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Social Care **Wales**

National Conversations: with the Child Care, Play and Early Years sector in Wales



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National Conversations with the Early Years and Child Care Sector in Wales

Background to the National Conversations

On 18 March 2020, responding to emerging scientific advice, the Minister for Education issued a statement regarding the operation of schools in Wales and the intention to bring forward the Easter holidays. Following this, a joint statement from the Minister for Education and Deputy Minister for Health and Social Services was issued on 20 March 2020. This second statement reflected the advice that all children should be cared for at home wherever possible, with both schools and childcare settings asked to remain open only for the children of critical workers and vulnerable children. As a result of this some childcare settings took the decision to temporarily close.

This was reflected in the advice and guidance, which said childcare settings remained safe, as long as numbers of children remained low, and the wider public health advice was followed. In light of those statements, the Welsh Government and their partners worked to ensure that parents and children who continued to access childcare had the required support and that parents who were front line staff did not face barriers in responding to Covid-19.

Across Wales approximately a third of all schools remained open for older children to attend on a hub model. Many childminders operated through the initial three months of the outbreak, but only a small number of day care settings remained open to support the needs of pre-school children whose parents are critical workers or children who are vulnerable¹.

On 19 June 2020 the First Minister confirmed childcare settings could increase their operations from 22 June, enabling them to accept a wider cohort of children. Guidance to support childcare settings in their preparations was published on 10 June 2020.²

Following the increased operations and subsequent national lockdowns, childcare has maintained operations albeit with some services choosing to remain closed. There has been a raft of guidance and support offered to the sector to support childcare and play settings operate during the pandemic.

The Welsh Government wished to understand the lived experience of providers and carers in the Childcare, Play and Early Years sector (CPEY) during the pandemic. To meet this aim, Social Care Wales undertook qualitative research in the form of a number of National Conversations, to help understand the sector's experience of the pandemic.

¹ <https://gov.wales/sites/default/files/publications/2020-08/childcare-play-and-early-years-division-response-to-covid-19-integrated-impact-assessment.pdf>

² <https://gov.wales/protective-measures-childcare-settings-keep-childcare-safe>

Summary

The Conversations were held between the end of February and the end of March 2021 with a selection of providers, carers and the umbrella organisations that support them. Some of the umbrella organisations supported with recruiting participants to take part and held events where providers could participate. The people taking part in these forums did not necessarily represent the views of the organising agency. The Conversations provide a snapshot of what nurseries, sessional providers, childminders, and playworkers, who were able to take part, were experiencing working through a pandemic at that time. Appendix A provides a breakdown of participants.

The findings were broken down into the following themes:

1. Wellbeing and Morale

This section focused on understanding what provision was available to support staff wellbeing and morale during the pandemic. The main focus was intended to be the staff, however many discussed the impact of the pandemic on the wellbeing of the children they support. Although support was available through Welsh Government, CWLWM partners and local authorities, there was a strong sense of feeling undervalued and underappreciated. This was particularly articulated in relation to not being seen as professionals alongside others such as teaching staff. There was also a sense that communication was not always clear or had not been heard.

2. Business support

We wanted to understand what business support settings had accessed and how they found the process. Most of those we had conversations with had accessed some sort of business support for which they were grateful. Settings had found the levels of support available useful and welcomed. However, experiences of applying for financial support varied with some finding this process burdensome.

3. Training and qualifications

There have been a number of issues in terms of learner placements during the pandemic and as such we wanted to understand the impact this has had on training and completion of qualifications.

Despite learning providers reporting significant issues with learner placements, settings on the whole reported positive learning and development opportunities during the pandemic. Many settings and umbrella organisations reported an increase in the uptake of online training.

4. Impact on staffing

There was concern that closures due to lockdown restrictions could result in staffing issues in the sector, we therefore spoke to providers about this. A number of settings described issues with staffing and some concerns for ongoing sustainability. However, those who took part were complimentary

about the Furlough scheme and other financial help that had been offered to maintain their services.

5. Future requirements

It was important to understand what support the sector may need moving forward. Therefore, we asked those who took part how they saw the next 6-12 months for them. Whilst most were upbeat and positive about the way forward, many noted they would like to be seen as professionals in line with other parts of the children's workforce e.g. education.

Introduction

This report describes research carried out by Social Care Wales and Social Care Institute for Excellence for the Welsh Government during February and March 2021.

The aim of the research was to hold a series of National Conversations with early years and childcare providers across the nation to better understand the impact of Covid-19 restrictions over the past year and how they saw the future and needs of their sector over the next 12 months. The Conversations were recorded and transcribed, and thematic analysis using MAXQDA software, was used to identify recurrent themes.

Sixteen Conversations were held with 114 people across Wales who represented:

Nursery providers	10
Childminders	23
Out of School Childcare	7
Open Access Provision (including LA staff)	26
Cylchoedd meithrin	3
Playgroups	3
Umbrella organisations	42

We held Conversations with individuals and groups of between 2 and 20 people and everyone had an opportunity to speak about their experiences. Those we had Conversations with included:

- After school, breakfast, and wraparound childcare providers, including school holiday clubs
- Child minders
- Clybiau Plant Cymru Kids' Clubs (CPCKC)
- Cylchoedd Meithrin

- Early Years Wales
- Local authority EYCC managers
- Mudiad Meithrin
- National Day Nurseries Association Cymru (NDNA)
- Nursery owners and managers
- Nursery workers
- Open access playworkers
- Play Wales
- Open access playworkers and play development staff
- Preschool playgroups
- Professional Association for Childcare and Early Years (PACEY Cymru)

As we used virtual platforms such as Zoom or Teams, we were able to bring groups together from all over Wales. All participants were invited to contribute in Welsh and English. All, except two of the Conversations were conducted in English.

We are grateful to the contributors for giving up their time and sharing their experiences with us at this stressful time. We hope this report represents their experiences.

Objectives

The objectives of the Conversations were:

- To understand how providers are coping with the impact of the pandemic
- To understand the impact of Covid-19 restrictions on early years training and qualifications
- To understand where, how and what business advice and support has been accessed
- To inform policy and planning in the sector post pandemic.

Focus questions

The research focused on 5 main questions:

1. How have you supported workers' wellbeing throughout the pandemic?
2. What has been your experience of applying for Covid-19 business support?

3. What has been the impact of Covid-19 restrictions on training and qualifications?
4. What has been the impact of Covid-19 on staffing?
5. How do you see the next 6 to 12 months for your service?

The findings to these questions are presented in the report under the following headings:

- Wellbeing and morale
- Business support
- Training and qualifications
- Impact on staffing
- Future requirements

Not all these questions applied to every conversation, for example local authority employees had no experience of business support, but for the most part the Conversations covered all the topics comprehensively.

Wellbeing and morale

The Conversations were aimed at determining the wellbeing support for workers during the pandemic, however although this was prevalent in the Conversations, many also cited the wellbeing of the children with whom they work as an issue/concern for them.

“Most of our staff just tend to have worried more about our most vulnerable children”
(Open Access Playworker)

Above all, working with children was itself a source of wellbeing that came across in all the Conversations. This is a highly motivated workforce, and it was clear that their dedication has been an important motivator for them. They reported that they enjoyed being with children and missed them if their services had to close. One child minder pointed out how lonely she would have been without the children she cared for and their families *“A lifesaver for me. Live on my own. My son lives away. Divorced, so being able to still go to work, massive for me”*.

Mudiad Meithrin noted how there was concern for jobs and this was hugely affecting wellbeing of staff. They have provided free online health and wellbeing sessions for members. This was consistent with the other umbrella organisations.

Managers helped their staff to realise the importance of their work. To an extent they hid their own feelings to support their staff *“You do panic, but I just think as a team for us then we would sort of, not hide that from the girls, but just turn it positively and say, 'It's okay because look, we're doing this'”*. Another said, *“It is very much a family feel within our team, and we just all support each other”*.

Early Years Wales reported how early on providers were consciously thinking about their staff wellbeing and this helped them consider who to put on furlough. They were considering those of their staff who they knew to be vulnerable and made logical but human decisions. Staff wellbeing played a big part in those decisions.

Despite this dedication, some participants in these Conversations felt that they were not appreciated officially, especially when compared with the education sector. These workers sometimes felt that they were not defined as essential workers themselves. Whilst this may not have been the case in terms of guidance issued, their perceptions caused them some concern. One playworker reflected comments that were heard in all the other Conversations: *“The majority of the messaging has been around what a fantastic job education, teachers, teaching assistants have done. They’ve just felt that they’ve really been taken for granted, because actually, those playworkers and childcare workers that have worked all the way through have actually been in face-to-face much more than many of the education profession”*.

A nursery manager emphasised her professionalism and reflected on the lack of clarity about the role of childcare: is it social care or education? She felt that if it were defined clearly there would be more respect for childcare as a profession: *“I’ve spent as much on my education as a teacher has spent on their education, but I’m at the same level, I’m Level 6 qualified, which is the same as teaching staff”*.

Another nursery provider said *“The education sector has had similar guidance, but that sector has managed to be supported, sympathised with and generally cared about in compared to our sector. Yes, this is not new news but as patience is growing thin this is definitely affecting the morale of the childcare sector”*. Whether this is a reflection of press and social media interest in schools and teaching through the pandemic or a misplaced sense that the sector is neglected by government, it nonetheless was a theme in the Conversations and needs to be acknowledged.

A childminder expressed eloquently *“we would like to be seen as a professional. We are professional people. We do a professional job. We’re bringing up young little children. We’re teaching them to read. We’re teaching them to write. We’re teaching them to speak, manners. It’s the whole social skills, everything”*, and a private nursery owner said *“we’re not just babysitters. I just personally think that there needs to be a better voice for childcare to highlight everything that we do, to highlight that it isn’t an easy career path.”*

Recommendation 1: The early years and childcare (EYCC) sector would like to be seen as professionals and have parity with other parts of the wider EYCC workforce. Consideration should be given to continuing promotion and support of the Welsh Government’s ambition^[1] to develop a skilled childcare and playwork workforce, which is highly regarded as a profession and recognised for the vital role it plays in supporting children’s development.

On behalf of childminders, a representative from PACEY said it was *“extremely frustrating when during ministerial briefings, for childcare to not be mentioned. The*

Minister would talk about, for example, lateral flow test access for those working in education and childcare, and the word 'childcare' doesn't get mentioned; it's all about education and schools. Then the press release doesn't say it, but hidden away, in the background, is the detail and that doesn't do anything for that esteem of a childcare setting. You want the childcare to have equal parity to education in the ministerial briefing”.

Although Welsh Government has sent letters of thanks and announcements that include the CPEY sector, these messages appear not to have been heard everywhere. One nursery manager however had this rather mixed reflection: *“I think the government have got a lot better now. Initially, childcare was never sort of discussed. We almost felt like we were the Cinderella of education, and I think it has improved. I think that childcare is discussed and childcare is now mentioned, but I also personally find that we sort of, there's maybe a balance. They kind of want to put us in education; we're in social care, but sometimes lots of things for social care we can't access, but we can't access the things that they access in education.*

Recommendation 2. Key stakeholders such as Welsh Government, CWLWM, Social Care Wales, Play Wales and others to build upon the existing communications, including the Deputy Minister's letter and videos of thanks and the #Diolch campaign, to further publicly acknowledge the contribution that this sector has made to making sure childcare and play opportunities has remained available, recognising that many workers have offered support to families and children beyond the remit of everyday childcare throughout a very stressful time.

Morale

“There have been tears. There has been laughter. It's been a tough year.”
(Playworker)

Morale varied across the different settings, with some appearing upbeat, but many feeling low, especially in the more recent lockdown when workers felt that the poor winter weather had added to the restrictions they experienced as workers, not being able to get outdoors with children as much as they wished and not being able to meet with peers for support. Working closely with small children is not a socially distanced occupation and some worried about bringing infection back to their own families, especially child minders who work with children in their own homes.

Low morale was frequently focused on a fear of infection and concerns around obtaining vaccines and PPE. There were differences in the way settings perceived the distribution of PPE. Most had enough, but some felt they might have been left out of the distribution. Similar issues were raised about the distribution of Lateral Flow Tests (LFTs) with one nursery reporting a delivery of hundreds of tests while another had received none. While there was clear Welsh Government guidance on infection control and on who should be prioritised for PPE and infection control, at the same time, strong messages were being delivered in the media and at government briefings which emphasised the dangers of infection and the risks of transmission. It is understandable that childminders expressed fears and confusion about infection. Unlike anyone else in the wider population, they welcomed children into their own homes daily throughout the pandemic. One said, *“We've worked and we've had*

people coming in and out of our house constantly, putting our families at risk constantly, but we can't see our family". A nursery owner expressed similar concerns "I think when you're working with children, trying to support everybody, and you're worried thinking, what am I taking home to my own family?"

Concerns about cleaning

The cleaning required to prevent spread of the virus involved all practitioners in extra work and this affected their wellbeing. They worked longer hours to do a task that was not in their usual remit. A school holiday club owner explained *"I had to employ staff for longer hours than they're used to because we had to have half-an-hour in the morning cleaning, half-an-hour at lunchtime cleaning, half-an-hour in the afternoon just cleaning so that they didn't have any contact with the children during those times"*.

We heard from one nursery owner that *"the cleaning is phenomenal at the moment"*. Usually, settings did it themselves and did not employ cleaners. As one nursery owner pointed out, teachers in school are not doing their own cleaning. This meant extra work hours and sometimes specialist equipment such as costly foggers. There are many sources of advice around cleaning or what to use, some more or less reliable. All were aware of the importance of keeping surfaces and toys clean and using separate equipment for each child. The cleaning chemicals can have adverse effects: *"When we're using the cleaning fluids like the Milton and things like that, it's bleaching our uniforms, so we all started to look very scruffy"*. One setting had bought a fogger but were then told by their Local Authority that these were not believed to be effective, despite a case study from NDNA Cymru. Although advice has been given by Welsh Government³ specifically, through the protective measures guidance⁴, this has not been fully understood. The official advice on cleaning toys, rooms and equipment is simply to use general purpose detergent, hand hot water and paper towels, however, this advice is on page 40 of a 46-page document. It is worth repeating that some settings were using a proprietary bottle sterilizer which bleached toys, equipment, and clothing while others spent large sums on foggers based on a recommendation from the NDNA⁵ although there is little evidence to suggest that these are effective. The instruction about hot water and detergent had not always been heard.

Recommendation 3: Settings need accessible, consistent, easy to understand, evidence-based advice on effective cleaning, using materials that are safe for children, staff, and the environment. Consideration should be given by key stakeholders, including the Welsh Government, to simplifying and repeating

³<https://phw.nhs.wales/services-and-teams/harp/infection-prevention-and-control/guidance/accordians/docs/infection-prevention-and-control-guidance-2019-for-childcare-settings-0-5-years-in-wales-nurseries-childminding-and-playgroups/>

⁴ <https://gov.wales/sites/default/files/pdf-versions/2021/4/5/1619793195/protective-measures-childcare-settings-keep-childcare-safe.pdf>

⁵

https://www.ndna.org.uk/NDNA/Supplies/Fogging_decontamination_Coronavirus_Edge_Protect.aspx

important instructions authoritatively to avoid distracting promotions and misinformation on social media.

Bubbles and relationships with schools

Bubbles (or as the Protective Measures refers to these as ‘consistent contact groups’) were a source of stress to many, especially those who normally worked closely with schools, perhaps providing a service on school premises. A private wraparound childcare provider said *“The bubbles are impossible. I know why they’re there, but it’s just acknowledging that that necessity, is going to kill the sector. Parents will need it, at some point.”*

Keeping children in bubbles was an issue that affected job satisfaction: *“We just felt that all the additional duties and commitments that we had to make to ensure everybody was safe from coronavirus was just removing a little bit of the magic of the playworker way”*.

Playworkers had to adapt their normal way of working, maintaining bubbles, or contacting children via Zoom and this was not their accustomed way of working.

In some cases, it was difficult to maintain bubbles, especially where one school head requested that children be kept in their class bubble at after school club. This was a misunderstanding on the part of that school but is one of the ways the WG guidance suggests grouping children in wrap around provision. This requirement meant that three settings had to close because it led to very low child to staff ratios and so became financially unsustainable. Welsh Government did relax National Minimum Standards during the pandemic (until 30 June 2021) to support settings to open and maintain services, however these isolated requests from schools caused some problems.

Although they are the same, there are perceived differences between the guidance for schools and the guidance for the childcare sector about bubbles, which have adversely affected the sector. It’s understandable that schools wanted to maintain the same standards out of school to avoid the problems caused by isolation, but these were difficult to apply to out of school childcare. *“We had a school who gave their private provider after-school club a set of guidelines if they wanted to reopen, they would have to meet these guidelines. One of them was that the younger children would have to sit around tables for two hours and the older children would have to sit on benches for two hours. They weren’t allowed to run, they weren’t allowed to move about, they had to sit for the two-hour duration of after-school club. So that was just one school, and that’s what they wanted of an after-school club. So, they chose not to open because they said that’s not what we want to provide so they actually have stayed closed so far”* (CPCKC member). This is an example of one school which was not working in line with the guidance on bubbles.

The interests of schools and out of school childcare providers are the same: both want to deliver a service to children at minimal risk as isolation and associated closures affect both settings. Despite communications and assurances from the Welsh Government, the cooperation needed to make this work was not always present on the ground.

Recommendation 4: Some information, including about effective hygiene, schools working safely with childcare providers, and the way the sector is valued, has not been heard by these providers and others they work with to the detriment of wellbeing and financial viability. Communications need higher visibility and greater clarity to reassure the sector. WG should continue to work closely with key stakeholders to ensure messaging is clear.

Vaccine roll-out

Guidance⁶ on who qualified as front-line social care staff for the vaccine and its roll out was issued by Welsh Government. This included childcare workers.

“Staff undertaking social care roles in childcare and education settings will be within the scope of the frontline social care definition where they support children, young people and adults with complex medical needs as per the definition in the guidance. This applies to all childcare and education settings, both in the public and independent sector.”

However, participants still raised issues in terms of understanding and noted perceived anomalies with the delivery of vaccines. All workers that took part in the Conversations would have felt more confident with a dose of the vaccine, but some had received it and others had not. Although the vaccine programme is making excellent progress, variations and misunderstanding of the guidance provided, encouraged feelings of unfairness. This was particularly apparent in Conversations where a mixed group of settings took part.

Due to vaccines and a recent decline in cases and deaths some respondents felt we were through the worst of the pandemic and had a little more optimism. A childminder told us *“I think I'm feeling quite positive. I feel like we're definitely through what I feel is the worst of it. I think a lot of the people I talk to now; they're feeling more positive about everything that's going on, but it could be that the sun's out more these days now. I think everyone got quite down and blue through winter with it being too cold and wet all the time, and you couldn't go out anywhere anyway. I think people are feeling a lot more positive now.”*

Support for children and families

All the workers we spoke to were very focused on supporting the wellbeing of the children they worked with and their families. This was a consistent source of encouragement and purpose for them. Playworkers spoke of becoming concerned about children that they no longer saw even at online play sessions. They had provided a lot of craft packs and food parcels to drop off to vulnerable children in their areas; they made videos to go with these showing crafting activities and recipes to follow. One setting revamped their summer playscheme to support the whole family rather than just children. This helped with social distancing as well as supporting parents.

⁶ <https://gov.wales/frontline-social-care-worker-definition-covid-19-vaccination>

A nursery held online reading sessions and yoga videos for those children at home and sent plants for them to grow at home. In one area the playworkers visited children in their streets dressed as dinosaurs. The staff found their own wellbeing benefited from these visits *“I think the staff got just as much of a boost from that as the families and the children did. We were absolutely making idiots of ourselves, doing the Macarena in the middle of the street”*.

Mudiad Meithrin expressed how *cylchoedd meithrin* were mostly concerned with continuing provision *“when can we open, when can we welcome the children back.”* A number of *cylchoedd* were offering zoom sessions for children and families and posting ideas on Facebook.

Early Years Wales noted that their members had stated that *“workers are going above and beyond what they would normally do”*.

A playwork provider was articulate about the impact that a loss of play opportunities will have on children as they grow up. For them catching up on play will be more important than making up lost academic work. Their values led them to state that *“there's such a concern about education but they're forgetting that [children have] missed out on their fundamental right. It's not just a nicety they've missed out on, they've missed on their fundamental right to play, they've missed out, (on being a child?) and be a child and have all those fun memories that we all look back fondly, that quite often are taken for granted because they were something that just happened maybe 20 years ago. Children's mental health, well-being, confidence, education but not from an educational like sitting down in a classroom, but their own goals, their own interests, everything's been damaged. If you reinstate play, everything will fall into place. If you reinstate education to the detriment of play, the children will still have all those negative impacts, and that's not being recognised at the moment.”*

Sources of wellbeing support

All the participants in our national Conversations had sources of support that they could call on ranging from informal WhatsApp groups to their membership organisations which were all working hard to contact and support all their members. Nonetheless there was a strong sense in these meetings that the sector feels left out, especially compared with the education sector.

Childminders work as individuals from their own homes and therefore lack the support of peers which has not been possible during Covid-19 restrictions. PACEY have been doing “Recovery Calls” to all their child minders since November, partly because they recognised the isolation of being a child minder at a time when there are no toddler groups or other social contact. *“There's usually a burning issue of the month that they need to get off their chest”*. They had also booked the child minders onto a free course called I Matter Too. Other bodies such as the NDNA kept in touch with their membership and arranged forums for them to discuss issues. Settings who worked directly for local authorities were well supported as authorities were checking in with staff they employed directly. Some workers had found support through online courses such as Welsh or Yoga. The sociability of these subjects is helpful to counter isolation. CPCKC also offered their members much needed regular calls:

“you phone up for a quick catch-up and all of a sudden you've got their life story; I just feel they've felt quite alone.”

Recommendation 5: Welsh Government and other key stakeholders to provide continued reassurance and encouragement to childcare professionals that their physical and mental wellbeing are important and valued. Explore options to build on this work, recognising what the CPEY sector has done to support the wellbeing of children and their families/carers.

Business support

Financial support packages

Most had applied for, and received, business support from a range of sources. In most cases this was financial in the shape of grants, loans, government support packages and through the furlough scheme. The financial support received was from HMRC, banks, the Welsh Government, local authorities, and grant making trusts.

Types of financial support mentioned included:

- Bounce Back Loans
- Business rates refunds
- Business Wales
- Childcare Offer for Wales, which continued for a period even though children could not attend
- Childcare Provider Support Grant (CWTCH)
- Economic Resilience Grant
- Flying Start Capital Funding
- Furlough Scheme
- Kick Start Scheme
- Moondance
- NHS Charitable Funds
- Self-employment Income Support Scheme (SEISS)
- Steve Morgan Foundation

Whatever the source of funding, settings were grateful, and in some cases it had made a real difference. Others still had challenges. At the last count in December 2020, CPCKC found that 8% of its members had permanently closed their provision. They had examples of *“really well-managed clubs with lots and lots of numbers that have got fantastic opportunities for the children, up to 80 children a day during the holidays. School won't let them in, they've tried to keep going, but they've closed,*

they've folded". By the time of our conversation at the end of March 2021 they suspected that that proportion of closures would be higher and that there were uncertainties about settings which had relied on furlough and other supports, but which would become unsustainable once these were withdrawn. Since Christmas, 50% of their members had not re-opened. Figures from Care Inspectorate Wales in May 2021 demonstrate that there has been an overall sector service loss of 3% (1% of overall capacity), with 6% of services still temporarily closed. CPCKC note that "Our stats from CIW demonstrate that of the OSC that informed them of closure 28% were still closed. (76 remained closed 200 reopened. This is based on OSC registrations only not the overall picture which takes into account the Day Nurseries (3%) Childminders(15%), and Sessional care(5%)."

One wraparound care provider ran a business which had gone from over £230,000 annual turnover to £20,000. That owner had a Bounce Back Loan with repayments due to start in June. She was uncertain that her business would be open by then and concerned about her ability to start repayments.

There were a lot of small grants available. As a private day nursery provider explained "it's been pretty much a fulltime job for me applying, with being seven settings, not all of them are eligible, but seven settings in three different boroughs, they all have different procedures, different forms, different things that they wanted. I've applied for anything. Anything I've seen, so there were little PPE grants, I've applied for those. There was a little child development grant for young children, I've applied for that. We're talking, like, £50 here, £500 there, and then I have had in the three settings which are open, sustainability funding, but that's always for specific things, if you see what I mean?"

There were gaps in how grants covered needs. A representative of PACEY said they had lobbied the Welsh Government about this and found the response was reasonable, although given the complexity of the situation all needs could not be covered and grants available took a lot of negotiation: "The Welsh government then were very reactive and put another grant scheme in that almost plugged that gap, but that came with its own criteria. Then the one that came in... it came in to plug a gap, but there was still another gap that hadn't been plugged. Then they brought in another grant to plug that gap, so you ended up with three grants running simultaneously, trying to work out which one was the best fit for you really."

Some funding was easy to apply for. However as Early Years Wales noted "our providers have reported mixed experiences, some have found it straight forward, others have really struggled". One nursery manager noted that "I got into the job to support children, not to become an accountant." Mudiad Meithrin echoed these sentiments, noting that "the *cylchoedd* have really relied on us to provide advice and support to them on business support and things like furlough."

For those individuals and settings who were self-employed, but not a limited company, SEISS was described as "a life saver with the self-employment grants. That was brilliant. It was so easy. No massive backlogs, paperwork needed. It was really well organised and really well received."

Advice helped to smooth applications for funding. A Cylch Meithrin noted “*The support packages that have been available to us have been totally appropriate and helpful. I think the information that has been available from Mudiad Meithrin has been timely and well-rounded which has allowed us to access information in a timely manner and respond and adapt quickly*”. Several local authorities were praised for their easy-to-understand support packages. A nursery owner noted how NDNA had provided useful advice to its member nurseries.

Overall PACEY felt that “*it's very positive that there has been that listening ear and that responsiveness to the sector needing more financial support and the circumstances for that support, whether it's having to close short-term or the general impact on their business*”. Early Years Wales noted that the CWTCH and Moondance funding had been well received and welcomed.

On the other hand, several of the grants available had complex criteria to apply, including exclusionary clauses, for example, if a setting had made an insurance claim. There was confusion around grants from the Welsh Government, a nursery owner complained “*the grants - it was a little bit iffy-wiffy [sic]. I claimed it and I got quite a substantial amount on the business continuity grant, but other settings didn't apply for it because the wording was very - it kind of felt as if it disallowed them. Quite a lot of settings didn't claim for it, and then when we're saying, 'Yes, we got it - get in there, claim it,' the money had gone. They've been mopped up on a second grant - I'm not sure what the name of that one was - so they have managed to get something on the second load of grants. Sustainability grants in our area have been quite good, but there's a lot of paperwork needed behind those, a lot of proving your income, proving this, proving that, and then to do all that work to only gain, say, £1,000. £1,000 sounds a lot, but when you're in the hole for £40,000, it's nothing*”.

The work involved in applying and the uncertainty about eligibility put some settings off applying. For example, the Sustainability Grant was criticised by child minders as it seemed they had to commit to remaining in child minding for an ongoing period. PACEY were supporting their members but said “*I think part of that is just down to people just still struggling to understand, is it available to them? Should they be applying for it? Can they apply for it if they've already applied for the SEISS? No matter how much guidance we try to give them, we haven't got a concrete answer for absolutely every individual because everything's very unique depending on their own personal circumstances really*”. PACEY also referred to “*the local authority grant criteria, when they've wanted blood, sweat, and tears for evidence*”.

One respondent described her trouble with a local authority grant “*The first one was fine, and we were able to access that, but the second one, within their terms and conditions they said that if you'd made a claim against your insurance company, that you couldn't apply. However, when we had our network meeting, I found out from three other settings that they were advised by their childcare development officers to apply and have since received the grant. Whereas I was advised not to and have not received it, so I think there's some communication problems between the authority and what different childcare development officers are actually sending out to people as advice. It's really unfair, that is, because when I found out, I contacted the authority, and they said, 'No, you're too late!'*”

Mudiad Meithrin noted that *“many cylchoedd could not access many grants initially so furlough really was a godsend alongside the provision of the 30 hours offer funding.”*

In larger groups the discussion about business support led to sharing of tips and advice about sources of support. For example, a new childminder had signed up with Business Wales to create a website to advertise her service; she'd had no children up to that point but was hopeful that the web site would be a good investment. Several others were going to investigate this support after the conversation.

Spending funds

Some funds are simply to cover the business downturns of the past year like the SEISS and the furlough scheme. Others required proof of particular use. Many settings had obtained grants which they used to enhance outdoor space. Mud kitchens and gazebos were a common purchase. Cleaning equipment was another big spend, although some had failed to get refunded for foggers and the chemicals that go with them. An after-school club provider had spent money on separate packs of play equipment for each child and this was another typical expense for settings.

State of business

Businesses were affected by short and long terms closures, periods of isolation, higher bills, declines in the numbers of children attending, no forward bookings meaning no reliable business pipeline, and in some cases a decision not to run the service at all, as with one village's summer play scheme.

Despite the variety of funding many costs were not covered. The emphasis on fresh air and ventilation was a financial strain to child minders over the winter months, *“I'm dreading updating my electric and gas bills, because it is just freezing all the time. The kids come wrapped up in loads of layers, and I'm in thermals and a coat, most days, in my living room, because it is freezing”*. That participant had used a grant to buy a fan heater, a capital expense, but the costs of running it were not covered.

In some cases, those who took part noted closures had been much longer than expected *“Well, we thought that we would have a deep clean; we would close over Easter, and we would reopen after Easter. As it was, I kept in very close contact with parents, and we didn't actually reopen until July 7th”*. A provider with a single setting in a rural area was losing £2000 a week in the most recent lockdown. A common complaint related to the timing of payments, such as from the Child Care Offer or the Child Development Fund⁷ leading to serious cashflow issues, although staff pay was always prioritised. An NDNA member said *“Some settings are saying they're having to use Bounce Back Loans; they're having to use other forms of income at an already stretched time because the local authorities are not getting those payments over quick enough”* and gave this example of *“a local setting, it is quite large, they've got a lot of Childcare Offer children - their payment is £20,000 a month, so once it goes past a second wage day, they're now £40,000 in the hole waiting for that money to come in”*.

⁷ <https://gov.wales/support-vulnerable-families-and-children-during-pandemic>

Decline in numbers of children

One of the chief causes of loss of income reported in the Conversations, was a decline in the numbers of children attending. This affected nearly all the providers and settings that we spoke to. PACEY estimated that 62% of their childminder members had seen a decline in numbers. Parents that were out of work were caring for their own children. One childminder explained *“I had two hairdressers. A hairdresser and a beauty therapist. Obviously, they're closed. I think, in all, I've lost four”*. In Llandudno, a pre-school playgroup had lost a lot of children due to the prevalence of the hospitality trade in the area. Those hospitality settings were closed, and staff made redundant or furloughed and therefore did not require their usual childcare arrangements during that period.

One nursery had managed the decline in numbers deliberately to allow staff to work differently *“We only had about 10 or 12 children a day. We could have gone higher, but we wanted to keep the numbers lower to ensure that we could remain COVID secure, and also we were working as a rota. The staff were working across a rota, which enabled us, (because there was no provision for our children at that time), to also support our own families and our own children whilst still playing a key part in the pandemic”*. For others, the loss of places was a more complex issue *“Of the younger children, the pre-schoolers, I've lost days, rather than children. A lot of the parents have cut down the days, because they're working from home, so they still want some childcare, but they don't so much. I may have had children for four or five days, and I've now got them two or three, so everything has shrunk, but because of that, you can't really replace it, because they're still with you some of the week. In some ways, it was worse. I'm glad I didn't lose any of them, but in some ways, it was worse to half lose all of them, because I couldn't fill the places properly.”* Some settings had lost children that they picked up from school. School pickups were made impractical because of staggered end times for different year groups.

A common story across the conversation, was that children are not booked in after Easter. A nursery provider said *“I haven't got as many children signed up for after Easter as I ordinarily would have; I haven't had as many people enquiring for their two-year-old to start. I'm full now but, after Easter, those children will move up to the big room, and history tells me that, ordinarily, we have those spaces then available for the new children after Easter. So, at the moment, I don't have those new children after Easter: that is a worry”*. One childminder who worked with her mother as her assistant had furloughed her *“normally we would have six children, I've literally got two or three, so my mum's on furlough at the minute”*.

Some owners were pessimistic about the sustainability of their provision and feared they may have to close. *“I've just sent an email, now, to one of the clubs, just saying, 'Look, it's looking very unlikely that we will be back, and I do not have any money left to just open and wait and see.' I think there's no point in fobbing them off and saying, 'Maybe next month, maybe next month, maybe next month', because they're as worried as I am about their bills”*.

A potential issue could occur later in 2021 and in 2022 when parents start to return to the workplace and find that the range of childcare provision may not be available. Current Care Inspectorate Wales figures suggest however that, of the settings that

are closed, most are temporarily closed, so these may reopen as restrictions lift and demand increases.

Mudiad Meithrin noted that *“we need to monitor and see how parents working patterns possibly shift and the childcare demand changes....some cylchoedd are resuming normal services, some are saying they have no children registered for September.”*

Families have different needs for childcare ranging from ad hoc child minding to full-time nursery care; many also access school holiday clubs and open access play schemes, while school-aged children attend wraparound care such as playgroups/cylch meithrin, after school and breakfast clubs. It appears from the sample taking part in the Conversations, that some large providers may struggle to return after lockdown and this issue needs urgent attention.

Training and qualifications

Discussions about training and qualifications during Covid-19 restrictions revealed that settings were coping very well and, in many cases, better than previously. However, discussions with training providers indicated there were issues with accessing student placements for those completing level 2 and level 3 qualifications in FE provision. Nearly all training has gone online which busy childcare workers really appreciated. They had taken the opportunity to catch up with all sorts of topics on live courses, YouTube, and webinars outside of their working hours, showing the enthusiasm of the workforce. They really appreciated the fact that they could just log in and didn't have to travel anywhere to upgrade their skills or learn new ones. This is despite further education providers noting difficulties in accessing placement opportunities for their students. From our sample Conversations apprenticeships were continuing. Although Mudiad Meithrin did note that their apprenticeship scheme had slowed due to the cylchoedd being closed.

PACEY were pleased that they had digitised all their training in September 2019, so everything was running smoothly as the pandemic hit. Early Years Wales also noted a shift towards free online training, which members were welcoming. A nursery explained how online courses really worked for them *“Everything then has moved virtually, which I think is almost easier, because it makes the training more accessible. You go home at the end of the day and you can sort out your tea for your family, and then you can log on and sit down and have a couple of hours doing your virtual training, or you can do it during the day. As long as we cover the ratio with the children, they can come in and access virtual courses. I think training in that sense has been easier because it's become much more accessible. I think when you're asking the girls to go out at the end of the day, they've worked all day and then you're asking them to pop out in the evening for a few hours, there isn't such a want to pick up the courses. Whereas now, everybody has been happy to do it, and I would say professional qualifications have been done as well”.*

Mudiad Meithrin also reported an increase in those undertaking online learning with them. Over 2,000 individuals had undertaken training as part of their online offer. This is significantly higher than they would expect carrying out face to face training.

In addition to being convenient for staff to train on the job, it is also permitted as part of the furlough guidance for furloughed staff to continue to undertake training and learning. However, it was evident from the Conversations that this was not known by all the participants. One contributor believed that as *“some of them are furloughed, it's hard to keep contact with them in terms of - they're not even supposed to answer an email because it would be working”*. Based on furlough guidance⁸ this is factually inaccurate as the guidance stipulates that:

“During hours you are on furlough you can:

- take part in training
- volunteer for another employer or organisation or work for another employer, if contractually allowed”

This is another example of how not all messages and guidance being provided were being received and/or understood. Another participant recognised that *“for Level 2s and 3s, they were still allowed to do training while on furlough. Then we could send training to them on furlough because that's the one thing you were allowed to do. You weren't allowed to work, but you could train. So we sent training out to staff during the pandemic”*. A rural after school club had applied for the furlough scheme to allow training for qualifications to continue: *“Two of them are on an apprenticeship for Level 2 and Level 3 in PlayWork, and they've been able to carry that on and be furloughed, but they have to be paid for 10 hours a week, so that they were on the minimum wage, so I had to top it up. I had to pay them 100%”*. To make that top up payment she had used a grant from a trust.

As well as undertaking formal qualifications and statutory training, such as first aid and safeguarding, many people had taken the opportunity to expand their knowledge in many relevant ways. For example, a new childminder said *“I've done quite a few things online just to keep myself busy since I registered! So I've done Advanced Autism Awareness, Intro to British Sign Language, Active Baby and You sessions. A few bits and pieces”*.

From those who took part, professional qualifications appear to be going ahead as usual. Practical observations were harder to organise and may need catching up when social distancing requirements lift, but in the meantime very few delays in gaining Level 2 or 3 qualifications were reported, although further education learning providers are reporting barriers and challenges in obtaining student practice placements. Early Years Wales also noted challenges faced by FE and HEI in obtaining placements and potential practice gaps. They noted that work had taken place to support this such as the Social Care Wales Supporting learner placements during Covid-19 guide,⁹ but that you couldn't force settings to take a student

⁸ <https://www.gov.uk/guidance/check-if-you-could-be-covered-by-the-coronavirus-job-retention-scheme#while-youre-on-furlough>

⁹ <https://socialcare.wales/service-improvement/supporting-learner-placements-during-covid-19>

placement. Nurseries had continued to take on apprentices and one had used the new Kick Start Scheme to train a young person.

Impact on staffing

Covid-19 restrictions have had a considerable impact on staffing in the early years and childcare sector. NDNA have worked with the Education Policy Institute on a year-long study looking at how coronavirus has impacted the early years sector across all 3 Nations. This study has now ended and the final report has been published. The final report¹⁰ highlights the recruitment challenges for the sector with 81% finding it difficult or very difficult to recruit level 2s and 90% finding it difficult or very difficult to recruit level 3's. There will be an important effect on recruitment and staffing for the future due to uncertainty about which staff will return to the sector after being on furlough, together with some who have left and others who will be made redundant after the furlough scheme ends¹¹. The owner of the wraparound care service said, *"If it hadn't been for furlough, I would now be laying people off, now, as of now."* This was echoed by Mudiad Meithrin who also noted that due to furlough most cylchoedd have been able to retain staff. While, CPCKC in contrast, reported one setting *"where practically everybody left to get a more reliable, better paid job in supermarkets and NHS"*.

Early Years Wales noted how playgroups were amongst the last providers to reopening. In the main this is because they are often in community buildings where there may be other conflicting priorities about services being offered or uses.

In addition, there is uncertainty about the employment picture more broadly; if there are many job losses in the future the demand for childcare will decrease further. For child minders who often work on a short term, sometimes ad hoc basis to care for children this will be significant. PACEY reported that *"They want to keep on childminding. They don't want to deregister, and they've got enough work at the moment, but they're very aware that that could just be... It could just go within the next few days even"*.

The open access play sector has invested in developing teams of qualified and experienced workers, who could be called in a casual basis during school holidays. Many of those had also worked in industries that have been closed long term such as in the arts. They are likely to have found other employment and no longer be available to the play sector as before. *"There is a whole bank of casual staff who are playworkers who we haven't been able to use at all for 12 months"*.

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https://www.ndna.org.uk/NDNA/News/Reports_and_surveys/Coronavirus_impact_on_the_early_years_sector_ndna_epi_study.aspx

¹¹ The furlough scheme was extended during the period that we held the Conversations, so this was a more uncertain element at the beginning than later.

There are issues recruiting with some settings having very few applications that met the required criteria, but others getting more suitable candidates. This led to concerns that a surge in demand after the summer would mean turning children away. An after-school club provider said *“We can't take on more children if you haven't got the staff to cover - you've got to have the set ratios. If we have a massive influx in September and we haven't got enough qualified staff to be able to cover those, we can't take the children in, or we're looking at lowering our quality. That's also an issue, obviously”*.

In nurseries there was a concern that *“there's been not a lot of staff movement because everyone's scared of losing their jobs. At the end people might rethink what they want to do or change their job. I think it will be quite an unsettling time in the next six to 12 months”*.

Interestingly Mudiad Meithrin noted the opposite, they have noticed very little movement within the cylchoedd meithrin workforce, however they did report recruiting challenges, particularly due to the requirement for Welsh speakers.

There have been perceptions that guidance has changed frequently and sometimes quite suddenly. It was believed that ratio requirements had been relaxed at one point but then set back, thus affecting the way settings deployed their staff at short notice. These perceptions may not reflect the reality but nonetheless reflect feelings of confusion and worry in the sector about doing the right thing in a stressful period. This has led to uncertainty which at times affects how people work and deliver services. Uncertainty was frequently expressed and needs support to avoid misinformation. For example, a Cylch Meithrin said *“The most difficult part of the pandemic has been working with wrap around care, trying to maintain small bubbles and meet all different schools' needs. We have not found a level of cooperation with many of our schools and trying to maintain small bubbles when staff are required to provide the wrap around service has proved difficult and costly. Our practice has had to change and adapt frequently this past year with very little notice or financial support. I can honestly say that we have had to adapt our operational plan more times this year than we have ever had to in our eleven years of operation”*

Recommendation 6: Recognise the challenges, risks and uncertainty experienced by the sector in terms of staffing and sustainability and work to offer consistent, clear support.

Future requirements

Settings were asked about what might help to support them in the next 6 to 12 months. Moving forward, the EYCC sector say they need to feel more recognised as professionals in line with other parts of the children's workforce. Early Years Wales noted *“hopefully the pre-pandemic work on the 10 year workforce plan can continue... we would hope that the sector value themselves more after the pandemic. Across Wales there's been this feeling that childcare isn't as highly regarded as education.”*

It was also clear from the National Conversations that more needs to be done to communicate clearly with the sector, as many misunderstandings were expressed. Understandably guidance was changing frequently and stakeholders were trying to develop communications during a fast-paced and highly complex situation.

Covid-19 and the associated restrictions will have a profound and lasting impact on this sector. As one EYCC Local Authority manager said, *"I'm very cautious that we don't brush the pandemic under a mat and we just say, 'That was then, this is now'."* Strategic support needs to be made available for the future.

The National Conversations with Early Years, Childcare and Playwork providers and workers revealed a dedicated workforce which regularly placed the needs of children and families above their own. However, as mentioned above, how they felt they were perceived made them feel like a poor relation of the education sector. There was a lack of clarity about whether they were part of the social care workforce or the education workforce. *"I think it needs to be much clearer across the board, where does childcare sit? Where does it sit best? Who is there to support us?"* However, Early Years Wales did note, *"When Julie Morgan [Deputy Minister for Social Services] did the piece to camera, it was really powerful as it was just for Childcare, Playwork and Early Years workers."*

Some businesses need support now, especially those who have been involved with schools such as playwork or after school provision, which most nurseries include with their offer. A large business interviewed for this research suffered unsustainable losses with grants only covering the day to day running costs. If this business fails, 29 settings in 7 regions will close and parents will be left without wraparound care for their children as schools return and the workplace reopens. This will not be the only business in trouble.

Those working with schools have faced unmanageable risks. The owner explained *"So it's breakfast, holiday, wraparound, afterschool, for school age children, predominately run from schools, which is obviously why my sector, school age children, has been hit really hard. The schools are shut. My whole business model has gone to pot."* As another school holiday provider said *"That's all well and good while parents are being told that they can work from home, but that's not going to go on forever. The shops and the restaurants are going to open, and even offices are going to want their people in the office certain amount of the time. It's going to be a lull where it's not needed, but there's going to be a sudden boom of needing childcare places. If they've closed down, no, they won't be there, because it'll be a complete re-setup and all the staff will have moved on to other roles."*

Several settings needed to close temporarily, either because of lack of staff or declining numbers of children attending, or the challenge of managing ratios across changes of staff and numbers of children. For one nursery the decline in the number of children was unsustainable so they permanently closed a setting *"We had 10 redundancies across the two settings that we had, because we lost a lot of provision and we lost our other setting. That was unfortunate"*.

These closures, probably repeated beyond our sample, can be added to a continual historical decline in the number of child minders mentioned by PACEY: *"There's*

quite a large percentage that are looking to deregister that we know are going to add to this continuing decline. This as a real issue that we are facing. Total decline in childminders numbers of 26% since 2015. Decline of 15% in the last three years alone". PACEY also mentioned that there has been an increase in day care provision although it is not clear that this has been the case during the Covid-19 pandemic. Settings which have been associated with schools appear the worst affected, further inquiry should be made in this part of the sector in case there is a risk of losing variety and flexibility in the childcare sector in the future.

Messaging about the way the sector is valued, as well as the practicalities of the job, needs to be clear, prominent and accessible. There were many occasions where participants in this research had not heard the messages communicated by the Welsh Government and felt unsettled as a result.

Conclusion

The findings from this research show that participants worked hard throughout the pandemic to make sure that the children they work with had the best care and experiences despite disruptions and restrictions.

The National Conversations found that the sector wanted to be recognised as a profession and have parity with education and health care staff. This became more acute during the pandemic as they remained open throughout restrictions for the children of key workers and vulnerable families.

Official communications need to be clearer and more robust. The National Conversations found that workers have been left with some misunderstandings and misinformation about working through the pandemic. They had not heard important messages, ranging from how they are valued as a sector to how they should clean their settings.

The situation for the Early Years and Childcare sector currently feels very uncertain. It is impossible to tell whether demand for childcare will increase soon, or whether increased unemployment and continued working from home will lead to a decline in demand. This uncertainty, together with the immediate stresses of the pandemic, have influenced morale, despite the sector's high levels of motivation and dedication to the children they work with.

From the Conversations we held, settings associated with schools have been hit by school closures and by restrictions passed on by schools to prevent spread of the virus. The loss of a considerable proportion of clubs as unsustainable could adversely affect the portfolio of services that parents have relied upon to support their working lives and offer their children the best in play provision.

Recommendations

The main findings from the National Conversations are reflected in the Recommendations below. These are that:

Recommendation 1: The early years and childcare (EYCC) sector would like to be seen as professionals and have parity with other parts of the wider EYCC workforce. Consideration should be given to continuing promotion and support of the Welsh Government's ambition^[1] to develop a skilled childcare and playwork workforce, which is highly regarded as a profession and recognised for the vital role it plays in supporting children's development.

Recommendation 2: Key stakeholders such as Welsh Government, CWLWM, Social Care Wales, Play Wales and others to build upon the existing communications, including the Deputy Minister's letter and videos of thanks and the #Diolch campaign, to further publicly acknowledge the contribution that this sector has made to making sure childcare and playwork services have remained available, recognising that many workers have offered support to families and children beyond the remit of everyday childcare throughout a very stressful time.

Recommendation 3: Settings need accessible, consistent, easy to understand, evidence-based advice on effective cleaning, using materials that are safe for children, staff, and the environment. Consideration should be given by key stakeholders, including the Welsh Government, to simplifying and repeating important instructions authoritatively to avoid distracting promotions and misinformation on social media.

Recommendation 4: Some information, including about effective hygiene, schools working safely with childcare providers, and the way the sector is valued, has not been heard by these providers and others they work with to the detriment of wellbeing and financial viability. Communications need higher visibility and greater clarity to reassure the sector. WG should continue to work closely with key stakeholders to ensure messaging is clear.

Recommendation 5: Welsh Government and other key stakeholders to provide continued reassurance and encouragement to childcare professionals that their physical and mental wellbeing are important and valued. Explore options to build on this work, recognising what the CPEY sector has done to support the wellbeing of children and their families/carers.

Recommendation 6: Recognise the challenges, risks and uncertainty experienced by the sector in terms of staffing and sustainability and work to offer consistent clear support.

Appendix A: Anonymised breakdown of participants

Organisation	County	type of provider	Number of delegates	Date of conversation
PACEY Cymru	All Wales	Childminder umbrella organisation	7	25/02/2021
Childminders Network	North Wales	Childminders	9	01/03/2021
Private playgroup	Conwy	Playgroup	1	01/03/2021
Childminders Network	South Wales	Childminders	13	03/03/2021
Cylch Meithrin	South West Wales	Cylch Methrin	1	18/02/2021
Early years managers hub	Gwynedd, Flintshire, Wrexham, Powys	Day Nurseries, cylch, playgroup, LA Flying Start sessional provision	6	01/03/2021
Independent provider	Wrexham	After school provider	5	
Independent provider	Blaenau Gwent, Bridgend, Cwmbran, Haverfordwest, Porthcawl, RCT, Vale of Glamorgan	Large provider of after school and wraparound care	1	11/03/2021
Open access play Network	All Wales	Open Access Play	26	16/03/2021
NDNA Cymru	All Wales	Nursery providers' umbrella organisation	9	17/03/2021
Private Nursery	RCT	Day care	2	
School holiday club	Bridgend	School holiday play ages 3 - 11	1	22/03/2021
Clybiau Plant Cymru Kids' Clubs	All Wales	Childcare Umbrella organisation and Network of Wraparound care workers	26	26/03/2021
Nursery provider (hospital site)	Cardiff and the Vale	Full Day care	1	24/03/2021
Childminder	Llantwit Major	Childminding	1	24/03/2021
Nursery providers	Conwy and Bridgend	Day Care	2	24/03/2021

Early Years Wales			2	27/05/2021
Mudiad Meithin			1	02/06/2021
Total Participants			114	
Nursery providers	10			
Childminder	23			
OOSC	7			
OAP (including LA staff)	26			
Cylch meithrin	3			
Playgroup	3			
Umbrella orgs	42			
TOTAL Participants	114			