

Annual
**EARLY YEARS
SECTOR PROFILE** Report
2020 / 2021



An Roinn Leanaí, Comhionannais,
Míchumais, Lánpháirtíochta agus Óige
Department of Children, Equality,
Disability, Integration and Youth



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Minister's foreword

As Minister for Children, Equality, Disability, Integration and Youth, I am delighted to publish the 2020/21 Annual Early Years Sector Profile Report. Administered by Pobal on behalf of my Department, for the past 19 years, the Service Profile survey has collected key data on the Early Learning and Care (ELC) and School-Age Childcare (SAC) sector in Ireland. Despite the additional pressures experienced by the sector during 2020/21, the report findings continue to play a very significant role in shaping and informing policy development and reform in my Department.

The 2020/21 programme year marked another challenging year for the ELC and SAC sector, for both its providers and those working in the sector and children and parents availing of the essential services it provides. Following the first closure of services in March 2020, ELC and SAC providers reopened in June 2021 and remained open until 6 January, 2021 when the resumption of the Early Childhood Care and Education (ECCE) Programme was postponed in line with public health guidance at that time. As the spread and impact of COVID-19 continued, the ECCE programme was suspended until 8 March, 2021 and ELC and SAC services operated on a restricted basis until 29 March, 2021. The COVID-19 Operating Support Payment (COSP) was extended until 26 March, 2021 for eligible services, while the Employment Wage Subsidy Scheme (EWSS) continued.

These closures resulted in an extremely uncertain period for ELC and SAC providers and those who rely on their services. Throughout this time, the continued dedication, resilience and commitment of those working in the sector was clear in their efforts to ensure that services opened in a safe and supportive environment as they welcomed the return of children in their care. I would like to thank and commend the leadership shown by services and their staff throughout the COVID-19 pandemic and the challenges it presented as they worked hard to ensure that vital services continued to be delivered under extremely difficult circumstances.

The global pandemic aside, there have been some very positive developments and good news for the sector, a lot of which is visible through the data, analysis and findings of this report. Gathering this information on an annual basis is vital for evidence-based policy making and has supported my Department in an unprecedented period of policy development and reform. To this end, in the past 12 months, the following initiatives and supports have included:

- The continued rollout of the National Childcare Scheme (NCS), now firmly established, with a total of 60,628 children from 48,254 households receiving subsidies in 2020/21
- The announcement of a new 'Core Funding' stream for services. Worth over €221 million in a full year, this funding will improve quality by supporting better pay and conditions for the workforce, improve affordability for parents by ensuring that fees do not increase and support the sustainability and stability of services

- The launch of 'Nurturing Skills: The Workforce Plan for Early Learning (ELC) and Care and School-Age Childcare (SAC), 2022–2028' which sets out plans for a graduate-led workforce and strengthened career pathways
- The establishment of a Joint Labour Committee (JLC) for early years services to provide a mechanism to help address issues of pay and conditions in the sector
- The publication of the 'National Action Plan for Childminding (NAPC)' to improve access to high-quality and affordable ELC and SAC through childminding. The Action Plan sets out an incremental and supportive pathway to bring childminders into the scope of regulation and supports which will enable more childminders to access Government subsidies, making their services more affordable to parents.

Elsewhere, as many of you will be aware, my Department commissioned a 'Review of the ELC and SAC Operating Model', which was undertaken by Indecon International Economic Consultants. The findings from this Review recommended a dedicated State Agency for Early Learning and Care and School-Age Childcare and this recommendation has been accepted by Government. Together with my Department, I look forward to working with stakeholders across the ELC and SAC system to implement this recommendation to build an effective and efficient operating model to benefit the sector, all children and their families.

The Annual Early Years Sector Profile does not happen overnight and involves many months of research, planning and analysis, alongside the participation of those working in the sector. I would like to extend my thank you to all providers who took time out from their busy schedules to complete the Service Profile survey for the 2020/21 programme year. Improvements to the ELC and SAC sector can only be made with accessible, comprehensive and reliable data, which in turn, informs our ongoing policy work in the area. Your continued contribution is invaluable and appreciated.

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

Lastly, I would like to acknowledge the hard work of all those at Pobal who managed the Early Years Sector Profile 2020/21 and collated and analysed the data so thoroughly. As is evidenced in this report, its findings will make a significant and important contribution to our combined goal of enabling children across Ireland to learn and develop through the provision of affordable, accessible and high-quality ELC and SAC, which is inclusive to all.



Roderic O'Gorman TD

Minister for Children, Equality, Disability, Integration and Youth





Message from the CEO

I am very pleased to introduce the Annual Early Years Sector Profile Report for 2020/21. For the past 19 years, Pobal has carried out the Annual Early Years Service Profile survey which collects important information about the Early Learning and Care (ELC) and School-Age Childcare (SAC) sector in Ireland. In the face of the additional pressures on the sector during the year that was 2020/21, this report and its findings present comprehensive data and analysis and provide Government with the facts, figures and statistics it needs to continue to develop, shape and support evidence-based policy and planning for the sector.

I think we can all agree that 2020/21 marked another challenging year for the ELC and SAC sector. Following the first closure of services in March 2020, ELC and SAC providers reopened in June 2020 and remained fully open until early January, 2021, in line with public health guidance at that time. As the impact of COVID-19 continued, ELC and SAC services operated on a restricted basis, for the children of essential workers and vulnerable children only, until the end of March, 2021. As was the case in 2020, these additional closures further highlighted the important role both ELC and SAC settings and the professionals who work in the sector play in our society and are testament to their continued dedication, commitment and strength of spirit to support the needs of those who rely on them most.

Each year, the information and analysis included in this report are used to plan for the delivery of accessible and high-quality early learning and care and school-age childcare to all children in Ireland. Once again in 2020/21, this data has played a pivotal role in helping the Department of Children, Equality, Disability, Integration and Youth (DCEDIY) in their continued response to the global pandemic to ensure that adequate measures were in place to support the sector. We are very proud that, as an organisation, Pobal was well positioned to work in collaboration with, and on behalf of the DCEDIY, in the delivery of additional initiatives and projects targeted at addressing and supporting specific issues imposed by COVID-19 through the range of programmes we manage. Together, our combined responsiveness and willingness of our colleagues, both at Pobal and in the DCEDIY, to adapt to new ways of working ensured that essential services continued to be delivered by providers in what was a very restricted social environment.

It goes without saying that we would be unable to collate and record the important information, data and analysis included in this report without the participation of all service providers and I would like to extend my sincere thank you to all services for the information they provided and the time they took to prioritise and complete this voluntary survey in 2020/21 during a very challenging and uncertain year. It is clear that as a sector, ELC and

SAC settings acknowledge the importance of both contributing to and providing accessible and valuable data to ensure that all future policy developments meet the needs of all children and families availing of their services and professionals working in this area.

I am very grateful and would also like to recognise the various teams at Pobal who administered this year's survey and analysed the data over many months to create this insightful and very relevant report. In a similar vein, I would also like to thank our colleagues throughout the sector including the City and County Childcare Committees (CCCs) and Voluntary Childcare Organisations (VCOs) for their continued support, without whom, it would not have been possible to create and define the important work highlighted in this report so succinctly.

As we are in the middle of 2021/22 programme year, the Review of Early Learning and Care (ELC) and School-Age Childcare (SAC) Operating Model, commissioned by the DCEDIY and developed by Indecon International Economic Consultants has just been published. We are committed to working with the DCEDIY to implement its recommendations and building a stronger ELC and SAC sector.

Finally, I would like to extend my sincere thank you to our colleagues at the DCEDIY and Minister Roderic O'Gorman TD for their vision, continued collaboration and partnership with Pobal to shape important policy priorities and for their enthusiasm, dedication and commitment to providing vital childcare services and improving outcomes for our society. We are delighted to work together with them to further build and strengthen the provision of high-quality early learning and care and school-age childcare in Ireland which is inclusive to all and supports children and families who rely on our services.

We should all be very proud of the work we have done and what we have achieved this year.

Anna



Anna Shakespeare
Chief Executive Officer (CEO), Pobal

Glossary of terms

AIM	Access and Inclusion Model
ARV	Annual Rate on Valuation
ASCC	After-School Childcare Programme
CCC	City and/or County Childcare Committee
CCS	Community Childcare Subvention
CCSP	Community Childcare Subvention Plus
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
COSP	COVID-19 Operating Support Payment
CPD	Continuing Professional Development
CSO	Central Statistics Office
CSP	Community Service Programme
DLP	Designated Liaison Person
DCEDIY	Department of Children, Equality, Disability, Integration and Youth
DEIS	Delivering Equality of opportunity In Schools
DSP	Department of Social Protection
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
EYS	Early Years Specialists
FÁS	Foras Áiseanna Saothair
HP	Haase-Pratschke
HSE	Health Service Executive
JI	Job Initiative Scheme
JLC	Joint Labour Committee
LINC	Leadership for Inclusion in the Early Years Programme
NAPC	National Action Plan for Childminding
NCS	National Childcare Scheme
NFQ	National Framework of Qualifications
PIP	Programmes Implementation Platform
SAC	School-Age Childcare
SACC	School-Age Childcare Capital
TEC	Training and Employment Childcare
VCO	Voluntary Childcare Organisation
YESS	Youth Employment Support Scheme



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Executive summary

This report presents an overview of the Early Learning Care (ELC) and School-Age Childcare (SAC) sector in Ireland for the programme year 2020/21. It presents analysis of key characteristics and trends in the sector using data from two main sources: the Annual Early Years Service Profile survey completed by 2,520 or 57% of ELC and SAC services and programme administration data held on the Early Years Platform (EYP) and Programmes Implementation Platform (PIP).

The impact of COVID-19 on the ELC and SAC sector continued throughout the 2020/21 programme year. While there was no prolonged closure of services like in the spring and summer of 2020, services were open only to children of essential workers and those from vulnerable families in Quarter 1 of 2021. The impact of the pandemic is clearly visible in some of the trends identified through analysis presented in this report, for example changes in the numbers of children enrolled and vacant places.

The survey was conducted between 28 May and 18 June, 2021, with the deadline extended to 18 June, 2021 to allow services more time to complete it, acknowledging the additional demands on the sector such as contracting for the 2021/22 programmes.



Programme enrolment and ELC and SAC services

In 2020/21, **169,579 children participated in at least one of the Department of Children, Equality, Disability, Integration and Youth (DCEDIY) funding programmes**, down by 6% on the previous year and by 9% on 2018/19. This decrease is a combination of the impact of COVID-19 on demand and a lower number of Early Childhood Care and Education programme (ECCE) eligible children, a consequence of lower birth rates. 84% of children enrolled across ELC and SAC services received State subsidies.

A total of **€447,172,028 was paid in subsidies** in 2020/21 for these programmes.

The total number of ELC and SAC services contracted to deliver at least one of the four DCEDIY funding programmes was **4,527**, a decrease of 163 services (4%) since the previous year. The highest proportion of services was contracted to offer ECCE at 89% (4,022) followed by the NCS at 67% (3,051).

In total, **104,612 children benefited from the ECCE programme** in 2020/21. While the number of children on ECCE declined by 1%, the number of children eligible for the scheme reduced by 3% (due to the decreasing birth rate). The number of children participating in ECCE for the first year decreased by 3% on the previous year, while those participating for the second year increased by 1%. This indicates that in 2020/21 more children availed of the second year of ECCE, compared to the previous year. The total value of the ECCE programme registrations in 2020/21 was **€297,291,187**.

During the period from 25 August, 2020 to 24 August, 2021, a total of **60,628 children from 48,254 households received subsidies under the National Childcare Scheme (NCS)**. The majority of these children availed of income assessed subsidies (43,317). €113,638,910 was paid out under NCS.

There was a significant decline in the number of services contracted to offer Community Childcare Subvention Plus (CCSP) as well as the number of children supported under this programme. Compared to 2019/20, the number of contracted services declined by 38% to 1,984 and the number of children decreased by 53% to 18,061. This is the expected effect of the closure of this programme to new entrants and the transition of children on CCSP to the NCS.

The number of services contracted to offer at least one strand of the Training and Employment Childcare (TEC) programme decreased by 43% to 952 services since last year. The majority of these services offered the Childcare Education and Training Support Programme (CETS) (93%). Only **431 children availed of the TEC programme over the entire programme year**, a reduction of 81% since 2019/20. This significant decline in the uptake of the TEC programme is likely a result of a combination of factors including the transition of children from legacy schemes to the NCS and a large number of parents having reached their maximum allowance under TEC and therefore, losing their eligibility for the programme. The total value of TEC contracts was €1,220,429, a reduction of 74% since last year.

Under the ELC and SAC Capital Programme 2021, €8.3million funding was made available to support compliance with fire-safety regulations and standards. A further €5.5 million was made available to ELC and SAC settings to enhance their outdoor spaces.

Remaining unchanged from the previous year, the majority of ELC and SAC services are operated by private, for-profit organisations (74%), with the remaining 26% operated on a not-for-profit basis (community). The proportion of services located in rural areas and urban areas also remained the same at 35% and 65% respectively.

Half of all services who responded to the survey had a capacity of 40 places or below in their service¹. Just under one in ten services (9%) had a capacity to cater for more than 100 children. Community services are larger with an average capacity of 58 compared to 47 in private services. On average, services operated 2.5 care rooms with 14 children or below using such rooms over the course of a typical day.

Just over one quarter of the services (26%) who responded to the survey were charged commercial rates in 2020/21. This is a 1% increase on 2019/20 when the lowest proportion (25%) was recorded since 2014/15. The lower percentage of services billed for rates over the past two years may be linked to the temporary suspension of rates due to COVID-19 by local authorities. Nationally, the average rate that services were billed for in 2020/21 was €4,093 which represents a reduction of 10% from €4,546 in 2019/20.

Inclusion and disability

The proportion of services with Traveller and Roma children attending has decreased in 2020/21 compared to the previous year. 17% of all services had at least one Traveller child attending, 1% less than last year, while the same figure for Roma children was 7%, a reduction of 2% on last year. In total, services reported 1,866 Traveller children and 507 Roma children attending their facility which represents 1.8% and 0.5% respectively of all children enrolled reported by the services. In 2018/19, these proportions were 1.5% and 0.4% respectively.

In 2020/21, 4,244 children were supported under the Access and Inclusion Model (AIM) by 2,045 services. Relative to the previous year, there was a 16% decrease in the number of services receiving support under AIM and a reduction of 26% in the number of children receiving support. These decreases were largely a result of the COVID-19 pandemic with parents of many children with additional needs supporting their children at home rather than availing of centre-based care. The lower number of children being supported under AIM Level 7, a decrease of 38% on the previous year, was also linked to the fact that a number of services opted to apply for the Employment Wage Subsidy Scheme (EWSS) as an alternative to AIM Level 7 funding.

Three quarters of services reported 7,284 children with disabilities and/or additional needs attending their services in 2020/21. These children represented 7% of all children enrolled, the same proportion as in 2018/19, with 65% availing of ECCE. The majority of children attending had a diagnosed learning or intellectual disability. Four in five services (81%) reported their building as being wheelchair accessible, while 88% reported having wheelchair access to their grounds.

Spaces, capacity and waiting lists

The estimated number of children enrolled in ELC and SAC services decreased by 12% (24,736 children) on 2018/19 when the data was last available and stood at **181,565** at the time of the survey. The distribution of children across different age groups has changed compared to 2018/19. While, the reductions were recorded for all age groups, these have not been distributed equally across different age groups. The largest decreases were observed for children aged 6 years+ (31%) and children up to 3 years (19%). These

¹ Capacity is defined in this report as the number of children enrolled in a service plus the number of real vacancies at a given point in time.

decreases are likely related to the impact of the COVID-19 pandemic on the uptake of ELC, and in particular, SAC places in 2020/21, as well as demographic changes.

Of the 2,520 services who responded to the survey, 1,435 services (57%) indicated that they had at least one vacant place within their service which is almost double the number in 2018/19 when 24% reported the same.

The decrease in the number of children enrolled was accompanied by a significant increase in the number of vacant places. The number of **vacant places more than doubled (213% or 26,491 places) this year to an estimated 38,935 places**. By comparison, the number of children enrolled decreased by 24,736 in the same period. While some decreases in the number of children enrolled may be attributed to demographic changes, this indicates that not all children have returned to centre-based care after the disruptions caused by the COVID-19 pandemic at the time of the survey.

The **vacancy rate in 2020/21 was 21%**, a significant increase on the 2018/19 vacancy rate of 6%. The vacancy rate for all age groups has risen significantly compared to two years ago and is most notable in older age groups. In 2020/21, nine counties had a vacancy rate of 25% or higher, indicating that the availability of places has increased across the country. However, given the significant drop in the numbers of children enrolled at the point in time when the survey was completed, it is likely these vacancy rates will reduce once the effects of the COVID-19 pandemic on the enrolments and vacancy rates lessen.

The **overall estimated capacity was 220,500**, representing an increase of 1% since data was last collected in 2018/19. The majority of places (58% or 127,656) were for children aged 3 years+ to 5 years. Compared to 2018/19, the proportion of places for children in older age groups (4 years+ to 6 years) has increased by 6%, while the proportion of places for all other age groups has decreased. Of the services surveyed, 22% reported they planned to increase their capacity, a decrease of 3% on the last time this data was collected in 2018/19.

Fees

In 2020/21, **the average weekly fee nationally per child for full day was €186.84**, for **part-time** was **€110.92** and for **sessional** was **€74.20**. The fees for all types of provision remained almost the same with less than a 0.5% increases for all types of care compared to 2019/20.

As in previous years, the most expensive fees were charged for babies up to 1 year (€192.06 for full day care and €117.97 for part-time care), while fees for children aged between 5+ to 6 years was the lowest at €178.64 for full day care and €107.91 for part-time care.

The location and type of service continued to have a substantial impact on fees charged. Average weekly fees charged by private providers in 2020/21 were 10% higher for full day care, 24% higher for part-time care and 16% higher for sessional care compared to community providers. Average fees were higher in services located in urban areas – 10% higher for full day care, 9% higher for part-time provision and 6% higher for sessional care. In addition, services located in more affluent areas charged higher fees. The full day fees in affluent areas were 27% higher than those in the locations classified as disadvantaged, indicating that local socio-economic situations also influence the setting of fees.

Staff

It is estimated that approximately **31,600 staff worked in the ELC and SAC sector in 2020/21**, of whom 26,197 (83%) worked directly with children. This was an increase of 2% on 2019/20. This increase did not reflect the level of reduction in the number of children enrolled (12%) indicating that the staffing levels remained stable despite notable reduction in the number of children enrolled. This could be related to the public health guidance for ELC and SAC services which recommended that children and adults stay in small, consistent groups termed 'in the operation play pods'.

Almost half of staff working with children and managers worked over 30 hours per week (46%). Staff working in private services work longer hours with 43% working 36 hours or more compared to 25% staff in community services.

Nearly all staff working in private services were directly employed (99%), compared to 85% of those working in community services. The remainder of staff working in community services are employed through various employment schemes/other Government funded programmes which accounts for one in seven staff.

In 2020/21, the gender breakdown in the sector remained the same. Staff who worked directly with children were almost exclusively female (98%) which represents the same proportion of females reported every year since 2015/16.

The majority of staff (53%) worked in the service for less than five years, while 69% of staff worked five years or more in the ELC and SAC sector. This suggests significant levels of inter-service mobility within the sector. Among all staff, just 5% entered the sector within the past year, 1% more than in 2019/20. However, 13% of staff were with their current service for less than one year indicating that most new staff in services have moved from another setting.

Staff qualifications

The vast majority of staff working directly with children (95% or 97% when excluding those who work solely in school-age childcare) have qualifications at NFQ Level 5 or higher and 70% have qualifications at NFQ Level 6 or higher (72% when excluding those who work solely in school-age childcare). This represents an increase of 1% for both qualification levels compared to 2019/20.

The proportion of staff with a qualification at NFQ Level 7 increased significantly from 9% in 2019/20 to 14% this year. This increase is underlined by growth in qualification levels of managerial staff working with children, 45% of whom had a qualification at NFQ Level 7 compared to 7% of all other staff working with children.

At the time of the survey, 1,981 staff, representing 13% of staff working with children, were in the process of acquiring a qualification, of whom 81% were studying at NFQ Level 6 or higher.

Staff wages and turnover

The average hourly wage of staff working directly with children in the ELC and SAC sector in 2020/21 was **€12.60** (excluding staff on employment schemes/Government funded programmes). This average excluded managerial staff working directly with children to make it comparative with the previous year when it was €12.45. The average hourly wage for staff working directly with children was 1% higher in 2020/21.

The average hourly wage of staff working directly with children, when including managers working with children, was €13.20.

Factors such as staff position, experience or geographical location influence the level of wages received. Centre managers are, on average, paid the highest hourly rate at €16.35 per hour, while relief staff and early years assistants (non-ECCE) earn the least (€11.69 and €11.77, respectively). The average hourly wage for early years assistants, (both ECCE and non-ECCE), who constitute 46% of all staff working with children, is €12.10 per hour, 2% higher than in 2019/20.

Wages differ notably at county level, with average hourly rates ranging from €12.16 per hour in Donegal to €14.35 per hour in Cork City.

The annual **staff turnover rate in 2020/21 was 19%**, 1% higher than the previous year. The staff turnover rates varied across counties from 9% in Cavan to 43% in Leitrim. Services also indicated that of 2,265 staff leaving their employment, 44% had left the sector.

Almost three in ten services (29%) reported having a staff vacancy, an increase of 13% on 2019/20. The total number of staff vacancies reported by survey respondents was 1,338. Almost half of all services (49%) reported challenges in recruiting suitably qualified staff over the past 12 months, an increase of 5% on 2019/20.

Child protection

The proportion of services who had at least one staff who have completed 'Children First' training over the past three years is 95%. This is an increase of 23% since 2018/19 when this data was last collected. Just under half of services (49%) required further supports and training in relation to 'Child Protection'. The highest demand was for training in 'Children First', with 80% of services indicating the need for training and supports in this area.

1

Background and context



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 2020/21 programme year. Pobal has been carrying out the Annual Early Years Service Profile survey (previously called the Annual Beneficiary Questionnaire and Annual Sector Survey) for the past 19 years, providing data and analysis needed to support evidence-informed policy and planning for the sector. Data from the 2020/21 survey has been integrated with information held about services on the Programmes Implementation Platform (PIP) and the Early Years Platform (EYP). In 2020/21, for the first time, services could complete the survey in Irish and 22 services did so.

The report is structured around the key issues relevant to the ELC and SAC sector such as fees, places and capacity, staff wages, staff qualifications and staff turnover.

Chapter 1	summarises any relevant policy, funding or other developments in the ELC and SAC sector in the 2020/21 programme year and outlines the methodology used for data collection and analysis.
Chapter 2	provides an overview of ELC and SAC programmes delivered in the 2020/21 programme year – Early Childhood Care and Education programme (ECCE), National Childcare Scheme (NCS), Community Childcare Subvention Plus (CCSP) and Training and Employment Childcare (TEC) – including data 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 data on supports provided under the Access and Inclusion Model (AIM) and funding under the COVID-19 Capital Grant and Reopening Support Payment (RSP).
Chapter 3	analyses key characteristics of the ELC and SAC services delivering the Department of Children, Equality, Disability, Integration and Youth (DCEDIY) funding programmes including their type, geographical location, types of ELC and SAC provided, commercial rates and opening hours amongst others.
Chapter 4	offers an analysis of children in ELC and SAC settings on issues of equality, diversity, inclusion and disability.
Chapter 5	provides an analysis of ELC and SAC places in terms of the number of enrolments, vacancies, children on waiting lists and the overall capacity within the sector.
Chapter 6	presents a breakdown of ELC and SAC fees by the type of provision, geographical location, organisation type, deprivation score and staff qualifications. It also includes information on SAC fees, both in term and out of term.
Chapter 7	summarises information about 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.
Chapter 8	discusses issues related to child protection such as staff training and policy.

1.2 ELC and SAC developments

1.2.1 New policy developments

First 5, A Whole-of-Government Strategy for Babies, Young Children and their Families (2019–2028), published in November 2018, sets out an ambitious programme of work across Government Departments to improve the experiences and outcomes of children in Ireland from birth to age five across all aspects of their lives in the coming ten years. The *First 5 Implementation Plan*, published in May 2019, describes the steps that will be taken in the initial implementation phase from 2019 to 2021. A First 5 Implementation Office has been established to monitor and report on implementation.

First 5 is fully endorsed in the Programme for Government and the commitments in *First 5* are reflected in key national policies including the *National Recovery and Resilience Plan (2021)*, *Making Remote Work: National Remote Work Strategy (2021)*, *Pathways to Work 2021–2025* and the *Roadmap for Social Inclusion 2020–2025*.

One of the major objectives is that babies and young children have access to safe, high-quality, developmentally appropriate ELC and SAC which reflects diversity of need. To meet this objective, the following strategic actions have been identified:

- Make high-quality ELC and SAC for babies and young children more affordable (through, for example, continued funding and support for two full years of ECCE and the introduction of and enhancements to the NCS).
- Maintain and extend the supply of high-quality publicly subsidised ELC and SAC to best serve the developmental needs of babies and young children, ensuring that it also reflects the needs and preferences of parents and families (through, for example, extending regulation to all paid, non-relative childminders on a phased basis and developing a strategic capital investment plan to deliver large-scale capital investment under Project 2040 with the aim of ensuring that the demand for high-quality ELC and SAC places meets supply).
- Ensure that ELC and SAC provision promotes participation, strengthens social inclusion and embraces diversity through the integration of additional supports and services for children and families with additional needs (through, for example, the continued rollout of AIM to ensure the full inclusion of children with a disability in settings delivering ECCE and possible extensions of AIM to meet the needs of other children).

Allied to this objective, *First 5* identifies a number of key building blocks, specifically:

- 1 Committed leadership, strong governance and positive collaboration and engagement aligned around a shared vision for babies, young children and their families.
- 2 A robust regulation, inspection and quality assurance regime to enforce and raise standards.
- 3 An appropriately skilled and sustainable professional workforce that is supported and valued and reflects the diversity of babies, young children and their families.
- 4 A strong national infrastructure for research and data that is used to inform policy and practice alongside an ongoing programme of monitoring and evaluation.
- 5 Additional public funding that is strategically invested to achieve the best outcomes for babies, young children and their families.

To meet this objective and put in place these necessary building blocks, *First 5* signposts major reforms and commits to, at least, doubling investment in ELC and SAC by 2028.

Some key ELC and SAC related *First 5* deliverables in 2021 include:

The National Action Plan for Childminding (NAPC), published in April 2021. The NAPC sets out a strategic phased pathway to the reform of home-based ELC and SAC. The overall objective of the NAPC is to improve access to high-quality and affordable ELC and SAC through childminding. To do this, the action plan sets out an incremental and supportive pathway to bring childminders into the scope of regulation and supports. This will enable more childminders to access Government subsidies, making their services more affordable to parents. It will also enable them to access a variety of supports to assist them in meeting regulatory and quality requirements. Phase 1 of the NAPC which is a two to three year preparatory phase has commenced and will include:

- The development of childminder specific regulations.
- The development of bespoke training and supports for the childminding sector.
- Further public and sector consultation.

Nurturing Skills: The Workforce Plan for Early Learning and Care (ELC) and School-Age Childcare (SAC), 2022–2028 was published in December 2021. *Nurturing Skills* sets out actions to achieve workforce commitments in *First 5* including:

- Achieving a graduate-led workforce in ELC by 2028, with new financial supports to assist early years educators to study while continuing to work in the sector.
- Supporting SAC practitioners to meet new qualification requirements which will be introduced incrementally over the coming years.
- Development of a career framework and strengthening career pathways including new supports for leadership development.
- Building a national infrastructure for Continuing Professional Development (CPD) for the sector.
- Supporting staff recruitment, retention and diversity in the workforce.

A key enabler for *Nurturing Skills* will be the Joint Labour Committee (JLC) for Early Years services and the new Core Funding stream (both described below) which, among other objectives, will support service providers to meet new higher rates of pay that may be negotiated through the JLC.

Partnership for the Public Good: A New Funding Model for ELC and SAC, published in December 2021, sets out 25 recommendations (all adopted by Government) and a new approach to State funding of the sector, specifically:

- A new additional funding stream for the sector, Core Funding, to support quality of provision, improved pay and conditions for staff, management of parental fees and sustainability of services.
- Universal and targeted Tackling Disadvantage funding and support, building on Core Funding. The universal strand will be informed by the universal elements of the Access and Inclusion Model (AIM) and the targeted strand informed by the Delivering Equality of opportunity In Schools (DEIS) model in schools.
- Continued provision of ECCE and the NCS with enhancements.
- An expanded role for the State in managing and supporting supply, quality, accessibility and affordability.

1.2.2 Impact of COVID-19

The COVID-19 global health emergency created a series of challenges for the ELC and SAC sector in 2020 which continued into 2021. After the first closure of services in March 2020, ELC and SAC providers reopened on 29 June, 2020 and remained fully opened until 6 January, 2021 when the Minister for Children, Equality, Disability, Integration and Youth, Roderic O’Gorman TD, announced the postponement of the resumption of the ECCE programme in January 2021. Up until 8 March, 2021, ECCE was suspended and ELC and SAC services operated on a restricted basis only (i.e. for the children of essential workers and vulnerable children only) until 29 March, 2021.

The limited opening of the sector in early 2021, in the absence of other funding approaches, had the potential to have a significant impact on the economic sustainability of the sector. Consequently, new funding arrangements were put in place to support the sector as outlined below:

- Services open during this period continued to receive 70% of the value of ECCE funding and 100% of funding provided under other DCEDIY funding programmes (i.e. the NCS, CCSP and AIM). These services could also receive the additional 30% of ECCE funding if they committed to certain conditions such as waiving fees for parents not using the service and retaining staff where possible.
- Services closed during this period, where the closure was approved by the DCEDIY, received 70% of the value of ECCE funding and 100% of funding provided under other DCEDIY funding programmes (i.e. NCS, CCSP and AIM). This funding was conditional on their commitment to waive fees for parents and retain staff where possible.
- A newly designed COVID-19 Operating Support Payment (COSP) was put in place to support some providers with a significant reliance on parental fee income to waive fees during this period while ensuring financial sustainability of a service.
- Central to the funding arrangements was the enhanced Employment Wage Subsidy Scheme (EWSS) which ELC and SAC providers could continue to access without having to demonstrate a reduction in turnover as was the case for other employers. The enhanced EWSS, in place for all of 2021, was estimated to cover 80% of payroll costs or 50% of full operating costs of these services at a cost of €34m per month to the State.

The phased reopening of ELC and SAC services took place throughout March 2021. ECCE reopened to all participating children from 8 March, 2021 and all other children could return to ELC and SAC services from 29 March, 2021. The normal funding arrangements returned from 8 March, 2021. The COSP was extended until 26 March, 2021 for eligible services, while the EWSS continued.

1.2.3 ELC and SAC Capital Programme 2021

Under the ELC and SAC Capital Programme 2021, €8.3million funding was made available to support compliance of fire safety regulations and standards. Capital grants of between €1,000 and €10,000 were available to contribute to the costs of remedial works required to receive a Fire Safety Certificate. This certificate is an essential part of the statutory regulation process undertaken by Tusla, the independent regulator of the sector. The deadline for the receipt of applications was 2 March, 2021. 717 applications were received, of which 638 were approved. The total amount paid as at 10 March, 2022 was €4,439,723.

The *Playing Outside Grant* for ELC and SAC services, announced on 1 June, 2021, provided €5.5 million in funding for services to enhance their outdoor playing area in line with public health guidelines. The grant opened for applications on 18 June, 2021 and closed on 10 September, 2021. 3,689 applications were approved under this grant. The total amount paid to services as at 10 March, 2022 was €4,592,805.

1.2.4 Other key developments

1.2.4.1 Joint Labour Committee

In December 2020, Minister O’Gorman began a short process to examine the possibility of regulating the pay and conditions of employment the ELC and SAC workforce and to examine the suitability of establishing a Joint Labour Committee (JLC). Arising from that process, the Minister wrote to the Minister of State for Business, Employment and Retail, Damien English TD, on 11 March, 2021 recommending the establishment of a JLC for the sector.

In line with the provisions of the *Industrial Relations Act*, the Labour Court recommended the establishment of a JLC and Minister English accepted the Labour Court’s recommendations. The Establishment Order came into effect at the beginning of July 2021. The JLC will provide an opportunity for unions and employer representatives to work together to determine wages and working conditions for ELC and SAC. The first meeting of the JLC took place on 14 December, 2021.

1.2.4.2 Budget 2022

A transformative package of measures was announced under Budget 2022. €716 million (an increase of €78 million from €638 million in 2021) was allocated for ELC and SAC for 2022.

This €716 million investment includes a new €69 million Core Funding stream for providers from September 2022 to ensure sustainability of services and support the introduction of an Employment Regulation Order to determine minimum rates of pay for workers as well as conditions of employment. It will also deliver quality measures to support children in services. In return for this funding, there will be a commitment from providers not to increase parental fees, meaning the full affordability effects of the NCS and ECCE will be felt by parents.

In a full year, €207 million will be available for providers under this new Core Funding stream. This will be equivalent to an increase of 16% in the total annual income to the sector (excluding additional COVID-19 specific funding).

In addition to the new funding stream for ELC and SAC, two changes to the NCS were announced which will result in more parents getting higher number of subsidised hours of ELC and SAC. These changes are as follows:

- The extension of age eligibility for the NCS universal subsidy to all children under 15, benefiting 40,000 children. The universal subsidy is worth up to €1,170 off a parents’ annual ELC and SAC costs. This change will be introduced in September 2022.
- Discontinuing the practice of deducting hours spent in pre-school or school from the entitlement to NCS subsidised hours. This means that parents will be able to use their full awarded subsidised NCS hours regardless of whether their children are in pre-school or school. This will particularly benefit children from low income families whose parents are not in work or study (approximately 5,000 children).

Budget 2022 also announced the continuation of the EWSS until April 2022. Following the end of this scheme, between May and August 2022, ELC and SAC providers will have access to a new once-off Transition Fund to ensure that there continues to be no increases in parents’ fees for ELC and SAC in the period leading up to the introduction of the new Core Funding stream in September 2022.

This package marks the beginning of an important and transformative multi-annual investment programme and significant progress on the commitment to increase spending on ELC and SAC to approximately €1 billion by 2028.

1.3 Methodology

1.3.1 Data sources

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

- **Early Years Platform (EYP) – for ECCE and NCS**
(Chapter 2 and Sections 3.1, 3.2 and 3.3)
- **Programmes Implementation Platform (PIP) – for CCSP and TEC**
(Chapter 2 and Sections 3.1, 3.2 and 3.3)
- **Service Profile survey**
(Chapters 4 to 8 and Sections 3.4 to 3.11)

The ELC and SAC services noted within this report refer 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 Early Years Platform (EYP)

The EYP was originally developed for the administration of the NCS. The system, which includes a parent portal and a service provider portal called 'Hive', was introduced in November 2019. Since then, a number of other programmes were moved to the EYP such as ECCE, AIM (Levels 1, 4, 6 and 7) and Capital Programmes. The figures related to NCS, ECCE and AIM were extracted from the EYP in November 2021.

1.3.1.2 Programmes Implementation Platform (PIP)

PIP is a live system used to administer DCEDIY funding programmes which have not yet moved to the EYP – CCSP, TEC and AIM Level 5. The figures in Chapter 2 and 3 focusing on CCSP, TEC and AIM (Level 5) were extracted from PIP in November 2021.

1.3.1.3 Service Profile survey

A total of 4,391² services with an active contract for the 2020/21 programme year were invited to complete the Service Profile survey. A link to the survey was posted on the Early Years Hive on 28 May, 2021. Services were asked to complete the survey by 11 June, 2021. This deadline was extended to 18 June, 2021 to give more time to services to complete the survey acknowledging the additional demands on the sector, such as contracting for the 2021/22 programme year. **A total of 2,520 services completed the Service Profile survey, with a response rate of 57%.** Of those services, 32% were community based and 68% were private services, 37% were based in rural areas and 63% were based in urban areas.

1.3.2 Extrapolation methodology

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

To extrapolate the number of children enrolled, vacant places, children on waiting lists and staff nationally, the following procedure was applied. For each county, the number of services

² 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.

contracted to provide at least one of the DCEDIY funding 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 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 on which to make estimates than by using the response rate itself.

1.3.3 Statistical analysis

The analysis of quantitative data included univariate and multivariate analysis. At various stages of the first order analysis, two types of averages were used, the mean and the median. Where the term '*average*' is used implies the arithmetic mean, while 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 were used to enhance multivariate 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 characteristics.

1.3.4 Urban/rural classification

The addresses of survey respondents held on the EYP were linked with the categorisation of the Central Statistics Office (CSO) which classifies each electoral division 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 and SAC service based on the electoral division within which their address is situated.

1.3.5 Definition of county

The term county can be used to describe county divisions or local authority areas. In this report, while '*county*' is used to describe local authority areas, it 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 which 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 where the Galway CCC represents both the city and county and, therefore, Galway is represented as a CCC area rather than a local authority categorisation in the report.

1.3.6 Presentation of data and analysis

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

2 Overview of the DCEDIY funding programmes



KEY STATISTICS

169,579

children

benefited from at least one of the DCEDIY funding programmes (ECCE, NCS, CCSP or TEC)



€447,172,028

was paid in subsidies (under ECCE, NCS, CCSP and TEC)

60,628

children

from

48,254

households

received subsidies under the NCS

4,244

children

were supported under the Access and Inclusion Model (AIM) by

2,045

services

84%

of all children

enrolled availed of at least one DCEDIY funding programme



53%

the decrease in the number of children availing of CCSP



2.1 Introduction

The Department of Children, Equality, Disability, Integration and Youth (DCEDIY) has a number of programmes in place to improve the affordability, accessibility and quality for Early Learning and Care (ELC) and School-Age Childcare (SAC)³.

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

- Early Childhood Care and Education (ECCE)
- National Childcare Scheme (NCS)
- Community Childcare Subvention Plus Saver (CCSP)
- Training and Employment Childcare Saver (TEC)
- Access and Inclusion Model (AIM)
- Capital
- Learner Fund

Pobal also manages the *Better Start* initiative which offers three operational components: the Quality Development Team, Access and Inclusion Model (AIM) and Early Years Learning and Development Unit.

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

This chapter presents information and key trends for the following programmes: ECCE, NCS, Saver Programmes (CCSP and TEC) and provides a brief overview of the Capital Programmes and AIM.

3 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>.

2.2 ECCE

ECCE is a universal programme available to all children within the eligible age range to provide them with their first experience of formal early learning prior to commencing primary school. In 2020/21, eligible children were those aged between two years, eight months and five years, six months⁴. The programme is provided for three hours per day, five days per week, over 38 weeks per year from September to June. Children can avail of ECCE for up to two years.

Services taking part in ECCE must provide an appropriate pre-school programme which adheres to the national practice frameworks – ‘*Síolta*’ and ‘*Aistear*’. The State pays a capitation fee to participating ELC services. In return, they provide a pre-school programme 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 ECCE can be viewed on [Pobal Maps](#)⁵.

In 2020/21, 4,022 services were contracted to deliver ECCE, a 9% decrease on the previous year. In comparison, the total number of services offering at least one DCEDIY funding programme decreased by 4%. The number of children benefiting from ECCE (104,612) also decreased by 1% compared to 2019/20⁶. By comparison, the number of eligible children, based on the number of births⁷ in relevant periods, decreased by 3%. The number of children participating in ECCE for the first year decreased by 3% on the previous year, while those participating for the second year increased by 1%. This indicates that in 2020/21 more children availed of the second year of ECCE.

The total value of the approved contracts in 2020/21 was €297,291,187, a 30% increase on the previous year. This increase was the effect of the closure of services between March and June 2020 due to COVID-19. 61% of services participating in ECCE had a higher capitation rate of €80.25 for at least one room, an increase of 4% on the 2019/2020 programme year. Table 2.1 presents key statistics for ECCE in 2020/21.

Table 2.1: ECCE - Key statistics for 2020/21 programme call

Number of services contracted	4,022
Total number of children benefiting	104,612
Number of children benefiting for the first year	58,874
Number of children benefiting for the second year	45,738
Number of approved registrations	109,823
Total value of approved contracts	€297,291,187
Number of services with higher capitation ⁸ rates	2,462

4 Eligible children were born between 1 January, 2016 and 31 December, 2017.

5 <https://maps.pobal.ie/>

6 This figure represents numbers from the start of the programme year up to 12 March, 2020, when services were closed due to COVID-19.

7 Children eligible for the 2019/2020 programme year were born between 1 January, 2015 and 31 December, 2016 (129,806 births recorded for that period in Ireland), while those eligible for 2020/2021 programme year were born between 1 January, 2016 and 31 December, 2017 (125,950 births recorded for that period in Ireland).

8 The higher capitation payment provides increased funding for ELC services with a graduate workforce. The standard rate is €69 and the higher rate is €80.25. Higher capitation is awarded to a service which has an ECCE session that meets the following requirements: (a) A room leader with a qualification recognised as meeting the minimum requirements for ECCE Higher Capitation, (b) The same room leader has a minimum of three years' paid experience working in the childcare sector, (c) The regulatory adult to child ratio is met, (d) A room assistant (if required for adult to child ratios) who holds a full and relevant qualification that meets the minimum regulatory standards. The adult to child ratio for ECCE session is 1:11 (all children in the room must be aged between 2.5 and 6 years).

2.3 NCS

The NCS is a national scheme of financial support for parents towards the cost of quality ELC and SAC. It opened for online applications on 20 November, 2019, replacing previous schemes with a single, streamlined scheme. The NCS aims to:

- improve outcomes for children and support lifelong learning
- reduce poverty
- facilitate labour market activation
- tangibly reduce the cost of ELC and SAC in Ireland for tens of thousands of families.

This report presents data on the NCS from 25 August, 2020 to 24 August, 2021. During this period, a total of 60,628⁹ children from 48,254 households received subsidies. Of these, 43,317 children received income assessed subsidies¹⁰, 17,303 children received universal subsidies¹¹ and 1,769 children were supported under sponsorship arrangements¹².

The total value of claims successfully submitted by providers during the same period was €113,638,910. The average weekly value per claim for income assessed subsidies was €70.40, for universal subsidies – €18.09 and for sponsor subsidies – €103.05.

Table 2.2: NCS – Key statistics for 2020/21 (from 25 August, 2020 to 24 August, 2021)¹³

Number of services contracted	3,051
Number of services who submitted a successful claim	2,663
Total number of children benefiting	60,628
Total number of households benefiting	48,254
Number of children benefiting from income assessed subsidies	43,317
Number of children benefiting from universal subsidies	17,303
Number of children benefiting from sponsorship arrangements	1,769
Total value of claims successfully submitted by providers	€113,638,910
Average weekly value per claim from income assessed subsidies	€70.40
Average weekly value per claim from universal subsidies	€18.09
Average weekly value per claim from sponsorship arrangements	€103.05

18,372 children with an approved 2019/20 CCSP and/or TEC registration also had an NCS 2020/21 claim (between 25 August, 2020 and 24 August, 2021) which illustrates the transfer of children from the legacy programmes, CCSP and TEC, to the NCS between the 2019/20 and 2020/21 programme years.

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- 9 Children may receive different types of subsidies. In the total figure, these children are counted only once, however, if a child has more than one type of subsidy they are counted in each type of subsidy.
- 10 **Income assessed subsidies** are for families with children aged between 24 weeks and 15 years. These subsidies are means tested and the award is calculated based on families' individual circumstances including family income, the child's age and educational stage and the number of children in the family.
- 11 **Universal subsidies** are for families with children under the age of three or with children over three years who have not yet qualified for the 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.
- 12 **Sponsored subsidies** are supported by a statutory body and 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.
- 13 Year on year comparisons for NCS were not included as the first year of NCS started in November 2019 and does not represent full programme year.

2.4 CCSP

The CCSP is primarily aimed at supporting parents from disadvantaged backgrounds with the cost of ELC and SAC. The DCEDIY funds a portion of these costs for eligible children, (a subvention payment), while parents pay the remainder. Since the introduction of the NCS in November 2019, which replaces the CCSP and TEC with a single, streamlined scheme, registrations for these programmes have been closed to new applicants¹⁴.

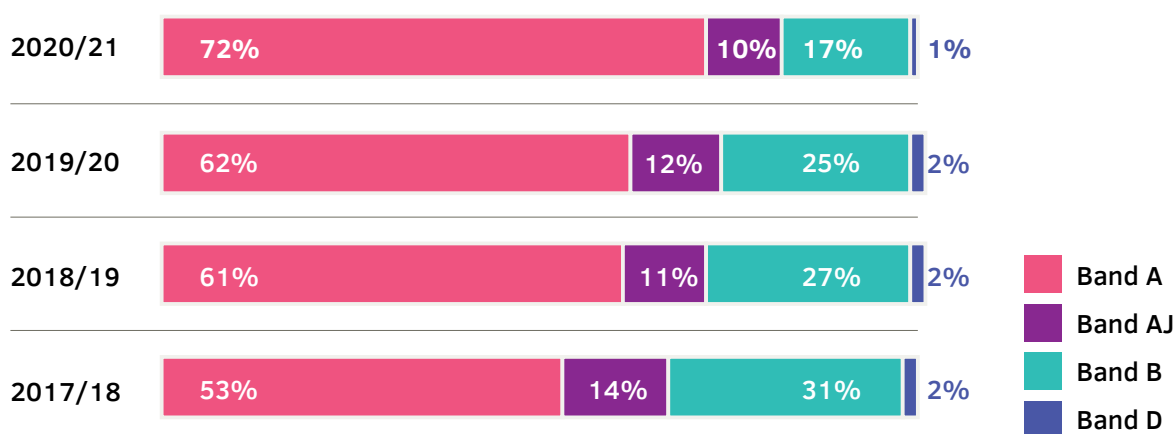
The level of CCSP payments is based on four eligibility bands¹⁵. Table 2.3 shows the eligibility bands and weekly subvention rates for CCSP.

Table 2.3: Eligibility bands and weekly subvention rates under CCSP in 2020/21

Session type ¹⁶	Band A	Band AJ	Band B	Band D
CCSP Full day	€145.00	€80.00	€70.00	€50.00
CCSP Part-time	€80.00	€80.00	€35.00	€25.00
CCSP Sessional	€45.00	€45.00	€25.00	€17.00
CCSP Half session	€22.50	€22.50	€12.50	€8.50

Figure 2.1 presents the breakdown of CCSP registrations by band since 2017/18. There has been a gradual increase in the proportion of registrations with 'Band A', alongside a simultaneous decrease in 'Band AJ' and 'Band B' over the last four years. However, this trend accelerated during the 2020/21 programme year with the proportion of children availing of 'Band A' increasing by 10% on the previous year.

Figure 2.1: Percentage of CCSP registrations by band



14 Eligible children who have been registered on CCSP prior to the introduction of the NCS can continue to avail of the programme until they no longer require care/reach an age that no longer qualifies them for support.

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

16 Service/placement types are: full day 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).

In 2020/21, 1,984 services were contracted to offer the CCSP which represents a 38% decrease on the previous year. Of the 1,984 services contracted to offer CCSP, 38% were community services. This proportion was 5% higher compared to 2019/20. This indicates that community services are more likely to continue to offer the CCSP to families already enrolled.

In 2020/21, 18,061 children benefited from CCSP, a decrease of 53% on the previous year when 38,790 children were supported under CCSP. The reduction in the number of contracted services and participating children is to be expected with the CCSP Programme being replaced by the NCS.

Table 2.4: CCSP – Key statistics for 2020/21 programme call

Number of services contracted	1,984
Total number of children benefiting	18,061
Total number of families benefiting	14,148
Number of approved registrations	26,353
Total value of approved contracts	€57,101,337

2.5 TEC

TEC is an overarching programme specifically designed to support parents/guardians participating in eligible training and education courses, as well as certain categories of parents/guardians returning to work, by providing subsidised ELC and SAC. Since the introduction of the NCS in November 2019, which aims to replace CCSP and TEC, registrations for these programmes have been closed to new applicants since 14 February, 2020.

TEC comprises three strands which are administered by Pobal on behalf of the DCEDIY as follows:

- **Childcare Education and Training Support programme (CETS)** subsidises ELC and SAC for participants on training 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)** subsidises SAC for certain categories of working parents and parents on Department of Social Protection (DSP) employment programmes (excluding Community Employment)¹⁷.
- **Community Employment Childcare programme (CEC)** subsidises ELC and SAC for parents who are participating in the Community Employment scheme. There are two strands within CEC, CEC(PS) (Pre-School) and CEC(AS) (After-School).

¹⁷ Parents of one or more children between the ages of 4 to 13 are eligible under the following conditions: (a) if one or both parents has/have 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, (b) if one or both parents is/are on an Employment Support Programme, (c) if one or both parents is/are on the Working Family Payment for any length of time and increase/s their working hours.

In 2020/21, 952 services were contracted to offer at least one strand of TEC, a decrease of 43% on the previous year. The number of services offering each strand has also decreased, with the highest decline of 46% observed for ASCC. The breakdown of the number of services contracted to offer TEC by strand is presented in Table 2.6.

In 2020/21, 304 parents/guardians benefited from and 431 children participated in TEC. This represents an 81% decline in the number of children in comparison to the 2019/20 programme year when 2,218 children participated in TEC. A smaller number of children participating than the number of services contracted indicates that only a proportion of services, which contracted for TEC, had a child availing of TEC subsidies in 2020/21. While the number of children benefiting from TEC has been decreasing every year since 2014/15, the rate of the decrease seen in 2020/21 has been the largest observed to date. There are a number of reasons for this, most likely linked to the introduction of the NCS and the transition of children from legacy schemes to the NCS.

The total value of approved TEC contracts in 2020/21 was €1,220,429. This represents a decline of 74% relative to the previous programme year.

Table 2.5: TEC – Key statistics for 2020/21 programme call

Number of services contracted to offer at least one strand	952
Number of services contracted with at least one child availing of TEC subsidy	228
Total number of children benefiting	431
Total number of families benefiting	304
Number of approved registrations	583
Total value of approved contracts	€1,220,429

Table 2.6: Number and percentage of services contracted to offer TEC and number of registrations per strand in 2020/21

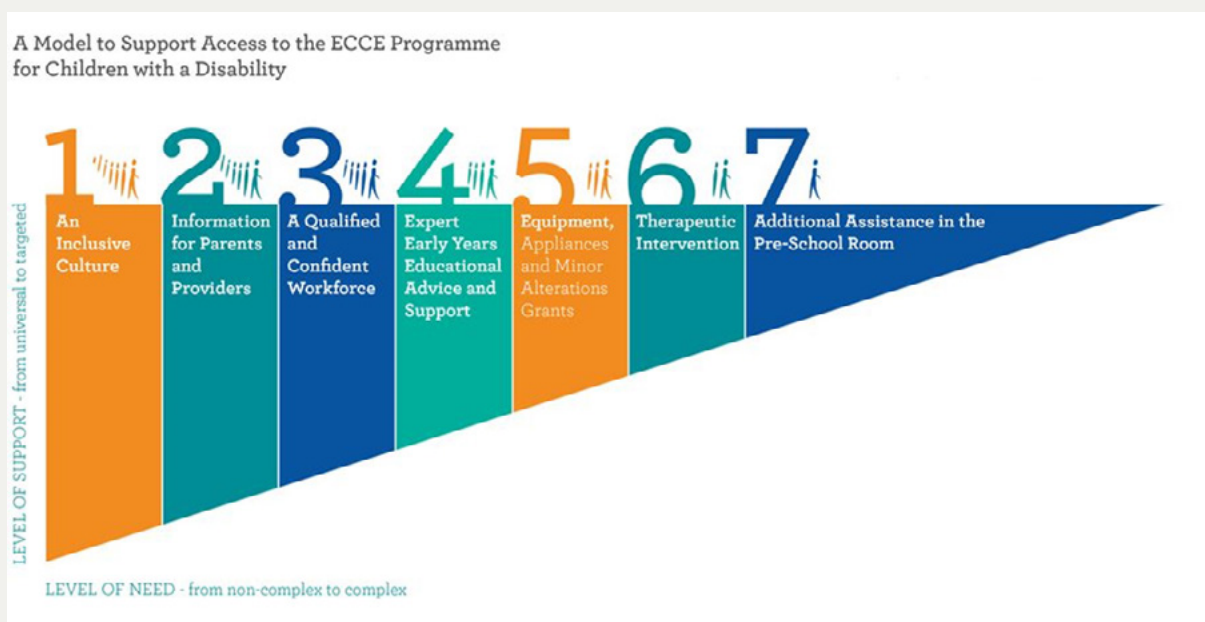
Strand	Number of services contracted	% of total TEC services	Number of approved registrations
ASCC	553	58%	14
CEC (AS)	628	66%	175
CEC (PS)	611	64%	198
CETS	887	93%	196
Total (offering at least one strand)	952	100%	583

2.6 AIM

AIM is a model of supports, introduced in 2016, designed to ensure that children with disabilities can access ECCE. Its goal is to empower providers to deliver an inclusive pre-school experience, ensuring that every eligible child can meaningfully participate in ECCE and benefit from a high-quality pre-school education.

AIM is a child-centred model involving seven levels of progressive support 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 disability¹⁸. AIM provides a suite of universal and targeted supports as shown in Figure 2.2.

Figure 2.2: AIM supports



AIM's universal support Levels 1 – 3 foster an inclusive culture in settings and include both training for services and information resources for parents. Supports are provided by CCCs, the Leadership for Inclusion in the Early Years Programme (LINC), 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 without a need for a formal diagnosis of disability. AIM Levels 4, 5 and 7 are delivered through Better Start, while Level 6 therapeutic supports are delivered through the HSE.

Under AIM Level 3, between September 2020 and July 2021, Better Start delivered 49 'Hanan' courses to 1,005 participants from 376 services and 10 'Lámh' courses to 109 participants from 60 services. Hanan 'Teacher Talk' courses were developed by The Hanan Centre, a not-for-profit charitable organisation, using a social entrepreneurial approach to enable young children to develop the best possible language and literacy skills. 'Lámh' is a manual sign system used by children and adults with intellectual disability and communication needs to support their communication.

18 Information about the Access and Inclusion Model (AIM) is available at the following link: <https://aim.gov.ie/>.

In 2020/21, 4,244 children across 2,045 services were supported under AIM. Relative to the previous year¹⁹, there was a 16% decrease in the number of services receiving support under AIM and a reduction of 26% in the number of children²⁰ receiving support. These decreases were largely a result of COVID-19 with parents of many children with additional needs supporting their children at home rather than availing of centre-based care.

In 2020/21, AIM Level 4 supports, where Better Start Early Years Specialists (EYS) provided onsite or online mentoring, were delivered to 1,671 services. EYS provided 16,622 supports to ELC services either by phone, email, video conferencing or onsite visits. In 2020/21, 2,991 children received AIM Level 4 support, a decrease of 24% on the previous year, with this decrease again due to COVID-19.

In 2020/21, 1,140 services were in receipt of AIM Level 7 supports which provide funding for staff to work an additional 10 or 15 hours per week to enable services to reduce the staff-to-child ratio in an ECCE room. The total number of children accessing AIM Level 7 supports in 2020/21 was 2,855, a decrease of 38% on the previous year. These children represented 2.7% of all children availing of ECCE during 2020/21, a significant reduction when compared with the percentage of children availing of ECCE in 2019/20 which stood at 4.3%. The decrease in the number of children supported under AIM Level 7 was a combination of the overall reduction in the number of children availing of AIM and the impact of Employment Wage Subsidy Scheme (EWSS)²¹.

AIM Level 5 consists of two different types of supports: funding towards minor alterations and access to specialist equipment for which there is a separate application process. In 2020/21, 210 services received AIM Level 5 supports, 25 received funding for alterations and 202 received support to purchase specialist equipment. Of these, 19 services received supports for both minor alterations and access to specialist equipment. The number of children availing of AIM Level 5 supports in 2020/21 was 223. Table 2.7 provides key statistics on AIM.

Table 2.7: AIM supports – Key statistics for 2020/21

Number of services availing of AIM supports	2,045
Total number of children availing of AIM supports	4,244
Total number of children availing of Level 4 supports	2,991
Total number of children availing of Level 5 supports	223
Total number of children availing of Level 7 supports	2,855
The number of supports provided to services by Better Start	16,622

19 Under the 2019/20 programme call, 2,428 services were supported under AIM.

20 Under the 2019/20 programme call, 5,708 children were supported under AIM.

21 A number of services opted to apply for the EWSS funding as an alternative to AIM Level 7.

2.7 DCEDIY funding programmes in 2020/21 – summary

Over the entire programme year, 169,579 children availed of **at least one of the DCEDIY funding programmes** (ECCE, NCS²², CCSP or TEC) and a total of €447,172,028 was paid in subsidies in 2020/21 for these programmes. The total number of children availing of DCEDIY funding programmes has decreased by 6% on the previous year and by 9% on 2018/19. In comparison, the total number of children enrolled nationally (see Section 5.2 on 'Enrolments') decreased by 12% on 2018/19. The rate of decrease has doubled on 2019/20, when a 3% reduction was recorded and tripled on 2018/19. The reduction in the numbers of children availing of DCEDIY funding programmes is driven by demographic changes and the lower number of ECCE eligible children as a consequence. The impact of COVID-19 on demand is another key reason for a drop in demand.

More than eight in every ten children²³ enrolled in services (84%) availed of a subsidy under the ECCE, NCS, CCSP or TEC.

The number of children supported over the last five years is included in Figure 2.3.

Figure 2.3: Total number of children supported under DCEDIY funding programmes between 2016/17 and 2020/21



Significant decreases in the number of children availing of CCSP and TEC, 53% and 81% respectively, have largely been prompted by the transfer of children from the legacy schemes to the NCS, with 18,372 moving from CCS or TEC in 2019/20 to NCS in 2020/21 and the closure of these schemes to new applicants since February 2020.

While the number of children participating in ECCE has decreased by 1% on the previous year, this reduction is smaller than the reduction in the total population of children eligible

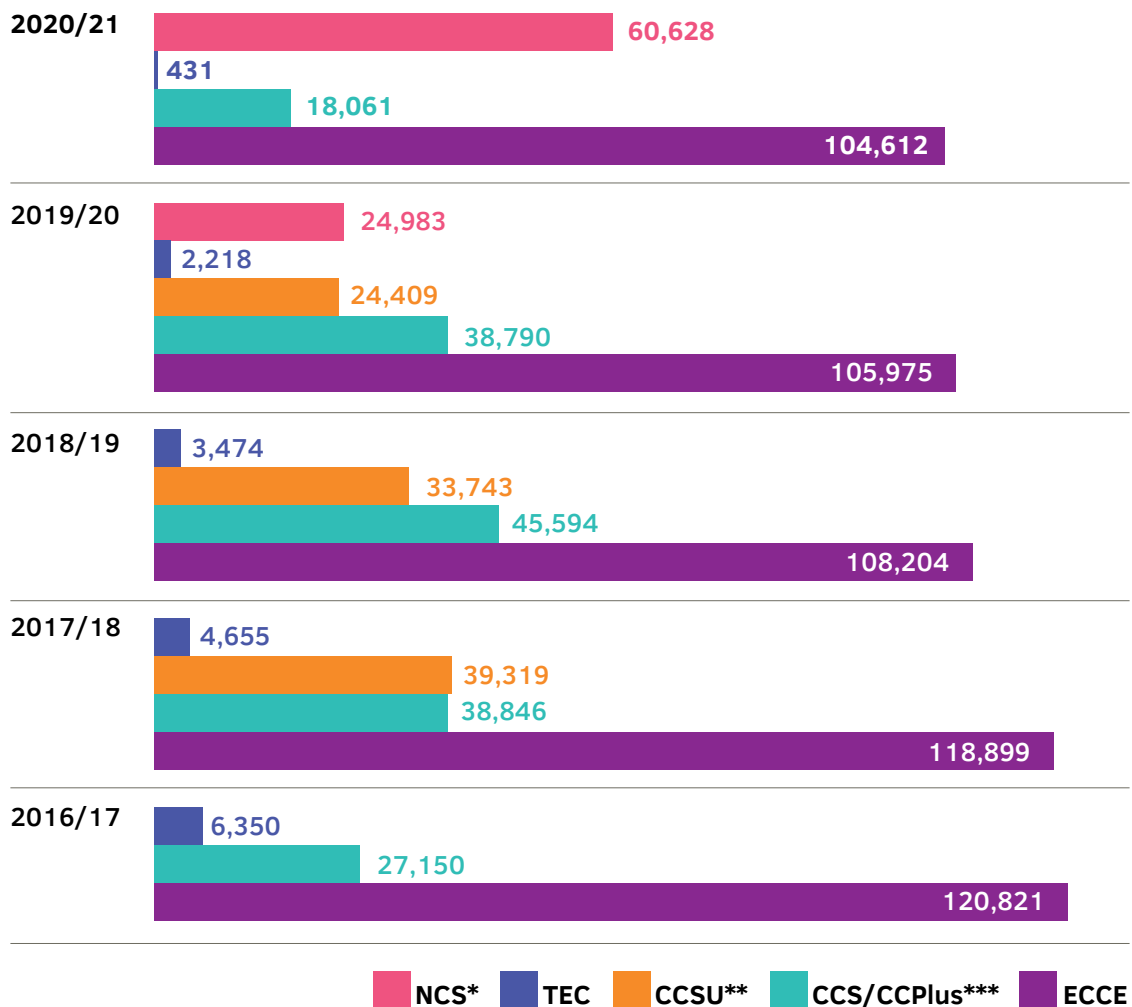
²² Note: NCS does not follow the same programme year structure as the other programmes (ECCE, CCSP and TEC).

²³ This figure was calculated using the total number of children enrolled on the DCEDIY funding programmes on 15 June, 2021 (approximately halfway through the data collection point for the Service Profile survey).

for the programme, of 3%, associated with the decline in the birth rates. The reduction in the number of children on ECCE did not directly correspond with the decrease in birth rates due to a higher number of children availing of ECCE for the second year.

The number of children participating in different DCEDIY funding programmes over the last five years is shown in Figure 2.4.

Figure 2.4: Number of children supported under ECCE, NCS*, CCS/CCSP, CCSU*** and TEC between 2016/17 and 2020/21**



Note: Changes to the ECCE programme rules introduced in 2018/19 (one entry point during the year in September) have impacted on the numbers of children availing of ECCE compared to the previous two years (three entry points during the year: September, January and April).

*NCS figures for 2019/20 related to the period between 20 November, 2019 and 24 August, 2020.

**CCSU first opened for registrations in the 2017/18 period so there is no comparative data from previous years. It incorporated into the NCS in 2020/21, hence the figures are not available for that year.

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

3 Profile of ELC and SAC services



KEY STATISTICS

4,527
services

contracted to deliver at least one of the DCEDIY funding programmes

89% offered ECCE

67% offered NCS

44% offered CCSP

21% offered TEC



Half
of services
had a capacity of up to
40 places

3 in 10
services

open for 15 hours or less

26%

were charged
commercial rates



3.1 Introduction

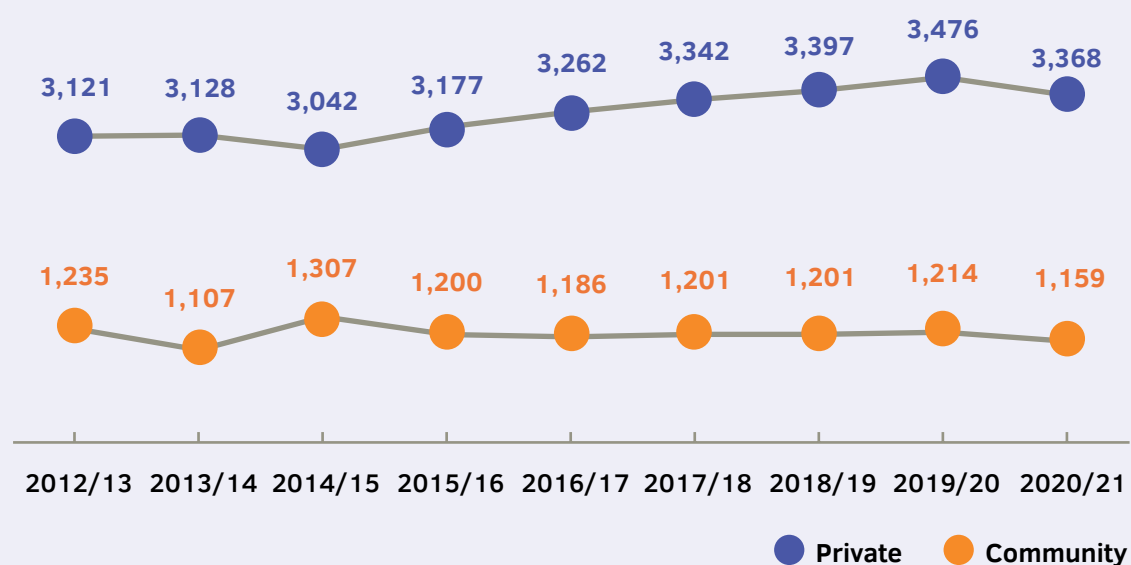
This chapter provides an overview of the main characteristics of Early Learning and Care (ELC) and School-Age Childcare (SAC) services in contract to deliver Department of Children, Equality, Disability, Integration and Youth (DCEDIY) funding programmes. These include the organisation type, geographical location, type of DCEDIY funding programme, types of service 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 captured from data recorded in the Programmes Implementation Platform (PIP) and Early Years Platform (EYP) which include all services contracted to deliver DCEDIY funding programmes and data collated through the Service Profile survey completed by 57% of services.

During the 2020/21 programme year, 4,527 services were contracted to provide at least one of the four DCEDIY funding programmes: the National Childcare Scheme (NCS), Early Childhood Care and Education (ECCE), Community Childcare Subvention Plus (CCSP) and/or Training and Employment Childcare (TEC). Compared to 2019/20, 163 less services (4%) were contracted to deliver these programmes.

3.2 Types of service and geographical distribution

In Ireland, the majority of ELC and SAC services are operated by private (for profit) organisations. In 2020/21, private services accounted for 74% (3,368) of all services contracted to provide at least one of the DCEDIY funding programmes, with community services accounting for the remaining 26% (1,159) – the same proportion as in 2019/20.

Figure 3.1: Number of ELC and SAC services by organisation type 2012/13–2020/21



65% (2,943) of services were located in urban areas and 35% (1,584) were located in rural areas. Table 3.1 shows the overall urban/rural distribution of community and private services over the last four years.

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

	2017/18		2018/19		2019/20		2020/21	
	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural
All services	66%	34%	66%	34%	65%	35%	65%	35%
Private	69%	31%	68%	32%	68%	32%	68%	32%
Community	58%	42%	58%	42%	58%	42%	56%	44%

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

The vast majority of services were located in areas classified either marginally above or below average (84%). By comparison, according to the 2016 Census, 73% of the Irish population lives in these areas. Community services are more likely to be located in less affluent areas compared to private services. The number of community services located in marginally below average areas (620) is almost twice the number of those located in areas that are marginally above average (318). 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 or very disadvantaged areas where 16% of community services were located compared to 4% of private services.

Of the 21 services operating in very and extremely disadvantaged areas, all were community services. Only one service was located in extremely disadvantaged areas, despite 2.9% of the population residing in these locations.

Figure 3.2: Number of ELC and SAC services by the level of disadvantage of the area where the service is located

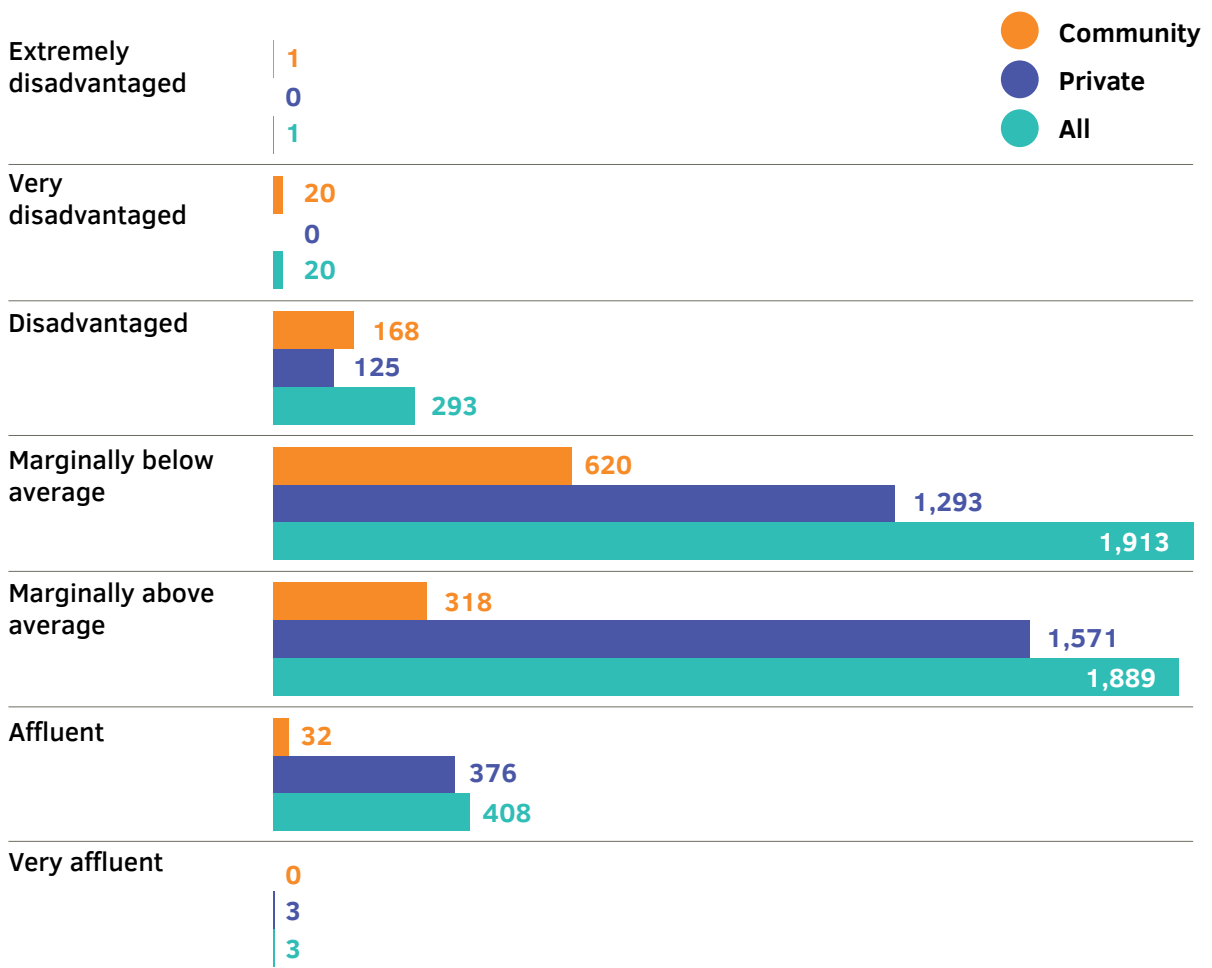
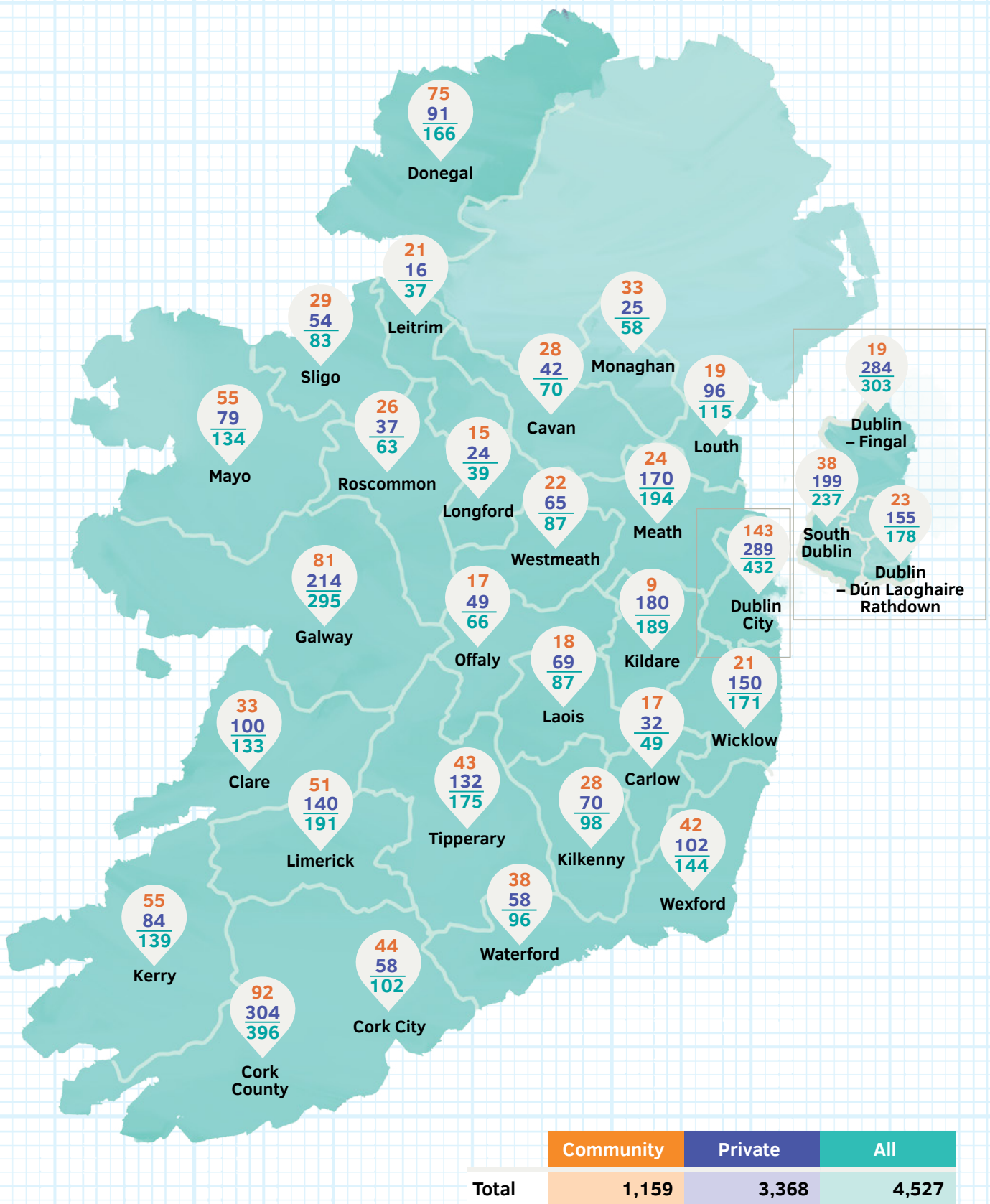


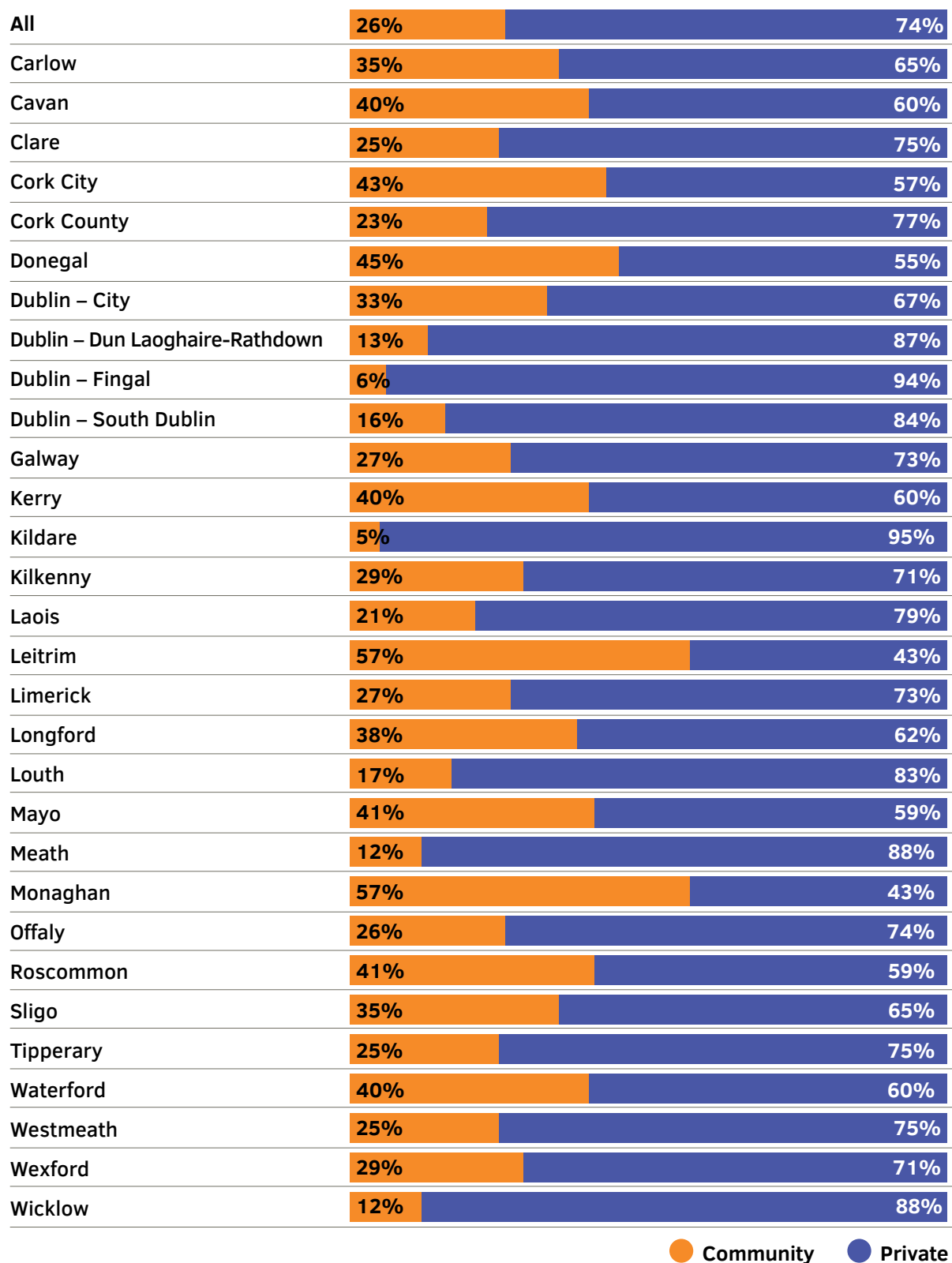
Figure 3.3 presents the county breakdown of services by organisation type including the total number of services in a county. The ratio of community to private service providers varies significantly between counties (see Figure 3.4). Similar to 2019/20, the counties with the highest proportions of community services are Monaghan (57%), Leitrim (57%) and Donegal (45%). The counties with the lowest proportion of community services are generally located in Dublin and the Mid-Eastern region: Kildare (5%), Fingal (6%), Meath (12%), Wicklow (12%), Dún Laoghaire-Rathdown (13%), South Dublin (16%) and Louth (17%).

Figure 3.3: County breakdown of ELC and SAC services by organisation type



The total number of services has declined in most counties, with the highest drop recorded in South Dublin (8%) and Kilkenny, Limerick, Meath and Offaly (7%). The number of services increased in six counties, with the highest increase recorded in Sligo at 6%. The number of services remained the same in Westmeath.

Figure 3.4: County breakdown of ELC and SAC services by organisation type



3.3 DCEDIY funding programmes

In 2020/21, ELC and SAC services could contract to offer up to four DCEDIY funding programmes. ECCE has the highest level of uptake, with 89% of services offering this programme (4,022). By comparison, in 2019/20, 202 more services offered ECCE (90% of all services). The proportion of services offering CCSP and TEC fell to 44% from 68% and to 21% from 34% in 2019/20 respectively. This is a result of the introduction of the NCS which replaces CCSP and TEC with a single, streamlined scheme. The proportion of services offering the NCS²⁴ has increased by 16% on the previous year. Table 3.2 provides a breakdown of services by DCEDIY funding programme in 2020/21 and by organisation type. A higher proportion of private services offer ECCE (90%) compared to 85% of community services, while community services are more likely to offer CCSP and TEC in addition to the NCS.

Table 3.2: Number and percentage of ELC and SAC services by funding programme

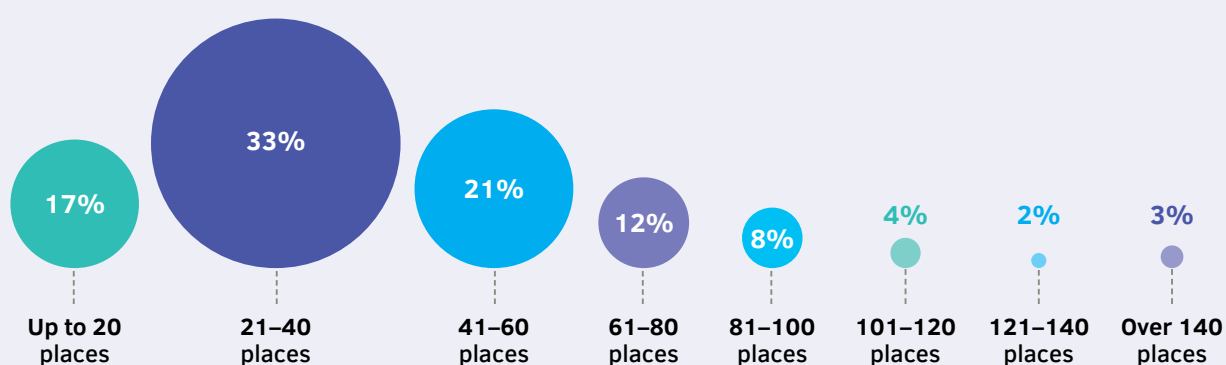
Funding programme	Community	Community %	Private	Private %	Total number of services	% of all participating services
ECCE	983	85%	3,039	90%	4,022	89%
NCS	911	79%	2,140	64%	3,051	67%
CCSP	758	65%	1,226	36%	1,984	44%
TEC	385	33%	567	17%	952	21%

3.4 Size of ELC and SAC services

Half of the services who responded to the survey (1,258 or 50%) had capacity of up to 40 places in their service (sum of children enrolled and vacant places). Almost one in ten (258 or 9%) had capacity to cater for more than 100 children (see Figure 3.5). The largest service, with capacity of 355 places, was located in Dublin City, while the smallest was in Meath, with a reported capacity of three places (a childminding service).

Community services were larger, with an average capacity of 58 places, compared to 47 in private services. Services in urban areas were also larger, with an average capacity of 52, compared to 47 in rural areas.

Figure 3.5: Size of ELC and SAC services by number of places (children enrolled + vacant places)



24 Contracts for the NCS do not follow the traditional school year like the other programmes. The NCS data shows services which had an active NCS 2019 contract and/or had also signed an NCS 2020 contract at the snapshot date.

3.5 Types of ELC and SAC provision

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 87% of services offering this type of service (see Figure 3.6).

Compared to 2019/20, the proportion of services offering different service types remains similar (all are within 3% of last year's figures). 3% more services offered 'sessional a.m.' and 3% less offered breakfast club and SAC.

Figure 3.6: Number and percentage of ELC and SAC services by service type offered

Sessional a.m.	2,189	87%
Part-time	1,036	41%
SAC	995	39%
Full day	854	34%
Sessional p.m.	677	27%
Breakfast club	535	21%
Drop-in	34	1%
Total	2,520	100%

Out of 2,520 survey respondents, 995 (39%) indicated that they provided in term SAC, 3% less than last year. 790 (31%) reported offering out of term SAC, 1% more than in 2019/20. Community services are more likely to offer SAC, both in term (43%) and out of term (37%), when compared to private services (38% and 29% respectively). Services located in rural areas are more likely to offer SAC in term, while a higher proportion of those operating in urban areas offer SAC out of term. For a detailed breakdown see Table 3.3.

Table 3.3: Percentage of ELC and SAC services offering SAC by type of provider and urban/rural

	Community (n=805)	Private (n=1,715)	Urban (n=1,594)	Rural (n=926)	All (n=2,520)
% of services offering SAC in term	43%	38%	38%	42%	39%
% of services offering SAC out of term	37%	29%	33%	28%	31%

3.6 Opening hours and weeks

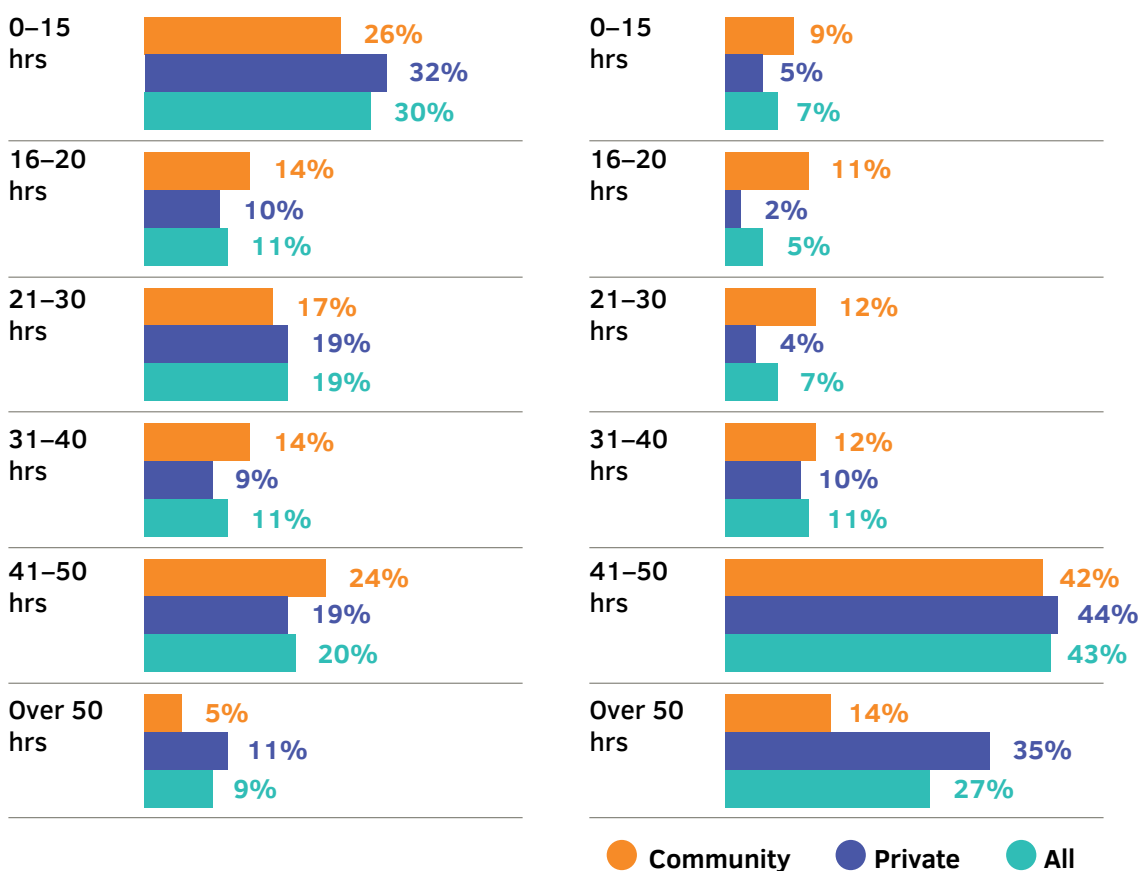
This year’s survey asked services how many hours they operate per week in term and out of term time, as well as how many weeks per year they operate.

Figure 3.7 outlines the percentage of services by the number of hours services operate per week during term time. Almost one third of services (30%) operate 15 hours or less during term time. Private services (32%) are more likely to be open for 15 hours or less than community services (26%).

29% of services open for more than 40 hours a week in term. Of these, community services are more likely to open between 41 and 50 hours (24%), while private services are more likely to open for over 50 hours a week (11%).

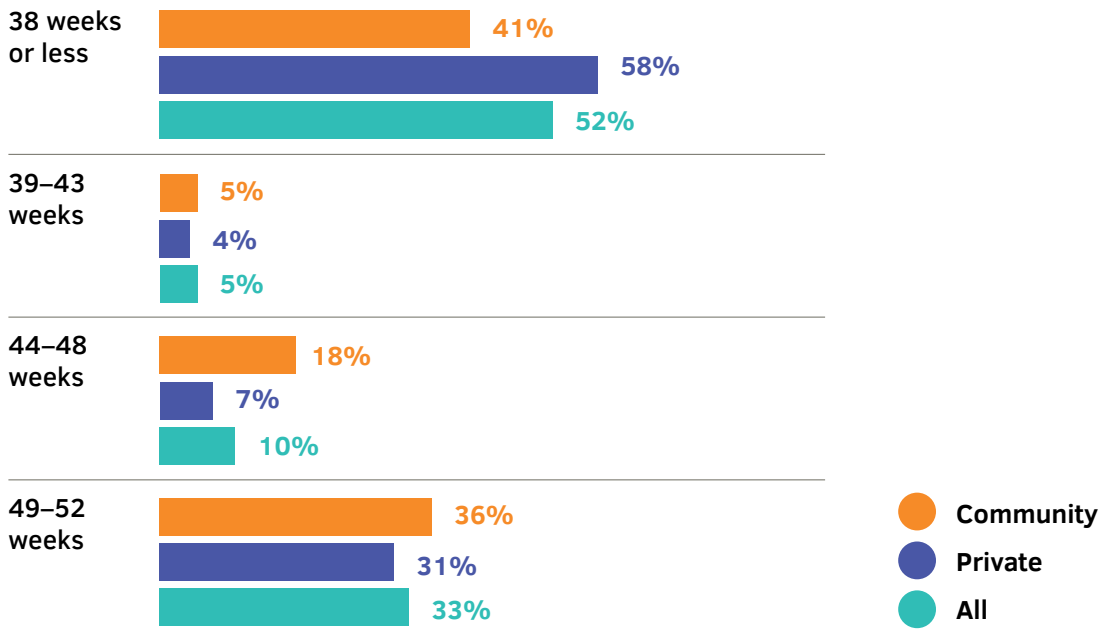
Of the 2,520 services who responded to the survey, 1,142 indicated that they are open out of term (45%). Figure 3.8 presents the percentage of services by number of operating hours per week (out of term). Of the services that open out of term time, the majority (70%) operate over 40 hours per week. Private services are more likely to operate during these hours (79%) than community services (56%).

Percentage of ELC and SAC services by number of hours services operated per week
Figure 3.7: (in term) **Figure 3.8: (out of term)**



Over half of services (52%) are open for 38 weeks or less. Private services are more likely to open for 38 weeks or less (58%) compared to community services (41%). One third of services (33%) operate between 49 and 52 weeks per year. This includes 36% of community services and 31% of private services. 15% of services open between 39 and 48 weeks per year. For a detailed breakdown see Figure 3.9.

Figure 3.9: Percentage of ELC and SAC services by number of weeks per year services operate



3.7 Commercial rates

One quarter of ELC and SAC services (26%) who responded to the Service Profile survey reported being charged commercial rates in 2020/21. This is a 1% increase on 2019/20 when the lowest proportion (25%) was recorded since 2014/15. The lower percentage of services billed for rates over the past two years may be linked to the temporary suspension of rates due to COVID-19. Table 3.4 shows the percentage of services which have been billed for rates each year since 2015/16.

Table 3.4: Percentage of services billed for rates between 2014/15 and 2020/21

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
% of services billed for rates	35%	32%	29%	31%	31%	25%	26%

There are differences in the types of services who reported being billed for rates. As in previous years, private services (34%) and those in urban areas (31%) are more likely to be charged for commercial rates. In 2020/21, 10% of community services reported being billed for rates, a 3% increase on 2019/20 but lower than the pre COVID-19 rate of 14% in 2018/19. A detailed breakdown is shown in Table 3.5.

Table 3.5: Percentage of services billed for commercial rates

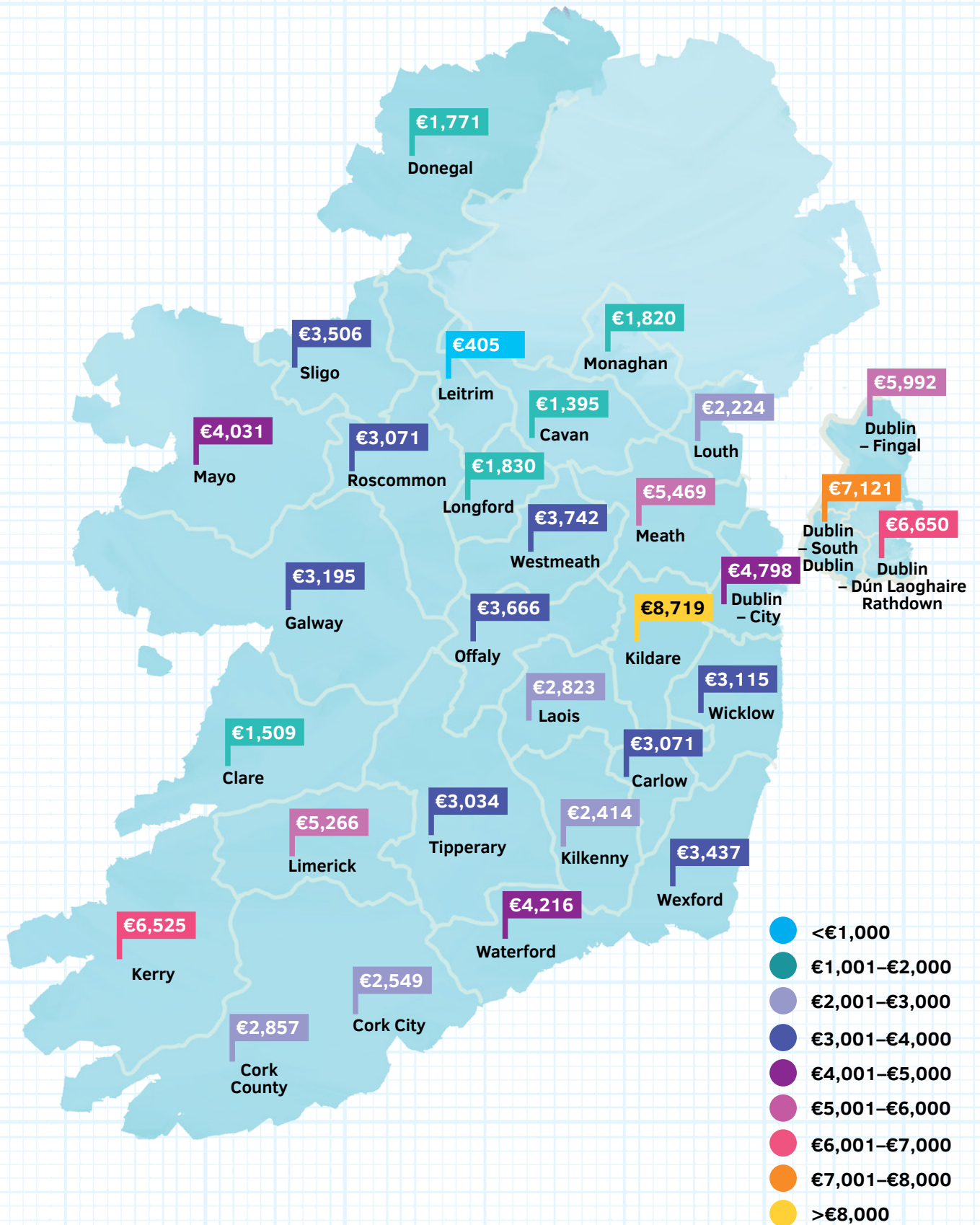
Billed for rates	Community	Private	Urban	Rural	All
Yes	10%	34%	31%	19%	26%
No	90%	66%	69%	81%	74%
Total number of services	805	1,715	1,594	926	2,520

Nationally, the average rate that services were billed for in 2020/21 was €4,093. This represents a reduction of 10% from €4,546 in 2019/20 and 14% in 2018/19. The local authorities have autonomy as to how they apply the levy and collect the rates²⁵ which results in significant differences between counties.

Figure 3.10 shows the average value of commercial rates charged to ELC and SAC services at county level. The highest rates were charged in Kildare, Dublin (South Dublin, Dún Laoghaire-Rathdown), Kerry, Dublin – Fingal, Meath and Limerick. The average rates charged in Kildare were €8,719 compared to the lowest average county rate of €405 in Leitrim.

25 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 3.10: County average of most recent commercial rates bill among ELC and SAC services



The level of rates charged varies also depending on the type of provider. Table 3.6 shows the changes in commercial rates (by bands) over the last three years by organisation type. Almost three quarters of services (74%) were charged rates of €5,000 or below in 2020/21, while 7% of services paid rates above €10,000. Community services²⁶ usually pay lower rates, with 55% paying less than €1,000 compared to only 14% of private services. In 2020/21, the proportion of services paying higher rates (€5,000 and above) was 26% which was similar to the 25% recorded in 2019/20 and lower than 30% in the pre-COVID-19 2018/19 year.

Table 3.6: Rates bills (in bands) by ELC and SAC organisation type between 2018/19–2020/21

	Community			Private			All		
	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21
Under €1,000	46%	46%	55%	16%	15%	14%	20%	19%	19%
€1,000–€4,999	35%	44%	34%	52%	57%	57%	50%	54%	55%
€5,000–€10,000	13%	5%	7%	19%	22%	21%	18%	18%	19%
Over €10,000	7%	5%	4%	13%	7%	8%	12%	7%	7%

3.8 Outdoor spaces

The vast majority of ELC and SAC services (97%) reported having an outdoor space. This figure remains unchanged since 2019/20.

3.9 Services provided through the medium of Irish

In 2020/21, 7% of services (185 services) reported providing ELC and SAC through the medium of Irish. This is a slight decrease on 2019/20 which stood at 8%. Of the 185 services, 109 (59%) are private and the remaining 76 (41%) are community services. 60% of services providing ELC and SAC through the medium of Irish were located in urban areas and the remaining 40% in rural locations.

3.10 Provision of food

Services were asked whether they had kitchen facilities on their premises. 1,742 services (69%) reported having a kitchen on their premises. Of these services, 1,247 (50%) had kitchen facilities which enabled them to serve hot food.

²⁶ Note: Community services are excluded from paying rates. However, as many community services operate as part of a bigger community organisation, their umbrella organisation may still be charged such rates and, therefore, these are reported by some community services.

3.11 Rooms

In 2020/21, for the first time, services were asked to provide information about the number of rooms available in their service for the provision of ELC and SAC. In total, 2,520 services who responded to the survey reported 6,278 rooms. This is an average of 2.5 rooms per service. The highest percentage of services had one room (43%), followed by those with two rooms (22%), see Figure 3.11.

Figure 3.11: Number of ELC and SAC services by the number of rooms

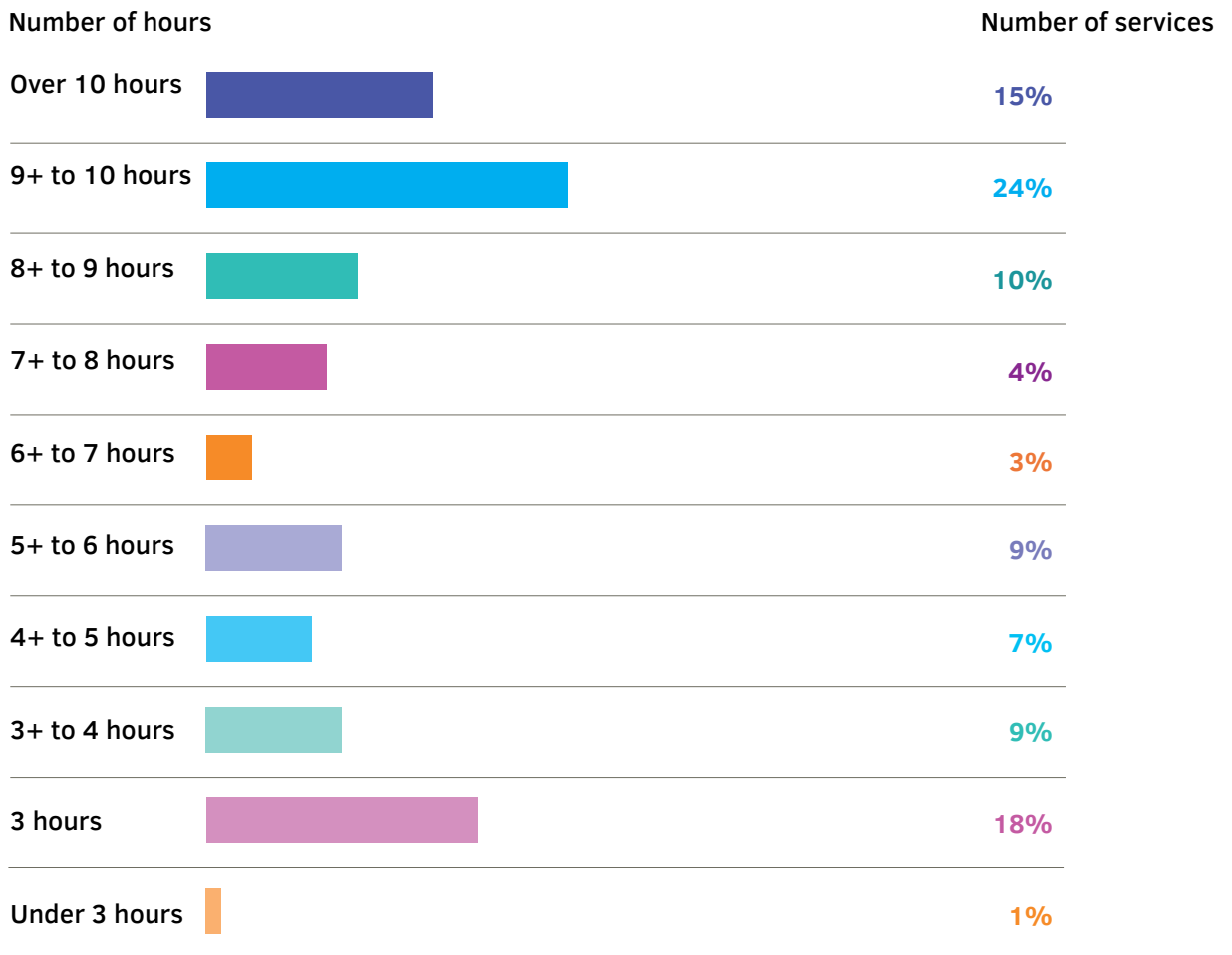
Number of rooms		Number of services
1	1,075	43%
2	547	22%
3	309	12%
4	239	9%
5	160	6%
6	81	3%
7	47	2%
8	22	1%
9	16	1%
10 and over	24	1%

On average, 14 children used a room on a typical day. The average number of hours a room was open was 7.3 hours. The highest percentage of rooms operate over nine to ten hours per day (24%), followed by those operating for three hours per day (18%). See Figure 3.12 for a detailed breakdown.

Just over half of all rooms were used for ECCE children (51%), with a further 25% used for toddlers and babies. 13% of rooms were used for a combination of age groups.

37% of rooms were used for sessional services, followed by 29% used for combination of different types of provision and 23% for full-time. The remaining 11% of rooms were used for part-time provision.

Figure 3.12: Percentage of ELC and SAC rooms by the number of hours they are in use



4 Children in ELC and SAC settings



KEY STATISTICS

12,387
one parent
families

availing of ELC and SAC services
(reported)

12,883
children

with neither English nor Irish
as their first language attending
(reported)

17%
of services

had at least one Traveller
child attending

7%
of services

had at least one Roma
child attending

7,284
children

with additional needs
attended ELC and SAC services

7%

of all children enrolled
(reported)

81%
of services

have wheelchair access
to their building



4.1 Introduction

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

This chapter looks specifically at equality, diversity and inclusion in relation to children in services. 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 children with disabilities. Respondents to the Service Profile survey were asked to provide this information, to the best of their knowledge, in relation the children attending their services.

4.2 Equality and diversity

4.2.1 One-parent families

Almost three quarters of survey respondents (73% or 1,832 services) reported having children attending their services who come from one-parent families (see Table 4.1 and Table 4.2). This is down 4% on 2019/20.

According to the most recent Census data (2016), 218,817 one-parent families were living in Ireland, with one in five (20%) of all children in Ireland living in one-parent families. In the 2020/21 Service Profile survey, services reported 12,387 one-parent families availing of ELC and SAC services. Of these, 43% (5,346) availed of ECCE, a decrease of 3% on the previous year. Over half of one-parent families (51%) availed of ELC and SAC services from community services, a slight decrease from 53% in 2019/20. The majority of children from one-parent families attended services located in urban areas (78%).

Table 4.1: Number of ELC and SAC services with children from one-parent families by service type

	Community	Private	All
Number of services with children from one-parent families	689	1,143	1,832
% of services with children from one-parent families	86%	67%	73%
Number of one-parent families using ELC/SAC services	6,329	6,058	12,387
Distribution of one-parent families using ELC/SAC services by provider type	51%	49%	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	1,247	585	1,832
% of services with children from one-parent families	78%	63%	73%
Number of one-parent families using ELC/SAC services	9,682	2,705	12,387
Distribution of one-parent families using ELC/SAC services by provider type	78%	22%	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 of this. As Table 4.3 and Table 4.4 show, 65% of services reported having at least one child for whom neither English nor Irish was a first language, down 4% on 2019/20. In total, these services reported 12,883 children in this cohort. In addition, 8,060 (63%) children from this cohort availed of ECCE, a significantly higher proportion when compared to children from other groups described in this section, with the exception of children with additional needs (65%).

Table 4.3 and Table 4.4 present the breakdown of services and children by provider type and location. As in previous years, children for whom neither English nor Irish is a first language are more likely to attend services in urban areas (87%) and to use private services (65%). The distribution of these children by provider 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	546	1,095	1,641
% of services with children with neither English nor Irish as their first language	68%	64%	65%
Number of children with neither English nor Irish as their first language	4,459	8,424	12,883
Distribution of children with neither English nor Irish as their first language by provider type	35%	65%	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	1,217	424	1,641
% of services with children with neither English nor Irish as their first language	76%	46%	65%
Number of children with neither English nor Irish as their first language	11,212	1,671	12,883
Distribution of children with neither English nor Irish as their first language by provider type	87%	13%	100%

4.2.3 Traveller and Roma children

In the 2020/21 survey, 426 services reported having at least one Traveller child attending their service. This represents 17% of respondents, slightly lower than last year at 18%. In total, services reported 1,866 Traveller children attending²⁷ their service, which represents 1.8% of all children enrolled reported by the services, a 0.3% higher proportion than in 2018/19. Of these children, 42% availed of ECCE (779).

Table 4.5 and Table 4.6 show the breakdown of Traveller children in services by organisation type and location. As in previous years, the majority of Traveller children (62%) attended community services, 3% more than in 2019/20. The majority of Traveller children attended services based in urban areas (85%), 3% less than 2019/20.

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	229	197	426
% of services with Traveller children attending	28%	11%	17%
Number of Traveller children attending	1,164	702	1,866
Distribution of Traveller children attending by provider type	62%	38%	100%

Table 4.6: Number of Traveller children in ELC and SAC services across urban and rural regions

	Urban	Rural	All
Number of services with Traveller children attending	345	81	426
% of services with Traveller children attending	22%	9%	17%
Number of Traveller children attending	1,578	288	1,866
Distribution of Traveller children attending by provider type	85%	15%	100%

In 2020/21, 179 services reported having at least one Roma child attending their service (7% of all survey respondents). In total, 507 Roma children were reported²⁸ to be enrolled in ELC and SAC services (0.5% of all children enrolled), a slightly higher proportion than in 2018/19 (0.4%). Of these children, 57% availed of ECCE (287).

Table 4.7 and Table 4.8 show the breakdown of Roma children in services by organisation type and location. The majority of Roma children were enrolled in private services (55%), 8% less than in 2019/20. As in previous years, the vast majority of Roma children attended services in urban areas. However, the number attending services in urban areas increased by 5% on the previous year to 92%.

27 The number of Traveller children was not extrapolated to national levels this year as due to a much lower survey response rate than in previous years, the accuracy of such extrapolations could not be guaranteed due to uneven distribution of the Traveller population across Ireland.

28 The number of Roma children was not extrapolated to national levels this year as due to a much lower survey response rate than in previous years, the accuracy of such extrapolations could not be guaranteed due to uneven distribution of the Roma population across Ireland.

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	75	104	179
% of services with Roma children attending	9%	6%	7%
Number of Roma children attending	227	280	507
Distribution of Roma children attending by provider type	45%	55%	100%

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	158	21	179
% of services with Roma children attending	10%	2%	7%
Number of Roma children attending	465	42	507
Distribution of Roma children attending by provider type	92%	8%	100%

4.3 Disability

4.3.1 Children with disabilities and/or additional needs²⁹

Survey respondents were asked to specify the number of children with disabilities and/or additional needs (diagnosed or undiagnosed) attending their services. The breakdown by organisation type is presented in Table 4.9. Three quarters of services (75%) reported having at least one child with a disability and/or additional needs³⁰ attending their service, a similar proportion to 2019/20 figure of 74%. These children represented 7% of all children enrolled, the same proportion as in 2018/19. By comparison, 45% of all services in Ireland participated in AIM in 2020/21. In total, services reported 7,284 children with disabilities and/or additional needs attending their services in 2020/21, with 65% availing of ECCE.

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

	Community		Private		All	
	Services	Children	Services	Children	Services	Children
Number of services/children with disabilities and/or additional needs	649	3,001	1,236	4,283	1,885	7,284

²⁹ Children with additional needs can be described as those with any of a range of difficulties (such as a physical, emotional, behavioral or learning disability or impairment) which cause an individual to require additional or specialised services or accommodations (such as in education or recreation). Source: <https://www.merriam-webster.com/dictionary/special%20needs>

³⁰ This includes children with diagnosed and undiagnosed additional needs.

4.3.2 Breakdown of children with a diagnosed disability

Services were asked to provide a breakdown of children from this cohort against a prescribed list of disability categories (as diagnosed by the Health Service Executive (HSE)). Children with multiple disabilities (i.e. 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/intellectual disability (2,113), while the smallest group was children with a physical disability (469).

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
Learning/intellectual disability	362	885	628	1,228	990	2,113
Other disability	174	374	259	439	433	813
Sensory impairment	153	261	222	308	375	569
Global developmental delay	145	260	220	289	365	549
Physical disability	132	211	215	258	347	469

4.3.3 Wheelchair access

In 2020/21, services were asked two questions about wheelchair access at their service. One question was on access to their building and the second about wheelchair access to the grounds of their service.

Four in five services (81%) reported their building as being wheelchair accessible. Community services were more likely to be wheelchair accessible (86%) than private services (79%). Variations exist geographically with more services in rural areas (87%) than in urban areas (78%) having wheelchair access to their building. The percentage of wheelchair-accessible buildings ranges from 63% in Dublin – Fingal and 68% in Dún Laoghaire-Rathdown local authorities to over 90% in counties Monaghan (91%), Roscommon (95%) and Cavan (95%).

A higher proportion of services (88%) reported having wheelchair access to their grounds. As with wheelchair access to their buildings, community services (92%) and those located in rural areas (87%) were more likely to have wheelchair access to their grounds.

5

ELC and SAC places



KEY STATISTICS

The existing **national capacity** would cater for estimated

220,500
children

An estimated

181,565
children

were enrolled in
ELC and SAC services

12%

decrease
on 2018/19



7 in 10
children

were aged between
3 and 6 years

38,935

estimated
vacant places

up 213%

since 2018/19



The average number of

children

enrolled per service is

41



6 less than
two years ago

22%

of services

were planning to increase
the number of places

3%

less than
in 2018/19



5.1 Introduction

This chapter presents analysis and trends on the number of children enrolled and on waiting lists as well as the number of vacant ELC and SAC places across different age cohorts and types of provision. The chapter concludes with the analysis of the existing capacity within the sector and expected changes in the number of places that will be offered in future. As data on capacity was not reported on in 2019/20, comparisons are made to the last year when data was available – 2018/19.

Extrapolations of the number of children enrolled, vacant places and children on waiting lists were not carried out for each individual age group due to a small proportion of services offering care for children aged up to 1 year (15% of all services) and 1 year+ to 2 years (27%) and their uneven distribution across the country and the fact that only 15% of services offered care for this age group. The data validation checks have shown that extrapolations on such small numbers carried significant risks to the accuracy of data presented. Instead, extrapolations were made at the aggregated level for three age groups: up to 3 years, 3 years+ to 6 years and 6 years+. The detailed breakdown for each age group was only presented for the reported figures.

In 2020/21, ELC and SAC services reported a total of **103,870 children enrolled** and **22,274 vacant ELC and SAC places** across Ireland. In 2020/21, for children aged 4+ to 6 years, services were asked to report separately on the number of non-schoolgoing and schoolgoing children.

Table 5.1 presents the number of children enrolled, on waiting lists and the number of vacant ELC and SAC places by age range. A detailed analysis of this data is included in the subsequent sections in this chapter. A county level breakdown of this data is also included in the accompanying dashboard³¹.

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

	Children enrolled	Vacant places	Waiting list
Up to 1 year (0–12 months)	1,241	251	1,960
1 year+ to 2 years (13–24 months)	5,506	575	3,580
2 years+ to 3 years (25–36 months)	11,246	1,958	4,454
3 years+ to 4 years (37–48 months)	29,632	4,899	5,450
4 years+ to 5 years (49–60 months) Non-school going	26,922	3,297	2,819
4 years+ to 5 years (49–60 months) Schoolgoing	5,848	2,432	992
5 years+ to 6 years (61–72 months) Non-school going	3,484	1,036	352
5 years+ to 6 years (61–72 months) Schoolgoing	6,184	2,958	1,133
6 years+ to 8 years (73–96 months)	6,997	2,566	803
8 years+	6,810	2,302	761
Total	103,870	22,274	22,304

In 2020/21, services reported 120,011 children enrolled and 21,924 on waiting lists across different types of service provision. The number of vacant ELC and SAC places was 25,358. The totals in each category are greater than the figures by age as one child may avail of more than one service type. The breakdown of children enrolled, on waiting lists and vacant places by service type is presented in Table 5.2.

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

	Children enrolled	Vacant places	Waiting lists
Full day	23,201	2,795	7,471
Part-time	14,908	3,583	5,140
Sessional a.m.	46,793	5,820	5,339
Sessional p.m.	8,860	3,329	1,076
SAC in term only	20,390	5,882	2,539
Breakfast club	5,693	3,844	343
Drop-in	166	105	16
Total	120,011	25,358	21,924

31 To access the dashboard please go to: <https://www.pobal.ie/research-analysis/early-years/>

Table 5.3 presents the number and percentage of services and the age groups they cater for. 91% of services offer ELC to children aged 3+ to 4 years. As in previous years, the smallest share of services offers places for babies (0–12 months) – the percentage of services who offer this type of provision was 15%, down 3% from the last time data was reported in 2018/19.

Table 5.3: Number and percentage of services catering for different age ranges

Age range	Number of services	% of services
Up to 1 year (0–12 months)	383	15%
1 year+ to 2 years (13–24 months)	683	27%
2 years+ to 3 years (25–36 months)	1,416	56%
3 years+ to 4 years (37–48 months)	2,300	91%
4 years+ to 5 years (49–60 months) Non-schoolgoing	2,127	84%
4 years+ to 5 years (49–60 months) Schoolgoing	976	39%
5 years+ to 6 years (61–72 months) Non-schoolgoing	813	32%
5 years+ to 6 years (61–72 months) Schoolgoing	1,019	40%
6 years+ to 8 years (73–96 months)	980	39%
8 years+	901	36%
Total	2,520	100%

5.2 Enrolments

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

Survey respondents reported a total of **103,870** children enrolled by age. Based on the extrapolation, (factoring for non-respondents), it was estimated that **approximately 181,565 children were enrolled nationally** at the time of the survey. This was a decrease of 12% compared to 2018/19 when the data was last available. While reductions were recorded for all age groups, these have not been distributed equally across different age groups. The largest decreases were observed for children aged 6 years+ (31%) and children up to 3 years (19%). These decreases can be explained by new and extended entitlement to paid parent's leave for children under two and by the impact of COVID-19 on the uptake of ELC and in particular, SAC places in 2020/21. Table 5.4 shows the breakdown of the extrapolated number of children enrolled by age group over the last three years.

Table 5.4: Number of children enrolled by age range for 2017/18, 2018/19 and 2020/21 (extrapolated)

Age range	Extrapolated			Difference between 2018/19 and 2020/21
	2017/18	2018/19	2020/21	
Up to 3 years (0–36 months)	36,775	38,718	31,451	-19%
3 years+ to 6 years (37–72 months)	136,269	132,412	125,979	-5%
6 years+	29,589	35,171	24,135	-31%
Total	202,633	206,301	181,565	-12%

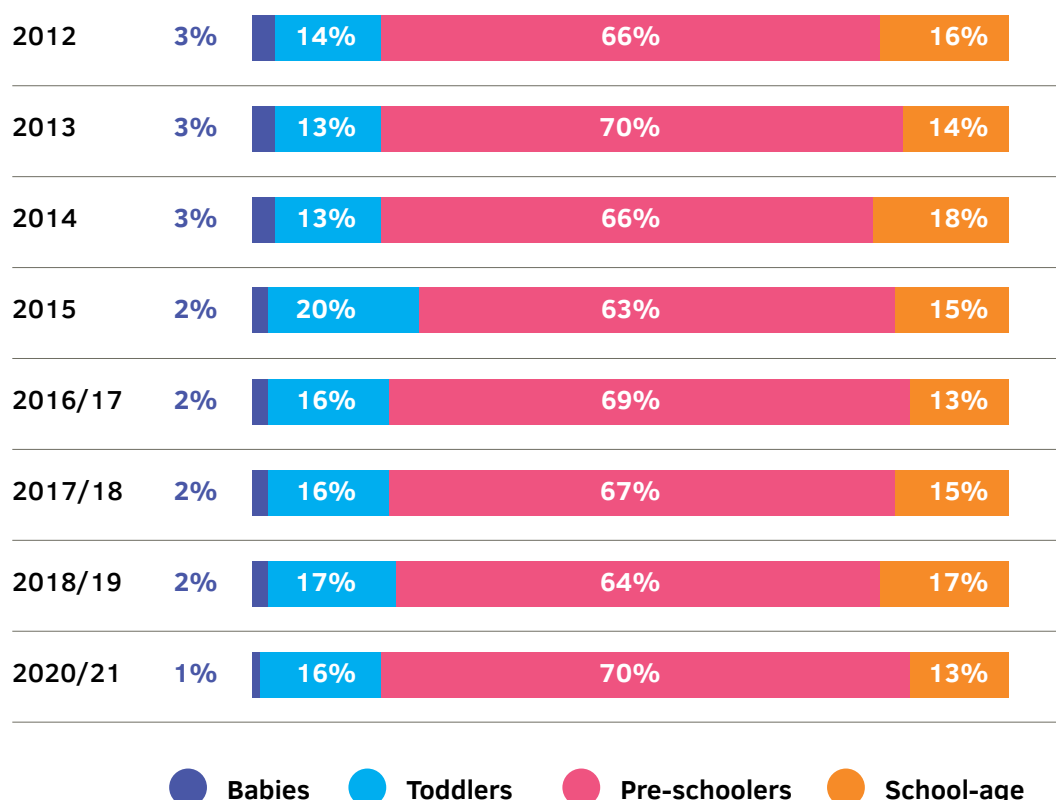
In 2020/21, **the average number of children enrolled in an ELC service was 41**. This represents an average decrease of six children per service on 2018/19. Services in urban locations are larger, with 43 children on average, compared to 38 in rural services. Community services are also bigger, with 47 children on average, while private services cater for 39 children on average.

Table 5.5 presents the breakdown of children enrolled by age cohort in 2020/21. As in previous years, the children aged between 3+ and 6 years (pre-schoolers) are the largest cohort accounting for 70% of all children enrolled. This proportion increased by 6% since 2018/19 and for the first time since 2016/17. The cohort with the smallest share is babies (up to 1 year old) who account for 1% of all children enrolled. The share of babies in the number of children enrolled halved from 2% two years ago, reaching the lowest level since 2014 when they accounted for 3% of all children. The share of school-age children has also decreased for the first time since 2016/17, (by 4% over the last two years), which is a likely impact of COVID-19 on the demand for SAC. Figure 5.1 shows the proportion of children enrolled by stage of childhood since 2012.

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

Stage in childhood	Age range	Number	% of those enrolled
Babies	Up to 1 year (0–12 months)	1,241	1%
Toddlers	1 year+ to 3 years (13–36 months)	16,752	16%
Pre-schoolers (non-schoolgoing and schoolgoing)	3 years+ to 6 years (37–72 months)	72,070	70%
	3 years+ to 6 years (37–72 months) (Non-schoolgoing)	60,038	
	4 years+ to 6 years (37–72 months) (Schoolgoing)	12,032	
School-age	6 years+	13,807	13%
Total		103,870	100%

Figure 5.1: Percentage of children enrolled by stage of childhood 2012–2020/21

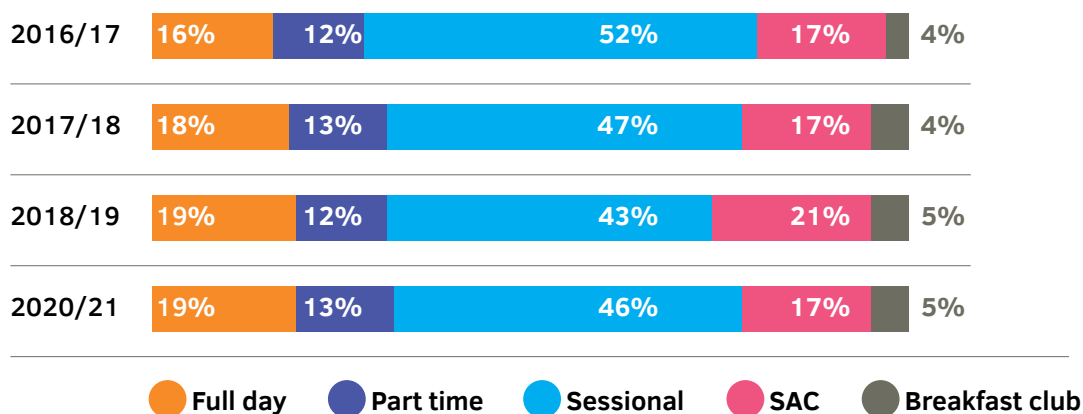


Cork County and Dublin City have the highest number of children enrolled as reported by services at 8,929 and 8,263 respectively. They are followed by Galway (6,809), Tipperary (5,852), Dublin – Fingal (5,793) and South Dublin (5,577). Almost a quarter of all children were enrolled in services in Dublin County (four local authorities) (23% or 23,417). This is reflective of the population distribution nationally.

In 2020/21, services reported 120,011 children enrolled by service type. The largest share of children (46%) availed of a sessional service followed by full day (19%). The changes in the distribution of children across different types of care reflect the changes in the age breakdown. The 3% increase in the proportion of children enrolled in a sessional service corresponds with

the growth in the share of pre-schoolers, while the 4% decrease in the proportion of children availing of SAC matched the drop in the share of school-age children. Figure 5.2 presents the changes in the proportion of children availing of different types of provision over time.

Figure 5.2: Percentage of enrolled children by service type offered between 2016/17 and 2020/21



Further analysis of enrolments by location and service type are included in the accompanying dashboards³².

5.3 Vacant places

At the time of the survey in 2020/21, services reported **22,274** vacant places. Based on the extrapolation, (factoring for non-respondents), it was estimated that the total number of vacant places nationally at the time of the survey was **38,935**. The number of vacant places tripled since 2018/19, when the number of estimated vacant places was 12,444 (a difference of 26,491 places). By comparison, the number of children enrolled decreased by 24,736 in the same period. While some increases in the number of vacant places can be attributed to demographic changes, this indicates that not all children have returned to centre-based care after the disruptions caused by the COVID-19 pandemic rather than significant additional capacity being created.

Of the 2,520 services who responded to the survey, 1,435 services (57%) indicated that they had at least one vacant place within their service. The proportion of services with at least one vacant place more than doubled since 2018/19 when 24% of services reported at least one vacant place.

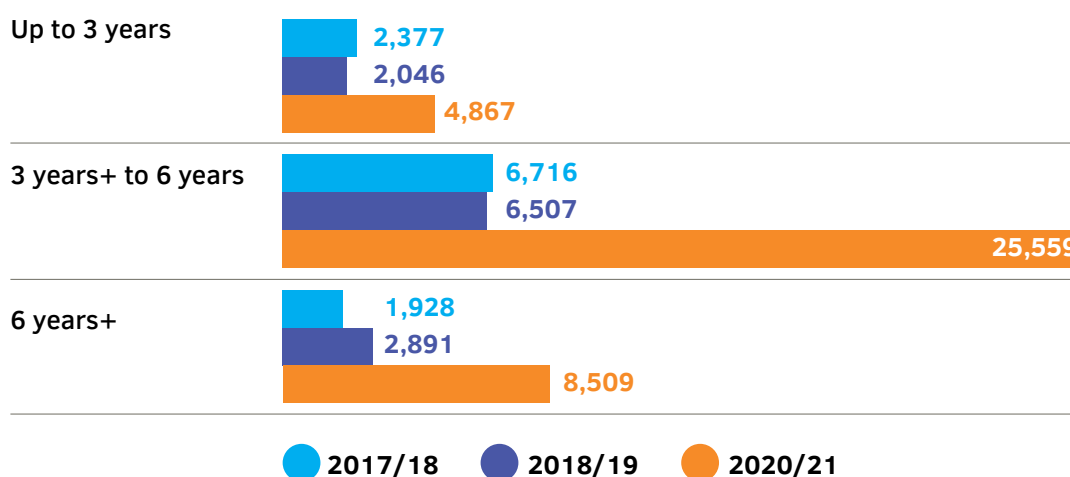
Table 5.6 presents the distribution of vacant places amongst different age groups. As in previous years, the highest proportion of vacant places was reported for the 3+ to 6 years' age group (66%). This is to be expected as children aged 3 years+ to 6 years represent the largest cohort in ELC and SAC services, constituting 70% of all children enrolled. While the increases in the number of vacant places were observed across all age groups, the levels of growth varied. The largest increase was observed in vacant places for children aged 3+ to 6 years at 240%, while the lowest was for children aged up to 3 years at 138%. Figure 5.3 shows the change in the extrapolated number of vacant places for each age range over the last three years.

32 To access the dashboard please go to: <https://www.pobal.ie/research-analysis/early-years/>.

Table 5.6: Number and percentage of vacant places by age (reported and extrapolated figures)

	Vacant places	% of all vacancies	Extrapolated number of vacancies nationally
Up to 3 years (0–36 months)	2,784	12%	4,867
3 years+ to 6 years (37–72 months)	14,622	66%	25,559
6 years+	4,868	22%	8,509
Total	22,274	100%	38,935

Figure 5.3: Change in number of vacant places (extrapolated) by age range between 2017/18 and 2020/21



The vacancy rate is calculated by dividing the number of vacant places by the number of children enrolled. With **103,870 children enrolled** and **22,274 vacant places** reported by services nationally, the **vacancy rate in 2020/21 was 21%**. This is a significant increase on the 2018/19 vacancy rate of 6%. Table 5.7 presents the vacancy rates by age in 2020/21 alongside the reported numbers of children enrolled and vacant places. The lowest vacancy rate was recorded for children aged 1+ to 2 years at 10%. The highest vacancy rate was recorded for schoolgoing children aged 5+ to 6 years at 48%.

The vacancy rate for all age groups has risen significantly compared to two years ago. The increase is most notable in older age groups. The vacancy rate increased from 9% in 2018/19 to 41%³³ in 2020/21 for the 5+ to 6 years age cohort and from 9% to 37% for the 6+ to 8 years' age group. In the 8 years+ age group, the vacancy rate increased from 8% in 2018/19 to 34% in 2020/21. Figure 5.4 shows the change in the vacancy rates over the last five years.

33 Calculated together for both schoolgoing and non-schoolgoing children.

Table 5.7: Number of vacant places as a percentage of numbers enrolled (by age range)

	Enrolled	Vacant places	Vacancy rate
Up to 1 year (0–12 months)	1,241	251	20%
1 year+ to 2 years (13–24 months)	5,506	575	10%
2 years+ to 3 years (25–36 months)	11,246	1,958	17%
3 years+ to 4 years (37–48 months)	29,632	4,899	17%
4 years+ to 5 years (49–60 months) Non-school going	26,922	3,297	12%
4 years+ to 5 years (49–60 months) Schoolgoing	5,848	2,432	42%
5 years+ to 6 years (61–72 months) Non-schoolgoing	3,484	1,036	30%
5 years+ to 6 years (61–72 months) Schoolgoing	6,184	2,958	48%
6 years+ to 8 years (73–96 months)	6,997	2,566	37%
8 years+	6,810	2,302	34%
Total	103,870	22,274	21%

Figure 5.4: Change in vacancy rates by age 2016/17 - 2020/21

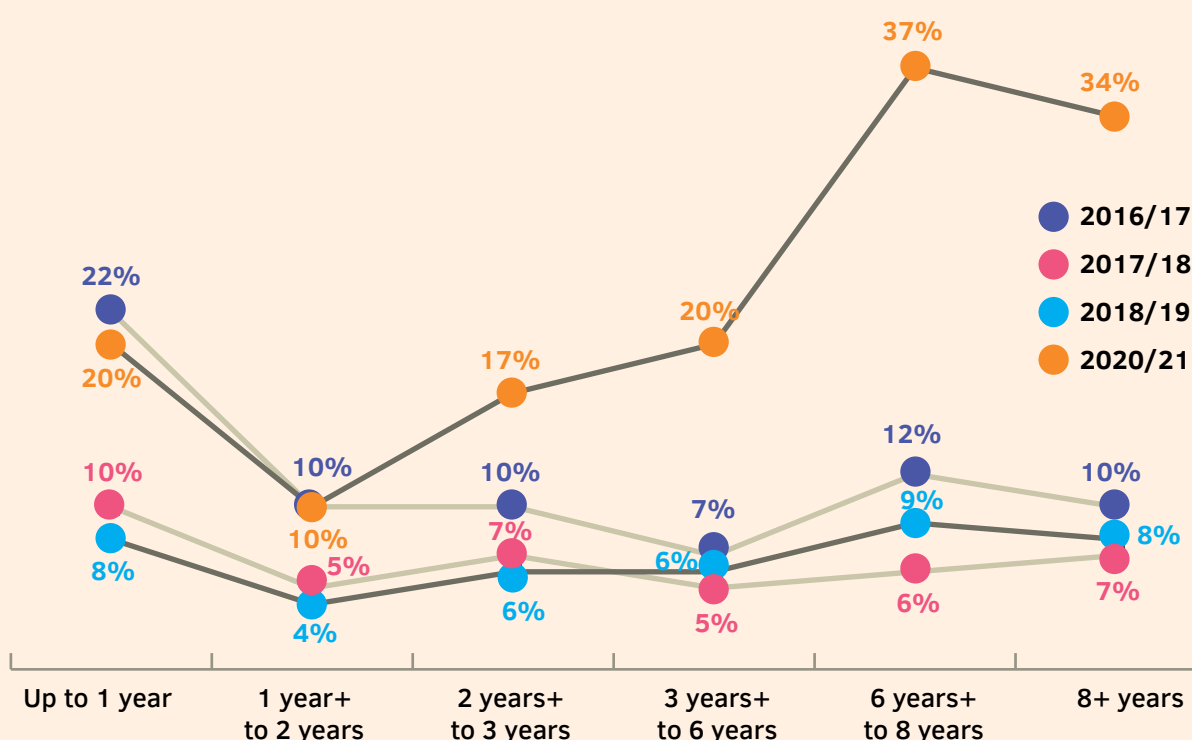


Table 5.8 presents the vacancy rates at county level. While national vacancy rates increased significantly (by 15%), the gap in provision between different areas of the country also widened. The highest vacancy rates were recorded for Leitrim (31%), Clare (30%) and Cork City (29%). The lowest vacancy rate was 11% and was recorded in Dún Laoghaire-Rathdown. In 2020/21, nine counties had a vacancy rate of 25% or higher indicating that the availability of places has increased across the country. However, given the significant drop in the numbers

of children enrolled in programme year 2020/21, it is unlikely these vacancy rates will be sustained into the future once the effects of the COVID-19 pandemic on the enrolments and vacancy rates lessen.

Table 5.8: County breakdown of number of vacant places as a percentage of children enrolled

County	Vacant places	Children enrolled	% vacant places
Dublin – Dún Laoghaire-Rathdown	403	3,784	11%
Carlow	194	1,636	12%
Sligo	264	1,969	13%
Monaghan	355	2,282	16%
Longford	202	1,245	16%
Wicklow	410	2,518	16%
Cavan	358	2,083	17%
Dublin – South Dublin	983	5,577	18%
Kildare	722	4,088	18%
Meath	627	3,549	18%
Offaly	313	1,636	19%
Tipperary	1,150	5,852	20%
Dublin – Dublin City	1,662	8,263	20%
Dublin – Fingal	1,176	5,793	20%
Westmeath	422	2,051	21%
Waterford	623	2,841	22%
Roscommon	433	1,921	23%
Wexford	888	3,875	23%
Kilkenny	612	2,567	24%
Louth	796	3,301	24%
Cork County	2,187	8,929	24%
Donegal	921	3,744	25%
Limerick	976	3,904	25%
Mayo	739	2,871	26%
Kerry	1,027	3,933	26%
Galway	1,826	6,809	27%
Laois	549	1,931	28%
Cork City	487	1,694	29%
Clare	718	2,413	30%
Leitrim	251	811	31%
Total	22,274	103,870	21%

The breakdown of vacant places by service type offered is presented in Table 5.9. The highest share of vacant places was available for sessional (36%) followed by SAC (23%). When compared to 2018/19, the proportion of sessional vacant places has decreased from 44% to 36% in 2020/21. The share of vacant places for breakfast club, SAC and part-time increased by 4%, 2% and 2% respectively during the same period.

Table 5.9: Number of vacant places by service type offered

Service type	Number of vacant places	% of all vacancies
Full day	2,795	11%
Part-time	3,583	14%
Sessional	9,149	36%
SAC in term only	5,882	23%
Breakfast club	3,844	15%
Drop-in	105	>1%
Total number of vacant places	25,358	100%

5.4 Waiting lists

Services were asked to provide the number of children on a waiting list by age and service type. While the number of children on waiting lists is an indication of demand, it must be noted that parents often place their child/children on multiple lists. Therefore, this figure cannot be used to indicate overall demand but is useful in assessing demand for services for a particular age group or type of service.

In 2020/21, services reported **22,304 children on waiting lists** by age. When extrapolated, this figure could be as high as **38,987** nationally. Compared to 2018/19, the overall number of children on waiting lists increased by 68%. This seems to contradict the trend of a significant increase in vacant places when it would be expected that growth in vacant places should lead to a decrease in the number of children on waiting lists. A more in-depth analysis has shown that these waiting lists were reported by 971 services (39% of all services). Of these, 440 or 45% reported having at least one vacant place. Further analysis at a service level has shown that for the vast majority of services, vacant places did not match the age groups of children waiting on a place, therefore suggesting a mismatch of supply and demand.

Table 5.10 compares the numbers of children on waiting lists with the numbers enrolled by age group. While nationally, for every five children enrolled, approximately one is on a waiting list, these proportions are much higher for children younger than three years. The demand for baby places is the highest – for every two babies enrolled in services, approximately three are placed on a waiting list (154%). By comparison, this figure was 84% in 2018/19.

Table 5.10: Children enrolled and on waiting list by age

	Total enrolled	Waiting list	No. on waitlist as % of children enrolled
Up to 1 year	1,241	1,960	154%
1 year+ to 2 years	5,506	3,580	63%
2 years+ to 3 years	11,246	4,454	38%
3 years+ to 4 years	29,632	5,450	18%
4 years+ to 5 years	26,922	2,819	10%
4 years+ to 5 years	5,848	992	16%
5 years+ to 6 years	3,484	352	9%
5 years+ to 6 years	6,184	1,133	17%
6 years+ to 8 years	6,997	803	11%
8 years+	6,810	761	11%
Total	103,870	22,304	21%

The total number of children on waiting lists by service type was 21,924 (see Figure 5.5 for a detailed breakdown). Just over one third of children (34%) were waiting for a full day place, the same proportion as in 2018/19. This was followed by children waiting for sessional a.m. (24%), part-time (23%) and SAC (12%) places. Compared to the 2018/19, the demand for part-time increased by 4% and demand for SAC has decreased by 5%.

Figure 5.5: Number of children on waiting lists by session type

Full day	7,471	34%
Part-time	5,140	23%
Sessional a.m.	5,339	24%
Sessional p.m.	1,076	5%
SAC in term only	2,539	12%
Breakfast club	343	2%
Drop-in	16	<1%

Table 5.11 compares the number of vacant places with the number of children on a waiting list by service type. The demand for full day remained the same as in 2018/19 at 34%. In 2020/21, almost three times more children were waiting for a full day place (7,471) than there were vacant places (2,795). The demand is also significantly higher than supply for part-time places with 5,140 children on waiting lists compared to 3,583 vacant places. The higher number of vacant places compared to the number of children on waiting lists for sessional places and SAC indicates a mismatch in the local supply and demand rather than an actual demand for these type of places.

Table 5.11: Number and percentage of vacant places and children on waiting list by service type

Service type	Vacant places	Waiting lists	Vacant places %	Waiting lists %
Full day	2,795	7,471	11%	34%
Part-time	3,583	5,140	14%	23%
Sessional	9,149	6,415	36%	29%
SAC in term only	5,882	2,539	23%	12%
Breakfast club	3,844	343	15%	2%
Drop-in	105	16	<1%	<1%
Total	25,358	21,924	100%	100%

5.5 Capacity

Analysis of capacity is vital for informing the planning and management of provision in the ELC and SAC sector. This section analyses the capacity of the sector using figures reported by the services on the number of children enrolled and vacant places (capacity is the sum of children enrolled and vacant ELC and SAC places). The overall **reported capacity** of the sector in 2020/21 was **126,144** and the **estimated overall capacity nationally** was **220,500**. This represents an increase of 1% or 1,755 since data was last collected in 2018/19.

Table 5.12 compares the extrapolated capacity by age in 2018/19 and 2020/21. The majority of places were for children aged 3 years+ 6 years (69% or 151,538). The proportion of this age group in the overall capacity increased by 5% on 2018/19, while the share of places for children up to 3 years old decreased by 3% and school-age children by 2%.

Table 5.12: Extrapolated capacity by age range in 2018/19 and 2020/21

Age group	2018/19		2020/21	
	Capacity	%	Capacity	%
Up to 3 years	40,764	19%	36,318	16%
3 years+ to 6 years	139,919	64%	151,538	69%
6 years+	38,062	17%	32,644	15%
Total	218,745	100%	220,500	100%

The capacity differs across the country. Table 5.13 presents the total number of places (both occupied and vacant) by age at county level and their share nationally based on the responses to the survey. The capacity of services at county level is linked to the size of the population residing in a given county. The highest share of ELC and SAC places was in Cork County (9%) and Dublin City (8%), while the lowest, at 1%, was in the smallest counties in Ireland – Leitrim and Longford. This is in line with the distribution of the population nationally.

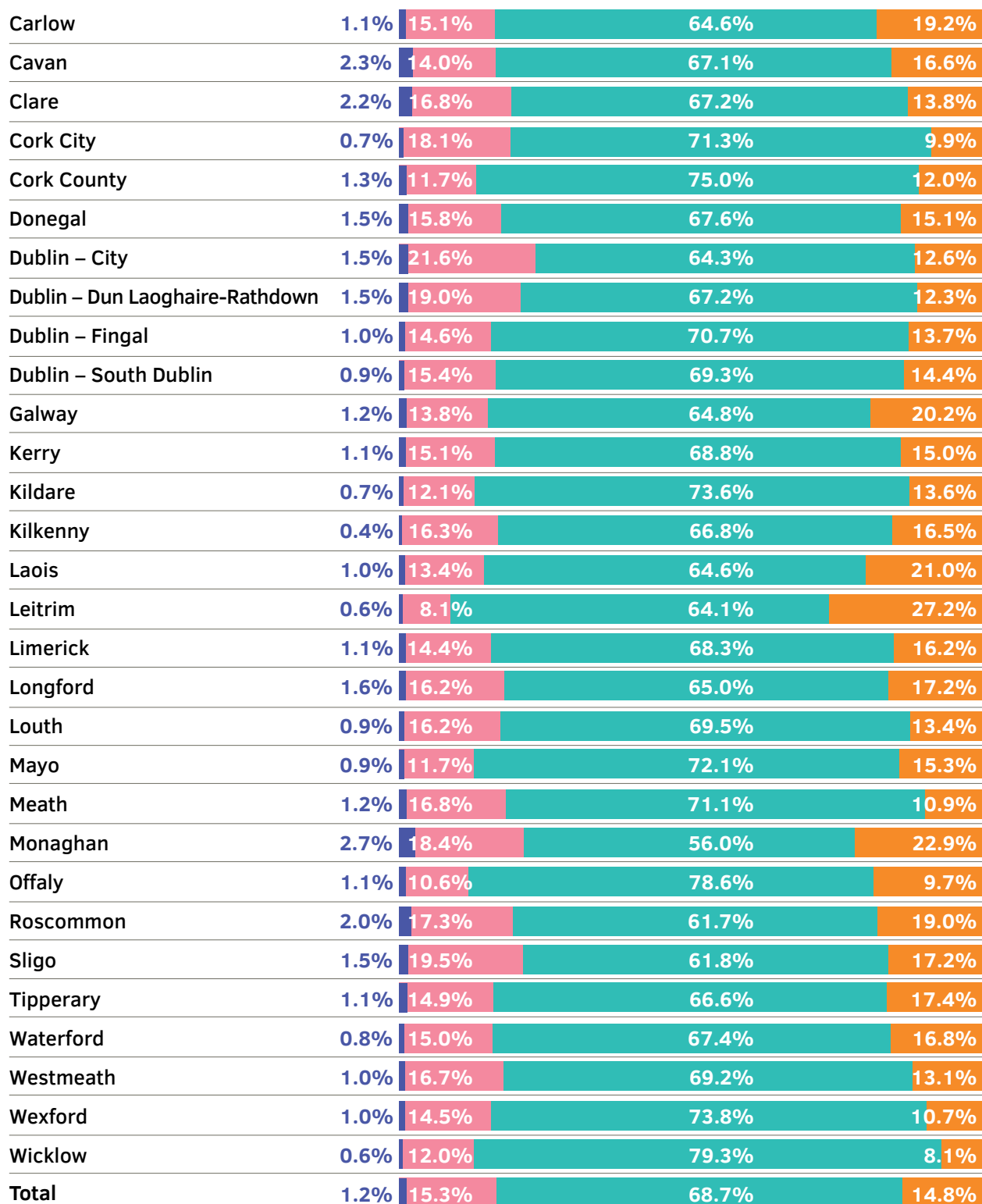
Table 5.13: Capacity by county (reported)

County	Capacity (enrolled and vacant places)	% of overall national capacity (enrolled and vacant places)
Cork County	11,116	8.8%
Dublin – Dublin City	9,925	7.9%
Galway	8,635	6.8%
Tipperary	7,002	5.6%
Dublin – Fingal	6,969	5.5%
Dublin – South Dublin	6,560	5.2%
Kerry	4,960	3.9%
Limerick	4,880	3.9%
Kildare	4,810	3.8%
Wexford	4,763	3.8%
Donegal	4,665	3.7%
Dublin – Dún Laoghaire-Rathdown	4,187	3.3%
Meath	4,176	3.3%
Louth	4,097	3.2%
Mayo	3,610	2.9%
Waterford	3,464	2.7%
Kilkenny	3,179	2.5%
Clare	3,131	2.5%
Wicklow	2,928	2.3%
Monaghan	2,637	2.1%
Laois	2,480	2.0%
Westmeath	2,473	2.0%
Cavan	2,441	1.9%
Roscommon	2,354	1.9%
Sligo	2,233	1.8%
Cork City	2,181	1.7%
Offaly	1,949	1.5%
Carlow	1,830	1.5%
Longford	1,447	1.1%
Leitrim	1,062	0.9%
Total	126,144	100.0%

Figure 5.6 shows the distribution of capacity within services in a given county by stage in childhood. Nationally, the majority of capacity (enrolled and vacant places) in ELC and SAC services is for pre-schoolers (69%), followed by school-age children and toddlers (15% each) and babies (1%). This distribution varies between counties. Overall, the proportion of places for babies and toddlers is higher in more urbanised counties, while the share of places for SAC is higher in rural locations.

The highest proportion of places for pre-schoolers was recorded in Offaly (79%) and Wicklow (79%), while the lowest was in Monaghan (56%). The largest share of places for toddlers was in services in three counties - Dublin City (22%), Sligo (20%) and Dún Laoghaire-Rathdown (19%), while the lowest was in Leitrim (8%). At 27%, Leitrim had the highest proportion of places for children of schoolgoing age, while Wicklow had the lowest at 8%. The share of places for babies was at 1% or lower for all but seven counties across the country, with the highest proportion of baby places found in Monaghan at 3% and the lowest in Kilkenny at 0.4%.

Figure 5.6: Capacity by stage of childhood



● Babies
 ● Toddlers
 ● Pre-schoolers
 ● School-age

Services reported a total capacity of 145,369 places by service type. The highest share was sessional places (a.m. and p.m. combined) at 44%, followed by full day and SAC (in term), both at 18%. The biggest change was observed in capacity for SAC – its proportion decreased from 21% in 2018/19 to 18% in 2020/21. The capacity for other types of provision changed by 1% or less.

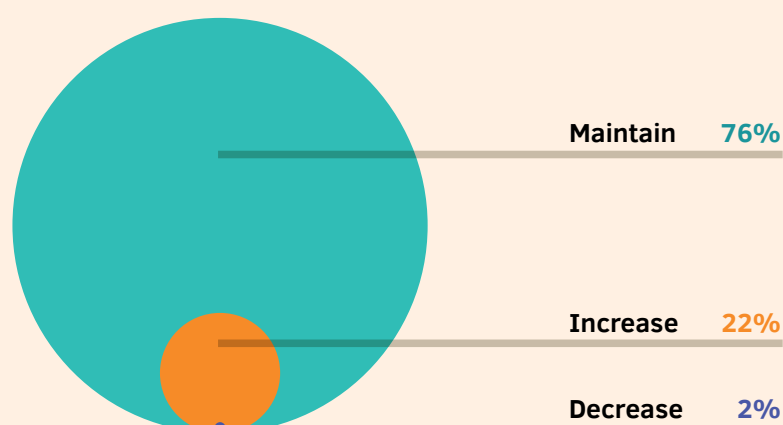
Table 5.14: Capacity (children enrolled + vacant places) by service type

	Children enrolled	Vacant places	Capacity	%
Full day	23,201	2,795	25,996	18%
Part-time	14,908	3,583	18,491	13%
Sessional a.m.	46,793	5,820	52,613	36%
Sessional p.m.	8,860	3,329	12,189	8%
SAC in term only	20,390	5,882	26,272	18%
Breakfast club	5,693	3,844	9,537	7%
Drop-in	166	105	271	<1%
Total	120,011	25,358	145,369	100%

Services were asked about their plans on changing the existing capacity within their services. Figure 5.7 shows the plans of services to change the number of places available. The majority of services (76%) responded to confirm that they plan to maintain their current number of places. 22% of services indicated that they plan to increase the number of places, a decrease of 3% on the last time this data was collected in 2018/19. A very small share of services (2%) was planning to reduce their capacity.

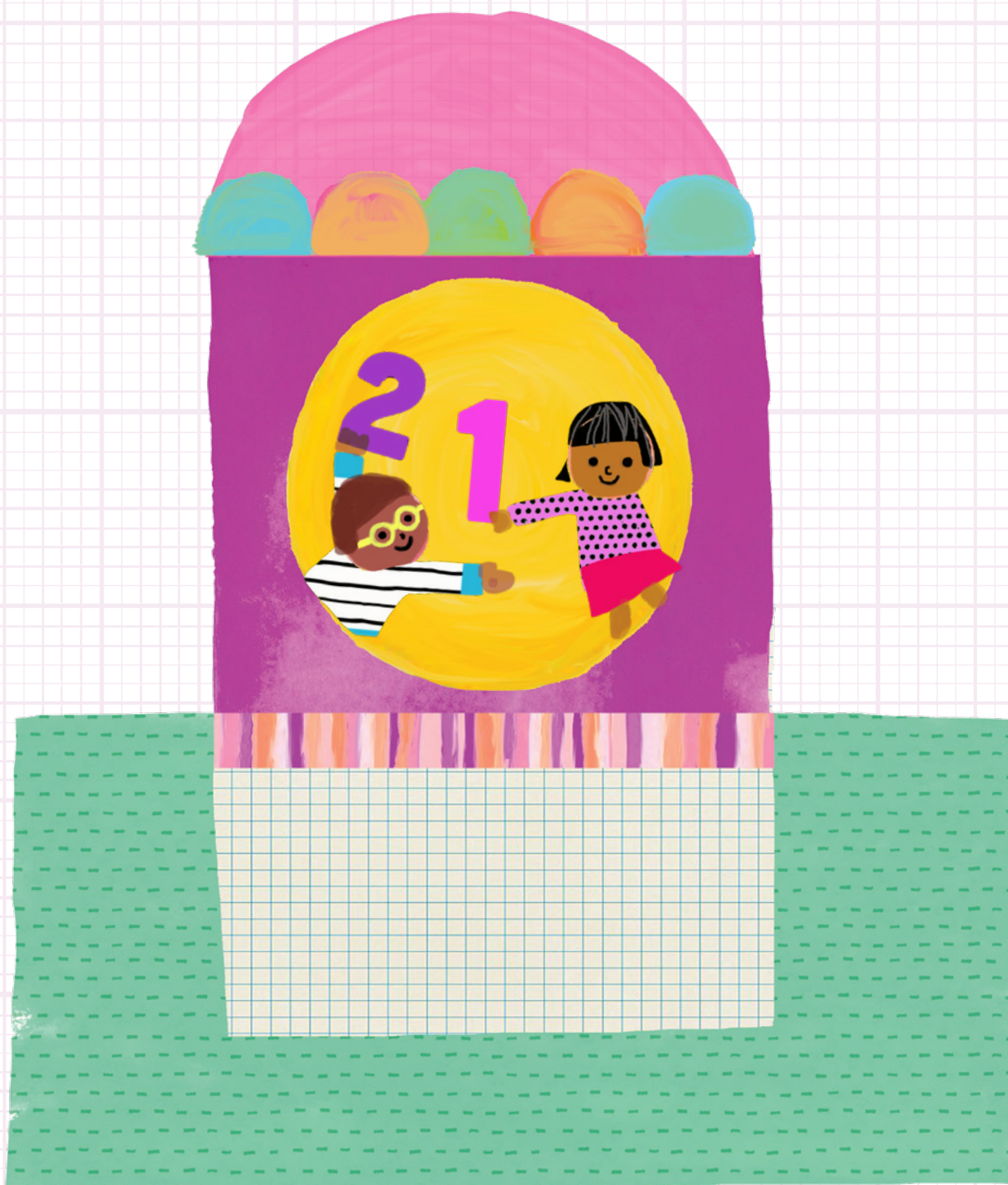
The 588 respondents who indicated a planned increase in the number of places they offer would together provide an additional 8,121 places if these plans were executed. The total number of places the sector would lose if the decreases planned by 48 services were implemented is 716.

Figure 5.7: Services' plans on changing the number of places



6

Fees



KEY STATISTICS

The average **weekly cost of full day childcare** was

€187

almost unchanged since last year

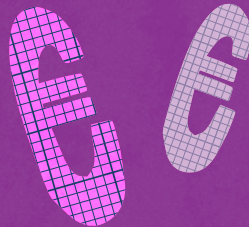
27%

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



Fees

are higher in **urban areas** and in **private services**



The average **hourly fee for SAC in term** remained almost unchanged at

€5.25

The **highest fees** were charged for

babies

up to 1 year old

The average **weekly fee out of term** increased by

11%

to

€168



6.1 Introduction

This chapter provides an analysis of fees for Early Learning Care (ELC) and School-Age Childcare (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, size of service 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 a service 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 State subsidy/capitation (i.e. ECCE) and to include them in the fee amount provided.

This report also presents the analysis of data on SAC fees both in term and out of term. This analysis is presented in Section 6.7.

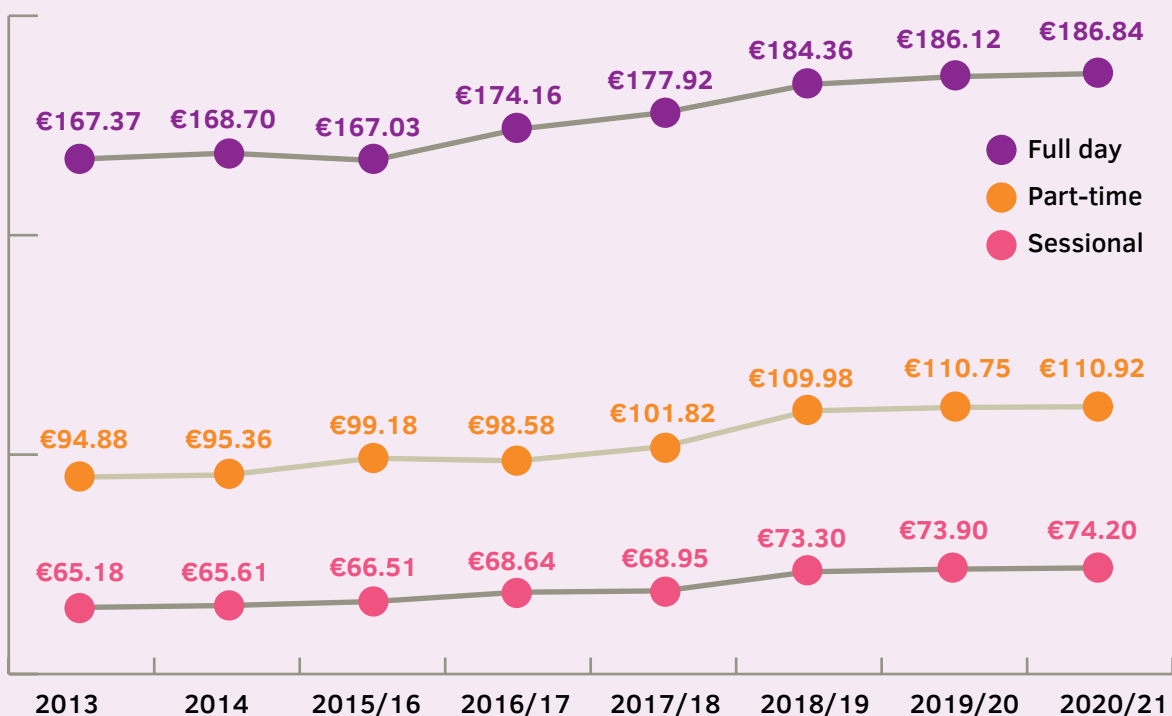
6.2 Overall national fees

In 2020/21, the average weekly fee nationally³⁴ per child for full day was €186.84, for part-time was €110.92 and for sessional was €74.20. The fees for all types of provision remained almost the same, with less than 0.5% change for all types of care compared to 2019/20. The level of change in average fees since last year is shown in Table 6.1, while Figure 6.1 presents the change in fees over the last eight years.

Table 6.1: The level of change in weekly fees between 2019/20 and 2020/21

	2019/20	2020/21	Change from 2019/20	% change from 2019/20
Full day	€186.12	€186.84	€0.72	0.39%
Part-time	€110.75	€110.92	€0.17	0.15%
Sessional	€73.90	€74.20	€0.30	0.41%

Figure 6.1: Average weekly fees since 2013 by type of ELC and SAC provision



The average weekly fees for different types of provision vary depending on the age of the child. The level of fees decrease as the child gets older both for full day and part-time provision. The highest fees charged are for babies up to 1 year (€192.06 for full day and €117.97 for part-time), while provision for children aged between 5+ to 6 years is the lowest

³⁴ 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 – i.e. if the service provided six different fees for full day care (one for each age group), the median of these fees has been used.

at €178.64 for full day and €107.91 for part-time. This follows trends in previous years with the exception of 2019/20 when fees were lowest for children aged between 4+ and 5 years. The average sessional fees follow a slightly different pattern. While sessional fees are also the highest for babies up to 1 year at €81.76, the lowest average sessional fees charged are for children aged 4+ to 5 years at €73.94. A detailed breakdown of fees by age group is presented in Table 6.2.

Table 6.2: Average weekly ELC and SAC fees by age range of children and type of provision

	Full day	Part-time	Sessional
Up to 1 year	€192.06	€117.97	€81.76
1 year+ to 2 years	€190.28	€116.48	€78.71
2 years+ to 3 years	€187.62	€113.19	€75.42
3 years+ to 4 years	€185.52	€110.72	€73.96
4 years+ to 5 years	€184.61	€110.13	€73.94
5 years+ to 6 years	€178.64	€107.91	€74.34

6.3 Fees by location

The level of fees charged by services varies depending on their location. Differences are observed both between counties and also within counties depending on the level of affluence or disadvantage of the community in which the service is located (see Section 6.5 for details). Historically, fees are higher in urban areas and along the East coast.

Table 6.3 presents average weekly 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 2020/21 were €244.08 for full day, €139.10 for part-time and €84.71 for sessional. The difference in average fees charged across counties is significant. The average weekly full day fees in Dún Laoghaire-Rathdown are 60% higher than the average fees recorded for Carlow (€152.08) where fees charged for full day were lower in 2020/21. The part-time fees are 58% higher in Dún Laoghaire-Rathdown than in Monaghan (€87.76). The most expensive sessional fees (Dún Laoghaire-Rathdown) are 29% higher than in Monaghan (€65.52).

A detailed breakdown of fees by age range and type of provision at county level is included in the dashboards below³⁵.

It is worth noting that averages can mask significant variations within counties. For example, the highest weekly full day fee charged by an individual service was in Dún Laoghaire-Rathdown (€324.35). However, the lowest weekly fee charged in the same local authority was €134. The highest weekly part-time fee in Dún Laoghaire-Rathdown was €239.50 and the lowest was €78.50.

³⁵ To access the dashboard please go to: <https://www.pobal.ie/research-analysis/early-years/>.

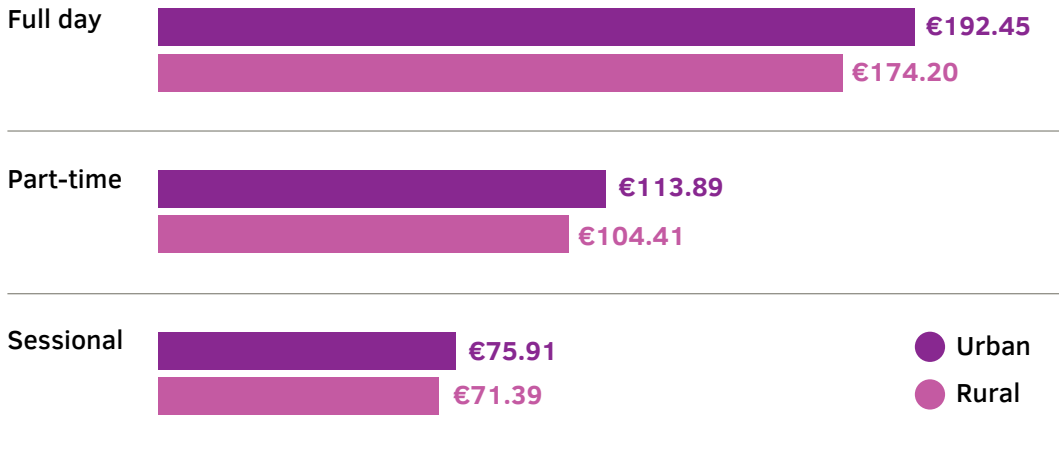
Table 6.3: Average weekly fee by county and type of care provision (full day, part-time and sessional)

County	Full day	Part-time	Sessional
Dublin – Dún Laoghaire-Rathdown	€244.08	€139.10	€84.71
Dublin – Fingal	€214.30	€121.96	€76.81
Dublin – South Dublin	€214.08	€127.90	€78.69
Dublin – Dublin City	€213.85	€127.16	€78.60
Wicklow	€213.36	€126.92	€77.65
Cork City	€204.36	€113.73	€76.58
Cork County	€193.53	€118.22	€77.15
Kildare	€191.68	€120.02	€77.78
Meath	€191.52	€112.35	€73.87
Westmeath	€181.83	€107.48	€79.32
Kerry	€181.01	€103.43	€67.01
Kilkenny	€179.66	€103.86	€71.81
Louth	€178.37	€117.06	€73.30
Wexford	€177.69	€103.99	€73.85
Waterford	€175.61	€101.27	€71.30
Limerick	€175.48	€103.54	€72.52
Laois	€174.89	€100.88	€73.62
Donegal	€174.24	€95.35	€68.25
Galway	€173.56	€105.61	€70.97
Offaly	€173.33	€112.98	€71.81
Clare	€172.00	€102.13	€72.20
Tipperary	€166.71	€99.25	€71.68
Sligo	€165.64	€97.02	€78.20
Leitrim	€163.81	€89.58	€69.85
Roscommon	€161.94	€99.36	€72.13
Cavan	€160.88	€95.39	€69.21
Mayo	€160.68	€95.02	€69.28
Longford	€159.17	€92.92	€71.65
Monaghan	€153.42	€87.76	€65.52
Carlow	€152.08	€88.36	€71.27
Overall average	€186.84	€110.92	€74.20

Fees also differ between services located in urban and rural areas. Figure 6.2 presents the average fees charged by services depending on their urban/rural location. Across all types of provision, average fees are higher in services located in urban areas – 10% higher for full day, 9% higher for part-time provision and 6% higher for sessional.

The changes in fees between 2019/20 and this year differed between urban and rural locations. Full day and part-time fees slightly decreased in urban areas by 0.15% and 0.65% respectively, while the fees for these two types of provision increased in rural areas by 1.68% and 1.76% respectively. Sessional fees grew across all locations with the rate of growth slightly higher in rural locations (0.49% increase compared to 0.26% in urban areas).

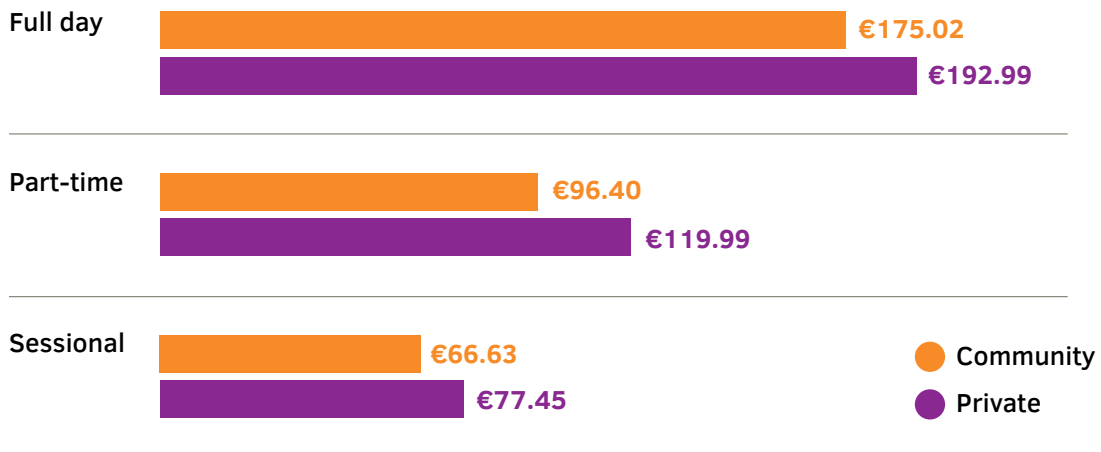
Figure 6.2: Average weekly fees for full day, part-time and sessional provision by urban/rural location



6.4 Fees by provider type

The average fees charged by private services tend to be higher than those charged by community services across all types of provision. Figure 6.3 compares average fees charged by community and private providers. Average weekly fees charged by private providers in 2020/21 were 10% higher for full day, 24% 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 2% for full day and 4% for part-time and has remained the same for sessional fees when compared to 2019/20 figures.

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



The level of fee increases was higher for full day and part-time provision among community providers. However, sessional fees increased more in private services by 0.7% compared to a 0.5% increase in community services (see Table 6.4).

Table 6.4: Percentage change in average fees for full day, part-time and sessional provision by organisation type 2019/20 to 2020/21

Service type	Full day	Part-time	Sessional
Community	1.6%	2.3%	0.5%
Private	0.2%	-0.5%	0.7%

Table 6.5 presents the average fees charged by community and private services by age range. As expected, the fees are higher for all age groups and across all types of provision in private services. The biggest gap in fees charged between private and community services was for sessional provision for children aged up to 1 year where fees charged were 41% higher in private services than community services.

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

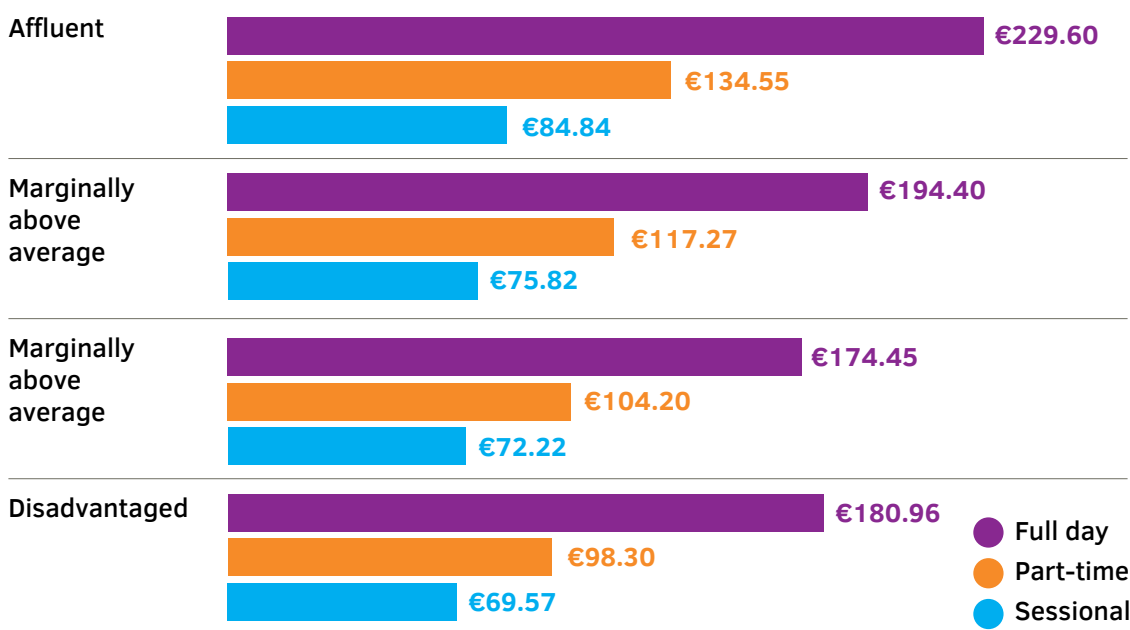
Age range	Full day		Part-time		Sessional	
	Community	Private	Community	Private	Community	Private
Up to 1 year	€180.15	€200.19	€101.12	€132.01	€67.42	€95.38
1 year + to 2 years	€177.17	€197.74	€98.71	€129.31	€68.30	€87.51
2 year + to 3 years	€175.07	€194.49	€96.97	€123.73	€67.28	€79.67
3 year + to 4 years	€173.21	€191.89	€96.06	€119.56	€66.67	€77.01
4 year + to 5 years	€172.88	€190.73	€95.77	€118.92	€66.58	€77.03
5 year + to 6 years	€171.47	€182.35	€95.17	€116.29	€65.20	€79.02

6.5 Fees by level of deprivation

The fees charged by services vary depending on the level of relative affluence/deprivation of the area where the service is located as highlighted in terms of average weekly full day, part-time and sessional fees in Figure 6.4. To determine the level of affluence/disadvantage, the Pobal Haase-Pratschke (HP) Deprivation Index³⁶ was used. For more information on the HP Deprivation Index, see Section 3.2 . The location of each ELC and 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, as in previous years, services located in more affluent areas charged higher fees. The full day fees in affluent areas were 27% higher than those in the locations classified as disadvantaged. The part-time and sessional fees were 37% and 22% higher respectively in affluent areas when compared to disadvantaged areas. Average weekly full day fees were 4% higher in disadvantaged areas than those charged by services located in marginally below average areas. This is largely due to the geographical distribution of areas with a higher level of disadvantage – more likely to be located in urban areas where services charge higher fees overall – 82% of services located in a disadvantaged area were also classified as urban compared to 67% of services located in areas marginally below average.

Figure 6.4: Average weekly fees for full day, part-time and sessional provision by relative affluence/deprivation of the area in which the service is located

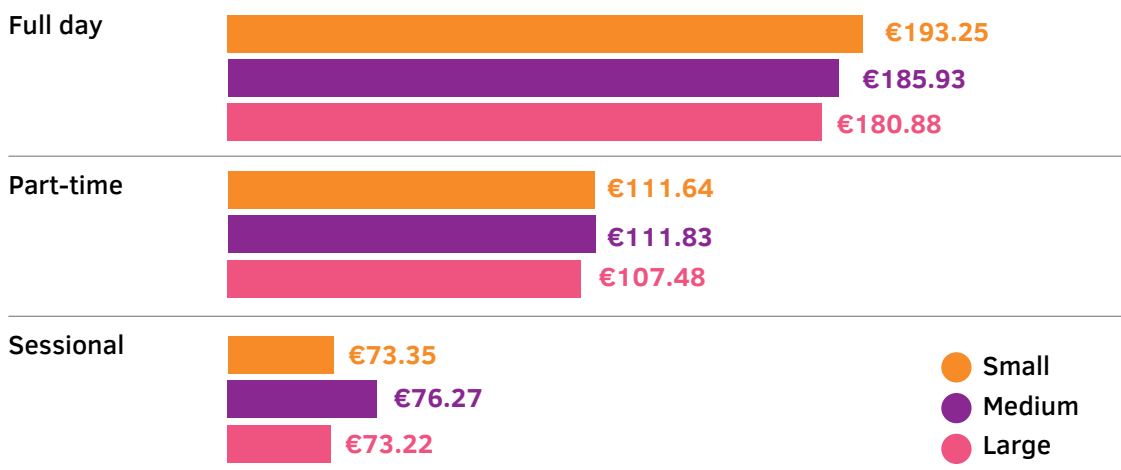


36 <https://www.pobal.ie/app/uploads/2018/06/The-2016-Pobal-HP-Deprivation-Index-Introduction-07.pdf>

6.6 Fees by service size

Service size was calculated by capacity per service by adding the number of children enrolled to vacant places for any given service. A service with a capacity of under 50 places is classified as small (approximately 30% of services are small services), a service with a capacity of 50–99 is classified as a medium service (approximately 45% of services are classified as medium) and a service with a capacity of 100 or more is classified as large (approximately 25% of services are classified as large). Figure 6.5 shows the breakdown of fees by service size. Full day fees are highest in small services, however, the difference between fees charged by small and large services (7%) is less pronounced compared to other variables such as organisation type and location. This would indicate that these other variables influence the fees charged by a service more so than its size.

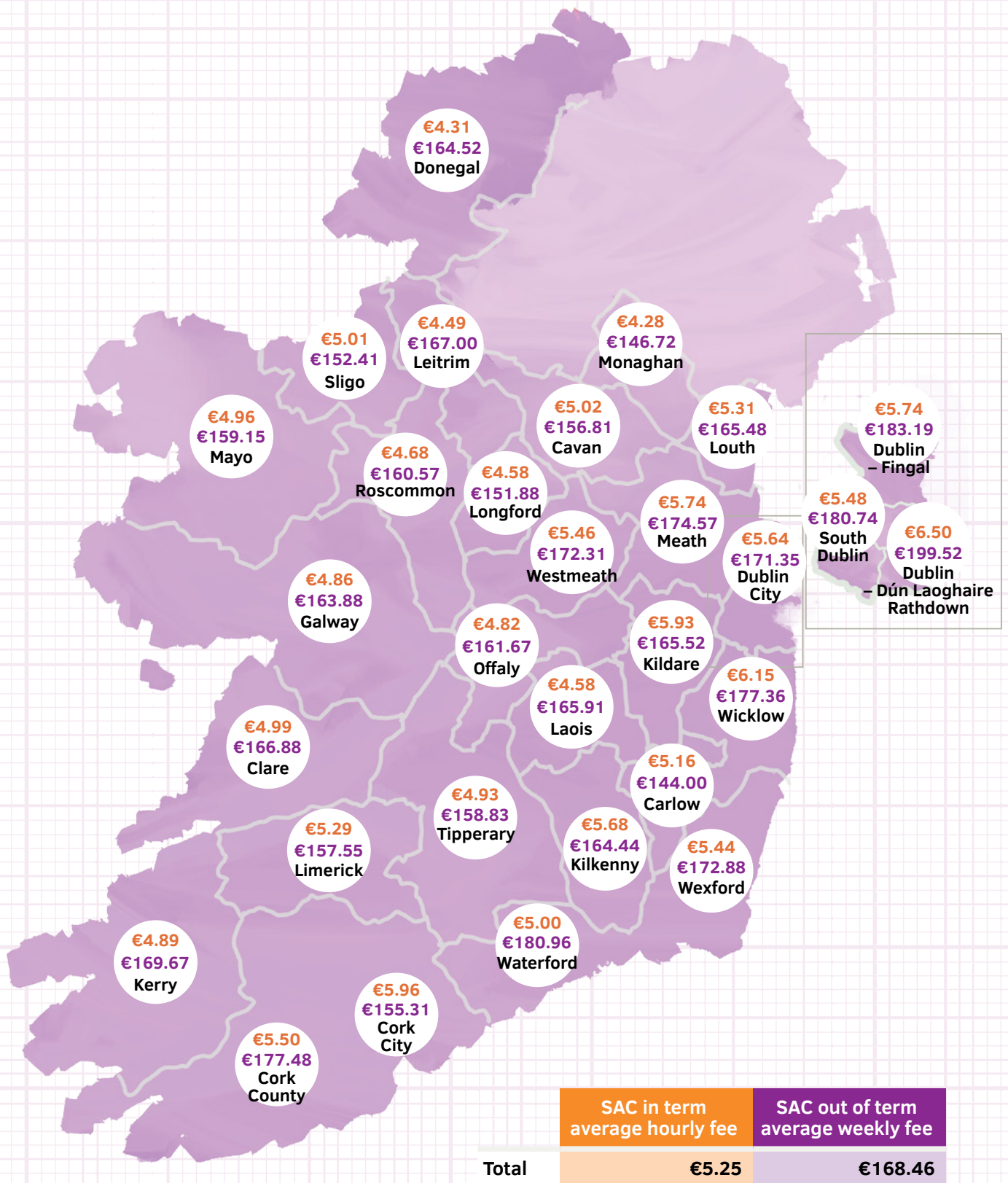
Figure 6.5: Average weekly fees for full day, part-time and sessional provision by service size



6.7 SAC fees

The respondents to the Service Profile survey were asked whether they offer SAC both in term and out of term and if so, they were asked to indicate the fees they charge (hourly for in term and weekly for out of term). Figure 6.6 presents the average SAC fees for in term and out of term care at county level. These are discussed in more detail in subsequent sections.

Figure 6.6: SAC fees by county



6.7.1 SAC fees: in term

The average (mean) hourly fee for SAC in term nationally was €5.25³⁷, while the median was €5 per hour. These averages are very close to the 2019/20 figures (mean €5.24 and median €5). As with ELC fees, SAC fees in term were higher in private services (€5.57 per hour) than in community services (€4.61) and in urban areas (€5.44) than rural areas (€4.95). The highest average hourly fee for in term SAC was in Dublin – Dún Laoghaire-Rathdown at €6.50 per hour, while the lowest average fee was in Monaghan at €4.28 per hour.

The majority of SAC providers (65%) charged €5 per hour or less. 3% of services charged €10 per hour or more, a decrease of 4% on the 2019/20 figures when 7% of services charged €10 per hour or more.

6.7.2 SAC fees: out of term

The average (mean) weekly fee for SAC out of term nationally was €168.46³⁸, an 11% increase on the 2019/20 figure of €151.39. The median in 2020/21 was €165, €15 or 10% higher than in 2019/20.

As with all other types of fees, SAC out of term fees were higher in private services (€170.89) than in community services (€162.13). These fees were also higher in urban areas than in rural areas (€171.41 and €162.88 respectively).

The highest average weekly fees for out of term SAC at county level were in Dublin – Dún Laoghaire-Rathdown (€199.52), while the lowest fees were in Carlow (€144.00).

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

38 Data cleaning involved excluding all fees which were largely distant from the median of the relevant ratios and remodelling values which appeared to be daily values into weekly fees.

7 Staff



KEY STATISTICS

31,600

the estimated number of

staff

working in the ELC and SAC sector

2%

more than last year



57%

of services

retained all their staff

8%

less than last year



Early years assistants

earn

€12.10

per hour



97%
of ELC staff

had a qualifications at NFQ Level 5 or higher



The annual **staff** turnover rate is

19%

55%
of staff

were paid for 50 weeks a year or more

7.1 Introduction

This chapter provides an analysis of the Service Profile survey data on staff who work in Early Learning and Care (ELC) and School-Age Childcare (SAC) services. It includes information on those who work directly with children as well as managers and ancillary staff³⁹. This Service Profile survey data is the most comprehensive dataset currently available on the ELC and SAC workforce in Ireland and includes information on staff working in 2,520 ELC and SAC services.

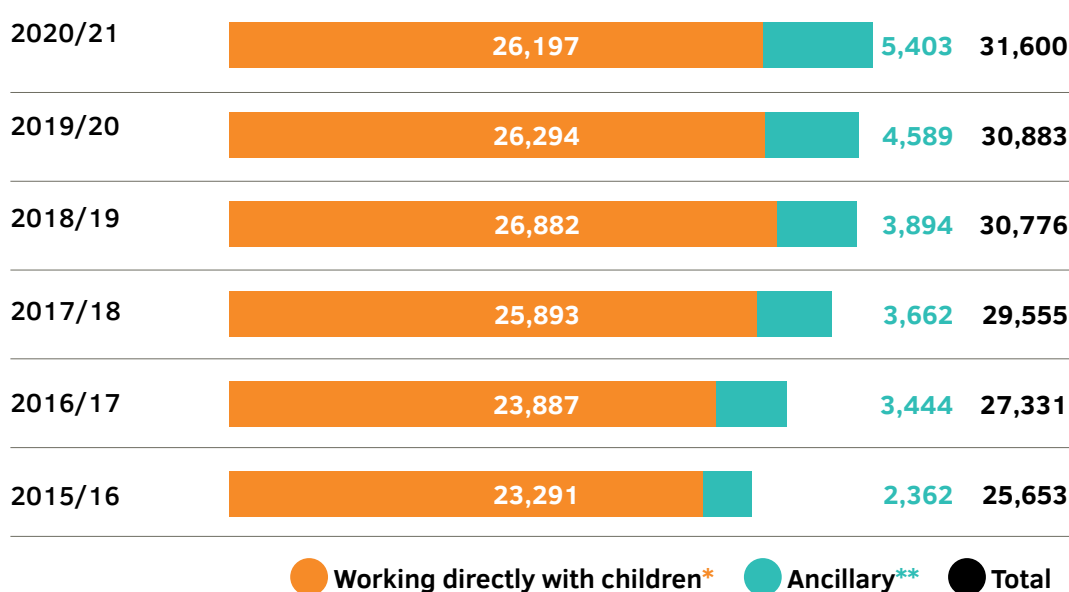
In December 2021, Department of Children, Equality, Disability, Integration and Youth (DCEDIY) published *Nurturing Skills: The Workforce Plan for Early Learning and Care (ELC) and School-Age Childcare (SAC), 2022–2028*. Some of the figures included in this document have been derived using the data collected by the Annual Early Years Service Profile 2020/21 survey. Data on ELC staff reported in *Nurturing Skills* was based only on those staff who work in ELC and excluded those staff who only work in SAC. This approach was made possible by the inclusion of a question for the first time in the 2020–21 Service Profile survey asking whether staff worked exclusively with school-age children or not. As this methodology differs from previous years, figures using both the old and new methodology are presented here.

³⁹ 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.

7.2 Staff numbers

Services reported that 18,078 staff were working in ELC and SAC services in 2020/21. This includes staff working directly with children (14,987 or 83%) and ancillary staff (3,091 or 17%) who work in areas such as management, administration, catering and maintenance. When these figures are extrapolated, it is estimated that a total of 31,600 staff were working in the sector across Ireland at the time of the survey, an increase of 2% on 2019/20. The estimated number of staff working with children has slightly decreased on the previous year by 97 staff or 0.4%. Figure 7.1 shows the number of staff (extrapolated) over the last six years detailing both staff working directly with children and those in ancillary roles.

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



*Includes managerial staff working directly with children. Excludes relief staff.⁴⁰

**Includes managerial staff (not working directly with children).

Table 7.1 provides a breakdown of the numbers of staff working in community/private services. The majority of staff (58%) work in private services. However, these figures are not proportional to the breakdown of services (who responded to the survey) as 68% are private (see 1.3.1.3) which indicates that community services tend to be larger.

This year, the average number of staff per service was 7.2, an increase on the corresponding figure for 2019/20 which stood at 6.8. The likely driver of this increase was public health guidance in services in relation to COVID-19 and the operation of play pods. Community services are, on average, larger than private services with community services employing, on average, 9.4 staff compared to an average of 6.1 staff in private services. Across all services, an average of 5.9 staff members work directly with children, with one staff position encompassing the various ancillary roles on average.

40 Staff working with children in a relief capacity are excluded as some of them may work in multiple services and may have, therefore, been reported more than once in the survey (by different services).

Table 7.1: Number of services and staff⁴¹ (including average number of staff per service and percentage of staff) by type of organisation

Services	Total number of services	Staff working directly with children*			Ancillary staff**			All staff		
		Number of staff	Average per service	% of staff	Number of staff	Average per service	% of staff	Number of staff	Average per service	% of staff overall
Community	805	6,006	7.5	79%	1,584	2.0	21%	7,590	9.4	42%
Private	1,715	8,981	5.2	86%	1,507	0.9	14%	10,488	6.1	58%
All	2,520	14,987	5.9	83%	3,091	1.2	17%	18,078	7.2	100%

*Includes managerial staff working directly with children. Excludes relief staff.

**Includes managerial staff (not working directly with children).

Table 7.2 provides a breakdown of the numbers of staff working in urban and rural locations. The majority of staff (69%) work in services located in urban areas compared to those working in services located in rural areas (31%).

However, again, these figures are not proportional to the breakdown of services (who responded to the survey) as 63% are located in urban areas (see Section 1.3.1.3) and 37% are located in rural areas. This indicates that services in urban areas tend to be larger. Services in urban areas have an average of 7.8 staff members, while in rural areas, the corresponding figure is 6.0.

Table 7.2: Number of services and staff⁴² (including average number of staff per service and percentage of staff) by urban/rural location

Services	Total number of services	Staff working directly with children*			Ancillary staff**			All staff		
		Number of staff	Average per service	% of staff	Number of staff	Average per service	% of staff	Number of staff	Average per service	% of staff overall
Urban	1,594	10,256	6.4	82%	2,222	1.4	18%	12,478	7.8	69%
Rural	926	4,731	5.1	84%	869	0.9	16%	5,600	6.0	31%
All	2,520	14,987	5.9	83%	3,091	1.2	17%	18,078	7.2	100%

*Includes managerial staff working directly with children. Excludes relief staff.

**Includes managerial staff (not working directly with children).

Services were asked to report on all managerial staff collectively (those working directly with children and those who were not). They reported that 3,574 staff worked as managers which represents 20% 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. In addition, the analysis of all managers as a cohort are included in Section 7.3.

41 Excluding relief staff.

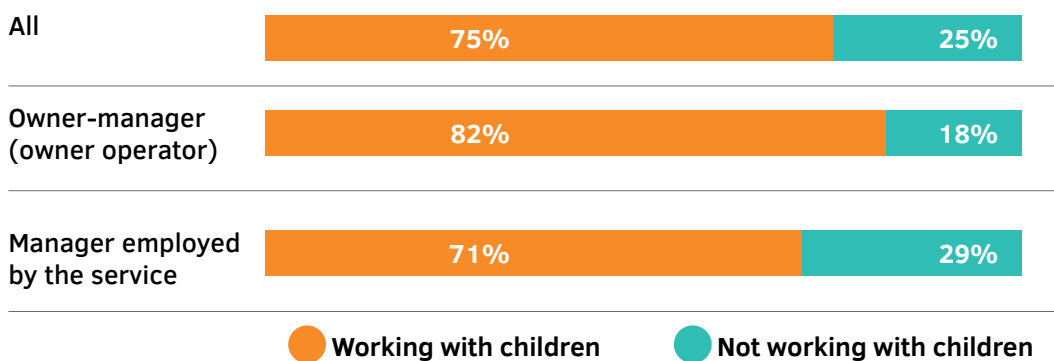
42 Excluding relief staff.

7.3 Managerial staff – key characteristics

The majority of managers (60% or 2,132) are managers employed by the service, with 40% (or 1,442) being owner-managers (owner operators).

Of the 3,574 managers, three quarters (75% or 2,685) worked directly with children and the remaining 889 (or 25%) did not work directly with children (Figure 7.2). A higher proportion of owner-managers reported working directly with children (82%) compared to managers employed by the service (71%).

Figure 7.2: Proportion of managerial staff by manager type and whether they work directly with children



The majority of managers work in private services (69%) compared to those working in community services (31%). By contrast, 58% of all staff work in private services and 42% work in community services. Managers are almost twice as likely to work in urban services (66%) than in rural services (34%). This breakdown corresponds with the overall breakdown of staff by location.

Over half of managers (52%) were working in their current service for over 10 years, while 72% were working in the ELC and SAC sector for over 10 years. By comparison, the proportion of all staff working with children (including managers) for over 10 years in their current service was 22% and 34% in the ELC and SAC sector. Managers were more than twice as likely to be working in the sector for 10 years or more than other staff working directly with children.

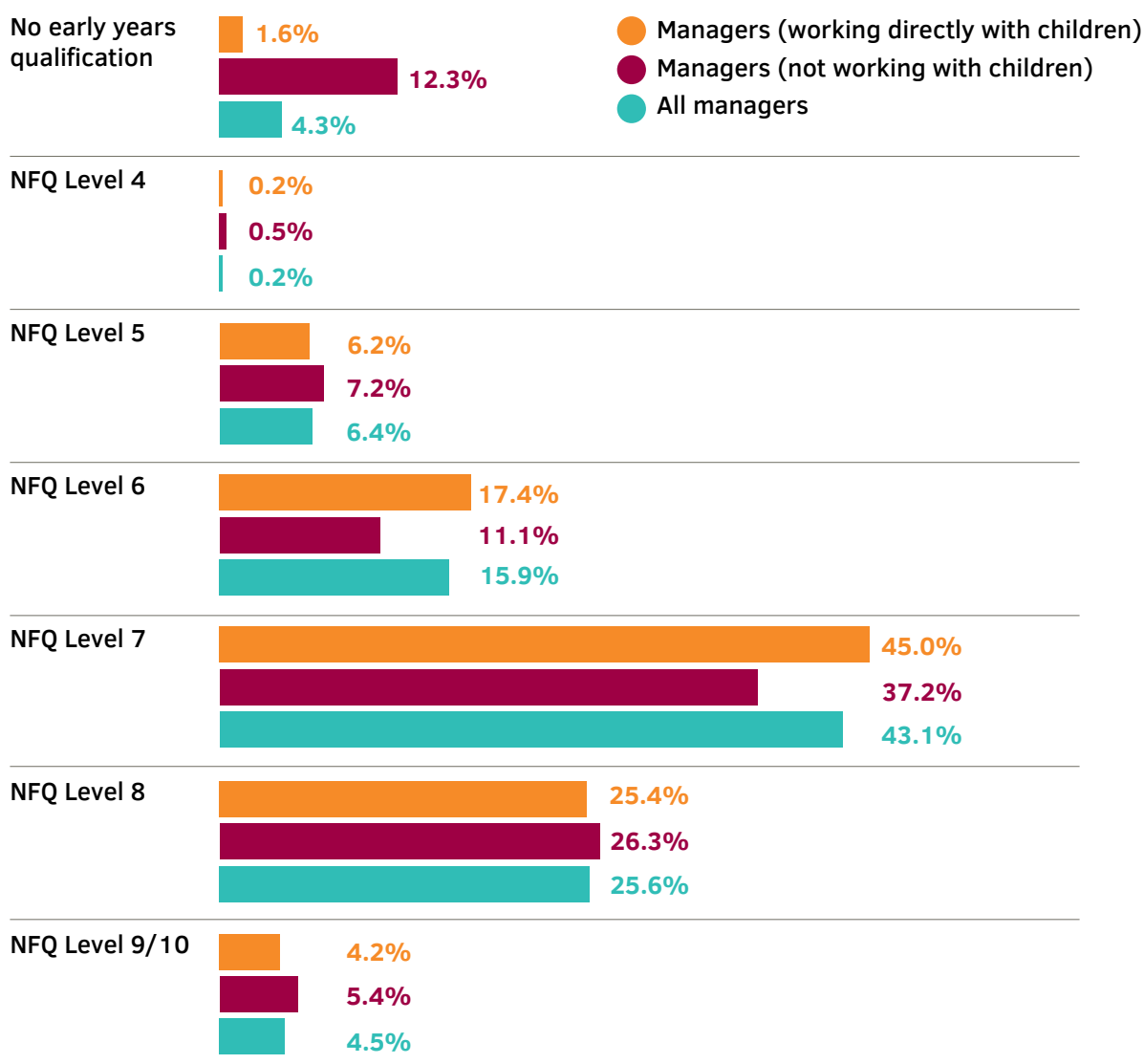
Over half of managers (52%) were paid for 50–52 weeks per year followed by 32% of managerial staff who were paid for 38–42 weeks per year (see Table 7.3).

Table 7.3: Number and percentage of managerial staff by weeks paid per year

Weeks paid per year	No. of managerial staff	% of managerial staff
Under 38 weeks	270	8%
38–42 weeks	1,130	32%
43–49 weeks	281	8%
50–52 weeks	1,893	52%
Total	3,574	100%

The vast majority (95%) of all managerial staff have an ELC qualification at the National Framework of Qualifications (NFQ)⁴³ Level 5 or higher (see Figure 7.3). This figure includes staff working only in SAC for which there is no qualification requirement. When SAC only staff are excluded, the figure rises to 97%. This is the second year that services were also asked to include ELC qualification details for managerial staff not working with children. A higher proportion of managers working directly with children have an ELC qualification at NFQ Level 5 or higher (98%) compared to managers not working with children (87%).

Figure 7.3: 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 qualification. A total of 353 managers were doing so (10% of all managerial staff). The majority of managerial staff (96%) studying for ELC qualifications planned to obtain an award at NFQ Level 6 or higher.

43 The Irish National Framework of Qualifications (NFQ) is a 10-level system used to describe qualifications in the Irish education and training system.

Services were asked to report if managers held any relevant qualifications outside of ELC. 24% of managers working directly with children and 43% of managers not working directly with children were reported as having qualifications in other fields, with 24% of non ELC qualifications in the area of business.

7.4 Relief staff – key characteristics

For the fourth year in a row, services were asked to report on relief staff working directly with children. In 2020/21, they reported 445 staff working in a relief capacity which represents 2.9% of those working directly with children. For the purpose of this report, relief staff working directly with children were excluded from the analysis of the majority of characteristics as some of these staff may work in multiple services and therefore, may have been reported more than once in the survey (by different services).

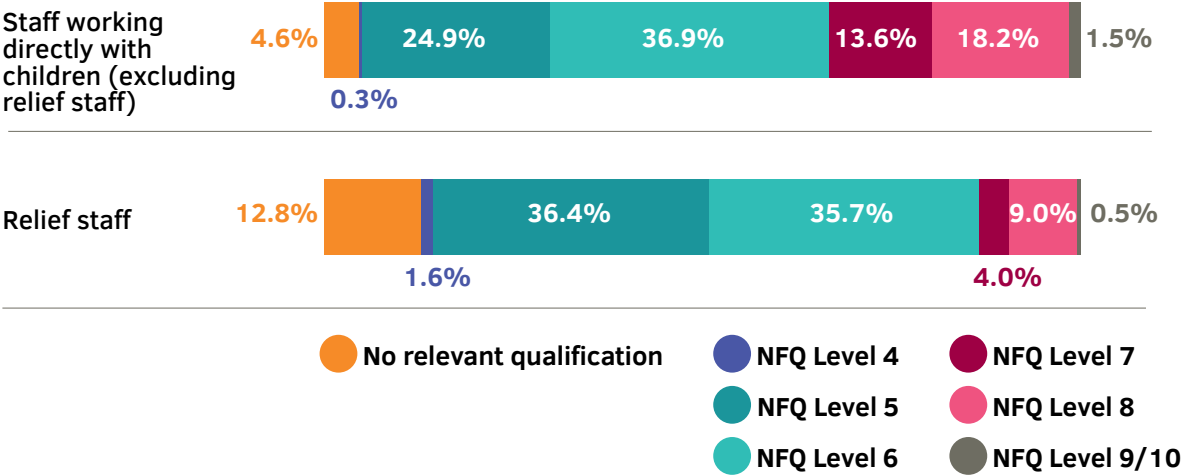
Where relief staff are included in the analysis (i.e. in the wages' section) is clearly indicated. A brief overview of relief staff with key profile statistics is outlined below.

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 private services (65%) and urban areas (71%) compared to other staff working directly with children, where 60% work in private services and 68% do so in urban areas.

Relief staff tend to have less experience in the sector, with 17% having over ten years experience, while the corresponding figure for all other staff is 34%.

The vast majority of relief staff (86%) have an NFQ qualification at Level 5 or higher, although this proportion is lower than that of staff working directly with children (95%) (see Figure 7.4).

Figure 7.4: Comparison of highest level of ELC qualification for staff working directly with children and relief staff



Relative to other staff working directly with children, relief staff are almost twice as likely to be assigned to work with children aged five years and over. They are also less likely to work with babies (see Table 7.4).

Table 7.4: 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 staff	2%	37%	39%	22%
All other staff	4%	24%	62%	10%

7.5 Staff on employment schemes/ Government funded programmes

Table 7.5 presents the breakdown of employees on employment schemes or other Government funded programme, which is similar to 2019/20 breakdown, with the Community Employment (CE) programme accounting for the largest proportion (5% of all staff). One in seven staff in community services are working as part of an employment scheme/Government funded programme.

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 Services Programme (CSP), the Job Initiative Scheme (JI), JobsPlus, Tús and the Youth Employment Support Scheme (YESS). The higher number of staff on schemes/programmes in community services is linked to the fact that community services can access a wider range of employment schemes/programmes.

Similar to 2019/20, the vast majority of staff were direct employees (93%). This proportion is lower in community services where directly employed staff accounted for 85% of all employees. By comparison, almost all staff in private services (99%) were directly employed.

Table 7.5: Total staff on schemes and Government funded programmes working in ELC and SAC services

	Total staff	% of scheme staff	% of all staff
CE – Community Employment	881	73.6%	4.9%
CSP – Community Services Programme	168	14.0%	0.9%
JI – Job Initiative Scheme	27	2.3%	0.1%
JobsPlus	47	3.9%	0.3%
Tús	68	5.7%	0.4%
YESS – Youth Employment Support Scheme	6	0.5%	<0.1%
Total staff	1,197	100%	6.6%

7.6 Contract type

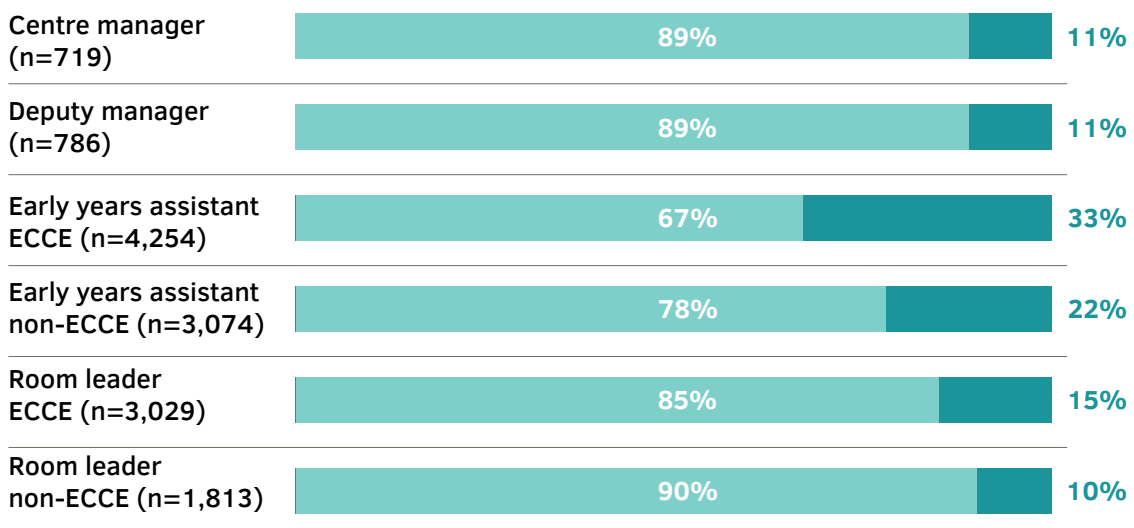
Respondents were asked to state the contract type of staff members who work directly with children (including managers). The majority of such staff have a permanent contract (78%). A slightly higher proportion of those working in private services and those located in urban areas have a permanent contract (81% and 80% respectively), (see Table 7.6).

Table 7.6: Breakdown of staff working directly with children (including managers) contract types by urban/rural location and organisation type

	Permanent	Temporary
Community	75%	25%
Private	81%	19%
Urban	80%	20%
Rural	74%	26%
All	78%	22%

Early years assistants are less likely to have a permanent contract than room leaders, with 67% of early years ECCE assistants having a permanent contract compared to 85% of ECCE room leaders. 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 7.5 for details).

Figure 7.5: Breakdown of staff working directly with children (including managers) contract types by job title⁴⁴

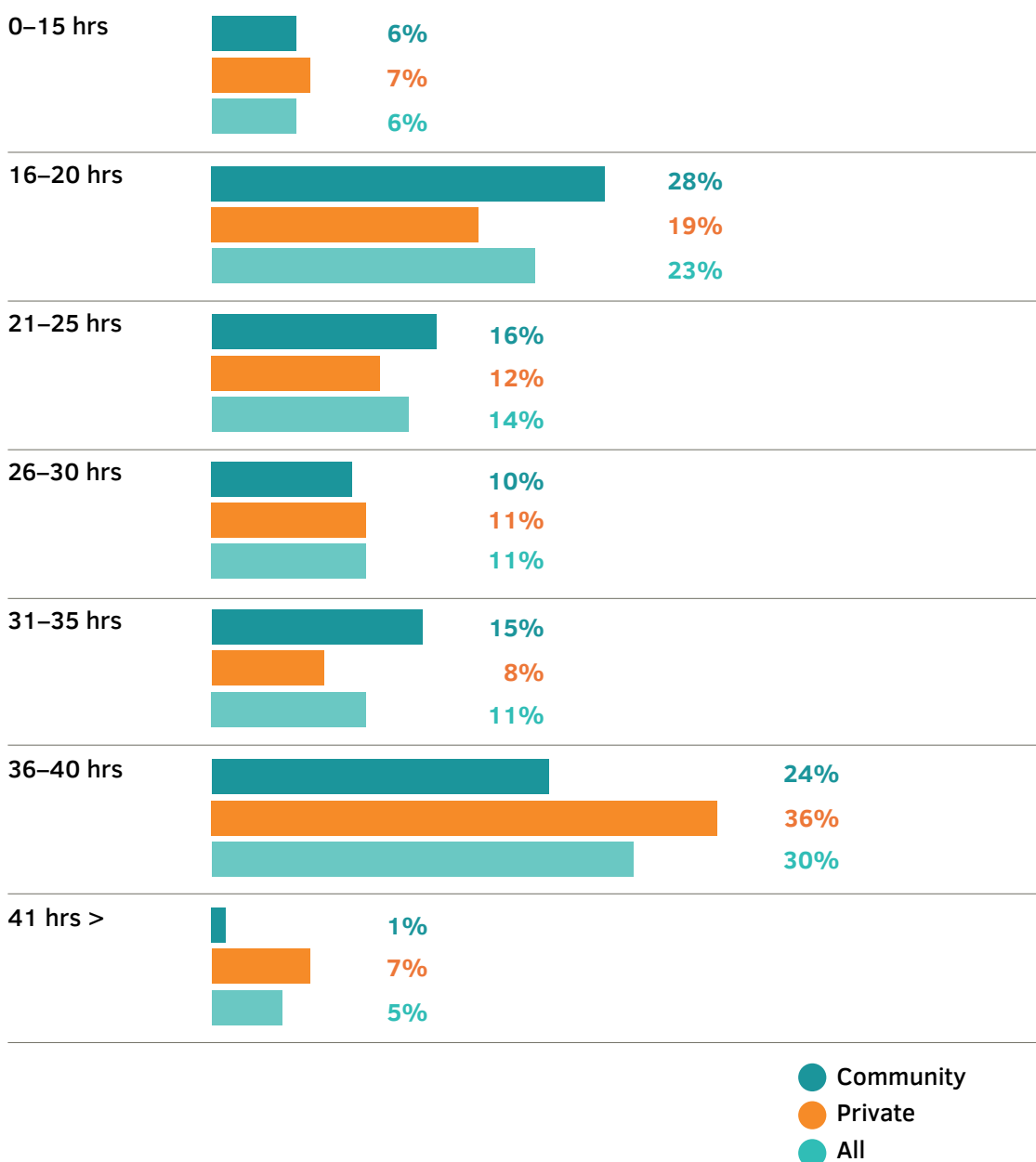


44 Student placements/volunteers (132) were removed during data cleaning as they are unlikely to have a contract of employment.

7.7 Hours worked per week

Respondents were asked to state the average number of hours worked per week for each staff member⁴⁵ working directly with children and managers. The average number of hours worked per week overall was 30 hours. 46% of staff worked over 30 hours per week in 2020/21. Figure 7.6 shows the percentage of staff by organisation type and a range of hours worked. Overall, staff working in private services work longer hours, with 43% working 36 hours or more compared to 25% staff in community services.

Figure 7.6: Percentage of staff working directly with children⁴⁶ by average number of hours worked per week



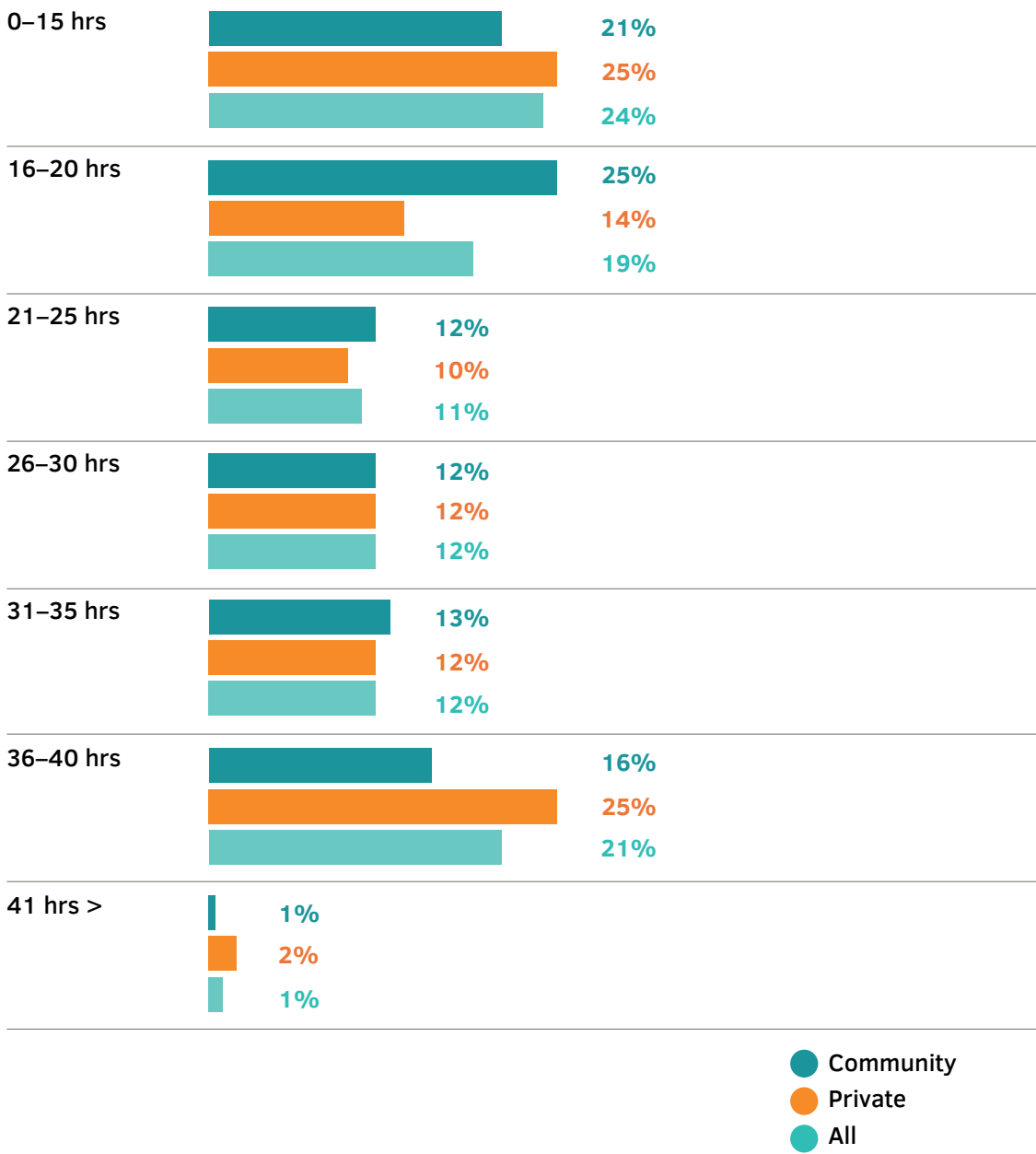
45 The hours worked per week did not equal the sum of contact hours and non-contact hours for 495 staff and were therefore removed from analysis of the hours worked.

46 Excluding relief staff.

7.7.1 Contact hours⁴⁷ worked per week

Respondents were asked to state the average number of contact hours worked by each staff member⁴⁸ working directly with children. The average number of contact hours worked per week overall was 26 hours. A third of staff (34%) worked over 30 contact hours per week in 2020/21. Figure 7.7 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 17% staff in community services.

Figure 7.7: Percentage of staff working directly with children⁴⁹ by average number of contact hours worked per week

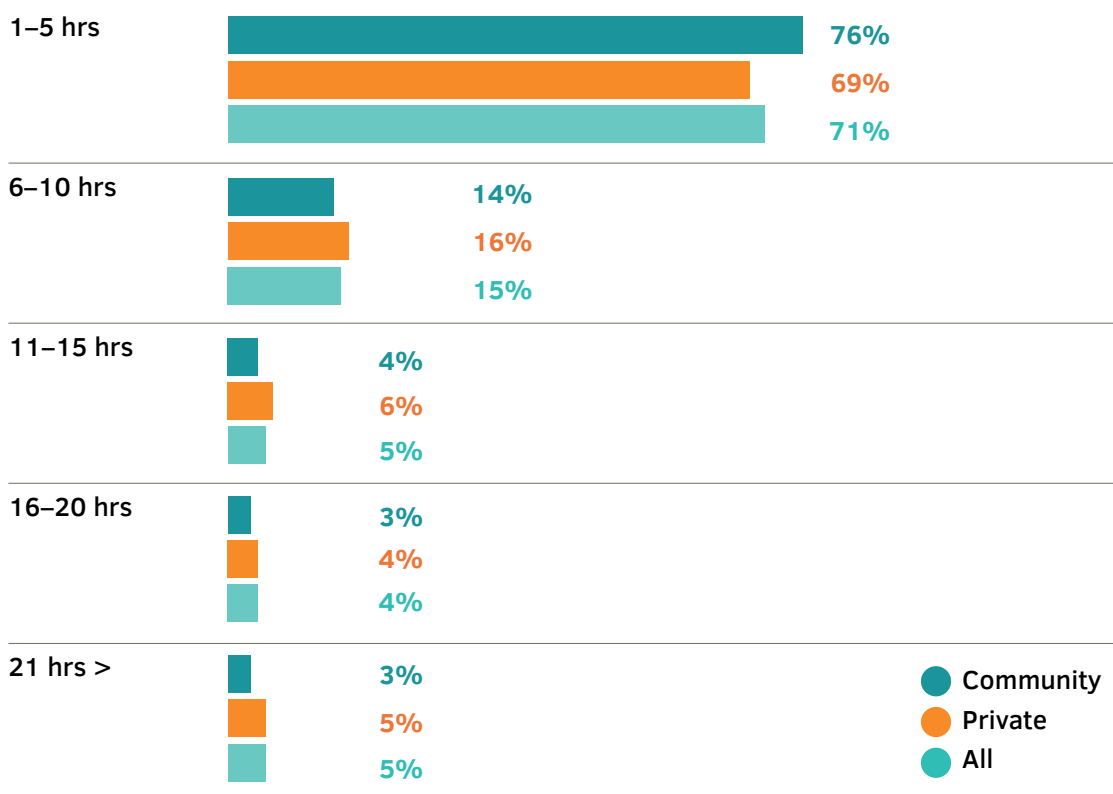


47 Contact hours are those used for staff working directly with children.
 48 The sum of contact hours and non-contact hours did not equal total hours worked for 495 staff and were therefore removed from analysis of the hours worked.
 49 Excluding relief staff.

7.7.2 Non-contact hours⁵⁰ per week

Respondents were asked to indicate the number of non-contact hours worked per week by each staff member⁵¹ who works directly with children. The majority of staff working directly with children (60%) worked at least one non-contact hour, with 40% reported as not working any non-contact hours. For the 60% of staff who worked at least one non-contact hour, the average number of non-contact hours worked per week overall was six hours. When looking specifically at managerial staff working with children, this average increased to 12 hours per week compared to an average of four hours per week for all other staff working directly with children. As can be seen in Figure 7.8, the largest percentage of staff work between one and five non-contact hours (71%). This proportion is higher for staff in community services (76%) compared to private services (69%). When compared to the previous year, staff have worked less non-contact hours in 2020/21, with a 1% decrease in the proportion of staff working 11-15 hours, 16-20 hours and 21 hours or more.

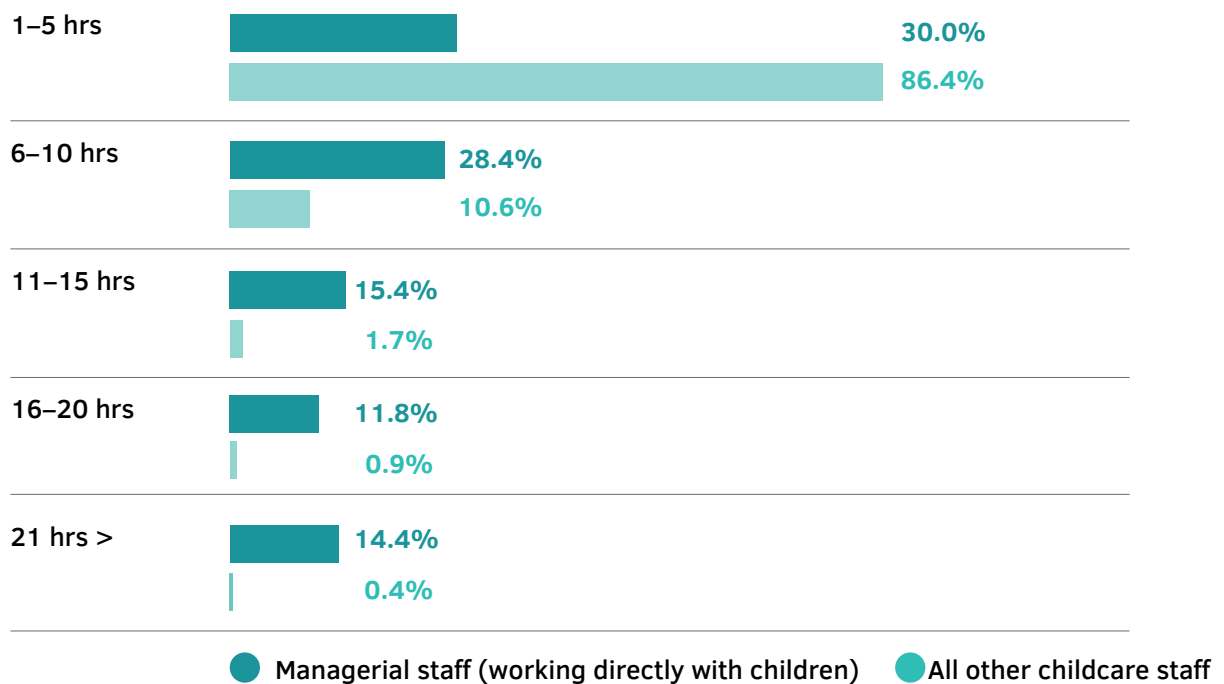
Figure 7.8: Percentage of staff working directly with children⁵² who work non-contact hours per week



As can be seen from Figure 7.9, managerial staff (working directly with children) tend to work more non-contact hours compared to other staff working directly with children. 70% of managers work six or more non-contact hours compared to 13.6% of staff working directly with children.

50 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 from these measures and working with parents.
 51 The sum of non-contact hours and contact hours did not equal total hours worked for 495 staff and were therefore removed from analysis of the hours worked.
 52 Excluding relief staff.

Figure 7.9: Percentage of managerial and other staff working directly with children⁵³ by average number of non-contact hours worked per week



7.8 Weeks paid per year

Respondents were asked to indicate the number of weeks paid per year for all staff working directly with children. Table 7.7 presents the number and percentage of staff by weeks paid per year. Over half (55%) of staff working with children⁵⁴ worked 50–52 weeks per year, followed by 29% of staff who worked between 38–42 weeks.

Table 7.7: Number and percentage of staff working directly with children (including managers) by weeks paid per year

Weeks paid per year	No. of staff	% of staff
Under 38 weeks ⁵⁵	1,165	8%
38–42 weeks	4,357	29%
43–49 weeks	1,178	8%
50–52 weeks	8,287	55%
Total	14,987	100%

53 Excluding relief staff.

54 Excluding relief staff as some of these staff may work in multiple services and therefore, may have been reported more than once in the survey (by different services).

55 A total of 108 staff were reported as being paid '0' weeks per year.

7.9 Length of time in service

Respondents were asked to indicate how long each staff member working directly with children had worked in their current service. As shown in Figure 7.10, the majority of employees (53%) had been in their current service for less than five years. 22% of staff were in their current service for over ten years, 2% less than 2019/20. Over two thirds of staff (67%) have been in their current service for longer than two years.

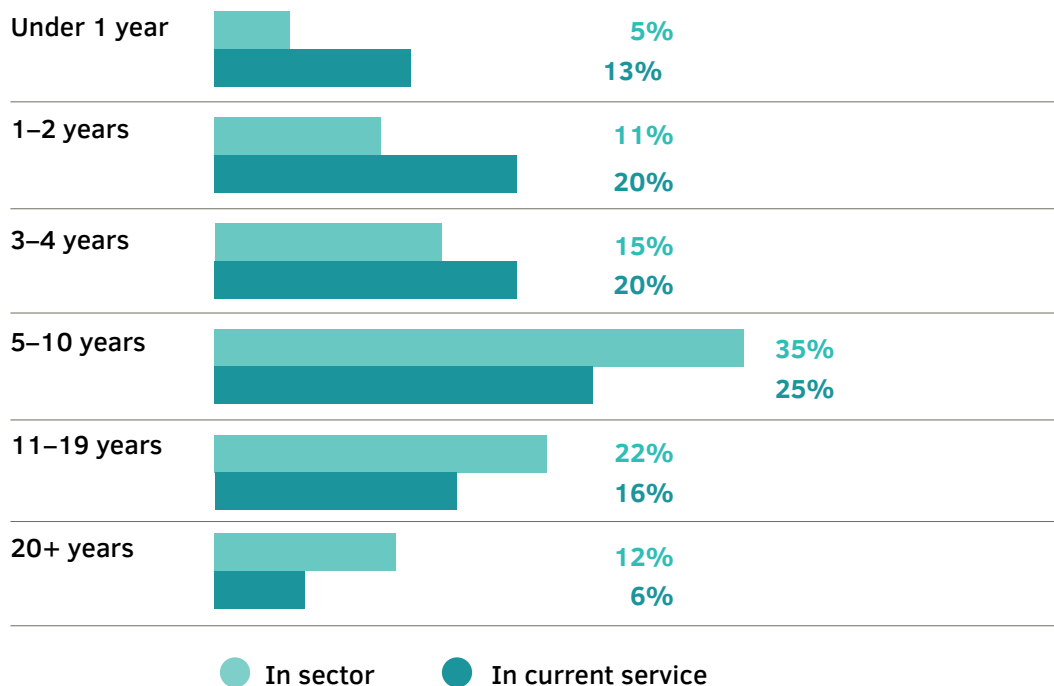
Figure 7.10: Breakdown of staff working directly with children by length of time in current service

Under 1 year	1,918	13%
1–2 years	3,007	20%
3–4 years	3,022	20%
5–10 years	3,705	25%
11–19 years	2,426	16%
20+ years	909	6%

7.10 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 7.11 indicates that there is inter-service mobility within the sector as staff move from one service to another. Among all staff, just 5% were new entrants (i.e. they entered the sector within the past year), 1% more than in 2019/20. However, 13% of staff were with their current service for less than one year indicating that most new staff in services have moved from another setting. At the other end of the spectrum, 34% of staff were in the ELC and SAC sector for over ten years, with 12% of staff having over twenty years of experience. These figures are similar to those recorded in previous years.

Figure 7.11: Staff working directly with children by length of time in current service and the ELC and SAC sector



7.11 Gender

Nurturing Skills: The Workforce Plan for Early Learning and Care (ELC) and School-Age Childcare (SAC), 2022–2028, includes an action: 'To promote gender balance and diversity in the workforce'. In 2020/21, the gender balance in the sector remained the same. Staff who worked directly with children were almost exclusively female (98%) which represents the same proportion of females reported every year⁵⁶ since 2015/16.

7.12 Job titles

The survey collected information on job titles for individual staff members. Respondents were given a list of job titles and 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. It is important to note that the survey was carried out before publication of *Nurturing Skills* where new titles were identified for a number of key roles in settings.

7.12.1 Staff who work directly with children⁵⁷

In most ELC and SAC services, 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 for each staff member.

⁵⁶ With the exception of 2019/20, when a question on gender was not asked.

⁵⁷ Including managers working directly with children.

Almost a half of all staff (48%) work primarily with ECCE children, with 20% as room leaders and 28% 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 7.12 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 (ECCE), whose share in the overall staff number increased by 2% from 26% in 2019/20 and centre managers and room leaders (ECCE) whose share in the overall staff numbers both decreased by 1% from 13% and 21% in 2019/20 respectively.

Figure 7.12: Staff working directly with children by job title

Early years assistant (ECCE)	4,254	28%
Early years assistant (non-ECCE)	3,074	21%
Room leader (ECCE)	3,029	20%
Room leader (non-ECCE)	1,813	12%
Centre manager	1,802	12%
Deputy manager	883	6%
Student placement/volunteer	132	1%

7.12.2 Ancillary staff⁵⁸

Staff working in catering and centre managers (not working directly with children) account for the biggest cohorts among ancillary staff (both 23%). Those working mainly in administration and maintenance together account for a further 42%. Figure 7.13 presents the numbers and percentages of ancillary staff by their job titles. When compared to 2019/20, the distribution of job titles remained similar, with the biggest change observed for maintenance staff whose share increased by 3%.

Figure 7.13: Ancillary staff by job title

Catering	716	23%
Centre manager	706	23%
Maintenance	677	22%
Admin/clerical	634	20%
Deputy manager	183	6%
Student placement/volunteer	113	4%
Transport	72	2%

⁵⁸ Including managers not working directly with children.

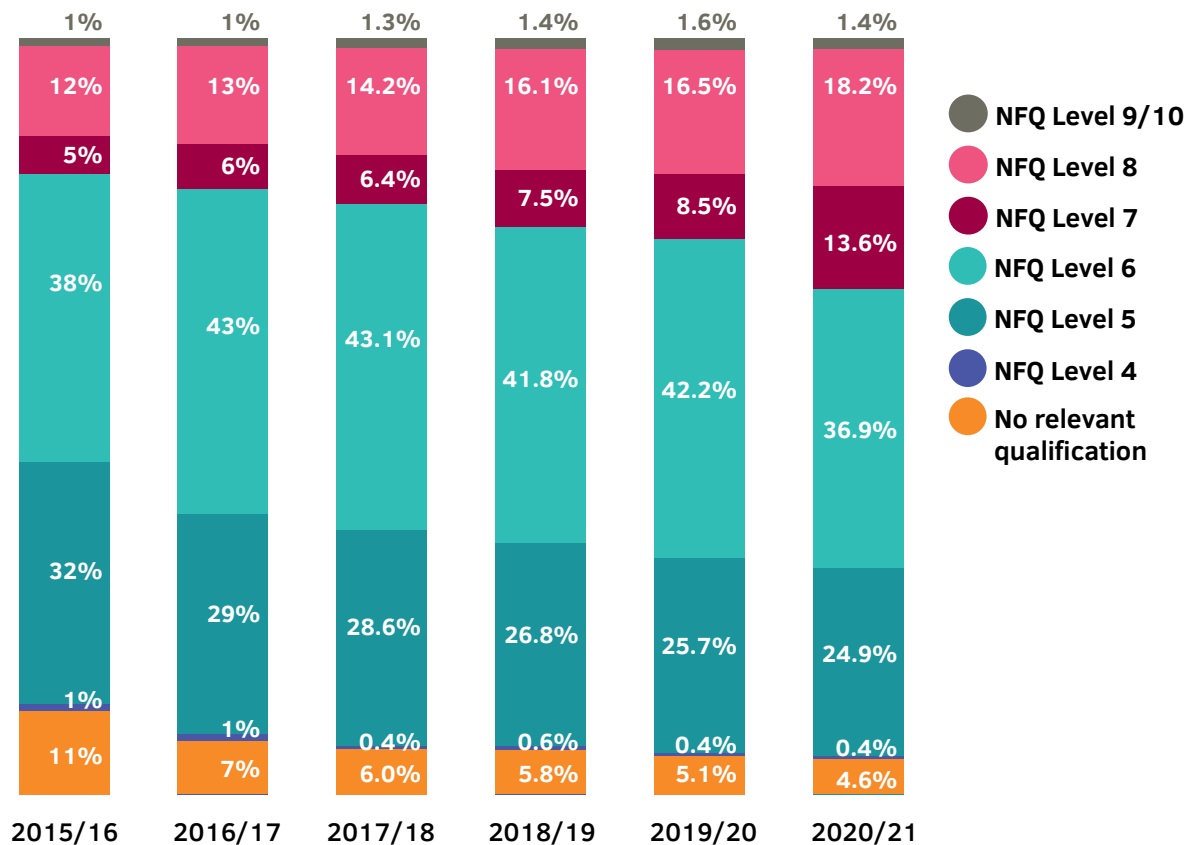
7.13 Staff qualifications

7.13.1 Highest staff qualifications

Respondents were asked to provide details of qualifications for staff working directly with children. In 2020/21, the total number of staff working directly with children with qualifications at NFQ Level 5 or higher was reported at 14,246. **This represents 95% of all staff working directly with children**, up one percentage point from what was reported in both 2018/2019 and 2019/20. However, this figure includes staff working only with school-age children. When staff working only with school-age children are excluded, 97% of staff working directly with children had a qualification at Level 5 or higher.

The proportion of staff with a qualification at NFQ Level 6 or higher was 70% (10,507). This was up from 69% last year and 67% two years ago. When staff only working with school-age children are excluded, the proportion is 72%. The proportion of staff with a qualification at NFQ Level 7 and above increased significantly from 26.6% in 2019/20 to 33.2% this year. When staff working only with school-age children are excluded, the figure is 34%. The biggest increase was seen at Level 7, with 13.6% staff qualified to that level in 2020/21 compared to 8.5% in 2019/20. This increase is mainly driven by managerial staff working directly with children, 45% of whom had a qualification at NFQ Level 7 compared to 7% of all other staff working directly with children. The year-on-year changes in staff qualifications are presented in Figure 7.14.

Figure 7.14: Staff working directly with children – percentage by highest level of qualification (from 2015/2016 to 2020/21)



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 an NFQ Level 5 qualification as at 31 December, 2016. The legislation exempts those who signed the *Grandfather Declaration* (as discussed in Section 7.13.4). 2020/21 marks the first time in four years where the proportion of staff with an NFQ Level 5 qualification or above increased: 95% of staff were reported as having an NFQ Level 5 qualification or above compared to 94% in the previous three years (Figure 7.15).

This includes staff who are on employment schemes or other Government funded programmes. When staff on these schemes/programmes are excluded, the proportion of staff (directly employed) with an NFQ Level 5 qualification or higher is 97%.

Figure 7.15: Percentage of staff working directly with children who have an NFQ Level 5 qualification or above (from 2010 to 2020/21)

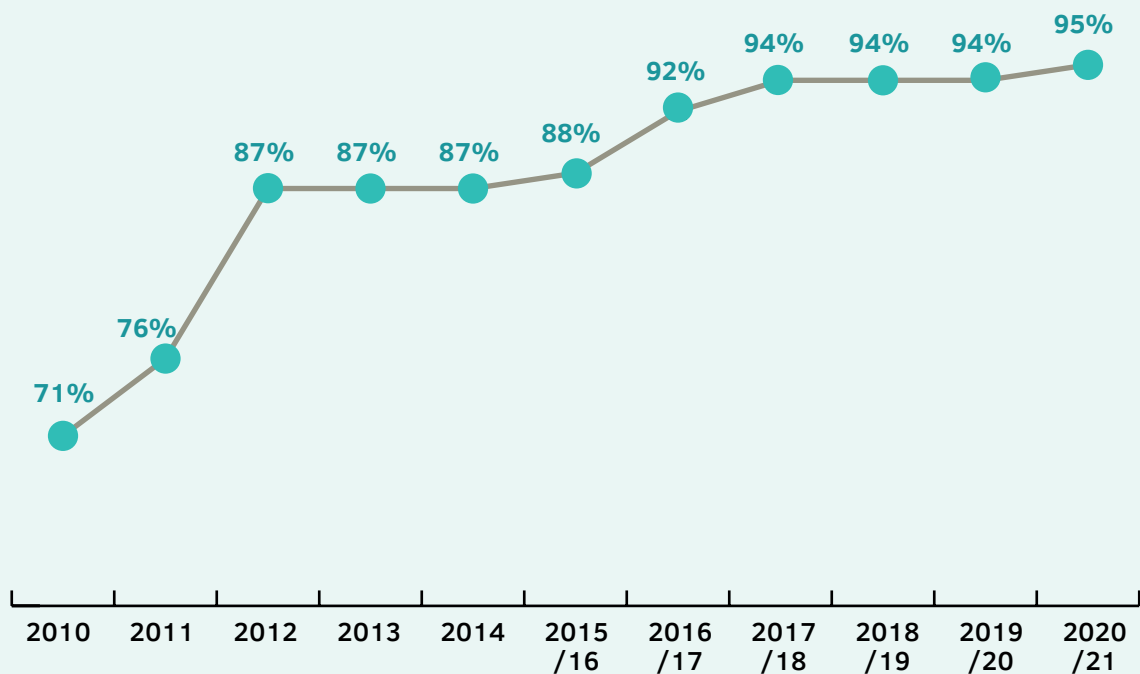


Table 7.8 provides further details on staff qualifications. On average, staff in private services have higher qualifications. Over two thirds of staff in private services (74%) have an NFQ Level 6 qualification or above compared to 64% of staff in community services. This difference may be linked to higher levels of staff in community services who are on employment schemes or Government funded programmes whose qualifications are lower – 23% of all staff on employment schemes/other Government funded programmes have an NFQ Level 6 or higher compared to 72% of direct employees.

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

Qualification level	Community		Private		All	
	Number of staff*	% of staff	Number of staff*	% of staff	Number of staff	% of staff
Total staff	6,006	40%	8,981	60%	14,987	100%
NFQ Level 5 or above	5,573	93%	8,673	97%	14,246	95%
NFQ Level 6 or above	3,858	64%	6,649	74%	10,507	70%
NFQ Level 7 Award (Ordinary Degree) or above	1,562	26%	3,410	38%	4,972	33%
No relevant qualification	399	6.6%	290	3.2%	689	4.6%
NFQ Level 4 Award	34	0.6%	18	0.3%	52	0.4%
NFQ Level 5 Award	1,715	28.6%	2,024	22.5%	3,739	24.9%
NFQ Level 6 Award	2,296	38.2%	3,239	36.1%	5,535	36.9%
NFQ Level 7 Award (Ordinary Degree)	649	10.8%	1,390	15.5%	2,039	13.6%
NFQ Level 8 Award (Honours Degree)	849	14.1%	1,872	20.8%	2,721	18.2%
NFQ Level 9/10 Award (Masters/PhD)	64	1.1%	148	1.6%	212	1.4%

7.13.2 Country in which staff member obtained qualification

Respondents were asked to provide details of the country where staff members obtained their ELC qualification. A total of 58 countries were represented. Of those staff who reported having an ELC qualification, the vast majority acquired these qualifications in Ireland (93%), see Table 7.9. By comparison, in 2019/20, the share of staff working with children who obtained their ELC qualifications in Ireland was almost the same, at 92.5%.

**Table 7.9: Staff working directly with children (including managers)⁵⁹
– country in which ELC qualifications were obtained**

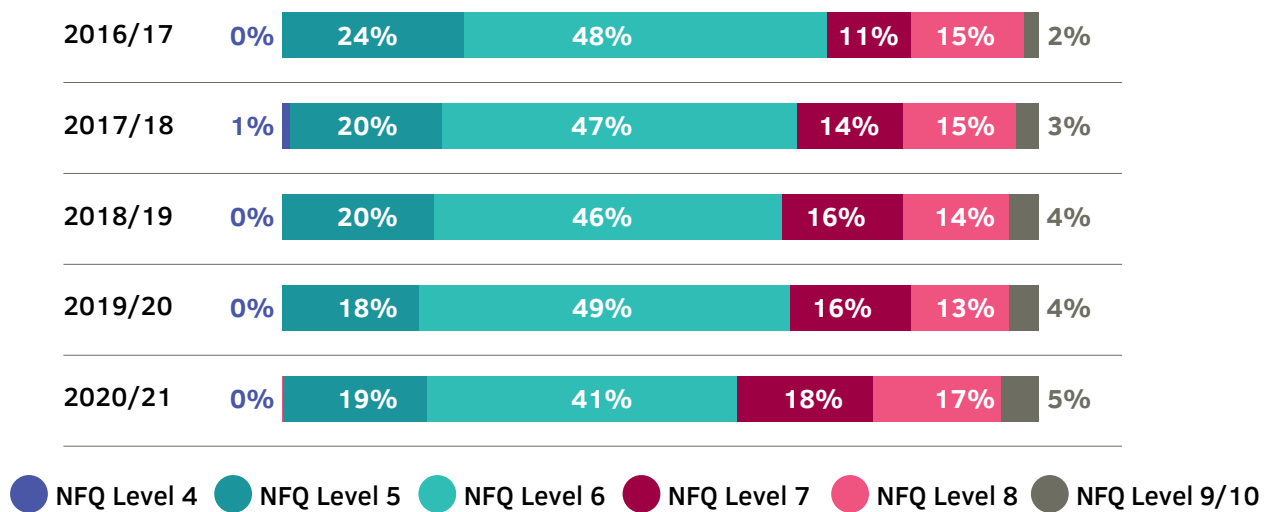
Country	Number of childcare staff working directly with children	% of childcare staff working directly with children
Ireland	13,286	92.9%
Spain	418	2.9%
United Kingdom	199	1.4%
Poland	115	0.8%
Brazil	30	0.2%
Romania	25	0.2%
Hungary	20	0.1%
Lithuania	17	0.1%
Italy	16	0.1%
United States	13	0.1%
South Africa	11	0.1%
Croatia	11	0.1%
Australia	10	0.1%
Other	127	0.9%
Total	14,298	100%

7.13.3 Qualifications in process

The survey asked respondents to provide details on 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, 1,981 staff, representing 13% of staff working with children, were in the process of acquiring a qualification. Figure 7.16 compares the levels of qualifications sought between 2016/17 and 2020/21 by the staff in process of obtaining a qualification. Most staff studying for higher qualifications planned to obtain an award at NFQ Level 6 and the proportion of those studying for this level decreased from 49% in 2019/20 to 41% this year, in favour of those studying for qualifications at Level 7 and Level 8.

59 Excluding relief staff.

Figure 7.16: Staff working directly with children – level of ELC qualification in process of attaining (from 2016/17–2020/21)



7.13.4 Staff with no qualifications

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 (741). Next, staff who belonged to any of the following categories were removed: student and volunteer placements, those who had signed a *'Grandfather Declaration'*⁶⁰ and those in the process of obtaining an NFQ Level 5 or above. As a result, a total of 244 staff working directly with children (1.6%) were identified as not yet qualified and not in the process of qualifying as at June 2021 (compared to 1.8% the previous year). When staff working with schoolgoing children only are removed from the above figure, a total of 38 staff working directly with children (0.3%) were identified as not yet qualified and not in the process of qualifying as at June 2021.

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 535 (3.6% of staff). In 2019/20, staff with no qualification represented 3.9% of staff working with children.

7.13.4 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 is any staff members who have signed a *'Grandfather Declaration'*. This declaration states their intention to retire or resign before 1 September, 2021⁶¹. Services reported 522 staff members who have signed the declaration. This represents 3% of staff which is down from 4% of staff in 2019/20. Of the staff reported to have signed the *'Grandfather Declaration'*, 405 (78%) had a relevant qualification of NFQ Level 5 or above, 117 staff had an NFQ Level 4 or no relevant qualification.

⁶⁰ For details on *'Grandfather Declarations'*, see section 7.13.4.

⁶¹ In recognition of the exceptional circumstances and disruption caused by the COVID-19 pandemic, an extension to the *'Grandfathering Declaration'* was made available to early years educators who agreed to undertake a relevant qualification during the period of the extension. The maximum duration of the extension, which will depend on the duration of relevant training courses, is two years from September 2021.

7.14 Age range of children worked with

The survey gathered data on the age range of children with whom each staff member primarily works. The majority of staff (62%) work primarily with children aged 3+ to 5 years. The smallest proportion of staff (4%) work primarily with babies as babies constitute the smallest cohort of all children (1% of all children enrolled). Table 7.10 presents a breakdown of staff by age range of children worked with. This breakdown is very similar to that of 2019/20.

In 2020/21, for the first time, respondents were asked to indicate if all staff working directly with children worked with schoolgoing children only. 13% of staff (1,887) worked only with schoolgoing children.

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

	Number of staff	% of staff
Up to 1 year	542	4%
1 year+ to 3 years	3,654	24%
3 years+ to 5 years	9,234	62%
5+ years	1,557	10%
Total	14,987	100%

7.15 Wages

7.15.1 Methodology

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

As many ELC and 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 their gross earnings for the previous month. This data also includes relief staff who work with children as it is likely that they may receive different wages in the different services where they provide cover.

Given the different nature of the wages for staff working directly with children and ancillary staff, results are presented separately.

7.15.2 Wages of staff working with children⁶²

The average hourly wage of staff working directly with children in the ELC and SAC sector in 2020/21 was €12.60. This average excluded managerial staff working directly with children to make it comparative with the previous year when it was €12.45. The average hourly wage for staff working directly with children was 1% higher in 2020/21.

The average hourly wage of staff working directly with children, when including managers working directly with children, was €13.20⁶³. In 2020/21, one out of two staff earned below the 'living wage' rate (€12.30 per hour). In Ireland, the living wage was reported to be €12.30 in 2020/21. The living wage refers to the level of earnings which make it possible for full-time employed adults (without dependents) to have a minimum acceptable standard of living⁶⁴.

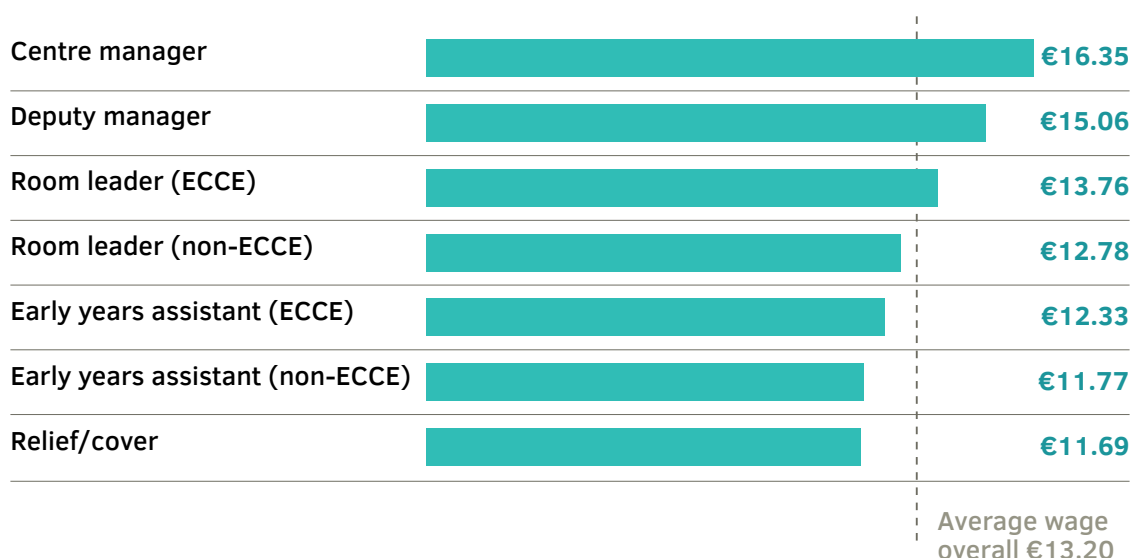
As staff wages are determined by a set of factors such as staff job title, experience or geographical location, these determinants are analysed in greater detail in the following sections using the data for staff working directly with children and managerial staff working directly with children.

7.15.2.1 Staff position/job title⁶⁵

Staff position within the service is one of the key determinants of wages. Centre managers earned the highest average wages among staff working directly with children at €16.35 per hour. The lowest average hourly wage was paid to relief/cover staff who earned €11.69 per hour, see Figure 7.17.

The average hourly wage for early years assistants (both ECCE and non-ECCE), who constitute 46% of all staff working directly with children, is €12.10 per hour, 20c below the 'living wage' for Ireland in 2020/2021 and 2% higher than in 2019/20.

Figure 7.17: Staff working directly with children (including managers)
– average hourly wage by job title



62 Including managers working with children.

63 This is the average wage based on the data for 14,543 staff who work with children, including managerial staff (working directly with children) and excluding staff on employment schemes/Government funded programmes (wages for these staff were excluded as many of the schemes/programmes define the earnings of their participants and services have no say in how much these staff earn).

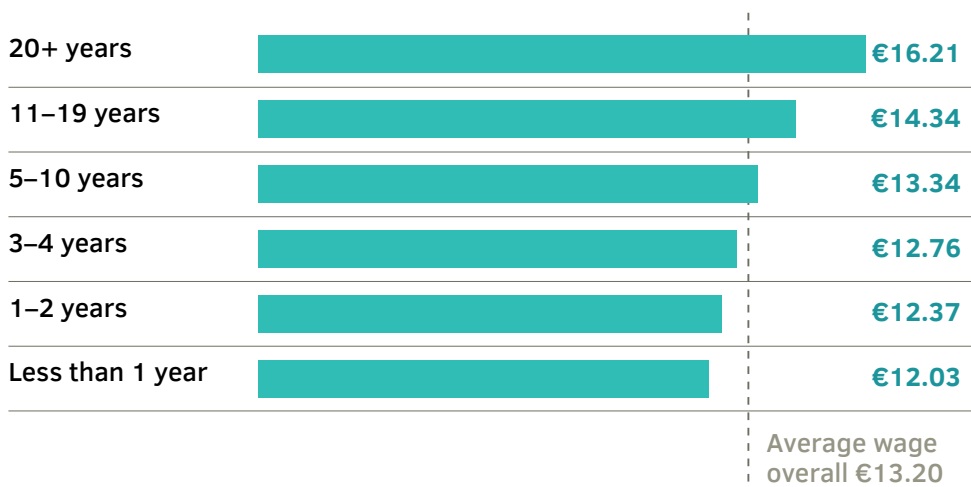
64 For information about the 'living wage' for 2020/21 see https://www.livingwage.ie/download/pdf/living_wage_2020__4_page_annual_paper.pdf.

65 This section also includes wage 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.

7.15.2.2 Length of time in service

The length of time staff worked in their current service has also been an important determinant of wages (see Figure 7.18). The average hourly wage for those working over 20 years in a service is €16.21, while the rate for those with less than one year's tenure in a service is €12.03 – a difference of €3.64 or 30%. In comparison to 2019/20 data, applying the same methodology used last year on this year's data, the gap between those with the longest tenure in a service and those with the shortest is 26% and has narrowed since last year by 5% from 31%.

Figure 7.18: Staff working directly with children (including managers)
– average hourly wage by length of time in current service



7.15.2.3 County

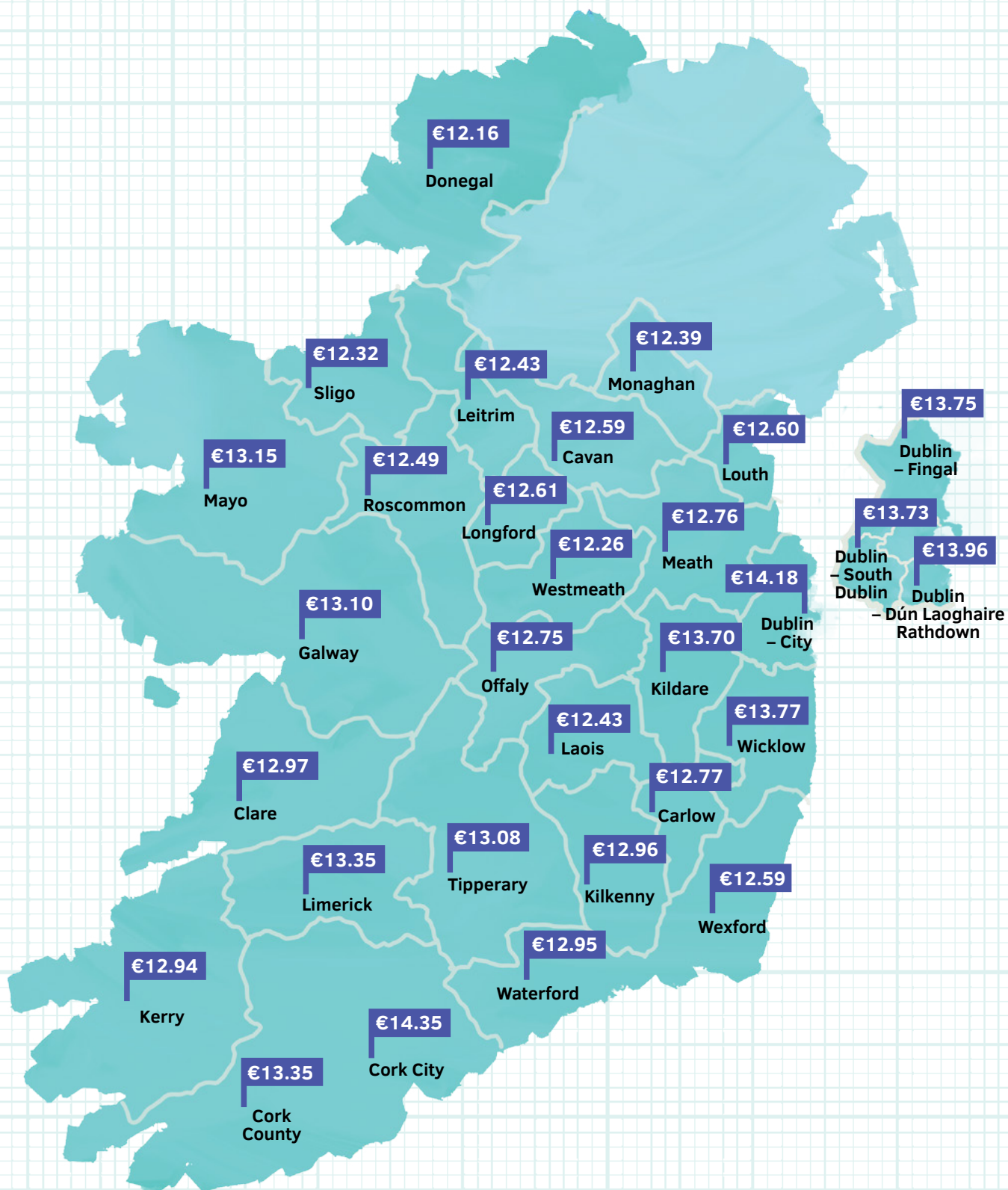
County was another determinant of wages. The average wages vary geographically. The average hourly wages range from €12.16 per hour in Donegal to €14.35 per hour in Cork City, a difference of €2.19 or 18%. This has changed since 2019/20, when the highest average wages were recorded in Dublin City (€13.48) and the lowest in Monaghan (€11.49). The highest rates of pay were recorded in Cork, Dublin, Wicklow and Kildare, while the lowest were in Donegal, Westmeath, Sligo and Monaghan. Figure 7.19 presents the breakdown of average wages of staff working directly with children by county.

Figure 7.19a: Staff working directly with children (including managers)
– average hourly wage by county

Cork City	€14.35
Dublin – City	€14.18
Dublin – Dún Laoghaire-Rathdown	€13.96
Wicklow	€13.77
Dublin – Fingal	€13.75
Dublin – South Dublin	€13.73
Kildare	€13.70
County Cork	€13.35
Limerick	€13.35
Mayo	€13.15
Galway	€13.10
Tipperary	€13.08
Clare	€12.97
Kilkenny	€12.96
Waterford	€12.95
Kerry	€12.94
Carlow	€12.77
Meath	€12.76
Offaly	€12.75
Longford	€12.61
Louth	€12.60
Wexford	€12.59
Cavan	€12.59
Roscommon	€12.49
Leitrim	€12.43
Laois	€12.43
Monaghan	€12.39
Sligo	€12.32
Westmeath	€12.26
Donegal	€12.16

Average wage
overall €13.20

Figure 7.19b: Staff working directly with children (including managers) – average hourly wage by county



7.15.2.4 Highest qualification attained

While staff qualification levels also have an influence on wages, the level of this influence is lower than other factors such as position or length of time in the service or the sector. Figure 7.20 presents the average hourly wage for different levels of qualifications for staff working directly with children (including managers). Those with the highest qualifications (NFQ Level 9 or 10) also earn the highest wages (€15.72 per hour), while those with NFQ Level 5 qualifications earn the least (€11.99 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 qualifications earn, on average, more than those who have NFQ Level 8. Those with NFQ Level 4 fare better than those who have NFQ Level 5. These anomalies on the overall relationship between qualifications and wages were also observed between qualifications and wages in the previous two years. This indicates that while qualifications are a driver of wages, their importance is not as significant as staff position, number of years working in the service or number of years worked in the sector.

Figure 7.20: Staff working directly with children (including managers) – average hourly wage by highest level of qualification attained








NFQ Level 4		€12.32
NFQ Level 5		€11.99
NFQ Level 6		€12.96
NFQ Level 7		€14.77
NFQ Level 8		€14.12
NFQ Level 9/10		€15.72
No relevant qualification		€12.14
		Average wage overall €13.20

Table 7.11 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 have been impacted by factors which have much stronger influence on the wages than qualifications (i.e. there were only 34 staff with NFQ Level 4 qualification). For this reason, the average hourly wages for staff with NFQ Level 4 qualification were not included.

Table 7.11: Staff working directly with children (including managers)
– average hourly wage by job title and highest level of qualification attained

Job title	NFQ Level 5 (N=3,591)	NFQ Level 6 (N=5,521)	NFQ Level 7 (N=2,007)	NFQ Level 8 (N=2,722)	NFQ Level 9/10 (N=208)	No relevant qualification (N=460)	Total (N=14,509)
Centre manager	€15.41	€16.87	€16.19	€16.22	€17.43	€15.60	€16.35
Deputy manager	€13.99	€16.03	€14.76	€15.62	€16.37	€14.15	€15.06
Early years assistant (ECCE)	€11.95	€12.46	€12.89	€12.84	€13.11	€12.70	€12.33
Early years assistant (non-ECCE)	€11.57	€11.89	€12.29	€12.31	€11.88	€11.51	€11.77
Relief/ cover	€11.52	€11.84	€11.55	€11.93	€13.50	€11.58	€11.69
Room leader (ECCE)	€12.69	€13.36	€14.18	€14.09	€14.82	€11.94	€13.76
Room leader (non-ECCE)	€12.36	€12.86	€13.45	€13.21	€12.89	€12.17	€12.78
Total	€11.99	€12.96	€14.77	€14.12	€15.72	€12.14	€13.20

7.15.3 Managerial staff wages

Respondents were asked to indicate the hourly wage for managerial staff (including managers working directly with children) in 2020/21⁶⁶. Table 7.12 shows the average hourly wage for managerial staff by those working directly with children and not working directly with children and whether they worked in community/private and urban/rural services. Overall, the average hourly wage for all managers was higher in community services (€17.64) compared to those in private services (€16.04) and higher in urban services (€17.00) than in services located in rural locations (€15.62). Managers not working directly with children earned higher average wages (€18.41) than those working directly with children (€15.92) across all types of services and locations.

Table 7.12: Managerial staff average hourly wage by manager type organisation type and urban/rural location

	Managerial staff		
	Working directly with children	Not working directly with children	Overall
Community	€16.40	€20.00	€17.64
Private	€15.75	€17.20	€16.04
Urban	€16.33	€18.74	€17.00
Rural	€15.24	€17.41	€15.62
All	€15.92	€18.41	€16.52

66 In 2019/20, respondents were asked if managers (including managers working with children) were on an hourly wage, annual salary or other (i.e. drawing non fixed income from the business).

7.15.4 Ancillary staff wages

Services were asked to report details of the average hourly wage for ancillary staff (excluding managers). The average wage was reported as €12.77. Figure 7.21 presents the average hourly wage by job title. In general, those in administrative/clerical positions earned the highest hourly wage (€14.46). Catering and maintenance staff on average earned below the 'living wage' of €12.30 at €12.08 and €11.89.

Figure 7.21: Ancillary staff (excluding managers not working directly with children) average hourly wage by job title

Admin/clerical		€14.46
Catering		€12.08
Maintenance		€11.89
Transport		13.02

7.16 Staff turnover

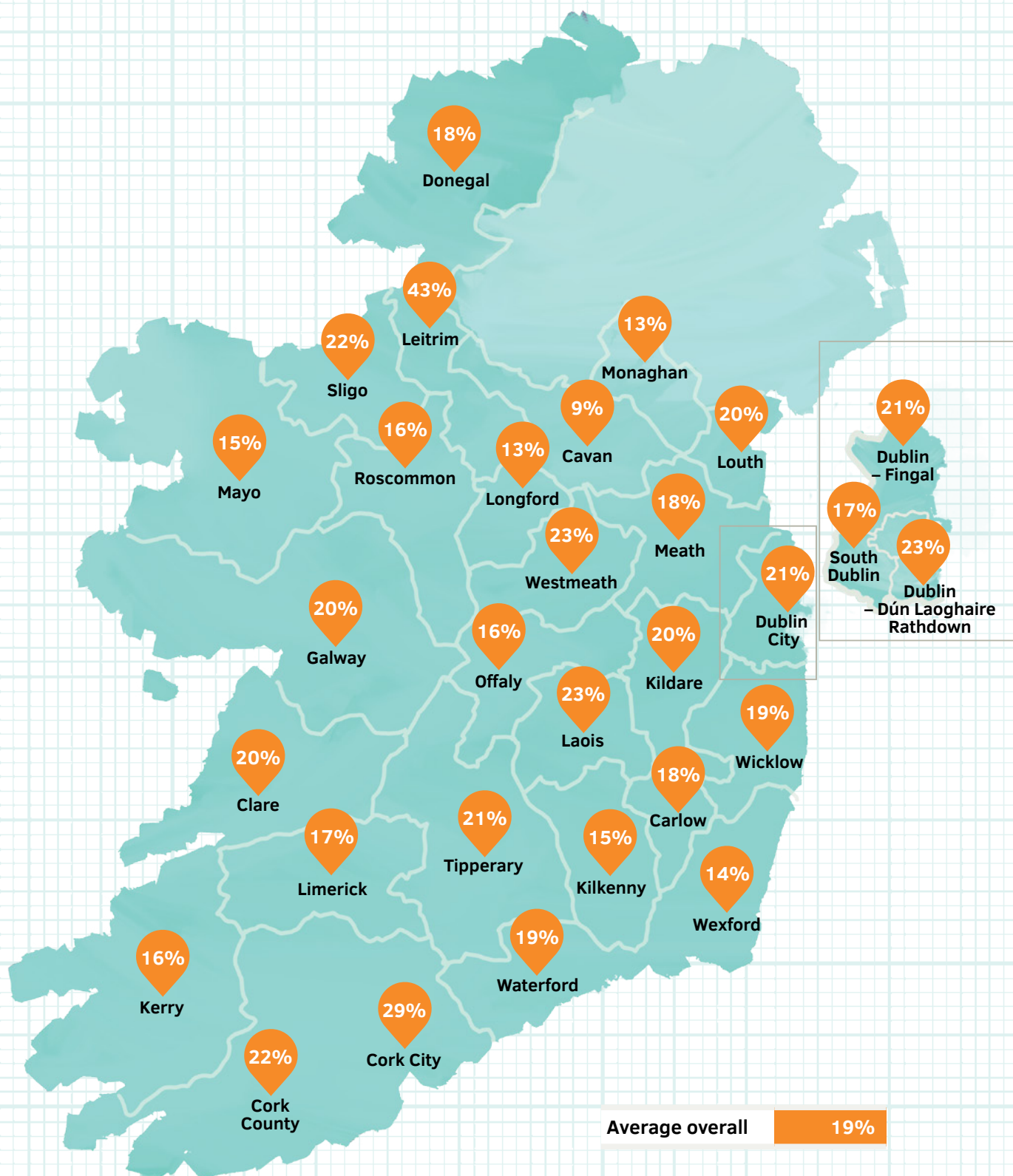
The data presented in Section 7.10 (*Length of time working in the ELC and SAC sector*) suggests considerable levels of inter-service mobility or staff turnover. An analysis was undertaken to identify the rate of staff turnover for staff working directly with children in ELC and SAC services. The methodology used to establish the turnover rate for each service involved factoring out any possible reduction or expansion in staff numbers. Four data types were used to calculate turnover as follows:

- Number of staff working in the service
- Number of staff who left in the past twelve months
- Number of staff working in the service who had worked there for less than twelve months
- Number of staff vacancies at the time of completing the survey.

Where a staff member had left the service 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 the service 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 rejoined a service within the past 12 months and are therefore not captured in the calculations.

The annual staff turnover rate was 19%. This is up one percentage point on the 2019/20 figure which was 18%. Table 7.22 shows the average rates of staff turnover by county. The highest rate was in Leitrim (43%) and the lowest in Cavan (9%). In 2019/20, the county with the highest turnover was Dublin – Dún Laoghaire-Rathdown (38%), while the lowest turnover rate was recorded in Roscommon (11%).

Table 7.22: Average staff turnover rates per county



Respondents were asked for details on staff retention and the destinations of the staff who left employment in an ELC and SAC service during the last year. As Table 7.13 shows, the majority of services (57%) retained all their staff during the 12 months up to the completion of the survey. The proportion of services retaining all staff decreased by 7% on the previous year when 64% of services reported retaining all staff. Additionally, the share of services which lost more than three staff increased from 5% in 2019/20 to 7% this year.

The highest retention rates are in private services and in services located in rural areas where 58% and 61% of services retained all their staff respectively.

Table 7.13: Staff retention and loss by organisation type and urban/rural location

	Community	Private	Urban	Rural	All
Retained all staff	55%	58%	55%	61%	57%
Lost 1 staff member	23%	22%	22%	22%	22%
Lost 2 or 3 staff members	16%	13%	15%	12%	14%
Lost more than 3 staff members	6%	7%	8%	5%	7%

When the size of service is taken into account, 70% of small services retained all their staff compared to 39% of medium services and 27% of large services, see Table 7.14.

Table 7.14: Staff retention and loss by size⁶⁷ of service

	Small	Medium	Large
Retained all staff	70%	39%	27%
Lost 1 staff member	20%	27%	24%
Lost 2 or 3 staff members	26%	44%	35%
Lost more than 3 staff members	4%	17%	37%

In total, services reported 2,265 staff leaving employment 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 28% had gone to another ELC and SAC service, 44% had left the sector, 11% had left Ireland, 9% permanently left the service for reasons related to COVID-19 (not including temporary layoffs) and respondents were unsure of the destinations for the remaining 8%.

Services were asked to indicate the level of qualification of staff who left employment in their service. Of the staff who departed, 91% had an NFQ Level 5 qualification or above, 6% 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 who left (see Table 7.15). Staff qualified to NFQ Level 7 or above were more likely to leave their employment in private services (34%) and those located in urban areas (33%).

67 The size of the service was determined based on capacity (children enrolled + vacant places). Small services have capacity between 3 and 49, medium between 50 and 99 and large 100 and above.

Table 7.15: Level of qualification of staff working directly with children who left the service in the past 12 months by organisation type and urban/rural location

	Community	Private	Urban	Rural	Total
Total number of staff who left	756	1,580	1,662	674	2,336
% of staff who left in last 12 months by level of qualification:					
NFQ Level 4 or no relevant qualification	8%	5%	6%	6%	6%
NFQ Level 5	26%	24%	24%	25%	24%
NFQ Level 6	35%	34%	34%	37%	35%
NFQ Level 7 or above	28%	34%	33%	30%	32%
Don't know	3%	3%	3%	2%	3%

7.17 Staff vacancies

Providers were asked to report on the number of staff vacancies in their service. Of those services who responded to this question, 29% (732⁶⁸) reported having at least one staff vacancy. This is up from 16% in 2019/20. The total number of vacancies reported by survey respondents was 1,338.

Respondents were asked to categorise the number of vacancies in their service by specific staff qualifications (see Table 7.16). The majority of vacant positions were for staff with NFQ Level 6 qualifications at 34% (461 vacancies) followed by NFQ Level 5 qualifications at 34% (455 vacancies). 3% of services stated that they did not know the level of qualification for their staff vacancies.

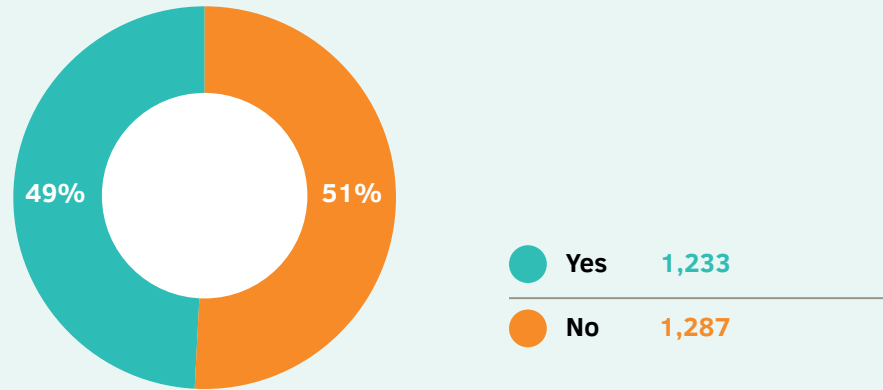
Table 7.16: Number and percentage of vacancies for staff working directly with children by level of qualification

	No. of vacancies	% of vacancies
NFQ Level 4/No qualification	77	6%
NFQ Level 5	455	34%
NFQ Level 6	461	34%
NFQ Level 7 or above	308	23%
Don't know	37	3%
Total	1,338	100%

68 Staff vacancies were blank for one service and therefore, it was not included in this analysis.

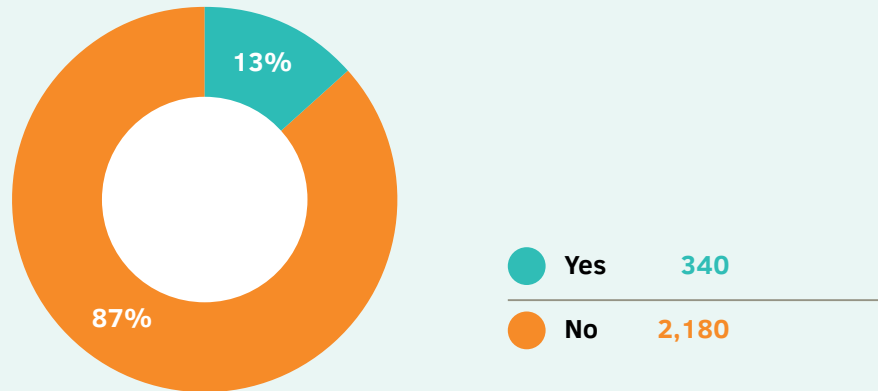
Services were also asked if they had experienced challenges in recruiting suitably qualified staff over the past 12 months. 49% of services reported experiencing such challenges (see Figure 7.23). This is up 5% on 2019/20.

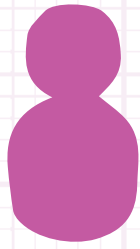
Figure 7.23: Services who experienced challenges in recruiting suitably qualified staff in last twelve months



In addition, services were asked if they had actively recruited/advertised for staff living overseas in the past 12 months. 13% of services stated that they had done so compared to 10% in 2019/20, see Figure 7.24.

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





Child protection



KEY STATISTICS

49%
of services

need further support and training
in child protection

a reduction of

6%
on previous
year

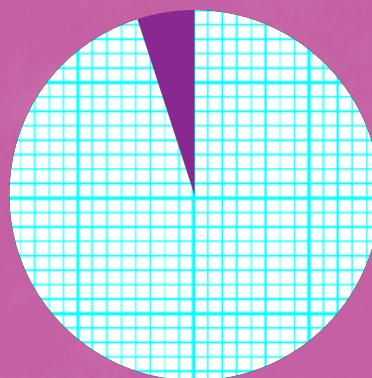


>99%
of services

had a 'Child Safeguarding
Statement' on display and
a 'Child Protection Policy'
in place

4 out of 5
services

that required further
training needed
training in 'Children First'



95%
of services

had staff trained
in 'Children First'
in the last three years



8.1 Introduction

The *Children First Act 2015* (The Act) places a number of statutory obligations on specific groups of professionals and on particular organisations providing services to children.

Through the provisions of the Act, it is intended to:

- Raise awareness of child abuse and neglect;
- Provide for mandatory reporting by key professionals;
- Improve child safeguarding arrangements in organisations providing services to children;
- Provide for cooperation and information sharing between agencies when Tusla – Child and Family Agency is undertaking child protection.

Guidelines such as *Children First: National Guidelines for the Protection and Welfare of Children 2017* and best practice standards under which the sector operates outline various elements required to achieve the policy goal of child safety.

As part of these regulations, Early Learning and Care (ELC) and School-Age Childcare (SAC) providers are required to develop a *Child Safeguarding Statement*. This is a written statement which specifies the service being provided and the principles and procedures to be observed to ensure, as far as predictable or possible, that a child availing of the service is safe from harm. Staff, particularly those working directly with children, should also receive adequate training to enable them to recognise and understand the signs of abuse or neglect.

The Service Profile survey included questions on various aspects of child protection⁶⁹. Table 8.1 presents the overall results for the four main questions asked. These responses are discussed in more detail in the following sections.

Table 8.1: Percentage of services with a ‘Child Safeguarding Statement’ on display, a written ‘Child Protection Policy’ and staff trained in child protection

	Community	Private	All
% of services with a ‘Child Safeguarding Statement’ on display	99.5%	99.4%	99.4%
% of services with a ‘Child Protection Policy’ in place	99.9%	99.5%	99.6%
% of services with staff trained in ‘Children First’ in the last three years	94.3%	95.3%	95.0%
% of services who reported needing more support	51.9%	47.1%	48.7%

8.2 Child Safeguarding Statement

The vast majority of respondents reported having a *Child Safeguarding Statement* on display (2,505 or 99.4% - compared with 97.9% in 2018/19). The county breakdown shows that 100% of respondents in 19 counties reported they had a *Child Safeguarding Statement* on display. In a further 11 counties, the share of services was between 97% and 99%. The lowest percentages were recorded in counties Clare (97.1%) and Laois (97.7%).

8.3 Child Protection Policy

In line with the *Children First Act 2015*, respondents were asked whether they had a written *Child Protection Policy* in place and, if so, to specify the date on which the policy was last reviewed. A total of 99.6% (2,510) services reported having such a policy. Of the respondents who provided details on the date when the policy was last reviewed, 96.3% of services reviewed their policy within the last three years (June 2018–June 2021). A higher proportion was reported in 2018/19 at 99.6%.

⁶⁹ Questions related to child protection were not asked in the survey in 2019/2020 but had been asked in previous years.

8.4 Child protection training

Children First: National Guidance for the Protection and Welfare of Children 2017 states that all persons working directly with children have a duty of care to protect them from harm and to promote their welfare. To do so, they should be equipped with the appropriate knowledge and tools to initiate the requisite steps if and when signs of abuse or neglect are observed. In this context, the survey asked services to specify how many of their staff, if any, had received 'Children First' training in the preceding three years. 95% of services had staff who had received training within that period (See Table 8.1).

The proportion of private services (95.3%) is slightly higher than that of community services (94.3%), 100% of respondents in counties Carlow and Laois reported that they had staff who had received 'Children First' training in the preceding three years, while the share of services in Mayo with staff who had received 'Children First' training was the lowest (86.9%) (See Table 8.3).

8.5 Further support with child protection

Respondents were also asked to state whether staff in their service required further training and support in the area of child protection, and if 'yes', to state the type of training and support required. Respondents were presented with a prescribed list which included 'other' as an option should the support they require not be listed and were invited to select all applicable options from the list (see Table 8.2).

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

Further support and training options	Community		Private		All	
	Number	%	Number	%	Number	%
Number of services requiring further support and training	418	51.9%	808	47.1%	1,226	48.7%
Number of services not requiring further support/training	387	48.1%	907	52.9%	1,294	51.3%
Of the services requiring further support and training (1,226), the following options were specified:						
Developing or updating a 'Child and Welfare Protection Policy'	147	35.2%	300	37.1%	447	36.5%
Training in 'Children First'	330	78.9%	656	81.2%	986	80.4%
Training for the Designated Liaison Person (DLP)	300	71.8%	549	67.9%	849	69.2%
Garda vetting for staff	47	11.2%	114	14.1%	161	13.1%
Development of a code of behaviour for working with children	175	41.9%	318	39.4%	493	40.2%
Other	75	17.9%	130	16.1%	205	16.7%

Of all respondents to the survey, just under half (48.7%) stated that staff in their service required further training and/or support in the area of child protection which represents a reduction of 6.2% since the last time this question was asked in 2018/19. More community services required further training/support (51.9%) than private services (47.1%). This represents a reduction of 7.1% and 6.3% respectively since 2018/19.

As in previous years when this question was asked, the largest share of services (80.4%) required training in '*Children First*', an increase of 28.6% since 2018/19, followed by training for the Designated Liaison Person (DLP) (69.2%), an increase of 27.3% in the past two years. As was the case in 2018/19, training or support on the development of a code of behaviour for working with children was the third highest training need identified (40.2%), an increase of 11.2% since 2018/19.

In six counties, 60% or more of services indicated the need for further support/training (Leitrim, Roscommon, Louth, Westmeath, Cork City and Cork County), see Table 8.3. Leitrim was the county with the highest number of services who required further support and training (65.0%), while Meath had the lowest percentage (29.4%).

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

County	% of services which have a 'Child Safeguarding Statement' on display	% of services which have a 'Child Protection Policy' in place	% of services with staff trained in 'Children First' in the last three years	% of services who reported needing more support
Carlow	100.0%	100.0%	100.0%	36.4%
Cavan	100.0%	100.0%	94.9%	41.0%
Clare	97.1%	100.0%	95.7%	39.1%
Cork City	98.0%	100.0%	89.8%	61.2%
Cork County	99.1%	100.0%	89.6%	60.6%
Donegal	100.0%	98.9%	96.7%	51.6%
Dublin – Dublin City	99.1%	100.0%	96.2%	43.6%
Dublin – Dún Laoghaire-Rathdown	98.9%	100.0%	96.6%	52.9%
Dublin – Fingal	98.7%	99.3%	98.0%	44.4%
Dublin – South Dublin	99.2%	99.2%	94.4%	51.6%
Galway	100.0%	99.4%	94.5%	44.8%
Kerry	98.9%	100.0%	95.8%	41.1%
Kildare	98.9%	100.0%	98.9%	49.4%
Kilkenny	98.4%	98.4%	93.8%	43.8%
Laois	97.7%	100.0%	100.0%	45.5%
Leitrim	100.0%	100.0%	90.0%	65.0%
Limerick	100.0%	100.0%	93.5%	43.5%
Longford	100.0%	100.0%	96.3%	48.1%
Louth	100.0%	98.8%	95.0%	62.5%
Mayo	100.0%	98.8%	86.9%	54.8%
Meath	100.0%	100.0%	96.5%	29.4%
Monaghan	100.0%	100.0%	97.1%	45.7%
Offaly	100.0%	100.0%	95.2%	45.2%
Roscommon	100.0%	100.0%	88.6%	63.6%
Sligo	100.0%	100.0%	93.3%	48.9%
Tipperary	100.0%	99.3%	97.1%	45.7%
Waterford	100.0%	100.0%	94.9%	37.3%
Westmeath	100.0%	97.7%	95.5%	61.4%
Wexford	100.0%	99.0%	97.9%	54.6%
Wicklow	100.0%	100.0%	97.7%	50.0%
Total	99.4%	99.6%	95.0%	48.7%



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