

Assessment of Childcare Sufficiency 2008

for



REPORT

Introduction

Statutory Duty

The Childcare Act 2006 underpins the Assembly Government's childcare strategy "Childcare is for Children" and enshrines in law:

- Parents legitimate expectation of accessible high quality childcare for children and their families; and
- Local Authorities responsibilities for providing information to parents and prospective parents to support their parenting role.

The Childcare Act achieves these aims through statutory duties that build on Local Authorities' existing roles and responsibilities. In Wales it will:

- Place a duty giving Local Authorities the lead role in facilitating the childcare market to ensure it meets the needs of working parents; in particular those on low incomes, those with disabled children, or those who wish their child to attend Welsh medium provision.
- Ensure people have access to the full range of information they need as a parent.

The intention of the Act is to place a duty on Local Authorities in Wales to secure, as far as is reasonably practicable, sufficient childcare to meet the requirements of parents in their area who require childcare in order to train, to work, or to prepare for work. The Act provides the Assembly with powers to make regulations requiring Local Authorities in Wales to prepare assessments of childcare sufficiency in their areas.

Sufficient childcare, in Section 6 of the 2006 Act, is defined as 'sufficient to meet the requirements of parents in [the local authority's] area who require childcare in order to enable them –

- a. To take up, or remain in, work, or
- b. To undertake education or training which could reasonably be expected to assist them to obtain work.

In determining whether provision of childcare is sufficient a local authority:

- a. Must have regard to the needs of parents in their area for –
 - the provision of childcare in respect of which the childcare element of the working tax credit is payable, and
 - the provision of childcare which is suitable for disabled children
 - the provision of childcare involving the use of the Welsh language.
- b. May have regard to any childcare which they expect to be available outside their area.'

At its core, the Assessment provides an analysis of supply and demand that highlights the potential gaps in the local childcare market.

Data for the Assessment has been gathered by Middle Layer Super Output Areas. These comprise groupings of lower layer areas used for collecting Census data and have an average population size in Torfaen of 7,000 people. There are 13 Middle Layer Super Output Areas (MLSOA) in the County Borough as shown in Figure 1.

During January 2008, a consultation exercise took place to establish the views of parents and carers in Torfaen regarding childcare.

A paper survey was distributed to all parents of school-aged children in Torfaen via schools, through existing childcare provision, and in number of other locations where parents meet. An on-line version was also made available.

In total, 15,000 survey forms were distributed and 812 responses were received representing a 12.4% response from all families with children aged 0 to 14 years in Torfaen. This was a statistically significant response meaning that we can be 95% sure that answers to the questions were representative of all families in Torfaen.

Face-to-face consultation took place through existing structures such as parent and toddler groups; the integrated centre; pre-schools; health clinics and other locations where parents were already meeting. 83 parents in 19 groups across Torfaen were interviewed individually using a consultation framework. In addition, a number of professionals working with specific groups of parents were interviewed to gain their perspective on childcare supply and demand.

Childcare providers were engaged through a telephone survey carried out in January 2008. In total 154 childcare providers were interviewed as part of the assessment representing almost all currently operating formal childcare.

Conclusions have been drawn in line with draft guidance on Section 22 and 26 of the Childcare Act (2006) as published by the Welsh Assembly Government.

This draft *Childcare Sufficiency Assessment Report* provides a summary of the key gaps in childcare provision in Torfaen. Copies of full *Childcare Sufficiency Assessment Analysis Report* are available on request.

Figure 1: Torfaen Middle Layer Super Output Areas



1. Children and Families in Torfaen

The total number of children aged 0 to 14 that needs consideration in the Childcare Sufficiency Assessment is 16,573 plus an estimated 691 children aged 15 to 17 with disabilities (17,264 children and young people).

Children are not spread evenly across the County Borough, with proportionally more children in the *Greenmeadow, Trevethin & Penygarn, Fairwater* and *Henllys* areas than anywhere else. Potential demand for childcare should therefore be higher in these areas.

In 2006 there were a lot more children and young people in the 9 to 15 age group than amongst other ages. Children aged 4 to 8 had the lowest population. A rise in the number of under 3's follows a national trend of increased births that if it continues should increase demand for childcare services.

Torfaen has a very static population overall, but has a declining child population. There were 1,310 less children in 2006 than there were in 2001 representing a 7% drop in the population. This continues a trend that has been consistently downwards in recent years despite the recent rise in births.

Statistics do not show any significant influx of children into Torfaen through migration and community consultation found no evidence of any significant numbers of migrants from EU accession states as found in other areas of SE Wales.

The Local Development Plan sets out to enable the building of 7,000 new dwellings in Torfaen between 2006 and 2021. Cwmbran will see the largest number of new homes. It is unclear at present what the overall impact on childcare demand the new developments will have, but while there will be local changes in demand, the pace of development is unlikely to place immediate pressure on provision.

Torfaen has a very small black and minority ethnic population that is dispersed across the authority and to all accounts, well integrated.

Welsh is not widely spoken in Torfaen with just 11% of the population being able to communicate in Welsh. Welsh speakers are spread fairly evenly across the County Borough.

Family structures in Torfaen are slightly more traditional than in Wales as a whole with more children living with married parents and less with lone parents than is the average nationally. However, there are big differences across the authority with over 40% of children living with a lone parent in some areas.

Lone parents often have the greatest need for childcare and a lack of childcare is often the greatest barrier to them working. In Torfaen as a whole, around a half of lone parents are in work, although in some areas nearly two-thirds do not work.

2. Economic Activity

In assessing current and future demand for childcare, an examination of local economic conditions – including levels of economic activity in families, is important.

In Torfaen, economic activity levels are in line with the averages across Wales. The number of people in work is slightly above average and the number out of work, slightly lower.

Worklessness disproportionately affects children. Nearly a quarter of all children in Torfaen live in a household where no adults are working. Of these, 63% are from lone parent families for whom childcare is more likely to be a barrier to work.

Earnings in Torfaen are 4.5% above the average for Wales, but 5% below Great Britain. The average Torfaen family with one parent working full-time and one working part-time would earn £32,274 per annum.

The majority of children in Torfaen live in families with moderate incomes but there are some differences across the area and in some places more than half of all children live in families that either do not work, or have very low earnings.

Tax Credits are designed to support working families but there is evidence to suggest that many families are not taking up their entitlements. This is particularly true for the childcare element of the Working Tax Credit.

More people travel out of Torfaen to work, than travel in, but in general, Torfaen residents work relatively locally.

Three-quarters of women with children in Torfaen work outside the home. As women are usually the main carers, demand for childcare to support female employment should be quite strong. However, less than half of women work full-time compared with the overwhelming majority of men. The level of part-time work will inevitably reduce demand for childcare as women look to work around caring responsibilities.

Of those women not working, nearly a quarter said that a lack of accessible childcare was a barrier to them gaining employment. If childcare were available to this group, the local economy could benefit by as much as £8m per annum.

3. Childcare: Supply

Compared with other local authorities in Wales Torfaen has a high level of registered childcare – and the highest in South Wales.

In November 2007 there were 237 separate childcare and play services recorded by Torfaen Children’s Information Service. Of these, 200 were providing registered childcare.

Taking all places in registered childcare services (excluding playschemes), there were 3,373 places available to families in Torfaen.

Childcare services are not spread evenly across the County Borough with more childcare available in the south-east and in general, there is less childcare in the most deprived areas.

Early Years Childcare (for children under 5) in Torfaen is provided by childminders, day nurseries and ‘wrap-around’ services that compliment sessional care or early education sessions. In 2007, there were 1,199 daycare or wrap-around places for children under 5 providing just over 1 place for every 4 children. In Wales in 2006, the figure was just over 1 place for every 6 children.

Day nursery services are concentrated in the more affluent and most accessible areas of the County Borough, while childminder and wrap-around services are more evenly distributed.

Although 20% of parents with young children care for children themselves, 56% use formal childcare services in Torfaen. Levels of informal childcare use in Torfaen are much lower than in other parts of South-east Wales.

There were 120 registered childcare services for school aged children in Torfaen in 2007 including 79 childminders, 19 after school clubs, 8 before-school clubs and 14 holiday clubs.

Set against the population of children and young people, there were 9.3 out of school places for every 100 children aged 5 to 14 (and to 17 for children with disabilities). The average rate for out of school childcare in Wales in June 2007 was 5.9 places per 100 children.

In relation to the population of children, levels of school-aged childcare are far lower than for pre-school children, but there is a good level of provision across all areas compared with Wales averages.

There were 22 before and after school clubs in Torfaen serving 36 primary-phase schools in 2007. There is a good spread of before and after school care in Torfaen with the majority of schools served locally by an out of school club.

Torfaen has a relatively high level of holiday provision for children under 8 years, and extensive open access provision for older children.

Sessional Care is used primarily to provide pre-school playgroup / *cylchoed meithrin* and early years education services to children aged 2 to 4 years of age, for sessions of 2 ½ to 3 hours at a time. In Torfaen there were 25 sessional care providers in 2007 offering 733 sessional places between them.

Because of the short sessions provided, Sessional Care is generally not providing childcare for working parents on its own, but 17 settings in Torfaen provide a wrap-around service themselves or in partnership with other providers for children in sessional care or in early education.

Part time funded early education is currently available to all children who want a place from the term following their third birthday in Torfaen. Early education is provided by 3 nursery schools and 15 school nursery classes, alongside 18 sessional or daycare care settings.

There would seem to be enough early education provision in Torfaen to meet the needs of all 3 and 4 year old children in the local population, but there is limited choice for parents who need an integrated package of care and early education.

Childcare provision for disabled children is provided in Torfaen by mainstream childcare settings and some specialist services. Disabled children took up just 1.3% of registered childcare places in 2008 and on balance, it would seem that disabled children are probably not taking up places in mainstream settings proportion to their population.

Although some Welsh is used in a third of childcare settings, there is limited choice of Welsh-medium or bilingual childcare provision in Torfaen. Significant choice of Welsh language childcare is available only in sessional care and early years education and is not available in many areas of the County Borough.

4. Childcare: Demand

An indication of unmet demand for childcare can be made from the number of vacancies currently available in existing childcare settings. In 2008, three-quarters of all childcare providers had vacancies but only 9% of all registered places were empty. This suggests strong demand for existing services.

Very few day nurseries in Torfaen had full-time vacancies. Only 3% of day nursery places would be available for working parents wanting full-time care. Similarly, early education settings, sessional care settings and wrap-around services had few vacant places and even fewer were available on a full-time basis. Childminders had more vacancies, but not in all parts of the County Borough.

By area, only Abersychan has any significant level of vacancies above the 15% benchmark that would indicate some over-supply.

In general, vacancy rates would seem to indicate strong demand for existing childcare services and in particular, services for pre-school children.

Overall, twice as many childcare settings reported increasing demand than reported any decline. Childminders were the only sector where a majority of providers reported a decline in enquiries. Many childminders said that they were feeling the effects of increased competition.

While most parents had a good understanding of childcare and childcare issues, research found that parents in more deprived areas and parents in less-advantaged groups were less aware of childcare choices and childcare information than other parents.

74% of families with children aged 0 to 14 in Torfaen regularly use childcare. Informal childcare provided by relatives or friends (18% of childcare use) provided the most frequently used. Formal childcare (including daycare, sessional care and out of school childcare) was used by 49% of all parents. This is a higher proportion than in many other areas of Wales.

Overall, parents in Torfaen were happy with most aspects of childcare in their area – except that they felt that they couldn't afford it. There were also a sizeable number who felt that the choice and availability of care

was not good and a significant minority felt that there was a shortage of Welsh Medium childcare services.

40% of parents said that in many areas there was not a good choice of local childcare - either the type available, or choice of different providers. Choice was also limited by a lack of available places in some settings.

A large number of parents of children of school aged children would like to see before and after school care at all schools.

The greatest demand from parents of school-aged children would seem to be for additional holiday provision.

A sizeable number of parents would like childcare for older children during the first years of secondary school both after school and during school holidays.

Parents who use informal care sometimes would prefer not to, but cannot – or will not – pay for formal childcare.

There is felt to be a shortage of childcare in some areas that could be solved with more childminding provision. However some parents are reluctant to use childminders.

Accessibility of childcare is perhaps less of an issue in Torfaen than other areas, as transport links are good with arterial routes running through the County Borough.

Many parents said that there was a lack of childcare that catered for people working shifts or unusual hours. Others complained that existing opening hours did not meet the needs of working parents who commute.

More than half of all parents said that childcare was unaffordable, with many parents on low incomes, or with low earning potential saying that it wasn't worthwhile working. The situation is compounded by a mistrust of the tax credit system and a common perception amongst parents that childcare is unaffordable.

Many parents choosing informal care would like to be able to pay relatives for supplying childcare.

Although many parents use the Children's Information Service, others have not heard of it. Parents in less affluent communities or in hard-to-reach groups need information delivered personally.

Most parents are happy with the quality of childcare on offer in Torfaen.

Childcare for disabled children is often provided by mainstream childcare settings but in many cases parents are not confident in accessing services.

Some parents feel that their disabled children need specialist childcare provision that isn't currently available.

A sizeable group of parents feel that there is insufficient Welsh medium childcare available. Parents who are choosing a Welsh medium education for their children are those that were strongest in their desire for Welsh medium childcare.

There also seems to be unmet demand for more choice of Welsh-medium daycare and sessional care – and free Welsh medium early education in particular.

Taking into account a range of indicators, there is clearly high demand for childcare in many areas of Torfaen. Here, new childcare should develop in response to market forces. In the areas of lowest demand, intervention by the local authority may be required to secure additional childcare if it is needed.

5. Market Analysis

The evidence presented in this report highlights many issues regarding the supply of childcare and the demand for childcare places.

Geographical Gaps

Relating the supply of childcare to demand is a complex calculation that involves many variables. The most obvious method of identifying childcare gaps geographically is to examine current levels of provision in different areas and plan to 'bridge the gap' between the current level of provision and the Torfaen average

In total, this would require 272 new daycare places (with day nurseries, childminders or through wrap-around care) to be created along with 133 term-time out of school places and 189 holiday scheme places. The total number of new places in each area are set out below:

Figure 2: Childcare gaps based on average levels of provision¹

Area	Additional Daycare Places	Additional After School Places	Additional Holiday Places
Blaenavon	0	4	1
Abersychan	32	0	0
Trevethin & Penygarn	64	34	44
Wainfelin	0	2	0
New Inn	0	0	0
Panteg	18	2	23
Pontnewydd	34	37	31
Croesyceiliog	0	0	0
Greenmeadow	61	17	42
St Dials	0	0	0
Fairwater	62	0	17
Henllys	0	37	31
Llantarnam & Ponthir	0	0	0

Filling the gaps identified above through developing new childcare places would result in a minimum level of provision being available in all areas of Torfaen, and there is some evidence from the levels of vacancies in current settings, and in consultation with parents, that there is demand in some of the areas highlighted for childcare services to fill these gaps.

¹ Calculations based on number of childcare places per 100 children in the local population against the Torfaen average for the care type.

However, the analysis fails to recognise the social and economic factors that mean that demand is depressed and sustainability of provision through charging fees alone may be doubtful.

To identify areas of Torfaen where childcare is both needed and would be sustainable, the gaps in *current provision* need to be placed within the context of the Demand Index as set out in *Section 6*.

The following table combines a range of data to summarise the local childcare supply and demand situation in each area of Torfaen. While this may provide some guidance in developing strategy, further local context will need to be sought prior to any new development of childcare places.

Figure 3: Supply & Demand Analysis by Area

Area	Early Years Care Supply Level	Out of School Care Supply Level	Demand Level
Blaenavon	high	low	low
Abersychan	low	high	low
Trevethin & Penygarn	low	low	low
Wainfelin	high	low	low
New Inn	high	high	high
Panteg	low	low	high
Pontnewydd	low	low	high
Croesyceiliog	high	high	low
Greenmeadow	low	low	low
St Dials	high	high	low
Fairwater	low	high	high
Henllys	high	low	high
Llantarnam & Ponthir	high	high	high

- Areas with **low** supply and **high** demand are those where development of more childcare is needed and should be sustainable.
- Areas with **low** supply and **low** demand are those where it is unlikely that the market will develop childcare places. To increase childcare supply intervention in the market is likely to be required to stimulate demand
- Areas with **high** supply and **high** demand are those where the market is most likely to be functioning and market forces will meet supply with little further intervention.

- Area with **high** supply and **low** demand are likely to have a sufficiency of childcare. It is possible that there could be an over-supply in these areas.

Income Gaps

Compared with Wales as a whole, the cost of childcare in Torfaen is fairly average as are family incomes. For many families in Torfaen, childcare should be affordable (although clearly many resent paying for it).

However, there are a quarter of families in Torfaen who because of low earnings or low earnings potential are likely to find childcare unaffordable. While the childcare element of the Working Tax Credit should enable most parents to pay for childcare, some fall outside of the scope, aren't aware of it, or have a mistrust of the system.

If given the right support and information, many parents on low incomes would be able to pay for childcare. Whether they are willing to pay for childcare is the critical question.

It is clear that the proportion of family income spent on childcare is far greater when children require early-years care; and as a proportion of family income is greater for lone parents than for couples.

Whether or not childcare is affordable will depend on a range of other factors – including housing² and other household costs – and individual perceptions of what people find affordable.

To enable more parents to use childcare in Torfaen, strategies are needed that tackle both affordability for parents on low incomes and to increase accessibility for parents who can afford childcare but have no access to it.

Specific Needs Gaps

Parents of disabled children want to be able to access the same range of services as anyone else and the Disability Discrimination Act (DDA) should enable them to do this. Parents of disabled children often need childcare for different reasons but often do not have the confidence to use mainstream childcare settings. Funding for additional support staff may be an issue for some settings, but better information for parents and a greater understanding by childcare providers would improve accessibility.

² Average mortgage costs in Wales take up 17% of average net family incomes. Council of Mortgage Lenders (2007)

Parents from hard-to-reach groups are less likely than others to be using formal childcare and in some cases are prevented from doing so by a lack of information. Their needs can only be met through information and advice being presented at an individual level by people that they know and trust. This suggests that a multi-agency approach is required with clear, concise information on signposting provided to all professionals working with families.

Time Gaps

The majority of childcare available in Torfaen operates within fairly 'standard' hours, which in some cases are not meeting the needs of parents working hours. This is particularly the case for parents who commute, where an extra 30 minutes of childcare at the beginning or end of the day could make a big difference. It would be helpful for childcare providers to review their hours in consultation with their customers.

There is some unmet demand for childcare from parents working shifts that could be met by childminders. Information is key here, in providing parents with the links to childminders who are willing to operate outside of normal hours.

Language Gaps

Parents would like more choice of Welsh medium childcare. This includes Welsh medium daycare, early years education, sessional care, after school and holiday care, but in particular, childcare that compliments Welsh medium education in Torfaen.

Age Gaps

0 to 2 year olds

There is a limited supply of childcare places for this age group and few vacancies for babies, suggesting that more provision could be sustained.

Three and four year olds

Most three and four year old children are in receipt of funded early education places in schools, daycare and sessional care settings. A considerable amount of wrap-around care is available, but provision is not universal and there would seem to be limited vacancies indicating unmet demand. More wrap-around care could provide parents of three and four year olds with more choice and flexibility to be able to work.

5 to 11 year olds

Although Torfaen has a high level of out of school care compared with other authorities, provision is not universal and there would seem to be a large number of parents who would like to see more provision, particularly at schools not currently served by an out school club.

Holiday care is available in many parts of the County Borough but there are gaps that could be filled through demand-led provision. While open-access services meet the needs of many older children, opening hours mean that provision is not supporting the majority of working parents.

12 to 17 year olds

As parents increasingly rely on good quality out of school childcare for their children in primary schools. Many working parents are unhappy about children being left to go home alone at the end of the school day. Appropriate provision for older children is needed in or around secondary schools.

6. Recommendations

Given the local authorities role in managing the childcare market the following recommendations should be followed to bridge current supply and demand gaps.

Early Years Education

There would seem to be sufficient early years education provision to meet existing demand in Torfaen and overall, parents and carers are satisfied with the quality of provision. There is no case for developing any significant number of new places other than to provide parents with more choice in some areas, and more choice of early education and childcare provision that meets the needs of working parents. There would seem to be a shortage of Welsh-medium early years education provision, but more provision is about to come on stream. Reassessment of the position will be needed once these places become available.

Pre-School Childcare

While Torfaen has high levels of Pre-school Childcare, there are a small number of areas where further development could take place and would be sustainable as indicated by a high demand for services in, for example, Cwmbran. In particular, there are limited numbers of places for babies in day nurseries. The role of the local authority should be to oversee the operation of the market here, but it should not need to intervene.

In other areas where there are low levels of Pre-school Childcare but there is low demand, it is unlikely that additional provision would be sustainable. The development of a day nursery serving the north of the County Borough seems to have stimulated demand in this area, but not to the extent that more provision is needed.

Childminders in Torfaen provide the backbone of childcare provision for all ages but are the most vulnerable to new group-care developments. The local authority needs to carefully monitor their numbers and should do more to promote childminding services to parents to retain this core level of flexible childcare provision.

Appropriately trained and resourced childminders could also provide the key to enabling more parents of disabled children to access childcare.

School-aged Childcare

The focus on developing after and before school services should be around filling gaps in provision to ensure that all primary schools in Torfaen are adequately served by an out of school club. In many cases this can be achieved as part of Community Focused Schools.

There is growing demand for the development of specific services for children of secondary school age that also needs to be addressed as part of Community Focused Schools. The appropriateness of care provided needs to be examined to ensure that it is meeting the needs of older children and young people. To this end, young people should be engaged alongside their parents to establish how their needs can be met.

Although levels of holiday provision across Torfaen are relatively high there is some unmet demand expressed by many parents, and limited provision in some areas. The local authority should encourage the development of more provision where it would be sustainable.

The development of specialist childcare for school-aged disabled children should be supported as well as improving information, training and advice to mainstream out of school clubs to enable them to become more accessible to disabled children and young people.

Flexible Childcare

All childcare providers need to be encouraged to examine the flexibility of their services to meet the needs of parents. Childcare providers in general need to become more customer focused and talk to parents who use their services (and those that don't). In particular, there seems to be a mismatch over issues such as charging structures and opening hours. For example, in some cases, minor adjustment to opening hours could make a big difference to some working parents. In other instances, more flexibility over the way fees are collected could make their services more accessible to many more parents.

While there are parents who work shifts, weekends and other unusual hours, there are probably not enough of them wanting childcare at the same times to sustain new or extended provision. However, childminders provide a range of flexible services that could meet the needs of some parents, but this is not widely known by parents.

Information

The profile of Torfaen Children's Information Service should be raised to promote information for parents with which they can make educated choices about childcare. Accessible, accurate information is the key in enabling parents to use childcare that in turn will sustain existing services and stimulate new demand.

A coordinated approach delivered in harmony by a range of agencies (covering childcare, housing, debt advice, Job Centre Plus etc.) is needed to provide parents in hard-to-reach and marginalised groups with information that enables them to overcome the barriers to finding and remaining in work. The Genesis Project has been active in taking this approach, but method needs to be mainstreamed beyond the life of the project.

The new requirement within the Childcare Act to broaden the scope of existing information services provides an excellent opportunity for Torfaen County Borough Council to invest in support that enables parents – and lone parents in particular - to access childcare and therefore work. Success in this could benefit the local economy to the tune of £8m per year – the amount estimated to be lost through childcare currently being inaccessible.

Sustainability

Because most existing childcare in Torfaen should be sustainable through market forces, local authority intervention and funding to the sector needs to be focused on supporting existing high quality provision to attain sustainable occupancy rates, while recruiting new providers (mainly childminders) to cover natural wastage (the recruitment and retention of flexible childminders is critical as this is the only option for parents working unusual hours).

Where new services need to be developed to fill gaps identified in this report, in most cases the local authority's role will be in supporting market-led developments. In areas where the market is not functioning, the Council will need to support developing provision as part of Community Focused Schools, Flying Start and Integrated Centre developments.

Welsh Medium Childcare

Where there is significant unmet demand alongside limited supply of Welsh medium childcare, the local authority should encourage new Welsh medium services to be developed.

In some areas, parents would like to see more choice of Welsh medium childcare, but additional childcare places are not always needed. There is a danger of unsustainable competition for a limited number of children if parallel Welsh and English medium services are created in areas where there is no significant demand for additional childcare. This would lead to sustainability problems for both. This could be avoided if more Welsh-medium or bi-lingual childcare options for parents were developed within existing settings, and more Welsh speaking childminders were recruited.

The Role of the Local Authority

The importance of childcare in tackling child poverty, in improving the local economy and in supporting educational attainment should place childcare at the heart of a range of local strategies. The new duties on the Council to manage the childcare market need to be taken seriously and resourced appropriately.

To date, much of the support for childcare provision supplied by the local authority has been universal, with some targeting of the more deprived areas through funding for new provision. This assessment of sufficiency suggests that the childcare market is functioning adequately across much of the County Borough in meeting the needs of most working parents.

In the majority of areas, the role of the Authority should be in monitoring levels of supply against changing demand; providing information; and ensuring high levels of quality. Less emphasis on universal support should enable resources to be released to target hard-to-reach groups of parents who need intensive support, or specific areas where the market is not functioning. This could make a dramatic difference to families and their ability to participate and contribute to the local economy, and to raise children out of poverty.