in Gurnos, Treharris, Merthyr Vale, Bedlinog, Park and Vaynor wards, whilst Weekend spaces are only available in Plymouth, Cyfartha, Town and Treharris.

Table 5.3: Total Childcare Spaces in Term Time by Opening Hours, Merthyr Tydfil

Term Time	All	All Excluding Breakfast Clubs	Available Before School Day	Available Before School Day Excluding Breakfast Clubs	After School	After 6pm	Weekends
Plymouth	295	225	166	96	180	4	4
Cyfarthfa	249	179	158	88	96	6	6
Gurnos	243	138	153	48	96	0	0
Town	210	105	195	90	55	49	49
Treharris	186	151	111	76	54	0	6
Dowlais	158	123	121	86	24	6	0
Penydarren	137	67	79	9	17	3	0
Merthyr Vale	135	65	87	17	76	0	0
Bedlinog	110	40	70	0	16	0	0
Vaynor	101	31	35	0	30	0	0
Park	35	0	0	0	0	0	0

Source: MTCBC FIS data

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: Childcare spaces continue to be predominantly available during existing School Hours and outside these times availability is likely to present challenges to parents who need Childcare outside school hours and particularly outside traditional 9-5 working hours, and other non-traditional work or study patterns. More flexible opening hours may need to be actively considered in future delivery planning.

Table 5.4 illustrates space availability by the Language provision of Childcare settings it shows that there are relatively few spaces in Welsh Language provision in Merthyr with a total of 82 places with such spaces only available in Plymouth, Vaynor, Cyfartha, and Treharris aligned with the Cylch Meithrin provision. English/Welsh provision predominates accounting for 80 per cent of all spaces with a total of 810 in Merthyr. This is dominated by Plymouth, Cyfartha, and Gurnos which account for 59 per cent of all English/Welsh spaces available in Merthyr. In terms of opening hours Welsh Language provision is very inflexible with none available before, or after, school, or after 6pm or at weekends.

Table 5.4: Term Time Childcare Spaces by Language of Setting

Ward	All Spaces without Breakfast Clubs	Bilingual	English	English/Welsh	Welsh
Merthyr Total	1054	74	88	810	82
Plymouth	225	0	4	188	26
Vaynor	66	0	30	12	24
Cyfarthfa	179	0	0	150	20
Treharris	116	10	0	94	12
Bedlinog	40	0	16	40	0
Dowlais	53	0	6	47	0
Gurnos	138	0	0	138	0
Merthyr Vale	100	0	24	76	0
Park	0	0	0	0	0
Penydarren	67	0	8	59	0
Town	70	64	0	6	0

Source: MTCBC FIS data

It is important to note that there are currently significant levels of out of school provision supported across Communities First clusters across Merthyr Tydfil, although these are not fully publicised via the Family Information Service. This Youth, School based, and parent focused provision currently offers substantial numbers of free places in a range of out of school activities and other support. The Welsh Government’s recent announcement (Feb 2017) about changing funding arrangements for Communities First mean that this provision faces a particularly uncertain future. One that will need to be kept under review in mid to late 2017. Details of the broad picture of provision can be found in **Figure 5.1**.

Figure 5.1: Details of Communities First Funded Additional Provision Up to Age 11 for Children and Young People

North

- 6 Youth Providers – Term Time.
- 5 Youth Providers – School Holidays.
- 14 School Based provisions.

Mid

- 13 Youth Providers – Term and School Holiday Time.
- 6 School Based provisions.

South

- 6 Youth Providers in Term and School Holiday Time.
- 16 School Based provisions.
- 3 pre-school support provision and 1 parents group.

School Holidays

Table 5.5 shows the overall spread of available Childcare Spaces available in Term Time as recorded by the Family Information Service (FIS) in June 2017. This clearly shows that there is a distinct change in the availability of Childcare Spaces in Merthyr in school holidays, though as we shall see later this mirrors demand patterns as parents seeks to use childcare much less in school holidays than term time. Thus, available spaces fall from 1,859 (including Breakfast Club spaces) or 1,054 without to 718, however it is also noticeable how the geography of provision also changes.

Table 5.5: Profile of All School Holiday Childcare Setting Spaces by Type of Setting 2017

Ward	After School Club - Day Nursery	After School Club	Breakfast Club - Free Initiative	Childminder	Cylch Meithrin	Day Nursery	Holiday Childcare Club - Day Nursery	Holiday Childcare Club / Playscheme	Pre-School / Playgroup	All Spaces
Merthyr Total	0	0	0	81	0	332	167	88	50	718
Plymouth	0	0	0	4	0	92	60	24	24	204
Gurnos	0	0	0	0	0	48	48	0	26	122
Cyfarthfa	0	0	0	16	0	72	8	24	0	120
Merthyr Vale	0	0	0	0	0	52	24	0	0	76
Town	0	0	0	6	0	49	0	0	0	55
Treharris	0	0	0	16	0	19	19	0	0	54
Vaynor	0	0	0	6	0	0	0	24	0	30
Dowlais	0	0	0	16	0		8	0	0	24
Penydarren	0	0	0	17	0	0	0	0	0	17
Bedlinog	0	0	0	0	0	0	0	16	0	16

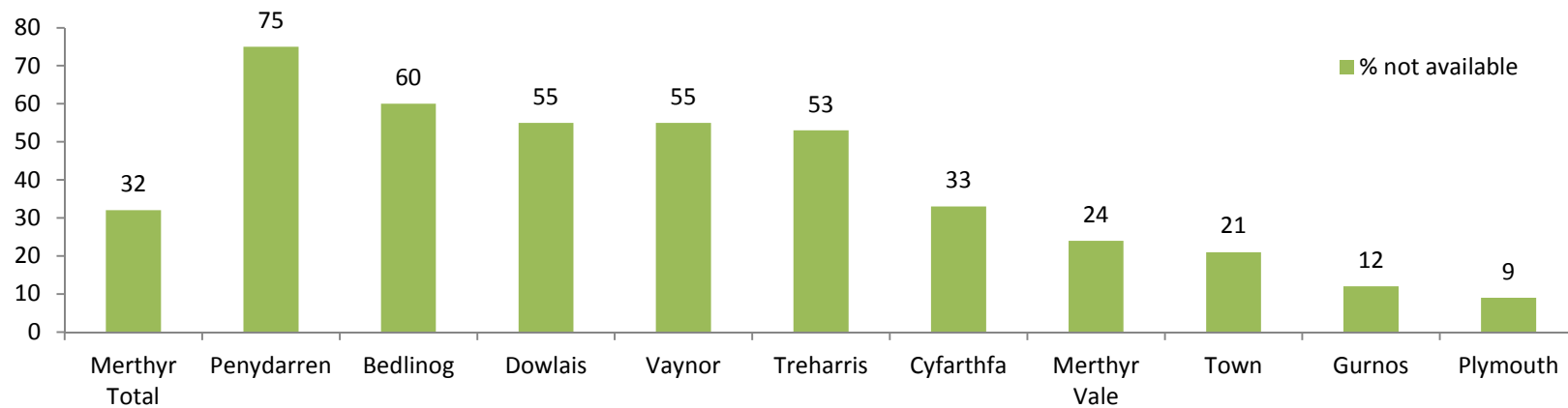
Source: MTCBC FIS data

It shows that:

- **All Childcare Spaces** - FIS records a total of 718 spaces available in Childcare available during school holidays in Merthyr Tydfil. 62 per cent of these places (446) are found in settings located in Plymouth, Gurnos and Cyfartha wards, and it is these wards that show the smallest declines in space availability between Term Time and holiday.
- The largest providers of term time spaces are the 332 spaces in Day Nurseries with all of these maintained on an all year basis, 167 in Day Nursery Holiday Schemes, 88 in Holiday Schemes in other settings, and 81 in Childminders.

Figure 5.2 illustrates the % change in availability of spaces between Term Time and School Holidays across wards. Overall, 35% of spaces, excluding Breakfast Clubs, available in Merthyr in Term Time are unavailable. Retention of spaces between Term Time and the School Holidays in best in Merthyr Vale, Town, Gurnos, and Plymouth wards where more than 75 per cent of all spaces are retained. However, retention is worst in Penydarren, Bedlinog, Dowlais, Vaynor, and Treharris where more than half of all spaces available in Term Time are unavailable in the school holidays.

Figure 5.2: Proportion of All Childcare Spaces (excluding Breakfast Clubs) Available in Term Time Not Available in School Holidays



Source: MTCBC FIS data

- **Childminders** - The 81 (compared with 87 in Term Time) spaces in Childminders found in seven wards (Penydarren, Treharris, Cyfartha, Dowlais, Vaynor, Town, and Plymouth), 80 per cent of all Childminder spaces are located in Treharris, Penydarren, Cyfartha, Dowlais wards. It is important to note that since the start of 2017 that seven Childminders have deregistered or withdrawn their services meaning the loss of 47 spaces - 24 in Treharris; 9 in Plymouth; 8 in Cyfartha; and 6 in Merthyr Vale. There are no Childminder spaces in the School holidays in Gurnos, Merthyr Vale, Bedlinog, or Park wards.
- **Cylch Meithrin** - none of these settings are open in the School Holidays.
- **Day Nursery** - the 332 spaces at these settings are located across 6 wards - Plymouth, Cyfartha, Merthyr Vale, Town, Gurnos, and Treharris with 49 per cent of places being found in Plymouth and Cyfartha wards. There are no Day Nursery spaces in Dowlais, Penydarren, Bedlinog, Vaynor, or Park wards.
- **Holiday Childcare** - of the 255 Holiday Childcare spaces 167 (65 per cent) are located in Day Nursery settings in Plymouth, Gurnos, Merthyr Vale, Treharris, Dowlais, and Cyfartha with 65 per cent of these found in Plymouth and Gurnos wards. Holiday Childcare in other settings provides 88 spaces found in Bedlinog, Cyfartha, Plymouth, and Vaynor wards. There is not Holiday Childcare available in Park, Penydarren, and Town wards.
- **Pre-School Playgroups** - there are 50 spaces (compared with 307 in term time) are only found in two wards - (Plymouth, and Gurnos) all other wards have no Pre-School Playgroup spaces in the summer holidays.
- **Availability by Opening Hours** - **Tables 5.6 and 5.7** illustrate the change in space availability during the School Holidays across different opening hours - Before School (08.30am); After School, After 6pm and At Weekends. In general, this shows that, like in Term Time, outside of School Hours 9-3pm there is a relatively small decline of 37 spaces such that All Childcare Spaces available in School Holidays fall from 718 to 681 available after school, but this means that there are more places available after the school day available in the school holidays than there are in term time, whilst those spaces that are available After 6pm and Weekends whilst low a retained completely for these times during the school holidays. Before School spaces are more numerous during school holidays.

Table 5.6: Total Childcare Spaces in Term Time v. School Holidays by Opening Hours, Merthyr Tydfil

	All Excluding Breakfast Clubs	Before School Excluding Breakfast Clubs	After School Day	After 6pm	Weekends
Term Time	1054	370	644	68	65
School Holidays	718	558	681	68	65
Difference between Term Time and School Holidays	-336	188	37	0	0

Source: MTCBC FIS data

- Across Merthyr, **Table 5.7** shows that Opening Hours vary less widely than they do across School Holiday provision across the authority area than they do in Term Time. Before School (excluding Breakfast Clubs) provision is not in place in Bedlinog, Park and Vaynor wards. Provision After the School Day spaces are not available Park and Bedlinog Wards, and are limited in Dowlais and Penydarren wards. After 6pm there are no School Holiday spaces in Gurnos, Treharris, Merthyr Vale, Bedlinog, Park and Vaynor wards, whilst Weekend spaces are only available in Plymouth, Cyfartha, Town and Treharris but these match gaps in spaces in term time.

Table 5.7: Total Childcare Spaces in the School Holidays by Opening Hours, Merthyr Tydfil

School Holidays	All	Before School	After School	After 6pm	Weekends
Merthyr Total	718	558	681	68	65
Plymouth	204	156	172	4	4
Gurnos	122	96	96	0	0
Cyfarthfa	120	88	120	6	6
Merthyr Vale	76	76	76	0	0
Town	55	55	70	49	49
Treharris	54	54	84	0	6
Vaynor	30	0	30	0	0
Dowlais	24	24	16	6	0
Penydarren	17	9	17	3	0
Bedlinog	16	0	0	0	0
Park	0	0	0	0	0

Source: MTCBC FIS data

Table 5.8 illustrates space availability by the Language provision of Childcare settings it shows that there are no spaces in Welsh Language provision in Merthyr in the School Holidays. English/Welsh provision predominates accounting for 80 per cent of all spaces with a total of 571 spaces (compared with 810 in Term Time) in Merthyr. This is dominated by Plymouth, Gurnos and Cyfartha wards which account for 77 per cent of all English/Welsh spaces available in Merthyr.

Table 5.8: School Holiday Childcare Spaces by Language of Setting

Ward	All Spaces without Breakfast Clubs	Bilingual	English	English/Welsh	Welsh
Merthyr Total	718	0	88	571	0
Plymouth	204	0	4	200	0
Gurnos	122	0	0	122	0
Cyfarthfa	120	0	0	120	0
Merthyr Vale	76	0	24	52	0
Town	55	49	0	6	0
Treharris	54	10	0	44	0
Vaynor	30	0	30	0	0
Dowlais	24	0	6	18	0
Penydarren	17	0	8	9	0
Bedlinog	16	0	16	0	0
Park	0	0	0	0	0

Source: MTCBC FIS data

6. Understanding the Needs of Parents/ Carers

6.2. Current Use of Childcare – Demand

6.2.1. Analysis of Current Use of Childcare Provision from CSSIW SASS Data illustrating demand for Childcare Services in Merthyr Tydfil.

Categorisation of Childcare Setting Types is different in the CSSIW SASS data from that recorded in the FIS data from Merthyr Tydfil which has limited the amount of analysis we have been able to do because the SASS data is anonymised and we are unable to work out precisely the details of individual settings. Consequently, we have sought to highlight some of the key topline features of demand for Childcare services across those settings in Merthyr to have completed the SASS return before providing a summary of the patterns of supply and demand across Merthyr Tydfil.

Demands for Childcare Services - Term Time and School Holidays

Table 6.1 shows the use by all Children across settings in Merthyr, it illustrates the stark difference in take up between term time and school holidays such that 1,234 children are identified as using a Childcare setting in term time compared with 375 during the school holidays - a 70% fall in take up between these two-time periods. We can also see that there is a stark difference across different parts of the county borough.

Table 6.1: Children Using Childcare Settings in Term Time and School Holidays, Merthyr 2016

Ward	Total Children Using Term Time	Total Children Using Holidays	Difference	% Difference
Merthyr Total	1234	375	-859	-70
Vaynor	14	0	-14	-100
Town	82	3	-79	-96
Penydarren	76	5	-71	-93
Dowlais	94	14	-80	-85
Treharris	179	46	-133	-74
Cyfartha	295	77	-218	-74
Merthyr Vale	95	36	-59	-62
Plymouth	238	109	-129	-54
Bedlinog	35	17	-18	-51
Gurnos	126	68	-58	-46
Park	0	0	0	0

Source: CSSIW SASS data and Wavehill Setting Interviews

Consequently, Vaynor, Town, Penydarren, and Dowlais all see a decline of take up between term time and school holidays in excess of 75 per cent, whilst Plymouth, Bedlinog and Gurnos decline by around 50 per cent over these time periods. However, all parts of Merthyr show that there is a significant drop in demand between term time and school holiday provision.

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: Demand for Childcare is significantly focused on delivery in term time and supply needs to be maintained to meet this focus of demand.

One very useful set of data from SASS is the age profile of children attending Childcare settings in Merthyr Tydfil illustrating a picture of Childcare demand that has not previously been available.

This is illustrated in **Tables 6.2 and 6.3** below.

Table 6.2: Age Profile of Term Time Childcare Users by Ward in Merthyr 2016

	Under 2	2 Year Olds	3 Year Old	4 Year Olds	5-7 year olds	8-11 Year Olds	12+ Year Olds	All Ages	% from Under 4 year olds
Merthyr Total	214	460	293	48	133	85	1	1234	78.4
Cyfartha	55	100	65	5	36	34	0	295	74.6
Plymouth	44	90	70	11	13	10	0	238	85.7
Treharris	22	57	38	7	32	23	0	179	65.4
Gurnos	22	60	17	11	11	5	0	126	78.6
Merthyr Vale	10	30	26	7	16	6	0	95	69.5
Dowlais	23	51	10	4	5	1	0	94	89.4
Town	23	19	16	3	18	3	0	82	70.7
Penydarren	15	30	25	0	2	3	1	76	92.1
Bedlinog	0	15	20	0	0	0	0	35	100
Vaynor	0	8	6	0	0	0	0	14	100
Park	0	0	0	0	0	0	0	0	0

Source: CSSIW SASS data and Wavehill Setting Interviews

Although some data is missing for term time use with age data not recorded for 41 children and young people the tables still provide a clear indication of the age groups from where the main demand for childcare is generated in Merthyr Tydfil, namely the Under4 year old age group. Consequently, Under 4 year-olds account for 78 per cent of all term time Childcare users in Merthyr. This proportion is highest in Bedlinog and Vaynor where all Childcare users are aged under 4, 92 per cent of those in Penydarren, 89 per cent in Dowlais and 86 per cent in Plymouth ward. Users in Treharris have a slightly older age profile.

Table 6.3 shows that this pattern is repeated in broad terms for school holiday demand with 69 per cent of all demand coming from the Under 4 age group, though it is notable that there are small groups in Merthyr Vale, Penydarren, and Town wards where demands for school holiday childcare come from those aged 5-11 years.

Table 6.3: Age Profile of School Holiday Childcare Users by Ward in Merthyr 2016

	Under 2	2 Year Olds	3 Year Old	4 Year Olds	5-7 year olds	8-11 Year Olds	12+ Year Olds	All Ages	% from Under 4 year olds
Merthyr Total	96	99	61	37	53	28	1	375	68.3
Plymouth	28	36	24	10	7	4	0	109	80.7
Cyfartha	26	18	11	6	10	6	0	77	71.4
Gurnos	23	18	9	6	8	4	0	68	73.5
Treharris	16	15	11	2	2	0	0	46	91.3
Merthyr Vale	0	0	0	8	17	11	0	36	0.0
Bedlinog	0	6	5	2	4	0	0	17	64.7
Dowlais	3	4	1	2	3	1	0	14	57.1
Penydarren	0	1	0	0	1	2	1	5	20.0
Town	0	1	0	1	1	0	0	3	33.3
Vaynor	0	0	0	0	0	0	0	0	0
Park	0	0	0	0	0	0	0	0	0

Source: CSSIW SASS data and Wavehill Setting Interviews

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: Childcare demand is mostly derived from the needs of parents of Under 4 year-olds in Merthyr with the largest demand coming from those aged 2 years, responding to this ongoing demand is a key target for Childcare provision in the county borough. It is also notable that there is a clear drop off in the demand for Childcare once children reach the age of 11 years.

If we match these patterns of demand to population figures at a ward level, we see that across Merthyr 34 per cent of all Under 4 year-olds are accessing term time child care, whilst 15 per cent of 0-11 year olds in Merthyr are doing the same. Rates across wards illustrate some significant patterns with the particular concentration of Childcare provision in Plymouth ward providing care for what could be 87 per cent of all under 4 year-olds in the ward, though we cannot be sure from the available SASS figures that all the 204 Under 4 year olds at settings in Plymouth ward are in fact Plymouth residents, and it is likely that a number of them are from other parts of Merthyr Tydfil.

Table 6.4: Proportion of Children by Age Group in Term Time Childcare in Merthyr

	Under 4 Year Olds 2015	Under 4 Year Olds in Term Time Childcare	% of Under 4s in Childcare	0-11 Year Olds in 2015	0-11 Year Olds in Term Time Childcare	% of 0-11s in Childcare
Merthyr Tydfil	2,821	967	34.3	8,098	1233	15.2
Cyfarthfa	465	220	47.3	1,191	295	24.8
Gurnos	341	99	29.0	1,011	126	12.5
Town	327	58	17.7	1,005	82	8.2
Dowlais	325	84	25.8	902	94	10.4
Penydarren	300	70	23.3	920	75	8.2
Treharris	280	117	41.8	822	179	21.8
Plymouth	234	204	87.2	735	238	32.4
Merthyr Vale	208	66	31.7	552	95	17.2
Park	177	0	0.0	481	0	0.0
Bedlinog	164	35	21.3	479	35	7.3
Vaynor	113	14	12.4	397	14	3.5

Source: CSSIW SASS data and Wavehill Setting Interviews; Population Estimates SAPE 2015, ONS, Crown Copyright. Under 4 covers 0-4 year olds here.

Table 6.5 illustrates that the reach of Childcare provision in School Holidays is, because of the lower numbers involved, much less pronounced across Merthyr. Therefore, there are around 9 per cent of all Under 4 year-olds in Merthyr accessing School Holiday childcare, whilst amongst 0-11 year olds the reach is to around five per cent of this age group.

Table 6.5: Proportion of Children by Age Group in School Holiday Childcare in Merthyr

	Under 4 Year Old 2015	Under 4 Year Olds in School Holiday Childcare	% of Under 4s in Childcare	0-11 Year Olds	0-11 Year Olds in School Holiday Childcare	% of 0-11s in Childcare
Merthyr Tydfil	2,821	256	9.1	8,098	374	4.6
Cyfarthfa	465	55	11.8	1,191	77	6.5
Gurnos	341	50	14.7	1,011	68	6.7
Town	327	1	0.3	1,005	3	0.3
Dowlais	325	8	2.5	902	14	1.6
Penydarren	300	1	0.3	920	4	0.4
Treharris	280	42	15.0	822	46	5.6
Plymouth	234	88	37.6	735	109	14.8
Merthyr Vale	208	0	0.0	552	36	6.5
Park	177	0	0.0	481	0	0.0
Bedlinog	164	11	6.7	479	17	3.5
Vaynor	113	0	0.0	397	0	0.0

Source: CSSIW SASS data and Wavehill Setting Interviews; Population Estimates SAPE 2015, ONS, Crown Copyright. Under 4 covers 0-4 year olds here.

Data from SASS on vacancies and waiting lists suggests that existing Childcare provision is meeting most demands. Table 6.6 shows there were vacancies reported by settings providing SASS data showing with the most vacancies reported amongst After School providers and those offering Half Day Nursery spaces. This suggests that existing provision has further capacity should it be needed.

Table 6.6: Reported Vacancies by Childcare Settings in Merthyr Tydfil

Vacancies	Total
Full Day Care	50
Half Day AM	20
Half Day PM	11
Playgroup AM	10
Playgroup PM	9
Before School	82
After School	105
Wrap Around	50
Lunch	14
Holiday Provision AM	35
Holiday Provision PM	36
Full Day Nursery	31
Half Day Nursery AM	121
Half Day Nursery PM	135
Play Scheme Mornings	42
Play Scheme Afternoons	29

Source: CSSIW SASS data and Wavehill Setting Interviews.

This is borne out by figures showing that very few settings reported waiting lists as **Table 6.7** illustrates below showing that only a very few providers were reporting waiting lists for provision.

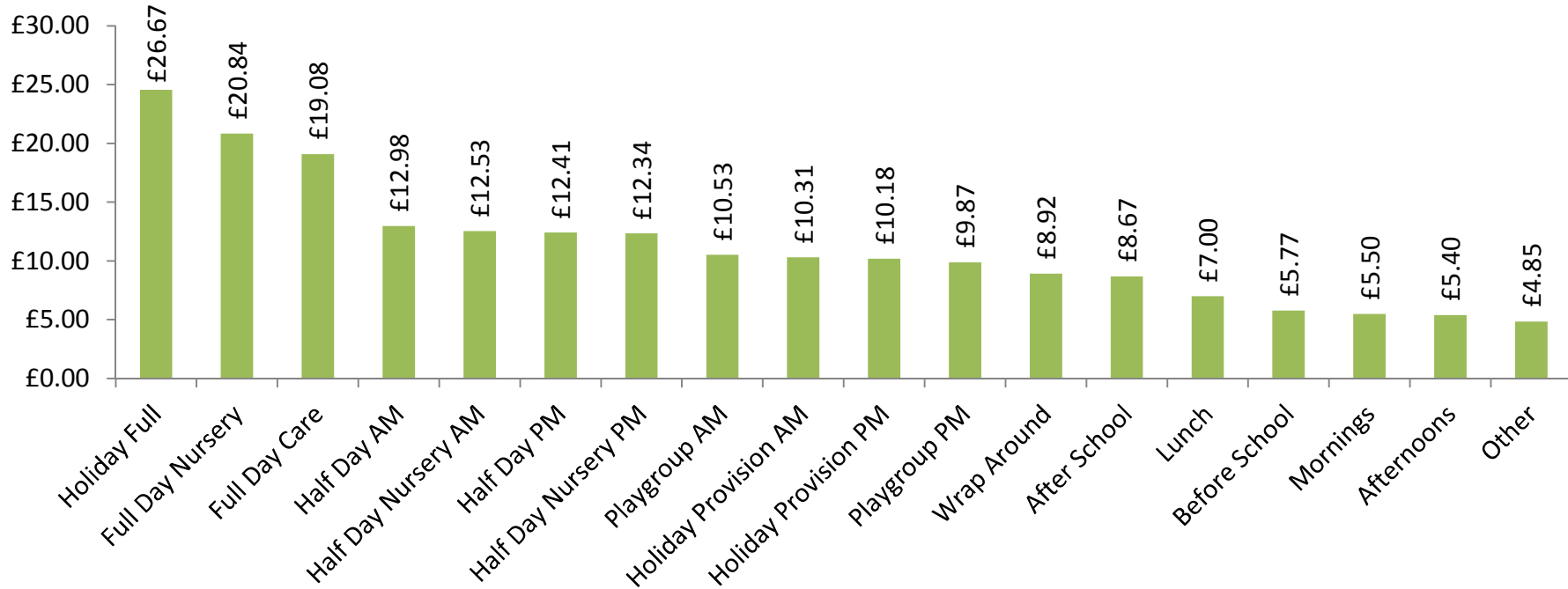
Table 6.7: Waiting Lists for Childcare Identified by Merthyr Settings

	Term Time (Providers)	Number on Waiting List	School Holidays (Providers)	Number on Waiting List
Child Minder	1	2	1	2
Children's Day Care	3	12	1	56
Total	4	14	2	58

Source: CSSIW SASS data and Wavehill Setting Interviews.

Demand is clearly challenged by the costs associated with its use as **Figure 6.1** overleaf illustrates with mean session costs identified from the SASS data show significant variance with the most expensive school holiday provision, also being the most expensive of all provision in Merthyr which costs £26.67 per session in Full Day provision in Holiday provision, and yet the cheapest School Holiday Provision is for sessional options at a mean session price of £10.30 for a Morning or Afternoon Holiday club session. It is worth noting that the most expensive 1-week full day care, most would cost c.£240 per week. This would represent 57% of the median gross weekly wage of a female full-time worker in Merthyr Tydfil in 2016.

Figure 6.1: Mean Hourly Session Costs by Type of Childcare (Term Time and School Holidays)



Source: CSSIW SASS data and Wavehill Setting Interviews

KEY PLANNING CONSIDERATION ARISING FROM CSA EVIDENCE: Whilst median wage levels for residents of Merthyr Tydfil remain below those of workers in neighbouring boroughs Childcare costs will remain a continuing concern for all.

This perspective is borne out in findings from survey work with Parents in Merthyr.

6.3. Demand for Childcare Provision - Parent Perspectives

Understanding the Needs of Parents/ Carers

Overview of Respondents

In total 216 parents and carers completed the questionnaire, of which:

- 97% were parents
- 2% currently expecting their first child;
- 1% a parent and expecting another child.
- 60% of respondents described their national identify as Welsh, with 87% of questionnaires being completed by people who would describe their ethnic group as White: Welsh / English / Scottish /Northern Ireland / British.
- Between them the respondents had 421 children with families ranging in size from 1 to 6 children, with the average family size of respondents being 2 children.
- 16% of those families who participated in the survey had one or more children with a disability or long-term illness.
- 7% of questionnaires were completed by families where one or both parents / carers had a disability or long-term illness.

In broad terms, parental attitude trends remain broadly similar to previous CSA work in 2014.

Services Being Used

The information below summarises childcare services currently being used and parent's perceptions of them; it also explores decision making processes associated with selection. Please note that some families are using more than one type of childcare.

Day Nursery - full day care provision

42 families are using Day Nursery provision, with children ranging in age from 16 months to 7 years. This equates to just over half of childcare users who responded to the questionnaire (53%) and the majority of these families (42.5%) are using full day care nursery provision. During focus groups, there was a preference for nursery provision among some parents and carers in part because of trust issues *"I'm not sure about childminders; at least with a nursery you know there are other people there as well. Keeping an eye on things."* The selection of nursery provision tends to be based on a recommendation from a friend or family member, *"he'll be going to Little Rascals because his friends from this group (parents and toddlers) are going there."* Those parents and carers using nursery provision are happy with the quality of care they are receiving and spoke about seeing improvements such as social skills, sharing better with other children and potty training. Nursery was seen by some parents as a pathway to school and an important phase in preparation. The majority of families using nursery provision are doing so because one or more parents are working.

Childminders

14 families are using childminders to provide childcare for 21 children between 9 months and 10 years of age, this equates to 17.5% of childcare users, with the majority of families using childminders to provide full day care. Qualitative evidence from the focus groups phases shows that the selection of childminders is very much dependent on a recommendation *"I wouldn't have chosen a childminder if my friend hadn't recommended her so highly. I need to know from someone I trust that she could be trusted."* Some parents have opted to use nurseries because their first and only choice childminder wasn't available. Parents using childminders were seeing the benefits in terms of development of social and learning skills, there was also a belief that childminders provided more specialist care *"he'd get a lost in a larger group of children, with our childminder I know there's only three children so he gets attention and doesn't feel overwhelmed."*

Sessional Day Care

15 families are using sessional day care, for 15 children between 1 and 3 years of age. The nature of sessional day care means that usage tends to focus on social benefits for children rather than to enable parent/s to return to work. Cylch Meithrin were also seen as an important element of Welsh language / bilingual provision in the area and were seen by parents specifically looking for Welsh language provision as a strength of the sector.

Flying Start

It could be argued that in Merthyr Tydfil Flying Start is enabling a number of families who might otherwise be non-users to access childcare. 28 families who responded to the questionnaire were using Flying Start provision; of which one third were using it specifically because it was a free entitlement. In 17% of families where only some of the children are in childcare, it is because one child is entitled to Flying Start. 14% of those planning to use childcare in the future are doing so because they will be taking advantage of their entitlement. Families within the Flying Start areas see the free childcare element as the cornerstone of the offer, *“I can’t wait till he starts Flying Start it will benefit him and me”* and *“I stopped using childcare because I moved out a Flying Start postcode and couldn’t afford to pay for it.”*

Out of School Care

18 respondent families are using out of school care, equating to 22.5% of childcare users. Along with open access play this is the type of formal provision most likely to be used for older children, with respondents using out of school care for children up to 10 years of age. 14 respondents use after school clubs, 13 breakfast clubs and 9 both. In focus group discussions, a number of parents spoke of frustration that this provision didn’t reflect their working day and open too late and closed too early, *“if breakfast club would just open half an hour earlier my day would work so much better”*.

Open Access Play

5% of childcare users (4 families) are using open access play provision to provide care for children aged between 8 and 10 years of age. The majority of usage is on an ad hoc basis during term time. None of the parents who participated in focus groups were using open access play provision.

Nanny

None of the families who responded to the questionnaire or engaged in focus group sessions are using a Nanny, and there are no such facilities available currently registered in Merthyr.

Family and Friends

Consistently in focus groups both users and non-users spoke of a preference for family and friends, because of range of factors including trust, flexibility and cost. 55% of non-users rely on family and friends to look after their children and 20% of users augment their childcare with family and friends. In focus groups parents would often speak of a balance between formal and informal childcare. It should also be noted that for many parents their preference would be to stay at home with their children if they could afford to *“I’d stay off forever”, “I wouldn’t work, it’s going to be really difficult for me to go back to work.”*

Number of Places Required for Children who have Special Educational Needs or who Require Specialist Care Due to a Disability

Of those families who responded to the questionnaire, 49 had children with special educational needs or a disability, to support the questionnaire we also undertook a focus group of parents whose children have additional needs.

55% of respondents in this group have opted not to use childcare, with cost (30%) being the biggest barrier. In discussions parents spoke of finding it challenging to find childcare, essentially because they desire additional assurance to make the step towards using provision. *“It was hard finding childcare I felt comfortable with I had to have a lot of conversations with the manager to convince me they understood my child’s needs. Even now I’m never fully comfortable.”* For many non-users, no level of assurance would be sufficient *“I’m not 100% certain they could look after my child as well as me. She’s my responsibility and I will look after her”* and *“I can be sure with my mum, she knows what my child can and can’t eat. I’m not away from her wondering if she’s okay.”*

27% of this group are using one or more types of childcare including full day care (62% of families with additional needs who use childcare), crèche (33%) and childminders (31%). 73% of families of children with SEN needs agree that they are satisfied with the quality of their childcare in term time, but this reduces significantly to 31% in school holidays. This is consistent with other groups and will be discussed further in the barriers to childcare section of this assessment.

Of those families planning to use childcare in the future 10.5% have a child/children who will require additional support because of special educational need or disability, this was supported by discussions with parents who expressed a belief that their options were limited because of a number of factors including a preference for knowing the provider had worked with a child / children with the same needs as their own.

Number of places used by language category

To build on the data from the questionnaire we held a focus group session specifically for parents looking for or using Welsh language childcare. The information below brings together the qualitative and quantitative information from this process.

Among those families who responded to the questionnaire 83% speak English as their primary language at home, 14% are bilingual and 2% speak Welsh, with the remaining families declining to answer the question.

A small proportion (1.3%) of families are not using childcare because “there is no suitable Welsh medium provision”. In addition, 13% of non-users who might consider childcare in the future said language choice would be a factor in their decision-making process, of this group 30% would require Welsh language provision and 40% Welsh & English.

During term-time 45% of childcare provision is Welsh & English or English and some bilingual elements. Across the focus groups Welsh or bilingual provision was seen as desirable rather than an essential, with the majority of parents putting liking the provider, affordability and accessibility (opening times and location) above language. In the specific group for parents looking for or using Welsh language childcare, Welsh was higher on the list but ultimately it was about finding childcare that works for the family *“I need childcare as my job doesn’t fit with school. I don’t have the luxury of holding out for a Welsh language provider.”*

Half of parents agree there is enough childcare in the language of their choice, 20% disagree with the remaining respondents not sure. Discussions in focus groups suggests that research into childcare providers is very focused on the specific type of childcare that a family requires, for example many parents who use English or Bilingual provision spoke of not being sure if there was Welsh language provision simply because they hadn’t looked.

Age Range of Children Using / Not Using Childcare

During focus groups, it became apparent that the use of childcare is connected to children starting school, *“I’m pregnant and I’m waiting till he / she is 3 years and in school before I think of going back to work. I don’t want the stress of finding money for childcare while working and raising my family”, “I can’t wait until she starts school it will cut our childcare bill dramatically and we’ll have a small amount of flexible income again.”* This is supported by the questionnaire data for example 74% of non-users have children who are at school, whilst among current childcare users 44% of usage is for children aged 2 and under illustrating that Childcare needs are driven significantly by those parents whose children are not old enough to be in school, reflecting the demand patterns we highlighted in the very first part of this section.

In those families where childcare is being used for some and not all of the children, those children not in childcare tend to be either at school or old enough to care for themselves. Among non-users 15% of families say it is because their child / children are old enough to look after themselves. In addition, among older children (over 12 years of age) participation in extra circular activities and the child’s preference for visiting friends etc was seen as a reason not to use childcare. Of those who agree with the statement that “childcare is not available for the age range of their child” 21% had children over 12 years of age.

Reasons for Using / Not Using Childcare

It is important to acknowledge that the majority of parents we engaged with (including 56% of questionnaire respondents) are not currently, and not planning to, using formal childcare. Of those not using childcare 47% of respondents don't do so, in part, because they don't want to. The main drivers for this is either a parent deciding they wish to stay at home and look after the children themselves either because of parental choice, *"why would I have a child and pay someone else to raise her, she's my responsibility"* or because returning to work is not seen as being financially worth-while. In addition, there is a preference for informal childcare provided by family and friends who are considered to be more trustworthy and flexible than formal childcare provision. It is also important to acknowledge the perception of childcare as expensive among non-users, especially when compared to family and friends who essentially provide free childcare *"for my sanity I want to work and it's only because of my strong family network that I can afford to."*

Of those using formal childcare, 73% do so because they go to work. At focus groups, a number of parents spoke of the benefits they saw from their child being in childcare but despite this the majority would stop using it if they didn't have to work. A number of parents and carers spoke of a desire to spend time with their children, *"I want to raise my child"*, and for many work and the resulting need for childcare was a barrier to this. In contrast, some parents spoke of wanting to work for themselves and balance this with raising their children.

Flying Start and Early Years Education were seen as a reason to use childcare because they provide the social and learning benefits of childcare without the barrier of cost implications and a number of families are only using childcare because they are eligible for these programmes. Whilst this benefits a significant number of families in Merthyr Tydfil it is seen as a reason for not using childcare among some families *"why should I pay for something I would get for free if I lived in another postcode"* *"I don't understand why I am not allowed to use Flying Start, the roads next to me are in Flying Start but I'm not. How is that fair?"*

Accessibility / Availability and Affordability of Childcare Provision

Responses to the questionnaire show that both use and non-usage of childcare is spread across the 11 geographical wards which make up Merthyr Tydfil. 91% of childcare used in term time is within Merthyr Tydfil, decreasing to 81% during summer holidays. 49% of respondents agree there is a good choice of childcare in their local area and 74% agree that childcare is well located. In discussions with parents, people spoke of a preference for childcare near home, but a willingness to travel for the right provider *"I've made a decision to travel so I can find good childcare, and the development is amazing."* Accessibility was more of an issue among parents and carers who don't have access to a car, with a number explaining that public transport was a barrier to them using childcare. Among those who rely on public transport there was a preference for childcare provision in the town centre *"it would be easier if there was something in the town centre all buses go there"*.

The vast majority of those looking for childcare have been able to secure a place at their preferred choice, with the exception being parents who were looking for a place at the college either because they had heard about its reputation or to support them in education or training. In addition, the town centre location of the college makes it appealing to those families who rely on public transport.

There is a growing demand for provision that starts earlier and ends later, with more parents looking for childcare before 8am and after 6pm and finding their options limited. Needing childcare outside the time it is perceived to be available is often a reason for parents preferring to use grandparents, family and friends. In addition, those who work shifts find childcare providers lack of flexibility an issue *“I’ve found childcare (childminder) in the right location for me, but my shifts change every week so I have to pay for 5 days a week but will only use 3.”* The use of childcare reduces during school holidays in part because of a perceived lack of availability *“I work part time and while my son is at school (aged 9) I don’t need childcare. But during the holidays I have to use all my annual leave to look after him, I can’t afford to pay someone to look after him”.*

73% of parents using childcare agree it is too expensive, of which 47% earn more than £30,000 per annum. Throughout the focus group process childcare was described as in affordable and expensive, specifically in relation to family’s incomes. Parents often spoke of not wanting to work just to afford childcare.

Our consultation and engagement with parents and carers, including those who do and don’t use childcare, has highlighted the following key strengths and weaknesses in the current childcare market from their perspective it will be reflected further in our gaps analysis later in this document:

Strengths

- The majority of parents and carers with children without specialist/additional needs believe there is a variety of childcare options to choose from in terms of type of provision and location and they welcome the mix of provision available to them, most particularly in term time. However, there are challenges for some groups around access to provision for Children with ALN and those parents seeking Welsh Language provision particularly during the school holidays.
- Connections and partnership working between childcare provision and community programmes such as Communities First, for example a number of families using Communities First funded Parent and Toddlers groups turn to the Communities First teams for advice and support in relation to finding and using childcare.

- Those using childcare perceive it to be of a high quality and parents are seeing the benefits at home and in school. 92% of parents are satisfied with the quality of the childcare they receive in term time. Parents and carers speaking of significant improvements to children's language, social skills and confidence which they attribute to childcare.
- Those parents who looking for Welsh language provision considered the Meithrin to be a strength of the sector.

Weaknesses

- A growing number of parents are looking for childcare that reflects their working hours this includes those who are looking for provision that starts earlier and ends later, as well as those looking for more flexible provision that will respond to shift work. Parents are frustrated by the concept of having to pay for a space they are not using in order to retain that provision for when they need it. There is a belief that current provision is too focused on school and working hours, and that childcare *"hasn't changed with the working world."*
- Accessibility to childcare is more challenging for those who rely on public transport, with parents being put off by difficult and time-consuming journeys which result in childcare not meeting their needs.
- Perceived limited / lack of provision for older children particularly during school holidays. Whilst some parents feel their child *"old enough to look after himself for an hour or two after school"* they don't feel *"he is ready to be left for the whole day."* Parents of older children are conscious that their children *"don't want to be in with the babies"* and are looking for provision that is more suitable and / or relying on extra curriculum activities during term time and family and friends all year round.
- Childcare is considered to be expensive and this is seen as a considerable weakness by parents and carers. The desire to use, or use more childcare is often mitigated by the costs. 45% of parents think their childcare could be improved, during term time, by making it more affordable compared to 18% who felt no improvements are required.
- The perception that for some groups, families of children with additional needs and / or a disability and those seeking Welsh language childcare, there are limited options.
- Childcare and the use of childcare is consistently associated with work, or free provision such as Flying Start, with the benefits to their children and family being seen as an addition rather as the primary reason to use childcare.

6.4. Barriers to Childcare Provision

6.4.1. Accessibility of Childcare Provision

Stakeholders involved either in the direct delivery of Childcare Services, their overall management and development, or in ensuring access to Childcare for parents those individuals were working with were also consulted. This involved 35 interviews with these Stakeholders.

Stakeholder interviews confirmed that the following issues remain in Merthyr some of which remain in line with the findings of the 2014 CSA

- The particular challenge is to persuade Merthyr parents of the value of childcare and the fact that affordable provision is available even though many parents report already using a mixed range of provision mixing their use between informal Childcare from friends and family with more formal support from a range of Childcare providers including Nurseries, Childminders, After School Care during Term Time and supplemented by Holiday Schemes during school holidays.
- A strong reliance on friends and family to provide informal childcare because this often offers a flexibility of provision not always found in more formal provision.
- Cost remains an issue for some, although there is a concern this is based on a perception of a lack of availability rather than an understanding of the full range of Childcare options that might be available across the County Borough.
- Variance in the quality of childcare provision available across the county borough has narrowed driven particularly by the development of Flying Start delivery which has raised the overall quality of provision across Merthyr.
- There remains an over reliance on new resources (staff/funding) rather than looking at developing existing staff resources or facilities at settings to help to improve quality.
- Delivering non-contact time for staff is a significant challenge for some settings so they are able to plan and review their existing activities and identify alternative delivery arrangements.
- Support and development infrastructure is still needed, particularly across a range of settings run by volunteers though there is acknowledgement of the need to move towards more sustainable forms of development so settings become less reliant upon support provided through local authority routes.
- Training participation remains a challenge for some staff
- Many families face challenges in identifying affordable childcare options for their children and often do not pursue second or third choices after finding their main/first choice is unavailable. Further support may be warranted for some groups to enable them to look at a wider range of childcare options that may still be affordable for them.

- Lack of business skills and full cost recovery can be problematic for some childcare providers, particularly for Play Groups/those run by volunteer committees.
- Recruiting and retaining voluntary management committee members can be problematic and also ensuring they have the right skills to employ staff, remain financially viable and deliver a regulated childcare service
- A mixed economy approach remains the preferred supply option within Merthyr.

6.4.2. *Barriers experienced by specific target groups*

In addressing these barriers below the CSA should seek to make this work the cornerstone of its delivery against the local delivery against the local Wellbeing Delivery Goals and specifically the local Merthyr Wellbeing goal which the Childcare sector will play a particular lead role in - Children get the best start to life - as detailed in Section 3 above.

(i) Working Parents

For working parents, as with most groups, a fundamental barrier is affordability. Parents are looking for childcare they can realistically afford, “not cheap but value for money” and the cost of childcare is often evaluated against one or both parent’s salary. The cost of childcare is having an influence on the wider decisions families make, specifically among those just about managing.

46% of parents who used childcare and agree that childcare is too expensive earn over £30,000, this may in part because these parents are not benefiting from childcare tax credits and schemes such as Flying Start. A number of working parents fear that increased childcare costs and / or the increased cost of living could force them to give up work. Among working parents there is a perception that childcare is something they need to use rather than want to use and this affects how they use and think of the provision.

There is a belief that childcare providers should be more considerate of working parents and provide work friendly opening hours. Those who work variable shifts believe it is more challenging to find childcare and are critical of the lack of flexibility among providers, there is a frustration at having to pay for childcare that is not required. This lack of flexibility among registered provision is often cited as a reason to use family and friends. Limited options for older children and during school holidays were also barriers to childcare among this group, with parents often using annual leave to fill the gap.

(ii) Parents seeking work or training opportunities

It should be acknowledged that affordability was a barrier across all the groups we engaged, including parents seeking work or training. Those in training did receive an element of support from training providers such as colleges; those parents who were considering returning to college were often frustrated by the waiting list at the on-site provision and reluctant to use an alternative.

The role of the Job Centre was highlighted among the group and there was a feeling that the Job Centre is poorly informed in relation to childcare and the options available. Use of childcare among this group is limited to Flying Start and Early Years Education unless the parent is in training or starting work.

Family and friends were considered a better option as this group requires flexibility in provision for example to attend an interview or work on assignment, which isn't considered to be available from registered childcare. A number of parents were looking for the "ideal job" which work around their child's schooling and reducing the need for, and therefore cost of childcare.

The 30 hours offer was greeted with limited enthusiasm with parents of children outside the age range expressing annoyance that they will not receive any support.

(iii) Unemployed Households

As previously discussed there is a clear relationship between childcare and employment status, so the use of registered provision within this group mainly comes through Flying Start. Those unemployed parents who don't live in a Flying Start postcode feel they are being "punished" and express a preference for "means testing over postcodes." In some ways, this is becoming a barrier to unemployed non Flying Start parents who express the opinion "why should I pay for something I would get for free if I lived in another postcode."

Among this group childcare is perceived to be hard to find, lacking in flexibility and too expensive to make it worthwhile with parents consistently expressing that they didn't want to work "just to pay for childcare". Families without access to a car also saw poor public transport and childcare being located in hard to reach places as a barrier to accessing provision.

(iv) Low income families

There was a preference for using family within this group for a range of reasons including trust, cost and flexibility. A number of parents in low income families work shifts, zero hours contracts or have short term employment (it should be noted that at the time the consultation took place a number of parents were in temporary employment over the festive period) and feel that childcare is not flexible enough to allow them to use it when they need it.

There was also considerable confusion about the childcare element of working tax credit and how their eligibility changes in relation to their employment, stories of tax credits having to be paid back were also a barrier to this group. As with unemployed households those who rely on public transport saw this as a barrier to accessing childcare provision.

(vi) Families from ethnic minority backgrounds

Numbers were low and there were families from ethnic minority groups represented in other targeted groups. We did engage with a small sample of families from migrant communities (Polish, Czech and Filipino) who expressed a limited awareness of childcare provision and opportunities in the area. In the main they raised similar concerns to other parents focussed upon the cost of childcare, the need for more flexibility in its availability, and the challenge of managing informal childcare arrangements.

Specific to this group were some issues around community language support for the Polish, and Portuguese populations and there was a belief that the language barrier might be an issue, “my little boy is still learning English, it might be too much for him. I don’t feel comfortable with it myself yet.” These families spoke of using family networks within their community and did not know where to start in relation to finding childcare. One Polish mother also raised the question “would we be welcome?”

(vii) Families with children who have special educational needs, or a disability

Families in this group find it hard to find childcare because they have to be convinced that the provider can answer the question “can you understand and meet my child’s needs” and “can they do as good a job as I can?” Discussion with parents suggests there is an extra layer of reassurance required among this group and they are more reliant on a personal recommendation which limits their options and therefore they don’t feel they have much choice.

This position mirrors some of the things that were raised during our stakeholder interviews that highlighted that if children with additional needs require additional support to access a childcare setting, through a one to one worker, the cost often has to be met by childcare providers, who often struggle to remain sustainable anyway, or the child is unable to attend. Parents identified that they felt that local authority cutbacks have seen provision for children with additional needs, particularly transport arrangements reduced over the last few years.

(viii) Any other specific target groups relevant to the Local Authority area

Welsh Language

As with the other groups cost and affordability is a barrier to using and using more childcare provision. Lack of Welsh language options was seen as a barrier, and there was a preference for one good high quality Welsh language setting with parents acknowledging that they would be willing to travel to.

There was also a belief that not enough childcare staff could speak Welsh and this was a barrier to them being able to find provision. The group expressed frustration at what they saw was the tokenistic use of Welsh in some settings they had been to previously, with settings claiming to be bilingual “but doing the bare minimum just nursery rhymes and colours in Welsh” and would like to see childcare linked with Welsh Language schools.

Despite having a preference for Welsh Language provision, parents within this group needing to use childcare in order to attend work meant that even in this group Welsh is a desirable, a high on the list desirable, as opposed to essential.

Parents are very supportive of the role of the LA-funded Welsh language officer and her role to undertake workshops and visit English medium settings. They would value more of an opportunity for the officer to have more direct dialogue with parents/carers to share with them the benefits of Welsh medium education. This is particularly important given the emphasis in the National Welsh Language Strategy (July 2017) on increasing the number of Welsh speakers and opportunities to speak Welsh to 2050³.

³ See a copy of the strategy at: <http://gov.wales/docs/dcells/publications/170711-welsh-language-strategy-eng.pdf>

7. Early Years Part Time Education (Foundation Phase) and Flying Start Provision

7.1. Analysis of Early Years Part Time Education (Foundation Phase)

We conducted interviews with 13 (of 23 Primary in Merthyr - 57%) Primary and Nursery Schools to collate an overview of Early Years provision in Schools across Merthyr Tydfil:

3 Year Olds for 2016/17 Nursery Entry - Consulted Schools

	Total	Full Time	Part Time
Admission Number	427	298	129
Applications	355	239	84
Number Admitted	388	225	149

Other key findings include that:

- Four schools have some limit on when 3 year-olds are able to start at Nursery School, and three of these schools reported challenges around starting school for some of their 3 year-olds in the last 12 months.
- Five schools offer a place in the term after their third birthday to all pupils - Bedlinog Community Primary, Cyfartha Primary, Gurnos Nursery, Pantysgallog Primary, and Troedyrhiw Community Primary. Two schools (St Aloysius RC, and Trelewis Primary) only offer entry in September.
- Four schools would like to change their admission numbers for 3 year-olds in the next three years - the schools are - St Aloysius RC, Dowlais Primary, Troedyrhiw, and Ysgol Gynradd Coed-Y-Dderwen.

4 Year Olds for 2016/17 Entry - Consulted Schools

	Total
Admission Number	388
Applications	302
Number Admitted	387

All children start Reception class in September of each year. Only one school reports challenges in accommodating 5 year-olds which relates to other nursery pupils applying for places at the school yet not attending the Nursery at the school.

Two schools report wanting to change their admission numbers for 4 year-olds in the next three years.

Nine schools have childcare operating from their school site - eight offer free breakfast clubs, three offers Flying Start and two offer after school childcare.

Only two schools say they have been approached by parents in the last 12 months about issues to do with childcare.

Three schools say they would have available space in which new childcare provision could be developed

Data for Academic Years 2015/16 and 2016/17 provided by the Schools Department supplemented data from the interviews conducted with Early Years settings. This highlights some key trends in allocations, and take up, of Early Years Education places across Schools in Merthyr Tydfil:

- Mid-year admissions and applications for places outside of September entry have been increasing in recent years as people have been moving into the Merthyr area this covers applications to join Nursery's as well as applications for Reception places. However, even after applications are made many parents often decide to not take up Nursery places offered, or seek alternative arrangements elsewhere.
- Allocations made for Nursery places in Easter 2017 have risen by around 10-20 places this year reflecting an influx of young families moving into the area and continued birth rate levels in Merthyr.

- There was also an increase in the number of children taking up Reception places in September 2016 which was a further increase on the number of children admitted to Nursery in the previous academic year. A further illustration of the in-year movement of children into Merthyr Tydfil.
- House building proposals for Merthyr Tydfil suggest that these pressures are likely to increase as the nature of the housing planned is likely to be most suitable for young families. Between 2011 and 2017 the completions have been concentrated in the most populous wards of Cyfartha and Town, but there has been significant house building activity in Bedlinog an area which with Merthyr Vale is expected to be the location of the largest number of anticipated completions between 2018 and 2022 and this may offset a little the falling birth rate and projected declines in the 0-3 year-old population.
- Numbers of applications received for Easter 2017 are substantially up on last year and the number of applications is around 20-30 children higher than available places.

Further School Admissions data is awaited from Methyr Tydfil County Borough Council.

7.2 Summary of key strengths and weaknesses

- Emerging patterns show that there is strong demand for mid-year places at Nursery and Reception level due to significant increase in the numbers of families moving into Merthyr after the start of each academic year with 144 places made available for Easter entry in 2016/17 according to data from the Education Department. The schools involved included Caedraw, Cyfarthfa Park, Edwardsville, Gurnos Nursery, Troedyrhiw, and Ynysowen Primary Schools.
- Additional space in schools for other Childcare facilities is extremely limited only three schools (Pantysgallog Primary; Troedyrhiw and Bedlinog) have highlighted they would have available space to accommodate such facilities in the future.

7.3. Analysis of Flying Start Provision

Flying Start Entitlement

- Of those respondents who are eligible for Flying Start free childcare provision, in 2016-2017, 94% of all eligible children offered a place are taking up the provision, so where there is availability, levels of take-up exceed those in the general population.

- Of the 6% not taking up the provision 25% felt their child / children would not benefit, other respondents failed to state why they were not taking up the provision.
- It should also be noted 9% of those who stated they didn't use any formal childcare, do access childcare through Flying Start.

Figures from the Flying Start team for 16-17 show that of 357 eligible children across Merthyr 9% were not taking up their entitlement the main reasons for this non-take up were Transition/Health Visitors unable to make contact with parents; parents were accessing childcare out of county; some returned to their country of origin for an extended holiday; or childcare was declined but no reason was given.

85% of all early years' providers (excluding childminders) across Merthyr are funded to provide Flying Start places offering 213 spaces utilised by 324 children across Merthyr.

The Flying Start offer is concentrated in the most deprived areas in Merthyr as shown in **Table 7.1** below:

Table 7.1: Areas Covered by the Flying Start Offer

LSOA Names	Area/Ward
Bedlinog 2	Trelewis
Cyfarthfa 1	Twyncarmel
Cyfarthfa 2	Gellideg
Cyfarthfa 3	Heolgerrig/Ynysfach
Dowlais 1 & 4	Dowlais & Dowlais/Pant
Gurnos 1,2,3	Gurnos
Merthyr Vale 1 & 2	Merthyr Vale/Aberfan
Penydarren 1 & 2	Galon Uchaf & Penydarren
Plymouth 1	Pentrebach/Troedyrhiw/Abercanaid
Treharris 3	Treharris

A key issue highlighted by the Parents Survey is the ongoing concern about access to Childcare provision after children have completed their free childcare entitlement up to their third birthday and the potential for a gap between this and their take up of a statutory school place in the term after their third birthday. Using data supplied by the Flying Start team we have been able to identify using their birth dates the numbers of children that will require admission into school midyear from flying start areas. These figures are summarised in **Table 7.2** which shows that assuming only a September start in each academic year is available then between 100 and 130 children could face up to an 8 month wait between the completion of their free Flying Start childcare and a September start at school, whilst between 70 and 100 could face a 5 month wait for the same reason. With Flying Start only available to 41% of the boroughs 0-4 population then the demand for midyear admission points in schools can be estimated to be at least double that of Flying Start

A key issue highlighted by the Parents Survey is the ongoing concern about access to Childcare provision after children have completed their free childcare entitlement up to their third birthday and the gap between this and their take up of a statutory school place in the term after their third birthday. Using data supplied by the Flying Start team we have been able to identify the potential numbers of children this may affect given the birth dates of the cohort of children. These figures are summarised in **Table 7.2** which shows that assuming a September start in each academic year then between 100 and 130 children could face up to an 8 month wait between the completion of their free Flying Start childcare and a September start at school, whilst between 70 and 100 could face a 5 month wait for the same reason.

Table 7.2: Potential Wait to Start School Following End of Flying Start Childcare Entitlement

Academic Year Start Nursery	Total Number of Children	Number with 5 month wait	%	Number with 8 month wait	%	Mean Wait in Months
15/16	186	71	38.2	0	0.0	2.5
16/17	344	80	23.3	127	36.9	4.5
17/18	375	97	25.9	108	28.8	4.1
18/19	405	99	24.4	136	33.6	4.3
19/20	315	79	25.1	103	32.7	4.3
20/21	183*	54	29.5	107	58.5	6.3

Source: Flying Start Anonymised Administrative Record 2012 - 2017. Wait times have been calculated between the term in which a child is no longer eligible for Flying Start Childcare and the time to a September start in School. * This figure is lower as not all the children it covers have been born at the time the data was collected.

7.4. Summary of key strengths and weaknesses

Flying Start has acted as a key driver for the overall increase in quality noted in CSA interviews with Childcare stakeholders across Merthyr Tydfil.

Take up of places is consistently high, and the funding for these places is helping support overall provision across the County Borough.

However, parent/carer focus groups identify that there remain concerns from those living outside the Flying Start areas that they are missing out on free childcare because of a 'postcode lottery'. Until Welsh Government policy is altered this concern is likely to remain.

Flying Start has proved to be a positive feature of Childcare delivery in Merthyr Tydfil and take up rates suggest that some positive steps are being made on changing the culture around the lack of use of formal childcare provision in the county borough.

The key challenge will be to continue the development of Flying Start Childcare to facilitate more widespread improvements in Childcare supply in Merthyr Tydfil, particularly helping to underpin the maintenance of the availability of high quality Childcare in the area.

8 Free Breakfast Club Provision

All Primary Schools in Merthyr Tydfil offer a Free Breakfast Club facility in line with Welsh Government requirements to provide all learners at maintained nursery/primary schools with the opportunity of receiving a free, healthy breakfast at school each day. The Schools Forum in Merthyr consulted on reducing the time the Breakfast Clubs are available for from a 40-50minute period prior to the school day starting to operate 30 minutes before the school day starts in November and December 2016. The consultation resulted in no change in plans for Breakfast Club provision in the 2017/18 academic year, though there may be a further consultation on change to take effect in 2018/19, though these plans are yet to be confirmed.

Details of existing Free Breakfast Club provision are identified below, although details on the number of places are not held centrally. Research in 2016 by Kellogg's for the Department of Education estimated that on average a Breakfast Club has 35 users⁴.

⁴ http://www.kelloggs.co.uk/content/dam/newton/images/masterbrand/UK/R5_Kelloggs%20Breakfast%20Club%20Audit%20APSE.pdf

8.1. Analysis of Free Breakfast Club Provision

Area	Name of Schools	Places Available
Bedlinog	Bedlinog Community Primary School - Breakfast Club	Not kept centrally
Town	Caedraw Primary School - Breakfast Club	
Park	Cyfarthfa Park Primary School - Breakfast Club	
Dowlais	Dowlais Primary School - Breakfast Club	
Treharris	Edwardsville Primary School - Breakfast Club	
Penydarren	Gellifaelog Primary School - Breakfast Club	
Gurnos	Goetre Primary School - Breakfast Club	
Plymouth	Greenfield Special School - Breakfast Club	
Gurnos	Gurnos Nursery School - Breakfast Club	
Penydarren	Gwaunfarren Primary School - Breakfast Club	
Cyfarthfa	Heolgerrig Community School - Breakfast Club	
Dowlais	Pantysgallog Primary School - Breakfast Club	
Gurnos	St Aloysius RC Primary School Breakfast Club	
Dowlais	St Illtyds RC Primary School Breakfast Club	
Town	St Marys' R C Primary School Breakfast Club	
Bedlinog	Trelewis Primary School Breakfast Club	
Plymouth	Troedyrhiw Primary School Breakfast Club	
Town	Twynnyrodyn Community Primary School - Breakfast Club	
Merthyr Vale	Ynysowen Community Primary School- Breakfast Club	
Cyfarthfa	Ysgol Gynradd Coed Y Dderwen - Breakfast Club	
Treharris	Ysgol Gynradd Gymraeg Rhyd Y Grug - Breakfast Club	
Town	Ysgol Gynradd Gymraeg Santes Tudful - Breakfast Club	
Vaynor	Ysgol Y Graig Primary School - Breakfast Club	

9. Working Tax Credit/ Universal Credit and Employer Supported Childcare/ Tax Free Childcare

9.1. Analysis of Working Tax Credit/ Universal Credit and Employer Supported Childcare/ Tax Free Childcare

Amongst Parents/Carers as identified by the questionnaire survey:

Working Tax / Universal Credit Utilisation

- 72% of respondents do not claim the childcare element of working tax credit, 30% of non-claimants know that they are not eligible and 22% do not pay for the childcare they use. 6% did not know about the element. 57% do not intend to claim in the future and of those who do claim 50% use childminders. There are no comparable national figures.
- 90% do not claim tax free childcare, or receive assistance through an employer support scheme.
- 75% do not intend to claim in the future and 18% are unsure.
- 69% of those who don't claim were unsure about eligibility.

Working and Child Tax Record

The latest data for 2013/14 shows that there were 5,700 families in and out of work in Merthyr Tydfil receiving Working Tax Credits (WTC) and/or Child Tax Credits (CTC). 2,200 families in work with children were in receipt of WTC and CTC; 900 in work families with children were in receipt of just CTC; and within these figures there were 1,600 lone parent families in work in receipt of WTC and/or CTC. On average, all in work families were in receipt of £5971 per annum though this rises to an average of £8227 per annum for in work families in receipt of WTC and CTC. In Merthyr, the average weekly value of the childcare element of WTC is £58.27 per week above the average in Wales of £52.90.

Overall, the 2013/14, figures show that there were 3,600 children in 2,200 out of work families, and 5,200 children in 3,100 in in-work families.

Universal Credit Utilisation

Numbers of people on Universal Credit remain low as the transfer of benefit arrangements continues to proceed. The latest DWP figures show that there were 436 people in receipt of Universal Credit in Merthyr in December 2016 and 439 in January 2017.

30 Hours

- 41% are aware of the proposed offer of 30 hours a week of free early years education and childcare for working parents of 3 and 4 year-olds. Just over half (51%) would be eligible for this now or in the future and 55% of those eligible would take up the offer. Of those who declined it was mainly on the grounds that their child would already be in pre-school and / or that they were not in employment.
- 60% felt it would make childcare more affordable and 47% felt it would encourage parents and carers to stay in and / or return to work.

In June 2017, Carl Sargeant, the Cabinet Secretary for Communities and Children made a statement⁵ identifying that:

- In Wales, the 30 hour offer is being piloted from September 2017 in seven local authority districts Gwynedd, Anglesey, Flintshire, Swansea, Blaenau Gwent, Caerphilly and Rhondda Cynon Taf with wider roll out across Wales after the testing has taken place.
- That they were seeking to set a fair funding rate, reflecting the current market and seeking to maximise the number of childcare places available, and that the rate set was £4.50 per hour across all seven early implementer authorities which will only cover childcare.
- An independent economic review of the childcare sector in Wales has been commissioned seeking to quantify the economic impact of the childcare sector and provide detailed breakdowns of the costs and charges required for childcare providers to operate efficiently and sustainably. This will also help inform the funding rate in the longer term.
- That early Implementer authorities already have arrangements in place to deliver early education to all 3 and 4 year-olds and there will be opportunities to test the alignment of the two elements which make up the 30 hours in the pilot areas, and that a detailed evaluation will be conducted across the seven early implementer authorities to identify the key components of the future roll out of the policy.

⁵ See <http://gov.wales/about/cabinet/cabinetstatements/2017/childcareofferwales/?lang=en> for the full detail of the statement

Table 9.1 below illustrates our estimates of the potential take up of the 30 hour offer based on data collated by this review. This suggests that around 290 - 300 additional children may be engaged by the 30 hour offer.

Table 9.1: Estimate of Likely Take Up of 30 Hour Offer by Ward

	Bedlinog	Cyfartha	Dowlais	Gurnos	Merthyr Vale	Park	Penydarren	Plymouth	Town	Treharris	Vaynor	Merthyr Total
Number 3-4 year-olds in 2015	87	224	147	185	106	90	158	123	177	146	56	1,499
Number 3-4 year-olds already in Childcare	20	70	14	28	33	0	25	81	19	45	6	341
Balance of 3-4 year-olds	67	154	133	157	73	90	133	42	158	101	50	1,158
Number likely to be living in Employed Households (46% based on 2016 ONS statistics for Merthyr)	31	71	61	72	34	41	61	19	73	46	23	533
Number Likely to be Engaged by Offer (56% in Parent Survey)	17	40	34	40	19	23	34	11	41	26	13	298

Employer Supported Schemes

Our survey of 37 employers (who cover a range of sectors including retail and wholesale, manufacturing, the public sector, other services, and hotels and catering) across Merthyr employing 1,175 staff suggests that on average around 60% of these staff (700) have children aged under 14.

- 97% offer part time working
- 86% offer voluntary reduced working hours
- 70% phased return to work
- 68% offer mini jobs (less than 10 hrs per week)
- 57% offer temporarily reduced hours
- 46% offer term time / school hours working
- 43% offer flexi-time

78% of employers say that childcare has NOT been a factor in preventing an employee taking up employment or continuing to work in their organisation, for 6 employers it has been an issue.

76% of employers say more affordable childcare would improve the offer in the borough, 54% available at different times particularly before and after school, and 41% more flexible sessions.

35% provide childcare vouchers; 41% provide information about working tax credits, 30% information about childcare provision. On site provision of childcare is limited to one or two employers.

Employers generally very positive about the impact of the Welsh Government 30 Hour offer.

9.2. Summary of key strengths and weaknesses on Employer Supported Childcare and Tax Credits

- Understanding of WTC and CTC has improved from the previous CSA survey results although there are a significant number of parents who remain unsure about the specific details of what the credits can and cannot cover. There are concerns about the forms that need to be completed to claim the credits.

- The use of significant amounts of informal childcare in Merthyr probably reduce current demand for CTC because those providers are not eligible in CTC terms.
- Providers report that the use of childcare vouchers via employers is a significant part of paid childcare and they expect the demand to grow further for this kind of support.
- Only very few employers currently report that they have seen difficulties arise for their staff from any lack of availability of childcare, although employers do perceive childcare to be expensive in Merthyr, yet current provision appears to adequately support existing employers needs.
- There is significant lack of clarity amongst Parents and Carers about the detail of the future 30 hour offer and its implications for parents. This is understandable given that there is as yet no agreement on the model of delivery that will be adopted, and that the early adopters will not start delivery until September 2017. Once identified Parents will require further information before committing further to engagement with the programme, but a majority of parents do believe it will make Childcare more affordable in Merthyr Tydfil a long-standing issue for many in the county borough.

10. Sustainability

Clybiau Plant Cymru Kids' Clubs, Mudiad Meithrin and Wales Pre-school Providers Association working in partnership through an umbrella contract arrangement with Merthyr Tydfil County Borough Council support the early years and childcare sector. The contract is worth £55,000 per annum and employs staff for 60.5 hours a week.

Organisation	Staff Hours a week	Staff Hours a Year (52 weeks)
Clybiau Plant Cymru Kids' Club Childcare Business Development Officer	18.5	962
Wales PPA Development Officer	30	1,560
Mudiad Meithrin Support Officer	12	624

Through this contract Childcare settings in Merthyr have been supported in the following ways, though it is important to note that ongoing budget reductions will place particular pressures on this work moving forwards:

- All Early Years and Childcare providers receiving specialist advice and guidance at least once a term.
- Support for all Childcare providers to remain open and sustain CSSIW registration.
- Work using Business Assessment Tools to support all voluntary run Childcare providers.
- Work to support delivery of an annual satisfaction survey
- The maintenance/achievement of the Healthy Snack Award, the use of the Child Development Profile and Foundation Phase profile and the sharing of data with the Early Years and Flying Start teams.
- Visits to all Pre-School settings to support Welsh Language activities.
- Support for all settings in the Healthy and Sustainable Pre-School Scheme.

In addition, £72,307 from Welsh Government and an additional £9,564 (specifically used for used on L3 Transition to Playwork, quality workshop and quality assurance scheme) have been used under the Out of School Childcare Grant arrangements to provide:

- A Childcare and Play Development Officer to provide business and quality support to Out of School Clubs
- An ICC Support worker supporting access to the sensory room.
- A marketing campaign to improve the take up of Childcare across the county borough.
- Assisted Places activities supporting 21 children to attend places.
- Start Up/Incentive grants for a range of open access play and outdoor activities.
- An environmental play workshop to be delivered in March 2017.
- Range of other projects under development including cooking sessions, Playwork qualifications and Mini Mover support for Out of School Care.

11. Cross Border

In term time 91% of childcare is being taken up in Merthyr Tydfil, with 8% being accessed outside of the Borough in Caerphilly, Cardiff and RCT. During school holidays, out of area use increased to 17%, partly reflecting the lower availability of places in school holidays in Merthyr Tydfil. Those using provision outside Merthyr Tydfil primarily use Day Nurseries located in Caerphilly, Cardiff, and RCT. This is also likely to be linked to the relatively low levels of car and van ownership in Merthyr as shown by the 2011 Census (see **Section 4** on Poverty).

12. Workforce Development

The Childcare Sufficiency Assessment includes an assessment of existing childcare workforce qualifications and training needs across the childcare types, as a means of informing the local authority's workforce development and training programme. Consideration has been given to the training requirements in respect of the National Minimum Standards for Regulated Childcare (NMS) <http://gov.wales/topics/health/publications/socialcare/guidance1/regulatedchildcare/?lang=en>) and the CSSIW standards at <http://cssiw.org.uk/docs/cssiw/publications/160303regchildcareen.pdf> and more generally, to raise the quality of childcare provision on offer to children.

Data on 195 staff working across 46 (of 56 registered settings - 82%) settings was analysed. This analysis highlighted the following key features:

- 67% of staff were qualified to Level 3 with 15% qualified at Level 5.
- Overall. 89% of staff hold a Level 3 or above qualification.
- Full Day Care and Sessional Day Care staff are the best qualified of all Childcare staff. 74% of Full Day Care staff hold a level 3 qualification with 12% with a Level 5 qualification, with 91% qualified at Level 3 or above. 60% of Sessional Day Care staff hold a Level 3 qualification, whilst 24% have a Level 5, 90% hold a Level 3 or above qualification.
- Out of School care staff are the least well qualified with 33% holding a Level 2 qualification, and 33% holding a Level 3 qualification. No staff in this sector qualifications above Level 3.
- Existing training activity leading to accredited qualifications is limited. 62% of all Childcare staff are not currently working towards a qualification, and this rises to 65% of all staff in Full Day Care settings.
- The least well qualified staff are also the least likely to be doing training for a qualification with all staff currently in Out of School settings not working towards any form of qualification.
- Childminders show the greatest training activity with 24% working towards a Level 5 qualification compared with 13% across all staff providing workforce data.

13. Results of Consultation with Stakeholders (as outlined in section 2)

Stakeholder identified that generally there has been little move/change from issues reported in 2014 and they highlighted the following key issues:

- Lack of flexibility to the changing working circumstance of people is an issue so offer outside traditional 9-5 offer needs to be looked at
- Concern remains about gap between leaving Flying Start and entering school and ready availability of places at this time.
- Work underway to tackle the need for marketing messages for parents about availability but a big challenge in this a tackling long held culture that 'family and friends is best' and cheaper too.
- Flying Start developments have helped improve provider quality standards and developments have improved the availability of overall quality across Merthyr.
- Positive signs about the transition information now shared with schools both in its consistency and use by the receiving schools.
- Some settings not supported by Flying Start are showing financial strains - Tiny Treasures closed Friday 6th Jan 2017.
- The 30 hours Offer has lots of confusing messages about how it is going to be arranged, funded and supported and concern this may swallow up existing provision for those in employment reducing options for the unemployed outside Flying Start areas. Settings want to be clear if money will come direct to them as have problems with fee payment for those receiving tax credits not paying their fees. Will the 30 hour offer support wraparound care - this is likely to be of most use for working parents.
- Specialist ALN support is very limited, particularly for one to one support, outside Flying Start settings because additional funding is there.
- Status of childcare is low amongst other professions in statutory organisations. Know of examples where childcare workers are not invited to case conferences even though they may have the best knowledge and experience of the child in question.
- Delivering non-contact time for staff remains a big challenge for many settings. Staff work long hours and commit to training during the evenings and weekends and some staff don't get paid for this time. Also, they have their own lives and families and so even if the commitment is there to do the training sometimes they are just unable to attend. It boils down to funding, if a setting had funding to send staff on training then more would attend and we would have more highly skilled staff.
- More support needed to provide business skills development across the sector, though this is a particular challenge in play group sector.
- Concern about the loss of childminders in Merthyr, potential to lose more in the future as well as retirement approaches. There is a need to refresh the provider base here as a key component of maintaining a flexible Childcare offer, specifically supporting atypical hours. .

14. Gap Analysis & Areas for Improvement

Our analysis of available information suggests that the following gaps and areas for improvement are relevant for consideration by MTCBC for some form of remedial action:

Table 14.1 summaries key gaps and areas for development consideration:

Table 14.1: Supply and Demand Assessment for Childcare in Merthyr Tydfil

	Bedlinog	Cyfartha	Dowlais	Gurnos	Merthyr Vale	Park	Penydarren	Plymouth	Town	Treharris	Vaynor
Total Number of Under 4 Year Olds	35	220	84	99	66	0	70	204	58	117	14
Number of Childcare Spaces Provided	40	179	53	138	100	0	67	225	70	116	66
Number of Children Utilising Spaces (Term Time)	35	295	94	126	95	0	76	238	82	179	14

	Bedlinog	Cyfartha	Dowlais	Gurnos	Merthyr Vale	Park	Penydarren	Plymouth	Town	Treharris	Vaynor
Largest Existing Childcare Provision (Term Time)	Pre-School Playgroups 40 spaces, 110 spaces in total.	72 spaces in Day Nursery's, 249 spaces in total.	37 spaces in Pre-School Playgroups, 158 places in total.	48 spaces in Day Nurseries, 243 spaces in total.	52 spaces in Day Nursery's, 135 spaces in total.	None	50 spaces in Pre-School Playgroups, 137 spaces in total.	92 spaces in Day Nurseries, 295 spaces in total	49 spaces in Day Nurseries, 210 spaces in total.	43 spaces in After School Clubs, 186 spaces in total.	24 spaces in Cylch Meithrin, 101 spaces in total.
Key Gaps in Supply	No After School provision, no Childminders, Day Nurseries.	None	No After School provision	No childminders	No childminders	No Childcare provision located in the ward.	No After School provision, no holiday childcare	None	No holiday childcare	None	No Day Nursery
Numbers of Children in Nursery 2016	44	29	45	15	78	57	68	43	149	47	29

	Bedlinog	Cyfartha	Dowlais	Gurnos	Merthyr Vale	Park	Penydarren	Plymouth	Town	Treharris	Vaynor
Numbers of Children in Reception 2016	40	35	50	98	69	42	55	58	155	44	22
Housebuilding 2011 -2017	196	213	80	42	18	57	32	39	196	61	32
Proposed Housebuilding 2018 - 2022	127	46	0	0	130	20	0	50	205	9	2

	Bedlinog	Cyfartha	Dowlais	Gurnos	Merthyr Vale	Park	Penydarren	Plymouth	Town	Treharris	Vaynor
Overall Commentary	Substantial house building pressures ongoing to 2022, 60% of term time provision not available in School Holidays, no After School provision located in the ward.	Substantial house building pressure, location of Cylch Meithrin provision,	No After School provision	Key provider in Merthyr, though no Childminders in the ward	No Childminders with future substantial house building expected to 2022.	No Childcare provision	75% of Term Time spaces are not available during school holidays, no After School Club provision.	Location of Welsh Language provision, and key hub of all provision in Merthyr.	Substantial ongoing house building pressures, no Holiday Care and Childminding services.	Location of Cylch Meithrin provision, no substantive gaps at present.	Location of Cylch Meithrin provision, but no Day Nursery provision outside of Welsh Language provision.

In addition to the specific contained in the Table above, we also identify the following areas for consideration arising from our review of the evidence contained in this report.

Term Time

- Provision outside regular office hours particularly those offering Childcare before 8am and after 6pm where available places drop by 67 and 99% respectively. Around 10-15% of parents in the survey identified a specific wish for availability at this time which will mean that additional spaces at these times will not need to be increased dramatically, but may warrant some pilot to work to identify whether there may be further emerging demand. This should be coupled with a wider investigation of how greater flexibility might be incorporated into all Childcare provision so that emerging new forms of working involving less traditional working hours are better reflected in the offers that settings in Merthyr are able to put to parents/carers.

- Existing Welsh Language and Bilingual provision in Term Time are already operating at close to, or in line with capacity and there is potential to look at identifying options for further provision in Welsh Language provision as the ongoing marketing campaign and work of the authority funded Welsh Language officer continues to have effect on take up of Welsh language/bilingual provision. Notwithstanding this general review it would be pertinent to investigate how any new options would address parental wishes for greater flexibility in the availability of provision, including in Welsh Language and Bilingual settings.

School Holidays

- There is currently no Welsh Language provision available during School Holidays in Merthyr Tydfil and bilingual provision is already at capacity.
- A further area of concern involves the roll out of the Welsh Government's proposal of free 30 hours of childcare for all 3-4 year-olds with working parents. Our calculations (see **Section 9 Table 9.1**) suggest that between 290-300 new children may be involved in the free childcare places. There are significant caveats to be aware of driven particularly by an assumption that all existing Childcare providers would be prepared themselves to take up the offer. Early evidence from England suggests this may not be the case with up to two thirds of councils in England highlighting that at least some of their Childcare providers will not be taking up this offer. It is perhaps pertinent for MTCBC to keep the plans of settings to participate in the 30 hour under detailed review, so that early warnings can be identified and alternative provision identified.

15. Childcare Sufficiency Assessment – Action Plan

Issue	Proposed Response	Timing	Measures
<p>Maintain ongoing Early Years and Childcare sector support to continue the development and sustainment of settings to retain 100% of existing provision.</p>	<ul style="list-style-type: none"> • Continue existing umbrella support arrangements with a specific focus upon the sustainable development of high quality childcare provision. • Support Voluntary managed providers to ensure sound governance arrangements and financial planning • Encourage and support existing provision to develop their offer and broaden their customer base in order to meet gaps in service delivery and identify alternative more flexible forms of childcare provision. • Encourage and support existing provision to work with staff to identify opportunities for them to complete formal qualifications at Level 3 and above levels, especially in the Out of School Care settings wherever possible. 	<p>Annually with a review in Jan-Feb each year to 2022 to facilitate annual planning.</p>	<ul style="list-style-type: none"> • All Childcare providers receive support on workforce development and sustainable development. • All training providers have at least some staff who have attended training provision provided through the Early Years and Childcare Workforce development programme delivered via the training programme hosted at the ICC, Pentrebach. • All voluntary managed providers have undergone the Business Assessment Tool and a business plan and financial planning in place • All voluntary managed providers have appropriate Governance arrangements.

Issue	Proposed Response	Timing	Measures
ALN	<ul style="list-style-type: none"> • Provide staff training to enable existing and new providers to offer childcare places for children with disabilities. • Encourage and support existing provision to develop their offer for children with disabilities. 	Annually with a review in Jan-Feb each year to 2022 to identify where further developments and support might be needed.	<ul style="list-style-type: none"> • All Childcare providers receive support on working with children with disabilities and their parents/carers. • All training providers have at least some staff who have attended training provision provided through the Early Years and Childcare Workforce development programme on supporting children with disabilities and their parents.

Issue	Proposed Response	Timing	Measures
<p>Recent loss of childminders and length of time others have worked for – 3 of existing cohort working for over 15 years and 6 10 -14 years. Seven childminders with 47 spaces deregistered in early 2017.</p>	<ul style="list-style-type: none"> • Continue existing childminder recruitment campaign. • Work with Employability programmes to identify potential childminders and wider recruits for sector. 	<p>From April 2017.</p>	<ul style="list-style-type: none"> • Recruit at least 2 childminders in 2017/18, with further 2 in 2018/19. • Identify at least 5 beneficiaries via employment programmes suitable for work in Childcare sector in Merthyr.
<p>Limited After 6pm provision including recent loss of provision, and parental demands for greater flexibility of provision to mirror emerging work patterns.</p>	<ul style="list-style-type: none"> • Development work with existing providers to identify options for later opening and options for more flexible use of childcare in line with needs of parents working non-traditional hours. 	<p>From April 2017 with further review in early 2018.</p>	<ul style="list-style-type: none"> • Identify at least 2 providers to pilot later opening and monitor initial take up of places provided
<p>Existing Welsh Language provision is currently full to capacity and there is no Welsh Language School Holiday provision in the county borough.</p>	<ul style="list-style-type: none"> • Development work with existing providers to identify options for later opening, and identification of School Holiday options. • Continued support through the local authority funded Welsh Language officer including contact with Parent/Carer forums to share benefits of Welsh Language Education. 	<p>Annually with a review in Jan-Feb each year to 2022 to identify where further developments and support might be needed.</p>	<ul style="list-style-type: none"> • Identify at least 2 Welsh Language providers to review options for additional spaces and options for paid Welsh Language School Holiday provision.

Issue	Proposed Response	Timing	Measures
Continued perception of lack of relevance and affordability of childcare offer in Merthyr.	<ul style="list-style-type: none"> Continue existing childcare marketing campaign profiling research backed benefits of attendance and range of costed options available. 	From April 2017. Review ongoing need for marketing in Feb/Mar 2018.	<ul style="list-style-type: none"> Increase in inquiry levels through FIS Increase in take up monitored annual via the SASS.
Low profile and poorer understanding of nature of Welsh language childcare provision amongst some parent/carer groups.	<ul style="list-style-type: none"> Work with Welsh Language providers and commissioned partners to identify additional marketing opportunities for Welsh Language opportunities. Utilise expertise of the Welsh Language Officer to share more detailed examples of benefits of Welsh Language provision direct with parents in Merthyr Tydfil. 	From April 2017 with further review in late 2017.	<ul style="list-style-type: none"> Identify at least 2 providers to work with to identify key components of a marketing approach to link into wider childcare marketing.

Issue	Proposed Response	Timing	Measures
Reduction in out of school provision supported by Communities First.	<ul style="list-style-type: none"> • Work with Communities First for early identification of provision and its capacity likely to close and timing of this. 	From April 2017.	<ul style="list-style-type: none"> • Details collated of closures and continuations identified. • Plan drafted to address gaps arising.
Lack of parent/carer understanding of tax credits options and availability.	<ul style="list-style-type: none"> • Identify further information for inclusion on the FIS website in liaison with Voluntary Action Merthyr Tydfil and possible easy read brochure 	From June 2017 with further review in late 2017.	<ul style="list-style-type: none"> • Content identified for website inclusion. • Costed plan for brochure production for distribution to providers.
Lack of clarity on future 30-hour offer – providers and parents/carers.	<ul style="list-style-type: none"> • Liaise with Welsh Government and Childcare Network to collate information as it emerges. • Work through provider networks to brief providers AND assess likely levels of take up. • Review information available of FIS website and potential marketing/brochure options • Work in partnership with education to consider demand and supply issues and the impact of the gap in provision 	From April 2017.	<ul style="list-style-type: none"> • Details collated of options when made available. • Provider briefings held. • Marketing materials developed for parents/carers. • Seamless access to early years education place and care

Issue	Proposed Response	Timing	Measures
<p>Challenge of completing CSSIW SASS and its alignment with future FIS arrangements.</p>	<ul style="list-style-type: none"> • Provide further updates and CPD for providers and encourage all Childcare providers to complete a SASS return. • Work with FIS to identify options for direct link between new Capita system and SASS data to facilitate active use by local authority. 	<p>April – June 2017.</p>	<ul style="list-style-type: none"> • At least 2 SASS briefings held including options for supported completion as part of potential workshop approach. • Formal liaison with FIS and Capita on incorporation of SASS data into FIS system.