This document contains the results from the surveys returned from group providers identified as offering early years and childcare on either a full day basis or sessional / extended care/wraparound care basis. These providers form the private, voluntary and independent sector and identify themselves in the main as Day Nursery or Pre Schools.

Day care and Preschool/session provision	**Provider Return Rate 40%**	**Covering Postcode Area**	**RG2, RG4, RG5, RG6,RG7, RG10. RG40, RG41, RG45**

The survey attracted a 40% return rate from the providers in the Wokingham borough in the postcodes areas identified above. The respondents represented by approximately 15% of day nurseries and 75% pre schools.

Respondent profiles

90% of the group providers have been in operation for over 10year. A small proportion (5%) have operated for less than 10yrs but more than 3, and the remaining 5% being considered relatively new with operational years of three or less.

They all tend to operate very differently, vary in size, management and location.

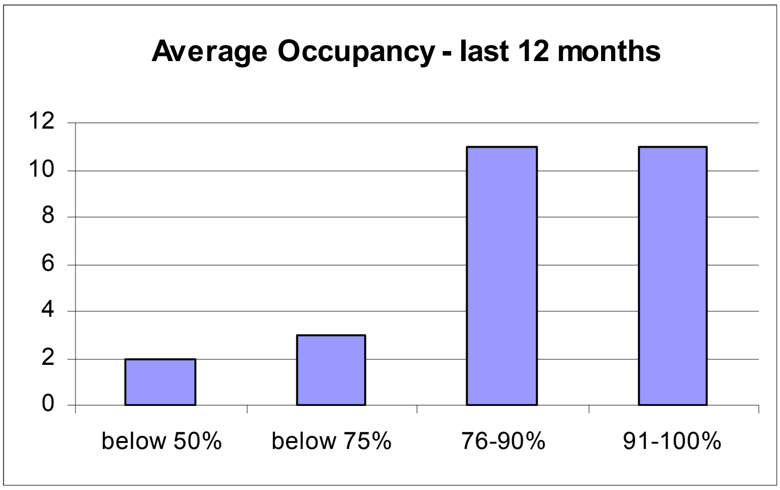
Whilst 33% operate on a school site the other 67% are located within the local community.

Of those operating on a school site, 43% are incorporated within the main school building and the remaining 57% are in other premises contained within the school grounds.

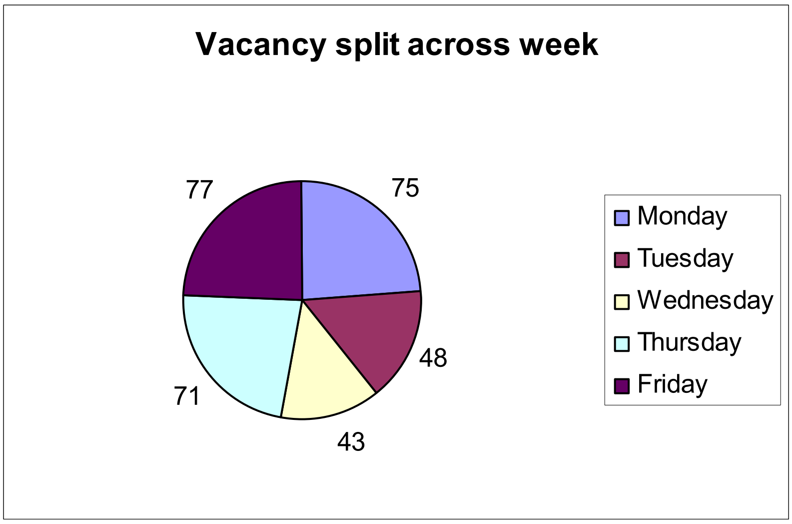
For the 67% operating on non school sites a variety of buildings and premises are used. These range from Community, Youth and Sports buildings, Leisure Centres to Village and Church halls as well as the organisations own building.

Regardless of where these groups are situated the leasing arrangements varied. Whereas 59% of providers stated that they had formal leasing (building /land) or licensing arrangements in place. More worryingly there remained 41% where there were no formal agreements or arrangements in place.

Take up of places



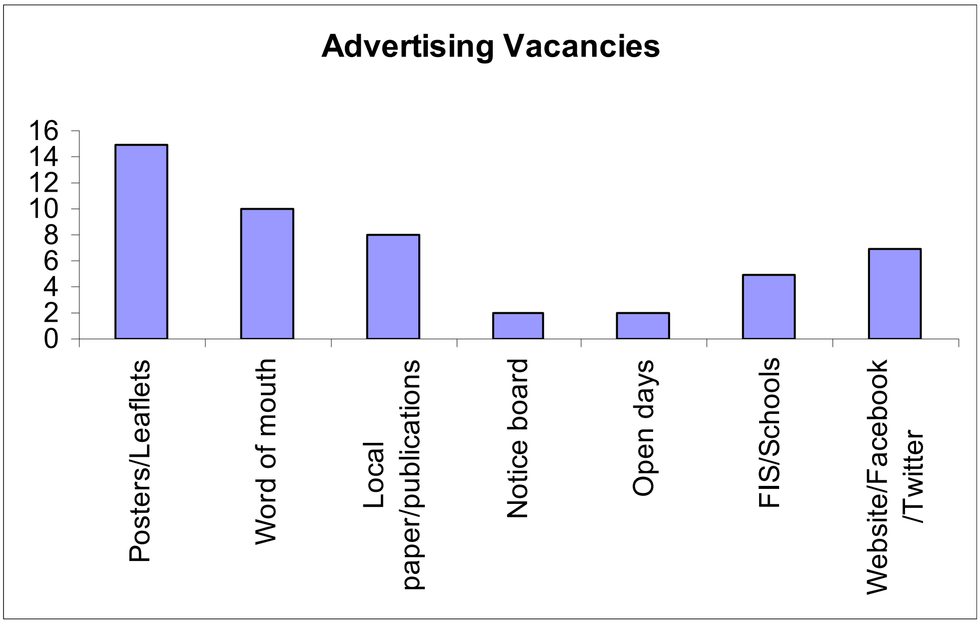
41% of providers reported consistent high occupancy rates at approximately 91% or above with around the same percentage being three quarters or more full The remaining 22% experienced fluctuating occupancy rates. With 40% being have less than half of their available places being taken up on a regular basis during the 12 month period prior to the survey taking place.



Providers were asked what vacancies, if any, they had at the time of completing the survey. 51% of respondents reported that they did, this totalled 314 places. On reviewing the vacancy split it showed that midweek places (Tuesday and Wednesday) were taken up more than Monday, Thursday and Fridays. This has been attributed to part time working and more recently changing working patterns. Many providers have found that many parents work from home therefore do not necessarily use childcare on those days. In addition, informal care arrangements involving grandparents and family tended to be more prevalent on those days.

Marketing

When asked how providers undertook their marketing to manage vacancies and take up the methods they employed were varied. Some chose to use a few key methods whilst others took a scattergun approach and using all available avenues.



The most popular method is the distribution of leaflets and posters, usually within the local community. Word of mouth was also cited as popular and reliable. Although local publications were also used, these tended to attract a cost, or higher cost compared to that of producing leaflets (home computers taking over from traditional printing methods, therefore being more accessible) therefore tended not to be used frequently. Information technology has further developed marketing potential with many providers opting to use their own websites or social networking sites such as Facebook and Twitter. Reflecting the way consumers actively seek out information and make choices in relation to services.

Schools and the Family Information Service were also regarded as positive opportunities to market the provision, with Open Days and notice boards still being used but by a few providers only.

Waiting Lists

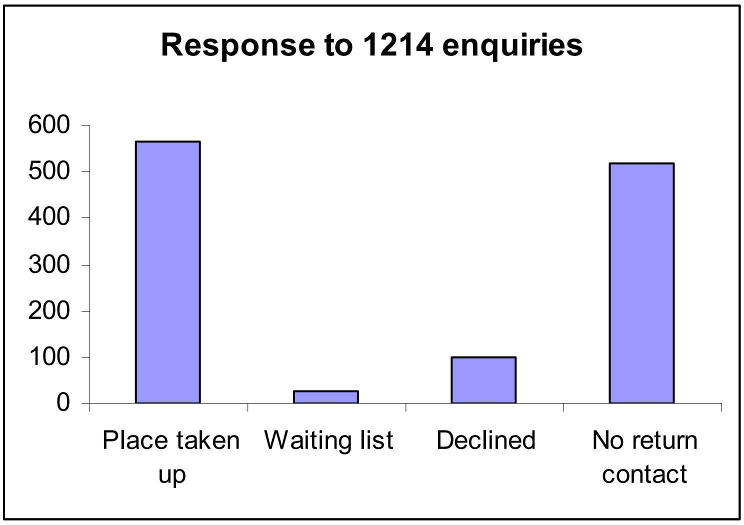
From those providers who responded to the survey there were approximately 669 children on waiting lists for a reasons of parental choice, e.g. preferred day/session not being available, confirming the data that Tuesdays, Wednesdays and to some degree Thursdays being the most popular days, therefore users preferred to wait. Some providers reported that parents were putting siblings on waiting lists early in the hope of securing a place when the child reached the age of admission others recognised that parents often put names own multiple waiting lists.

Not all providers were able to specify whether those on the waiting list wanted to take up a part time or full place. However those that do track this identified that of those parents on the waiting list, 88% were for part time places and 12% for full time places.

An argument can be presented that vacancies and waiting lists may or may not reflect supply/demand and sustainability issues effectively. As a setting may have vacancies but not to suit days/times of some users who opt to go on the waiting list in preference to having some provision which may not meet their specific choice or requirements.

Similarly, a waiting list does not mean there is a lack of sufficient places generally, but again, places which do not meet all parental needs. However it does mean for some providers there is a need to review the service they are offering to balance this up with the demand and take up in order to remain sustainable. For instance, an argument against a setting offering a service 5 days per week when there is little demand on a Monday and Friday may consider reducing the service. However this has to be balanced with the changing and fluctuating needs of the market not just current but future.

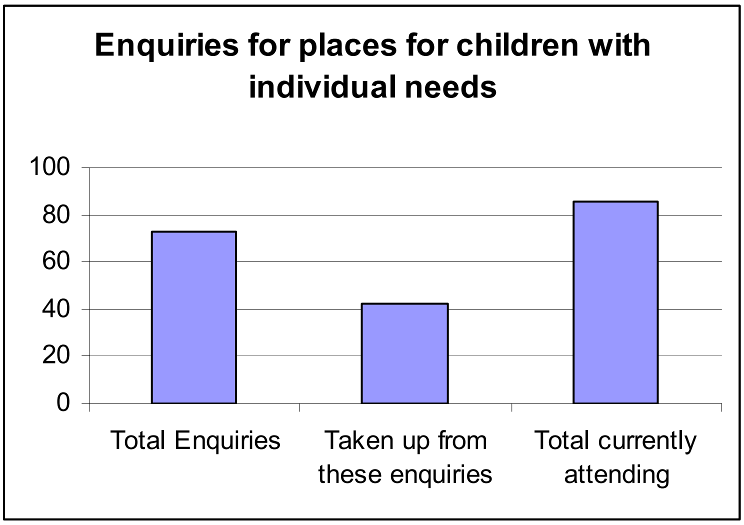
Providers



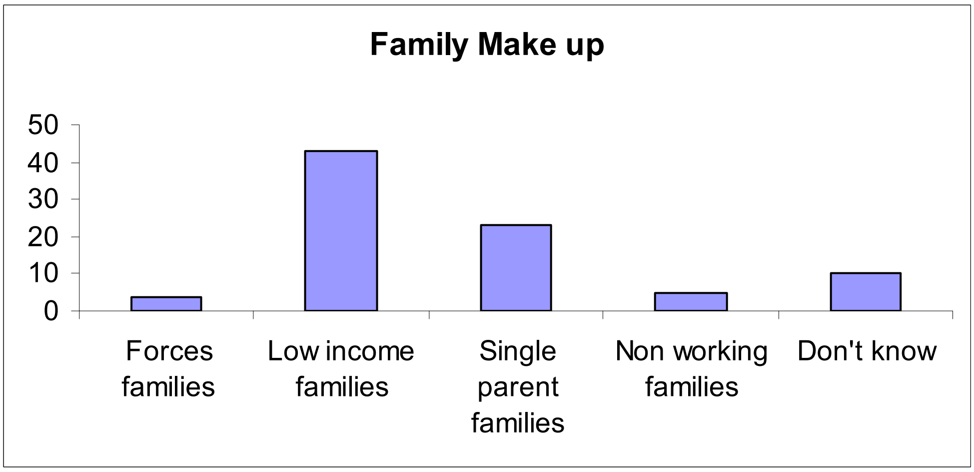
Approximately 47% of enquiries result in places being taken up; 8% decline place offered; 2% go on waiting list.

6% of enquiries come from parents seeking a place for their child who has individual needs (social, learning or physical) 58% go on to take up the place offered by the setting

The remaining 43% have no further contact. 58% of providers do not follow up enquirers who do not come back to book a place. Some because they were full and did not have a place to offer. For others is mainly due to Admin constraints and time, providers felt it was not worth this investment,



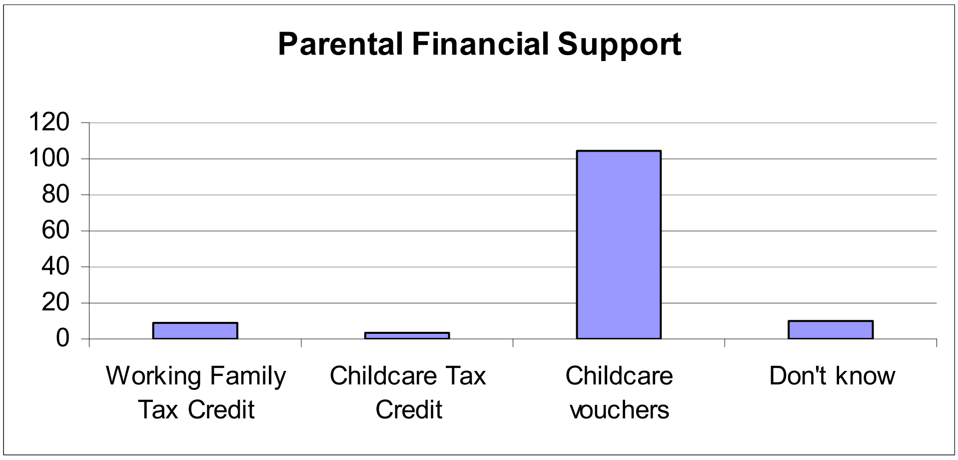
Approximately 86 children with individual needs attend the 27 settings who responded with all providers highlighting areas of need for the group to better support these children. 78% highlighted that funding support is a priority with training and equipment closely matched in prioritisation with approximately 10% difference between the two.



Providers charged in a variety of ways in the main they offered a sessional or hourly rate as well as a Daily Rate and half day rates which vary according to whether this is a.m. or p.m.

Time Period	Rate (approx/between)
Hourly	£4 - £5
Sessional Rate (approx 2 ½ hours – 3 hours	£8 - £17
Full day rate	£57 - £65
Short day (9a.m.- 4p.m.)	£45
Morning / a.m.	£30 - £40
Afternoon / p.m.	£26 - £35
70% providers had increased these fees in the past 12 months.	

55% of providers offered some form of discount, either for staff, full time places or siblings. The latter being the most popular (58%) used by providers as a financial incentive.
Providers were also aware of the take up of other financial support their users accessed.



Whilst a higher proportion of parents using full day care also accessed Working Family or Childcare Tax Credits (57%) a marginally lower percentage (49.5%) used childcare vouchers compared to parents using sessional/pre school provision.

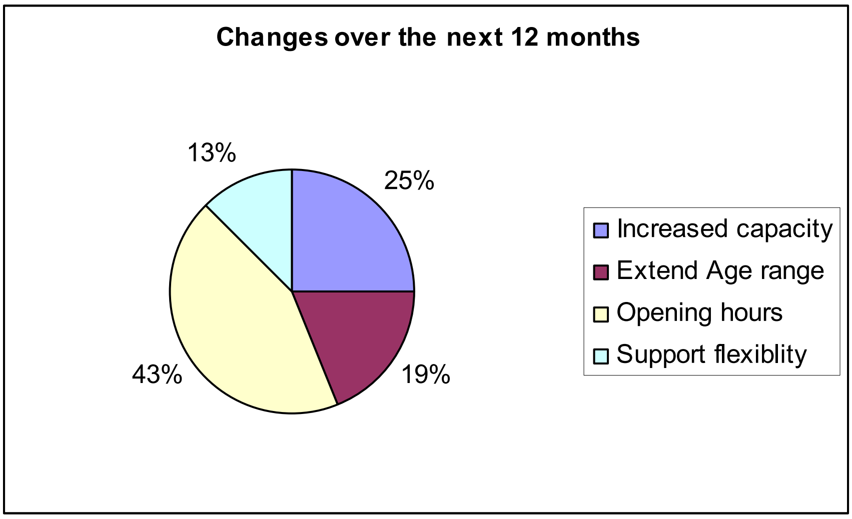
Places offered during the past 12 months
71% of providers reported that the places they offered during the past 12 months had stayed the same, 22% had increased their places with the remaining 7% stating they had reduced the number of places offered.

Places taken up during the same period
26% of providers stated they have seen a reduction in demand with the remaining 74% being evenly split in stating that demand for places have either increased or remained stable.

Anticipating future demand
22% were optimistic that demand for their places will grow with the remaining 63% being marginally split by 3% that places would decrease (33%) or stay the same (30%). The remaining 15% were unsure or didn't know.

Reasons given for fluctuations and changes were as follows:-

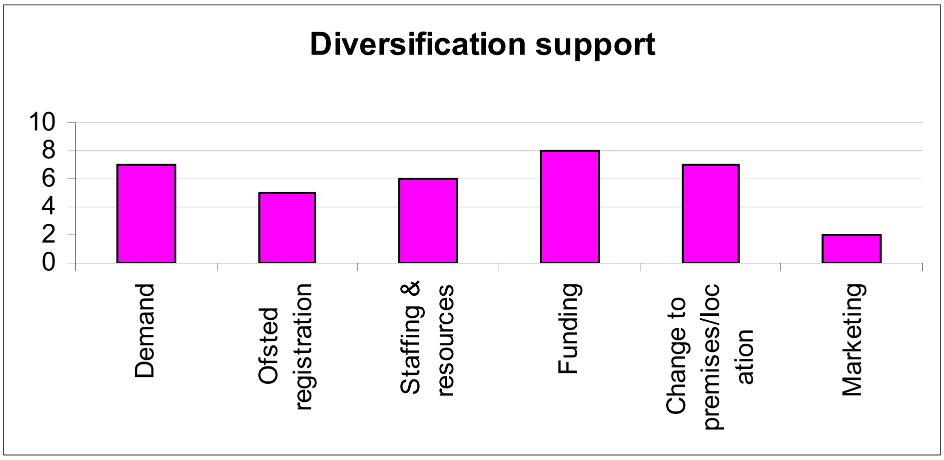
Less children in village/area
Large groups of children leaving for school and it takes us longer to fill the places;
Single point of entry/ change to admissions/intakes
New housing development; increased birth rates; parents returning to work earlier after maternity leave
Migration/ changing settings
Economy – less money in families; recession
Less Funding/ increased costs
Unfavourable PR
Less taking additional hours. School intake earlier
More referrals – increased places for 2 year olds
Economy, less money in families and school admission changes
More parents are now feeling the need for early intervention. I get children as young as two years old to start sessions with us.
We will not know until we see the exact impact of single entry into school
Word of mouth – good PR – the positive impact of new leadership leading to increased local confidence and more users.
Decision to lower starting age from 2.5 to 2 years as there are few other settings offering places 2 year olds



59% of providers anticipate making some changes during the next 12 months to the way in which they operate. The reasons for this are:-

Lunch club/early drop off/ late pick up to meet needs of parents
To support flexibility and to offer more variety for parents
Flexibility of free entitlement offer
To meet demand/future sustainability
Housing developments/community change

In order to do this they will be considering support elements in the following areas:-

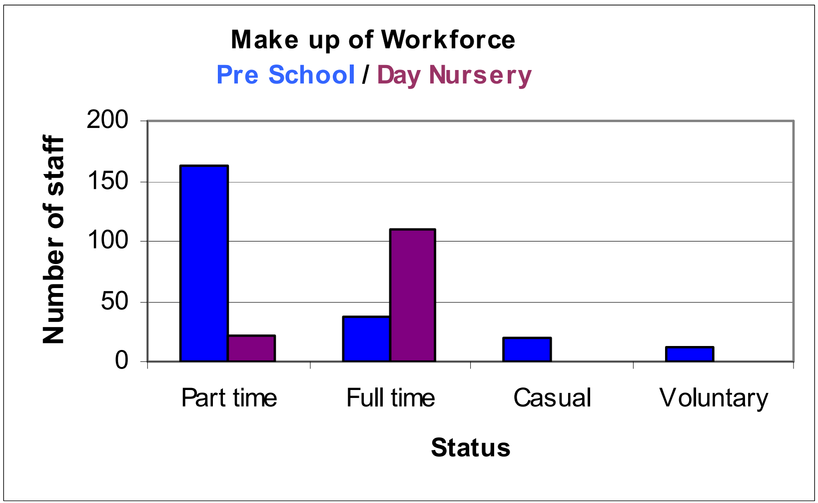


Sustainability issues
Providers were asked to identify if they had any sustainability issues

Not at present, changes as a result of SFF and single point of entry may affect current practice.
Costs, despite raising prices and paying staff a very low wage and securing a rent reduction we are struggling to break even. In a setting such as ours some sustainability issues are the norm rather than the exception
Experiencing a large number of new enquiries and visits and we hope that this will lead to the sustainability issues being lessened
Consequences of single funding formula and change of intake into reception for 2011; Unsure how single point of entry will affect us in the long term.

Single point of entry, low numbers in September/ loss of 4 year olds
The funding amount per child is not enough to make the school sustainable and is in unrealistic reflection of childcare costs.
We are concerned that the number of the children in the area seems to be decreasing

Workforce



Collectively the 27 setting had a workforce of 362 people who work directly with the children. Full time employees account for 41% of this workforce, 78% of which are employed in a full day care setting. Part time employees accounted for 51% of the workforce with the majority (88%) employed in a pre school environment. The remaining 8% were made up of casual and voluntary staff. The latter does not include voluntary committee members as the question related to those working directly with children.

Qualifications and Training

Whilst 83% of the workforces of those responding are qualified, however some providers feel there are issues relating to both staff training and qualifications. Comments are as follows:-

Staff costs and time for training cause issues; should be free as funding (free entitlement) is low. Future funding of training will be an issue
Large numbers of staff requiring same training results in bringing in external training
Difficulties in recruiting qualified staff at level 3 – two supervisor changes over the past two years
Difficulties in recruiting to Deputy level positions – only 2 applicants, one of 1 of whom was qualified
Encourage volunteers to gain qualifications; recently offered all staff NVQ training to all unqualified staff and only 1 declined;
Not all wish to do a level 3;
Future funding of training will be an issue. I member currently studying for foundation degree and 1 just completed EYPS – depends on continuation of grant support/subsidies/bursaries