Dún Laoghaire-Rathdown County Childcare Committee

Childcare Mapping Exercise 2009
SUMMARY FINDINGS REPORT

Research and Report by Unique Perspectives, Research Consultants.
Maps by Cunnane, Stratton & Reynolds.

Background

The Dun Laoghaire Rathdown County Childcare Committee (DLRCCC) is one of 33 County Childcare Committees throughout the country. In 2006, DLRCCC conducted research to map childcare provision which highlighted some gaps and needs in the county. The current document summarises the findings of a similar mapping exercise undertaken in 2009.

The brief for this research is to gather information from relevant existing data and to identify the current situation in childcare provision (2009 data). The objectives of the research include:

- A comprehensive stock-take of childcare provision in the county – including details of numbers of places, locations, types of services offered, age range catered for, etc.
- An analysis of the unmet needs in the county which may be geographical and/or by service type or age group.

The methodology chosen to achieve the research objectives is a mixed method approach. This utilised survey data, literature and documentary review, statistical profiling, and qualitative interviews. During the course of the research childcare providers and parents were given the opportunity to identify key issues regarding the future development of childcare in the Dún Laoghaire Rathdown area. Likewise, members of the DLRCCC and other stakeholders were consulted regarding their experiences and perceptions. In addition, the research drew on the findings of previous research among local employers. The research process took place over a number of months in 2009 with field research conducted between April and September 2009.

In order to respond to the research brief and the objectives, this summary report is structured around the following themes:

- Stock-take of childcare provision in the county (page 3)
- Current gaps in childcare provision in terms of geographical areas, services types and target groups (page 23)
- Changes since 2006 Mapping Exercise (page 24)
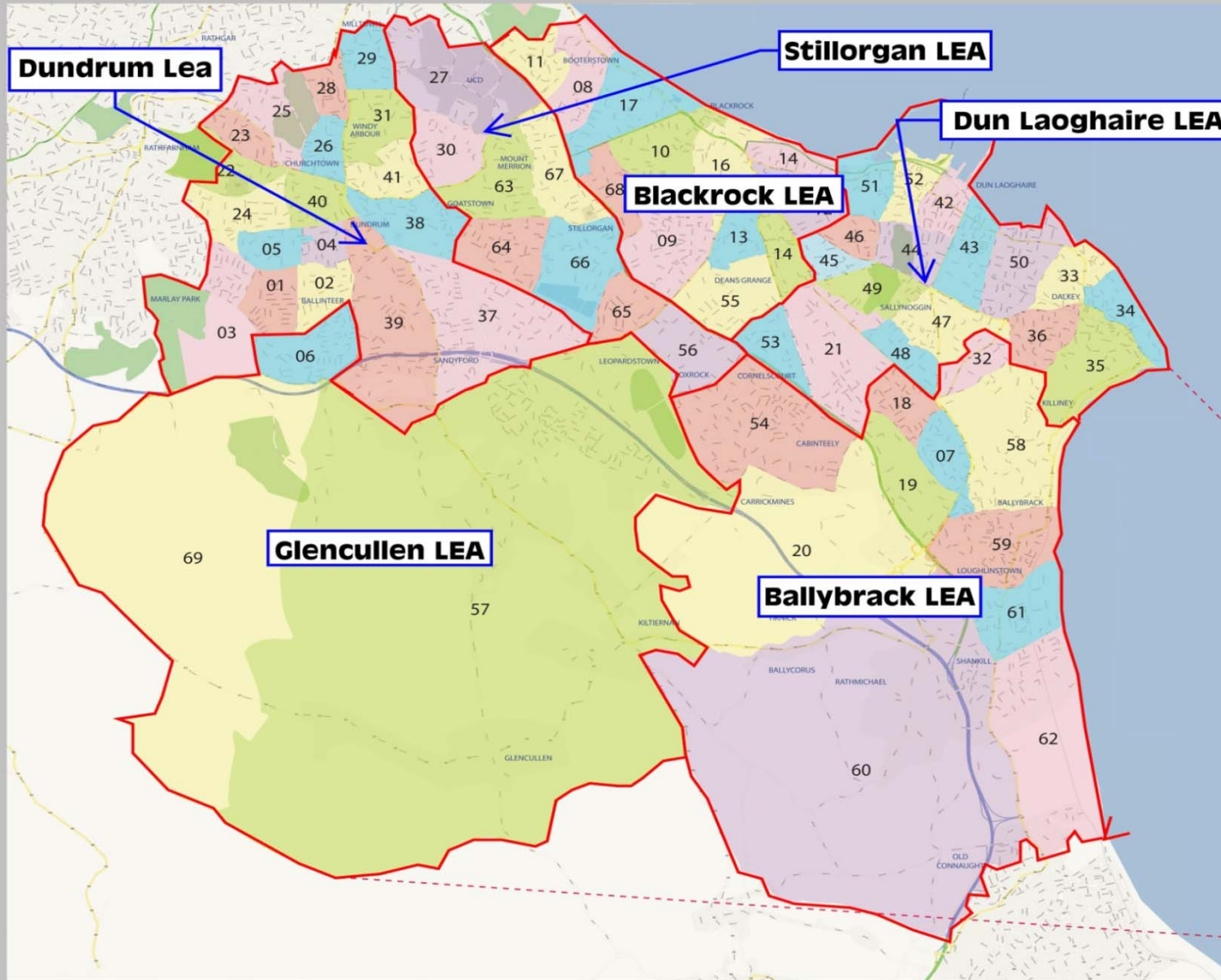- An analysis of the unmet needs in the county and recommendations (page 26)

Before looking at the findings and their analysis, it is worthwhile noting the map below which illustrates the six Local Electoral Areas (LEAs) in Dun Laoghaire Rathdown.[1] In addition, at the relevant sections of this summary findings report GIS maps are presented which portray aspects of the findings.

Finally, as this section is a summary of more detailed research report, where additional or more in-depth information is required, the main report should be consulted.
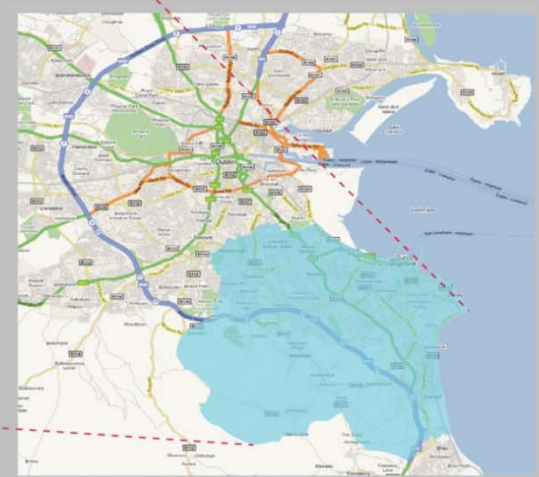
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[1] It is worth noting the important differences between Local Electoral Area (LEA) and Electoral Division (ED). EDs are the smallest geographical area for which statistical data is available. There are 69 in Dun Laoghaire Rathdown. A number of EDs collectively comprise a LEA. The LEAs are the electoral constituencies for the election of Councillors to the Local Authority. There are six LEAs in Dun Laoghaire Rathdown, namely: Ballybrack; Blackrock; Dundrum; Dun Laoghaire; Glencullen; and, Stillorgan.

ELECTORAL DIVISIONS: DUN LAOGHAIRE - RATHDOWN

Dundrum Lea

Stillorgan LEA

Dun Laoghaire LEA

Blackrock LEA

Glencullen LEA

Ballybrack LEA

01 Ballinteer-Broadford
02 Ballinteer-Ludford
03 Ballinteer-Marley
04 Ballinteer-Meadowbroads
05 Ballinteer-Meadowmount
06 Ballinteer-Woodpark
07 Ballybrack
08 Blackrock-Booterstown
09 Blackrock-Carysfort
10 Blackrock-Central
11 Blackrock-Glenomena
12 Blackrock-Monkstown
13 Blackrock-Newpark
14 Blackrock-Seapoint
15 Blackrock-Stradbrook
16 Blackrock-Templehill
17 Blackrock-Williamstown
18 Cabinteely-Granitefield
19 Cabinteely-Kilbogget
20 Cabinteely-Loughlinstown
21 Cabinteely-Pottery
22 Churchtown-Castle
23 Churchtown-Landscape
24 Churchtown-Nutgrove
25 Churchtown-Orwell
26 Churchtown-Woodlawn
27 Clonskeagh-Belfield
28 Clonskeagh-Farranboley
29 Clonskeagh-Milltown
30 Clonskeagh-Roebuck
31 Clonskeagh-Windy Arbour
32 Dalkey-Avondale
33 Dalkey-Bullock
34 Dalkey-Coliemore
35 Dalkey Hill

36 Dalkey-Upper
37 Dundrum-Balally
38 Dundrum-Kilmacud
39 Dundrum-Sandyford
40 Dundrum-Sweetmount
41 Dundrum-Taney
42 Dun Laoghaire-East Central
43 Dun Laoghaire-Glasthule
44 Dun Laoghaire-Glenageary
45 Dun Laoghaire-Monkstown Farm
46 Dun Laoghaire-Mount Town
47 Dun Laoghaire-Sallynogin East
48 Dun Laoghaire-Sallynogin South
49 Dun Laoghaire-Sallynogin West
50 Dun Laoghaire-Sandycove
51 Dun Laoghaire-Salthill
52 Dun Laoghaire-West Central
53 Foxrock-Beechpark
54 Foxrock-Carrickmines
55 Foxrock-Deans Grange
56 Foxrock-Torquay
57 Glencullen
58 Killiney-North
59 Killiney-South
60 Shankill-Rathmichael
61 Shankill-Rathsallagh
62 Shankill-Shanganagh
63 Stillorgan-Deerpark
64 Stillorgan-Kilmacud
65 Stillorgan-Leopardstown
66 Stillorgan-Merville
67 Stillorgan-Mount Merrion
68 Stillorgan-Priory
69 Tibradden

A stock-take of childcare provision in the county

A representative sample of childcare providers including childminders was included to inform the research. 162 providers responded to the survey from a validated provider population of 215 in the county which equates to a response rate of 75%.

Whereas the main report provides a full account of the survey findings, the following outlines some of the key findings in respect of the questions addressed.

Description of Services
Private childcare services accounted for just over two thirds, 67.3%, of those participating in the mapping exercise. The next largest group were childminders, accounting for 14.8% of the respondents. One in ten (10.5%) of the responses were from community-based childcare facilities. A further 7.4% of the sample classified themselves as 'not for profit'. As the response to the survey was significant, the sample provides a good indicator of the make-up of childcare provision in the county. However, only those known to be active childminders on the DLRCCC childminder database were included in the research sample and there is likely to be a higher number childminders operating in the county. Also, while the proportion of community providers might appear to be limited, the responses actually cover the majority of providers in this sector.

The breakdown of facilities responding to the survey is outlined above on the GIS map below.
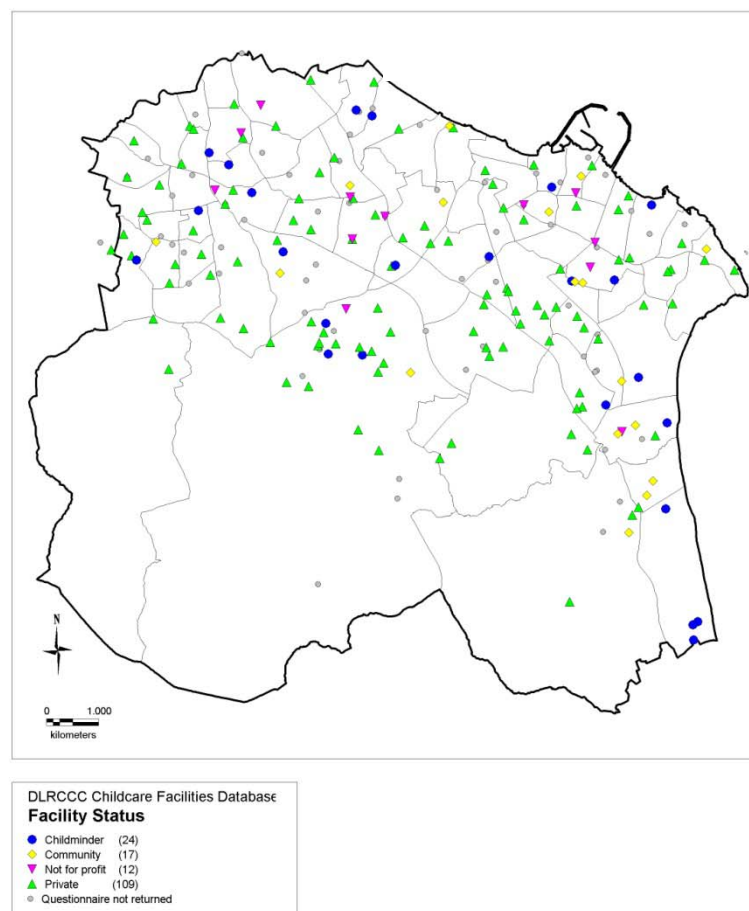
Figure 1: Facilities Status

DLRCCC Childcare Facilities Database
Facility Status
- Childminder (24)
- Community (17)
- Not for profit (12)
- Private (109)
- Questionnaire not returned

Table 1: Service Type by Area

Local Electoral Area (LEA)	Description	Frequency	% (n=162)
Ballybrack	Childminder	6	**20%**
	Community	7	**23.3%**
	Not for profit	1	**3.3%**
	Private	16	**53.3%**
Blackrock	Childminder	2	**15.4%**
	Community	2	**15.4%**
	Not for profit	0	**0%**
	Private	9	**69.2%**
Dun Laoghaire	Childminder	6	**14.3%**
	Community	5	**11.9%**
	Not for profit	4	**9.5%**
	Private	27	**64.3%**
Dundrum	Childminder	6	**15.8%**
	Community	2	**5.4%**
	Not for profit	2	**5.4%**
	Private	27	**73%**
Glencullen	Childminder	3	**15.8%**
	Community	1	**5.3%**
	Not for profit	0	**0%**
	Private	15	**78.9%**
Stillorgan	Childminder	1	**4.8%**
	Community	0	**0%**
	Not for profit	5	**23.8%**
	Private	15	**71.4%**

As noted in table 1 above, Ballybrack LEA is the area with the highest proportion of community facilities, at 23.3% of its childcare services. This reflects the fact that the area is recognised as being less affluent relative to the county. It is followed by Blackrock with 15.4% (but with a lower base) of its services being community based, and Dun Laoghaire with 12%. Community provision accounts for 5.4% in Dundrum and for 4% in Glencullen. There is no community provision in Stillorgan as per the responses to this research. Conversely, Stillorgan, Glencullen and Dundrum reveal private provision comprising over 70% of services. The corresponding proportion for private provision in Blackrock is 64% and in Dún Laoghaire 69%. Just over half of provision in Ballybrack (53%) is private, which is lower than the surrounding LEAs. In terms of childminders, the proportions are similar across the areas, around 15-20%, barring Stillorgan in which they total less than one in twenty providers.

Premises
Revealed in table 2 below, 30.2% of childcare providers described their premises as a 'private home', 29% described their facilities as purpose-built, and 19.1% as a 'converted house'. Multi-use community facilities are cited as the premises by 19% of providers. Around one in ten respectively of the providers describes their premises as a 'multi use community facility' or 'school-based'. Less than 2% of premises are described as work based.
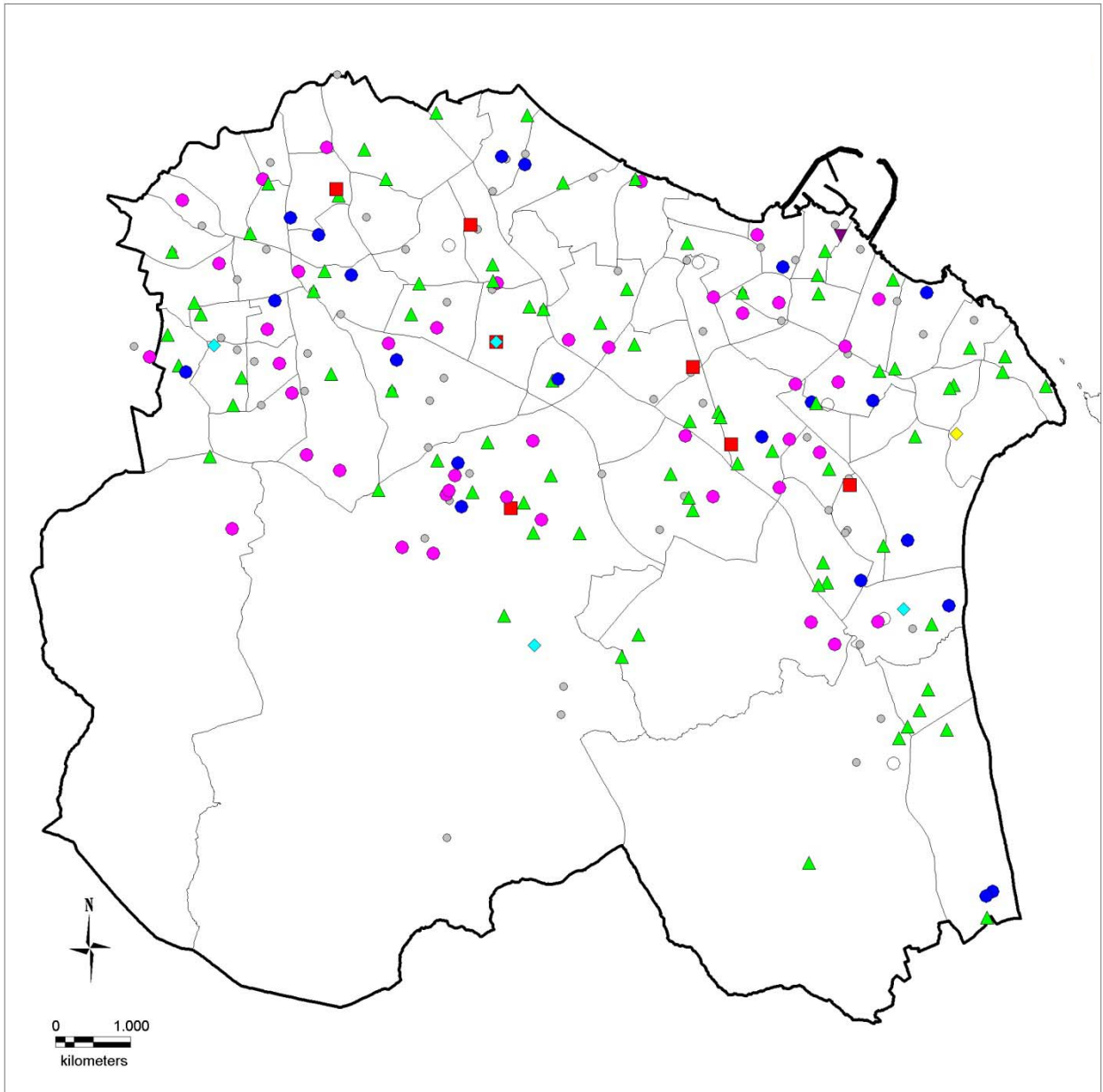
Table 2: Type of Premises utilised by Providers

	Frequency	% 2009	% 2006
Converted House	31	**19.1%**	*45% (house)*
Private Home	49	**30.2%**	*n/a*
Purpose Built Facility	47	**29%**	*34%*
Prefabricated Building	9	**5.6%**	*n/a*
Multi Use Community Facility	15	**9.3%**	*19%*
Work-based	3	**1.9%**	*3%*
School-based	20	**12.3%**	*n/a*
Other	9	**5.6%**	*n/a*

Provider Type
Table 3 below shows that two options – pre school education and crèche - account for three quarters of all provision. Half of the responses classify themselves as pre school education, while 25.9% classify themselves as crèches. One in eight, 12.5%, of the providers describe themselves as childminders. There is limited childcare provision in the workplace and the numbers which are described solely as school age childcare is also small at 4.9%. The following GIS map illustrates the location of the various types of provider.

Figure 2: Service Description

DLRCCC Childcare Facilities Database
Service Description

Symbol	Description	Count
● (blue)	Childminder	(21)
● (magenta)	Creche	(42)
◆ (yellow)	Drop-in	(1)
◆ (cyan)	Naionra	(4)
○	Other	(5)
▲ (green)	Pre-school Education (e.g. play school, play group, Montessori etc.)	(81)
■ (red)	School Age Childcare	(7)
▼ (purple)	Workplace Creche	(1)
● (grey)	Questionnaire not returned	

Table 3: Type of Provider[2]

	Frequency	%
Childminder	21	13%
Crèche	42	25.9%
Drop-in	1	0.6%
Naionra	4	2.5%
Other	5	3.1%
Pre-school Education (e.g. play school, play group, Montessori etc.)	81	50%
School Age Childcare	7	4.3%
Workplace Crèche	1	0.6%
Total	*162*	*100%*

Full/Part time and Sessional Provision

Table 4: Full-time or Part-time or Sessional[3]

	Frequency[4]	% 2009	% 2006
Full time (>5hrs)	61	41.7%	*29%*
Part time (3.5-5hrs)	57	41.3%	*n/a*
Sessional	75	54.3%	*55%*

The majority of providers, 54.3% of services, are sessional-based childcare. 41.7% and 41.3% provide full and part time services respectively. One third provides a mix of full/part time and sessional care. The findings indicate that there are four community childcare facilities in the county that provide full time care, although private providers were more likely to provide full time care at a rate of nearly half of all. Sessional care is provided in higher proportions by community facilities (70.6%) than either not for profit (41.7%) and private providers (43.1%).

The table below details full and part time provision according to whether a service is community, private or not for profit.

Table 5: Full /Part time - Community/Private/Not for Profit

	Community		Not for Profit		Private	
	Freq.	*%*	*Freq.*	*%*	*Freq.*	*%*
Full time (>5hrs)	4	23.5%	2	16.7%	51	46.8%
Part time (3.5-5hrs)	4	23.5%	4	23.5%	33	30.3%
Sessional	12	70.6%	5	41.7%	47	43.1%

Hours of Service

The earliest time a facility opens is 7.00am, accounting for 9% of providers surveyed. Almost 40% (39.6%) of services are open by 8am. The majority of services, 90.8%, are open by 9.00am, including 46.9% opening at 9am. Over 90% of full time services open before, or at, 8am. Part time services are more likely to open at around 9am or from 8.30am as do the majority of sessional providers.

Table 6: Opening Times

	% 2009	% 2006
7.00am- 7.30am	9%	*10%*
7.31am-8.00am	30.6%	*25%*
8.01am-8.30am	4.3%	*8%*
8.31am-9.00am	46.9%	*33%*
9.01am-9.30am	1.9%	*19%*
9.31am-10.00am	1.9%	*2%*
10.01am-11.00am	<1%	*1%*
12.30pm-2.30pm	4.8%	*2%*

The earliest closing time for a sessional facility was 11.00am. In total, 63% of the services close before 5.00pm. However, some four out of ten (37%) of services close after 5pm. 87% of childminders and full time providers close after 5pm, confirming the majority of voluntary notified childminders provide a full time service. 84% of part time services and nearly all sessional services close before 5pm

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[2] This question asked providers to choose one answer only.
[3] Excludes childminders who are treated separately in the tables that follow.
[4] It should be noted that the numbers referred to in this table add up to over 100%. This is due to the fact that a proportion of the surveyed services offer more than one type of service (full time, part time etc.) simultaneously so they can identify in a range of categories.

Capacity and Attendance

Table 7: **Number of Childcare Places**

	Frequency	%	Range	Average
Full time	2066	39.7%	3-167	36
Part time	1193	22.9%	2-58	21
Sessional	1880	36.1%	2-60	20
Childminder	69	1.3%	1-6	3
TOTAL	5208	*100%*	-	-

According to the survey responses, there are 5,208 places provided between respondents. Full time facilities account for the largest number of places (2,066) followed by sessional providers (1,880) and part time facilities (1,193).The smallest providers - childminders working in the home -cater for between one and six children with an average of three. The average provision of places for full time providers is 36, 21 for part time providers and 20 for sessional services.

Among the six LEAs in terms of the number of childcare places available, Dún Laoghaire has the highest number of places with 1,350, Dundrum has 1,189, Stillorgan has 939, Ballybrack 854, Glencullen 531 and Blackrock 345.
Dún Laoghaire LEA accounts for over a quarter of the childcare places according to the survey and Dundrum for over one fifth. The response from Blackrock in terms of places is low; just under 7% of the childcare places in the county.

Table 8: Number of Childcare Places by Area

Area		Frequency	Area Places	% of total	*2006 Mapping places*	*Pop. 0-6 yrs 2006 Census*	*0-6 yrs as % of all DLR 0-6yrs*
Ballybrack	**Full time**	237	**854**	**16.4%**	*987*	*3,704*	*23.4%*
	Part time	210					
	Sessional	378					
	Childminder	29					
Blackrock	**Full time**	123	**345**	**6.6%**	*301*	*2,360*	*14.9%*
	Part time	88					
	Sessional	132					
	Childminder	12					
Dun Laoghaire	**Full time**	589	**1350**	**25.9%**	*1,181*	*2,737*	*17.3%*
	Part time	280					
	Sessional	459					
	Childminder	22					
Dundrum	**Full time**	413	**1189**	**22.8%**	*814*	*3,185*	*20.1%*
	Part time	353					
	Sessional	416					
	Childminder	7					
Glencullen	**Full time**	235	**531**	**10.2%**	*121*	*2,449*	*15.4%*
	Part time	80					
	Sessional	210					
	Childminder	6					
Stillorgan	**Full time**	469	**939**	**18%**	*740*	*1,406*	*8.9%*
	Part time	182					
	Sessional	285					
	Childminder	3					

However, over the three years since the last mapping exercise, there has been a 13% fall in the number of childcare places in Ballybrack. Given the likely future development of parts of this area mooted in the County Development Plan, this would suggest some need for development of childcare capacity.
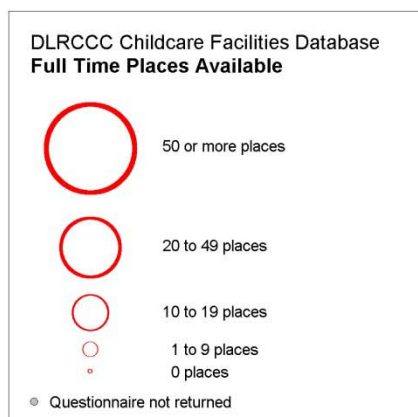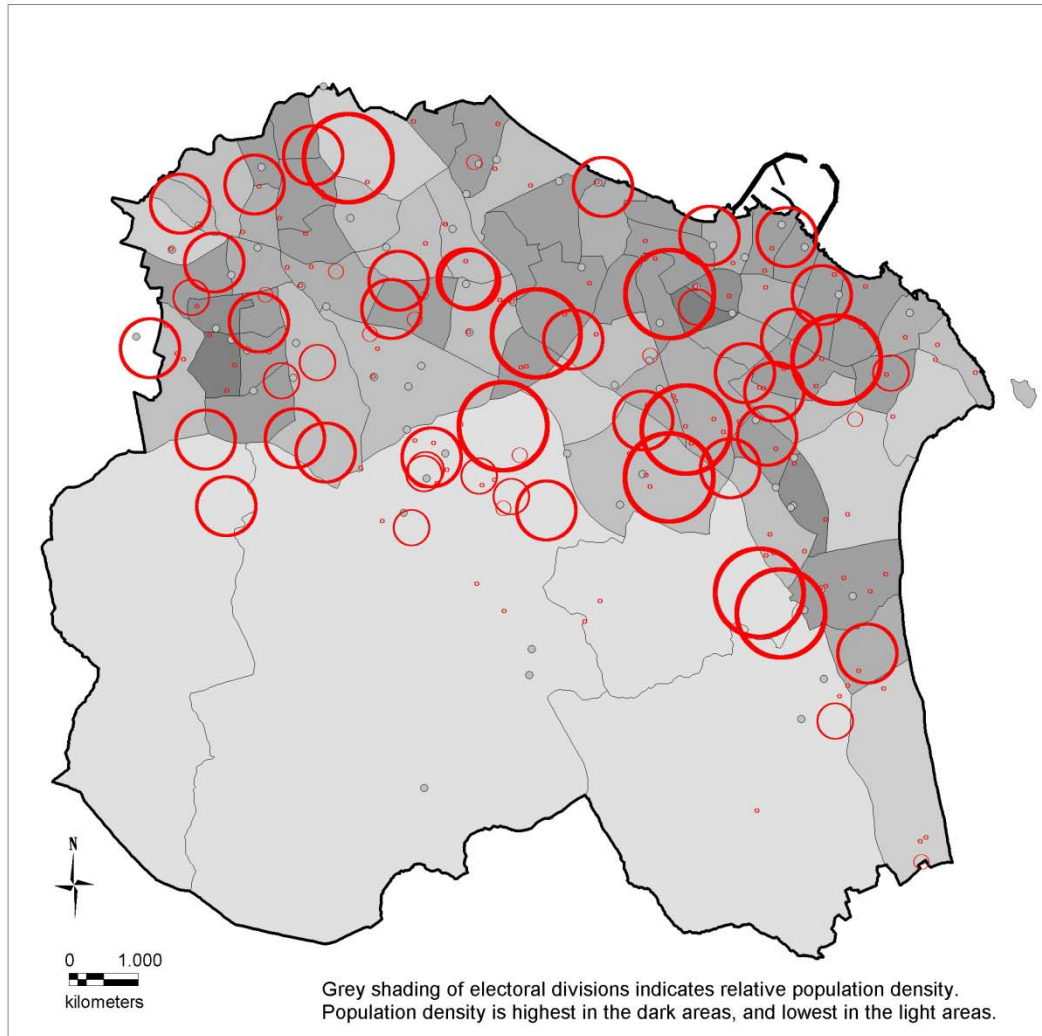
There are no community places in the Stillorgan LEA and limited community provision in Glencullen also. The proportion of community based places is highest in Ballybrack at 162. Ballybrack is also the area with the highest number of not for profit places at 129 and this is followed by Dun Laoghaire (118) and Dundrum (90). The highest numbers of private childcare places, relative to other types of places, are seen in Dun Laoghaire (999), Dundrum (990) and Glencullen (513).

The GIS maps below illustrate this data. The first presents the spread of facilities in the county for all facilities according to whether they have 1 to 9 places, 10 to 19, 20-49, and 50 or over full time places. The following map follows the same logic but in this instance portrays part time places. The following two maps again proceed with the same logic but refer in turn to sessional and childminding places respectively.

In terms of full time places (figure 3), the map seems to suggest that by and large facilities with a higher number of full time places are located near to areas with the highest population densities. There are exceptions noted in the light areas south of the route of the M50 and its junction with the N11. In these cases however, the EDs contain large rural areas which reduce its overall density and where the facilities are located according to the indicator rings, Sandyford and Carrickmines in particular, there are significant populations at the local level or close by.

Figure 3: Full Time Places Available

Grey shading of electoral divisions indicates relative population density.
Population density is highest in the dark areas, and lowest in the light areas.

DLRCCC Childcare Facilities Database
Full Time Places Available

- 50 or more places
- 20 to 49 places
- 10 to 19 places
- 1 to 9 places
- 0 places
- Questionnaire not returned

Below is a map outlining part time places in terms of their location and population density. This again shows that for the most part facilities with the greatest number of part time places are located in or close to areas with high population densities. It is noticeable however that the concentration of high numbers of places (part time) relative to population density is not at the same level as in full time places. There are fewer facilities with 50 or more places. In general, there is more of a clustering of part time places west of the N11 when compared to the corresponding more even east/west split of full time places.

Figure 4: Part Time Places Available

Grey shading of electoral divisions indicates relative population density.
Population density is highest in the dark areas, and lowest in the light areas.

DLRCCC Childcare Facilities Database
Part Time Places Available

- 50 or more places
- 20 to 49 places
- 10 to 19 places
- 1 to 9 places
- 0 places
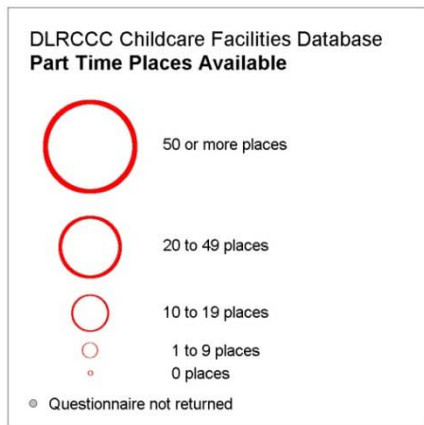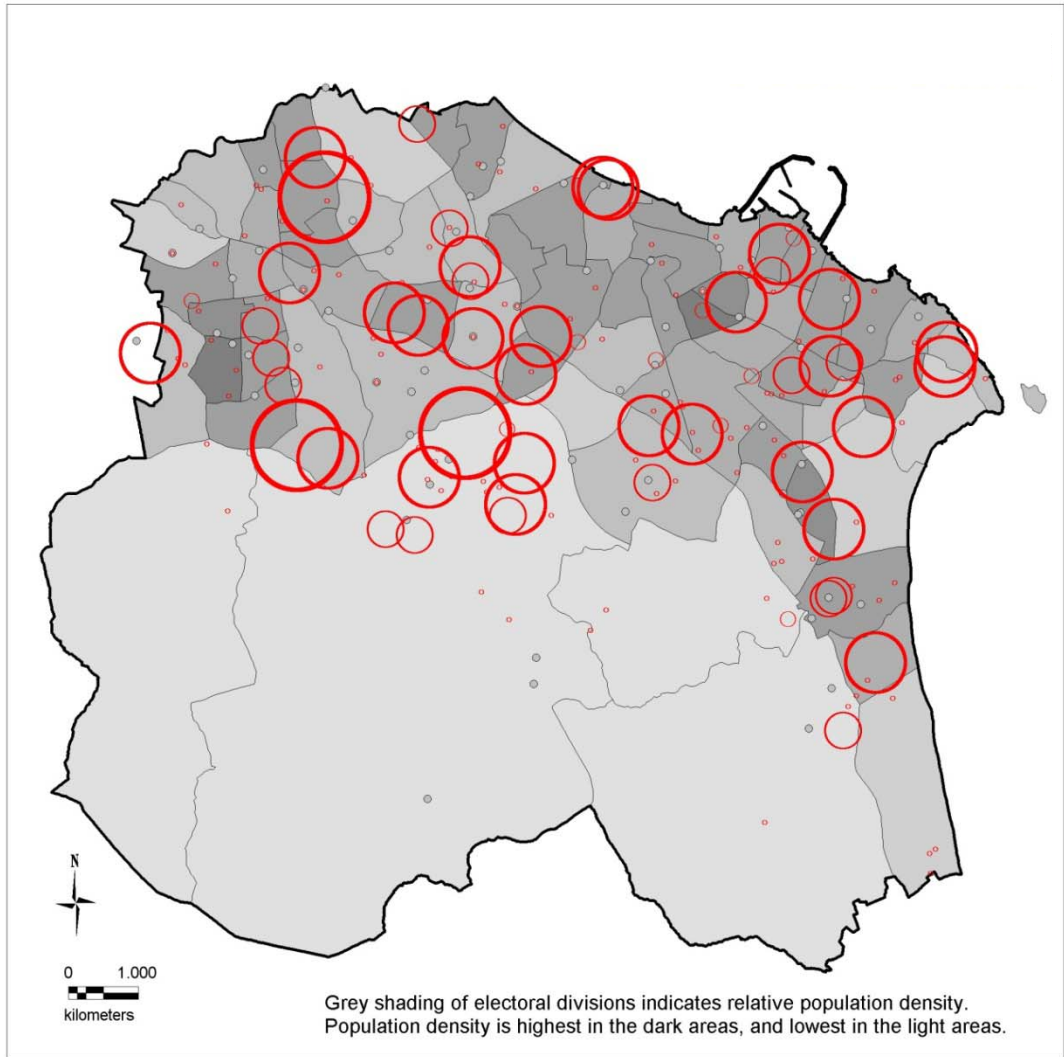- Questionnaire not returned

Figure 5 below illustrates – among all types of childcare places – that the best distribution of places is in sessional services. However, there are few facilities providing more than 50 sessional places, and again there is a concentration in and around densely populated areas. The exception here is in the areas (EDs) in the vicinity of the M50 – near Sandyford - but as noted above, these areas are actually densely populated around the industrial estate and village but become more sparsely populated as the EDs move south toward the Dublin mountains.

Figure 5: Sessional Places Available

Grey shading of electoral divisions indicates relative population density.
Population density is highest in the dark areas, and lowest in the light areas.

DLRCCC Childcare Facilities Database
Sessional Places Available

50 or more places

20 to 49 places

10 to 19 places

1 to 9 places
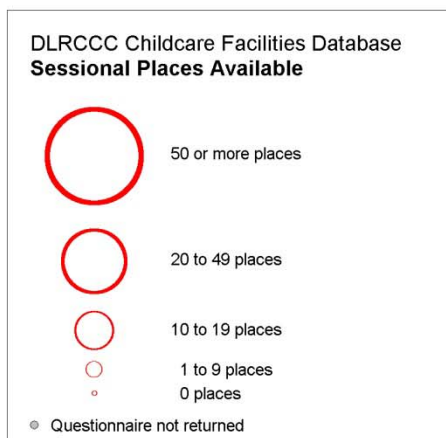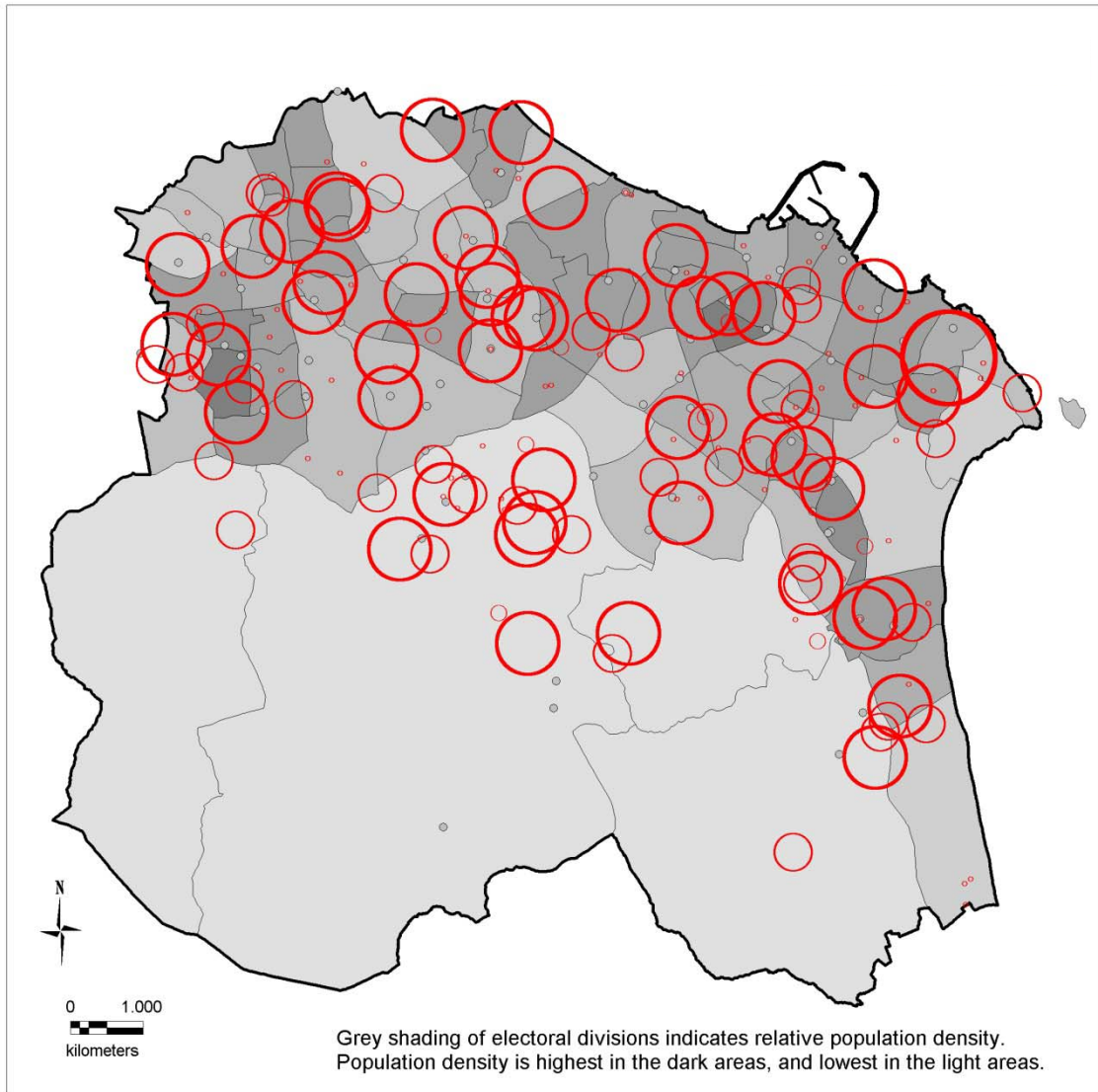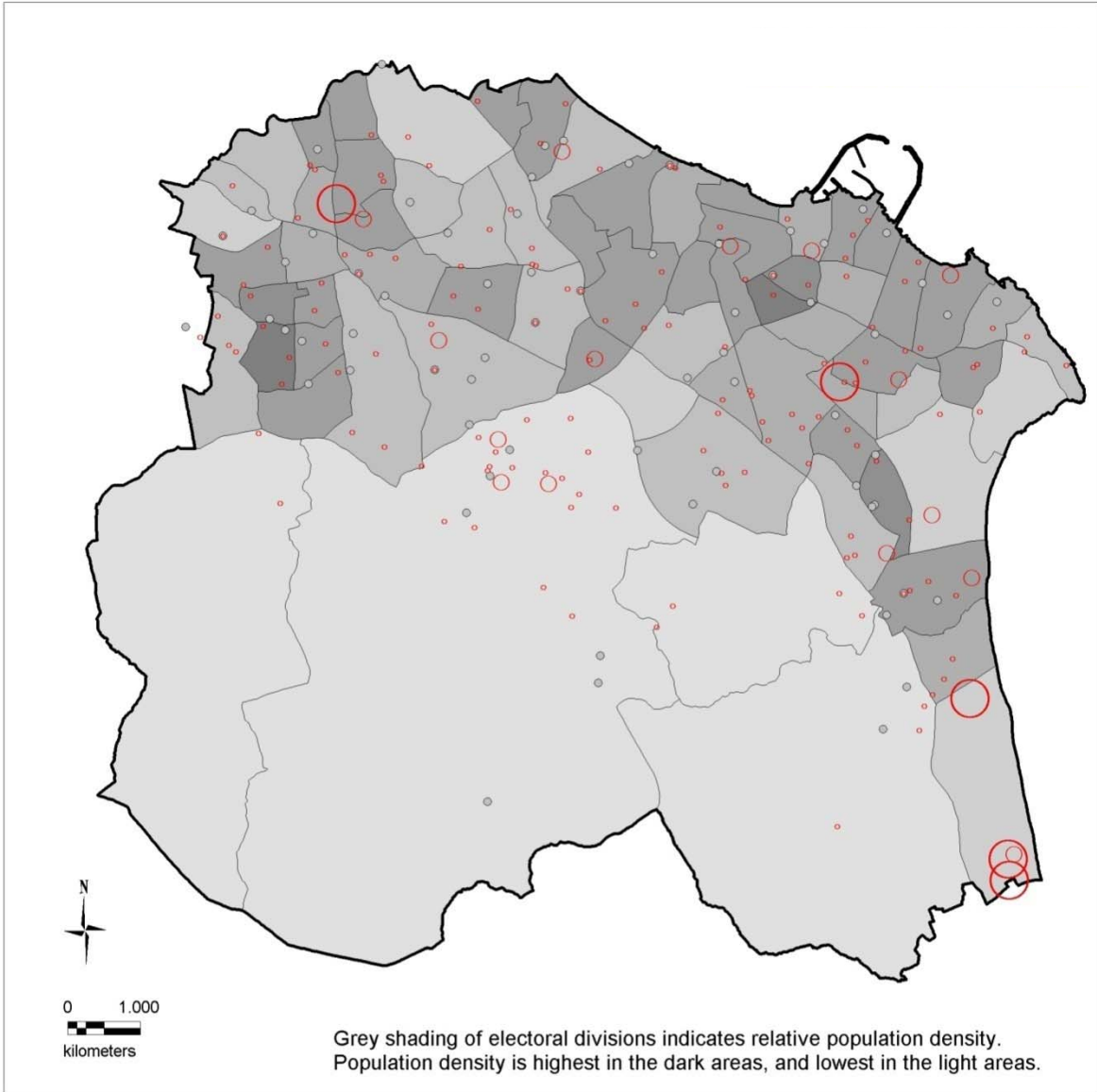
0 places

Questionnaire not returned

Figure 6 below reveals the location of places provided by childminders. It should be noted that technically a facility with more than five places is not officially classified as a childminder.

Figure 6: Childminder Places Available

Grey shading of electoral divisions indicates relative population density.
Population density is highest in the dark areas, and lowest in the light areas.

0   1.000
kilometers

DLRCCC Childcare Facilities Database
Childminder Places Available

⬭ 5 to 9 places
○ 1 to 4 places
∘ 0 places
● Questionnaire not returned

Capacity/Vacancies

Table 9: Capacity amongst Providers

Number of Places for Children (range)	Frequency of Providers with this range of Places[5]	%	Cumulative %	No. of places
1-10	60	26.9%	26.9%	**327**
11-20	84	37.7%	64.6%	**1469**
21-30	29	13%	77.6%	**663**
31-40	32	14.3%	91.9%	**1174**
41-50	8	3.6%	95.5%	**427**
51-100	5	2.2%	97.7%	**356**
101+	5	2.2%	100%	**656**
Total	*223*	*100%*	*-*	***5,072***

Most childcare places are with providers who provide between firstly, 11-20, or, secondly, 1-10 places. Services with twenty or less places make up nearly two thirds of providers (64.6%). The proportion of services with less than forty places is 91.9%. Thus, fewer than 10% of the county's childcare facilities provide over 40 places.

At the time of the survey, 72 respondents did not have any vacancies. This suggests that a slight majority of providers had vacancies but crucially a significant proportion did not.

The table below details some the vacancies across a number of ranges. However, to reiterate, this refers only to the slight majority of services that indicated a vacancy at the time of the survey.

Table 10: Vacancies

Number of Vacancies for Children	Frequency of Service indicating this range of Vacancy	%	No. of vacancies
1-10	81	78.6%	**391**
11-20	15	14.6%	**244**
21-30	2	1.9%	**43**
31-40	1	1%	**36**
41-50	1	1%	**45**
51-100	2	1.9%	**111**
101+	1	1%	**150**
Total	*103*	*100%*	*1,020*

Table 10 reveals that services with a large numbers of vacancies are few. A majority (78.6%) of services reported between 1 and 10 vacancies. The average number of vacancies for those with up to ten is approximately five.

At the time of the survey, summer 2009, the total number of vacancies is over or roughly one fifth of available places in the county. However, this may be partly explained by some of the services with a larger number of vacancies being at the set up stage, or that there may be seasonal factors such as school term time closure.

A valuable addition to this data is its presentation on the GIS maps that follow.

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[5] The figures here are greater than the number of providers responding to the research as it includes some services offer full time, part time, and sessional places.

Figure 7 depicts the percentage vacancy rate among providers of full time places at the time of the survey. This indicates that most providers in this category have less than a 10% vacancy rate. Those with the highest percentage of vacancies are in the minority and are located in areas where there is a cluster of providers.

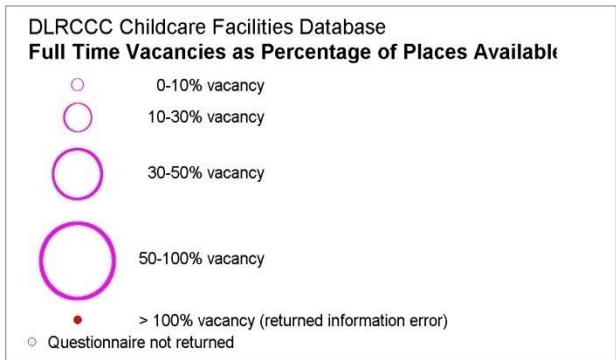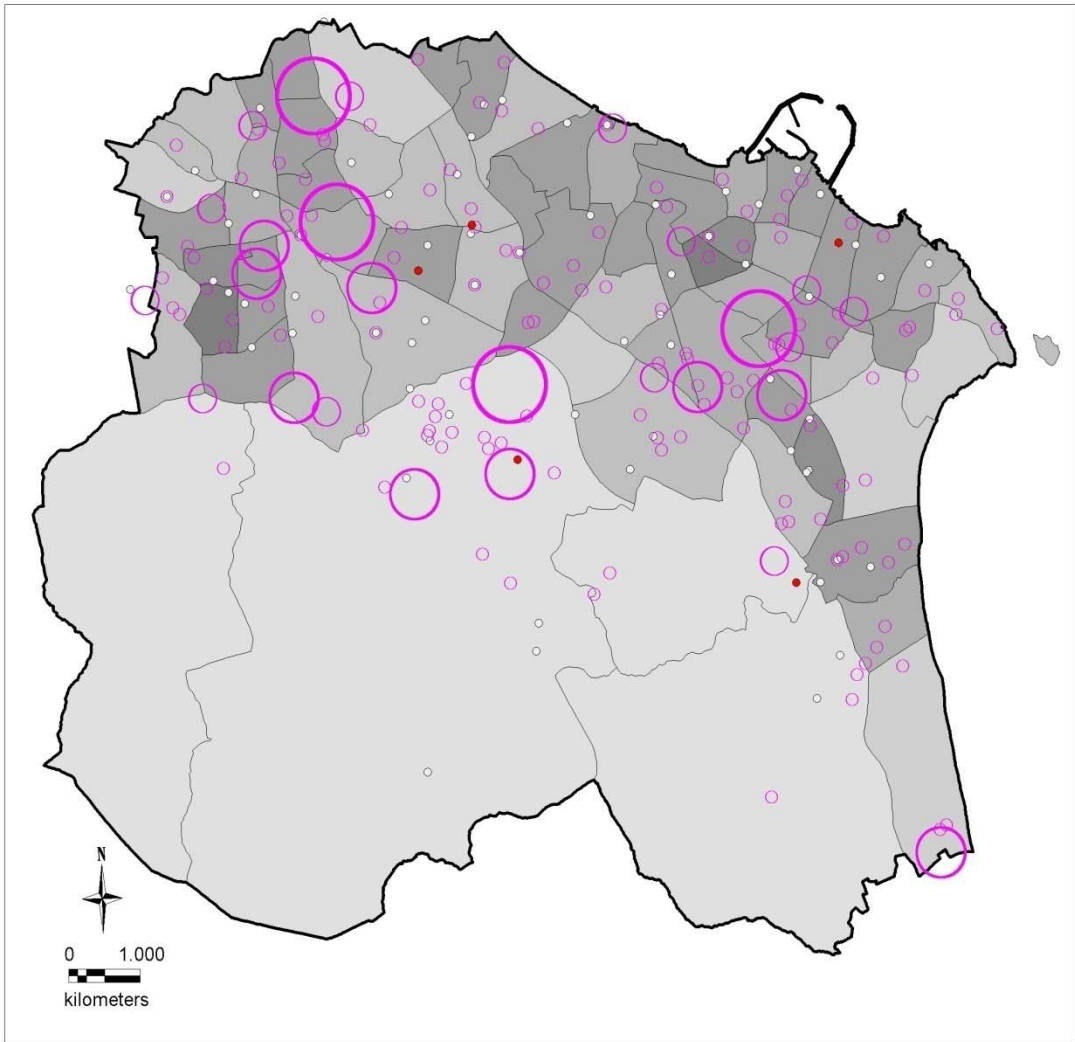**Figure 7: Full Time Vacancies as Percentage of Places Available**

DLRCCC Childcare Facilities Database
Full Time Vacancies as Percentage of Places Available

- 0-10% vacancy
- 10-30% vacancy
- 30-50% vacancy
- 50-100% vacancy
- > 100% vacancy (returned information error)
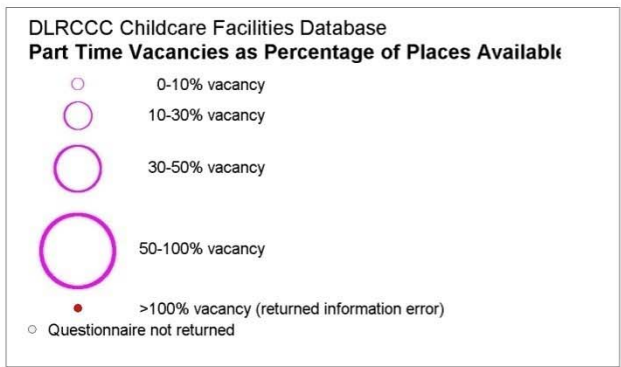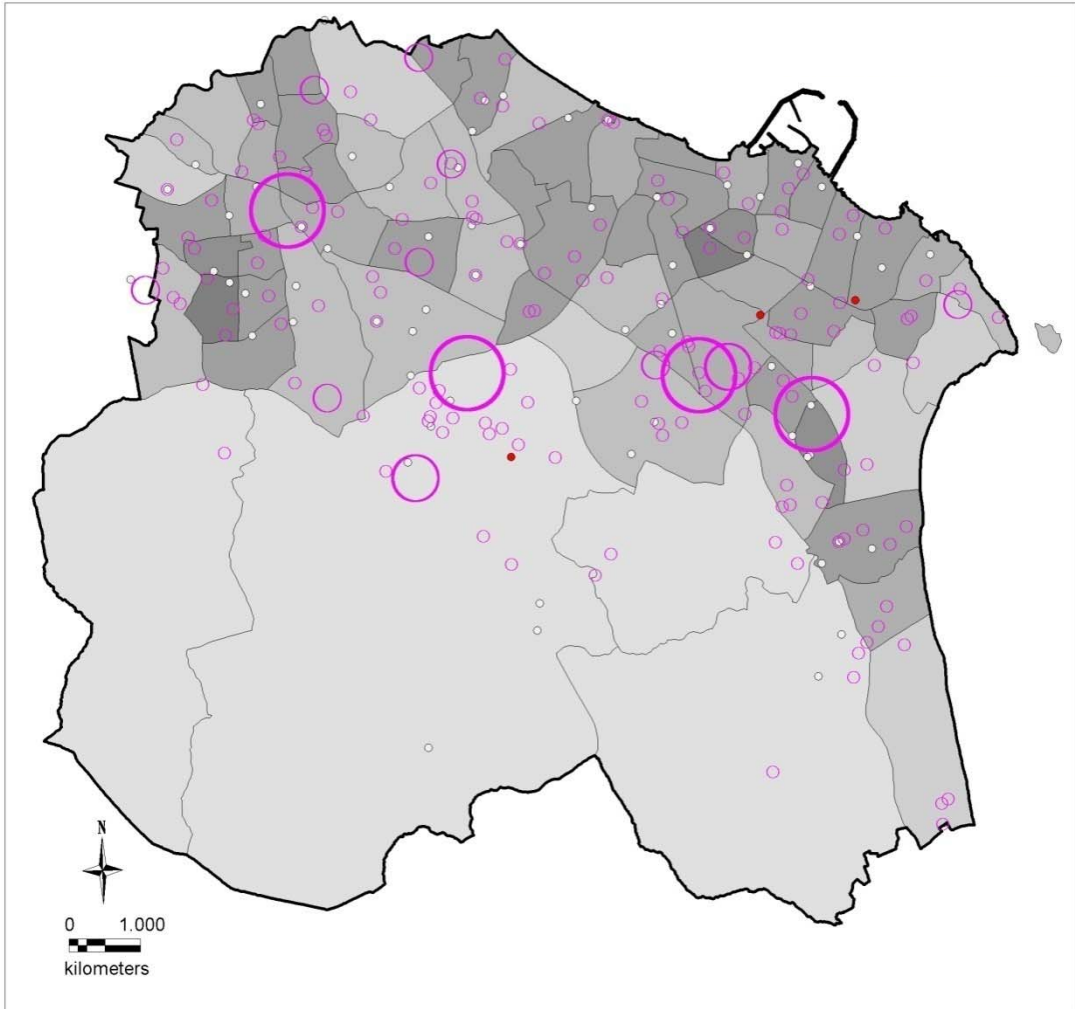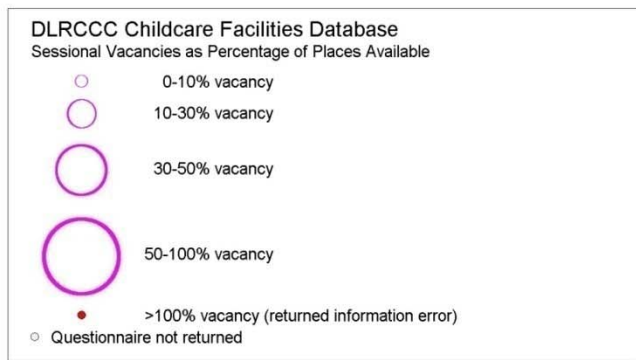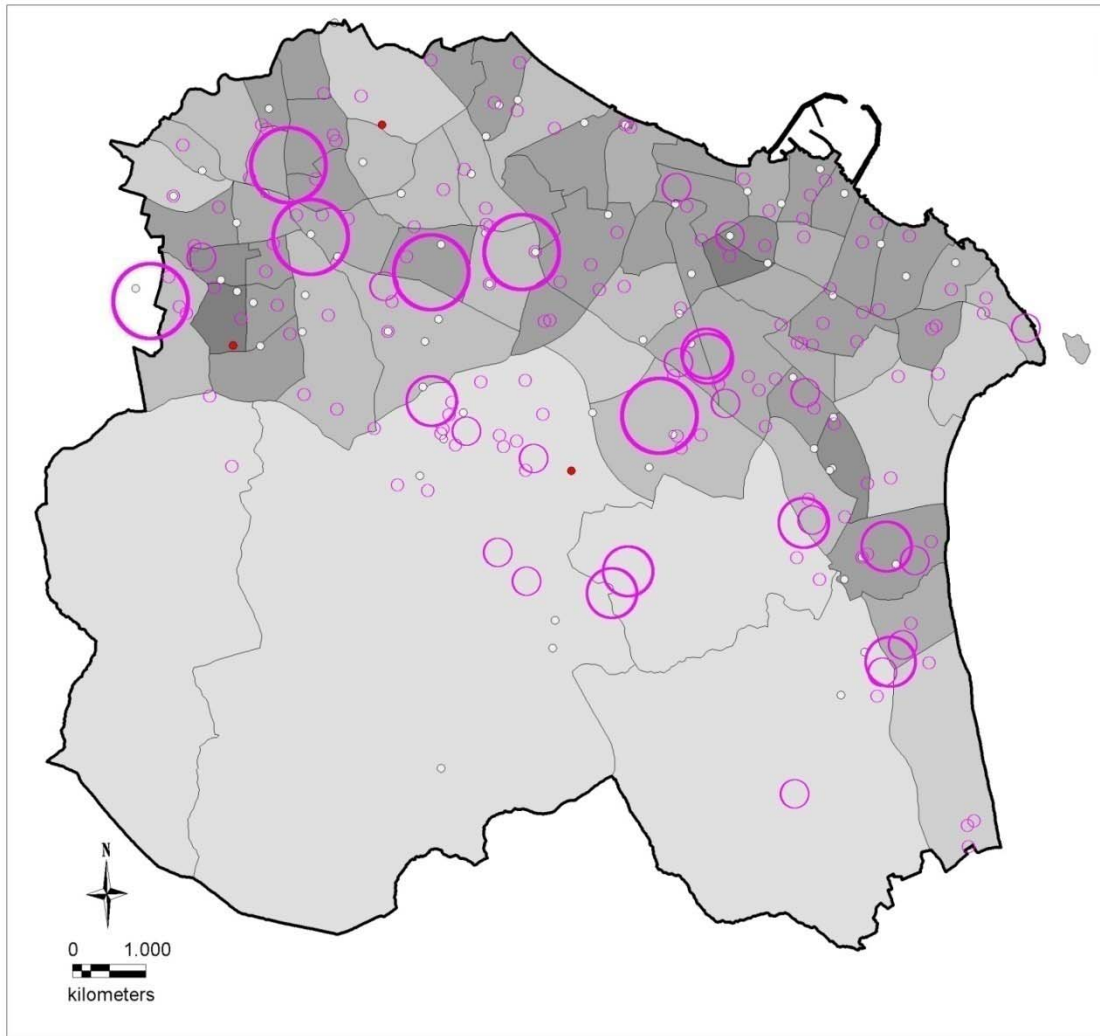- Questionnaire not returned

Figure 8 below illustrates the vacancy rate in respect of providers of part time places. This again shows that most vacancies are below the 10% level. Where vacancies rise as a percentage of places, they are generally in those facilities which have a higher number of places as indicated in earlier maps.

Figure 8: Part Time Vacancies as Percentage of Places Available

DLRCCC Childcare Facilities Database
Part Time Vacancies as Percentage of Places Available

○   0-10% vacancy

○   10-30% vacancy

○   30-50% vacancy

○   50-100% vacancy

●   >100% vacancy (returned information error)
○ Questionnaire not returned

The map below, figure 9, presents the vacancy rate of sessional place as a percentage of places available. On this map, it is noticeable that there are generally more providers reporting a higher percentage of vacancies. This differs from the trend evident in the previous maps in respect of full and part time places. However, these may be sessional providers who tend to follow school terms, close in the summer months and may impact on how they reported their vacancies.
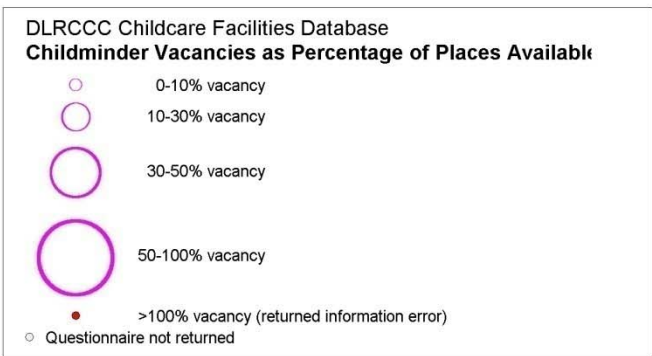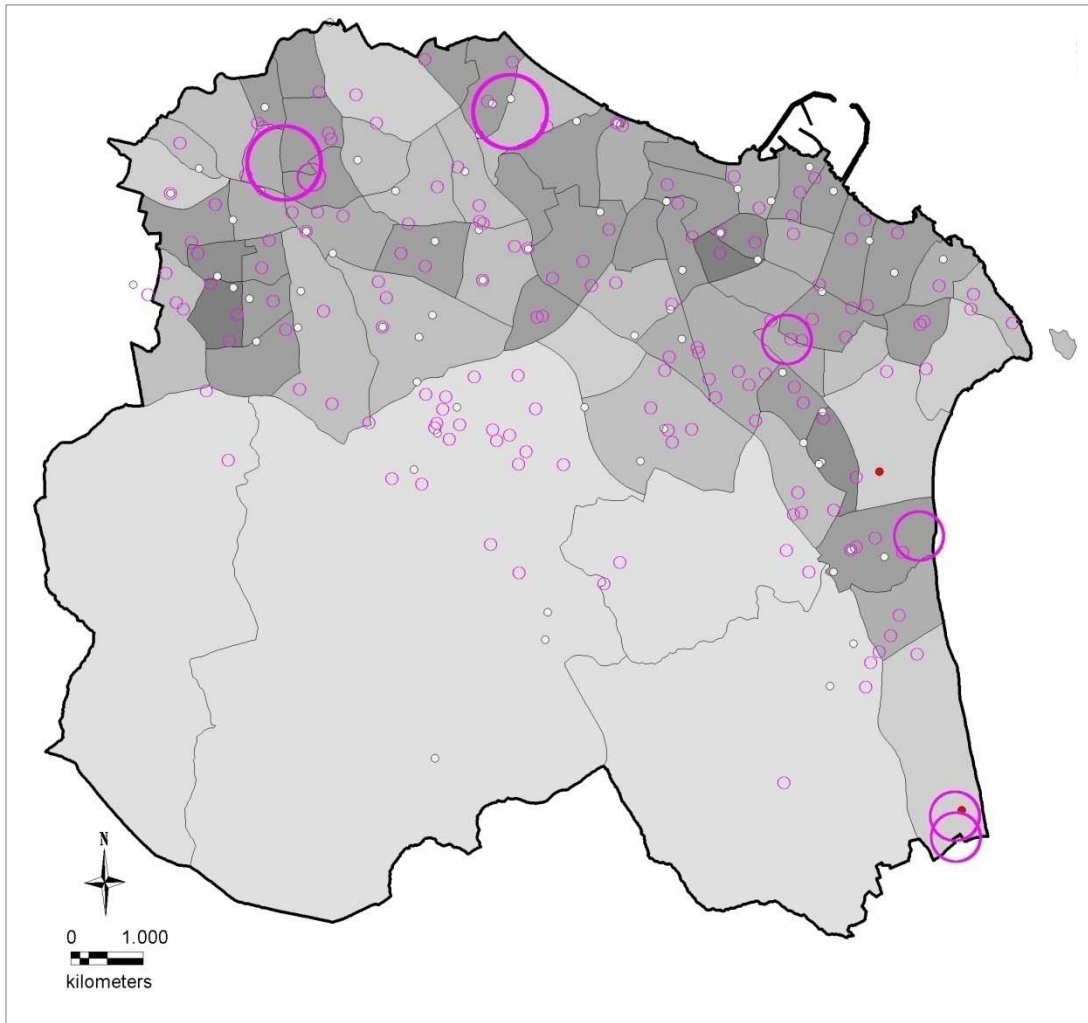
Figure 9: Sessional Vacancies as Percentage of Places Available

Finally in respect of vacancies, figure 10 below presents the vacancy rate among those childminders who participated in the research. This indicates that only a small number of childminders have significant vacancies.

Figure 10: Childminder Vacancies as Percentage of Places Available

Children Attending

The average attendance across the providers taking part in the survey is 27 children. This suggests that on an average day 4,500 children attend the 162 providers surveyed here. 92.5% of providers cater for the 4-6 age band. This is followed by nearly 70% in the case of the 1-3 age band. The proportions catering for children under one year and over six (school age childcare) are just under a third respectively, 31.9%.

Table 11: Age of Children

	< 1 year	1-3 years	4-6 years	6+ years
% 2009	31.9%	69.4%	92.5%	31.9%
No.	51	111	148	51
Total Responses		N=160		
% 2006	*31%*	*74%*	*89%*	*26%*
No.	*45*	*108*	*131*	*39*

Childminders would seem to cater for a wider range of children in age terms and this is probably a function of the nature of childminding in terms of flexibility and so forth.

Table 12: Age provision and service status

	< 1 year	1-3 years	4-6 years	6+ years
Childminder	33.3%	66.7%	62.5%	45.8%
Community	6.9%	52.9%	94.1%	23.5%
Not for Profit	25%	75%	100%	33.3%
Private	35.8%	70.6%	96.3%	29.4%
Overall	*31.9%*	*69.4%*	*92.5%*	*31.9%*

Community providers generally do not cater for under ones. They are more likely to deliver services for those in the four to six age band (94.1%) and - in about half of cases - to those in 1-3 age band. The private sector exhibits higher provision than overall when it comes to under ones, one to threes and four to sixes. There is an obvious in gap in the provision for under ones from the community sector, although this may be due to a lack of expressed need.

Table 13: Age bands catered for by Areas

	< 1 year	1-3 years	4-6 years	6+ years
Ballybrack	20%	66.7%	93.3%	26.2%
Blackrock	30.8%	69.2%	84.6%	15.4%
Dun Laoghaire	33.3%	73.8%	88.1%	33.3%
Dundrum	37.8%	64.9%	94.6%	29.7%
Glencullen	36.8%	78.9%	94.7%	31.6%
Stillorgan	28.6%	57.1%	90.5%	47.6%
Overall	*31.9%*	*69.4%*	*92.5%*	*31.9%*

There is significant diversity in the extent to which each of the age bands are provided for at LEA level. Glencullen and Dundrum record the highest comparative provision for the under ones with over a third, while Ballybrack is the lowest at one fifth of providers. This is a result of the higher concentration of community providers in this area. For the 1-3 years band, provision ranges from 57% in Stillorgan to nearly 79% in Glencullen. There is a relatively high rate of provision for 4-6 year olds in all areas, in which provision is at 85% or over. This is the modal age band for provision. There is a range from 15.4% provision in Blackrock to 47.6% in Stillorgan for the school age childcare age band.

Table 14: Number of age bands catered for by services

	One	Two	Three	Four
%	25.8%	37.1%	18.9%	18.2%

As revealed in table 14, a quarter of services cater for one age band only, from the earlier data this is more than likely the 4-6 band. 37.1% of services cater for two, 18.9 for three bands and 29 services or 18.2% cater for all four age bands.

Waiting Lists

The highest number of providers with waiting lists is seen in the 4-6 age group, followed by the 1-3 category. This is not surprising given that these are the most common age groups catered for. The number of children on waiting lists for baby places and the over sixes is relatively high, given the lower proportion of childcare facilities catering for these age groups.

Table 15: Waiting Lists

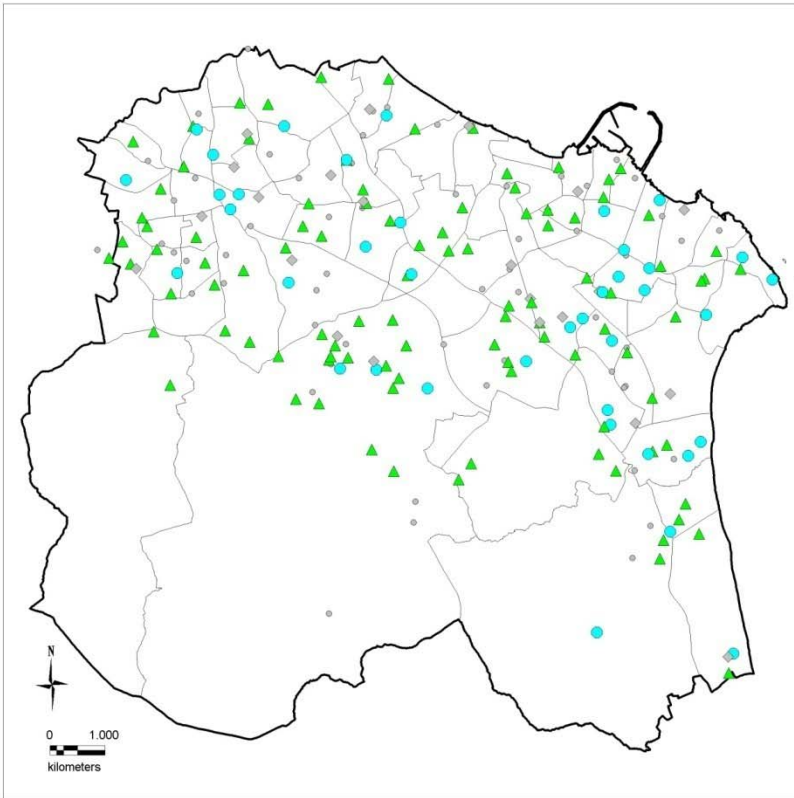|	Number of <u>providers</u> with waiting lists for this age group		Maximum Number of <u>Children</u>, in this age category, on a Waiting List in any facility	
Year:	**2009**	*2006*	**2009**	2006
Under 1	**23**	*33*	**18**	25
1-3	**44**	*62*	**25**	35
4-6	**55**	*66*	**120**	320
6+	**4**	*6*	**10**	18

Flexible Childcare Provision

24% indicated that they provided early morning drop off. 23% provided late pick up. Similarly, 23% of providers surveyed indicated having a collection and/or drop off service. 64% of providers indicated they had flexible fee arrangements.

Curriculum

Table 16: Curriculum Provided

	Formal	Informal	None
%	62.5%	24.4%	13.1%
No.	100	39	21

63% of providers surveyed follow a formal curriculum. About a quarter of providers follow an 'informal' curriculum: and 13.1% of providers in the county (in terms of this survey) do not follow a curriculum. In other words, 37% of services do not follow a formal curriculum (see map – figure 11 - below)

Figure 11

DLRCCC Childcare Facilities Database
Curriculum

▲ Formal (e.g. Highscope, Montessori, Froebel, Steiner etc.)
● Informal
◆ None or no answer
● Questionnaire not returned

Catchment Area

The majority of providers cater for local children, that is, those who reside within three kilometres of the childcare centre. The survey also found that the majority of children attending childcare providers are from Dun Laoghaire Rathdown.

Equality and Diversity

The findings here suggest that children with a physical disability may be somewhat excluded from childcare provision. Apart from this, the proportions indicating capacity to cater for children with specific attributes or needs are encouraging. There is however a higher proportion indicating capacity to cater for children from ethnic minority groupings than the groupings of children such as those with emotional/behavioural difficulties, speech/language difficulties or disabilities. The numbers that are catered for in the disability and with difficulties categories are somewhat limited and this begs a question of practical as opposed to notional capacity. There are however significant numbers attending childcare providers in the county who belong to the ethnic minority and speech/language categories. A good proportion of providers indicate that some staff has undertaken the relevant training around equality and diversity etc. However, a number of providers cater for one form of disability or difficulty (speech, emotional etc.) while having no staff trained to do so. The opposite is also true.

Table 17: Catering for equality & diversity

	% of providers indicating capacity to cater for children from these groups		Numbers of children from these groups currently catered for		% of providers indicating staff with specific training to work with these children	
	2009	*2006*	**2009**	*2006*	**2009**	*2006*
Children with physical disabilities	**44.4%**	*40%*	**13**	*27*	**29%**	*12%*
Children with sensory disabilities (e.g. visual/hearing impairments/speech)	**58%**	*38%*	**46**	*27*	**29.6%**	*5%*
Children with learning/intellectual disabilities	**68.5%**	*67%*	**58**	*119*	**45.7%**	*26%*
Children with behavioural/emotional difficulties	**60.5%**	*-*	**51**	*-*	**38.3%**	*-*
Children from ethnic minority backgrounds	**79%**	*82%*	**134**	*147*	**33.3%**	*32%*
Children with speech/language difficulties	**71.6%**	*-*	**127**	*-*	**43.8%**	*-*

In the full mapping report there are a set of maps which show the location of childcare facilities and whether they cater for one or more of the groupings of children discussed above and also if facilities have staff trained to cater for children who are members of one or more of the groups. These reveal some interesting trends. Firstly, a range of facilities that cater for children with physical disabilities may not have staff trained to do this work. This is in keeping with the 'notional' concept mentioned above whereby facilities may in ideal terms see themselves as being open to cater for such children but may in practice not be in a position to do so. Secondly, a further set of facilities do not cater for physical disability but yet have staff that is trained to do so. Overall, this suggests (and is supported by the small number of children with physical disabilities in attendance at facilities) that providers are unclear either way about their abilities to cater for physical disability based on the limited number of cases in reality. It should be noted also that in respect of ethnic minority groupings, in 2009, the County Childcare Committee completed a piece of research into childcare needs amongst the Traveller community.

Providers' Fees

Table 18: Full time fees

Weekly Fee €	< 1 year %	1 – 3 years %	4-6 years %	6 years + %
<25	2%	6.7%	5.7%	4%
26-50	4%	3.3%	3.8%	-
51-100	-	1.7%	3.8%	12%
101-150	4%	8.3%	11.3%	32%
151-200	8%	11.7%	13.2%	28%
201-250	54%	50%	47.2%	16%
251-300	26%	16.7%	13.2	4%
<300	2%	1.7%	1.9%	4%

The most common weekly fee for full time childcare is in the €201-250 range across the age bands: under ones, 1-3 and 4-6. There are also a significant proportion of providers charging fees for these age groups in the €151-200 and €251-300 ranges respectively. Fees are at their highest levels for under ones.

Table 19: Part time Fees

Weekly Fee €	< 1 year %	1 – 3 years %	4-6 years %	6 years + %
<25	11.5%	2%	3.9%	13%
26-50	-	8.2%	5.9%	-
51-100	-	24.5%	25.5%	13%
101-150	38.5%	38.8%	37.3%	56.5%
151-200	42.3%	24.5%	25.5%	13%
201-250	26%	2%	2%	4.3%
251-300	-	-	-	-
<300	-	-	-	-

The majority of providers' fees for part time childcare are in the ranges of €51-100, €101-150 and €151-200 per week across all four age bands. The proportions of fees are generally at their highest in the €101-150 per week range. Fees are at their highest levels for under ones in terms of part time childcare.

The highest fees for provision at sessional level are concentrated in the 1-3 and 4-6 age bands. However, across all four age bands, fees are concentrated in the €51-100 per week range.

Childcare Staff

Table 20: Childcare Staff

	Full time (> 30 hrs)			Part time (< 30 hrs)		
	Nos. staff	Nos. Providers	Avg. per provider	Nos. staff	Nos. Providers	Avg. per provider
Manager(s) (administration)	43	43	1	30	30	1
Manager(s) (childcare)	64	54	1.2	29	27	1.1
Team/Room Leader(s)	103	36	2.9	36	23	1.6
Childcare Worker(s)	158	46	3.4	171	41	4.1
Montessori Teacher(s)	91	45	2.1	76	46	1.7
Nursery Nurse(s)	57	19	3	9	5	1.8
CE/JI Participants	11			31		
Students	7			38		
Voluntary Childcare Staff	4			14		
Total (excluding CE, students and volunteers)	**516**	-	**2.1**	**351**	-	**2**

According to the survey, there are 2.1 full time staff for each provider. In addition, there are 2 part time staff per provider. This is dependent on the large proportion of providers that are part time or sessional with different age groups in larger providers etc. In terms of full time positions, childcare workers make up the largest proportion of staff followed by team/room leaders. For part time positions, childcare workers are the largest proportion followed by Montessori teachers, which is probably a function of the high number of centres providing part time childcare.

The findings show that at least 60% of staff working in childcare in Dun Laoghaire Rathdown – according to this survey - has a full FETAC level 5 award (considering that a FETAC Level 5 award is a requisite in most cases for a Level 6 Award). The proportion is probably larger in reality. In addition, the findings reveal that, at a minimum, 36% of staff have acquired at least a FETAC Level 5 and a further 24% have acquired a FETAC level 6 award and higher.

Table 21: Matrix of Childcare Provision and Needs

Local Electoral Area	Total No. on Validated Database per area (excl. childminders)	Responses Received (including childminders)	Responses received per ED incl. Childminders	Responses Received (excludes childminders)	Population 0-6, 2006.	Area Places (places per pop)[6]	Type of Place		% of Providers by Service Type[7] *(responding to survey)*		EDs identified as a location of need for Childcare based on population of children	EDs identified as a location of need for Childcare based on population families with children 0-6-14 yrs	EDs identified as associated with social exclusion	Areas likely to see residential development post 2010
Ballybrack	36	30	Ballybrack (2) Cabinteely-Granitefield (3) Cabinteely-Kilbogget (5) Cabinteely-Loughlinstown (3) Dalkey-Avondale (-) Foxrock-Carrickmines (1) Killiney North (3) Killiney South (4) Shankill-Rathmichael (2) Shankill-Rathsallagh (3) Shankill-Shanganagh(6)	24	3,704	854 (4.4)	Full time	237	Childminder	20%	Shankill-Rathmichael Killiney-South Shankill-Rathsallagh Shankill-Shanganagh Cabinteely-Kilbogget Cabinteely-Loughlinstown	Shankill-Rathmichael Ballybrack Cabinteely-Kilbogget Cabinteely-Loughlinstown Killiney-North Killiney-South Shankill-Rathsallagh Shankill-Shanganagh	Shankill-Rathsallagh Killiney-South	Cherrywood/Rathmichael Bray/Old Conna Woodbrook/Shanganagh
							Part time	210	Community	23%				
							Sessional	378	Not for	3%				
							Childminder	29	Private	53%				
Blackrock	16	13	Blackrock-Booterstown (2) Blackrock-Carysfort (5) Blackrock-Central (-) Blackrock-Glenomena (1) Blackrock-Newpark (-) Blackrock-Seapoint (-) Blackrock-Templehill (2) Blackrock-Williamstown (-) Foxrock-Deans Grange (1) Stillorgan-Priory (-) Blackrock-Monkstown (-) Blackrock-Stradbrook (2)	11	2,360	345 (6.8)	Full time	123	Childminder	15%	Blackrock-Carysfort Blackrock-Glenomena Blackrock-Booterstown Blackrock-Central Foxrock-Deansgrange	Blackrock-Carysfort Blackrock-Central Blackrock-Glenomena Blackrock-Williamstown	-	
							Part time	88	Community	15%				
							Sessional	132	Not for	0%				
							Childminder	12	Private	70%				
Dundrum	44	37	Ballinteer-Broadford (5) Ballinteer-Ludford (1) Ballinteer-Marley (3) Ballinteer-Meadowbroad (2) Ballinteer-Meadowmount (2) Churchtown-Castle (-) Churchtown-Landscape (1) Churchtown-Nutgrove (2) Churchtown-Orwell (2) Churchtown-Woodlawn (-) Clonskeagh-Farranboley (2) Clonskeagh-Milltown (-) Clonskeagh-Windy Arbour (1) Dundrum-Balally (4) Dundrum-Kilmacud (5) Dundrum-Sandyford (5) Dundrum-Sweetmount (-) Dundrum-Taney (3)	31	3,185	1189 (2.7)	Full time	589	Childminder	16%	Churchtown-Castle Clonskeagh-Milltown Dundrum-Balally Dundrum-Kilmacud Dundrum-Sandyford Dundrum-Sweetmount	Ballinteer-Broadford Dundrum-Ballaly Dundrum-Kilmacud Dundrum-Sandyford Clonskeagh-Milltown Churchtown-Nutgrove	Ballinteer-Meadowmount Churchtown-Castle Churchtown-Nutgrove Clonskeagh-Farranboley	
							Part time	280	Community	5%				
							Sessional	459	Not for	5%				
							Childminder	22	Private	73%				
Dún Laoghaire	36	42	Cabinteely-Pottery (10) Dalkey-Bullock (1) Dalkey-Coliemore (3) Dalkey Hill (1) Dalkey Upper (2) Dún Laoghaire-East Central (-) Dún Laoghaire-Glasthule (2) Dún Laoghaire-Glenageary (1) Dún Laoghaire-Monkstown Farm (1) Dún Laoghaire-Mount Town (1) Dún Laoghaire-Sallynoggin East (7) Dún Laoghaire-Sallynoggin	36	2737	1350 (2)	Full time	413	Childminder	14%	Dun Laoghaire-Sandycove Cabinteely-Pottery Dun Laoghaire-Mount Town	Cabinteely-Pottery Dun Laoghaire-East Central Dun Laoghaire-Sallynoggin East Dun Laoghaire-Salthill Dun Laoghaire-Sandycove	Dun Laoghaire-Mount Town Dun Laoghaire-Monkstown Farm Dun Laoghaire-Sallynoggin East Dun Laoghaire-Sallynoggin South Dun Laoghaire-West Central	
							Part time	353	Community	12%				
							Sessional	416	Not for	10%				

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[6] This is a crude calculation given that not all providers responded. It does however allow for a sense of provision per head of population, 0-6. It also does not take account of afterschool services or indeed full time part time etc. In that sense, it is only a signpost of a likely trend.

[7] The total percentage here may add up to only 99% due to rounding of percentages from the main report.

			South (-) Dún Laoghaire-Sallynoggin West (1) Dún Laoghaire-Sandycove (2) Dún Laoghaire-Salthill (3) Dún Laoghaire-West Central (4) Foxrock-Beechpark (1)				Childminder	7	Private	64%			
Glencullen	27	19	Ballinteer-Woodpark (2) Glencullen (15) Tibradden (1)	16[8]	2,449	531 (4.6)	Full time	235	Childminder	16%	**Ballinteer-Woodpark Glencullen**	**Glencullen Ballinteer-Woodpark Tibradden**	-	**Kiltiernan/Glenamuck-**
							Part time	80	Community	5%			
							Sessional	210	Not for	0%			
							Childminder	6	Private	79%			
Stillorgan	22	21	Clonskeagh-Belfield (2) Clonskeagh-Roebuck (2) Foxrock-Torquay (4) Stillorgan-Deerpark (3) Stillorgan-Kilmacud (1) Stillorgan-Leopardstown (3) Stillorgan-Merville (4) Stillorgan-Mount Merrion (3)	20	1406	939 (1.5)	Full time	469	Childminder	5%	**Stillorgan-Priory Stillorgan-Merville**	-	-	-
							Part time	182	Community	0%			
							Sessional	285	Not for	24%			
							Childminder	3	Private	71%			

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[8] One facility has been ascribed to the Glencullen LEA but not to individual ED as the survey only outlined a broad address and postal code rather than the name and full address of the facility.

Current gaps in childcare provision in terms of geographical areas, services types and target groups

As part of its demographic profiling (matrix table above), the research identified a number of electoral divisions (EDs) with higher than average proportions of those in the 0-14 and 0-6 age cohorts. In addition, those EDs were also identified which exhibit significant numbers of families with children aged 0-14 or with a high relative number of couples with families. In the table above, these are shown beside the relevant ED and also 1. responses to the survey, 2. current provision in terms of places and 3. other important indicators drawn out of the research. The table above therefore puts a range of findings together and collectively leads to a number of additional findings.

Across all of the LEAs, the greatest childcare need (in terms of places, its population, the proportion of children in the childcare age, parents with children under 14, together with potential development) would appear to be in Ballybrack. It is worthwhile summarising some of the issues in respect of the needs in the Ballybrack LEA (as opposed to Ballybrack at the local level) as it features prominently in the report's analysis. Some of issues highlighting Ballybrack LEA as an area of particular need are as follows:
- In the Ballybrack LEA, there was a reduction in childcare places, previous mapping survey to current mapping survey, from 987 in 2006 to 854 in 2009: 13.5% fall in childcare places since 2006
- There is less provision for under ones (at 20% of providers compared to a county average of 31.9%)
- EDs in the Ballybrack LEA make up half of the EDs with higher than the county average of proportion of their population in the 0-14 age band
- The proportion of Ballybrack LEA's population comprised of 0-6 year olds (9%) is higher than the county average[9]. Of the 15 EDs with population proportions of six year olds and under greater than the county average, six are located in the Ballybrack LEA
- Six of the 12 EDs with the highest proportion of at least one child aged under 15 are located in the Ballybrack LEA
- There was an above county average increase in the number of couples in this LEA from 2002 to 2006
- The current County Development Plan provides for significant development in Cherrywood, Shanganagh, Rathmichael and Old Conna, all of which are located in the Ballybrack LEA. In Cherrywood, the plan envisages a population increase of 35,000 and in Shanganagh an increase of over 6,000[10]
- The consultations with stakeholders identified this LEA also as an area of need

This can be said therefore to be the priority area in terms of future provision, given the context of the present research. This area is also relatively underprovided for in respect of full time places. It is worth noting that this area is also the location of some of the more disadvantaged EDs in the county. Thus a focus on social inclusion within private providers would appear to be a need. This relates in the main to affordability. The area is currently served better than other in terms of community provision, however, elsewhere in the research it was shown that full time day care is not provided to the same extent by the community sector as private providers.

Blackrock would similarly seem to require additional provision. Although this area is not cited for extensive future residential development, contrasting with Ballybrack, its age profile suggests a need that is greater than the current level of provision.

The LEA of Glencullen also reveals a lower number of places relative to its population of children. It is also home to a significant relative proportion of families with all children in the 0-14 age cohort. Finally, this area is also likely to see – economic circumstances permitting – residential development over the course of the next six years thus increasing the likely need for childcare provision.

Given the current level of places per head, Stillorgan, Dundrum and Dun Laoghaire suggest a lower, relatively speaking, level of need than the previous three LEAs. However, in the case of Dundrum and Stillorgan there would appear to be a need for more affordable and community provision, as both areas are not as well served as some of the others in terms of that type of services. The evidence from the Matrix table above also suggests that Dundrum LEA in particular is comparatively underserved by community provision but has a number of EDs which are the location of comparative social exclusion.

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[9] Glencullen LEA has the highest proportion at 12.9%, but the numbers this proportion represents is considerably smaller than other LEAs.
[10] Shanganagh is zoned for an additional 2,300 residential units, based on the plan's notion of 2.8 persons per unit, this total an additional 6,440 persons.

It is worth noting that the research shows that most of those that use childcare tend to choose facilities that are close to their home. This suggests that a premium ought to be put on the location of childcare facilities within walking distance of major developments, with consideration of proximity to transport nodes also.

Changes in gaps since the completion of the last Mapping Exercise in 2006

A number of distinct comparisons were made in the text between the findings in the 2006 and 2009 mapping exercises.

Firstly, the 2006 mapping exercise was not able to fully explore Census 2006 as only the preliminary population findings were available. The full gamut of Census data became available in late 2007 and then over the course of 2008. There were therefore a number of differences between the two mapping exercises, 2006 and 2009. The present research was able to gather more data from the Census than the 2006 mapping process. Key data included that on the structure of population with reference in particular to children and families.

This revealed that Dun Laoghaire Rathdown is one of the most densely populated counties in the country. In 2006 for instance, there were 1,540 persons per kilometre. This represented an increase in population density of 2% from 2002. 18.2% of the population were aged 0 to 14 in 2006, representing 35,244 children. Therein, there were 15,841 children aged 0 to 6 years. This latter group represented 8.2% of the county's 2006 population.

The 2006 census indicates there were 18,703 families with at least one child under the age of 15. The census indicates that although there was a decrease of 5.9% in the number of families with children under 15 during the decade 1996-2006, this masked a 3.4% increase in families with children under 15 and a 0.5% decrease in the total number of families with children between 2002 and 2006.

The survey indicates that private childcare services account for just over two thirds, 67.3%, of those participating in the mapping exercise; 14.8% are childminders, 10.5% are community based childcare facilities and 7.4% are not for profit. In general, the make up of services (responding) is in keeping with that, barring childminders, seen in the 2006 mapping.

In terms of premises, it is difficult to compare 2006 and 2009 given some modifications and extensions to the range of possible choices. Nevertheless, the 45% who suggested 'house' as their premises in 2006 is similar to the nearly 50% who indicate their premises in 2009 as a 'converted house' or 'private home'. 34% indicated a purpose built facility as their type of premises in 2006; the responses in 2009 put this figure at 29%, again relatively similar proportions.

There was little difference in the proportion of sessional services between 2006 and 2009, where in 2009 55% described themselves as sessional and 41/42% as either full time or part time respectively. There was a significant increase in the proportion of full time services being provided in the county in 2009 when compared to 2006.

Regarding places, the two major differences in breakdown of places by LEA between 2006 and 2009 are in Ballybrack (16% in 2009 and 24% in 2006) and Glencullen (10% in 2009 and 3% in 2006). The difference in respect of Glencullen could be explained by the lower response rate from this area in 2006 which skewed the research. However, there would appear to be a reduction in the number of places in Ballybrack in 2009 when compared to 2006, (854 to 987). Overall perhaps due to the higher response rate, the total number of places available in 2009 was greater - at 5,208 - than was seen in 2006 at 4,144.

The proportions and the spread of children (across the less than one, one to three, four to six and six plus age ranges) in 2009 were similar to that seen in 2006. This suggests an established trend of provision. The main differences relate to an increase in the numbers of childcare facilities providing for over sixes, that is a school age cohort.

The numbers on waiting lists identified in the current mapping exercise are less across all four age bands than seen in 2006. This may suggest that provision is responding to demand, although it must also be stated that demand may be decreasing due to the economic circumstances of families.

In comparison to the 2006 mapping process, the main trends in opening hours remain that the highest proportion of providers open in the pre 8am and 9am time ranges. The main contrast over the three year period between mapping exercises is the increase from 76% to nearly 91% of providers opening between 7am and 9am.

Both the 2009 and 2006 mapping exercises examined issues around equality and diversity. In terms of capacity to cater for children with physical, sensory, and learning/intellectual disabilities, the proportions of providers indicating capacity for these groups was higher in all cases tham in 2006. The proportion of providers indicating a capacity to cater for children from ethnic minorities was generally similar between 2006 and 2009. The numbers of children from the different groups was in most cases less in 2009 than 2006. However, this was mitigated by the addition of children with, one, behavioural/emotional difficulties and, two, speech/language difficulties in the 2009 survey questionnaire. There were 429 children in 2009 and 320 in 2006 across all the group categories of children in terms of equality and diversity attending the surveyed providers. Finally, in this context the research also explored the proportion of providers indicating staff who have specific training to work with children from the above groupings. In nearly all cases, the proportion of providers with staff trained was significantly greater in 2009 than 2006. In terms of equality and diversity, the responses from 2009 were more positive and showed progress on those cited in 2006.

The following table indicates the gaps identified for each of the LEAs in 2006 and how these compare with findings of the 2009 Mapping process. The numbers set out in the 2009 column relate to their counterparts in the 2006 column.

Table 22: Changes in gaps, 2006 to 2009 mapping

LEA	Gaps Identified in 2006 Mapping	Gaps Identified in 2009 Mapping
Ballybrack	1. Pockets of disadvantage requiring high support interventions. 2. Need for additional full-time places, particularly in the community sector. 3. Need for the development of after school provision. 4. Monitoring required regarding new developments in the Cherrywood area.	1. Given the concentration of disadvantage in the area, this need still exists 2. This area is the second best served by community providers of all the LEAs (behind Dun Laoghaire); however there is little full day care provision proportionately in this area and this may be a function of the concentration of community providers on sessional care. 3. School age childcare is a need across all LEAs and increasingly so. 4. This need remains as the area is zoned again in the new Development Plan and substantial development is mooted.
Blackrock	1. Additional affordable childcare places required across all age groups. 2. Need to explore the role of nannies and childminders in this area, in order to develop a clear picture of the current demand.	1. Unfortunately, the issue of affordability is a prominent finding of the 2009 research. In this respect, the gap exists, but it is not unique to Blackrock. However, it is a wider pressing issue. There is under provision in general childcare places in the area. There are however no significantly disadvantaged EDs in the Blackrock area (although there are smaller social housing areas). 2. This issue was not apparent in the present research.
Dundrum	1. Further community facilities required. 2. Additional full time places needed for all age groups, as well as school aged provision. 3. On-going development in the Sandyford area will necessitate consideration of childcare. Given the level of commercial development, it is necessary to link with employers exploring their potential role in the development of childcare facilities. 4. The low response rate in this area also indicates a need for more development work on the part of the County Childcare Committee.	1. The present research recorded a low level of community places in Dundrum and this therefore remains a need. 2. School age childcare is a need across all LEAs 3. This gap remains and there is a significant gap in the employment based childcare. The reasons are many, as noted in the relevant chapter of the full research report. The solution requires a level of engagement at local as well as regional, national levels. 4. The response rate for this area was similar to three of the other LEAs at around 70% which was an improvement by 15 pps on 2006. The response rate here could be higher to bring it in line with Dun Laoghaire and Stillorgan on the east side of the county.
Dún Laoghaire	1. Need for additional places (full-time and sessional), particularly in the community sector. 2. Need for the development of after school provision. 3. More high support intervention required for disadvantaged target groups housed in this area.	1. There remains a need for full time places in the community sector in this and other areas. The area is relatively well served in terms of sessional places in 2009. 2. School age childcare remains a need across all LEAs. 3. This area is the location of significant disadvantage, as such there remains a need in the area for early intervention/family support type approach to childcare provision.
Glencullen	1. The development of this area will require a focus on increasing childcare provision – this should be appropriate to the types of units being development, in terms of scale, and should be affordable for families moving into the area. 2. The low response rate in this area also indicates a need for more development work on the part of the County Childcare Committee.	1. This area will continue to develop over the course of the next few years, economic environment permitting. However, there is a need to ensure existing services are maximised and new services are located so as to enhance their feasibility. The issue of affordability is key and developments are required across all services to increase affordability. There is a need for community provision in this area. 2. The response rate for this area improved dramatically from 2006 to 2009. This probably reflects the development of the centres over the period and the greater interaction with the CCC.
Stillorgan	1. Possibilities for further community facilities should be explored in this area. 2. A range of services are required, including school aged provision.	1. The 2009 research recorded no community provision in the Stillorgan area. This may be due to the lack of defined disadvantaged areas in the LEA and the areas relative affluence hence the provision of private sector childcare. The research notes a similar number of not for profit places in this area relative to other LEAs. 2. School age childcare remains a need across all LEAs.

An analysis of unmet, future needs in the county & recommendations

The mapping exercise was structured so as to explore future and unmet needs in childcare in Dun Laoghaire Rathdown based on the feedback from providers, parents, stakeholders and employers/employees. Some of the main areas identified in respect of geography have been dealt with in some of the earlier sections. These are revisited here but treated in terms of themes and their prominence or not at the geographic level. This is followed by an analysis of needs in terms of service type, age group and related areas as cited in the findings from across the surveys, interviews and statistical data.

1. **Unmet and future needs in the county**

Geographic Need
The research suggests there is a need for full time places in the LEAs of **Ballybrack, Blackrock and Glencullen**. In addition, Ballybrack and Glencullen LEAs are the two areas in which there is likely to be housing development, depending on economic trends, over the course of the next six years based on zoning cited in the county development plan. This suggests therefore an increased need for childcare places in general.

The research also identified within the LEAs the EDs in which there are located a high relative proportion/number of children in the childcare relevant age range and also in which there are located a significant degree of families with children under 15 years of age.

Across all the LEAs, there is a need for **employment based childcare**. This is of course a difficult issue in its own right however the need would appear to be higher in those areas with current and likely future concentrations of employment such as the industrial/business park areas in Cherrywood/Carrickmines and Sandyford/Dundrum. However, as noted, this will also have to take cognisance of where these employees come from. The research has shown that in Dun Laoghaire Rathdown most of the children attending formal childcare reside in a radius of no more than a few miles of the childcare facility.

In the light of the difficulties that affordability causes in accessing childcare more generally, there is a need for **community and/or affordable childcare** across the board in the county. Based on this logic, this need is perhaps the greatest in Ballybrack (less affluent, decrease in community provision '06 to '09, and likely increase in population) and Dundrum. It should be noted that there is little community provision in the Stillorgan area, although this may well reflect the relative affluence of the area and lack of demand in specific locations in that LEA.

Finally, **school age childcare** increased its provision from the last mapping exercise when viewed in 2009. However, the need for school age childcare has been well documented in other research pieces, including that carried out by the National Childcare Committee[11]. Given this, and the fact that a generation of children and their parents have availed of and demonstrated a need for childcare in the preschool years, it is likely that this model will be required at later ages as the circumstances of parents after school and in term time remain.

Service Type & Age groups
The survey of parents in the research indicated a range of needs. Important needs identified included 53% of the parents requiring full time childcare of some variety. In addition, 21% of parents surveyed suggested their need for part time childcare in the mornings. 19% indicated a preference for part time childcare in the afternoons (including after-school). The remaining 7% indicated that they required part-time, less than 3 days a week/drop-in.

In addition, the survey of parents also revealed that 28% stay at home to mind their children, 25% use a crèche or nursery part time, 16% of parent's children attend crèches/nurseries on a full time basis and 12% leave their children with relatives. These findings also revealed that some parents use a multiple of childcare settings, based on their needs and means.

In respect of the comparison between parents' current and ideal childcare arrangements, the findings suggest a preference from staying at home to look after children and in particular leaving children with relatives to crèche/nursery part time (16%), crèche/nursery full time (25% to 27%) and increases also in those opting for playschool and afterschool care. On the whole, these suggest a shift toward formal childcare in ideal terms. Taken

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[11] Department of Justice, Equality and Law Reform, 2005.

together, approximately four out of ten (43%) of surveyed parents would use formal childcare along the lines noted above.

Although 62% of parents indicated that their current childcare arrangements meet all of their needs, over a third (36%) felt they met some but not all of their needs. For these, the main issues cited were the following:
- reference to work but childcare acts as a constraint
- childcare is too costly and is therefore prohibitive
- lack of childcare at term time (when schools are closed)
- lack of respite/short term childcare
- lack of flexibility, and
- lack of provision of development childcare which is affordable

The three main areas proposed in terms of priorities for the future development of childcare by parents were:
- cost and affordability of childcare
- standards and qualifications
- flexibility and choice around opening times

Other parts of the research - the perceptions of stakeholders - suggest that there may in general be sufficient places to meet current demand. However, exceptions noted were places in community childcare (full day care), places for babies, school age childcare along with over concentration in the sessional segment. It was pointed out that market conditions of supply/demand can dictate the types of provision that are seen, hence the prominence of services in the middle age cohorts. However, a key factor here is the ability to afford childcare thus there may be demand and need but insufficient means to pay for such provision in the current structure.

Regulation
The research acknowledges the important role that regulation has played in increasing quality in the provision of childcare in the county over recent years, and moreover, suggests that the process of regulation offers – where practicable - a developmental opportunity for childcare providers in the identification of actions which will improve their service.

In terms of school age provision, it was suggested that an important need is around its regulation along the lines of that provided for pre-school services.

Policies, Procedures and Management
The feedback in this research pointed to the need for more enhanced skills and practices in management of childcare centres, while this applied across the sector in Dun Laoghaire Rathdown it applied in particular to community sector providers. This included a wider understanding of management: from business skills, planning to HR. In addition, this theme also referred to the putting in place of policies and procedures of best practice for providers. Many providers are members of one of the national voluntary childcare organisations and this normally requires that such policies are in place. However it was suggested in the research that there is a need to work with a minority of providers around implementing best practice policies and procedures. This could be worked as a partnership form of regulation between the preschool inspection service and support agencies including the DLRCCC. Communication with parents was referred to also as an area for improvement for providers and parents alike. Related to this is the transparency - in respect of inspection reports and compliance with standards - of childcare providers which was viewed as a key element of quality in childcare by both stakeholders and parents.

Flexibility
The mapping exercise has shown that parents in particular felt that a more flexible suite of childcare provision was required. This varied from full time day care, to part time care, sessional care, three day, drop in, afterschool care and so forth. Although these options are available in some of the larger facilities, they are not always feasible for some childcare providers, most notably those in the community sector. Regardless of this, the provision of flexible childcare is a requirement for a large proportion of parents. Cost and affordability again plays a part in both sides of this issue.

Affordability

The affordability of childcare is a crucial and central issue that has been brought out in the research. The cost of childcare was generally viewed as comparatively high in Dun Laoghaire Rathdown. Affordability was seen as a particular issue for those who were less well off, and moreover, was mentioned by nearly every parent interviewed in the research. Some responses referred to the need for the provision of tax allowances and tax benefits for the childcare costs of parents. Others referred to the need for grant funding and subsidence appropriate and sustainable for both private and community providers. The rationale, suggested by providers, is that providing quality childcare (trained staff, health and safety, activities, equipment, meeting regulatory guidelines etc.) is expensive and has to be recouped through fees or other sources of funding. In addition, there was a call for reductions in external costs such as rates etc., for childcare providers which are passed onto parents increasing the costs of childcare.

Social inclusion

The issue of social inclusion, or more precisely, social exclusion was also prominent in the research. It is suggested that an effective 'two tiered' system of childcare operates whereby affluent parents can afford a higher quality childcare than those with less means. The research suggests this is at odds with equality thinking and is questionable in terms of the needs of children, especially those in more disadvantaged settings who would benefit from the early intervention afforded by quality childcare.

Childminding

It is clear that the majority of childminders are not notified to the HSE. The mapping research identified a need, on the one hand, to provide for greater supports to childminders to enhance their service and knowledge and, on the other hand, for greater formalisation of the sector. Both of these would be intended to increase quality in the childminding sector.

Training

The research shows overall that at least (given that some questionnaires did not complete this section) 60% of staff working in childcare in Dun Laoghaire Rathdown has at least a full FETAC level 5 award or higher award: 36% of staff have acquired a FETAC Level 5 and a further 24% have acquired a FETAC level 6 award or higher. There is considerable variation in the numbers and proportions that indicate relevant qualifications based on their role. This suggests that there is a need for increased training provision and access to such training for childcare staff. However, there is an issue about identifying suitable times and methods to allow for access while not undermining the day to day work of childcare providers. Training in this sense as a general issue includes everything from focused information workshops to more in-depth certified training which is affordable and accessible. It should be noted that some of the key aspects of quality identified in the research about childcare focused on the training, qualifications and professionalism of childcare staff.

Economic Environment

The current economic environment casts a shadow over the findings of the research given the very real impact difficult economic circumstances are having on parents, childcare providers and their staff. The main difficulties cited were decreases in parental income due to the combined impact of losing jobs, income reductions, and short time working. This in turn has led to a decrease in hours, sometimes dramatic, of children's attendance or the removal of children from childcare altogether. This process, unfortunately, can adversely affect the income of the providers who have fixed costs such as rent, insurance, rates etc. These cycles result in some providers - with decreasing income - having to lay off key staff, reduce the service (and threaten its quality) and, in some cases, close altogether.

Child Centred Approach

Although this seems self evident in childcare, the largest proportion of parents suggested that the key indicator of quality was that the childcare facility or provider should have a child centred approach. The concept was seen to be based on a nurturing and positive atmosphere/environment in childcare. There was the sense emerging from the findings that as services get bigger, it is more difficult to provide this type of setting given the demands of managing a larger operation. It was therefore noted as an area for exploration in the future.

Curriculum

The research findings stressed the importance of a structured, developmental curriculum in the childcare setting and therein cited the importance of varied activities for children which is appropriate to their developmental age. This issue is more complex given the different types of curriculum and their respective approaches that might be followed. The key issue however would seem to be that parents, stakeholders and providers view the provision of planned/structured activities and curricula as an important part of childcare. It follows that efforts ought to be made to ensure that all childcare provision offers some aspect of a developmental curriculum.

In and Outdoor Facilities

The importance of good indoor and outdoor facilities was another indicator of quality in childcare in the view of parents. The stakeholders' feedback suggested that some childcare premises might be (through the provision of support) improved in their layout, size, outdoor activity and play areas. It was suggested that in and outdoor facilities might be factored as a principle, in as far as practicable, in the future development of new childcare facilities.

Supports

There was a wide array of supports suggested in the research for parents and childcare providers, which can also be viewed as needs. The main supports, apart from those already detailed and cited by parents in respect of childcare are: information on provision (including childminders); parenting courses; and, choice and flexibility. For providers, supports were cited as: advice and development; compliance and facilitation; how to go about early intervention and social inclusion; networking; collective promotion as opposed to individual marketing; and, information dissemination about childcare in the county to parents.

Interagency Collaboration

Since the establishment of the CCC in Dun Laoghaire Rathdown, the research suggests there has been an increase in collaboration between community/voluntary, statutory and private sector interests in childcare. In this vein, the research suggests the need to support collaboration between agencies and also providers where practicable.

Employer based childcare

This issue was dealt with under 'geographic need'. Earlier research on employers revealed that there are few interactions between employers and childcare providers in the county; this should be improved by the development of a conduit between the two. The aim of this is to increase the referral options open to employers around childcare issues for their employees and also to develop another source of information for employees about childcare and work/life balance issues. A key recommendation made therefore is the development of childcare policy templates for the vast majority of employers who do not presently have such a policy in place.

The cost to businesses, especially SMEs, makes involvement in childcare related issues for their employees unfeasible. This was a finding from research in 2008 but is perhaps all the more relevant subsequently. This is a policy issue and calls for a more thoughtful and strategic approach by the state to these issues based on the findings of this and earlier pieces of research.

Future Strategy & Priorities

In addition to actions via recommendations in respect of the above needs, the areas or themes cited for strategies to improve childcare include: quality; integration of childcare; increasing supply; involving parents; affordability and choice; support for stay at home parents; child-centred; work/life balance; co-ordinated information transfer from local to national on policy related matters; availability of development and subsistence funding; and greater provision in childcare for socially excluded groups.

2. Recommendations for the Way Forward

This mapping exercise has provided a comprehensive overview of childcare in Dun Laoghaire Rathdown in 2009 and builds on the 2006 research. Overall, the extent of provision, across a number of indices, has increased in 2009 when compared with 2006 and this is a valuable finding. However, the trend in the makeup of provision, across age ranges or type or description, is generally in line with that seen in 2006. Thus there are a number of areas that require attention over the next number of years in terms of a strategic response on the part of the County Childcare Committee.

The ***key conclusions of this research are detailed above*** in the various sections, ***each of which responds to one or more of the main questions posed at the outset*** of the mapping process. This final section of the report focuses on how some of the conclusions can be presented in terms of related recommendations for the County Childcare Committee, its partners and others, where relevant.

i. *Future Childcare Provision*

One of the central tasks of the mapping process was to map where there is likely to be future – and current – need for childcare in Dun Laoghaire Rathdown. The research points in particular to ongoing and future need for childcare provision in the **Ballybrack LEA**. This is due to the likelihood of development in that area and other issues as noted above.

Following the Ballybrack LEA, there is future childcare provision need – though not as clear - in the **Blackrock** and **Glencullen LEAs** also.

Childcare facilities should ideally be located within three kilometres of new and increasing residential and related developments. They should facilitate walking, the use of public transport and parking within reason.

While the mapping suggested that overall provision is close to sufficient at present, there are a number of clear gaps that should direct discussions about future needs, plans and developments. In this regard, there is a ***need for full day care provision*** in the community sector and in areas of disadvantage. A key issue here is ***affordability***, which will be returned to later in this section. Although there has been an increase in ***school age childcare*** provision since 2006, there is still a great need for provision for children of school going age. This again is a particular need in the community sector. The research also noted a need in childcare services for under ones.

ii. *Affordability, Inclusion and the Economic Environment*

The issue of social inclusion and affordability emerged strongly in the research. It is apparent that affordability is a significant issue for all parents regardless of means. At best, it puts considerable strain on families and, at worst, it results in a lack of developmental childcare for children. This 'two tiered' childcare system also raises questions about equality. In this regard, there is a ***need to explore how childcare in Dun Laoghaire Rathdown can become more inclusive*** and more accessible to the large number of parents who indicated they would opt for childcare to some extent if an affordable option was available to them.

In addition, the research suggests that there are questions about how, with the onset of Siolta and the ECCE scheme, childcare can play a developmental role for children and act as an ***early intervention for those children most at risk***. This is obviously an issue that has a resonance beyond Dun Laoghaire Rathdown or indeed the childcare committee's remit. As such, it requires some exploration and discussion through advocacy and lobbying, and suggests a requirement of support and assistance for parents in general, less well off parents and providers alike.

As noted, the current economic environment has had a detrimental effect on many families. As in other segments of the economy, this has had knock-on effect on childcare uptake and retention. There would appear to be a need to consider developing ***supports for providers whose viability is threatened***. Such supports may be around management, business planning, marketing and promotion, pricing, the identification of financial supports and so forth.

iii. Additional Recommended Actions

Flexibility: It is recommended that future (and current where practicable) childcare provision across the county should be of sufficient size and capacity to provide for flexibility in the options available to parents from full time, to part time, to part week and so forth. Flexibility in provision should be a central principle of future provision.

Regulation: The process of regulation offers a developmental opportunity for childcare providers in the identification of actions which will improve their service. In addition, there is a need in view of quality and Siolta etc., to have regulation regimes in place not only for 0-6s, but also school age childcare and for childminders. There should also be a support system put in place to help providers reach the required standards over a reasonable time.

Policies, Procedures and Management: Greater efforts should be made to provide supports to providers around enhanced skills and practices in management of childcare centres, in particular to community sector providers. Relevant providers should be supported in putting best practice policies and procedures in place. This could proceed as part of a partnership form of regulation between the preschool inspection service and support agencies including the DLRCCC. This process would also involve increased communication with (in respect of improving knowledge of childcare) and involvement of parents in childcare provision.

Training: Despite the welcome increase in the proportion of childcare staff with formal training in childcare, opportunities and assistance are required to facilitate progression in training to higher levels of qualifications. It is important therefore that accessible and affordable training is sourced, provided and promoted. One important aspect of this is to facilitate day time training by provision of replacement temporary staff for existing providers. This could be achieved as part of a shared pool or a panel of temporary childcare workers.

Curriculum: To improve the quality of childcare more generally and to meet with improving standards cited for instance as part of the ECCE, it is suggested that providers – where applicable – are assisted with the inclusion of a structured, development curriculum in the childcare setting and therein, in the varied activities for children which is appropriate to their developmental age. An important related aspect of this is for providers, regardless of size and constraints, to be encouraged to prioritise a child centred approach.

In and outdoor facilities: It is recommended that greater cognisance be taken of guidelines (such as those developed by the IPPA) in respect of the size and structure of in and outdoor childcare facilities. This may take the form of a pilot of sorts in Dun Laoghaire Rathdown or as part of regional effort with a view to its mainstreaming at a later stage and therefore as part of planning applications and their assessment.

Supports*:* Arising from the mapping research, it is recommended that more focused and tailored support structures be put in place for childcare providers and parents which will include information of provision (including childminders); advice and development, early intervention and social inclusion, networking, in addition to those recommended elsewhere.

Interagency Collaboration: Development efforts are required to support the ongoing networking between private sector providers. To increase the value of support to the sector and in view of the best use of resources, it is suggested ongoing supports are provided for collaboration between agencies and also providers where practicable.

Employer based childcare: The recommendations of the previous employer research carried out for DLRCCC should be implemented but with an eye to the current economic environment and what is feasible in terms of progress in the short to medium term*.*