

ACCS Trends in Community
Children's Services Survey
Second Wave
National Report 2013

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Abbreviations

ACCS	Australian Community Children's Services
ACECQA	Australian Children's Education and Care Quality Authority
ASC	After School Care
BSC	Before School Care
DEEWR	Department of Education, Employment and Workplace Relations
ECEC	Early Childhood Education and Care
ECT	Early Childhood Teachers
FDC	Family Day Care
LDC	Long Day Care
MACS	Multifunctional Aboriginal Children's Services
NFP	Not for Profit
NQF	National Quality Framework
OSHC	Outside School Hours Care
TICCSS	Trends in Community Children's Services
VAC	Vacation Care

Executive Summary

The commencement of the National Quality Framework (NQF) on January 1 2012 has produced ground-breaking changes for education and care services. With over one million Australian children currently attending an Early Childhood Education and Care (ECEC) Service,¹ Australian Community Children's Services (ACCS) believes the implementation of the NQF, including the implementation of improved educator child ratios, is already providing better quality outcomes for children and families.

Close to one year into the national reforms, ACCS conducted a second wave of the Trends in Community Children's Services Survey (TICCSS) to hear experiences of children's services across Australia. Over 500 services participated in the survey in October/November 2012, representing all states and territories and Long Day Care (LDC), Outside School Hours Care (OSHC), Family Day Care (FDC), Preschool/kindergarten, In Home Care and Mobile Services.

With the NQS and National Regulations the level of expectation of accountability and skill level has risen across the sector and this is a positive for the outcomes for the children within these services and the early childhood profession.

Respondent

Key findings of TICCSS include:

- Services are integrating the NQF into their operations and practice
- The national average daily fee for LDC was \$77.59
- Over half of services increased their fees in between the two TICCSS waves - the average daily fee increase for LDC was \$2.59
- The new educator child ratios are being met and services are preparing for next introductions due in 2014

Quality improvement is really important for our children and positive progress is being seen to be made with the new reforms. Well done for everyone's efforts.

Respondent

- Services are preparing for the introduction of Early Childhood Teachers (ECT) in 2014
 - The sector is engaged in upskilling the existing workforce with more than one quarter of all employees currently engaged in studying for higher early childhood qualifications.
 - Again, TICCSS shows services across the country are well aware and attuned to the critical and essential education they deliver to Australian children and to the many challenges and opportunities that face the sector.

¹ Child Care in Australia, DEEWR, 2013 available at http://www.mychild.gov.au/documents/docs/Child_Care_In_Australia.pdf

Utilisation and waiting lists

While there has been much media reporting on families withdrawing their children from ECEC services due to prohibitively high fees, services are reporting extremely high rates of utilisation. Close to two thirds (63%) of services reported utilisation at 91-100%.

Long Day Care services again are in the most demand with 85% having a waiting list, with an average list of 51 children.

The waiting time for a place varies from service to service, however the longest waits are for the youngest children, with close to a third (31%) of services having waiting periods longer than a year for a place for a child aged from birth to less than two years old.

Ratios

One of the most discussed areas of the NQF has been the new national minimum ratios of educators to children. TICCSS shows all services are already meeting the ratios introduced at the start of 2012, while 83% of LDC services are already prepared for the next introduction in 2016. Some services have chosen to operate well over the national standards, recognising the relationship between quality and low ratios.

For children aged from birth to less than two years old, all LDC respondents were at least meeting the new national minimum standard of 1:4 educators to child ratio for this age group. Of these, 22% were operating their babies' room at educator:child ratios of 1:3 or better.

For children aged 3-5 the majority of the sector (83%) is already meeting the new standard due in 2016 three years ahead of time, with 72% exceeding it.

Workforce

In my opinion all educators should have a minimum degree qualification and be adequately paid for their work

Respondent

The successful implementation of the NQF depends on having a skilled and qualified workforce.

The TICCSS shows that while 10% of the workforce currently has no qualification, 25% are currently engaged in studying for an early childhood qualification.

Furthermore, in preparation for the 2014 requirement for the employment of Early Childhood Teachers in LDC services, over two thirds of LDC services have either a

four-year or three-year degree qualified teacher.

While TICCSS shows that recruitment can be difficult for many services it is not necessarily a product of the NQF, but rather a product of an under-valued and under-remunerated workforce with poor support pathways into education.

Wider than TICCSS, the undervaluing of the Early Childhood workforce is gathering attention with an equal pay case being submitted to FairWork Australia by United Voice and the Australian Government pledging \$300 million for the Early Years Quality Fund. However both these initiatives are limited in their reach to the sector. The Early Years Quality Fund is only available to select LDC services and the equal pay case, if successful, will depend upon the award educators are paid under.

Fees

While affordability of services for Australian families continues to be on the public and political agenda, TICCSS shows services offering relatively accessible fees with limited increases from May to November 2012. The average LDC fee in Nov 2012 was \$77.59.

NQF

Taken within the same year as the first wave, the second wave of TICCSS does not show significant changes, between the waves, on the impact of the NQF on services. Given the closeness in time to the first wave ACCS believes this indicates that the services are steadily integrating NQF into their operations and practice.

Our Centre is not in crisis, business is good and educators have embraced all the changes extremely well and are competent in EYLF & NQS.

Respondent

Introduction

Children’s services in Australia are close to two years into the eight-year national plan that commenced on 1 January 2012 to significantly improve the education and care provided to children and families. These positive changes support learning and development in the critical early years with skilled and qualified educators, consistent minimum standards across the nation and a robust uniform quality assurance system underpinned by wise frameworks to ensure child centred, reflective practice.

In addition to the reforms under the NQF the ECEC sector have had several high profile developments including:

- The commencement on 1 January 2013 of universal access to 15 hours a week of preschool delivered by a qualified early childhood teacher in the year before school
- Australian Government launch of the Better Schools: Before and After program with \$450 million of funding for 500 schools
- The launch of an equal pay case through FairWork Australia by United Voice
- Injection of \$300 million from the Australian Government in their Early Years Quality Fund to support increased wages for educators in LDC

Table 1: Summary of Early Childhood Education and Care Reforms	
2012	<ul style="list-style-type: none"> • 1:4 educator to child ratios for children aged under two years
2013	<ul style="list-style-type: none"> • Every child to have access to 15 hours/week of preschool delivered by a qualified early childhood teacher in the year before school
2014	<ul style="list-style-type: none"> • All long day care and preschool services to employ a qualified early childhood teacher • Fifty per cent of educators to have, or to be working towards, a Diploma level or higher qualification • All remaining educators to have, or to be working towards, a Certificate III qualification (or equivalent)
2016	<ul style="list-style-type: none"> • 1:11 educator to child ratios for children aged 3-5 years
2020	<ul style="list-style-type: none"> • All long day care and preschool services with 60 children or more to employ a second early childhood teacher, or another suitably qualified leader

ACCS advocates for the right of Australia's children to access quality NFP children's services and welcomes and actively supports the reforms. ACCS recognises that research is vital to track the implementation of the reforms, to ensure the experiences of services are heard, to counter alarmist claims of those who oppose them and to identify gains and real challenges requiring policy attention.

Gap in knowledge

ACCS is acutely aware of the limited sources for information on the experiences of early childhood services in Australia, and, in particular, of NFP services.

Since the last Census of Child Care Services in May 2006, the Australian Government has released sporadic reports on child care statistics.² However the short reports and the census do not distinguish between the NFP children's services and commercial, for-profit services.

The Australian Children's Education and Care Quality Authority (ACECQA) is publishing the results of quality assessments of services by relevant Regulatory Authorities under the NQF; again it does not distinguish commercial, for-profit services from NFP services.

ACCS knows that the experiences of the NFP sector are often very different to their commercial counterparts and believes these NFP voices should be heard. Given the formative change happening in our sector, this data gap is resulting in a lack of understanding of how the NFP sector is responding to the reforms.

Research driven by the NFP sector on the NFP sector, can provide different data on successes and challenges and shine a light on the experiences of these services around Australia.

Early childhood aligned with profit is a gross invasion of children's right to education and care.

Respondent

TICCSS: addressing a gap in knowledge

As the peak body for not for profit children's services, ACCS recognised the gaps in knowledge and with the initial TICCSS in May 2012, commenced an ambitious research agenda to track the experiences of community children's services in Australia. With biannual surveys to the sector in the first year and annual surveys thereafter, TICCSS has monitored the experiences of children's services across Australia in one of its most transformative years. Research focuses have included educator child ratios, utilisation, waiting lists, fees (including increases), experiences in implementing

² <http://deewr.gov.au/australian-government-census-child-care-services-2006-census>
Other reports available here <http://www.mychild.gov.au/pages/ResourcesReports.aspx>

the NQF, existing and emerging vulnerabilities in communities and experiences with regard to recruiting and retaining staff.

Most importantly, with its main audience being NFP children's services, TICCSS sheds a light on the specific experiences of this sector.

Conducted in May/June 2012, the first wave of TICCSS attracted responses from 640 services around Australia. Recognising the significance of the first year of the reforms, the second wave was conducted in October/November 2012 and captured the experiences of over 500 services including the development of Quality Improvement Plans, appointment of Educational Leaders and the commencement of assessments.

Responses in both TICCSS waves were as varied as the ECEC sector, representing all states and territories, a range of service sizes (from 25 places or less to 80 plus places) and a range of metropolitan, regional and remote areas in Australia. The respondents deliver a range of services to meet the needs of Australian families including long day care, before and after school care, kindergarten/preschool, family day care, vacation care, in home care, multi-functional Aboriginal children's services, occasional care and mobile services for rural and remote families.

Responses were from the three main operation models: stand-alone community based (not for profit), large NFP organisations (such as YMCA, Goodstart, and church organisations) and commercial providers. However, reflecting the membership of ACCS, the NFP services, small and large, were the main respondents and the main subjects of this report.

The TICSS is designed to be explorative. The findings, and this report, are intended to be indicative of what is happening in the sector and not representative. ACCS believes it provides vital information to track changes in the sector as government policy brings about the transformation to ensure consistently high quality education and care.

We also anticipate that TICCSS may assist in identifying areas where more extensive research could be conducted.

Demographics

State and Territory Responses

Around the country, ECEC services are delivering essential education and care for Australian families and children.

TICCSS, as the only research that is designed for not for profit children's services specifically, includes comprehensive representation from services all over Australia delivering many types of education and care.

Over 500 services participated in the second wave of TICCSS responding to the survey in October and November 2012. The timing for the second wave was chosen by ACCS to allow services to share their experiences 10 months into the first stage of the implementation of the NQF, the development of their initial Quality Improvement Plans and the commencement of the first of the assessment and ratings visits undertaken by ACECQA.

All states and territories were represented with the largest response from the higher populated states – Victoria and New South Wales. It should be noted that the first wave and second wave surveys attracted different numbers of respondents from State's and Territories. It should also be noted respondents in this second wave may not have participated in the first wave. This research is not intended to track changes in individual services but provides an indicative snapshot at the time of the survey.

	2012 May/June	2012 Oct/Nov
Australian Capital Territory	0.2%	1.8%
New South Wales	28.3%	43%
Northern Territory	0.5%	3.2%
Queensland	21.2%	8.2%
South Australia	6.1%	11.2%
Tasmania	1.5%	0.4%
Victoria	39.8%	28.8%
Western Australia	2.5%	3.4%

Management Types

While TICCSS primary target is not for profit services, some responses indicated they were from commercial, for-profit services.

Key findings include:

- Forty-five per cent of respondents were from stand-alone parent managed services (including school committees/groups, incorporated associations and cooperatives).
- Forty-three per cent of respondents were from a not for profit organisation or local council (i.e. YMCA, local government, church organisation or GoodStart Early Learning).
- The remaining 12% identified as being a commercial company or private owner.

Unless specified otherwise, data in this report includes all management types and service types.

Size of Service

Similar to the first wave, the second wave of TICCSS attracted responses from services of all sizes. Ten per cent of services were very small (less than 25 places), 50% small (26-59 places), 20% large (60-79 places) and 19% very large (80+ places).

While TICCSS included responses from the major services in most states and territories, the majority of the Outside School Hours Care services (OSHC) were from New South Wales and Victoria.³

Geographical Locations

Representing a spread of geographic locations, over two thirds (67%) of respondents were from major cities, 29% from regional Australia and one and a half percent from remote or very remote Australia.⁴

³ Outside School Hours Care includes services that deliver any of the following – Before School Care (BSC), After School Care (ASC) and Vacation Care (VAC).

⁴ Ninety-five per cent of services provided addresses that allowed for coding using the Australian Bureau of Statistics Australian Standard Geographical Classification. Regional Australia includes inner regional and outer regional.

Service Types

Again LDC was the dominant service type in TICCSS, however many respondents delivered more than one service. Of the 59% of services that provided LDC, 35% also provided preschool/kindergarten. See Table 3 for further breakdown.

	2012 May/June	2012 Oct/Nov
Long Day Care (LDC)	53%	59%
Before School Care (BSC)	29%	15%
After School Care (ASC)	35%	19%
Vacation Care (VAC)	25%	12%
Occasional Care (OCC)	6%	7%
Kindergarten/Preschool	29%	40%
Family Day Care (FDC)	5%	7%
In Home Care	1%	1.4%
Multi-functional Aboriginal Children's Services (MACS)	0.3%	0.2%
Mobile Service	1%	2%

⁵ NB: adds to more than 100% as many respondents deliver multiple service types.

Waiting Lists, Utilisation and Ratios

The availability of children services for Australian families is often discussed. TICCSS provides data on service utilisation and waiting lists across the age groups, giving a broad picture of areas in constant demand.

Utilisation

Demonstrating the critical need for ECEC services, more and more services have reported extremely high utilisation rates, with 14% more services reporting 91-100% utilisation in October than had previously been reported in May. 60% of services had high average weekly utilisation (91-100%), 18% had reasonably high (81-90%), while 19% had utilisation at less than 80%.

Consistent with the first wave, LDC has the highest rates of utilisation among services available.

Even though new requirements cost more and take more work to implement they are very badly needed to increase the quality of education and care for all children. Increased ratios and staff qualifications are well worth paying for.

Respondent

Table 4: Average Weekly Utilisation 2012

Utilisation Rate	All Services		LDC		OSHC	
	May/June	Oct/Nov	May/June	Oct/Nov	May/June	Oct/Nov
91-100%	49%	63%	60%	68%	25%	32%
81-90%	22%	18%	23%	17%	23%	26%
71-80%	13%	8%	9%	7%	24%	16%
61-70%	8%	7%	4%	6%	13%	13%
Less than 60%	8%	4%	4%	3%	15%	14%

Waiting Lists

In planning for education and care options for children, many families will experience a wait in finding a place in certain areas and preferred services. Three quarters of all services have a waiting list, in particular LDC services where 85% have waiting lists.

Waiting lists for the youngest children is commonly believed to be the longest. TICCSS shows that on average, services will have 51 children on the waiting list for the 0-2 year old age group. The wait on these lists varies; one third of services reported waiting periods of six to twelve months, 25% one to two years and six per cent longer than two years.

Educator and Child Ratios

One of the most discussed areas of the NQF has been the new national minimum standards for ratios of educators to children. These are bringing in line previously differing ratios from state to state, to provide consistency across the country with the numbers of educators required for children according to age groups.

Contrary to the reports that this area of the NQF is creating problems for services, TICCSS shows services are meeting the ratios already introduced. The majority of services (83%) are already meeting the ratios due for implementation in 2016 and some services have chosen to operate well above the national standards, recognising the relationship between quality and low ratios.

Zero to two year olds

For 0-2 year olds, all LDC respondents were at least meeting the new national minimum standard of 1:4 staff to child ratio for children aged 0-2 years and 22% were operating their babies' room at educator child ratios of 1:3 or better.

Furthermore 10% of LDC services planned to increase their staffing levels in their babies' rooms in the first half of 2013.

Three to five year olds

A national minimum standard of one educator for every 11 children aged 3-5 year olds will apply from 2016. The first wave of TICCSS in May 2012 showed that the sector was already working hard to meet this ratio and there has been further progress. In November 2012, the majority of the sector (83%) was meeting the standard (three years ahead of time), and 72% exceeding it. Furthermore, more than half (53%) are operating at better than 1:10. See Table 5 for further breakdown.

Ratios	2012 May/June	2012 Oct/Nov
Better than 1:10	47%	53%
1:10	20%	24%
1:11	5%	6%
1:12	12%	8%
1:13	1%	1%
1:14	0%	0.0%
1:15	14%	9%

⁶ Please note that due to rounding off, some percentages will not add to 100.

Of the 17% of LDC services that are yet to transition to the new minimum, close to two thirds indicated they were going to make the move before 2015.

School aged children

The NQF introduced a minimum of 1:15 educator child ratios for school age children, however many states had better ratios already in place. Forty-one per of respondents delivering OSHC services operate at the NQF 1:15, with 38% operating at 1:12 or better, including 26% operating at 1:10 or better.

Our Program is running very smoothly due to continuity of staff, low fees and parent support. The new regulations have increased our paper work but we try to focus on keeping our standard of care for the children at a high level and not stress ourselves about paperwork.

Respondent

Workforce

Educators' Qualifications

The first wave of TICCSS provided a comprehensive profile of educators in Australia in relation to their current qualifications and any relevant study they were undertaking. The second wave of TICCSS draws on the experience of more than 5,500 educators. Taken in the same academic year as the first, it shows those initial numbers staying steady, with some small increases. ACCS expects that the next wave of TICCSS will show considerable difference, as many who are currently engaged in studies will have graduated and new students will have commenced with the new academic year.

Our staff, educators and families have embraced the NQF and we have had to make minimal changes because of them. Anything that increases the standard of education and care for all children is valued here. Our relief staff (many of whom are not yet qualified) have enthusiastically undertaken studies.

Respondent

Certificate III and Diploma qualifications

In 2014, 50% of educators in every service are required to have or be working towards a Diploma. Presently across the sector, 35% of educators have a diploma while 12% are currently working towards this qualification.

From 2014, the Certificate III qualification will become the minimum requirement for educators. TICCSS shows that 37% of the workforce has a Certificate III while 7% are working towards one.

Have no qualifications	11%
Have completed a Cert III	37%
Have completed a Cert IV (OSHC)	2%
Have completed a Diploma (including advanced)	35%
Have completed a three year degree	6%
Have completed a four year degree	8%
Have a post graduate qualification	2%

Total % engaged in studying	26%
Working towards a Cert III	7%
Working towards a Cert IV (OSHC)	0.4%
Working towards a Diploma (including advanced	12%
Working towards a three year degree	2%
Working towards a four year degree	4%
Working towards post graduate qualification	1%

Early Childhood Teachers

Ahead of the 2014 requirement for all LDC and preschool services to employ a degree qualified Early Childhood Teacher, 69% of LDC services reported having either at least one educator with a four-year degree or at least one educator with a three-year degree in early childhood education. Upon the completion of the 2012 and 2013 academic year it is believed there will be a greater pool of teachers from which services may recruit.

Furthermore 25% of services reported having at least one educator currently working towards a four-year degree. This could be indicative of educators embracing the professionalisation of their sector and taking up opportunities for higher qualifications.

Recruitment Experiences

Very similar to the last TICCSS, 27% of services have a vacancy for an educator position at the time of responding.

Compared to 73% in the first wave, only 60% of services recruited for an educator in the six months prior to the second wave of TICCSS.

Thirty-two per cent of these recruits were for Certificate III positions, 36% were for Diploma, 16% were for degree level and two per cent for directors/coordinators.

Satisfaction with recent recruitment experiences were similar to earlier in the year with 49% of responses satisfied with the field of applicants who applied for the position, 87% for the successful educator's suitability for the role and 90% satisfied with the educators' qualifications.

Experiences of recruitment for particular position levels were relatively similar to the first wave of TICCSS, however there were slight decreases in the difficulty in recruiting for Certificate III and Diploma positions.

Positions	Very difficult	Moderately difficult	Sometimes difficult	Occasionally difficult	Never difficult
Certificate III	17%	21%	25%	18%	19%
Diploma	40%	24%	18%	12%	5%
Degree	66%	15%	8%	7%	3%
Director/ Coordinator	73%	13%	5%	5%	4%

May/June 2012	Nov/Oct 2012
<ol style="list-style-type: none"> 1. Low wages 2. Applicants are not suitably skilled or qualified 3. Working hours 	<ol style="list-style-type: none"> 1. Applicants are not suitably skilled or qualified 2. Low wages 3. Wage differentials between qualifications and/or different service types

As in the first wave, services were asked to identify the most difficult factors in recruiting. In this second wave of data, there has been a swap in the factors of “low wages” and “applicants not being suitably qualified” - however the difference between the two is not significant.

ACCS believes the change in the third most difficult factor results from services commencing recruitment for ECT positions ahead of the minimum introduction in 2014. This is could be attributed to degree qualified early childhood teachers being able to earn considerably more when working in the preschool or primary school education system.

Professional Development and Support

Similar to the first round of TICCSS, services continue to support their educators’ professional development in various ways. The data suggests the workforce is embracing opportunities to upskill and to participate in on and off site professional development.

More than two thirds of services provide time off, or time in

Rural areas are disadvantaged at obtaining training.

Respondent

lieu, to complete short course, and 86% pay the short course fees.

As well, in recognition of the importance of improving the qualifications of educators already working in the sector, a considerable number of services (40%) provide time off, or time in lieu, to complete longer courses at TAFE, private RTOs or Universities.

Time off or in lieu to complete short courses	68%
Pay fees for short courses	86%
Time off or in lieu to complete long courses at TAFE colleges, private RTOs or University	41%
Pay fees for long courses at Tafe colleges, private RTOs or University	32%
Pay staff for their time to complete placements at other services	24%

Fees

Current Fees

While affordability of services for Australian families continues to be on the public and political agenda, TICCSS shows that services are offering relatively accessible fees with limited increases from May to November 2012 and the average LDC fee in Nov 2012 being \$77.59.

Many services have complex fee structures and breaking down to a daily unit can be difficult. Furthermore, some services (29%) provide nappies as part of their fees and 59% provide meals which increase service operating costs.

Government data released in 2013 shows that there has been a reduction of out-of-pocket costs associated with children’s services fees for Australian families.⁷ For families with a gross income of \$75,000 p.a. and one child in full-time LDC, out-of-pocket costs dropped from 13% in 2004 to 8.4% in 2012. Similarly, for families with a gross income of \$115, 000 p.a., out-of-pocket costs dropped from 11.4% in 2004 to 8.6% in 2012.⁸ Nonetheless, it is worth noting that over both the TICCSS waves financial strain was identified as the most common factor for children’s vulnerability. This more general financial strain experienced by families, could exacerbate the balance between salary and ECEC fees.

Area	LDC Sector
	Nov/Oct
National	\$77.59
South Australia	\$75.86
New South Wales	\$73.93
Victoria	\$82.87

⁷ Out of pocket is defined as the proportion of weekly disposable income that families spend on child care services.

Note that TICCSS does not allow for this kind of analysis as it only sources fees from services.

⁸ Child Care in Australia, DEEWR, 2013, pg 8, available at http://www.mychild.gov.au/documents/docs/Child_Care_In_Australia.pdf

Area	BSC		ASC		VAC	
	May/June	Oct/Nov	May/June	Oct/Nov	May/June	Oct/Nov
National	\$11.90	\$10.62	\$16.43	\$14.98	\$45	\$39.36

Fee Increases

We are trying to provide a service to our school, not make a profit.
Respondent

While fee increases for families continue to get considerable media coverage, just under half of the services actually increased their fees in the six months preceding the survey. The average increase for daily fees for LDC was \$2.59, as tracked between the two waves of TICCSS.

Again the main reason identified for fee increases was the normal rise in cost of living (CPI) with over three three-quarters of services (76%) listing this as number one.

Recognising the need for better wages for educators, increased staff wages was cited as the number two reason (61%) for fee increases, while changes to meet increased minimum regulatory standards was at number three with 37%.

I would like to see a separate additional CCB for children identified as at risk or vulnerable. These children need to be in a caring, learning environment. When the families cannot pay the fees, childcare ceases. This is not in the best interest of the child.
Respondent

Reactions to fee increases

In 4 years our fees have risen nearly \$20 per day and this has not once affected our status of families, nor have we had families leave due to increases.
Respondent

Similar to the first wave of TICSS services were asked to report on how families have reacted to fee increases.

Over half of services (55%) reported no negative reaction to their fee increases, with 55% stating their families did not express frustration, reduce hours, leave the service or say they were under financial stress.

However 36% of services stated families did reduce their hours, 28% stated families

⁹ Please note that the OSHC data is indicative with a reasonable difference in the amount of OSHC services participating in the second wave TICCSS. However the data and the comments from services show that it is a sector that is working hard to deliver accessible services that support families while providing high quality education and care to school aged children.

expressed frustration at increases, 23% stated they were under financial stress and 16% had families leave because of the increase.

At the time of responding (Oct/Nov 2012) close to half of services planned for an increase to fees at the start of 2013.

Table 13: Families Reaction to Fee Increases (all services)	
Families expressed frustration due to the increase	28%
Families said they are under increased financial stress due to the increase	23%
Families leaving your service due to the increase	16%
Families reducing hours/days with your service due to increase	36%
None of the above	55%

National Quality Reforms:

Experiences with the NQF: The First Six Months

Overall, the TICCSS data shows services integrating the NQF into their operations and practice. Less than a year into the first stage of the reforms, 18% of services stated the NQF meant normal business or reduced workload for them.

However, as with many new systems, there were signs of services still adapting to the new reporting requirements with 53% of services stating the NQF had greatly increased their workload and 30% reporting that their workload had slightly increased.

ACCS will continue to conduct TICCSS to monitor the experiences of services as they integrate the NQF into their operations and move through the first round of assessment and ratings. ACCS will continue to inform ACECQA and state and territory regulatory bodies of the issues and challenges identified by services through TICCSS.

As with the first wave, TICCSS asked services to rate their top issues in the previous six months. The top issues were:

1. Increased paper work to meet legal obligations and government regulations (80%)
2. Insufficient paid time to complete tasks (60%)
3. Inability to recruit suitably qualified educators (30%)
4. Educators' reluctance to embrace change (28%)

Interestingly, while increased paper work maintained its number one spot, staff reluctance to embrace change dropped from number two to number four.

We have embraced the Reforms in a positive way and have had to make minimal changes to our service.

Respondent

Workloads have increased because the expectation of commitment within all roles has risen and again this can only benefit the children and their families.

Respondent

Waivers

We have had very few issues as we have chosen to embrace the change rather than be negative about it.

Respondent

Waivers from meeting the *Education and Care Services National Regulations* support services that, for one reason or another, cannot meet some of the new NQF standards. While these are available to all services through an application process with ACECQA, the vast majority (90%) of the sector is meeting the NQF without the need for any waivers.

Ten per cent of services stated they had a waiver from meeting one or more of the standards in the *Education and Care Services Regulations*.

A staff qualification waiver was the most common (60%), followed by educator and child ratio waiver (23%)

One of my major concerns about the rating and assessment is that most services in Victoria seem to be getting "working towards" and contrary to ACECQA protestations, the public see this as meaning "not good enough"

Respondent

Assessments

At the time of TICCSS, assessments had just commenced and not enough services had undergone the assessment to share experiences. However ACECQA is now reporting that more than half of services have completed an assessment and ACCS looks forward to capturing these experiences in the future TICCSS.¹⁰

Even though new requirements cost more and take more work to implement they are very badly needed to increase the quality of education and care for all children. Increased ratios and staff qualifications are well worth paying for.

Respondent

¹⁰ "Children's Services meet and exceed new standards", ACECQA, August 2013. Available at <http://www.acecqa.gov.au/children-s-services-meet-and-exceed-new-standards>

Communities and vulnerabilities

Vulnerable Children

Better connections with other Child and Family Agencies have meant children are identified and partnerships for providing care are developed.

Respondent

ACCS recognises the key role that ECEC services play in Australian children’s safety, health and well-being and the support network services their families’ need.

Having strong connections and relationships with children and families often means that ECEC services are aware of challenges and

vulnerabilities in their communities earlier than targeted child protection services.

ACCS defines vulnerability as children with a range of risk factors that are challenging or affecting their development and learning.

TICCSS asked if services had seen an increase or change to vulnerability in their community. Over future TICCSS, this data will provide a clearer picture of emerging vulnerabilities across Australia and how children’s services support children and their families.

As we are becoming more established and the service providers in our community are becoming aware of our presence, we are having more referrals for children from vulnerable families to be enrolled including those from child protection and newly arrived refugee families.

Respondent

Key Facts

- Eighty-five per cent of services identify as having vulnerable children in their service.
- Nearly half of all services (47%) have only a few vulnerable children, nearly a third (30%) have some and six per cent reported that the vast majority of their children were vulnerable.
- Just over one quarter of services (26%) reported an increase in the number of vulnerable children in their communities over the last six months, while 74% reported no change and three per cent reported a decrease.
- Twenty-three per cent of services noticed a change in the types of vulnerability in their communities.

Our service is located in one of the most vulnerable communities in the state of Victoria. There are increasing levels of domestic violence, increasing gambling and families under financial pressures... we have families that are starting to open up more about their needs.

Respondent

We have a priority of access for children who are vulnerable and have behavioural and learning difficulties so we have a long history of inclusion

Respondent

Consistent with the first wave of TICCSS, the two most common areas of concern identified by services were financial stress and additional needs and behavioural and development issues.

Eight per cent of all services identified financial stress or strain as an issue affecting the vulnerability of children in their services.

Six per cent of services identified some form of additional needs (including developmental, behaviour, autism or undiagnosed conditions) as an issue affecting the vulnerability of children in their service.

We are more familiar with the indicators [of Autism Spectrum Disorder] and seek assistance ASAP. This is a collaborative effort between educators and parents of the child concerned and relevant agencies.

Respondent

The preschool has formed partnerships with local services including the refuge and Aboriginal services. Our fees have been reduced to \$5 per day for ATSI children and families with pension cards. Transport is also provided to pick up and drop off ATSI children and children who would not access our service without transport. This has closed the gap for many families to access preschool. Employment of 3 ATSI Educators has also developed a sense of belonging for families.

Respondent

Methodology and Research Design

Research Aims

The Trends in Community Children's Services Survey aims to answer the following research questions:

1. What changes are occurring in community children's services in fees charged to families, utilisation and waiting lists, educator qualifications, educator child ratios and recruitment?
2. What are the positive impacts and challenges faced by not for profit community children's services in Australia and their families with regard to the implementation of the NQA?
3. What changes are occurring in the profile of children and families presenting, or not presenting, in particular vulnerable children?

Research Design

This research draws on a survey that is open to all services but targeted at NFP children's services. In the first year of the implementation phase of the NQF, ACCS conducted the survey in May/June and then again in November/October in order to get a thorough understanding of how not for profit children's services were experiencing the reforms. While these two waves in the first year have allowed for a thorough understanding of experiences of services there have been limitations to the comparison between waves due to the short time in between.

From 2013 the survey will be conducted annually which will allow for greater tracking data, in particular of workforce qualifications (as an academic year will have past and will allow the capture of data on new graduates and students), fee increases (which traditionally happen at the start of each year).

The survey is a simple electronic questionnaire, open to directors/coordinators from children's services of all types – LDC, OSHC, FDC, IHC, OCC, MACS, preschools etc.

The Trends in Community Children's Services Survey in its current form with the limited resources attached is designed to be explorative and a continual reflective learning process. The findings are designed to be indicative and not representative. The research findings will be able to assist in identifying areas where more extensive research could be conducted.

The research is designed to gather data on the following:

Demographics

- Services types
- Number of licensed places
- Locations
- Management type (NFP organisation, parent/community owned or commercial)
- Utilisation and waiting lists

Workforce

- Percentage of educator vacancies
- Ease/difficulty in recruiting
- Quality of qualifications and applicants
- Support offered for staff professional development

Fees:

- Average fees
- Fee increases (past and predicted)
- Communities reactions to changes in fees

National Quality Reforms:

- Experience with implementation
- Frequency and type of waivers
- Experiences with assessments

Communities and vulnerabilities

- Number of vulnerable families supported through the service
- Changes in vulnerabilities in the community

Data, where possible, is cross-referenced against service types, location (depending on disclosure this may break down to metro, regional and to the *Socio-Economic Indexes for Areas* decile ranking) etc.

Survey Distribution

The Trends in Community Children’s Services Survey Communication Strategy utilises a snowball technique to gather the sample through the ACCS membership base and informal networks and contacts. Email invitations to participate in the survey are circulated through members and contacts requesting them to forward the survey to their contacts.

This is providing a diverse sample for the survey. ACCS strongly believes that given the limitations of the research this technique is the most ideal.

While it is designed and focused on not for profit services, it is open to services from all management types and has attracted some for profit participation.

Evaluation

ACCS has built in an evaluation process after each wave of the Trends in Community Children’s Services Survey. The evaluation focuses on the following points:

1. The uptake of survey participation across states and territories, metro and regional and service types
2. The completion rate of the survey (are services comfortable with answering all questions, does it appear they struggle with some questions in particular)

3. The process of analysis of the survey (can it be more robust and/or streamlined)
4. The dissemination of the report and uptake of the data externally

Current Limitations

Trends in Community Children’s Services Survey findings are framed around an acknowledgement of the limitations of the research methodology.

First and foremost, the findings are indicative of what is happening in the sector but are not necessarily representative of all NFP community services.

Due to snowball technique used by TICCSS to gather a sample, there will always be variables between waves of services and types of services that respond. This can, at times, limit the ability for rich comparison between TICCSS waves.

Given the lack of comparative research ACCS is confident that this indicative data begins to address the considerable data gap that presently exists.

Some service types and regional areas are better connected to the ACCS network. Relying on a snowballing approach to gathering a sample means that some areas of the ECEC sector may not be reached in the initial waves. ACCS is working to ensure that each wave further extends the reach of the awareness and participation in the TICCSS.

If you have any questions regarding to TICCSS methodology or data or ACCS more generally please contact ACCS Secretary at auscss@cccinc.org.au.