Annual Early Years Sector Profile Report
2019 / 2020

Minister's Foreword

As Minister for Children, Equality, Disability, Integration and Youth I am very pleased to publish the 2019/20 Annual Early Years Sector Profile Report. The survey, which is administered by Pobal on behalf of my Department, has captured crucial data on the Early Learning and Care and School-Age Childcare sector for the past 18 years, and continues to form a key input into policy development and reform in my Department.

Undoubtedly, 2020 marked one of the most difficult years we have collectively faced. In line with public health advice, COVID-19 resulted in the closure of Early Learning and Care and School-Age Childcare services across the country between March and June. This was enormously challenging for services, staff, parents and children. The period of closures also underscored the importance of the Early Learning and Care and School-Age Childcare sector to the economic and social fabric of Irish society. Children and families greatly missed services when they couldn't attend, and services missed children and families. When the sector began to re-open from June onwards, the dedication and resilience of the early years workforce and sector was really evident as services went to great lengths to support children's return in as safe a way as possible.

As Minister, I recognise and applaud the leadership shown by services and staff in the context of COVID-19, putting children and their families at the heart of their work, and I offer my thanks for this commitment during difficult times.

Notwithstanding the impact of COVID-19, I am also struck by the positive developments across the sector and through the data evidenced in this report, demonstrating our shared commitment to ensure high-quality, accessible, affordable and inclusive Early Learning and Care and School-Age Childcare for all children and families.

State investment in the sector has increased by an unprecedented 141% over the past five budgets, supporting increased access and affordability for more children and families than ever before. Significant resourcing has been made available to services at different stages throughout the pandemic to ensure that restrictions and new ways of operating didn't compromise services' sustainability or result in increased costs to parents.

This report reveals another year-on-year increase in the number of children with additional needs receiving support under the Access and Inclusion Model. The continued progress towards a highly qualified workforce is also very positive, with a significant increase in the number of staff qualified to Level 7 or higher.

Reflecting on this report, I am struck by what we have collectively achieved and continue to achieve. I would like to take this opportunity thank each and every person who took the time out of their busy schedules to complete this survey. The commitment to complete the survey in such a challenging set of circumstances demonstrates a sector-wide recognition of the importance of research and evidence for policy-making.

I would also like to thank the City and County Childcare Committees and Voluntary Childcare Organisations for their continued support in promoting this survey among their networks and memberships.

The 2019/20 programme year began with the launch of the National Childcare Scheme in November 2019. This scheme marked a major policy development, putting parental entitlement to subsidised childcare on a statutory footing for the first time. As we move forward, a range of significant policy initiatives will continue to develop and strengthen the sector. Work is ongoing on a number of major reform projects including the design of a New Funding Model, a Review of the Operating System and a Workforce Development Plan. A National Action Plan for Childminding was recently launched.

Addressing Early Learning and Care and School-Age Childcare affordability, accessibility and quality are key priorities for the Department of Children, Equality, Disability, Integration and Youth and this Annual Early Years Sector Profile once again provides critical, timely data to support this work.

Minister Roderic O'Gorman,
T.D.

Message from the CEO

For the last 18 years, Pobal has been collecting important information about the Early Learning and Care (ELC) and School-Aged Childcare (SAC) sector in Ireland through the Annual Early Years Service Profile. I am delighted to present to you the Annual Early Years Sector Profile Report for 2019/20.

Every year, the information and analysis included in this report is used to plan for the delivery of accessible and quality early learning and care to all children in Ireland. Over the past year, this data has become even more important in helping the Department of Children, Equality, Disability, Integration and Youth (DCEDIY) to plan their response to the COVID-19 emergency and deliver measures to mitigate its impact on the sector. Pobal is very proud to have been able to work with the DCEDIY on this effort to support the frontline providers of those essential services.

The 2019/20 programme year began with the launch of the eagerly awaited National Childcare Scheme (NCS) in November 2019. This scheme marked a significant development in the sector, putting parental entitlement to subsidised childcare on a statutory footing for the first time. Since launch, uptake of the scheme has been high, with subsidies paid for almost 50,000 children during the scheme's first year.

Then of course, came the unforeseeable events in March 2020, which saw the immediate closure of services across the country. This period of closure reinforced just how central Early Learning and Care and School-Aged Childcare settings, and the professionals who run them, are to the economic and social fabric of Irish society. The events of 2020 clearly demonstrated the professionalism, dedication and resilience of Ireland's Early Learning and Care and School-Aged Childcare sector.

I am very grateful to all services who participated in the survey last year and I would like to thank each and every person who took time out of their busy schedules to complete this voluntary survey. It is a testament to the sector that even during such a challenging set of circumstances as was experienced during the reopening of the sector last year, the majority of Early Learning and Care and School-Age Childcare settings prioritised the completion of this survey. This clearly illustrates a sector which recognises the importance of research and evidence, which in turn, are key enablers of data driven policy.

I would like to also thank the teams who administered this year's survey, analysed the data and produced this report. I am also grateful to our colleagues across the sector for their support, especially the City and County Childcare Committees (CCCs) and Voluntary Childcare Organisations (VCOs).

Lastly, I would like to extend my thanks to the Department of Children, Equality, Disability, Integration and Youth (DCEDIY) and Minister Roderic O'Gorman TD for their continued partnership with Pobal, and their commitment to the evidence which underpins policy and programme development. The team at Pobal is proud to work alongside them as they work to continuously build and further develop high-quality and inclusive childcare in Ireland.

Anna Shakespeare
Chief Executive Officer

Glossary of terms

ACS	Affordable Childcare Scheme
AIM	Access and Inclusion Model
ASCC	After-school Childcare Programme
ASD	Autism Spectrum Disorder
CCC	City and/or County Childcare Committee
CCS	Community Childcare Subvention
CCSP	Community Childcare Subvention Plus
CCSR	Community Childcare Subvention Resettlement
CCSRT	Community Childcare Subvention Resettlement (Transitional)
CCSR(T)	Jointly refers to CCSR and CCSRT
CCSU	Community Childcare Subvention Universal
CE	Community Employment
CEC	Community Employment Childcare
CEC(AS)	Community Employment Childcare (After-School)
CEC(PS)	Community Employment Childcare (Pre-School)
CETS	Childcare Education and Training Support Programme
CSO	Central Statistics Office
CSP	Community Service Programme
DCEDIY	Department of Children, Equality, Disability, Integration and Youth
DEASP	Department of Social Protection
ECI	Early Childhood Ireland
ECCE	Early Childhood Care and Education Programme
ED	Electoral Division
ETB	Education and Training Board
ELC	Early Learning and Care
ELCC	Early Learning and Care Capital
EWSS	Employment Wage Subsidy Scheme
EYP	Early Years Platform
EYSPR	Early Years Sector Profile Report
EYEPU	Early Years Education Policy Unit
HR	Human Resources
HSE	Health Service Executive
JI	Job Initiative Scheme
LINC	Leadership for Inclusion in the Early Years
NCS	National Childcare Scheme
NFQ	National Framework of Qualifications
PIP	Programmes Implementation Platform
PSP	Programme Support Payment
SAC	School-Age Childcare
SACC	School-Age Childcare Capital
TEC	Training and Employment Childcare
TWSCS	Temporary Wage Subsidy Childcare Scheme
VCO	Voluntary Childcare Organisation

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Executive summary

Overview and context

This report provides an overview of the Early Learning Care (ELC) and School-Age Childcare (SAC) sector in Ireland for the programme year 2019/20. It outlines the findings and analyses data captured from two sources: the Annual Early Years' Service Profile survey, completed by 65% of ELC and SAC services (2,964) in June 2020, as well as Pobal's administrative IT platforms (the Programmes Implementation Platform (PIP) and the newly launched Early Years Platform (EYP)).

Like many areas of society, the 2019/20 programme year for the ELC and SAC sector was characterised by the disruptive effect of the COVID-19 pandemic. With ELC/SAC services forced to close from the 12th March 2020, the context in which providers completed this survey was very different to anything previously experienced by the sector. The survey itself was conducted between the 15th and 26th June 2020, a time when many service providers, who were closed for over three months, were preparing for, and beginning the first steps of phased re-opening. While this posed a number of challenges, there was also a greater than usual need for up-to-date information about the sector to inform the policy response to this crisis. In balancing these considerations, a shorter, stripped back survey was developed and administered.

Given these surveys were completed during a period of phased reopening, respondents were asked to complete the survey based on child numbers as they would have been prior to the nationwide closure announced in March 2020. During the analysis of survey responses, it was identified that in some cases data in respect of enrolments, vacancies and waiting lists had been interpreted differently by survey respondents. Although thorough analysis was undertaken, it was not possible to identify which responses were comparable in order to build a national picture. Rather than provide potentially inaccurate information on these measures, this year's sector profile report does not include information on these metrics.

Programme enrolment and ELC and SAC services

During the 2019/20 programme year (19th August 2019 – 14th August 2020) a **total of 180,149 children were enrolled on at least one Government subsidy programme**. For the first time since 2016/17 the total number of children availing of the DCEDIY programme has decreased, by 3% on the previous year, when the figure had stood at 185,971. The decrease reflects the reduced population numbers in the relevant age groups.

In 2019/20 programme year, a total of **105,975 children benefited from the Early Childhood Care and Education (ECCE) scheme**, representing a small decrease on the previous year of 2%. However, the total value of approved ECCE contracts in 2019/20 (€229,409,347), has decreased by 22% on the previous year. This significant decrease is a direct result of the suspension of the ECCE scheme in April 2020 due to COVID-19.

The National Childcare Scheme (NCS) opened for applications in November 2019. This new scheme marks a significant development for the ELC and SAC sector, representing the first statutory entitlement to financial support for ELC and SAC. Between the launch of the scheme and up to the 24th August 2020, the end of the first programme year, a total of 53,513 children from 42,557 households received subsidies under the NCS.

In 2019/20, 3,180 services were contracted to offer the Community Childcare Subvention Plus (CCSP) Programme, representing a 1% decrease on the previous year. In 2019/20, 38,790 children benefited from CCSP, a decrease of 15% on the previous year when 45,594 children were supported under CCS/CCSP. An additional 24,409 children availed of the universal subsidy (CCSU[1]), 28% less than in 2018/19. These reductions are due to a combination of factors – the introduction of the NCS in November 2019[2] as well as some children availing of CCSP in previous years no longer qualifying or requiring support. The total value of approved CCSP contracts in 2019/20 was €94,732,642, **a reduction of 30% since 2018/19.**

The participation rates in TEC has been declining year on year since 2015/16 and this trend has continued in 2019/20, when **2,218 children participated in Training and Employment Childcare (TEC) programmes**, representing a 36% decline in the numbers of children compared to the 2018/19 programme year. The total value of approved TEC contracts in 2019/20 was €4,965,254, a 42% decline on the previous year.

There was **a total of 4,690 services in operation during the year** who were contracted to provide at least one of the four DCEDIY funding programmes. This is a 2% increase (92 more services) compared with the previous year. The composition of services has remained unchanged at 26% community and 74% private over the last 12 months.

When analysed geographically, community services are more likely to be located in disadvantaged communities, with private providers more likely to be situated in affluent areas.

Commercial rates are payable by services that are not ECCE-only or community services. One-quarter of services (25%), who responded to the service profile survey, were charged commercial rates in 2019/20. This is a decrease of 6% on the 2018/19 figure of 31% and is potentially a result of rates being waived during COVID-19 closures. The average rate these services were billed was **€4,546.**

Inclusion and disability

The number of services that reported having at least one Traveller child attending was 547, or 18% of all services. This represents a 1% increase on the 2018/2019 figure. Meanwhile, 9% of respondents reported having at least one Roma child attending, a 2% increase on the previous year.

Almost three quarters of services (74%) provided care to children with additional needs and 61% had at least one child with a diagnosed disability, an increase on the 2018/19 figure of 54%.

In 2019/20, 2,428 services were supported under the Access and Inclusion Model, in respect of 5,708 children. Relative to the previous year, there was a 1.7% increase in the number of services receiving support under AIM and an increase of 3.5% in the number of children (5,513) receiving targeted supports.

Fees

The average **weekly fee** reported was **€186.12** (an increase of €1.76 or <1% on last year's figures) per child for a **full day** place, **€110.75** (an increase of €0.77 or <1%) for **part-time** and **€73.90** (a €0.60 increase or <1%) **for sessional**. This continues a trend of modest but continued annual fee increases which have been seen across the sector since 2015.

The cost of ELC and SAC is associated with factors such as the age of the child (being most expensive for children up to 1 year due to smaller child/adult ratios), as well as the location of the service. Fees remain highest in urban areas, affluent areas, and along the eastern coast.

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1   CCSU was introduced in September 2017 and made available to parents who were not eligible for subsidies under CCS/CCSP or TEC for children up to 3 years old.

2   No new applicants were able to join CCSP after 16th November 2020.

Dublin - Dún Laoghhaire-Rathdown remains the most expensive local authority area in the country for ELC and SAC, with an average weekly cost of €239.84 for a full-time place. **Monaghan has become the least expensive** county in the country for full time care, at €150.46.

Staff

It is estimated that **30,883 staff work in the Early Learning and Care and School-Age Childcare sector**, of whom 26,294 (85%) work directly with children. **This represents a slight increase of 0.3% on the previous year for numbers of staff working directly with children.**

As in 2018/19, nearly all staff working in private services were directly employed (99%), relative to 83% of those working in community settings. The remainder of staff working in the community services are employed through various employment schemes/other Government-funded programmes.

The majority of staff (55%) have worked in their current service for four years or less, while 65% of staff worked five years or more in the ELC and SAC sector. This suggests significant levels of inter-service mobility within the sector.

Staff qualifications

The vast majority of staff working directly with children (94%) have qualifications at NFQ Level 5 or higher and over two thirds (69%) have qualifications at NFQ Level 6 or higher. The proportion of staff with NFQ Level 7 qualifications and above increased significantly, by 9%, since 2015/16 – with 27% of staff working directly with children now holding a qualification at NFQ Level 7 or higher. The proportion of staff with no qualification relevant to the ELC and SAC sector is 5%, a decrease of 1% on the previous year. 2,311 staff were reported to be in the process of attaining a qualification, of whom 82% were studying at NFQ Level 6 or higher.

Staff wages and turnover

The average hourly wage of childcare staff (excluding managers) is €12.45. The average hourly wage in 2018/19 calculated using the same methodology as in 2019/20 was €11.99. This represents an increase of 4% on the previous year. The average rate for early years assistants (both ECCE and non-ECCE), who make up 55% of all childcare staff (excluding managers), is €11.91 per hour. ECCE room leaders are, on average, paid the highest hourly rate at €13.69 per hour, while relief staff and early years assistants (non-ECCE) earn the least (€11.58 and €11.51, respectively).

Wages differ notably at the county level, with average hourly rates ranging from €11.49 in Monaghan to €13.48 in Dublin City.

Salaries for managerial staff average at €15.28 an hour and an average annual salary is €31,898.

The average hourly wage for ancillary staff is €12.34 with those in administrative/clerical positions generally earning the highest hourly wage (€13.77) within this cohort.

The annual **staff turnover rate is 18%**, which is down from 23% the previous year. Additionally, 5% more services retained all their staff (64%) compared to 2018/19. Staff turnover rates differ across counties, from 11% in Roscommon to 38% in Dún Laoghaire-Rathdown.

Services reported that 31% of staff who left the service in the previous twelve months had an NFQ Level 7 qualification or above.

Under a quarter of services reported having a staff vacancy (16%), representing a 7% decrease on last year's figure. The highest share of vacancies (40%) was for staff qualified to NFQ Level 5. 44% of services reported difficulties in recruiting staff over the past 12 months, which is 9% less than in 2018/19.

This report covers a challenging period for the ELC and SAC sector but also demonstrates its resilience and continued development.

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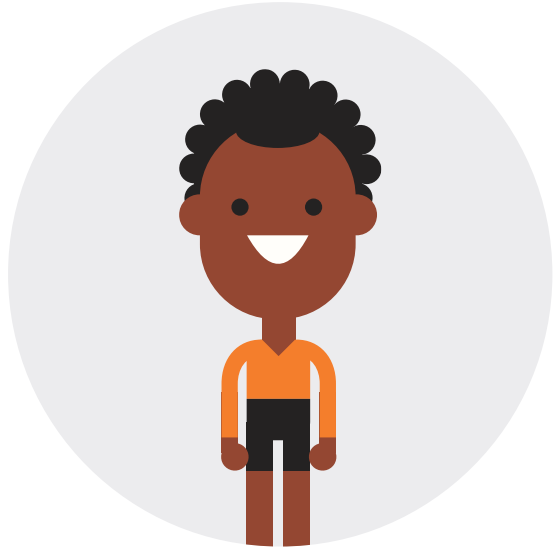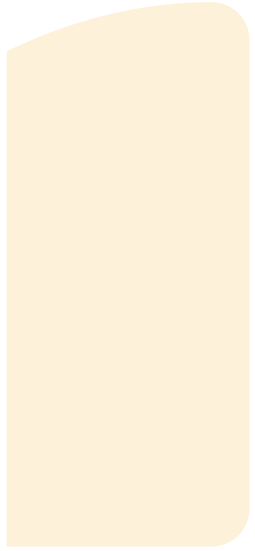
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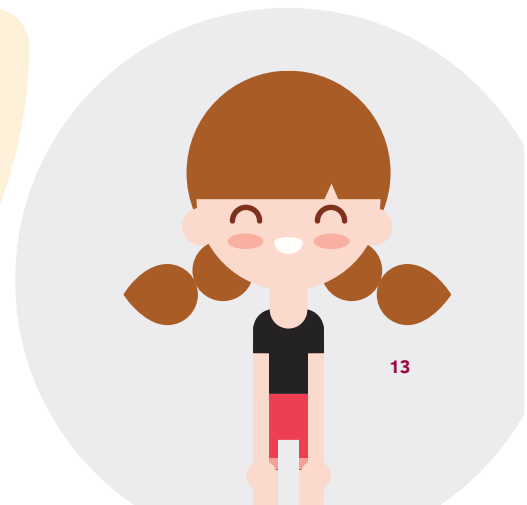
1.1   Introduction

The Annual Early Years Sector Profile report provides an overview of the Irish Early Learning and Care (ELC) and School-Age Childcare (SAC) sector for the 2019/20 programme year. Pobal has published the annual Service Profile survey of the sector (previously called the Annual Beneficiary Questionnaire and Annual Sector Survey) for the past eighteen years, providing data and analysis needed to support evidence-based policy and planning for the sector. Data from this survey has been integrated with information held about services on the Programmes Implementation Platform (PIP) and the Early Years Platform (EYP).

The report is structured around the key issues relevant to the ELC and SAC sector, such as ELC/SAC fees, staff wages, staff qualifications, and staff turnover. This year's report does not include the data on capacity within the sector, which has been an essential part of past reports. For the explanation of this omission please see section 1.3 on methodology. The report includes the following chapters:

Chapter 1 summarises any relevant policy, funding or other developments for the ELC/SAC sector in the 2019/20 programme year and outlines the methodology used for data collection and analysis.

Chapter 2 provides an overview of ELC/SAC programmes offered in the 2019/20 programme year – Early Childhood Care and Education (ECCE), National Childcare Scheme (NCS), Community Childcare Subvention Plus (CCSP) and Training and Employment Childcare (TEC) – including statistics on the number of services participating, the number of registrations and the total funding received by providers for the delivery of these programmes. It also outlines key statistics on supports provided under the Access and Inclusion Model (AIM) and funding under the COVID-19 Capital Grant and Reopening Support Payment.

Chapter 3 analyses ELC and SAC services regarding their type, geographical location, types of care provided, commercial rates, opening hours, and a number of other characteristics.

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

Chapter 5 presents a breakdown of ELC/SAC fees by the type of care offered, geographical location, organisation type, deprivation score and staff qualifications. It also includes information on school-age childcare fees, both in term and out of term.

Chapter 6 summarises information about the staff working in ELC and SAC services, including managers, those working directly with children and ancillary members of staff. It provides analysis of staff profiles, their qualifications, and wages, as well as staff turnover.

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

1.2.1 Policy frameworks

The main policy framework guiding the development of the ELC and SAC sector is *First 5: A Whole-of-Government Strategy for Babies, Young Children and their Families*, published in November 2018. This ten-year, whole-of-government plan focuses specifically on the first five years of a child's life and contains targets to improve the systems and supports available to babies, young children and their families. **The First 5 Implementation Plan 2019-2021** was published in May 2019. The **First 5 Big Steps** outlined in the strategy are as follows:

› A broader range of options for parents to balance working and caring;

› A new model of parenting support;

› New developments in child health, including a dedicated child health workforce;

› Reform of the Early Learning and Care (ELC) system, including a new funding model;

› A package of measures to tackle early childhood poverty.

1.2.2 COVID-19

The COVID-19 global health emergency created a series of challenges for the ELC/SAC sector in 2020. Following the Government-instructed closure of ELC/SAC services in mid-March, DCEDIY[3] ELC/SAC subsidies continued on an emergency basis before being replaced with new financial measures. These measures were introduced to support services, staff, parents and children.

In accordance with the Government Roadmap for Reopening Society and Business and guided by the expert advice of the Health Protection Surveillance Centre, ELC/SAC services reopened on 29th June 2020. 1,700 services that ordinarily operate during the summer reopened during this period (94% of all full-year services). Almost all services (99%) reopened to operate for the new programme year from September[4]. Children were able to avail of supports under universal and targeted schemes from that date, provided that they met the eligibility criteria for the schemes.

1.2.2.1 Emergency measures

To support and sustain the ELC/SAC sector during the COVID-19 crisis, DCEDIY introduced a suite of emergency measures throughout 2020:

› **Temporary Wage Subsidy Childcare Scheme (TWSCS)** – the TWSCS was offered to ELC/SAC providers from 6th April until the start of the reopening phase on 29th June. In addition to the national revenue operated Temporary Wage Subsidy Scheme (TWSS), TWSCS funding was made available to providers to top-up the wage subsidy provided for ELC/SAC staff. TWSCS funding was also made available to cover any ongoing or non-deferrable operational costs for the period of the scheme, as well as consumables such as Personal Protective Equipment (PPE). In order to be eligible for the scheme, providers needed to be registered with Revenue for the TWSS, maintain their staff on payroll, and agree to not charge fees, deposits or voluntary contributions for the scheme period.

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3   The Department of Children and Youth Affair (DCYA) changed to the Department of Children, Equality, Disability, Integration and Youth (DCEDIY) in October 2020. This document refers to this government department as the Department of Children, Equality, Disability, Integration and Youth (DCEDIY) throughout.

4   On 20th August 2020, 1,593 services were open and had at least one child availing of supports under any of the DCEDIY schemes. In comparison, 1,460 services had at least one child registered on the same date in 2019.

> **Employment Wage Subsidy Scheme (EWSS)** – the EWSS was introduced on 1st August 2020 and replaced the TWSS, which ceased on 31st August 2020. EWSS is an economy-wide enterprise support for eligible businesses in respect of eligible employees. It provides a flat-rate subsidy to qualifying employers based on the numbers of paid and eligible employees on the employer's payroll. It charges a reduced rate of employer PRSI of 0.5% on wages paid which are eligible for the subsidy payment. ELC and SAC services registered with Tusla received a particular exemption from the EWSS, as they were not required to demonstrate the 30% reduction in turnover.

> **Reopening Support Grant** – a once-off reopening support grant (€18m) was offered to registered, centre-based services who reopened between June and September 2020. This was to assist ELC/SAC providers with operational costs incurred during reopening, including those related to staff resourcing and training, learning resources, or cleaning/hygiene consumables.

> **COVID-19 Capital Grant** – the COVID-19 Capital Grant was introduced on 10th June 2020 to facilitate the reopening of ELC/SAC services. The purpose of the funding package (€14.2m) was to contribute to the capital costs associated with reopening, and enable Tusla-registered providers to make modifications to their facilities and outdoor areas or purchase the necessary equipment to ensure compliance with the government's Public Health Advice and COVID-19 Infection Prevention and Control Guidance for childcare and school-age services.

> **Childminding Grant** – a once-off childminding grant (€375k) was made available to childminders on 19th June 2020 to assist them with additional reopening costs. A payment of €500 was offered per childminder, provided they were tax compliant and either registered with Tusla or notified to their City / County Childcare Committee (CCC).

1.2.3   National Childcare Scheme (NCS)

The National Childcare Scheme (NCS) opened for applications in November 2019. This new scheme marks a significant development for the Irish ELC/SAC sector, representing the first statutory entitlement to financial support for ELC/SAC services. Under NCS, pre-existing ELC/SAC support programmes are to be replaced by a progressive and equitable system of general and targeted subsidies for children up to the age of 15. The subsidy application process has also been redesigned and replaced with an innovative and user-friendly online system. The aims of the scheme are to improve children's outcomes, support lifelong learning, reduce child poverty and tangibly reduce the cost of quality ELC/SAC for thousands of families across Ireland.

There are three categories of subsidies families are eligible for under NCS:

> **Universal subsidies** for families with children under three years of age, or with children over three years who have not yet qualified for the Early Childhood Care and Education (ECCE) programme. The subsidy is paid at a rate of €0.50 per hour, up to a maximum of 45 hours per week, for each child[5].

> **Income assessed subsidies** for families with children aged between 24 weeks and 15 years. These means-tested subsidies are calculated based on the family's individual circumstances, including family income, the child's age and educational stage and the number of children in the family.

> Subsidies supported by a statutory body **(sponsor)** are available for families with high levels of need for whom ELC/SAC is required on child welfare or child protection grounds or for whom childcare is a necessary element of family support.

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5   At the start of the scheme, the maximum number of hours for a universal subsidy was 40 hours per week and it increased to 45 hours per week from September 2020.

The DCEDIY introduced a number of measures in 2019 to help families and providers transition to the National Childcare Scheme, including a €2m funding package for the NCS Transition Support Payment. This once-off payment was offered to ELC/SAC providers to assist with the costs and administrative requirements associated with transitioning to the new scheme and, in particular, the parallel requirements of legacy and NCS schemes in the first year. Other measures included a new designated Parent Support Centre for parents and guardians applying to the scheme and a full suite of training.

1.2.4   Capital funding 2020

The application process for the Early Years Capital Programme 2020 was due to close on 27th March but was suspended due to COVID-19. 268 applications were received prior to the suspension (announced 26th March), which would not have fully committed the total budget available under the programme (€7.2m).

The Early Years Capital Programme 2020 was repurposed into the €14.2m COVID-19 Capital Grant to support ELC/SAC services reopening under COVID-19 restrictions.

1.2.5   Programme Support Payment (PSP)

PSP recognises the additional time required of services, who participate in DCECIY-funded ELC and SAC programmes, to complete the administrative work associated with the schemes. The payment also recognises the time required to perform activities outside of contact time with children, such as preparing materials for early learning and care sessions and assisting parents in understanding how they might benefit from the various ELC/SAC schemes supported by the State. €19.4m in funding was allocated towards the PSP in the 2019/20 programme year. In acknowledgment of the increased administrative workload resulting from the NCS transition and Tusla re-registration process in 2020, an additional €7m PSP funding package was announced in December 2019.

In April 2020, to assist with any cash flow difficulties being experienced by services due to COVID-19, the DCEDIY released an advance payment of one-third of the Programme Support Payment (PSP) that services were scheduled to receive in June 2020.

1.3   Methodology

1.3.1   Data sources

The data analysed in this report has been extracted from three sources:

> Programmes Implementation Platform (PIP) – for ECCE, CCSP and TEC (Chapter 2, and sections 3.1, 3.2 and 3.3)

> Early Years Platform (EYP) – for NCS (Chapter 2, and sections 3.1, 3.2 and 3.3)

> Service profile survey – Sections 3.4 to 3.11, and Chapters 4 to 6.

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

1.3.1.1   Programmes Implementation Platform (PIP)

PIP is a live system that is used to administer DCEDIY funded programmes, such as ECCE, CCSP and TEC. The PIP system is being gradually replaced by the new system built to facilitate the administration of the National Childcare Scheme – the Early Years Platform.

The figures in Chapter 2 and 3 related to ECCE, CCSP, TEC and AIM were extracted from PIP in June 2020, however, they represent the number of services, registrations and children as of 12th March 2020 (the closure date of services due to COVID-19 emergency). Additional data was extracted in October 2020 to provide summary figures for the entire programme year 2019/20 – these are included in section 2.7.

1.3.1.2   Early Years Platfrom (EYP)

A new dedicated IT system, the Early Years Platform (EYP), was developed for the administration of the National Childcare Scheme. The system, which includes a parent portal and a service provider portal called Hive, was introduced in November 2019.

1.3.1.3   Service profile survey

A total of 4,540[6] services with an active contract for the 2019/20 school year were invited to complete the service profile survey. A link to the survey was posted on the PIP and EYP portals on 15th June 2020. Services had until 26th June 2020 to complete it, but this deadline was extended by two weeks to 10th July 2020. This was to allow more services time to complete the survey and to acknowledge the additional demands on services as they worked to reopen in late June. **A total of 2,964 services completed the service profile survey, giving a response rate of 65%.** Of those services, 30% were community and 70% were private, 38% were based in rural areas and 62% were based in urban areas.

The service profile survey covers the 2019/20 programme year period up to the Government-instructed closure of ELC/SAC services on 12th March 2020. As data collection took place while services were either closed or in the process of reopening, instructions were added throughout the survey to remind services that the data sought relates to the period just before the closures began on 12th March 2020.

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6   This figure differs from the total number of services who offered at least one DCEDIY programme presented in Chapter 3. This is because these figures were extracted at different times.

1.3.2   Data quality

The 2019/20 service profile was administered using a different online survey platform to previous years. While it was hoped this move would improve the data collection process and user experience, some technical issues occurred while the survey was live. This resulted in a higher degree of missing data relative to previous years. Extensive data cleaning and data validation checks were performed to ensure data used for analysis was as accurate as possible. This meant that a number of exclusions of data was made, both at service and question level.

Additionally, the validity checks performed on the capacity data (enrolments, vacant places and waiting lists) have shown significant data validity issues that could not have been addressed through data cleaning. It is likely that the quality of capacity data was impacted by the reference period, i.e. requirement to provide data as of 12th March at the time of services reopening. Consequently, the capacity data has been excluded from this report.

1.3.3   Extrapolation methodology

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

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

1.3.4   Statistical analysis

The analysis of quantitative data included first order statistical and multivariate analysis. At various stages of the first order analysis we used two types of averages: the mean and the median. Where the term average is used this implies the arithmetic mean and it will be explicitly stated when the median is used. Median is used in cases where the distribution of values is largely skewed on one side and, therefore, the mean does not represent the central tendency.

Various machine learning and statistical techniques to enhance multivariate analysis were used in our analysis. These techniques were applied to search for correlations and factors of influence on certain profile attributes beyond the first order analysis. In the case of fees and wages, regression tree modelling was used to identify the factors of influence on these attributes.

1.3.5   Urban/rural classification

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

1.3.6   Definition of county

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

1.3.7   Presentation of data and analysis

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

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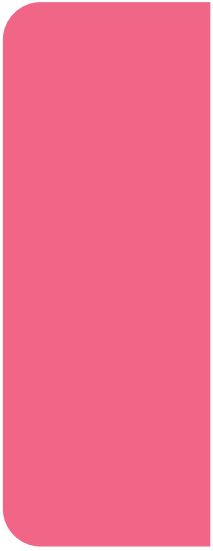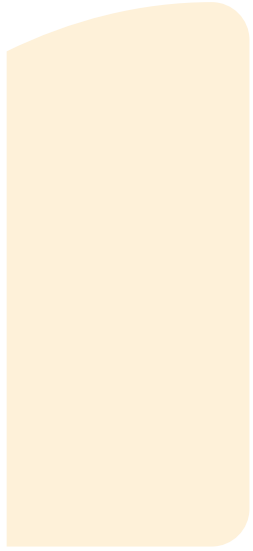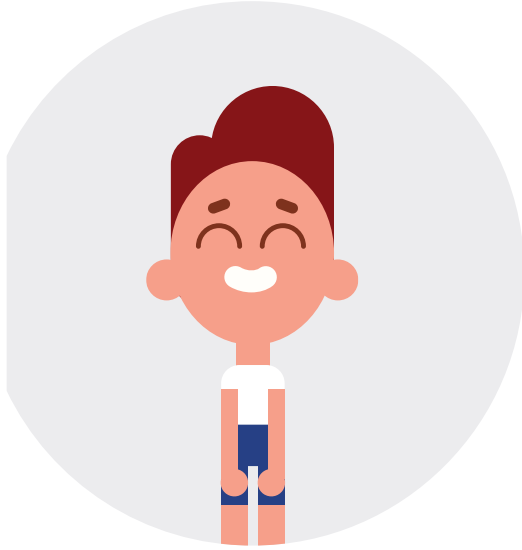
Overview of the Department of Children, Equality, Disability, Integration and Youth funding programmes
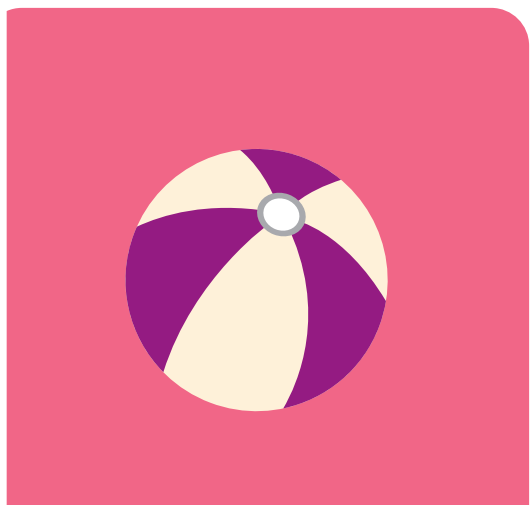
2.1   Introduction

The Department of Children, Equality, Disability, Integration and Youth (DCEDIY) leads the effort to improve the experiences and outcomes for children through investment in the Early Learning and Care (ELC) and School-Age Childcare (SAC) sector, via a number of funding programmes[7]. Pobal provides a range of services to and on behalf of DCEDIY in the areas of ELC and SAC, and manages the distribution of funds for the following programmes:

> Early Childhood Care and Education (ECCE)

> Access and Inclusion Model (AIM)

> Community Childcare Subvention Plus (CCSP)

> National Childcare Scheme (NCS)

> Training and Employment Childcare (TEC)

> Better Start

> Early Learning and Care and School-Age Childcare Capital Programmes (ELCC/SACC)

> Learner Fund

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

This chapter presents information and key trends for the following programmes: ECCE, NCS, CCSP and TEC, as well as providing a brief overview of the Capital programmes and AIM.

2.2   Early Childhood Care and Education (ECCE)

Early Childhood Care and Education (ECCE) is a universal programme available to all children within the eligible age range. In 2019/20, eligible children were aged between two years, eight months and five years, six months. It provides children with free access to an early learning and care programme prior to commencing primary school. The programme is provided for three hours per day, five days per week over 38 weeks per year, and the programme year runs from September to June. Children can avail of ECCE for up to two years. Similar to 2018/19, there was one point of entry to the programme year which ran from September 2019 to June 2020.

Services taking part in ECCE must provide an appropriate pre-school educational programme which adheres to the principles of Síolta, the national quality framework and Aistear, the national curriculum framework. Staff from local CCCs may also support ELC services with assistive visits and advice. The State pays a capitation fee to participating ELC services. In return, they provide a pre-school service free of charge to all children within the qualifying age range for a set number of hours and days over a set period of weeks. Details of services offering the ECCE programme can be viewed on Pobal Maps[8].

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7   Information on the various programmes is available on the DCEDIY website, at the following links: https://www.gov.ie/en/policy/e9b63e-children-and-youth/#childcare

8   Further information on Pobal Maps can be found at https://maps.pobal.ie/

In 2019/20, 4,398 services were contracted to offer the ECCE programme nationally, of which 76% (3,362) were private and 24% (1,036) were community. These are the same proportions as over the last three years.

Up to 12th March 2020[9], 105,975 children benefited from ECCE and there were 112,835 recorded registrations[10]. 60,549 (57%) children were attending their first year of ECCE with the remaining 45,426 (46%) attending for their second year.

The total number of children availing of ECCE decreased on the previous year by 2%. This corresponds with the decline in the number of ECCE eligible children nationally, of 3% due to the drop-in birth rates in recent years. The approximate number of eligible children for the 2019/20 programme call was 129,377 compared to 132,831 for 2018/19 the programme call.

As was the case in 2018/19, the majority of registrations (77%) were in private services. Table 2.1 provides a county level breakdown of ECCE registrations by type of provider. The geographical distribution of ECCE registrations is aligned to the population distribution. The differences in the proportions of registrations in community and private services at the county level are related to the different shares of community and private services at the county level.

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9   As services closed on 12th March 2020 due to COVID-19 pandemic, the number of children availing of the programme and the number of registrations include those between the start of the programme year and 12th March 2020.

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

Table 2.1 Number of ECCE registrations by county and organisation type 2019/20

County	Community	Community	Private	Private	Total
Carlow	457	37%	784	63%	1,241
Cavan	783	38%	1,253	62%	2,036
Clare	716	27%	1,964	73%	2,680
Cork City	1,063	40%	1,623	60%	2,686
Cork County	2,608	23%	8,616	77%	11,224
Donegal	1,535	42%	2,124	58%	3,659
Dublin – Dublin City	2,531	27%	6,853	73%	9,384
Dublin – Dún Laoghaire-Rathdown	525	11%	4,251	89%	4,776
Dublin – Fingal	446	6%	7,594	94%	8,040
Dublin – South Dublin	1,068	16%	5,763	84%	6,831
Galway	1,760	28%	4,511	72%	6,271
Kerry	1,359	43%	1,832	57%	3,191
Kildare	264	4%	5,811	96%	6,075
Kilkenny	506	23%	1,733	77%	2,239
Laois	400	18%	1,788	82%	2,188
Leitrim	457	57%	345	43%	802
Limerick	1,024	22%	3,590	78%	4,614
Longford	372	43%	499	57%	871
Louth	515	16%	2,615	84%	3,130
Mayo	1,114	38%	1,800	62%	2,914
Meath	606	11%	5,141	89%	5,747
Monaghan	717	50%	711	50%	1,428
Offaly	432	22%	1,524	78%	1,956
Roscommon	468	35%	860	65%	1,328
Sligo	485	36%	865	64%	1,350
Tipperary	967	26%	2,743	74%	3,710
Waterford	1,102	43%	1,435	57%	2,537
Westmeath	467	19%	1,999	81%	2,466
Wexford	1,207	33%	2,482	67%	3,689
Wicklow	380	10%	3,392	90%	3,772
Total	26,334	23%	86,501	77%	112,835

The total value of approved ECCE contracts in 2019/20[11] was €229,409,347 which represents a decrease of 22% (€65,219,939) from the previous year. This significant decrease is a direct result of the suspension of the ECCE scheme in April 2020 due to COVID-19 emergency.

11 The value of contracts was extracted from PIP in April 2021.

The higher capitation payment provides increased funding for ELC services who have an ECCE room leader who has a graduate qualification. A service that has an ECCE session that meets the following requirements is eligible to apply for ECCE Higher Capitation payments for that session based on the following criteria:

› A Room Leader with a qualification recognised as meeting the minimum requirements for ECCE Higher Capitation;

› The same Room Leader has a minimum of three years' paid experience working in the ELC/SAC sector;

› If the regulatory adult to child ratio is met;

› Room Assistant (if required for adult to child ratios), who holds a full and relevant qualification that meets the minimum regulatory standards.

Services participating in ECCE 2019/20 received one of two capitation rates: the standard rate of €69.00 or the higher rate of €80.25. In 2019/20, over half of ELC services (57% or 2,515 services) were in receipt of Higher Capitation levels for at least one room, an increase of 2% on the previous year. 59% of private services are in receipt of Higher Capitation compared to 51% of community services.

2.3   The National Childcare Scheme (NCS)

Since the beginning of NCS operations in November 2019 up to 24th August 2020, a total of 53,513 children from 42,557 households received subsidies. Of those, 38,238 children received income assessed subsidies; 15,173 children received universal subsidies; and 894 children received sponsored subsidies.

The total value of claims successfully submitted by providers during the same period was €82,564,414, with an average weekly value per claim of €55.48. Under income assessed subsidies, the average weekly value per claim was €67.49; under universal subsidies it was €17.81; and under sponsored subsidies it was €101.31.

2,782 service providers had submitted a successful claim up to 24th August 2020, 1,696 (30%) being private services and 711 (30%) community services.

2.4   Community Childcare Subvention Plus (CCSP)[12]

The Community Childcare Subvention Plus (CCSP) programme is primarily aimed at supporting parents from disadvantaged backgrounds to avail of reduced childcare costs. The DCEDIY funds a portion of these costs for eligible children (a subvention payment), while parents pay the remainder. The introduction of the National Childcare Scheme in November 2019 aimed to replace the CCSP and TEC. Consequently, registrations for CCSP programme have been closed to new applicants[13] after the National Childcare Scheme opened in November 2019.

In the 2019/20 programme year, Community Childcare Subvention Plus included a number of strands:

> CCSP – Community Childcare Subvention Plus

> CCSU – Community Childcare Subvention Universal

> CCSR(T) – Community Childcare Subvention Resettlement (Transitional)

Services need to have the CCSP contract in order to offer any of the strands. In this report, the information related to CCSP, CCSU and CCSR(T) contracts has been grouped together and is reported on jointly under the name CCSP, while information on participating children, families and registrations is reported on by programme strand.

The level of CCSP payments is based on four eligibility bands[14]. Table 2.2 shows the eligibility bands and weekly subvention rates for CCSP, while Table 2.3 specifies the universal subvention rates per session type.

Table 2.2 Eligibility bands and weekly subvention rates under CCSP

Session type[15]	Band A	Band AJ	Band B	Band D
CCSP Full day	€145	€80	€70	€50
CCSP Part-time	€80	€80	€35	€25
CCSP Sessional	€45	€45	€25	€17
CCSP Half session	€22.50	€22.50	€12.50	€8.50

Table 2.3 Maximum universal subvention rate by session type

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

Figure 2.2 presents the breakdown of CCSP registrations by band since 2015/16. There has been a gradual increase in the proportion of registrations with Band A since 2015/16 with yearly interchanges between bands AJ and B. The changes in the distribution of bands mean again in 2019/20, a higher proportion of children availed of top value payments under CCSP compared to the previous year.

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

13 Eligible children that have been registered on CCSP prior to the introduction of NCS can continue to avail of the programme until they no longer require care/reach an age that does not qualify them for support.

14 Details of the bands' eligibility criteria are available at https://www.gov.ie/en/publica tion/ea9ec3-transitional-rules-for-DCEDIY-targeted-childcare-programmes/

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

Figure 2.2 Percentage of CCSP registrations by band 2015/16 – 2019/20
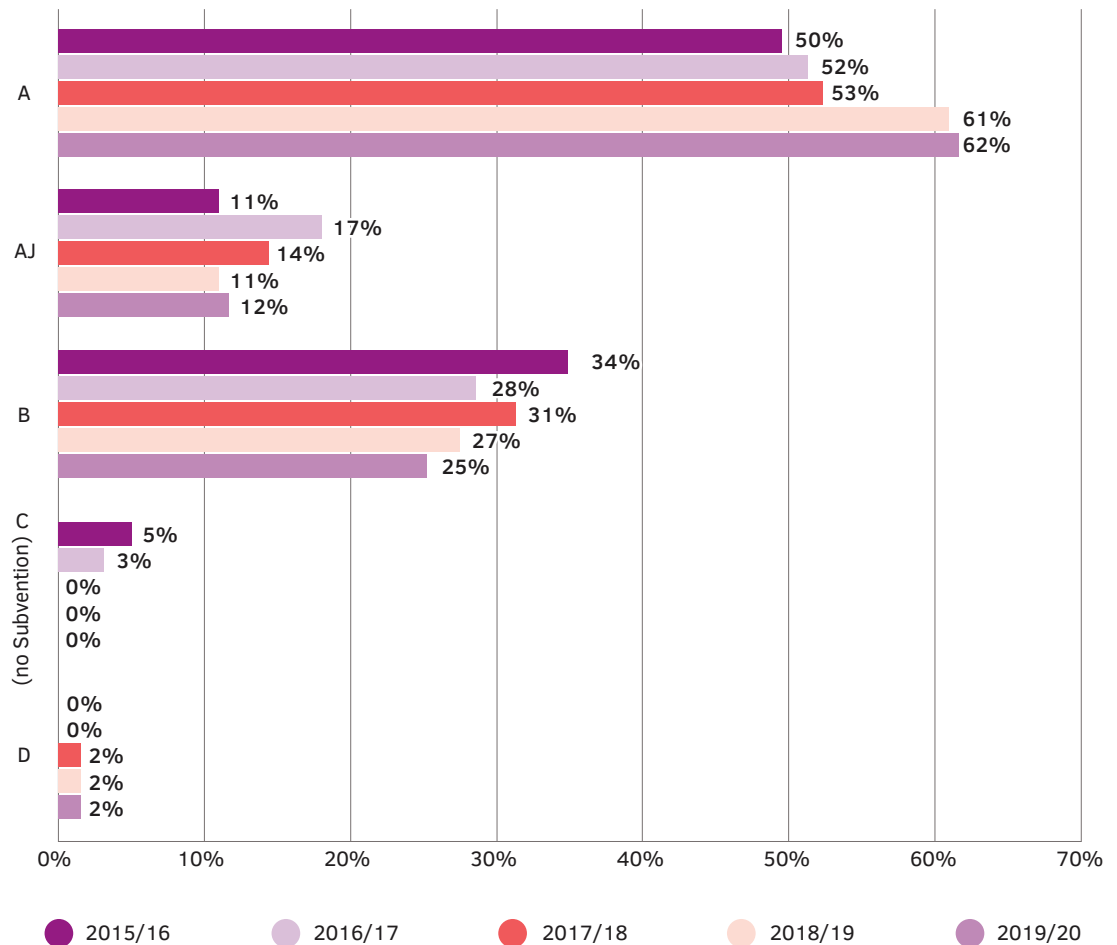
Two additional strands (CCSR and CCSRT, jointly referred to as CCSR(T)) are also part of CCSP. Community Childcare Subvention Resettlement (CCSR) is available to refugees[16] and is designed to promote their integration into Irish society. Parents receive a subvention[17] to enable them to avail of ELC and SAC care while they attend a language and orientation course within their reception centre for eight weeks and then for a full year following their move into the community (i.e. 60 weeks in total). Community Childcare Subvention Resettlement Transitional (CCSRT) provides access to free ELC and SAC care for children of families experiencing homelessness. It provides subvention for all children under six years old inclusive and six to 12 years old during the school holidays only. A daily meal must also be provided for each child, the cost of which is included in the subvention rate.

In 2019/20, 3,180 services were contracted to offer CCSP programme representing a 1% decrease on the previous year. The breakdown of the percentage of private and community services remained the same as last year, at 67% and 33% respectively. During the year, 87% of community services and 64% of private services offered CCSP, an increase of 1% and a decrease of 2%, respectively, since the previous year.

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16 Refugees are eligible for up to a maximum 60 weeks care for 0-5 years olds and for a total of 14 weeks care to cover school holiday periods for 6-12 year olds over a two year period.

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

384 services who were contracted to offer CCSP in 2018/19 have not re-contracted under CCSP in 2019/20. In addition, 30 services out of 835 who had been contracted to offer the CCS programme during 2018/19, which was discontinued in 2019/20, have not re-contracted under CCSP in 2019/20. The total value of approved CCSP (including CCSP, CCSU and CCSR(T)) contracts in 2019/20 was €94,732,642, a reduction of 30% since 2018/19. The decrease in the CCSP contract values is partly a result of the introduction of the NCS, which meant that no new applicants were able to join CCSP after 16th November 2020 as well as some children availing of CCSP in previous years no longer qualifying or requiring ELC/SAC.

In 2019/20 (between September 2019 and 12th March 2020), 38,816 children benefited from CCSP. This is a decrease of 2% on the previous year when 39,539 children were supported under CCSP during the same period (between September 2018 and 15th March 2019). An additional 24,409 children availed of the universal subsidy (CCSU[18]), 18% less than in 2018/19. A further 372 children were supported under CCSR(T), representing a decrease of 25% since 2018/19. The noticeable decreases in the number of children supported across all CCSP strands are a result of the introduction of the NCS programme which meant that no new applicants were able to join CCSP after 16th November 2020 as well as some children availing of CCSP in previous years no longer qualifying or requiring care.[19]

Table 2.4 presents the breakdown of registrations for different strands by provider type. More than half of registrations approved under CCSP (55%) were made in community services, with even higher proportions of CCSR(T) registrations also made in community services (62%). The majority of registrations for CCSU were made in private services (82%).

Table 2.4 Number of registrations under CCSP strands by organisation type

Programme strand	Community	Community %	Private	Private %	Total
CCSP	27,230	55%	22,243	45%	**49,473**
CCSU	4,786	18%	22,026	82%	**26,812**
CCSR(T)	246	62%	153	38%	**399**

Table 2.4 presents a breakdown of CCSP and CCSU registrations by county. The five counties with the largest share of CCSP and CCSU registrations were: Dublin (four local authority areas combined) (24%), Cork City and County combined (8%), which increased from 5% in 2018/19, Donegal and Galway (both 6%) and Limerick (5%). Overall, like in the case of ECCE registrations counties with larger population sizes tended to have the highest numbers of registrations.

There are significant differences in the distribution of CCSP and CCSU registrations at county level (see Table 2.5). Donegal has the highest proportion of CCSP registrations (87%) with Laois and Longford following with 86% and 85% respectively. The county with the lowest proportion of CCSP registrations is Dún Laoghaire-Rathdown (14%) followed by Fingal, (38%) and Kildare (41%). The distribution of CCSP registrations at county level is impacted by the ratio of community and private services within counties. For example, only 13% of services in Dún Laoghaire-Rathdown are community based compared to 47% in Donegal (for details see section 3.2).

18 CCSU was introduced in September 2017 and made available to parents who were not eligible for subsidies under CCS/CCSP or TEC for children up to 3 years old.

19 Due to the limited period of time available for NCS applicants to record a claim prior to the March 12th closure of the ELC/SAC sector there is not enough data available for a meaningful comparison between CCSP and NCS payments or subsidy rates.

Table 2.5 Number and percentage of CCSP and CCSU registrations by county

County	CCSP	CCSP (%)	CCSU	CCSU (%)	Total CCSP and CCSU	Total CCSP and CCSU as % of total registrations
Carlow	1,159	82%	256	18%	1,415	2%
Cavan	1,147	73%	422	27%	1,569	2%
Clare	1,319	65%	699	35%	2,018	3%
Cork City	896	56%	700	44%	1,596	2%
Cork County	1,951	46%	2,302	54%	4,253	6%
Donegal	3,812	87%	570	13%	4,382	6%
Dublin – Dublin City	4,963	61%	3,230	39%	8,193	11%
Dublin – Dún Laoghaire-Rathdown	365	14%	2,164	86%	2,529	3%
Dublin – Fingal	1,366	38%	2,246	62%	3,612	5%
Dublin – South Dublin	2,008	52%	1,843	48%	3,851	5%
Galway	2,857	63%	1,713	37%	4,570	6%
Kerry	2,268	77%	671	23%	2,939	4%
Kildare	916	41%	1,341	59%	2,257	3%
Kilkenny	1,226	69%	543	31%	1,769	2%
Laois	1,719	86%	279	14%	1,998	3%
Leitrim	685	80%	175	20%	860	1%
Limerick	2,928	74%	1,045	26%	3,973	5%
Longford	862	85%	155	15%	1,017	1%
Louth	1,635	73%	592	27%	2,227	3%
Mayo	1,216	80%	311	20%	1,527	2%
Meath	1,421	57%	1,072	43%	2,493	3%
Monaghan	1,808	77%	530	23%	2,338	3%
Offaly	499	65%	263	35%	762	1%
Roscommon	762	71%	304	29%	1,066	1%
Sligo	1,516	75%	493	25%	2,009	3%
Tipperary	2,606	77%	791	23%	3,397	5%
Waterford	1,818	82%	386	18%	2,204	3%
Westmeath	962	71%	398	29%	1,360	2%
Wexford	1,883	74%	647	26%	2,530	3%
Wicklow	900	57%	671	43%	1,571	2%
Total	49,473	65%	26,812	35%	76,285	100%

There were 91 children registered under CCSR (Resettlement) in 35 separate services and 281 children registered under CCSRT (Transition) across 107 services in the period between September 2019 and 12th March 2020. Children availed of CCSR in 14 out of 30 counties, with the highest number of registrations recorded in Roscommon (28) and Waterford (17). The lowest number of CCSR registrations were in Sligo and South Dublin – one in each county. Children availed of CCSRT in 15 out of 30 counties. The number of CCSRT registrations in Dublin City was significantly higher (154) than other counties, e.g. the next highest number was in Galway, with 23 registrations.

2.5   Training and Employment Childcare (TEC)

Training and Employment Childcare (TEC) is an overarching programme, specifically designed to support parents/ guardians on eligible training and education courses, as well as certain categories of parents/guardians returning to work, by providing subsidised ELC and SAC places. Similarly to CCSP, the introduction of the National Childcare Scheme in November 2019 aims to replace the TEC programme. Registrations for TEC programme have been closed to new applicants[20] since 14th February 2020.

The programme comprises of three strands administered by Pobal on behalf of the Department of Children, Equality, Disability, Integration and Youth:

> **Childcare Education and Training Support Programme** (CETS) provides ELC and SAC care to training course participants on courses provided by the local Education and Training Boards (ETBs, formerly FÁS and Vocational Education Committees) and secondary schools.

> **After-School Child Care Programme** (ASCC) provides care for primary school children for certain categories of working parents and parents on Department of Social Protection (DSP) employment programmes (excluding Community Employment)[21].

> **Community Employment Childcare Programme** (CEC) provides care for children of parents who are participating in the Community Employment scheme. There are two strands within CEC, namely CEC(PS) (pre-school) and CEC(AS) (after-school).

In 2019/20, 1,600 (35%) services were contracted to offer at least one strand of TEC, a decrease of 2% on the previous year. The number of services offering each strand has also decreased, with the highest reduction of 11% observed for ASCC. Similar to the previous year, over two thirds of services offering TEC (68%) were private. See Table 2.6 for full details.

Table 2.6 Number and percentage of services contracted to offer the TEC Programme

Programme strand	Community		Private		All services with TEC contract		
	Number	%	Number	%	Total 2019/20	% of total TEC services	Total 2018/19
ASCC	315	31%	713	69%	1,028	64%	1,153
CEC (AS)	397	36%	699	64%	1,096	69%	1,174
CEC (PS)	403	38%	643	62%	1,046	65%	1,117
CETS	502	33%	1,023	67%	1,525	95%	1,603
Total (offering at least one strand)	520	32%	1,080	68%	1,600	100%	1,684

20 Information about these programmes is available on the DCEDIY website, via the following link: https://www.gov.ie/en/publication/ea9ec3-transitional-rules-for-DCEDIY-target-ed-childcare-programmes/

21 Parents of one or more children between the ages of 4 to 13 are eligible under the following conditions: if one or both parents has been in receipt of any the following payments for more than three months - Jobseeker's Allowance, Jobseeker's Benefit, Jobseeker's Transitional payment or One-Parent Family Payment; if one or both parents on an employment support programme; if one or both parents are on the Working Family Payment for any length of time and increase their working hours.

In 2019/20 (up to 12th March 2020), 1,545 parents/guardians benefitted, and 2,204 children participated in TEC programmes. This represents a 31% decline in the number of children when compared to the 2018/19 programme year (up to 15th March 2019). The number children benefiting from TEC has been decreasing every year since 2014/15, however, the rate of the decrease has grown even further in 2019/20, from 25% to 31%.

Over half of all TEC registrations were for children availing of CETS (56%), while the smallest proportion of children benefitted from ASCC (4%) – see Table 2.6 for details. The overall number of TEC registrations has been decreasing on an annual basis since 2014/15, while a decline in registrations across all the TEC strands has been observed since 2017/18. The overall reduction in the number of registrations across all TEC programmes was 33% on the previous year (15th March 2019 to 12th March 2020).

While the number of TEC registrations has been decreasing on an annual basis since 2014/15, the acceleration of the rate of decrease in 2019/20 is likely linked to the introduction of the NCS and the transition of children from legacy schemes to the new programme. The largest decline in registrations since last year was recorded for ASCC, at 64%. This is likely due to a large number of parents having reached their maximum allowance and therefore being required to register under CCSP (before the NCS launch) and the NCS (from 20th November 2019).

Table 2.7 presents the number and percentage of TEC registrations at county level. The share of registrations for different strands of TEC varies significantly between counties. In 27 out of 30 counties, ASCC accounted for 10% or less of all TEC registrations, with notable exceptions in Cork County and Offaly, where ASCC accounted for 16% of all TEC registrations. In 20 out of 30 counties, CETS accounted for at least half of all TEC registrations, with the highest proportion of TEC (88%) recorded in South Dublin. CEC registration figures also vary significantly between counties from 56% in Longford to 0% in both Cork City and Dún Laoghaire- Rathdown for CEC (AS) and from 7% in South Dublin to 50% in Dún Laoghaire- Rathdown for CEC (PS).

Table 2.7 Number and percentage of TEC programme registrations by county (up to 12th March 2020)

County	ASCC	ASCC %	CEC (AS)	CEC (AS) %	CEC (PS)	CEC (PS) %	CETS	CETS %	Total TEC registrations
Carlow	0	0%	20	39%	5	10%	26	51%	51
Cavan	4	5%	28	33%	30	36%	22	26%	84
Clare	0	0%	21	36%	8	14%	29	50%	58
Cork City	3	10%	0	0%	7	24%	19	66%	29
Cork County	14	16%	8	9%	15	17%	49	57%	86
Donegal	12	10%	35	29%	19	16%	54	45%	120
Dublin – Dublin City	4	2%	16	9%	47	27%	110	62%	177
Dublin – Dún Laoghaire-Rathdown	0	0%	0	0%	3	50%	3	50%	6
Dublin – Fingal	13	8%	4	2%	15	9%	135	81%	167
Dublin – South Dublin	2	1%	6	4%	10	7%	127	88%	145
Galway	4	3%	21	16%	12	9%	94	72%	131
Kerry	4	3%	35	24%	45	31%	61	42%	145
Kildare	0	0%	20	16%	13	10%	96	74%	129
Kilkenny	0	0%	13	25%	5	10%	33	65%	51
Laois	0	0%	14	16%	13	15%	59	69%	86
Leitrim	0	0%	4	17%	5	21%	15	63%	24
Limerick	1	1%	6	7%	26	30%	55	63%	88
Longford	2	6%	18	56%	7	22%	5	16%	32
Louth	0	0%	40	44%	43	47%	8	9%	91
Mayo	0	0%	7	18%	6	15%	26	67%	39
Meath	2	3%	21	34%	17	28%	21	34%	61
Monaghan	0	0%	40	32%	44	35%	41	33%	125
Offaly	6	16%	8	21%	6	16%	18	47%	38
Roscommon	1	2%	8	15%	12	22%	34	62%	55
Sligo	4	8%	11	21%	5	10%	32	62%	52
Tipperary	2	2%	15	15%	19	19%	65	64%	101
Waterford	4	3%	6	5%	15	13%	95	79%	120
Westmeath	7	11%	30	49%	18	30%	6	10%	61
Wexford	2	2%	30	28%	32	30%	42	40%	106
Wicklow	0	0%	16	28%	6	11%	35	61%	57
Total	91	4%	501	20%	508	20%	1,415	56%	2,515

The total value of approved TEC contracts in 2019/20 was €4,965,254, with €4,687,730 paid out under the scheme (94%). This represents a decline of 42% relative to the previous programme year and a continuation of the trend which saw a decrease of 29% between 2017/18 and 2018/19.

2.6 COVID-19 Capital grant and Re-opening Support Payment

2.6.1 COVID-19 Capital Grant

On 10th June 2020, the Minister for Children, Equality, Disability, Integration and Youth announced a funding package to facilitate the reopening of ELC/SAC services. Part of this funding package was the COVID-19 Capital Grant (€14.2million) which was to contribute towards the capital costs associated with the reopening of services on 29th June 2020.

The grant was aimed to enable ELC and SAC services to make modifications to their facilities and outdoor areas, purchase the necessary equipment to ensure compliance with the Public Health Advice and COVID-19 Infection Prevention and Control Guidance[22] for ELC and SAC services. The amount of grant which was to be paid to each service was based on the number of individual children registered in a service on one or more DCEDIY programmes on 12th March 2020. Funding up to €6,000 per service was available depending on the number of children registered. The scheme was open for applications from 22nd June to 28th August 2020 and all services opening between 29th June and early September were eligible to apply.

Allowable expenditure included:

> Outdoor play equipment

> Outdoor shade and shelter to enable outdoor play as much as possible

> Additional handwashing and toilet facilities

> Purchase of partitions or room dividers to enable play pods to remain separate in larger rooms

> Installation of screens in reception areas

Table 2.8 COVID-19 Capital grant applications and funding value

Programme	No. applications submitted	No. applications approved	Total amount approved
COVID-19 Capital Grant	4,169	4,046	**€12,696,500**

2.6.2   Reopening Support Payment

Reopening Support Payment (RSP) was also announced as part of reopening package. The purpose of the RSP (€18 million) to ELC and SAC services was to support them in meeting the reopening guidelines, to support children to remain in 'play pods' to reduce the potential for COVID-19 to spread and to meet additional staffing needs during the reopening period. The RSP was provided in recognition of the fact that a reduced number of children were likely to attend ELC and SAC services in the initial weeks of reopening. Allowable expenditure included:

> additional staffing costs, such as staff in reception to manage staggered drop off and pick up times, and additional cleaning to ensure that hygiene standards are met, also intensive staff training pre-opening

> additional learning resources and toys so that each play pod has their own ring-fenced resources which are not shared with other play pods

> hygiene supplies/consumables, such as sanitiser, soap and paper towels

> cleaning consumables

Like in the case of the COVID-19 Capital grant, the amount of the grant for each individual service was based on the number of children on DCEDIY schemes in the service as of 12th March 2020. Services that opened on a full-time basis and were open for six of the eight weeks between 29th June and 23rd August 2020 were eligible to receive a higher grant than services operating part-time hours or which reopened in late August or September. The scheme was open for applications from 22nd June to 28th August 2020. The lower number of applications, when compared to the COVID-19 Capital Grant, was due to the availability of the Restart Grant through DBEI, which some eligible providers opted for instead.

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22 Infection Prevention and Control Guidance – Health Protection Surveillance Centre (hpsc.ie)

2.6.3   Temporary Wage Subsidy Childcare Scheme

The Temporary Wage Subsidy Childcare Scheme (TWSCS) was offered to ELC/SAC providers from 6th April up until the start of the reopening phase on 29th June. In addition to the national revenue operated Temporary Wage Subsidy Scheme (TWSS), TWSCS funding was made available to providers to top-up the wage subsidy provided for childcare staff.

TWSCS funding was also made available to cover any ongoing or non-deferrable operational costs for the period of the scheme, as well as consumables such as Personal Protective Equipment (PPE).

Table 2.9 Reopening Support Payment applications and funding value

Programme	No. applications submitted	No. applications approved	Total amount approved
Reopening Support Payment	3,956	3,833 (97%)	€13,177,249

2.7   Access and Inclusion Model (AIM)

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

AIM is a child-centred model, involving seven levels of progressive support, moving from the universal to the targeted, based on the needs of each child. AIM seeks to offer tailored, practical supports based on need, and does not require a formal diagnosis of disability.[23] AIM provides a suite of universal and targeted supports across seven levels, as shown in Figure 2.3.

Figure 2.3 Model of supports to access to the ECCE programme for children with a disability
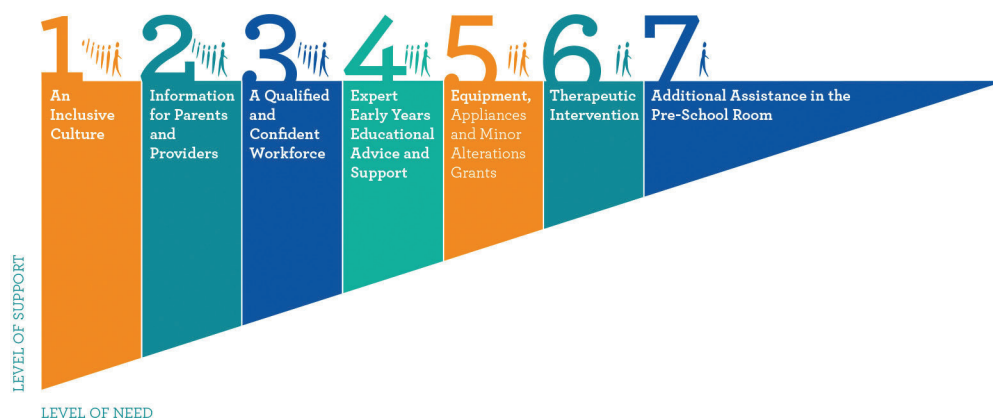
AIM's universal supports Levels 1 – 3 foster an inclusive culture in settings, and include training for services and information resources for parents. Supports are provided by City and County Childcare Committees, the LINC consortium, Pobal and Better Start. AIM's targeted support Levels 4-7 are child-centred and designed to be responsive to the needs of each individual child in the context of their pre-school setting. They do not require a formal diagnosis of disability. AIM Levels 4, 5 & 7 are delivered through Better Start while Level 6 therapeutic supports are delivered through the HSE.

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

Under Level 3, between September 2019 and July 2020, Better Start delivered 32 Hanen courses to 245 participants from 160 services and 12 Lámh courses to 159 participants from 120 services. Table 2.10 shows the number of services per county undertaking Lámh and Hanen training and also those with employees approved for "Leadership for Inclusion in the Early Years" (LINC). Pre-school settings employing a LINC graduate (who has agreed to take on the role and responsibilities of Inclusion Co-ordinator) will attract an increased rate of ECCE capitation per child payable to that setting. Donegal had the highest proportion of services undertaking either Hanen or Lámh training (18%), with Dublin-Dún-Laoghaire Rathdown and Wicklow both having the lowest (2%). Kerry did not have any services undertaking training. Longford had the highest proportion of services with an employee approved for LINC (58%) with Dublin City having the lowest (27%)

Table 2.10 Number of services undertaking Lámh and Hanen training and approved for AIM Level 1 (LINC)

County	No. services undertaking Level 3 Hanen / Lámh Training	% of services in each county undertaking Level 3 Hanen / Lámh Training	No. services approved for LINC	% of services in each county approved for LINC
Carlow	7	14%	26	51%
Cavan	6	9%	30	45%
Clare	8	6%	54	39%
Cork City	8	8%	29	29%
Cork County	34	9%	185	47%
Donegal	28	18%	64	40%
Dublin – Dún Laoghaire-Rathdown	3	2%	65	36%
Dublin – South Dublin	12	5%	105	41%
Dublin – Dublin City	12	3%	119	27%
Dublin – Fingal	22	7%	121	38%
Galway	27	9%	135	46%
Kerry	0	0%	60	45%
Kildare	17	9%	92	47%
Kilkenny	12	12%	40	39%
Laois	3	3%	36	40%
Leitrim	3	8%	16	43%
Limerick	17	8%	86	42%
Longford	3	8%	22	58%
Louth	7	6%	49	42%
Mayo	16	12%	57	42%
Meath	22	11%	91	44%
Monaghan	9	16%	22	38%
Offaly	11	16%	36	51%
Roscommon	4	7%	26	43%
Sligo	8	10%	25	32%
Tipperary	24	13%	89	49%
Waterford	9	9%	52	51%
Westmeath	6	7%	39	45%
Wexford	23	16%	81	55%
Wicklow	3	2%	83	46%
Total	364	15%	1,935	81%

The data for programme call 2019/20 provided in this section represents a snapshot taken on 28th October 2020 and any comparisons made are with 2018/19 programme call data taken on 16th September 2019 as reported in last year's sector profile.

In 2019/20, 5,708 children were supported under the Access and Inclusion Model by 2,428 services. Relative to the previous year[24], there was a 1.7% increase in the number of services receiving support under AIM and an increase of 3.5% in the number of children[25] receiving support.

In 2019/20, 1,998 services received Level 4 supports, which involved Better Start Early Years Specialists (EYS) providing on-site or online mentoring to ECCE services and supported both services and parents to access additional resources. EYS's completed almost 6,900 site visits to ELC services and continued to provide advice and mentoring supports remotely by phone, email and video conferencing after services closed on 12th March 2020 due to COVID-19.

In 2019/20, 3,926 children received Level 4 support, a decrease of 1.4% on the previous year. Of these, 2,843 (72%) progressed to also receive Level 7 support during 2019/20.

In 2019/20, 2,170 services were in receipt of Level 7 supports, which provides funding for staff for an additional 10 to 15 hours a week to enable services to reduce the staff-to-child ratio in an ECCE setting.

During 2019/20, 2,170 services received Level 7 support, a 7% increase since 2018/2029. This increase can be linked to the greater number of services engaging with AIM overall. Of these services, 1,018 services were in receipt of Level 7 second year extension supports for children entering their second year of ECCE.

The total number of children accessing Level 7 supports in 2019/20 was 4,585 which is an increase of 17% since 2018/19. These children represented 4.3% of all children availing of ECCE during 2019/20. In comparison, in 2018/19, 3.6% of children accessing ECCE received AIM Level 7 support.

The majority of children receiving Level 7 supports (3,151 or 69%) were accessing these supports for the first time, with the remaining 1,438 children (31%) accessing them for the second year.

Level 5 consists of two different types of supports: capital funding towards minor alterations and access to specialist equipment, for which there is a separate application process. In 2019/20, 250 services received Level 5 supports, 31 received capital funding for alterations and 242 received support to purchase specialist equipment. Of these, 23 services received supports for both alterations and equipment. The number of services receiving Level 5 supports decreased by 17% compared to the previous year when 302 services were supported.

Table 2.11 shows the number of services in receipt of support at Levels 4, 5 and 7 broken down by county[26]. The highest proportion of all services that provide AIM was in Louth and Offaly (67%), while the lowest uptake was recorded in Sligo at 28%.

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24 Under the 2018/19 programme call 2,388 services were supported under AIM.

25 Under the 2018/19 programme call 5,513 children were supported under AIM.

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

Table 2.11 Number of services providing AIM by county and level

County	Level 4	Level 5 Alterations & Equipment	Level 7	Number of services receiving AIM supports by county	% of services in each county in receipt of AIM support	% of services in each county in receipt of AIM Level 7 support
Carlow	24	6	28	30	59%	55%
Cavan	30	3	33	37	55%	49%
Clare	49	8	68	70	51%	50%
Cork City	49	9	54	56	57%	55%
Cork County	206	30	232	255	65%	59%
Donegal	69	11	62	86	54%	39%
Dublin – Dublin City	150	13	168	191	43%	38%
Dublin – Dún Laoghaire-Rathdown	59	5	61	72	39%	33%
Dublin – Fingal	130	8	136	156	49%	43%
Dublin – South Dublin	128	12	134	145	57%	53%
Galway	107	16	118	137	46%	40%
Kerry	65	11	71	79	59%	53%
Kildare	95	11	95	109	56%	48%
Kilkenny	41	8	46	50	49%	45%
Laois	41	7	46	47	52%	51%
Leitrim	15	2	14	18	49%	38%
Limerick	83	10	95	105	51%	47%
Longford	17	4	15	17	45%	39%
Louth	66	6	71	79	67%	60%
Mayo	60	11	68	75	55%	50%
Meath	102	18	117	124	59%	56%
Monaghan	28	1	27	30	52%	47%
Offaly	44	4	43	47	67%	61%
Roscommon	24	1	29	33	55%	48%
Sligo	16	4	16	22	28%	21%
Tipperary	83	5	95	101	55%	52%
Waterford	43	7	46	50	49%	45%
Westmeath	39	5	39	46	53%	45%
Wexford	67	12	73	83	56%	50%
Wicklow	68	2	70	78	43%	39%
Total	1,998	250	2,170	2,428	52%	47%

2.8   DCEDIY Programmes in 2019/20 – summary

Over the entire programme year, 180,149 children availed of at least one of the DCEDIY funded programmes (ECCE, NCS[27], CCSP or TEC). For the first time since 2016/17 the total number of children availing of the DCEDIY programme have decreased, by 3%, on the previous year. The number of children supported over the last four years is included in Figure 2.4.

Figure 2.4 Total number of children supported under DCEDIY programmes between 2016/17 and 2019/20
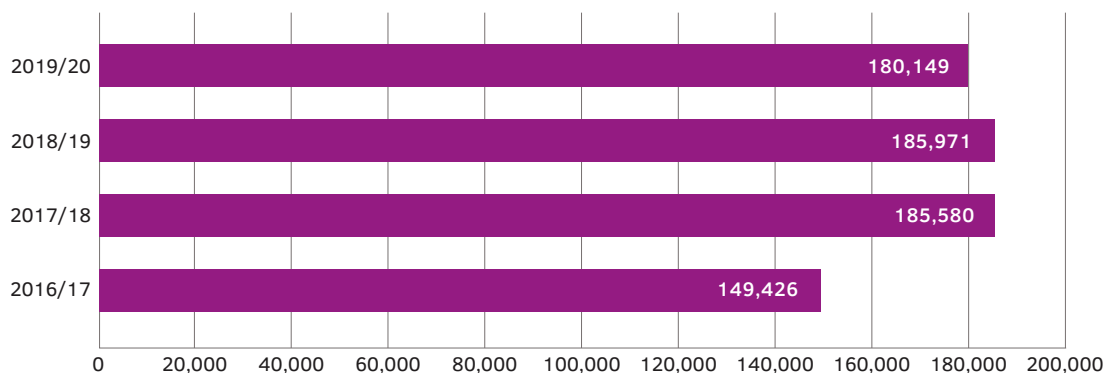
The introduction of the NCS in November 2019 led to the reduction in the number of children participating in the legacy programmes, such as CCSP (7%), CCSU (23%) and TEC (34%), as no new applicants could be registered on these schemes since November 2019 for CCSP and February 2020 for TEC.

The number of children participating in ECCE has also decreased by 2% on the previous year, however, this reduction arises from the decrease in the total population of children eligible for the programme (decline in the birth rates). The number of children participating in different schemes over the last six years in shown in Figure 2.5.

27 Note: NCS does not follow the same programme year structure as the other programmes (ECCE, CCSP and TEC).

Figure 2.5 Number of children supported under ECCE, CCS/CCSP*, CCSU**, TEC and NCS between 2016/17 and 2019/20
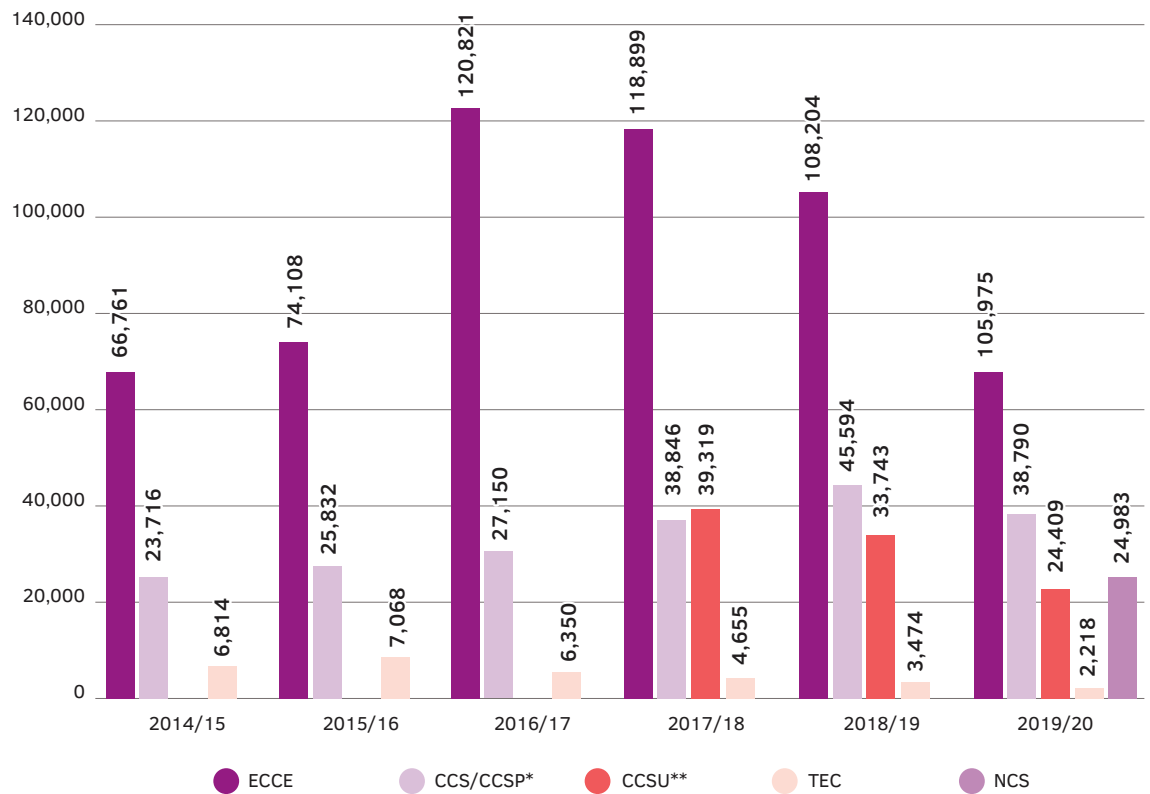
* CCS/CCSP figures for 2019/20 refer to CCSP only as CCS was not open for registrations in 2019/20.

** CCSU first opened for registrations in the 2017/18 period so there is no comparative data from previous years.

The closure of services from 12th March to 28th June 2020 resulting from the COVID-19 pandemic has likely had an impact on the number of participating children, especially on the NCS scheme, for which applications are open all year round. Consequently, the value of subsidies paid out under these programmes (see Figure 2.6) has been much lower compared to the previous year as the payment of registration/claim-based subsidies to services was stopped in April 2020, while services remained closed. DCEDIY funded ELC and SAC programmes was repurposed for other supports to ELC and SAC services, such as the Temporary Wage Subsidy Childcare Scheme (TWSCS) and the Employment Wage Subsidy Scheme (EWSS).

Figure 2.6 Total annual value of registrations/subsidies paid out across all DCEDIY programmes between 2016/17 and 2019/20

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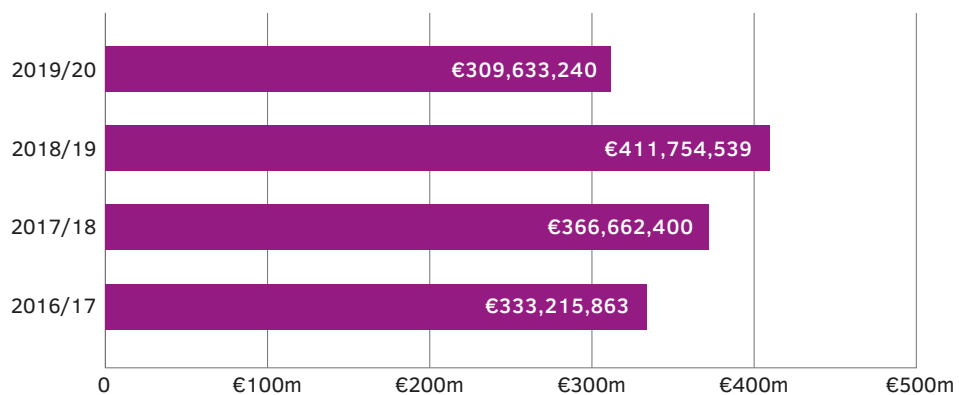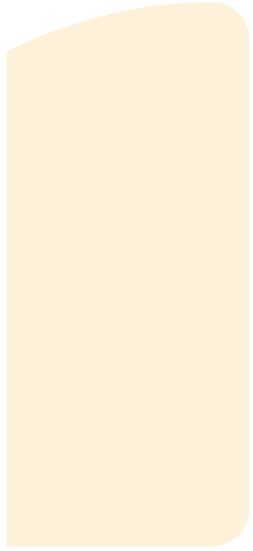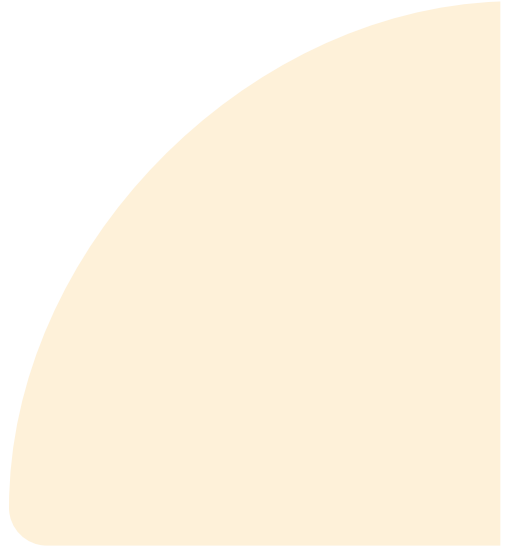
Profile of Early Learning and Care and School-Age Childcare services

3.1   Introduction

This chapter provides an overview of the main characteristics of Early Learning and Care (ELC) and School-Age Childcare (SAC) services. These include the organisation type, geographical location, participation in funding programmes, types of provision, opening hours, payment of commercial rates, outdoor space, and provision of education through Irish. The three data sources used in the analysis in this chapter are data recorded in the Programmes Implementation Platform (PIP) and Early Years Platform (EYP), which include all services contracted to deliver DCEDIY programmes, and data collated through the service profile survey completed by 65% of services.

During the 2019/20 programme year, 4,690 services were contracted to provide at least one of the four DCEDIY funding programmes, namely The National Childcare Scheme (NCS), Early Childhood Care and Education (ECCE), Community Childcare Subvention (including CCSP, CCSU and CCSR(T)) and/or Training and Employment Childcare (TEC). Compared to 2018/19, 92 more services (2%) were contracted to deliver these programmes.

3.2   Type of service and geographical distribution

In Ireland the majority of ELC and SAC services are operated by private (for profit) organisations. In 2019/20 private services accounted for 74% (3,476) of all services contracted to provide at least one of the funding programmes, with community programmes accounting for the remaining 26% (1,214). Over recent years, there has been a slight increase in the number of private services while the number of community services has remained relatively constant, as shown in Figure 3.1.

Figure 3.1 Number of Early Learning and Care and School-Age Childcare services by organisation type 2012/13 – 2019/20
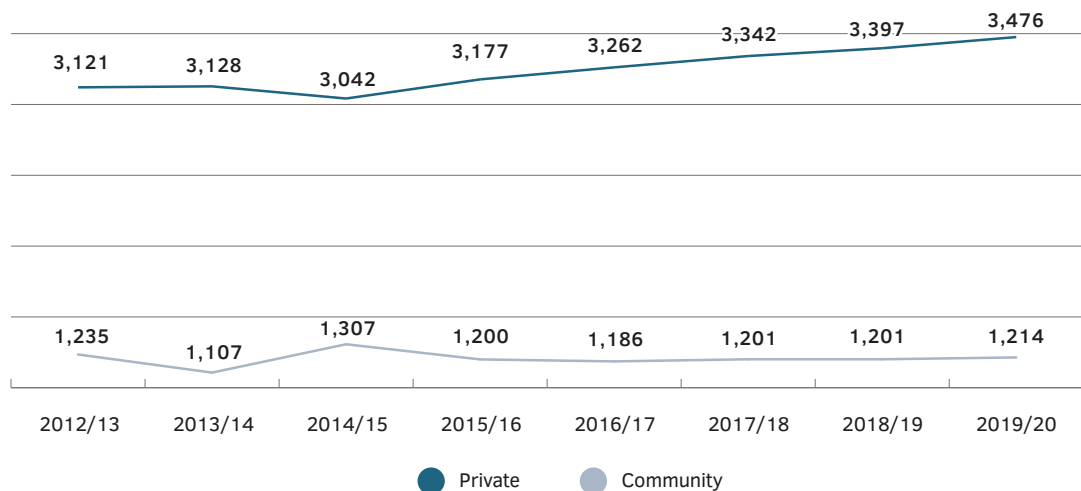
65% (3,070) of services were located in urban areas and 35% (1,620) were located in rural areas. Table 3.1 shows the overall urban/rural distribution of community and private facilities over the last five years. There has been a slight increase in the proportion of services located in rural areas, compared to the previous year, from 34% in 2018/19 to 35% in 2019/20.

Table 3.1 Percentage of services by organisation and urban/rural 2015/16 – 2019/20

	2015/16		2016/17		2017/18		2018/19		2019/20	
	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural
All services	61%	39%	60%	40%	66%	34%	66%	34%	65%	35%
Private	64%	36%	63%	37%	69%	31%	68%	32%	68%	32%
Community	52%	48%	52%	48%	58%	42%	58%	42%	58%	42%

The Pobal Haase-Pratschke Index provides a method of measuring the relative affluence or disadvantage of a particular geographical area using data compiled from the national Census. The index uses information, such as unemployment, educational attainment and population change to calculate an affluence/deprivation score of an area. The location of each Early Learning and Care and School-Age Childcare service was assigned the HP Index score based on the Electoral Division (ED) in which it was located. Figure 3.2 shows the number of services by the level of disadvantage of the area where the service is located.

The vast majority of services were located in areas classified either marginally above or below average (84%). In comparison, according to the 2016 Census 73% of the total population of Ireland lives in these areas. Community services are more likely to be located in less affluent areas compared to their private counterparts. The number of community services, located in marginally below average areas (637), is almost twice the number located in areas that are marginally above average (338). Only 3% of community services were located in affluent or very affluent areas compared to 11% of private services. These proportions were reversed in disadvantaged areas, where 17% of community services were located compared to 4% of private services.

Of the 24 services that were operating in very and extremely disadvantaged areas, all but one were community settings (23). Only 0.5% of all services were located in extremely disadvantaged areas, although 2.9% of the population reside in these locations.

Figure 3.2 Number of services by the level of disadvantage of the area where the service is located
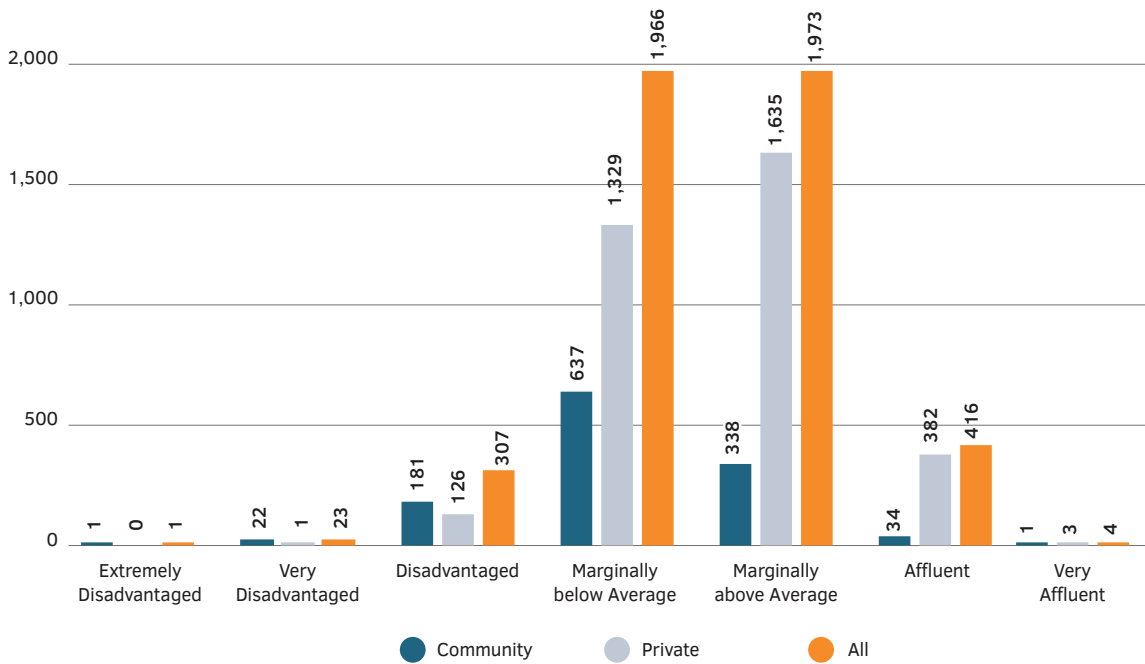
Table 3.2 presents the county breakdown of services by organisation type, including a total number of services in each region. The ratio of community to private service providers varies significantly between counties (see Figure 3.3). Similar to 2018/19, the counties with the highest proportions of community services are Monaghan (58%), Leitrim (54%) and Donegal (47%). The counties with the lowest proportion of community services are generally located in Dublin and the Mid-Eastern Region: Dublin – Fingal (6%), Kildare (6%), Meath (11%), Dublin – Dún Laoghaire-Rathdown (12%), Wicklow (13%), Dublin – South Dublin (16%), and Louth (18%).

Table 3.2 Number of ELC and SAC services by county and organisation type

Row	Community	Private	Grand Total
Carlow	18	33	51
Cavan	27	41	68
Clare	33	105	138
Cork City	46	58	104
Cork County	94	306	400
Donegal	74	85	159
Dublin – Dublin City	158	292	450
Dublin – Dun Laoghaire-Rathdown	23	164	187
Dublin – Fingal	20	302	322
Dublin – South Dublin	42	217	259
Galway	82	216	298
Kerry	57	79	136
Kildare	11	188	199
Kilkenny	29	76	105
Laois	18	75	93
Leitrim	21	18	39
Limerick	56	150	206
Longford	15	23	38
Louth	21	97	118
Mayo	57	80	137
Meath	24	185	209
Monaghan	34	25	59
Offaly	18	53	71
Roscommon	27	35	62
Sligo	29	49	78
Tipperary	46	140	186
Waterford	41	61	102
Westmeath	22	65	87
Wexford	47	101	148
Wicklow	24	157	181
Grand Total	1214	3476	4690

Figure 3.3 Percentage of services by county and organisation type
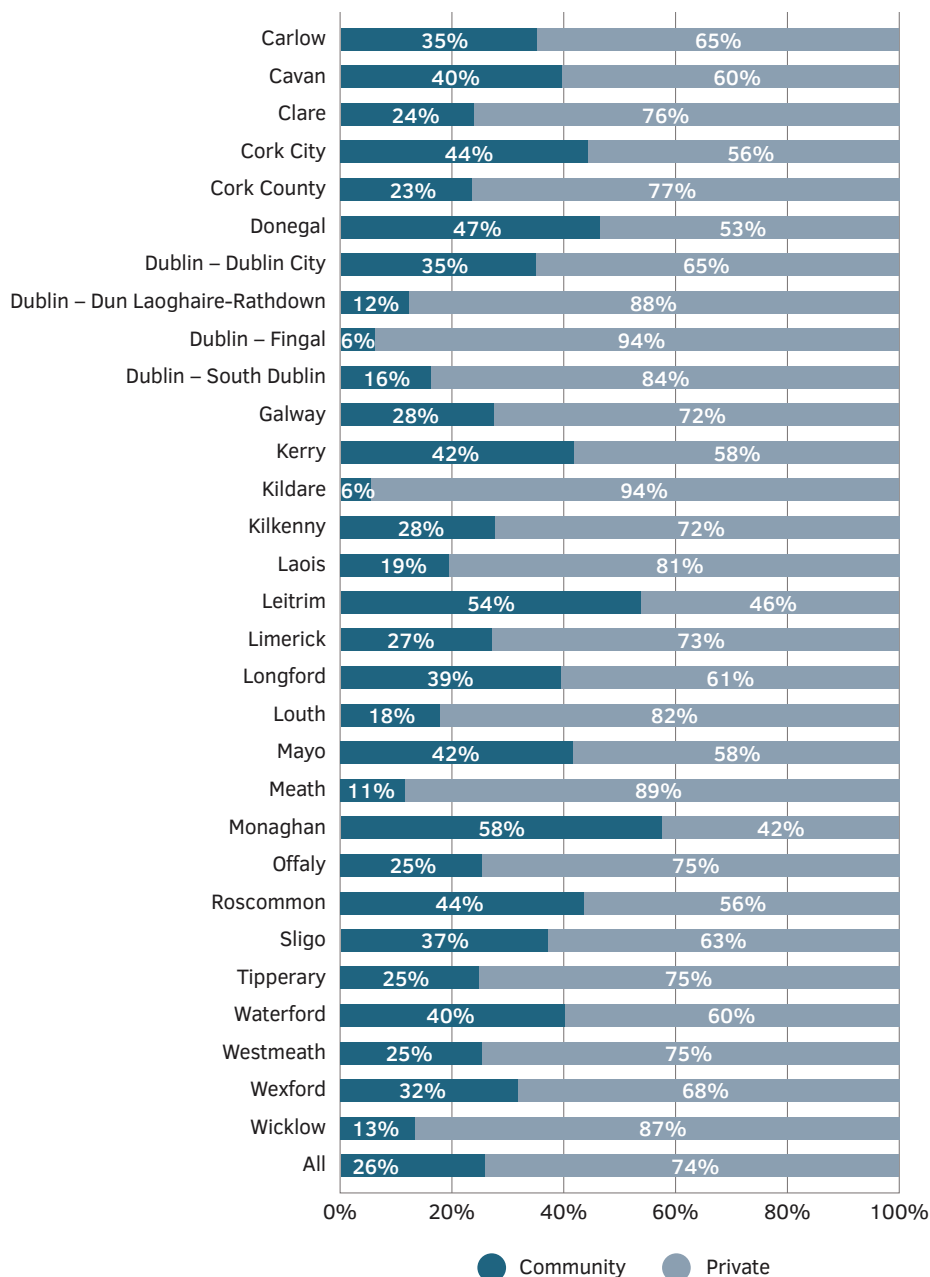
3.3   Funding programmes

In 2019/20, Early Learning and Care and School-Age Childcare services were contracted to offer up to four funding programmes. The ECCE programme has the highest level of uptake, with 90% of services offering it (4,224). For comparison, in 2018/19, three more services offered ECCE (92% of all services). The proportion of services offering TEC fell during the year to 34% from 37% in the previous year.

Table 3.3 provides a breakdown of services by funding programme in 2019/20 and by organisation type. A higher proportion of private services offer ECCE (92%) compared to 84% of community services, while community services are more likely to offer CCSP and TEC, as well as the NCS.

Contracts for the National Childcare Scheme do not follow the traditional programme year like the other Programmes. The NCS data shows services that had an active NCS 2019 contract, and/or had also signed an NCS 2020 contract at the snapshot date. More information on the performance of the National Childcare Scheme can be found in the NCS Annual Report 2019 and 2020.

Table 3.3 Number and percentage of services by funding programme

Funding Programme	Community	Community % (1,214)	Private	Private % (3,476)	Total number of services	% of all participating services
ECCE	1,021	84%	3,203	92%	4,224	90%
CCSP	1,055	87%	2,125	61%	3,180	68%
TEC	520	43%	1,080	31%	1,600	34%
NCS[28]	711	59%	1,696	49%	2,407	51%

3.4   Types of Early Learning and Care and School-Age Childcare

This section is based on analysis of data from the service profile survey. Services were asked about the type of service provided. The most common type of service offered is sessional a.m., with 84% of services offering this type of care.

Compared to 2018/19, the proportion of services offering different service types remains similar (all are within 4% of last year's figures). There were 4% less services offering sessional a.m. and 2% less offering sessional p.m. care. Also the proportion of services offering full time care decreased by 2%.

Figure 3.4 Number and percentage of services by service type offered[29]
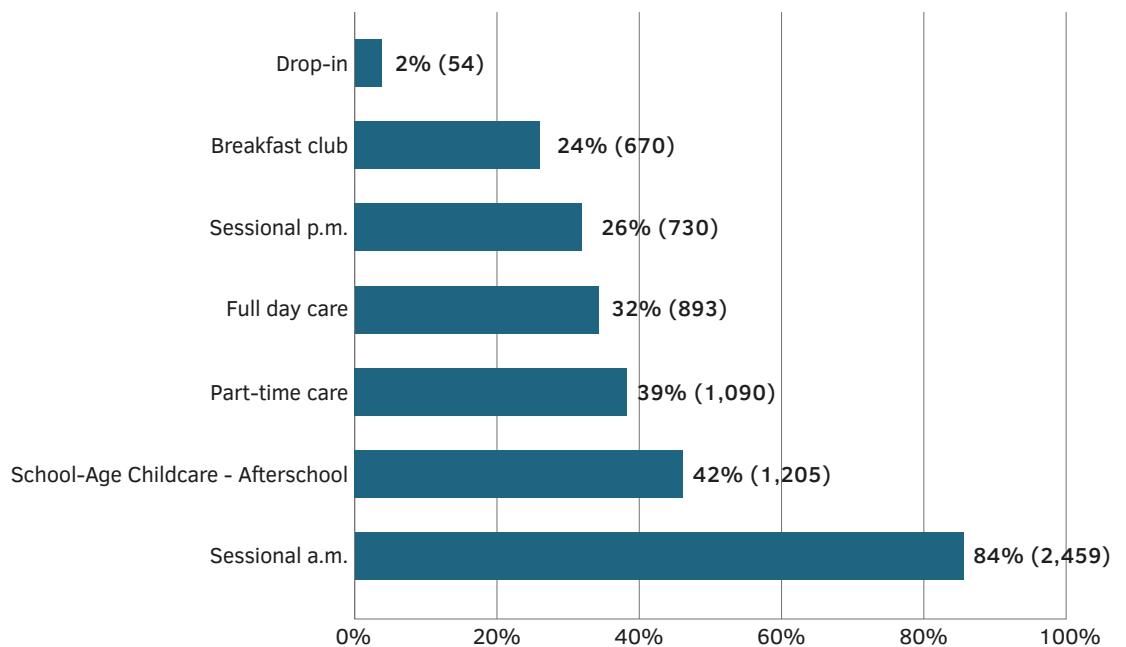
Out of 2,964 survey respondents 1,255 (42%) indicated that they provided in term school-age childcare, while 818 (30%) reported offering out of term school-age childcare. Community services are more likely to offer school-age childcare, both in term (49%) and out of term (35%), when compared to their private counterparts (39% and 28% respectively). Services located in rural areas are more likely to offer school-age childcare in term, while a higher proportion of those operating in urban areas offer school-age childcare out of term. For a detailed breakdown see Table 3.4.

28 These figures cover the launch of the National Childcare Scheme in November 2019 until services closed due to COVID-19 on March 12th

29 Data for this questions was available for 2,806 services.

Table 3.4 Percentage of services offering school-age childcare by type of provider and urban/rural location

	Community (887)	Private (2,077)	Urban (1,849)	Rural (1,115)	All (2,964)
% of services offering school-aged childcare in term	49%	39%	41%	45%	**42%**
% of services offering school-aged childcare out of term	35%	28%	34%	28%	**30%**

3.5   Opening hours

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

Figure 3.5 outlines the percentage of services by number of hours services operate per week during the term time. Almost one third of services (32%) operate 15 hours or less during term time. Private services (33%) are slightly more likely to be open for 15 hours or less than community services (27%).

31% open for more than 40 hours a week during term. Of these community services are more likely to open between 41 and 50 hours (22%) while private services are more likely to open for over 50 hours a week (15%).

Figure 3.5 Percentage of services by number of hours services operate per week (in term)
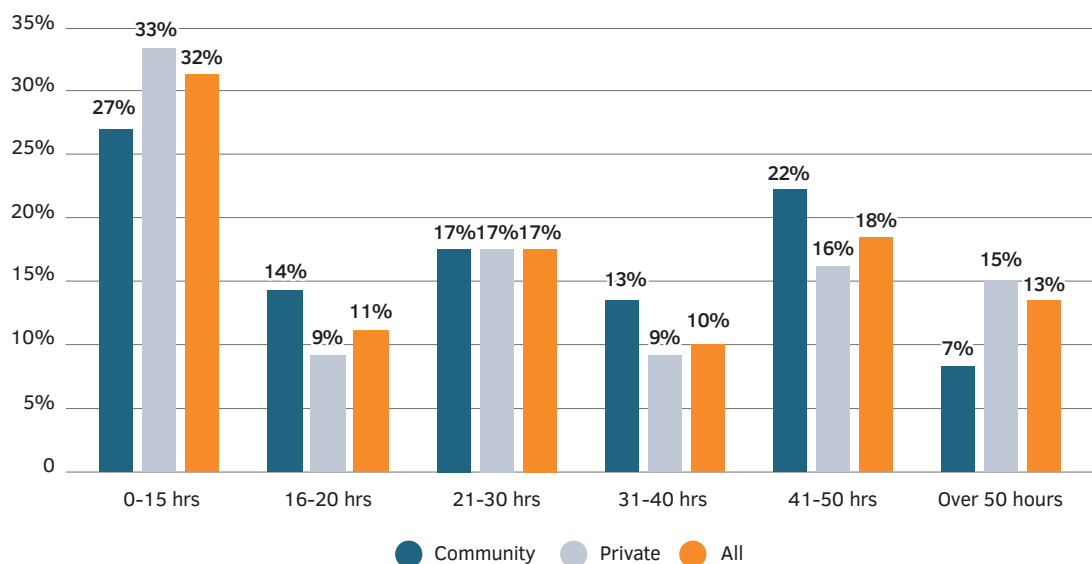
Figure 3.6 presents the percentage of services by number of operating hours services per week (out of term). Of the services that open out of term time, the majority (67%) operate over 40 hours per week. Private services are more likely to operate during these hours (77%) than their community counterparts (51%).

Figure 3.6 Percentage of services by number of hours services operate per week (out of term)
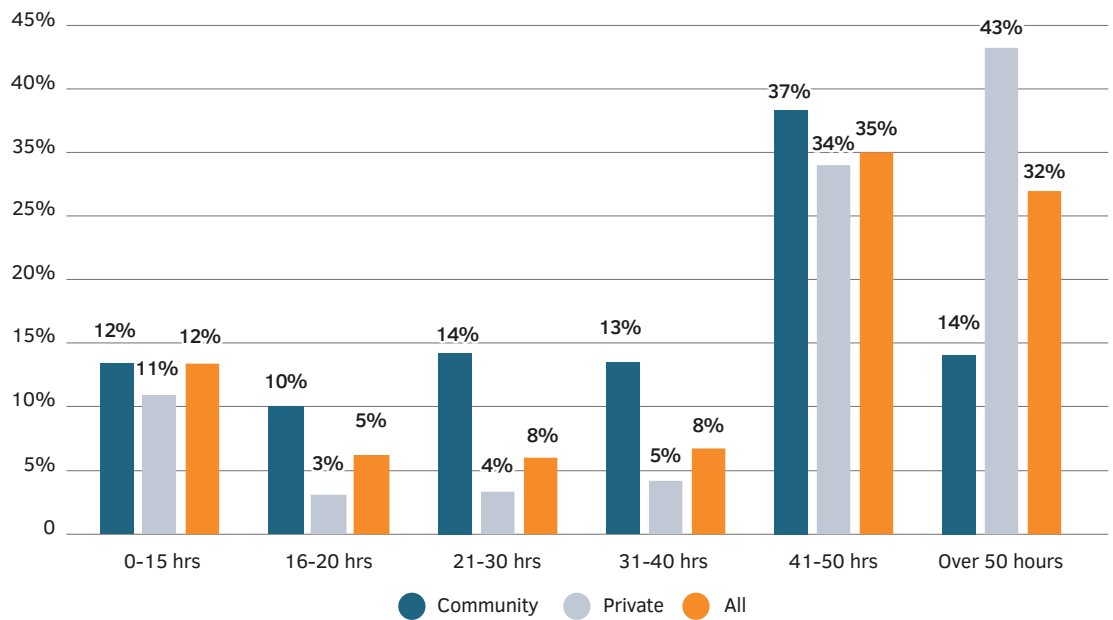
Over half of services (55%) are open for up to 38 weeks. Private services are more likely to open for a shorter number of weeks (62%) compared to community services (42%). Almost one third of services (30%) operate between 49 and 52 weeks per year with similar percentages across community and private services. For a detailed breakdown, see Figure 3.7.

Figure 3.7 Percentage of services by number of weeks per year services are operational
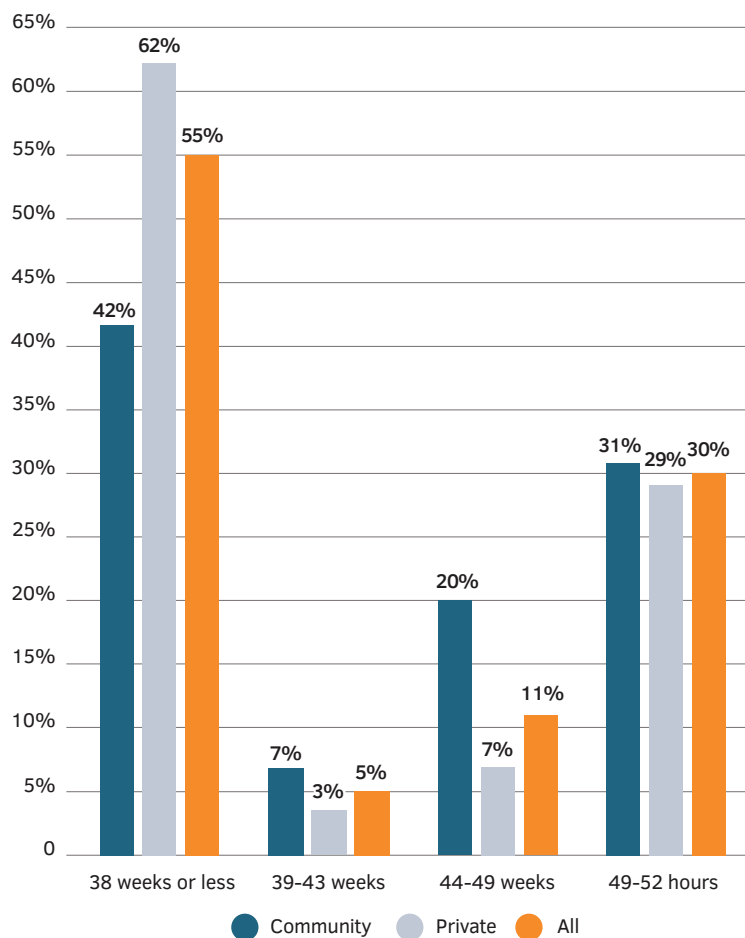
3.6   Commercial rates

One quarter of Early Learning and Care and School-Age Childcare services (25%) who responded to the service profile survey, were charged commercial rates in 2019/20. This is the lowest figure since 2013/14 and is likely linked to the suspension of rates due to COVID-19. Table 3.5 shows the percentage of services that have been billed for rates each year since 2013. In 2019/20 the proportion of services that were charged commercial rates was lowest since 2013.

Table 3.5 Percentage of services billed for rates between 2013/14 and 2019/20

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
% of Services billed for rates	26%	35%	32%	29%	31%	31%	25%

There are differences in respect of the types of services that reported as being billed for rates. As in previous years, private services (33%) and those in urban areas (30%) are more likely to be charged for commercial rates. This year only 7% of community services reported being billed for rates, this represents a significant decrease on the 2018/19 figure of 14%. A detailed breakdown is shown in Table 3.6.

Table 3.6 Percentage of services billed for commercial rates

Billed for rates	Community	Private	Urban	Rural	All
Yes	7%	33%	30%	16%	**25%**
No	93%	67%	70%	84%	**75%**
Total number of services	886	2,072	1,845	1,113	2,958[30]

Nationally, the average rate that services were billed for in 2019/20 was €4,546. This represents a reduction of 5%, from €4,785, in 2018/19[31]. The Local authorities have autonomy as to how they apply the levy and collect the rates[32], resulting in significant differences between counties.

Figure 3.8 shows the average value of commercial rates charged to ELC and SAC services at county level. The highest rates were charged in Limerick, Galway, Kildare, Kerry, and in Dublin local authority areas (South Dublin, Fingal, Dún Laoghaire-Rathdown and Dublin City). The average rates charged in Limerick was €8,315 compared to the lowest average county rate of €1,836 in Longford.

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30 2,964 services responded to the survey, 6 respondents left this question blank and are excluded from the total.

31 As in 2018/19 data cleaning took place to remove annual values of under €200.00.

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

Figure 3.8 County average of most recent commercial rates bill
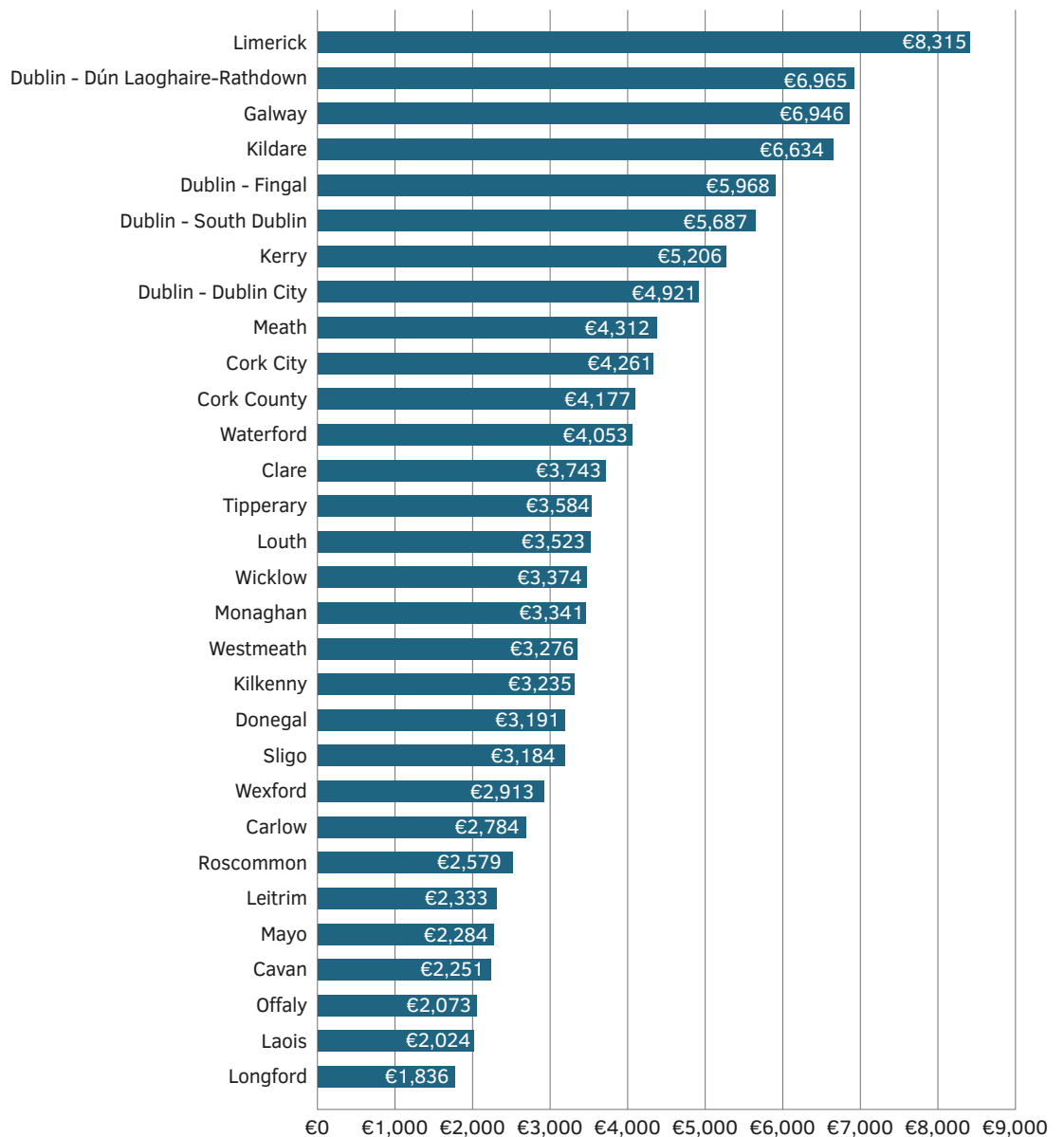
The level of rates charged varies also depending on the type of provider. Table 3.7 shows the changes in commercial rates (by bands) over the last three years by organisation type. Almost three quarters of services were charged rates of €5,000 or below in 2019/20, while 7% of services pay rates above €10,000. Community services[33] usually pay lower rates, with 46% paying less than €1,000, compared to only 15% of private providers. In 2019/20, the proportion of services paying higher rates (above €5,000) decreased to 25% from 30% in the previous year.

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

Table 3.7 Rates bills (in bands) by organisation type between 2017/18 – 2019/20

	Community			Private			All		
	2017/18	2018/19	2019/20	2017/18	2018/19	2019/20	2017/18	2018/19	2019/20
Under €1,000	44%	46%	46%	19%	16%	15%	22%	20%	19%
€1,000- €5,000	38%	35%	44%	53%	52%	57%	51%	50%	54%
€5,000 - €10,000	9%	13%	5%	17%	19%	22%	16%	18%	18%
Over €10,000	9%	7%	5%	11%	13%	7%	11%	12%	7%

3.7   Outdoor spaces
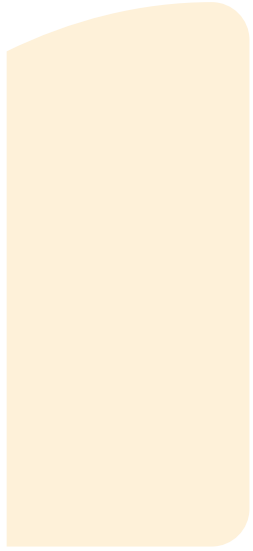
The vast majority of early learning and care and school-age childcare services (97%) reported having an outdoor space. This figure increased by 1% since 2018/19.

Figure 3.9 Percentage of services with an outdoor play area on their premises
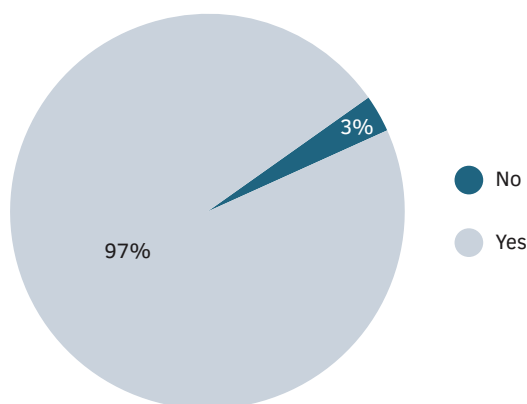
3.8   Services provided through the medium of Irish

In 2019/20, 8% of respondents (243 services) reported providing childcare through Irish. This is a slight decrease on last year (10%). Of the 243 services, 140 (58%) are private and the remaining 103 (42%) are community. Services providing Early Learning and Care and School-Age Childcare through the medium of Irish are more likely to be located in urban areas (53%) than in rural locations (47%).

4

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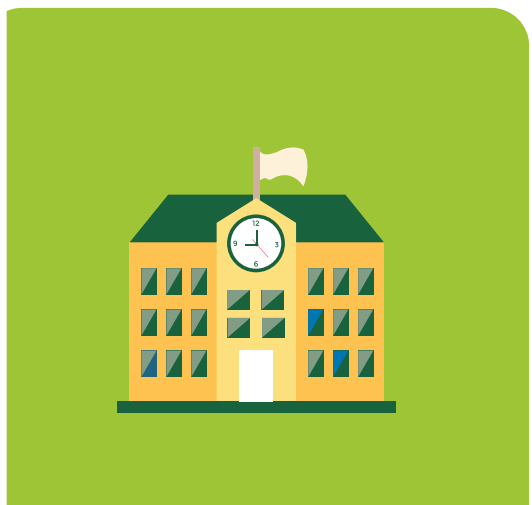
4.1   Introduction

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

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

4.2   Equality and diversity

4.2.1   One parent families

Over three quarters of survey respondents (77% or 2,283 services) reported having children attending who come from one parent families (see Table 4.1 and Table 4.2). This is up 2% on the previous year.

According to the most recent census data (2016) there were 218,817 one-parent families living in Ireland, with one in five (20%) of all children in Ireland belonging to one-parent families. In the 2019/20 service profile survey, services reported 16,585 one parent families availing of ELC and/or SAC services, of these, 46% (7,642) availed of ECCE, an increase of 2% on the previous year. Over half of one parent families (53%) availed of ELC and/or SAC services from community services which is a slight increase from 51% last year. This suggests that one parent families are more likely to use community services, with community services representing just 26% of all services nationally. The majority of children from one parent families attended services located in urban areas (80%). This suggests that one parent families are more likely to use services based in urban areas, with urban based services representing 65% of services nationally.

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

	Community	Private	All
Number of services with children from one parent families	765	1,518	**2,283**
% of services with children from one parent families	86%	73%	**77%**
Number of one parent families using ELC/SAC services	8,748	7,837	**16,585**
% of one parent families using ELC/SAC services	53%	47%	**100%**

Table 4.2 Number of ELC and SAC services in urban and rural areas with children from one parent families

	Urban	Rural	All
Number of services with children from one parent families	1,512	771	2,283
% of services with children from one parent families	82%	69%	77%
Number of one parent families using ELC/SAC services	13,197	3,388	16,585
% of one parent families using ELC/SAC services	80%	20%	100%

4.2.2 Children with neither English nor Irish as their first language

The survey responses reveal how ELC and SAC settings reflect the increasing diversity of Irish society, with linguistic diversity being one indicator thereof. As Table 4.3 and Table 4.4 show, 69% of services reported having at least one child for whom neither English nor Irish is a first language, one percentage point up on last year. These services in total reported 16,617 children belonging to this group. In addition, 10,187 (61%) children from this group availed of ECCE – a significantly higher proportion when compared to children from other target groups, with the exception of children with additional needs (also 61%).

Table 4.3 and Table 4.4 present the breakdown of services and children by facility type and location. Like in previous years, children for whom neither English nor Irish is a first language are more likely to attend services in urban locations (87%) and to use private services (66%). The distribution of these children in regard to the service type and location remained largely unchanged since last year.

Table 4.3 Number of children attending ELC and SAC services in community and private provision for whom neither English nor Irish is a first language

	Community	Private	All
Number of services with children with neither English nor Irish as their first language	629	1,424	2,053
% of services with children with neither English nor Irish as their first language	71%	69%	69%
Number of children with neither English nor Irish as their first language	5,692	10,925	16,617
% of children with neither English nor Irish as their first language	34%	66%	100%

Table 4.4 Number of children attending ELC and SAC in rural and urban areas for whom neither English nor Irish is a first language

	Urban	Rural	All
Number of services with children with neither English nor Irish as their first language	1,495	558	2,053
% of services with children with neither English nor Irish as their first language	81%	50%	69%
Number of children with neither English nor Irish as their first language	14,451	2,166	16,617
% of children with neither English nor Irish as their first language	87%	13%	100%

4.2.3   Traveller and Roma children

In the 2019/20 survey, 547 services reported having at least one Traveller child attending their service. This represents 18% of respondents, which is slightly higher than last year when it was 17%. In total, services reported 2,831 Traveller children attending[34].

Table 4.5 and Table 4.6 show the breakdown of Traveller children in services by organisation type and location. Like in previous years, the majority of Traveller children (59%) attended community services and those based in urban areas (88%). However, the proportion of Traveller children attending community services decreased by 11%, from 70% in 2018/19.

Table 4.5 Number of Traveller children in ELC and SAC services across community and private provision

	Community	Private	All
Number of services with Traveller children attending	270	277	**547**
% of services with Traveller children attending	30%	13%	**18%**
Number of Traveller children attending	1,665	1,166	**2,831**
% of Traveller children attending (as % of all Traveller children)	59%	41%	**100%**

Table 4.6 Number of Traveller children in ELC and SAC services in urban and rural areas

	Urban	Rural	All
Number of services with Traveller children attending	423	124	**547**
% of services with Traveller children attending	23%	11%	**18%**
Number of Traveller children attending	2,491	340	**2,831**
% of Traveller children attending (as % of all Traveller children)	88%	12%	**100%**

In 2019/20, 266 services reported having at least one Roma child attending their facility (9% of all survey respondents). In total, 1,208 Roma children were reported[35] to be enrolled in ELC services of whom 34% availed of ECCE (407).

Table 4.7 and Table 4.8 shows the breakdown of Roma children in services by organisation type and location. Like in previous years, the majority of Roma children were enrolled in private facilities (63%). The vast majority of Roma children (87%) attended services in urban areas.

Table 4.7 Number of Roma children attending ELC and SAC services across community and private provision

	Community	Private	All
Number of services with Roma children attending	104	162	**266**
% of services with Roma children attending	12%	8%	**9%**
Number of Roma children attending	451	757	**1,208**
% of Roma Children attending (as a % of all Roma children)	37%	63%	**100%**

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34 The number of Traveller children was not extrapolated to national levels this year, due to much lower survey response rate than in previous year, accuracy of such extrapolations could not be ensured.

35 The number of Roma children was not extrapolated to national levels this year, due to much lower survey response rate than in previous year, accuracy of such extrapolations could not be ensured.

Table 4.8 Number of Roma children attending ELC and SAC services in urban and rural areas

	Urban	Rural	All
Number of services with Roma children attending	225	41	**266**
% of services with Roma children attending	12%	4%	**9%**
Number of Roma children attending	1,054	154	**1,208**
% of Roma Children attending (as a % of all Roma children)	87%	13%	**100%**

4.3   Disability

4.3.1   Children with additional needs[36]

Survey respondents were asked to specify the number of children with additional needs attending their services. The breakdown by organisation type is presented in Table 4.9. Just under three quarters of services (74%) reported having at least one child with additional needs[37], this is down significantly from 85% in 2018/19. In comparison, 52% of all services in Ireland participate in the Access and Inclusion Model (AIM) (see Table 2.10). In total, services reported 8,370 children with additional needs attending their services in 2019/20.

Table 4.9 Number of children with additional needs attending ELC and SAC services by organisation type

	Community		Private		All	
	Services	Children	Services	Children	Services	Children
Number of services / children with additional needs	708	3,541	1,490	4,829	**2,198**	**8,370**

4.3.2 Children with a diagnosed disability

Survey respondents were also asked to provide further data on children with additional needs who had a diagnosis from the HSE. 1,801 or 61% of services have at least one child with a diagnosed disability, a higher proportion than in the previous year when it stood at 54%. Community services are more likely to cater for children with a diagnosed disability, with 70% of services having at least one child attending (620) compared to 57% (1,181) of private services.

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

Table 4.10 presents the breakdown of services and children by type of diagnosed disability and by organisation type. The biggest group of children had a learning disability (2,991), while the smallest group were children with physical disability (711), 2,349 children had more than one disability.

36 Children with additional needs can be described as those with a range of difficulties (such as a physical, emotional, behavioural, or learning disability or impairment) that causes an individual to require additional or specialized services or accommodations (such as in education or recreation). Source: https://www.merriam-webster.com/dictionary/special%20needs

37 This includes children with diagnosed and undiagnosed additional needs.

Table 4.10 Breakdown of services and children with a diagnosed disability attending ELC and SAC services by organisation type

Number of services and children with:	Community		Private		All	
	Services	Children	Services	Children	Services	Children
Physical disability	190	284	342	427	532	711
Sensory impairment	233	457	382	553	615	1,010
Learning disability	487	1,280	846	1,711	1,333	2,991
Other disability	201	439	369	646	570	1,085
More than one need	356	767	651	1,002	1,007	2,349

4.3.3   Wheelchair access

Over four in five services (81%) reported being wheelchair accessible. This figure is slightly higher to that recorded last year (78%). Community services were more likely to be wheelchair accessible (87%) than private providers (78%). Geographically, there are variations, with more services in rural areas (87%) than in urban areas (77%) having wheelchair access. The percentage of wheelchair-accessible premises ranges from below 69% in the Dublin South and Dublin Fingal local authorities to over 90% in counties Roscommon (90%), Kerry (91%), Donegal (92%) and Cavan (93%).

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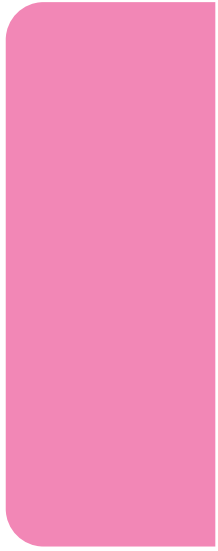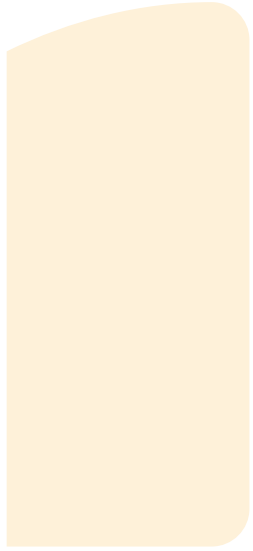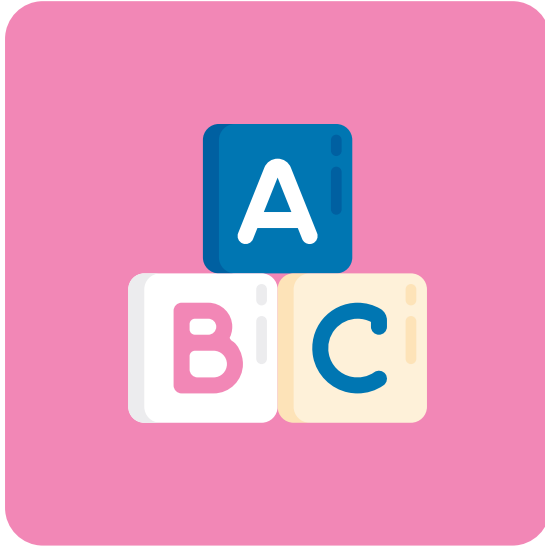
Early Learning and Care and School Age Childcare fees
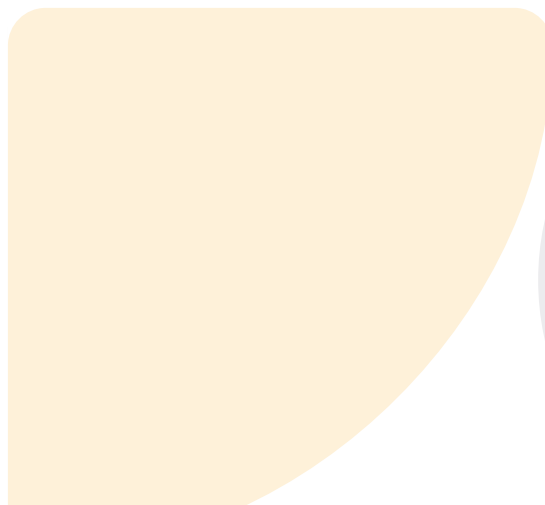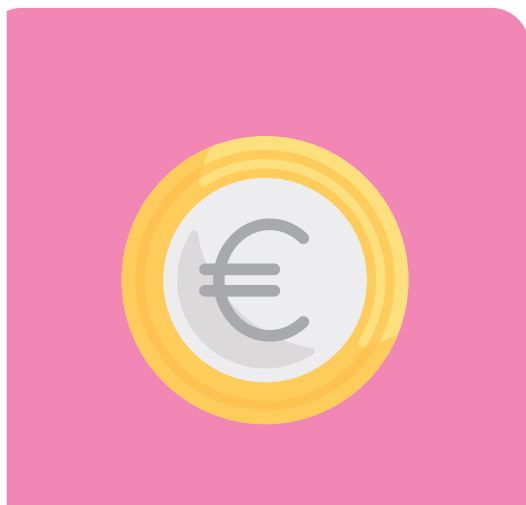
5.1   Introduction

This chapter provides an analysis of fees for ELC/SAC services across Ireland. As in previous years, the report breaks down and examines the factors influencing these fees. These factors include geography (the county or region where services are located), organisation type (community/ private), and the age of children availing of services, levels of affluence/deprivation of the area where services are located, and staff qualifications.

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

This report also presents the analysis of data on school-age childcare (SAC) fees (in term and out of term). This analysis is presented in section 5.8.

5.2   Overall national fees

In 2019/20, **the average weekly fee nationally**[38], per child, for **full day** was €**186.12**, for **part-time** was €**110.75** and for **sessional childcare** was €**73.90**. The fees for all types of provision increased slightly – less than 1% for each care type compared to 2018/19. This increase is in line with the December 2019 inflation rate for Ireland of 1.3%[39]. The level of change in average fees since last year is shown in Table 5.1, while Figure 5.1 presents the change in fees over the last eight years.

Table 5.1 The level of change in weekly fees between 2018/19 and 2019/20[40]

	2018/19	2019/20	Change from 2018/19	% Change
Full day	€184.36	€186.12	€1.76	0.95%
Part-time	€109.98	€110.75	€0.77	0.70%
Sessional	€73.30	€73.90	€0.60	0.82%

Figure 5.1 Average weekly fees since 2012 by type of childcare provision
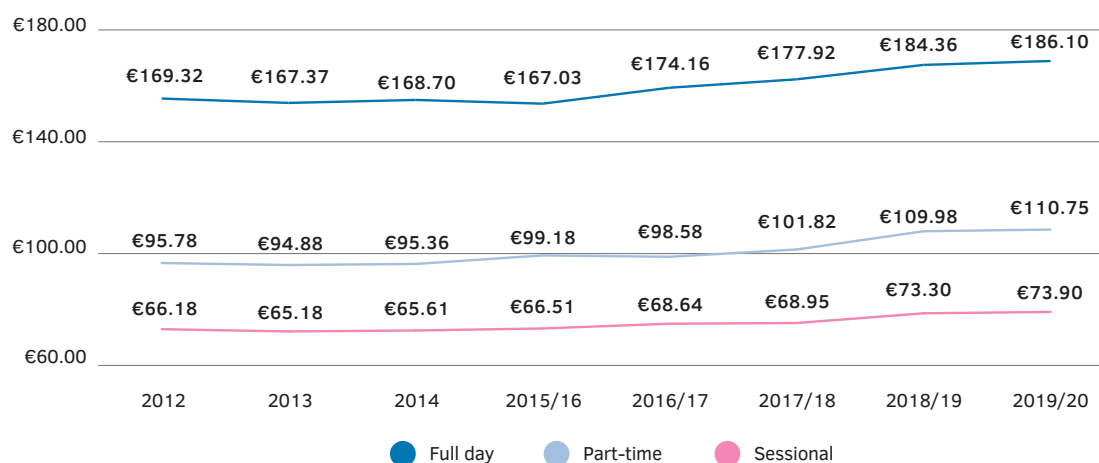
38 These averages are based on the median weekly fee values for each service. Median values are calculated using the fees provided for each session type – e.g. if the service provided six different fees for full day care (one for each age group), the median of these fees has been used.

39 https://www.cso.ie/en/releasesandpublications/er/cpi/consumerpriceindexmarch2021/

40 Full day places (more than 5 hours per day); part-time places (between 3hrs 31mins and 5 hours per day); sessional places (between 2hrs 16mins and 3hrs 30mins per day).

The average weekly fees for different types of provision vary depending on the age of the child. The amount of fees decrease as the child gets older, both for full day and part-time provision. The most expensive fees charged are for babies up to 1 year (€187.87 for full day and €116.31 for part-time care), while provision for children aged between 4+ to 5 years is the cheapest at €176.99 for full day care and €106.57 for part-time care. This varies from trends in previous years where fees were cheapest for the oldest age group (5 year+ to 6 years). The average sessional fees follow a different pattern. While sessional fees are also the highest for babies (up to 1 year), at €79.55, the lowest average sessional fees charged are for children aged 3+ to 4 years, at €72.92. The detailed breakdown of fees by age group is presented in Table 5.2.

Table 5.2 Average weekly childcare fees by age range of children and type of provision

	Full day	Part-time	Sessional
Up to 1 year	€187.87	€116.31	€79.55
1 year+ to 2 years	€183.17	€112.08	€77.58
2 years+ to 3 years	€180.54	€108.69	€74.40
3 years+ to 4 years	€177.72	€106.57	€72.92
4 years+ to 5 years	€176.99	€106.57	€73.46
5 years+ to 6 years	€177.87	€108.88	€75.76

5.3   Fees by location

The level of fees charged by services depends on their location of the service. Differences are observed between the counties and also within counties depending on the level of affluence or disadvantage of the community in which the service is located (see section 5.5 for details). Historically, fees are higher in urban areas, and along the eastern coast.

Table 5.3 presents average fees for full day, part-time and sessional provision by county. As in previous years, the highest fees for all types of provision were charged by services in Dún Laoghaire-Rathdown, where the average full-time fees in 2019/20 were €239.84 for full day, €135.33 for part-time and €85.71 for sessional care. The average fees charged by services in Dún Laoghaire-Rathdown have slightly decreased, by 3%, for full-time care when compared to the previous year. The difference in average fees charged across counties is significant. The average weekly full day fees in Dún Laoghaire-Rathdown are 59% higher than the average fees recorded for Monaghan (€150.46). The part-time fees are 54% higher in Dún Laoghaire-Rathdown than in Leitrim, where these are the lowest, at €84.60. The most expensive sessional fees (Dún Laoghaire-Rathdown) are 30% higher than in Monaghan (€65.93). In comparison to last year, the difference at the county level between the highest and lowest has decreased for full day average fees (66% in 2018/19) 60% to 54% for part-time and from 36% to 30% for sessional.

A detailed breakdown of fees by age range and type of provision at county level is included in Appendix 2.

Table 5.3 Average weekly fee by county and type of care provision (full day care, part-time care, and sessional)

County	Full day	Part-time	Sessional
Dublin – Dún Laoghaire-Rathdown	€239.84	€135.33	€85.71
Dublin – Fingal	€220.87	€127.91	€76.16
Dublin – South Dublin	€217.09	€127.13	€76.49
Dublin – Dublin City	€211.91	€126.37	€78.31
Wicklow	€203.58	€118.56	€78.12
Cork County	€202.30	€115.38	€77.22
Cork City	€198.28	€107.04	€76.29
Kildare	€195.00	€120.10	€77.95
Meath	€182.94	€106.97	€74.36
Kerry	€180.40	€100.01	€67.79
Westmeath	€176.61	€106.21	€72.99
Louth	€175.27	€109.43	€73.03
Limerick	€175.25	€102.50	€73.59
Wexford	€174.69	€105.71	€75.80
Offaly	€173.63	€112.85	€71.62
Clare	€173.37	€105.76	€71.43
Laois	€172.43	€109.56	€72.43
Kilkenny	€171.11	€105.78	€73.30
Donegal	€169.84	€104.66	€66.81
Waterford	€168.37	€100.52	€69.81
Cavan	€168.33	€97.94	€69.81
Galway	€168.05	€102.02	€70.76
Sligo	€164.02	€102.82	€75.55
Mayo	€162.31	€111.61	€69.11
Roscommon	€162.18	€93.72	€69.58
Longford	€159.09	€90.42	€70.53
Tipperary	€158.26	€100.12	€71.59
Carlow	€152.20	€88.29	€72.36
Leitrim	€151.88	€84.60	€66.60
Monaghan	€150.46	€87.59	€65.93
Average	€186.12	€110.75	€73.90

The median fee for full day care was €180, for part-time care €105 and for sessional care €72.50. It is worth noting both median and averages can mask significant variation within counties. For example, the highest full day care fee charged by an individual service was in Dublin City (€312.50), however, the lowest fee charged in the same location was €75. The highest part-time fee was also in the Dublin City region (€253.26) with the lowest part-time fee in the same region charged at €47.50.

Fees also differ between services located in urban and rural areas. Figure 5.2 presents the average fees charged by services depending on their urban/rural location. Across all types of provision, average fees are higher in services located in urban areas – 13% higher for full day care, 12% higher for part-time provision and almost 7% higher for sessional care.

In 2018/19, the fee increases in services located in urban areas were higher than those operating in rural areas. However, this year, fee increases in rural areas were higher than in urban areas. In rural areas services increased their fees for full day care by 3.3% on the previous year, compared to a 0.7% increase recorded for urban services. The level of increases for part-time and sessional fees was also higher in rural locations compared to urban areas, rural fees increased by 3.0% for part-time care and 2.7% for sessional childcare provision, compared to 0.2% increases for both of types of care in urban areas.

Figure 5.2 Average weekly fees for full day care, part-time care, and sessional provision by urban/rural location
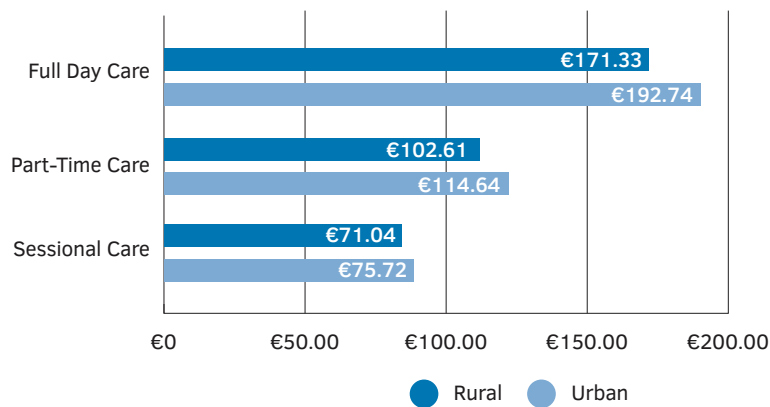
5.4   Fees by provider type

The average fees charged by private services tend to be higher than those charged by community settings across all types of provision. Figure 5.3 compares average fees charged by community and private providers. Average weekly fees charged by private providers in 2019/20 were 12% higher for full day, 28% higher for part-time and 16% higher for sessional provision. The gap in average fees charged by private and community services has slightly decreased, by 1% for full day and part-time care, and by 3% for sessional fees in comparison to 2018/19 figures.

Figure 5.3 Average weekly fees for full day care, part-time care, and sessional provision by organisation type
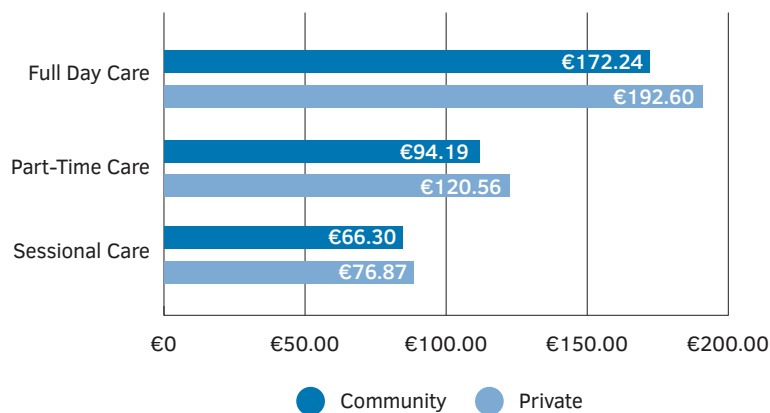
Compared to last year, the level of fee increases was higher for full day and part–time provision amongst community providers. Particularly noticeable was the increase in sessional fees, which rose by 3.2% in community services compared to 0.6% in private facilities (see Table 5.4).

Table 5.4 Percentage change in fees for full day care, part–time care, and sessional provision by organisation type, 2018/19 to 2019/20

Facility type	Full day	Part–time	Sessional
Community	2.4%	1.8%	3.2%
Private	1.0%	1.0%	0.6%

Table 5.5 presents the average fees charged by community and private services by age range. As expected, the fees are higher for all age groups and across all types of provision in private services. The biggest gap in fees charged between private and community services was for part–time provision for children aged up to 1 year, where fees charged were 55% higher in private services than community services. The smallest difference observed was around full day provision for 1+ to 2 years old, where the fees charged were only 7% higher in private services than community services.

Table 5.5 Average weekly fees by type of provision, age range of children and organisation type

Age range	Full Day		Part-time		Sessional	
	Community	Private	Community	Private	Community	Private
Up to 1 year	€175.63	€193.50	€87.88	€136.53	€65.16	€74.10
1 year + to 2 years	€175.87	€188.21	€86.20	€109.03	€64.80	€74.72
2 year + to 3 years	€169.09	€191.13	€94.04	€114.68	€66.97	€76.90
3 year + to 4 years	€173.07	€191.52	€96.95	€122.08	€70.19	€78.51
4 year + to 5 years	€173.00	€197.97	€95.87	€127.92	€63.97	€89.50
5 year + to 6 years	€171.11	€185.82	€96.98	€126.07	€68.45	€86.60

5.5   Fees by level of deprivation

The fees charged by services vary depending on the level of relative affluence/deprivation of the area where the service is located. Figure 5.4 presents average weekly full day, part–time and sessional fees by the level of affluence/disadvantage of the area where the service is located. To determine the level of affluence/disadvantage, the Pobal Haase–Pratschke Deprivation Index[41] was used. The index uses information from the Census of Population (2016), such as employment, age profile and educational attainment, to calculate an affluence/deprivation score for an area. The location of each ELC/SAC service was assigned an HP Deprivation Index score, based on the Electoral Division (ED) area in which it is located. Scores were grouped on a spectrum from disadvantaged to affluent (based on bands).

Overall, like in the previous years, services located in more affluent areas charged higher fees. The full day fees in affluent areas were 33% higher than those in the locations classified as disadvantaged. The part–time and sessional fees were, 33% and 21% higher, respectively, in affluent areas when compared to disadvantaged areas.

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41 For more information on the Pobal Haase–Pratschke Deprivation Index see:
    https://www.pobal.ie/app/uploads/2018/06/The-2016-Pobal-HP-Deprivation-Index-Introduction-07.pdf

Figure 5.4 Childcare fees for full day, part-time and sessional provision, by relative affluence/deprivation[42] of the area in which the service is located
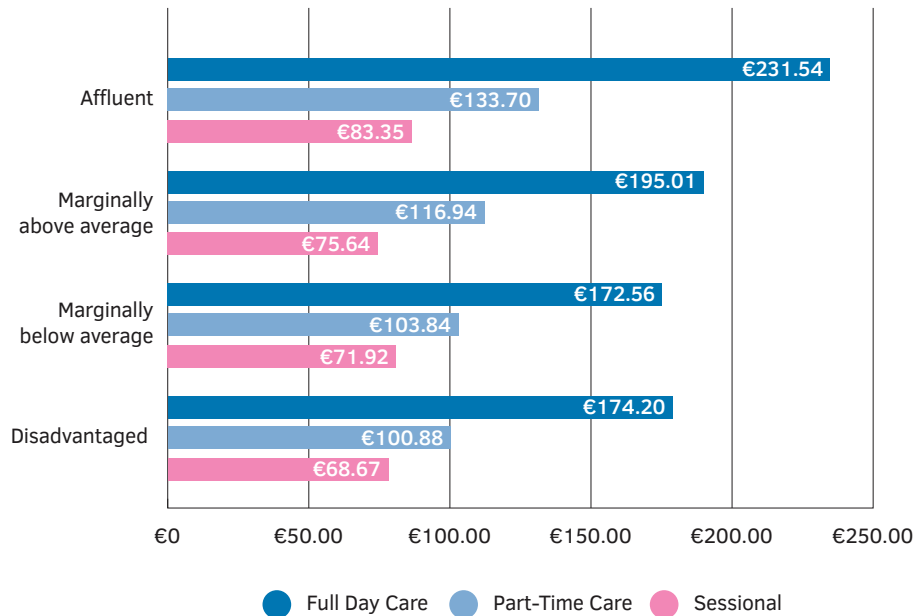
5.6   Fees by staff qualifications

An analysis was undertaken to investigate if fees are related to staff qualifications. This involved dividing services into five categories, based on the cost of full-time provision – ranging from the lowest 20% to the highest 20%. As each category had an equal number of services, no weightings were required. A scoring methodology was applied in order to take account of facilities having multiple staff with multiple qualifications. This involved assigning scores as follows: staff with no qualifications and those with qualifications below NFQ Level 5 were assigned a score of 0 (zero); those with NFQ Levels 5 and 6 were assigned a score of 1; and those with NFQ Levels 7 and above were assigned a score of 2. The same methodology was applied in 2018/19.

The findings, as presented in Figure 5.5, indicate a relationship between fees and staff qualifications. Overall, the 60% of services with the highest fees also have the more qualified staff than the remaining 40% with the lowest fees. However, this relationship for the three upper quantiles is not linear, as was the case in previous years, i.e. the staff in services in the middle quantile (40-60%) have higher qualifications than those working in the quantile with services with the second highest fees.

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

Figure 5.5 Qualification score of full-time staff working directly with children by quintile of service fees, between 2016/17 and 2019/20
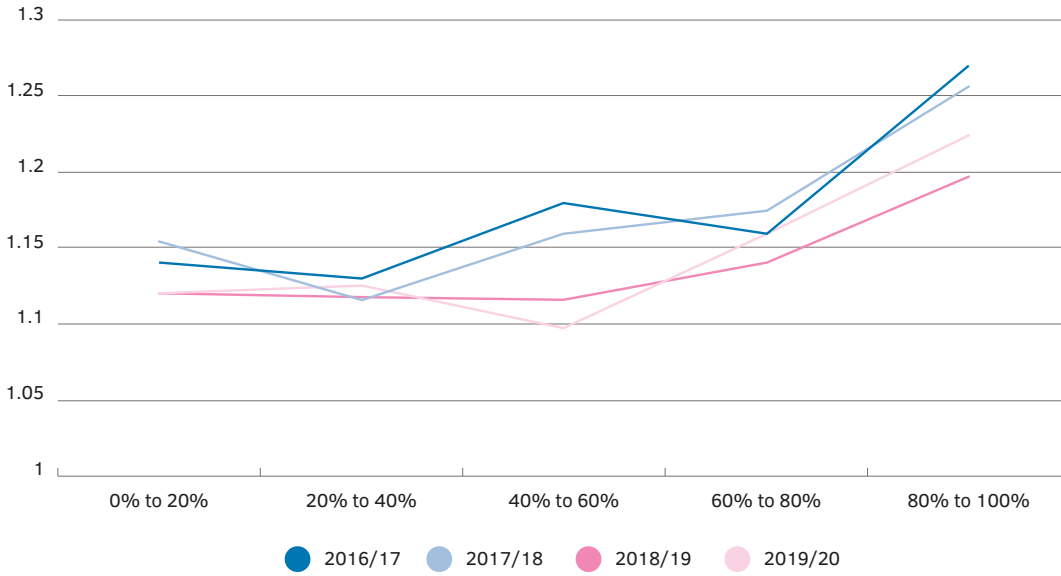
5.7   School-age childcare fees

The respondents in the 2019/20 service profile survey were asked whether they offer school-age childcare (SAC), both in term and out of term, and if yes, they were asked to indicate fees they charge (hourly for in term and weekly for out of term). Table 5.6 presents the average school-age childcare fees for in term and out of term services across counties. These are discussed in more detail in subsequent sections.

Table 5.6 School-age childcare fees by county

Region	SAC in term average hourly fee	SAC out of term average weekly fee
Dublin – Dún Laoghaire-Rathdown	€6.34	€191.72
Dublin – Fingal	€5.86	€177.85
Dublin – South Dublin	€5.65	€155.40
Meath	€5.58	€172.23
Dublin – Dublin City	€5.46	€148.66
Wicklow	€5.45	€160.99
Kilkenny	€5.43	€145.64
Clare	€5.41	€159.04
Kildare	€5.40	€167.61
Cork County	€5.36	€182.08
Westmeath	€5.33	€158.41
Limerick	€5.29	€131.81
Offaly	€5.25	€152.24
Waterford	€5.23	€108.33
Galway	€5.16	€147.73
Sligo	€5.16	€144.19
Tipperary	€5.16	€135.39
Cork City	€5.15	€147.09
Louth	€5.10	€156.75
Donegal	€5.09	€157.44
Cavan	€5.03	€155.94
Carlow	€4.96	€125.83
Kerry	€4.91	€133.99
Wexford	€4.90	€137.59
Monaghan	€4.76	€124.23
Roscommon	€4.69	€155.12
Longford	€4.62	€124.50
Laois	€4.60	€148.40
Mayo	€4.57	€130.60
Leitrim	€4.29	€121.10
National average	**€5.24**	**€151.39**

5.7.1   School-age childcare fees: in term

The average (mean) hourly fee for school-age childcare in term nationally was €5.24[43], while the median was €5 per hour. These averages are the same as the 2018/19 figures. Like in the case of full day, part-time, and sessional fees, school-age childcare fees in term were higher in private services (€5.64 per hour) than in community settings (€5.16) and in urban locations (€5.54) than rural ones (€5.38). The highest average fee of €5.99 was charged by services located in affluent areas, while services in disadvantaged areas charged on average €4.97 per hour. The highest average hourly fee for in term school-age childcare was in Dublin – Dún Laoghaire-Rathdown at €6.34 per hour, while the lowest average fee was in Leitrim, at €4.29 per hour.

The majority of ELC and SAC providers (65%) charged €5 or less. 7% of services charged over €10 per hour, an increase of 5% on the 2018/19 figures when only 2% of services charged more than €10 per hour. School-age childcare in term is much cheaper in rural areas, where almost three-quarters of services (74%) charged €5 or less per hour compared to only 59% of urban services.

### 5.7.2   School-age childcare fees: out of term

The average (mean) weekly fee for school-age childcare out of term nationally was €151.39[44] (a 6% increase on last year's figure of €143.02). The median remained the same as in 2018/19 at €150. Like with all the other types of fees, school-age childcare out of term fees were higher in private services (€144.79) than community settings (€104.46). Average weekly fees were slightly higher in rural areas than in urban areas (€132.41 and €130.02 respectively). However, while the difference between weekly fees in private and community services was €40.33 (39%), a large increase on the 25% difference in 2018/19, the gap between rural and urban services was only just over €2 (2%).

Similar to the trends observed in relation to ELC fees, there was a notable difference between out of term fees charged for school-age childcare depending on the affluence/deprivation levels of the area where service was located. On average, services in affluent areas charged almost €55 per week (€154.01) more than those in disadvantaged areas (€99.02).

The highest average weekly fees for out of term school-age childcare at regional level were in Dublin – Dún Laoghaire-Rathdown (€191.72), while the lowest fees were in Leitrim (€121.10).

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43 As part of the data cleaning process, 29 records (values of €15 per hour or over) were excluded as top range outliers.

44 Data cleaning involved, first, excluding all fees that were largely distant from the median of the relevant ratios and, second, remodelling values that appeared to be daily values into weekly fees.

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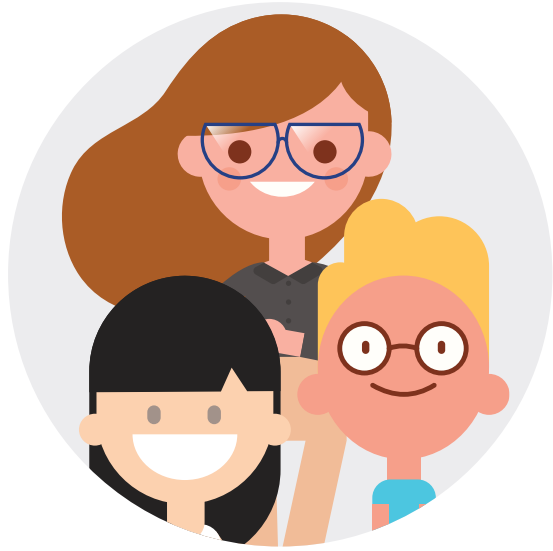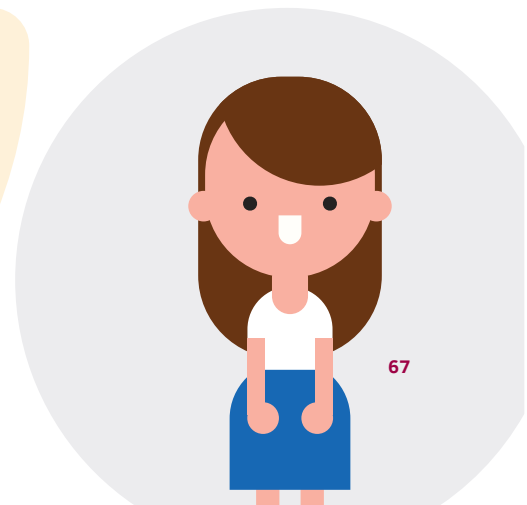
Staff

6.1   Introduction

This chapter provides an analysis of the service profile survey data on staff who work in Early Learning and Care (ELC) and School-Age Childcare (SAC) services. It includes information on those who work directly with children as well as managers and ancillary staff[45]. This service profile survey data is the most comprehensive dataset currently available in respect of the ELC and SAC workforce in Ireland and includes information on staff working in 2,935[46] ELC and SAC services.

6.2   Staff numbers

Services reported that there were 19,820[47] staff working in ELC and SAC services in 2019/20. This includes staff working directly with children (16,875 or 85%) and ancillary staff (2,945 or 15%), who work in areas such as management, administration, catering and maintenance. **When these figures are extrapolated, it is estimated that a total of 30,883 staff were working in the sector across Ireland at the time of the survey, which is an increase of 0.3% on 2018/19.** The estimated number of staff working with children has decreased on the previous year by 588 staff or 2%.[48] Figure 6.1 shows the number of staff (extrapolated) over the last five years, for both staff working with children and those in ancillary roles.

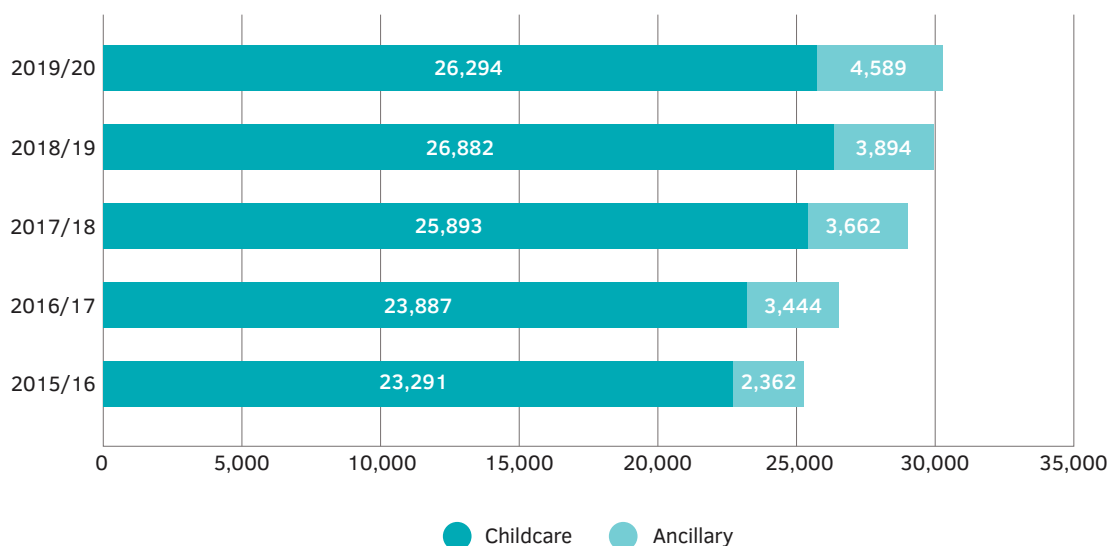Figure 6.1 Total number of staff in ELC and SAC services (extrapolated figures)

For the first time, services were asked to report on all managerial staff collectively (those working directly with children and those who were not). They reported that 4,122 staff worked as managers, representing 21% of all staff. For the purposes of this report, managers working with children were included in the analysis of staff working with children for the majority of characteristics. Also, the analysis of all managers, as a cohort, are included in section 6.3.

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

46 A number of services did not include details for staff or as a result of data cleaning had to be removed or were not included in specific analysis due to missing details.

47 Job titles were missing for eight childcare staff members and classification for managers working with children was missing for five staff, so therefore not included in this figure.

48 This decrease may be partially associated with the change in the data collection methodology. In previous years, services were asked to provide staff details under two categories: staff working with children and ancillary staff. In 2019/20, the third category of managers was introduced and services were asked to indicate whether manager worked with children.

6.3   Managerial staff – key characteristics

The majority of all managers (56% or 2,287) are owner-managers, with 44% of managers being employed by the service (or 1,830).

Of the 4,117 managers[49], over three quarters (3,192[50] or 78%) were reported as working with children and 925 (22%) were reported not working with children (Figure 6.2). A higher proportion of owner-managers reported that they work with children (84%) compared to managers employed by the service (73%).

Figure 6.2 Proportion of managerial staff by manager type and whether they work with children[51]
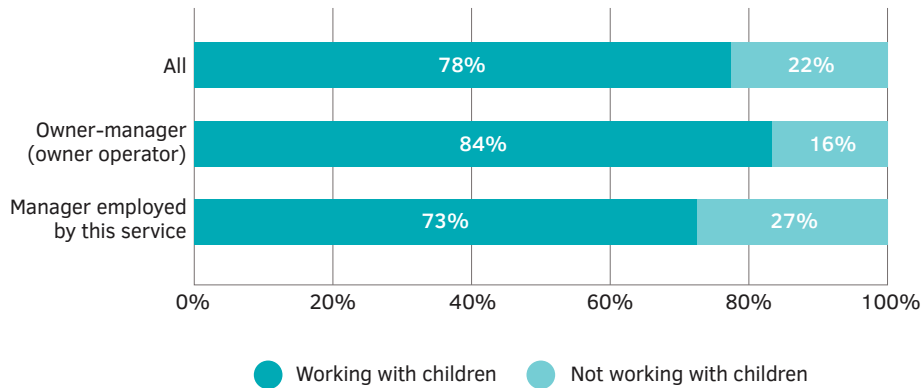
The majority of all managers work in private services (72%) compared to those in community services (28%) In comparison, 60% of all staff work in private services and 40% work in community services. Managers are almost twice as likely to work in urban services (66%) than in rural settings (34%). This breakdown corresponds with the overall breakdown of staff by organisation type and location.

Over half of all managers (54%) were working in their current service for over 10 years while 72% were working in the ELC and SAC sector for over 10 years. The proportion of all staff working with children (including managers) working for over 10 years, in their current service was 24%, and 34% in the early years sector. Managers were more than twice as likely to be working in the sector for 10 years or more than other staff working with children.

The vast majority (95%) of all managerial staff have an ELC qualification at NFQ Level 5 or higher (see Figure 6.3). This is the first time services were also asked to include ELC qualification details for managerial staff not working with children. There are a higher proportion of managers working directly with children that have an ELC qualification at NFQ Level 5 or higher (98%) compared to managers not working with children (85%).

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49 Five managerial staff were not included, as it was not indicated if they were working with children.

50 Two staff in the managerial staff section who worked with children were missing a job title, therefore, were excluded from analysis in section 6.12.1.

51 The information on whether they are owner-manager or employed by a service was missing for five managers.

Figure 6.3 Highest level of ELC qualification for managerial staff
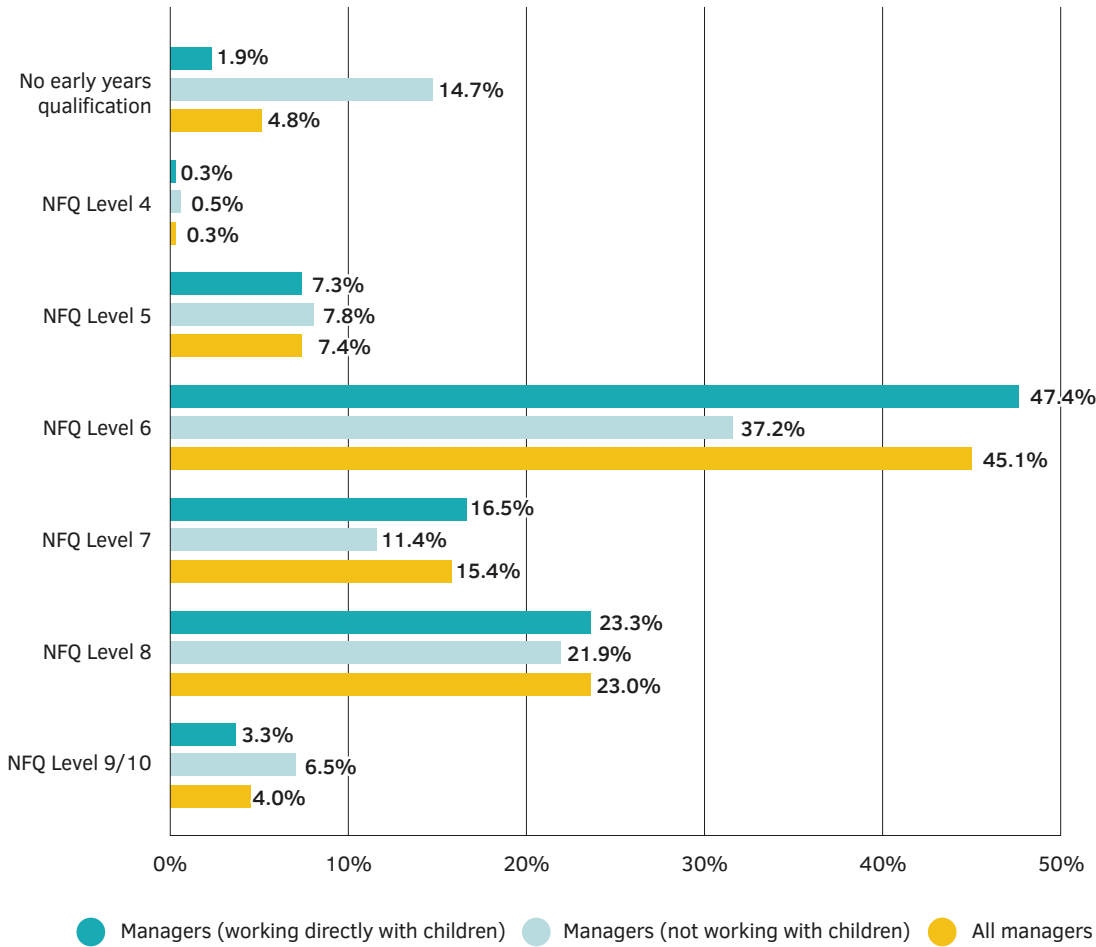
Services were also asked to indicate if managerial staff were in the process of attaining an ELC. A total of 414 managers were doing so (10% of all managerial staff). The majority of managerial staff (96%) studying for early learning and care qualifications planned to obtain an award at NFQ Level 6 or above.

Services were asked to report if managers held any relevant qualifications that were not in the area of ELC and 29% of staff were reported as having such qualifications. Over half of those managers were recorded as having another qualification (58%), while 18% were reported as having a business qualification, see Figure 6.4.

Figure 6.4 Proportion of managers with an additional relevant qualification
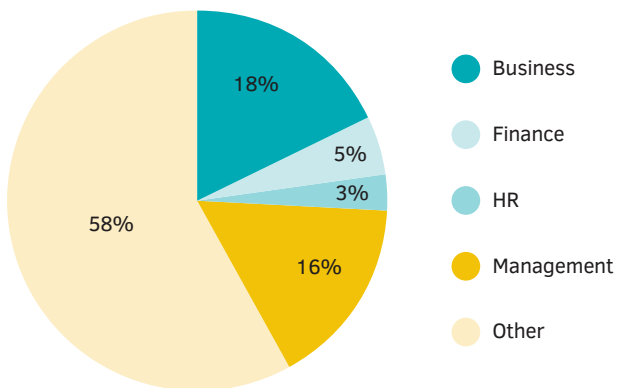
The vast majority (80%) of managers acquired these qualifications at NFQ Level 6 or above[52], see Figure 6.5.

Figure 6.5 Additional qualification level details for managerial staff
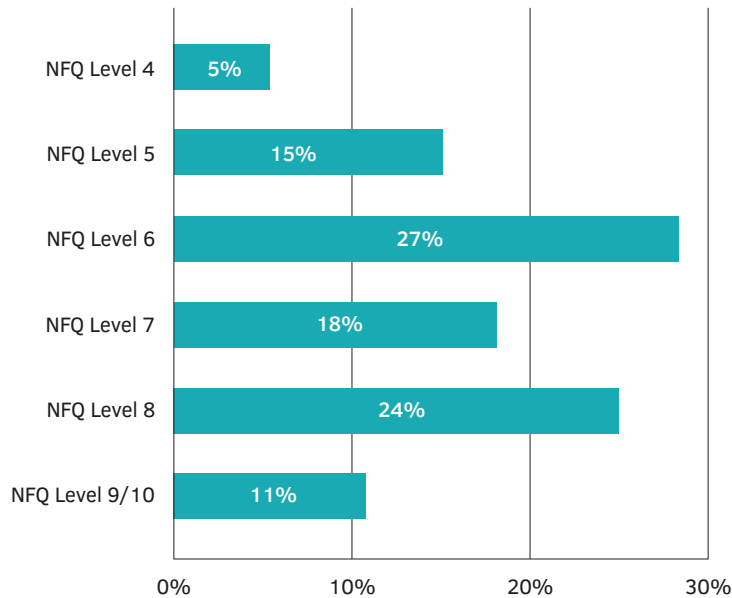
6.4   Relief staff – key characteristics

Services were asked to report on relief staff working with children, for the third year in a row. In 2019/20 they reported that 644 staff worked in a relief capacity representing 3.7% of those working directly with children. For the purpose of this report, relief staff working with children were excluded from the analysis of the majority of characteristics, as some of them may work in multiple services and may have, therefore, been reported more than once in the survey (by different services).

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

Relief staff share some characteristics with the other staff who work directly with children. As a cohort, they are marginally more likely to work in community services (40%) and rural areas (34%) compared to other staff working with children – 38% work in community services and 32% do so in rural areas (see Table 6.1).

Table 6.1 Number and percentage of relief staff and other staff working directly with children by urban/rural location and organisation type

|	Community		Private		Urban		Rural		All staff
	Number	%	Number	%	Number	%	Number	%	Number
Relief staff	255	40%	389	60%	428	66%	216	34%	**644**
All other staff working directly with children	6,362	38%	10,513	62%	11,406	68%	5,469	32%	**16,875**

Relief staff tend to have less experience in the sector, with 16% having over ten years' experience, while the corresponding figure for all other staff is 34% (see Figure 6.11). The vast majority of relief staff (84%) have an NFQ qualification at Level 5 or higher, although this is lower than for all other staff working directly with children (94%) (see Figure 6.6).

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52 If a manager had more than one non-ELC qualification, services were asked to select the one with the highest NFQ level.

Figure 6.6 Comparison of highest level of qualification for staff working directly with children and relief staff
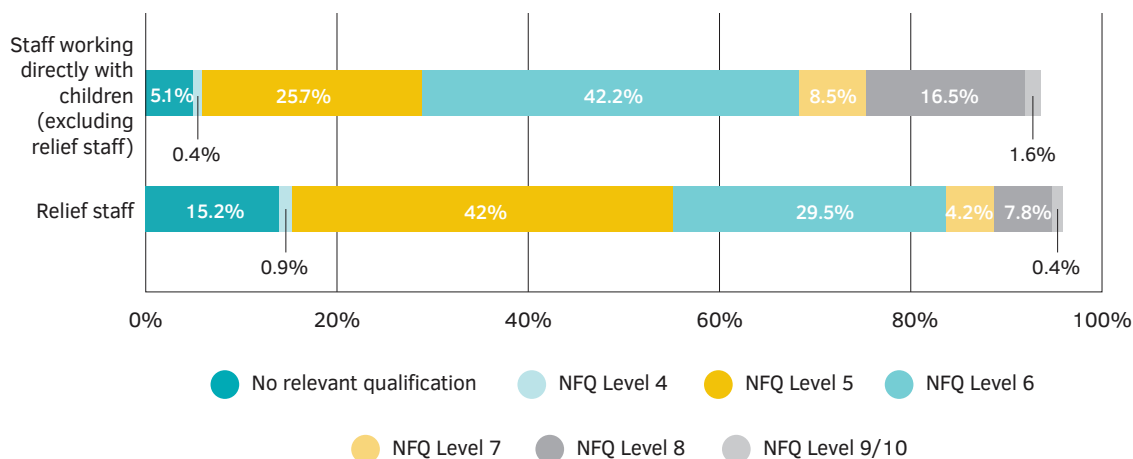
Relative to other staff working with children, relief staff are almost twice as likely to be assigned to work with children aged five years and over. They are also marginally less likely to work with babies (see Table 6.2).

Table 6.2 Proportion of staff working directly with children of each age cohort

	Up to 1 year	1+ to 3 years	3+ to 5 years	5+ years
Relief	2%	34%	43%	21%
All	5%	23%	61%	11%

6.5 Places of employment

Table 6.3 provides a breakdown of the numbers of staff working in community/ private and urban/ rural services. The majority of staff (60%) work in private services and in urban locations (68%). However, these figures are not proportional to the breakdown of services (who responded to the survey), as 70% are private (see section 1.3.1.3) and 62% are located in urban areas. This indicates that community services and those in urban areas tend to be larger.

This year, the average number of staff per service was 6.8, a decrease on the corresponding figure for 2018/19, which stood at 7.0. Community services are, on average, larger than private services with community services employing on average 8.9 staff compared to an average of 5.8 staff in private services. Services in urban areas have an average of 7.4 staff members, while in rural areas the corresponding figure is 5.7. Across all services, an average of 5.7 staff members work directly with children, with one staff position encompassing on average across the various ancillary roles.

Table 6.3 Number of services and staff by organisation type and urban/rural location including average number of staff per service[53]

Services	Total number of services	Staff working directly with children		Ancillary staff		All staff	
		Number of staff	Average per service	Number of staff	Average per service	Number of staff	Average per service
All	2,935	16,875	5.7	2,945	1	19,820	6.8
Community	882	6,362	7.2	1,478	1.7	7,840	8.9
Private	2,053	10,513	5.1	1,467	0.7	11,980	5.8
Urban	1,831	11,406	6.2	2,132	1.2	13,538	7.4
Rural	1,104	5,469	5	813	0.7	6,282	5.7

53 29 services who did not report having staff / staff were removed during data cleaning have been excluded. Five managerial staff were not included, as it was not indicated if they were working with children.

6.6   Category of employment

Similar to 2018/19, the vast majority of staff were direct employees (93%). This proportion is lower in community services, where directly employed staff accounted for 83% of all employees. In comparison, almost all staff in private services (99%) were directly employed. Table 6.4 presents the breakdown of staff in community and private services by employment type.

The breakdown of other employees, i.e. those on employment schemes or other government-funded programmes, is similar to last year, with the Community Employment (CE) programme accounting for the largest proportion (5% of all staff). One in six staff in community services are working as part of an employment scheme/government funded programme. Community Employment (CE) accounts for the largest proportion (74%) of all scheme/programme staff. Smaller proportions of staff (26% of scheme/programme staff and 2% of all staff) are recruited through other schemes or programmes, including the Community Service Programme (CSP), the Job Initiative Scheme (JI), JobsPlus, Tús and the Youth Employment Support Scheme (YESS). The higher numbers of staff on schemes/ programmes in community services is associated with the fact that community services can access a wider range of employment schemes/programmes.

Table 6.4 Number of staff working in ELC/SAC services by type of employment[54]

	Community	Private	Total	% of total staff
Number of services	**875**	**2,044**	**2,919**	**N/A**
Directly employed staff	**6,104**	**11,285**	**17,389**	**93%**
Staff on schemes/programmes	**1,241**	**73**	**1,314**	**7%**
CE – Community Employment*	970		970	**5.2%**
CSO - Community Services Programme*	162		162	**0.9%**
JI – Job Initiative Scheme*	44		44	**0.2%**
JobsPlus	3	63	66	**0.4%**
Tús*	62		62	**0.3%**
YESS – Youth Employment Support Scheme		10	10	**0.1%**
Total staff	**7,345**	**11,358**	**18,703**	**100%**

*These schemes are in community services only.

6.7   Contract type

Respondents were asked to state the contract type for staff members who work with children[55]. The majority of such staff have a permanent contract (76%). In comparison, nine out of ten employees in Ireland had a permanent contract in Q1 2020[56]. A slightly higher proportion of those working in private services and those located in urban areas has a permanent contract (78%), see Table 6.5.

Table 6.5 Breakdown of staff working directly with children (excluding managers) contract types by urban/rural location and organisation type

	Permanent	Temporary
Community	73%	27%
Private	78%	22%
Urban	78%	22%
Rural	73%	27%
All	**76%**	**24%**

54 Category of employment was not indicated for 1,117 staff.

55 This was collected for childcare staff only.

56 https://www.cso.ie/en/releasesandpublications/er/lfses/lfsemploymentseriesq12020/

Early years assistants are less likely to have a permanent contract than room leaders, with 65% of early years ECCE assistants having a permanent contract compared to 85% of room leaders (ECCE). Staff working with non-ECCE children, both early years assistants and room leaders are more likely to have a permanent contract compared to their ECCE counterparts, see Figure 6.7 for details.

Figure 6.7 Breakdown of staff working directly with children (excluding managers) contract types by job title
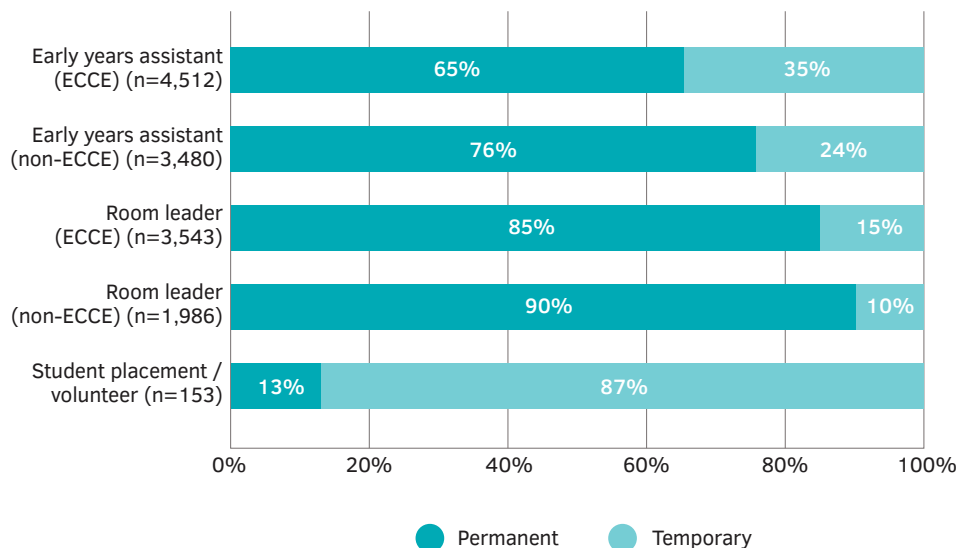
6.8   Contact hours worked per week

Respondents were asked to state the average number of contact[57] hours worked for each staff member working with children. A third of staff (33%) worked over 30 contact hours per week in 2019/20. Figure 6.8 shows the percentage of staff by organisation type and a range of contact hours worked. Overall, staff working in private services work longer hours, with 27% working 36 hours or more compared to 16% staff in community services.

Figure 6.8 Percentage of staff working directly with children by average number of contact hours per week

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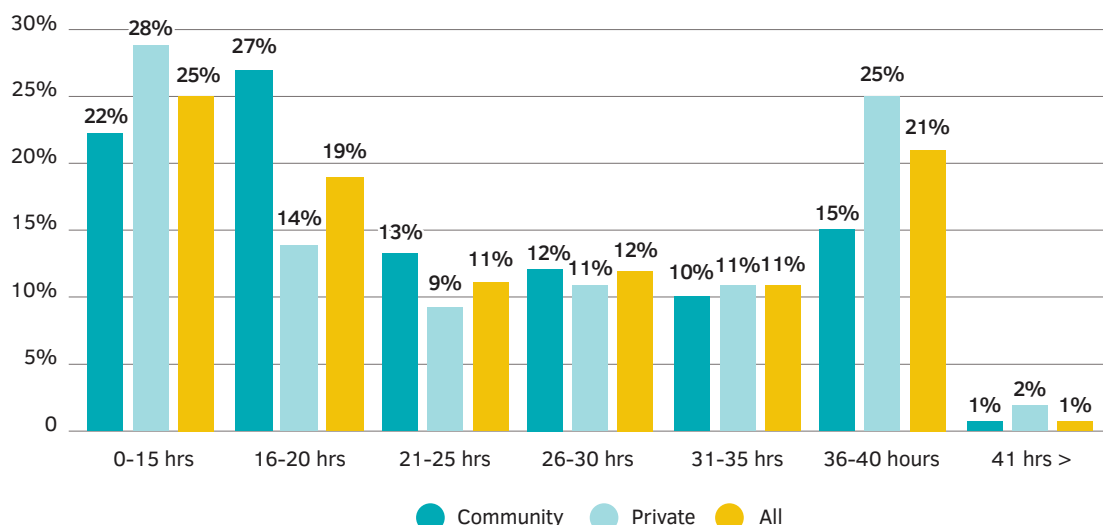
57 Contact hours are those used for working directly with children.

6.9   Non-contact hours per week

Respondents were asked to indicate the number of non-contact hours[58] worked per week for each staff member who works directly with children. As can be seen from Figure 6.9, the largest percentage of staff work between one and five non-contact hours (69%). This is higher for staff in community services (77%) compared to private services (63%). Compared to the previous year, staff have worked more non-contact hours in 2019/20, with 1% increases in the proportion of staff working 11-15 hours, 16-20 hours, 21-25 hours and 26-30 hours.

Figure 6.9 Percentage of staff working directly with children who work non-contact hours, per week
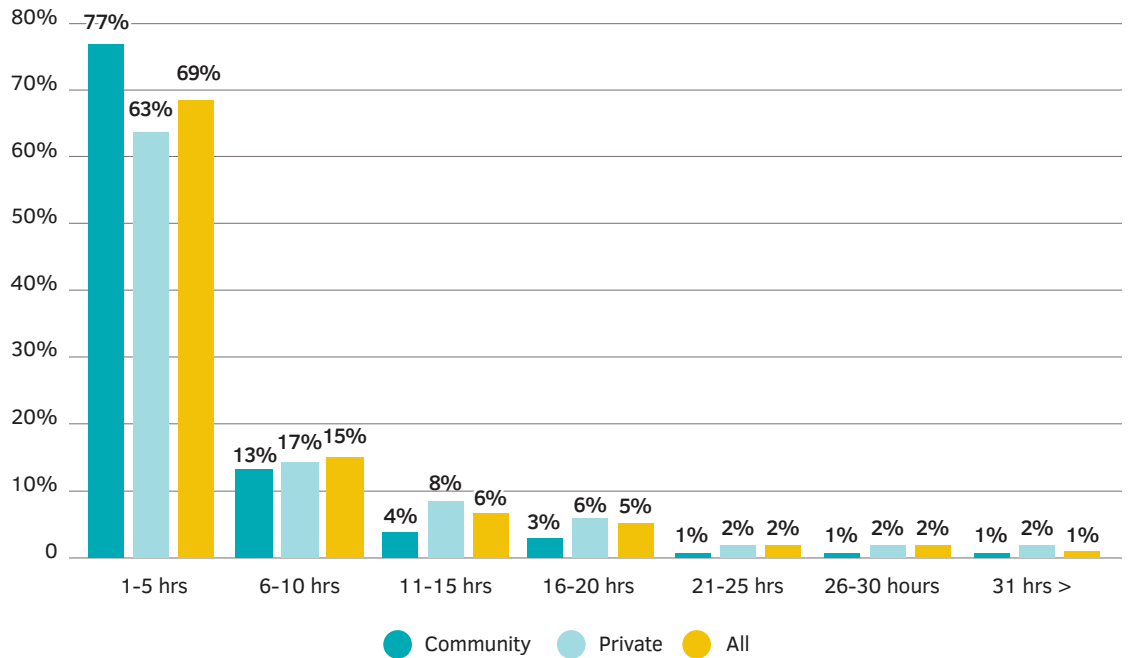
6.10   Length of time in service

Respondents were asked to indicate how long each staff member working with children had worked in their current service. As shown in Figure 6.10, the majority of employees (55%) had been in their current service for less than five years. Almost a quarter of staff (24%) were in their current service for over ten years, which is 3% more than last year. 66% of staff have been in their current service for longer than 2 years.

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

Figure 6.10 Breakdown of staff working directly with children by length of time in current service[59]
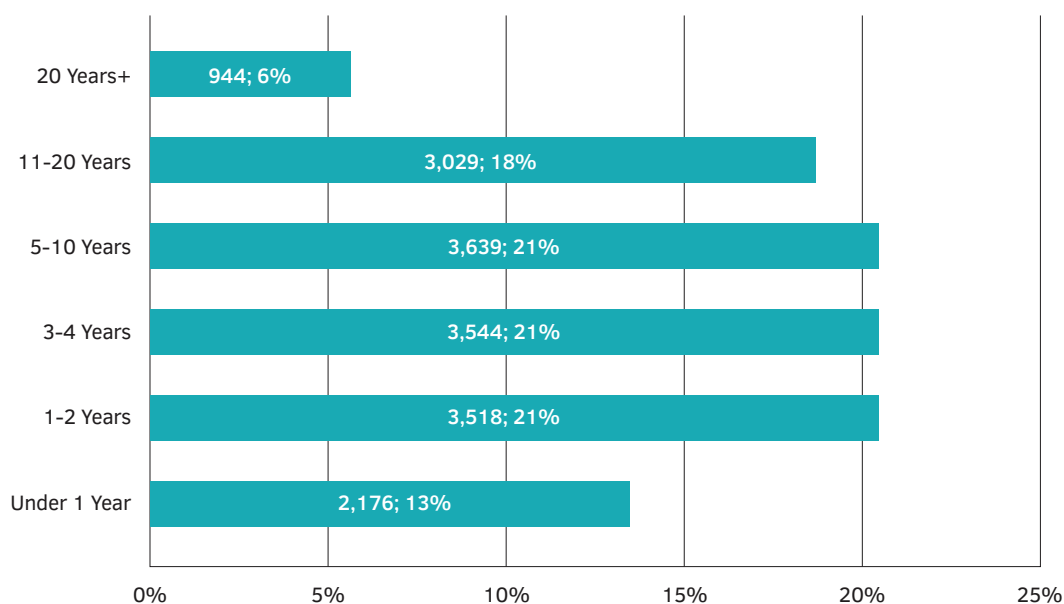
The length of employment in a service for staff working directly with children is broadly similar across urban and rural locations (for a detailed breakdown, see Table 6.6). This was also the case in 2018/19. More pronounced differences in the length of staff employment in the service were observed between community and private services. On average, staff in community services have been working for longer in the service than their counterparts in private facilities. For example, almost half of staff in community settings (49%) have worked there for five years or more, compared to 43% of staff in private services.

Table 6.6 Breakdown of staff working with children by length of time in current service by organisation type and urban/rural location[60]

	Community	Private	Urban	Rural	Total
Number of staff	6,355	10,495	11,389	5,461	16,850
Under 1 year	11%	14%	13%	12%	**13%**
1-2 years	20%	22%	21%	20%	**21%**
3-4 years	20%	21%	21%	21%	**21%**
5-10 years	23%	21%	21%	22%	**21%**
11-20 years	22%	16%	18%	19%	**18%**
20 years +	4%	6%	6%	6%	**6%**

59 The data was not available for 25 staff.
60 The data was not available for 26 staff.

6.11　Length of time working in the ELC and SAC sector

Respondents also provided data on the length of time that staff had been working in the sector. The data shown in Figure 6.11 indicates that there is inter-service mobility within the sector, as personnel move from one service to another. Among all staff, just 4% were new entrants (i.e. they entered the sector within the past year), 2% less than in 2018/19. However, 13% of staff were with their current service for less than one year, indicating that most of new staff in services have moved from another setting. At the other end of the spectrum, 34% of staff were in the ELC/SAC sector for over ten years, with 10% of staff having over twenty years of experience. These figures are similar to those recorded in previous years.

Figure 6.11 Staff working directly with children by length of time in current service and the ELC/SAC sector
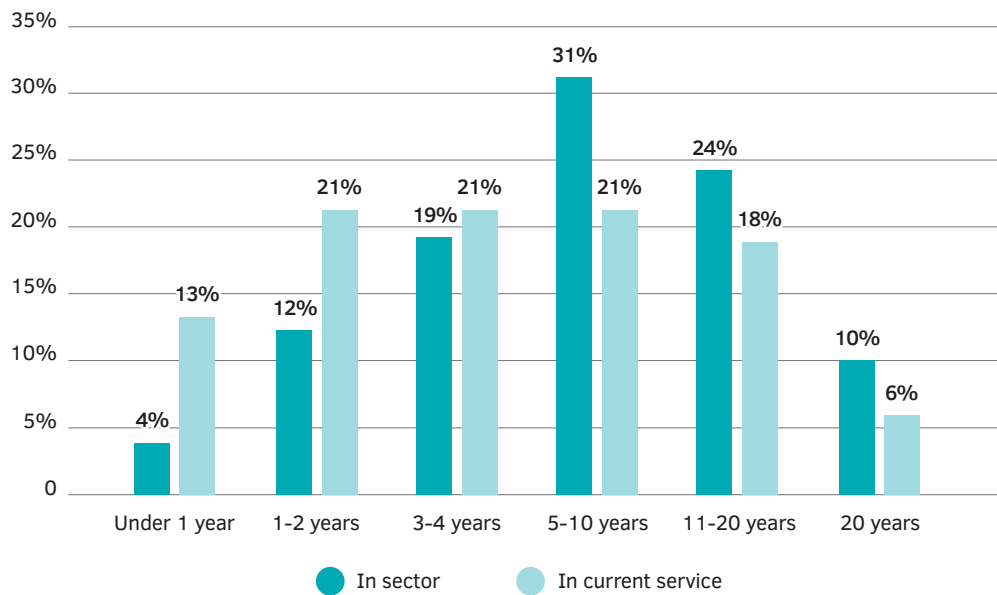
Table 6.7 presents the community/private and urban/rural breakdown of staff and the length of time that they have worked in the sector. Length of employment in the sector has not been visibly affected by the location or type of service staff are employed in. Staff working in the sector for longer than 20 years are more likely to work in private facilities (12%) than community services (8%).

Table 6.7 Breakdown of staff working directly with children by length of time in the sector, organisation type and urban/rural location[61]

	Community	Private	Urban	Rural	Total
Number of staff	6,359	10,490	11,384	5,465	16,849
Under 1 year	5%	4%	4%	4%	4%
1-2 years	12%	12%	13%	11%	12%
3-4 years	19%	20%	20%	18%	19%
5-10 years	30%	30%	29%	31%	31%
11-20 years	26%	22%	23%	26%	24%
20 years +	8%	12%	11%	10%	10%

61　The data was not available for 26 staff.

6.12   Job titles

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

6.12.1 Staff who work directly with children[62]

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

Almost a half of all staff (47%) work primarily with ECCE children, with 21% as room leaders and 26% as early years assistants. The corresponding figures for staff working with non-ECCE children are 12% as room leaders and 21% as early years assistants. Figure 6.12 presents the numbers and percentages of staff by job title. The proportions are broadly in line with the previous year, with the exception of early years assistants, whose share in the overall staff number decreased by 2%, from 23% in 2018/19.

Figure 6.12 Staff working directly with children by job title[63]
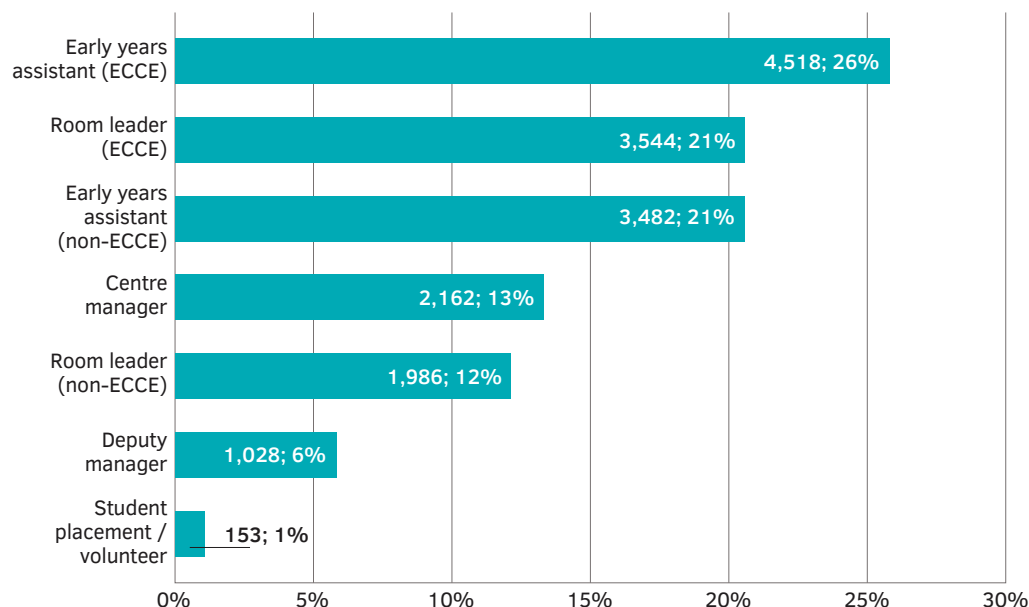
6.12.2 Ancillary staff[64]

Centre managers (not working directly with children) account for the single biggest cohort among ancillary staff (25%), followed by staff working in catering (24%). Those working mainly in administration and maintenance together account for a further 38%. Figure 6.13 presents the numbers and percentages of ancillary staff by their job titles.

62 Including managers working directly with children.
63 The data was not available for eight staff.
64 Including managers not working directly with children.

Figure 6.13 Ancillary staff by job title[65]
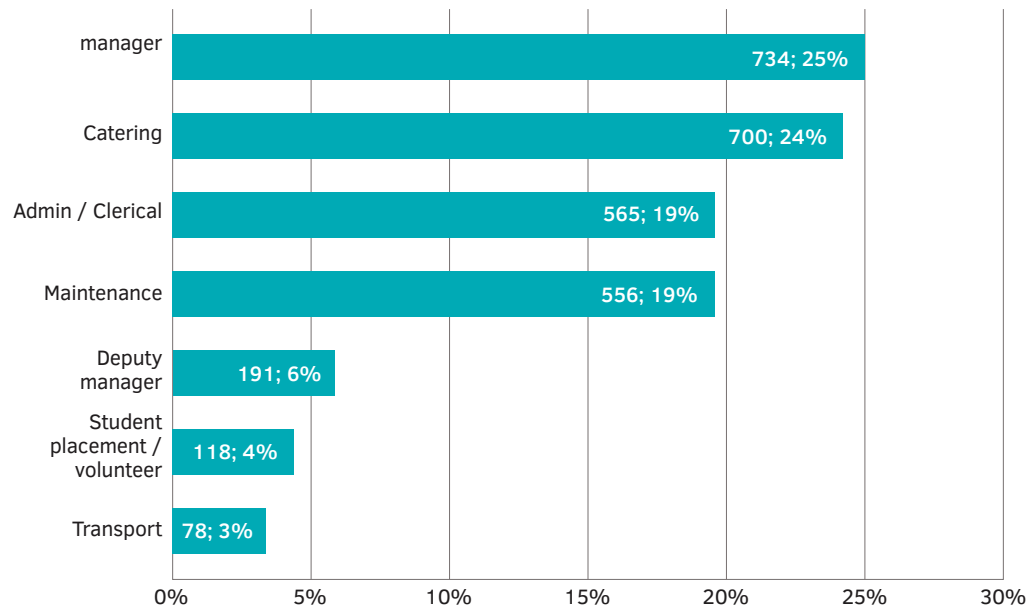
6.13   Staff qualifications

6.13.1   Staff highest qualifications

Respondents were asked to provide details of qualifications for staff working with children. In 2019/20, the total number of staff working directly with children with qualifications at NFQ Level 5 or higher was reported at 15,926. This represents 94% of all staff working directly with children, the same as reported in both 2018/2019 and 2017/18. The proportion of staff with a qualification at NFQ Level 6 or higher was 69% (11,592). This was up from 67% last year and 65% in the previous year. The overall proportion of staff with no formal qualifications relevant to the ELC and SAC sector fell to 5%, compared to 6% in 2018/19. The year-on-year changes in respect of staff qualifications are presented in Figure 6.14.

Figure 6.14 Staff working directly with children – percentage by highest level of qualification between 2015/16 and 2018/20
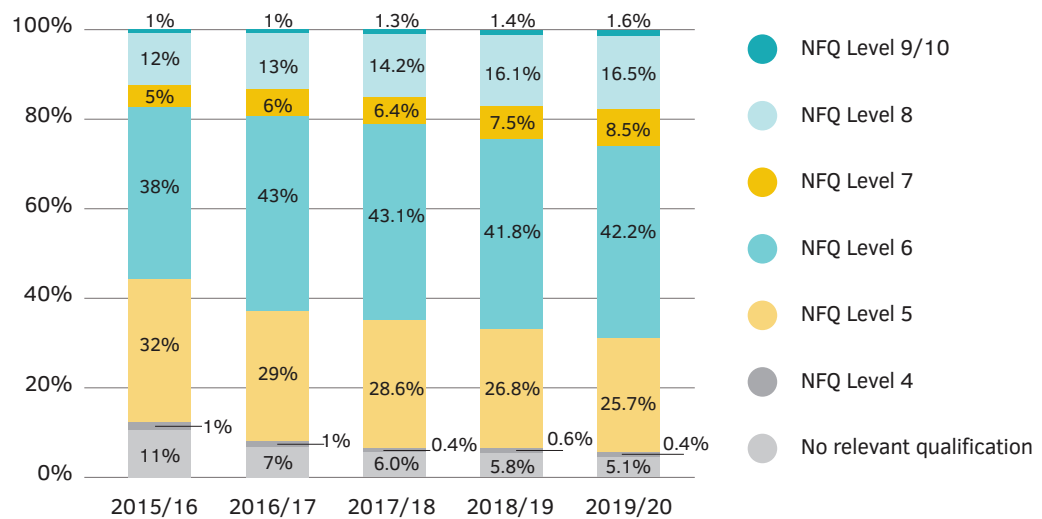
65 The data was not available for eight staff.

Under the "Child Care Act 1991 (Early Years Services) Regulations (2016)", all staff working directly with children of pre-school age and employed by services must hold a minimum of a NFQ Level 5 qualification, as of December 31st 2016. The legislation exempts those who signed the Grandfather Declaration (as discussed in section 6.13.5). 2019/20 marks the third year in a row where the proportion of staff with an NFQ Level 5 qualification or above remained unchanged (Figure 6.15). This includes staff who are on employment schemes or other government funded programmes. When the staff who are on those schemes / programmes are excluded, the proportion of staff (directly-employed) with an NFQ Level 5 qualification or higher is 94%.

Figure 6.15 Percentage of staff working directly with children who have an NFQ Level 5 qualification or above (from 2010 to 2019/20)
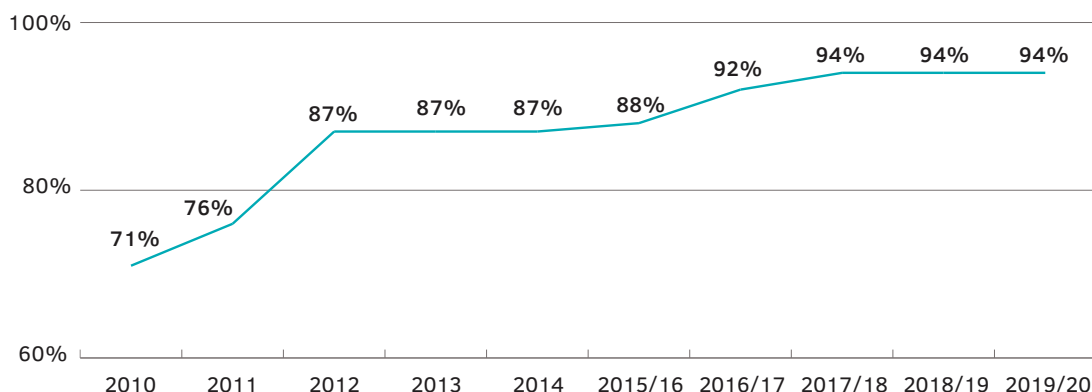
Table 6.8 provides further details regarding staff qualifications. On average, staff in private services have higher qualifications. Over two thirds of staff in private services (73%) have an NFQ Level 6 qualification or above, compared to 63% of staff in community services. This difference may be associated with community services' higher levels of staff who are on employment schemes or government funded programmes, whose qualifications are lower – 31% of all staff on employment schemes/other government funded programmes have an NFQ Level 6 or higher, in comparison to 71% of direct employees.

Table 6.8 Staff working directly with children – number and percentage by highest level of qualification[66]

Qualification level	Community		Private		All	
	Number of staff*	% of staff	Number of staff*	% of staff	Number of staff	% of staff
Total staff	6,359	38%	10,497	62%	16,856	100%
NFQ Level 5 or above	5,810	91.4%	10,116	96.4%	15,926	94.5%
NFQ Level 6 or above	3,976	62.5%	7,616	72.6%	11,592	68.8%
No relevant qualification	519	8.2%	346	3.3%	865	5.1%
NFQ Level 4 Award	30	0.5%	35	0.4%	65	0.4%
NFQ Level 5 Award	1,834	28.8%	2,500	23.8%	4,334	25.7%
NFQ Level 6 Award	2,658	41.8%	4,452	42.4%	7,110	42.2%
NFQ Level 7 Award (Ordinary Degree)	420	6.6%	1,021	9.7%	1,441	8.5%
NFQ Level 8 Award (Honours Degree)	822	12.9%	1,954	18.6%	2,776	16.5%
NFQ Level 9/10 Award (Masters/PhD)	76	1.2%	189	1.8%	265	1.6%

66 The data was not available for 19 staff.

6.13.2   Country in which staff member obtained qualification

Respondents were asked to provide details of the country where staff members obtained their early learning and care qualification. A total of 52 countries were represented. Of those that reported having an ELC qualification, the vast majority of staff acquired those qualifications in Ireland (92%), see Table 6.9.

Table 6.9 Staff working with children (excluding managers) – country in which ELC qualifications were obtained

Country	Number of staff	% of staff
Ireland	11,874	92.5%
Spain	380	3%
United Kingdom	215	1%
Poland	116	0.9%
Romania	28	0.2%
Brazil	23	0.2%
Lithuania	23	0.2%
Croatia	16	0.1%
United States	14	0.1%
Italy	11	0.1%
Latvia	11	0.1%
Hungary	10	0.1%
Other	109	0.9%
Total	12,830	98.61%

6.13.3   Qualifications in process

The survey asked respondents to provide details regarding staff who were in the process of acquiring qualifications. The responses provide a profile of the qualifications expected to come on stream within the sector. At the time of the survey, 2,311 people, representing 14% of staff working with children, were in the process of acquiring a qualification. Figure 6.16 compares the levels of qualifications sought between 2016/17 and 2019/20 by the staff in process of acquiring a qualification. The majority of staff studying for higher qualifications planned to obtain an award at NFQ Level 6 and the proportion of those who study for this level increased from 46% in 2018/19 to 49% this year.

Figure 6.16 Staff working directly with children – level of qualification in process of attaining
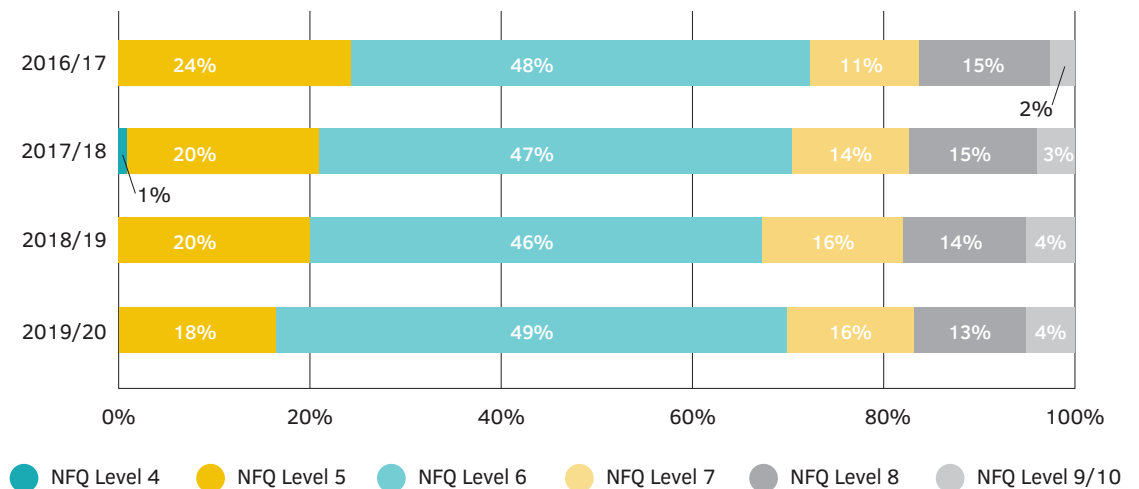
6.13.4 Staff with no qualifications

In order to establish the number of staff working directly with children who are neither qualified nor in the process of qualifying, further analysis and cross-referencing was required. Firstly, the number of persons who were not qualified to NFQ Level 5 was established (930). Then, staff who belonged to any of the following categories were removed: student and volunteer placements, those who had signed a Grandfather Declaration[67]; and those in the process of obtaining an NFQ Level 5 or above. As a result, a total of 296 staff working directly with children (1.8%) were identified as not yet qualified and not in the process of qualifying, as of June 2019 (compared to 1.5% the previous year). If the staff who are in the process of obtaining an NFQ Level 5 qualification are included, the number of staff with no qualification was 656 (3.9% of staff). Last year, staff with no qualification also represented 3.9% of staff working with children.

6.13.5 Signed Grandfather Declaration

As noted earlier, regulations introduced in 2016 require all staff members working directly with pre-school children to have a minimum relevant qualification of NFQ Level 5. The exception to this requirement are any staff members who have signed a 'Grandfather Declaration'. This declaration states their intention to retire or resign before 1st September 2021. Services reported 749 staff members who have signed the declaration. This represents 4.4% of staff which is down from 5% of staff last year. Of the staff that have been reported to have signed the 'Grandfather Declaration', 573 (77%) had a relevant qualification of NFQ Level 5 or above.

6.14 Age range of children catered for

The survey gathered data on the age range of children with whom each staff member primarily works. The majority of staff (61%) work primarily with children aged 3+ to 5 years. The smallest proportion of staff (4%) work primarily with babies. Figure 6.17 presents a breakdown of staff by age range of children worked with. This breakdown is very similar to that of 2018/19.

Figure 6.17 Staff working directly with children – by age range of children worked with[68]
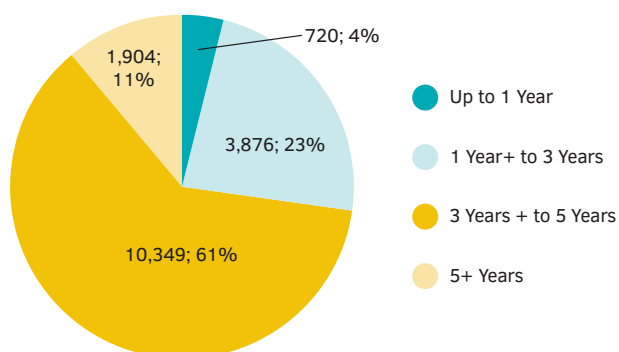
This question allowed for an analysis of the qualification levels of the staff assigned to each age cohort. Table 6.10 presents the qualifications of staff depending on the age group they primarily work with. It shows that:

› The most qualified personnel (NFQ Level 7 and above) are working with children aged 3+ to 5 years.

› 86% of staff working with babies have qualifications, at NFQ Levels 5 and 6.

› Staff working in school-age childcare tend to have the lowest qualification levels, with 23.4% not having any relevant formal qualification, although 58.4% have either an NFQ Level 5 or 6.

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67 For details regarding Grandfather Declarations, see section 6.13.5
68 Data was not available for 26 staff.

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

Table 6.10 Staff working directly with children by highest level of qualification attained and age range of children worked with

	Up to 1 year	1 year+ to 3 years	3 years+ to 5 years	5+ years	Total by age range
Total number of staff	720	3,874	10,345	1,901	16,840
NFQ Level 5 or above	96%	96%	97%	75%	**94%**
No relevant qualification	3.3%	3.9%	2.4%	23.4%	**5.1%**
NFQ Level 4	0.3%	0.5%	0.2%	1.3%	**0.4%**
NFQ Level 5	41.9%	37.2%	20.1%	26.9%	**25.7%**
NFQ Level 6	43.8%	42.3%	43.9%	31.5%	**42.1%**
NFQ Level 7	3.6%	4.6%	10.9%	5.6%	**8.6%**
NFQ Level 8	6.5%	10.8%	20.5%	9.8%	**16.5%**
NFQ Level 9/10	0.6%	0.7%	2.0%	1.5%	**1.6%**

6.15   Wages

6.15.1   Methodology

The survey collected information on the wages of staff who work with children and, for the first time, ancillary staff. As part of the data cleaning process, student placements/volunteers and those receiving nominal wages were excluded. Thus, staff paid an hourly wage[69] only, or in receipt of more than €1 per hour were included in the analysis. At the top end of the range, data for staff with the highest hourly wage of €70 was removed.

As many ELC/SAC providers are self-employed and may not pay themselves a standard or regular wage, the survey instructions included specific advice for them. For staff paid an hourly wage, services were asked to calculate their hourly rate based on the gross earnings for the previous month worked[70]. This data also includes relief staff that work with children, as it is likely that they may receive different wages in the different services that they provide the cover for.

Given the different nature of the wages for staff working with children and ancillary staff as well as the differing categorisations of wages for managerial staff, results are presented separately.

6.15.2   Wages of staff working with children[71]

The average hourly wage of staff working with children in the ELC and SAC sector is €12.45. This is the average wage based on the data for 13,058 staff who work with children[72], excluding managerial staff (working with children), staff on employment schemes/government funded programmes (wages for these staff were excluded as many of the schemes/ programmes define the earnings of their participants and services have no say in how much such staff earn). In 2019/20, one out of two staff earned below the 'living wage' rate of 2020 (€12.30 per hour). In Ireland, the living wage was reported to be €12.30 in 2020. The living wage refers to the level of earnings that makes possible for full time employed adults (without dependents) to have a minimum acceptable standard of living[73].

69 An hourly wage, annual salary or other income was recorded for managerial staff.

70 Prior to COVID-19 closure.

71 Excluding managers working with children.

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

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

In order to compare the average wage for staff working with children in 2019/20 and 2018/19, the same methodology applied last year was applied on this year's data (however, all managerial staff working with children were excluded from last year's data). The average hourly wage in 2018/19 using this methodology was €11.99. This means that the average hourly wage for staff working with children was 4% higher in 2019/20.

As staff wages are determined by a set of factors, such as staff job title, geographical location or experience, those most prominent are analysed in greater detail in the following sections.

6.15.3 Staff position/job title

Staff position within the service is one of the key determinants of wages. ECCE room leaders earned the highest average wages amongst staff working with children (excluding managers, whose wages are discussed in a separate section) at €13.69. The lowest average hourly wage was paid to early years assistants (non-ECCE) who earned €11.51 per hour. This section also includes wages information for relief staff, who were excluded from the analysis of other characteristics due to potential double reporting of the same person by multiple services. The average hourly rate for relief staff was €11.58. For the first time since information was collected on relief staff, their average wage was higher than the average wage paid to early years assistants (non-ECCE). For a detailed breakdown see Figure 6.18.

The average hourly wage for early years assistants (both ECCE and non-ECCE), who constitute 55% of all staff working with children is €11.91 per hour, 39c below the "living wage" for Ireland in 2020, and 4% higher than last year.

Figure 6.18 Staff working directly with children (excluding managers) – average hourly wage by job title
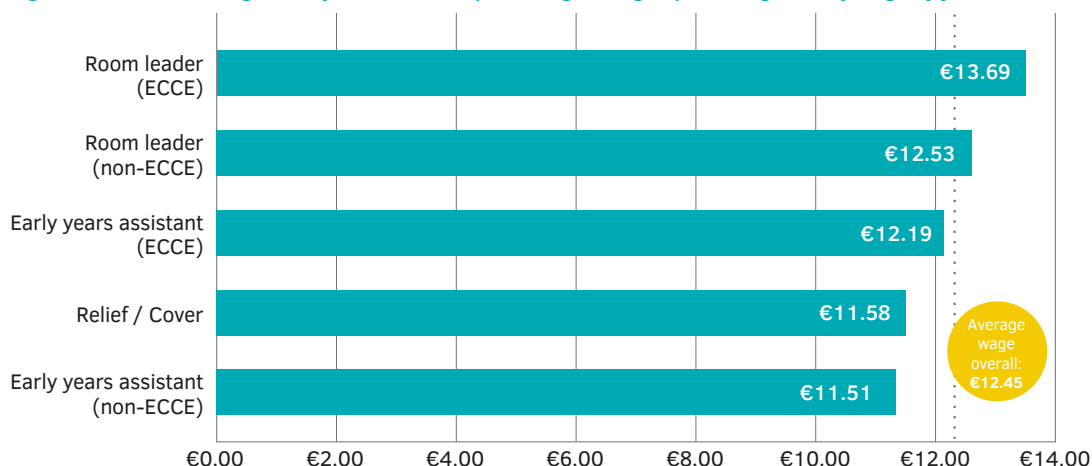
6.15.4 County

The average wages vary geographically. The average hourly wages range from €11.49 per hour in Monaghan to €13.48 per hour in Dublin City. The highest rates of pay were recorded in Dublin, Cork and Offaly, while the lowest were in Monaghan, Sligo and Donegal. Figure 6.19 presents the breakdown of average wages of staff working with children by county.

Figure 6.19 Average hourly wage of staff working with children (excluding managers) by county

County	Wage
Dublin - Dublin City	€13.48
Dublin - Dún Laoghaire-Rathdown	€13.37
Cork City	€12.94
Dublin - Fingal	€12.91
Dublin - South Dublin	€12.86
Offaly	€12.73
Kildare	€12.68
Cork County	€12.66
Galway	€12.49
Wicklow	€12.46
Mayo	€12.36
Waterford	€12.34
Meath	€12.28
Cavan	€12.16
Kerry	€12.14
Roscommon	€12.11
Longford	€12.10
Carlow	€12.03
Louth	€12.01
Limerick	€12.01
Tipperary	€11.97
Wexford	€11.96
Clare	€11.90
Leitrim	€11.89
Westmeath	€11.86
Kilkenny	€11.80
Laois	€11.80
Donegal	€11.66
Sligo	€11.50
Monaghan	€11.49

Average wage overall: **€12.45**

6.15.5 Length of time in service

The length of time staff worked in their current service has also been a determinant of wages (see Figure 6.20). The average hourly wage for those working over 20 years in a service is €15.46, while the rate for those with less than one year's tenure in a service is €11.82 – a difference of €3.64 or 31%. The gap between those with the longest tenure in a service and those with the shortest has narrowed since last year, by 2%.

Figure 6.20 Staff working directly with children (excluding managers) – average hourly wage by length of time in current service
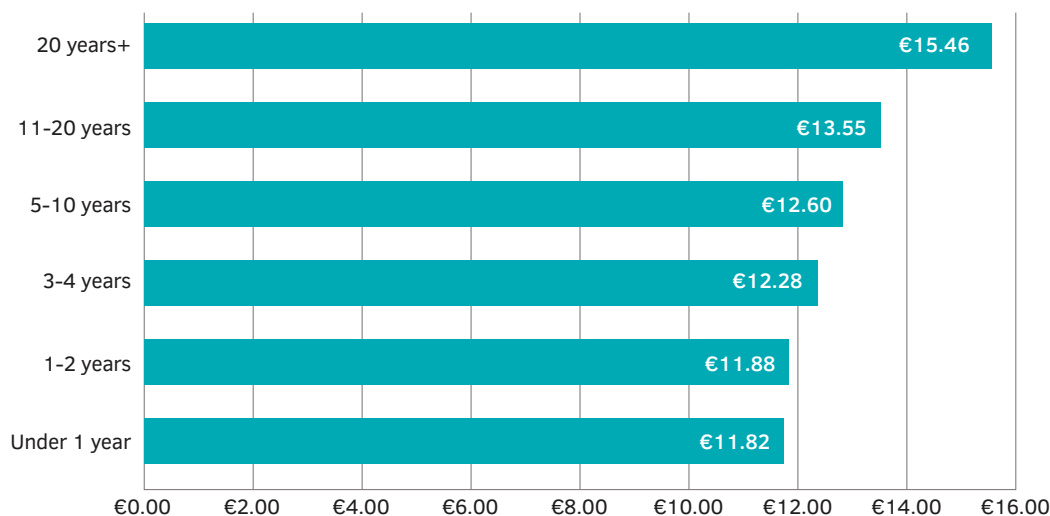
6.15.6   Highest qualification attained

Staff qualification levels also have an influence on wages. Figure 6.21 presents the average hourly wage for different levels of qualifications for staff working with children. Those with the highest qualifications (NFQ Level 9 or 10) also earn the highest wages (€14.06 per hour), while those with NFQ Level 5 qualifications earn the least – €11.69 per hour. However, the relationship between wages and qualifications is not linear. While newer staff are likely to have higher qualifications, they also have less experience and, therefore, are likely to earn less than those working longer in the service or sector.

For example, those with NFQ Level 7 earn, on average, more than those who have NFQ Level 8, and those with NFQ Level 4 fare better than those who have NFQ Level 5. These anomalies in respect of the overall relationship between qualifications and wages were also observed between qualifications and wages in the previous year. This indicates that while qualifications are a driver of wages, their importance is not as significant as staff position, county or length of experience.

Figure 6.21 Staff working directly with children (excluding managers) – average hourly wage by highest level of qualification attained

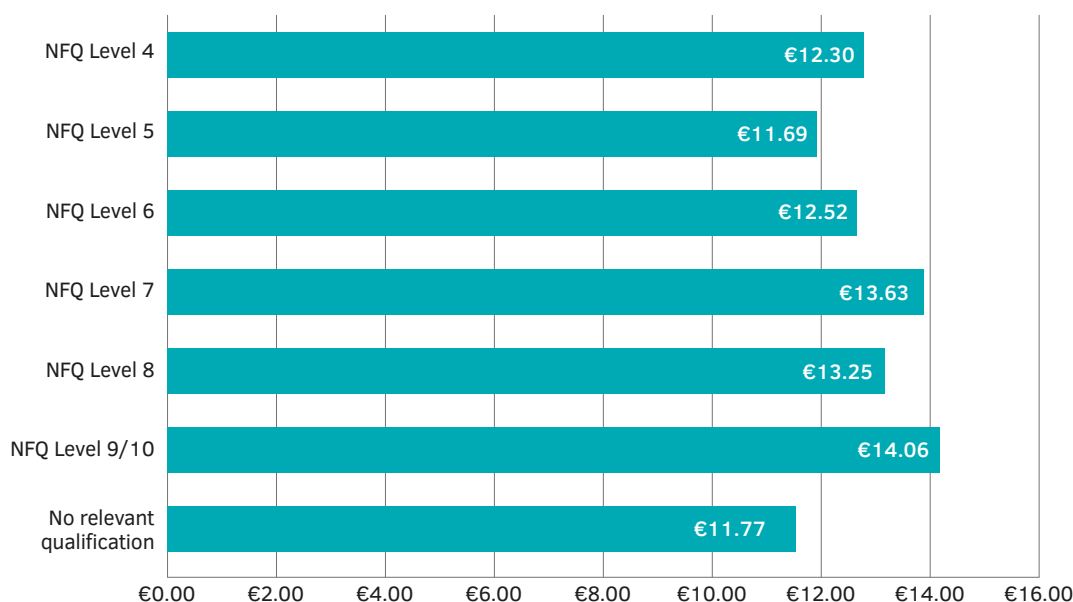Table 6.11 provides a detailed breakdown of staff wages by staff position and level of qualifications. Please note that some of the staff categories outlined below have very few staff and, therefore, averages may be impacted by factors that have much stronger influence on the wages than qualifications. An example of this is room leaders (ECCE) qualified to NFQ Level 4 – there were only two staff in this category and one had worked in the sector for more than five years.

Table 6.11 Staff working directly with children (excluding managers) – average hourly wage by job title and highest level of qualification attained[74]

Job title	NFQ Level 4	NFQ Level 5	NFQ Level 6	NFQ Level 7	NFQ Level 8	NFQ Level 9/10	No relevant qualification	Total
	(51)	(3,973)	(5,556)	(914)	(2,046)	(162)	(507)	(13,209)
Early years assistant (ECCE)	€13.38	€11.90	€12.29	€13.03	€12.56	€12.78	€12.56	**€12.19**
Early years assistant (non-ECCE)	€11.71	€11.30	€11.61	€12.11	€11.96	€12.00	€11.51	**€11.51**
Relief / cover	€11.97	€11.43	€11.59	€11.79	€12.44	€10.30	€11.44	**€11.58**
Room leader (ECCE)	€16.10	€13.16	€13.36	€14.46	€13.76	€14.56	€13.63	**€13.69**
Room leader (non-ECCE)	€12.42	€11.89	€12.71	€12.76	€13.17	€14.01	€12.16	**€12.53**
Total average wages	**€12.30**	**€11.69**	**€12.52**	**€13.63**	**€13.25**	**€14.06**	**€11.77**	**€12.45**

6.15.7 Wages and fees

A baseline analysis was carried out to examine the degree of correlation between full day fees (because these fees are most representative of fees levels) and the average wages for each service. As in previous years, a correlation between wages and fees could not be found.

6.15.8 Managerial staff wages

For the first time in 2019/20 survey, respondents were asked to state if managerial staff (including managers working with children) were on an hourly wage, annual salary or other (e.g. drawing non fixed income from the business). Table 6.12 provides a breakdown of income types for managerial staff by manager type. Overall, the highest percentage of managers were paid an hourly wage (43.7%). When broken down by manager type, managers employed by the service had the highest percentage of staff paid an hourly wage (70.6%), compared with 12.4% of owner-managers. Managers that are less likely to be paid other income are managers employed by the service (0.5%) compared to owner managers (66.2%).

Table 6.12 Breakdown of income types for managerial staff by manager type

	Annual salary	Hourly wage	Other income
	(1,084)	(1,801)	(1,233)
Manager employed by the service	28.9%	70.6%	0.5%
Owner-manager (owner operator)	21.4%	12.4%	66.2%
Managers (overall)	**26.4%**	**43.7%**	**29.9%**

Table 6.13 shows the average income for managerial staff by manager type and whether they worked in community/ private and urban/rural services. Overall, the average annual salary for all managers was higher in community services (€34,819) compared to those in private services (€30,203) and higher in urban services (€33,007) than in services located in rural locations (€28,223). The highest hourly wage was also in community services (€16.22) and lowest in private services (€14.61).

74 Data was not available for nine staff.

Table 6.13 Average income for managerial staff by income type, organisation type and urban/rural location

	Manager employed by the service			Owner-manager / owner operator			Managers (overall)		
	Annual salary	Hourly wage	Other income	Annual salary	Hourly wage	Other income	Annual salary	Hourly wage	Other income
Community	€34,851	€16.20	€11,300	€29,000	€23.19		€34,819	€16.22	€11,300
Private	€30,098	€14.35	€13,031	€30,282	€15.65	€20,001	€30,203	€14.61	€19,947
Urban	€33,764	€15.39	€15,195	€31,539	€16.37	€21,073	€33,007	€15.51	€21,030
Rural	€29,173	€14.91	€10,743	€26,973	€14.70	€18,418	€28,223	€14.89	€18,303
All	€32,817	€15.22	€12,598	€30,275	€15.76	€20,001	€31,898	€15.28	€19,924

6.15.9 Ancillary staff wages

Services were asked, for the first time this year, to report details of the average hourly wage for ancillary staff (excluding managers). The average wage was reported as **€12.34.** Figure 6.22 presents the average hourly wage by job title. In general, those in administrative / clerical positions earned the highest hourly wage (€13.77), followed by transport staff (€12.52). Both catering and maintenance staff on average earned below the "living wage" of €12.30 at €11.79 and €11.59 respectively.

Figure 6.22 Ancillary staff (excluding managers) average hourly wage by job title
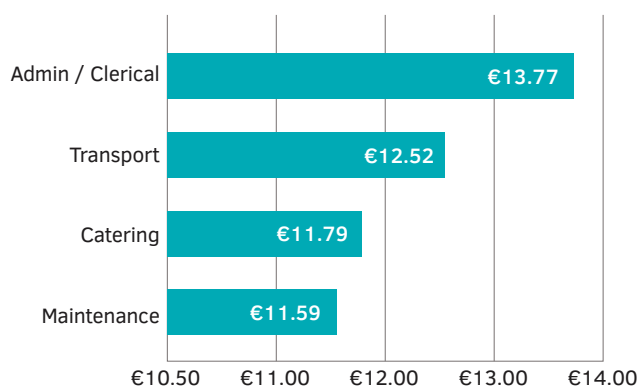
6.16 Staff turnover

The data presented in Section 6.11 (Length of time working in the ELC and SAC sector) suggests considerable levels of inter-service mobility or staff turnover. An analysis was undertaken to identify the rate of staff turnover, for staff working directly with children, in ELC/SAC services. The methodology used to establish the turnover rate for each facility involved factoring out any possible reduction or expansion in staff numbers. Four data types were used to calculate turnover:

> number of staff working in the service;

> number of staff who left in the past twelve months;

> number of staff working in the facility who had worked there for less than twelve months; and

> number of staff vacancies at the time of completing the survey.

Where a staff member had left and there was a corresponding new staff member or vacancy, this was counted towards the turnover rate. However, if the number of staff recruited was higher than the number who left, the number who left was counted, so as not to confuse turnover with expansion. The methodology only included new entrants who were working in the service at the time of the survey, rather than the total number who began that year. It is possible that the turnover rate may be underestimated due to a small number of staff who both left and re-joined a service within the past 12 months, and who are therefore not captured in the calculations.

The annual staff turnover rate was 18%. This is down five percentage points on last year's figure of 23%. Table 6.14 shows the average rates of staff turnover by county. Like in the previous year, the highest rate was in Dublin – Dún Laoghaire-Rathdown (38%) and the lowest in Roscommon (11%).

Table 6.14 Average staff turnover rates per county

County	Average turnover rate
Dublin – Dún Laoghaire-Rathdown	38%
Kildare	22%
Sligo	21%
Dublin – Dublin City	20%
Leitrim	20%
Longford	20%
Carlow	20%
Westmeath	19%
Mayo	18%
Dublin – Fingal	17%
Cork City	17%
Galway	17%
Monaghan	17%
Louth	17%
Tipperary	17%
Meath	17%
Limerick	17%
Wexford	16%
Donegal	16%
Kerry	16%
Cavan	16%
Clare	16%
Wicklow	16%
Laois	16%
Offaly	15%
Cork County	14%
Dublin – South Dublin	14%
Kilkenny	14%
Waterford	11%
Roscommon	11%
Average overall	**18%**

Respondents were asked for details in relation to staff retention and the destinations of the staff who left employment in an ELC/SAC service during the last year[75]. As Table 6.15 shows, the majority of services (64%) retained all their staff during the 12 months up to the completion of the survey. The proportion of services retaining all staff increased by 5% on the previous year. Additionally, the share of services which lost more than three staff decreased from 7% in 2018/19 to 5% this year. This indicates that overall, lower number of staff left their services in the twelve months up to completion of the survey than in previous years.

The highest retention rates are in the private services and in settings located in rural areas, where 66% and 67% of services retained all their staff respectively.

Table 6.15 Staff retention and loss by organisation type and urban/rural location

	Community	Private	Urban	Rural	All
Retained all staff	58%	66%	61%	67%	**64%**
Lost 1 staff member	23%	19%	21%	20%	**20%**
Lost 2 or 3	15%	10%	12%	10%	**11%**
Lost more than 3	4%	5%	6%	3%	**5%**

Services reported 2,107 staff leaving employment in their facility in the last 12 months prior to the completion of the survey. When asked about the destinations of staff who had left, respondents indicated that 22% had gone to another ELC/SAC service, 52% had left the sector, 13% had left Ireland and respondents were unsure of the destinations for the remaining 13%. The number of staff leaving the sector has risen 13% compared to the previous year.

Services were asked to indicate the level of qualification of staff that left. Of the staff who left[76], 93% had an NFQ Level 5 qualification or above, 4% had an NFQ Level 4 or no relevant formal qualification and services stated that they did not know the level of qualification for 3% of staff that left (see Table 6.16). Staff qualified to NFQ Level 6 was more likely to leave their employment in community services (39%) and those located in rural areas (38%) compared to urban and private services (34%).

Table 6.16 Level of qualification of staff working directly with children who left in the past 12 months by organisation type and urban/rural location

	Community	Private	Urban	Rural	Total
Total number of staff who left	639	1,468	1,501	606	**2,107**
% of staff who left in last 12 months by level of qualification:					
NFQ Level 4 or no relevant qualification	5%	4%	4%	4%	**4%**
NFQ Level 5	26%	26%	26%	27%	**26%**
NFQ Level 6	39%	34%	34%	38%	**36%**
NFQ Level 7 or above	27%	33%	33%	28%	**31%**
Don't know	3%	3%	3%	3%	**3%**

75 Services were requested to provide this detail for staff prior to COVID-19 closures of ELC/SAC services nationally. However, some services may have reported the loss of staff due to this closure of services.

76 Qualification details were missing for 27 staff members.

6.17   Staff vacancies

Services were asked to report the number of staff vacancies. Of those services that responded to the question, 16% (468) reported having at least one staff vacancy[77]. This is down from 23% in 2018/19. The total number of vacancies reported by survey respondents was 815.

Respondents were asked to categorise the number of vacancies in their service by specific staff qualifications, including AIM Level 7 Support (see Table 6.17). The majority of vacant positions were for staff with NFQ Level 5 qualifications at 40% (329 vacancies), followed by NFQ Level 6 qualifications at 33% (265 vacancies). There were 64 positions for AIM Level 7 support staff.

Table 6.17 Number and percentage of vacancies for staff working directly with children by level of qualification

	No. of vacancies	% of vacancies
NFQ Level 5	329	40%
NFQ Level 6	265	33%
NFQ Level 7 or above	157	19%
AIM Level 7 support	64	8%
Total	815	100%

Services were also asked if they had experienced challenges in recruiting suitably qualified staff over the past 12 months. 44% of services reported experiencing such challenges (see Figure 6.23). This is down 9% on 2018/19.

Figure 6.23 Services that experienced challenges in relation to recruiting suitably qualified staff in the last 12 months

1,269
(44%)

Yes

No

1,612
(56%)
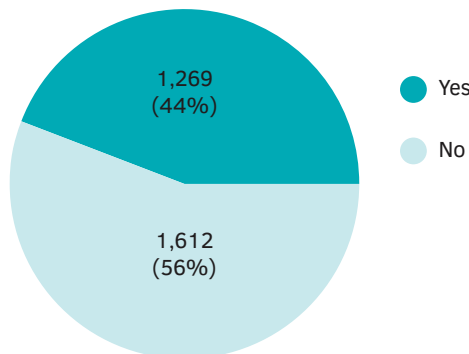
In addition, services were asked if they had actively recruited/advertised for staff living overseas in the past 12 months and 10% of services stated that they had, see Figure 6.24.

Figure 6.24 Services that actively recruited / advertised for staff living overseas in the past 12 months[78]

300
(10%)

Yes

No

2,579
(90%)
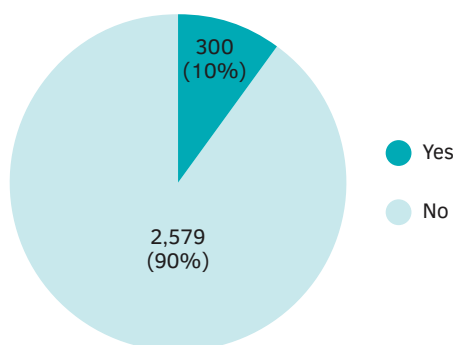
77 Data was not available for 83 services. And 18 services stated they had staff vacancies but did not state the qualification level for those staff members.

78 Data was not available for 85 services.

7
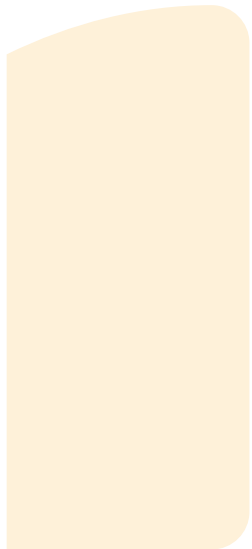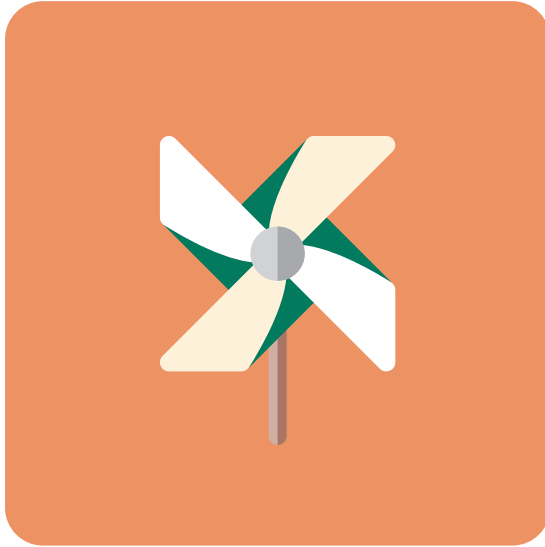
Concluding remarks

The context in which providers completed the Annual Early Years Service Profile survey for the 2019/20 programme year was unique and unlike anything previously experienced by the sector. This period for the ELC and SAC sector was characterised by the disruptive effect of the COVID-19 pandemic, with services required to close from 12th March to 29th June 2020. This influenced the collection of data, as well as potentially influencing a number of trends seen in this year's report. For e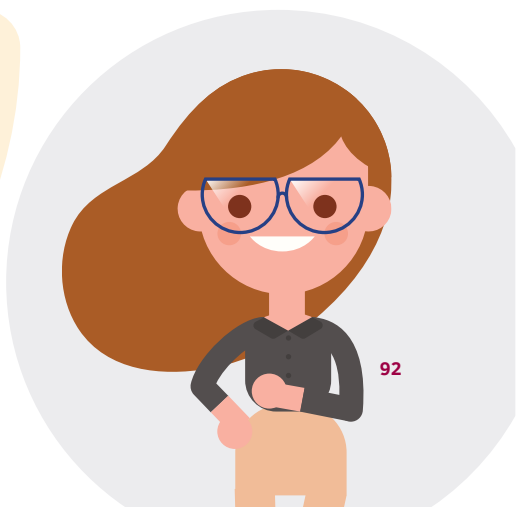xample, the decrease in the number of services paying rates (by 6%), as well as a reduction in the overall values of rates paid (by 5%) are likely to have been influenced by the reduction in the value of rates paid or suspension of rates in response to COVID-19 closures.

A significant development in 2019/20 was the introduction of the National Childcare Scheme (NCS) which opened for applications in November 2019. This new scheme represents the first statutory entitlement to financial support for ELC and SAC. Between the launch of the scheme and 24th August 2020 (the end of the first programme year), a total of 53,513 children from 42,557 households received subsidies under the NCS.

In 2019/20 fees have increased but the rate of increase has been less than in previous years, at less than 1% across all service types. Wages have increased year-on-year; however, the pace of growth is slow. The average hourly wage of childcare staff (excluding managers) in 2019/20 was €12.45. This represents an increase of 4% on the previous year. The level of staff qualifications has been increasing steadily over the last few years, with 27% of staff working directly with children now holding a qualification at NFQ Level 7 or higher.

This report covers a challenging period for the ELC and SAC sector but also demonstrates its resilience and continued development. The 2020/21 report will be based on data collected in June 2021 and will show the actual impact of the COVID-19 pandemic on the sector.

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Appendices

Appendix 1: Number of children supported and registration value across DCEDIY programmes from 2014/15 – 2019/20

This appendix presents the changes over the last five years for each programme in regard to the number of children supported and funding levels for the entire programme year. Please note that the detailed analysis in the individual programme sections in Chapter 2 are based on the period up to 12th March 2020, when the services closed due to COVID-19.

	Programme	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
Number of children	ECCE	66,761	74,108	120,821	118,899	108,204	105,975
	CCS/CCSP*	23,716	25,832	27,150	38,846	45,594	38,790
	CCSU**	N/A	N/A	N/A	39,319	33,743	24,409
	CCSR(T)***	N/A	N/A	N/A	560	610	372
	TEC	6,814	7,068	6,350	4,655	3,474	2,218
	NCS						24,983
	Total children	**N/A**	**N/A**	**149,426**	**185,580**	**185,971**	**180,149**
Approved registration value	ECCE	€138,959,130	€178,054,067	€273,753,848	€242,015,900	€267,582,672	€196,031,521
	CCS/CCSP*	€39,700,820	€39,675,222	€42,639,511	€92,459,723	€114,002,199	€80,465,166
	CCSU**	N/A	N/A	N/A	€18,439,956	€18,965,743	€10,666,801
	CCSR(T)***	N/A	N/A	N/A	€1,929,396	€2,468,439	€1,346,602
	TEC	€18,416,268	€18,676,285	€16,822,504	€11,817,425	€8,735,485	€4,659,968
	NCS						€16,302,332
	Total registration value	**N/A**	**N/A**	**€333,215,863**	**€366,662,400**	**€411,754,539**	**€309,633,240**

* CCS/CCSP figures for 2019/20 refer to CCSP only as CCS was not open for registrations in 2019/20.

** CCSU first opened for registrations in the 2017/18 period so there is no comparative data from previous years.

*** CCSR(T) first opened for registrations in the 2017/18 period so there is no comparative data from previous years. CCSR(T) figures are separated from CCSP figures for the entire Programme year 2017/18 and 2018/19.

Appendix 2 Part 1: Average fees by age range and type of care at county level (0–3 years)

County	Up to 1 year			1 year+ to 2 years			2 years+ to 3 years		
	Full day	Part time	Sessional	Full day	Part time	Sessional	Full day	Part time	Sessional
Carlow	€157.83	€88.25	€81.80	€155.70	€85.50	€70.29	€152.20	€88.29	€76.50
Cavan	€163.33	€96.88	€74.92	€165.36	€97.69	€73.95	€168.33	€97.94	€70.86
Clare	€170.92	€104.35	€76.96	€170.76	€104.95	€75.12	€170.73	€104.06	€74.17
Cork City	€200.38	€116.25		€206.23	€115.46	€96.50	€208.71	€108.25	€84.58
Cork County	€211.92	€133.73	€96.13	€206.56	€131.50	€93.71	€204.32	€120.96	€78.68
Donegal	€173.30	€110.38	€76.27	€169.63	€106.94	€72.69	€169.84	€105.83	€66.83
Dublin – Dublin City	€219.11	€134.39	€89.75	€219.00	€131.74	€88.19	€212.49	€127.87	€80.73
Dublin – Dún Laoghaire-Rathdown	€261.88	€179.93	€89.42	€255.63	€173.22	€84.37	€244.32	€143.60	€88.25
Dublin – Fingal	€245.16	€155.33	€96.33	€232.46	€139.02	€81.73	€221.97	€126.91	€78.64
Dublin – South Dublin	€234.49	€141.91	€110.71	€223.28	€145.10	€96.25	€216.87	€130.47	€80.47
Galway	€173.13	€102.06	€70.27	€171.08	€102.14	€70.56	€169.46	€101.58	€72.24
Kerry	€183.34	€104.93	€68.11	€183.05	€99.89	€70.44	€180.59	€99.89	€68.27
Kildare	€209.52	€133.67	€99.30	€202.52	€129.00	€87.41	€195.51	€126.30	€78.92
Kilkenny	€170.67	€103.00	€73.07	€175.67	€108.09	€73.62	€173.05	€106.00	€73.08
Laois	€179.70	€135.00	€84.44	€177.06	€116.50	€83.47	€173.05	€111.46	€73.77
Leitrim	€155.00	€91.25	€73.00	€154.17	€85.00	€67.70	€154.17	€87.86	€67.56
Limerick	€178.64	€112.30	€78.46	€174.35	€110.15	€77.54	€176.28	€104.59	€71.81
Longford	€167.50	€98.89	€67.75	€159.09	€93.00	€67.39	€159.09	€93.00	€68.68
Louth	€192.06	€122.43	€72.92	€180.42	€112.92	€76.10	€176.10	€109.82	€73.37
Mayo	€168.38	€117.83	€79.83	€165.15	€111.83	€75.81	€162.18	€113.85	€70.47
Meath	€190.19	€106.82	€69.71	€189.34	€109.31	€78.91	€185.35	€112.02	€76.15
Monaghan	€158.06	€92.06	€63.09	€154.59	€88.45	€64.69	€152.73	€87.74	€65.18
Offaly	€182.74	€118.25	€82.33	€175.96	€117.29	€79.50	€173.63	€115.67	€72.97
Roscommon	€170.02	€96.57	€75.58	€165.52	€99.00	€73.38	€162.10	€97.56	€69.75
Sligo	€185.00	€115.42	€87.00	€166.02	€106.58	€80.97	€164.66	€102.86	€77.84
Tipperary	€170.10	€108.78	€78.50	€162.49	€105.27	€74.77	€160.86	€103.30	€72.49
Waterford	€176.11	€105.28	€70.00	€175.31	€100.71	€68.44	€172.05	€101.81	€71.00
Westmeath	€186.67	€125.00	€78.13	€176.88	€112.77	€75.31	€176.69	€106.94	€72.54
Wexford	€181.46	€109.09	€85.56	€177.63	€108.00	€83.67	€175.33	€105.00	€77.37
Wicklow	€219.60	€129.21	€57.50	€204.13	€115.37	€65.00	€203.58	€119.36	€78.83
National Average	€187.87	€116.31	€79.55	€183.17	€112.08	€77.58	€180.54	€108.69	€74.40

Appendix 2 Part 2: Average fees by age range and type of care at county level (3+ – 6 years)

County	3 years+ to 4 years			4 years+ to 5 years			5 years+ to 6 years		
	Full day	Part time	Sessional	Full day	Part time	Sessional	Full day	Part time	Sessional
Carlow	€152.20	€80.00	€72.95	€152.20	€89.29	€73.72	€137.50	€82.50	€77.14
Cavan	€163.53	€97.94	€69.79	€165.63	€97.00	€71.30	€166.11	€89.38	€70.83
Clare	€173.37	€105.76	€71.30	€172.30	€105.45	€72.34	€172.50	€109.12	€74.40
Cork City	€199.84	€113.15	€76.20	€199.82	€114.47	€75.90	€256.25	€160.50	€103.33
Cork County	€200.70	€117.93	€77.60	€198.93	€114.69	€77.22	€203.20	€126.79	€82.71
Donegal	€169.63	€108.30	€66.61	€170.95	€105.50	€67.77	€171.00	€111.12	€71.19
Dublin – Dublin City	€212.55	€126.32	€77.86	€217.11	€126.72	€77.96	€212.49	€124.20	€83.53
Dublin – Dún Laoghaire-Rathdown	€236.84	€130.82	€84.82	€240.25	€132.98	€87.73	€227.63	€152.10	€89.33
Dublin – Fingal	€217.99	€128.27	€76.07	€215.41	€126.75	€76.14	€216.11	€125.18	€80.59
Dublin – South Dublin	€216.20	€128.33	€76.67	€214.57	€134.69	€78.38	€200.15	€125.48	€70.17
Galway	€167.41	€102.12	€70.83	€162.25	€102.15	€70.96	€148.29	€100.64	€68.29
Kerry	€178.16	€99.91	€68.20	€175.09	€97.84	€67.88	€175.33	€96.56	€65.03
Kildare	€189.80	€116.04	€77.90	€188.34	€116.25	€77.43	€192.50	€113.67	€81.32
Kilkenny	€168.45	€105.34	€73.26	€166.86	€105.12	€73.54	€164.38	€98.86	€75.10
Laois	€172.43	€111.12	€72.95	€173.47	€112.01	€75.48	€168.38	€109.48	€77.15
Leitrim	€151.25	€81.22	€65.74	€151.25	€81.22	€65.19	€149.17	€81.00	€65.69
Limerick	€169.98	€105.18	€73.23	€170.58	€98.64	€74.61	€178.45	€99.21	€73.28
Longford	€158.64	€91.36	€69.91	€157.50	€90.42	€68.50	€157.50	€82.50	€75.00
Louth	€174.54	€109.03	€72.68	€174.60	€108.75	€73.50	€178.33	€126.00	€78.18
Mayo	€161.58	€111.64	€68.87	€161.94	€110.95	€68.61	€167.40	€111.67	€63.88
Meath	€179.02	€107.35	€73.82	€177.46	€108.72	€73.63	€183.43	€106.96	€72.98
Monaghan	€146.49	€86.40	€65.93	€145.38	€84.60	€65.63	€157.97	€85.65	€70.31
Offaly	€169.19	€109.22	€70.83	€169.19	€109.30	€72.27	€180.00	€115.00	€79.06
Roscommon	€160.18	€92.36	€69.35	€159.18	€92.32	€70.57	€156.25	€93.98	€69.88
Sligo	€164.66	€101.29	€76.41	€161.97	€104.00	€75.65	€159.50	€101.39	€75.65
Tipperary	€159.07	€99.58	€71.38	€155.13	€99.34	€72.34	€154.50	€99.76	€72.71
Waterford	€164.68	€99.91	€69.85	€164.39	€102.90	€70.36	€164.90	€103.15	€69.09
Westmeath	€176.37	€106.21	€72.66	€175.99	€107.81	€73.72	€175.00	€98.75	€72.07
Wexford	€173.44	€103.48	€75.80	€173.93	€101.72	€75.36	€182.00	€123.21	€82.39
Wicklow	€203.51	€121.37	€78.04	€197.89	€115.63	€80.14	€180.00	€112.68	€82.63
National Average	**€177.72**	**€106.57**	**€72.92**	**€176.99**	**€106.57**	**€73.46**	**€177.87**	**€108.88**	**€75.76**

Appendix 3: Staff working directly with children by urban/rural breakdown and by highest level of qualification obtained

	Urban		Rural		All	
Total staff by urban/rural	11,391	68%	5,465	32%	**16,856**	**100%**
NFQ Level 5 or above	10,708	94%	5,218	95%	**15,926**	**94%**
NFQ Level 6 or above	7,726	68%	3,866	71%	**11,592**	**69%**
No relevant qualification	634	6%	231	4%	**865**	**5%**
NFQ Level 4 Award	49	0.4%	16	0.3%	**65**	**0.4%**
NFQ Level 5 Award	2,982	26%	1,352	25%	**4,334**	**26%**
NFQ Level 6 Award	4,702	41%	2,408	44%	**7,110**	**42%**
NFQ Level 7 Award (Ordinary Degree)	940	8%	501	9%	**1,441**	**9%**
NFQ Level 8 Award (Honours Degree)	1,900	17%	876	16%	**2,776**	**16%**
NFQ Level 9/10 Award (Masters/PhD)	184	2%	81	1%	**265**	**2%**