

# NOT-FOR-PROFIT EDUCATION AND CARE:

High quality, accessible and resilient

Findings of the 2020/2021 Trends in Community Children's  
Services Survey

May 2021



## Acknowledgements

Australian Community Children's Services (ACCS) gratefully acknowledges and thanks to the following for their contributions, without which this publication would not be possible.

**Community Services and Health Industry Council** who provided the funding for ACCS to conduct this survey and two more waves of the survey between 2017 and 2020

**ACCS members and supporters** throughout Australia who participated and helped distribute the survey

ACCS would also like to gratefully acknowledge and thank ACCS members nationally and all other participants who shared their experiences by completing the survey.

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ACCS would like to thank Professor Susan Irvine from the Queensland University of Technology for generously providing advice as a critical friend during this research, and assisting ACCS to gain ethical approval for this research.

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ISBN 978-0-646-85258-4

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# Contents

Acknowledgements.....	2
Project lead.....	2
Authors.....	2
Critical friend.....	2
Contacts.....	2
Key terms and acronyms.....	6
A word about language.....	6
<b>What is the TICCSS survey?.....</b>	<b>7</b>
<b>Navigating this report.....</b>	<b>9</b>
<b>Key findings.....</b>	<b>11</b>
<b>Not-for-profit services provide higher quality education and care.....</b>	<b>13</b>
What we know: .....	13
What we found: .....	13
NQS ratings .....	14
NQS rating changes.....	15
Quality improvement .....	16
Educator and teacher qualifications.....	21
Early years workforce strategies.....	21
Current qualifications .....	22
Summary of quality outcomes.....	25
<b>Not-for-profit services provide early education &amp; care in communities where the markets may fail.....</b>	<b>26</b>
What we know: .....	26
What we found: .....	26
Accessibility .....	27
Vulnerability .....	28
Waiting lists.....	32
Affordable education and care.....	35
Summary of accessibility measures in TICCSS .....	40
<b>Spotlight on the impact of the COVID-19 pandemic, fires, floods and drought.....</b>	<b>41</b>
Spotlight on the impact of COVID-19 .....	41
Utilisation .....	44
Impact on casual educators.....	46
Supporting children at risk of vulnerability .....	46
<b>Not-for-profit services support their education and care workforce.....</b>	<b>48</b>
What we know: .....	48
What we found: .....	48

Resilient and equipped workforce .....	50
Tenure.....	50
Pay and conditions .....	52
Professional development.....	54
Annual expenditure on staff .....	56
Summary of stability, remuneration and budget allocation to supporting a resilient and equipped workforce .....	58
<b>Spotlight on educational leaders.....</b>	<b>60</b>
The impact of educational leadership on other outcomes .....	63
Summary of impact of educational leadership on ensuring a resilient and equipped workforce .....	66
<b>Not-for-profit services have stronger governance .....</b>	<b>67</b>
What we know: .....	67
What we found: .....	67
<b>Service governance .....</b>	<b>68</b>
Average utilisation.....	68
Recruitment of educators .....	71
Use of casual staff.....	78
Experiences implementing the National Quality Framework.....	78
Highlights.....	78
Issues and concerns .....	81
Perceptions of assessment and rating process.....	83
Summary of service governance.....	88
<b>Appendix A: NQF and other context.....</b>	<b>89</b>
About the National Quality Framework.....	89
National Quality Framework .....	89
Recent sector changes.....	91
Impact of the second early childhood teacher .....	91
COVID-19 .....	91
Impacts of other Federal Government funding and support packages.....	91
<b>Appendix B: Demographics of respondents to 2021 survey.....</b>	<b>95</b>
Respondent demographics.....	95
Location of respondents.....	95
The respondents' service governance model.....	96
Service type .....	97
Children.....	99
Number of approved child places .....	99
Number of child places offered per day .....	99
<b>Appendix C: List of tables/charts .....</b>	<b>101</b>

# Why this report?

Quality early education and care services help to support the healthy brain development and wellbeing of children, giving them some of the vital tools they need to begin a lifelong love of learning.

Australia has a large and varied system for the provision of education and care for children in the years before school, and for children in primary school out of school hours care services (including vacation care and before and after school care). The education and care sector is well regulated, and the qualifications of educators and numbers of staff are mandated under these regulations.

This report centres on research conducted over several years into the provision of early education and care by not-for-profit, community-based entities including local government, parent bodies, and charities. These governance models are far-reaching, supporting a wide cross-section of Australian communities, including communities that experience vulnerability and disadvantage.

Education and care services are rated against a National Quality Standard (NQS) to determine their quality. Evidence shows that over the years, not-for-profit services have consistently been rated as higher quality than for-profit services. This report elaborates on this evidence and demonstrates that supporting the workforce through better conditions, and equipping educational leaders with the resources and time they need, are key ingredients that lead to better quality outcomes for children and families.

This research is longitudinal and looks closely at trends over almost a decade on:

- Educator to child ratios.
- Utilisation.
- Waiting lists.
- Fees, including increases.
- Experiences in implementing the NQF.
- Existing and emerging vulnerabilities in communities.
- Experiences concerning recruiting and retaining staff.

## **Prue Warrilow**

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## Key terms and acronyms

<b>ACCS</b>	Australian Community Children's Services. ACCS is the national peak body for community-based not-for-profit education and care services. It advocates for the right of Australia's children to access quality not-for-profit community-owned education and care. Since 1982, ACCS has advocated for these services, building on the strong history of its predecessor, the National Association of Community Based Children's Services (NACBCS). ACCS is a volunteer-led organisation.
<b>ACECQA</b>	Australian Children's Education and Care Quality Authority
<b>ACCS</b>	Additional Child Care Subsidy
<b>CCCF</b>	Community Child Care Fund
<b>CCS</b>	Child Care Subsidy
<b>CPI</b>	Consumer Price Index
<b>NDIS</b>	National Disability Insurance Scheme
<b>NQF</b>	National Quality Framework
<b>NQS</b>	National Quality Standard
<b>OSHC</b>	Outside School Hours Care
<b>Quintile</b>	Groupings that result when a population is ranked in an order, such as socio-economic advantage or disadvantage and that population is divided into 5 equal groups.
<b>QUT</b>	Queensland University of Technology
<b>Remoteness</b>	This report uses the ASGC (in full) remoteness classification developed by the ABS.
<b>RTO</b>	Registered Training Organisation
<b>TICCSS</b>	Trends in Community Children's Services Survey
<b>VET</b>	Vocational Education and Training

## A word about language

Language changes in many areas of our lives, including children's services. We've shifted from children's services to education and care services, and from community-based to not for profit. Although the survey that informs this report is called *Trends in Community Children's Services Survey*, this report uses the terms **education and care services** and **not-for-profit services**.

# What is the TICCSS survey?

Australia's education and care (EC) system is delivered by a range of services. The governance and ownership of these services vary from not-for-profit to corporate providers, privately owned chains, small family-owned businesses, and services delivered by schools and local government. Not-for-profit EC services are operated as 'for purpose' social enterprises that provide public infrastructure for the long term, and scaffold children's learning across their life course.

Not-for-profit services – including services run by local government, religious organisations, educational institutions and parent associations – operate all types of EC services including centre based services (long day care centres/kindergartens/preschools), mobiles, occasional care, outside school hours care, and home based care such as family day care and in-home care. They can also include emerging models of integrated child and family centres, and flexible, innovative EC models for rural communities and for children and families with additional needs.

**The TICCSS dataset explores trends in quality of care, accessibility and affordability, educator and teacher conditions and entitlements, and the overall impact of public policy including the NQF. This year we also asked about the impact of COVID-19.**

There have been significant public policy changes that have impacted EC services in Australia. The *Trends in Community Children's Services Survey (TICCSS)* is a longitudinal study that began in 2012. Over six waves, it has measured the experiences of not-for-profit services implementing the *National Quality Framework for Education and Care Services*. Australian Community Children's Services (ACCS) supported and continues to support, a rigorous, national quality agenda, which through the National Quality Framework (NQF) provides a national approach to regulation, assessment and quality improvement, which aims to raise the quality of education and care for children in EC services.

ACCS, as the peak body for not-for-profit EC services, devised the TICCSS survey to help track the unique experiences of not-for-profit community education and care across Australia over a period of significant transformation. ACCS believes that research is vital to track the implementation of these reforms, ensuring the experiences of services are recognised, providing identification of the positive outcomes of these changes, as well as illuminating any challenges that require policy attention. ACCS is acutely aware of the limited sources for information on the experiences of EC services and, in particular, of not-for-profit services. The TICCSS dataset sheds a light on trends over almost a decade on:

- The provision of quality care in services.
- How services support accessibility and affordability for all families.
- Teachers' and educators' conditions and entitlements.

- The functional aspects of managing early and middle education and care services.
- The overall impact of policy initiatives such as the NQF.

TICCSS Wave 6 explores the impacts of the COVID-19 pandemic. Throughout the pandemic, EC services have supported child and family wellbeing by providing a safe space, however, they have faced unprecedented impacts on their workforce and their viability. The TICCSS Wave 6 will illuminate the impacts of these issues.

Responses to the TICCSS survey in each wave were as varied as the educator and care sector itself, representing all states and territories, a range of service sizes, from small to very large, a range of metropolitan, regional and remote areas in Australia, and from small stand-alone services to large providers. The respondents deliver a range of services including long day care, outside of school hours care (OSHC), kindergarten/preschool, family day care, occasional care and mobile services for rural and remote families. Details of the demographic profile of respondents to the 2020 survey are provided in Appendix B.

TICCSS is designed to be explorative and findings are intended to be indicative, not representative, of what is happening in the sector. The findings from TICCSS provide vital information to track government policy changes in the sector targeted to continuously improving education and care for children. They may also assist in identifying areas where more extensive research could be conducted.

2017, 2019 and 2020 surveys received ethics approval from the Queensland University of Technology (QUT) Human Research Ethics Committee.

Data for each wave of TICCSS has been collected through Survey Monkey. Distribution utilised a snowball technique to gather the sample through ACCS membership and informal networks. Email and social media invitations to participate in the survey are circulated through members and contacts, requesting them to forward the survey to their networks.

Table 1. TICCSS survey waves

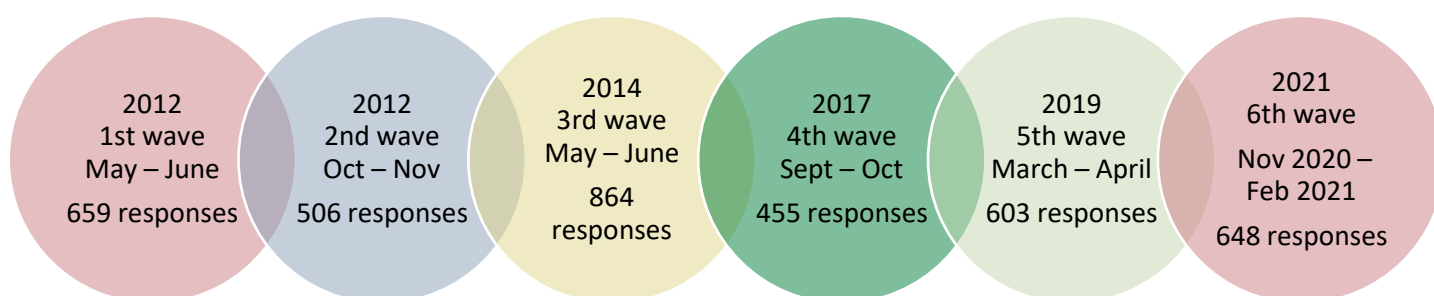


Table notes: Concurrent with the 2017 survey were three other industry surveys. This may have impacted response rates.



# Navigating this report

This report is divided into four sections, each presenting evidence around key areas of experience of the National Quality Framework (NQF) and two special spotlight sections:

**Quality** – this section presents evidence around quality improvement that not-for-profit education and care services have achieved since the implementation of the NQF. Education and care services are assessed and rated by their state and territory regulatory authority against the *National Quality Standard (NQS)*, a nationally consistent standard that measures services' standard of education and care provided to children and families. The NQS measures structural factors, such as educator to child ratios and qualifications of educators, as well as the quality of educational programs, service policies and observed relationships. This report presents evidence about changes in services' reported ratings and compares these to the national averages, collated by the independent national authority that assists governments in administering the NQF, the Australian Children's Education and Care Quality Authority (ACECQA). This section also highlights evidence from questions asked about educator to child ratios and the qualifications of primary contact staff in the TICCSS survey.

**Accessibility** – this section provides an overview of how not-for-profit education and care services support families and communities to access their services. Education and care services play an important role in supporting Australian children's safety, health, wellbeing, education and care. Accessible care is enabled through a range of intersecting factors including government subsidies, service supply, affordability and cultural safety. This section highlights evidence around the accessibility of services in regards to fee changes and waiting lists, as well as observations from services on how families experiencing vulnerability access their programs and funding in response to policy changes.

**Spotlight: the impact of the COVID-19 pandemic, fires, floods and drought** – the unprecedented impacts of the events of 2020 disrupted many services and had impacts on service revenue, educators, community and families. This section examines the experiences of respondents as they faced these dramatic events and asked about their hopes for recovery. It also examines the impact on service utilisation, before, during and after the peak of the pandemic and the impact on casual workers, and supporting children at risk of vulnerability.

**Resilient and equipped workforce** – the sector's progress under the National Quality Agenda is contingent upon the Agenda's demonstrated commitment to the educators and early childhood teachers that staff education and care services. This commitment is demonstrated in data around tenure, pay and conditions, and workload requirements. This section of the report explores the role of the educational leader and time allocated to educators in this role, to develop programs and provide pedagogical leadership.

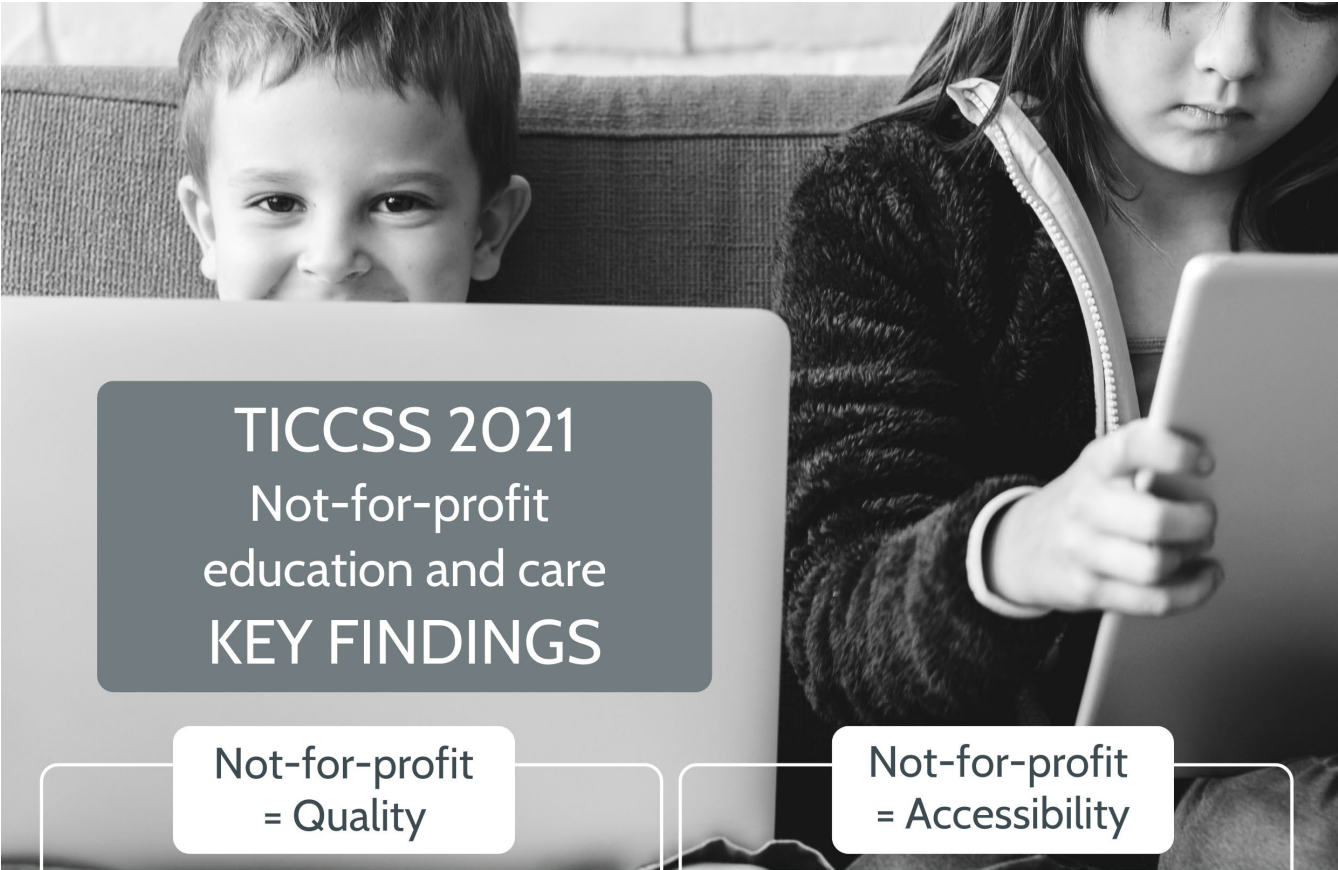
**Spotlight: Educational leaders** – Under the NQF, every education and care service must, by law, appoint an educational leader to lead the development and implementation of educational programs in the service. Educational leaders are a special focus of the 2019

TICCSS survey. This spotlight uncovers the support that educational leaders receive from services and cross analyses the profile of educational leaders against service quality outcomes, to enable us to see the impact of support for this important role on quality outcomes.

**Service governance** – Management and governance of education and care services to achieve high quality standards is challenging. The TICCSS survey has gathered information on service managers' experiences of recruiting suitably qualified staff, key highlights and challenges across the year of implementing the service's planned quality improvements, regulatory change, government policy changes and undergoing Assessment and Rating against the NQS.







## TICCSS 2021 Not-for-profit education and care KEY FINDINGS

### Not-for-profit = Quality

Not-for-profit education and care services are more likely to achieve Exceeding and Excellent ratings than the national averages in 2014, 2017, 2019 and 2021.

48% of not-for-profit services have more educators per child than legally required across all age groups.

Not-for-profit services employ more qualified educators since the introduction of the NQF. In 2021, more educators held diplomas (40%) or four-year early childhood degrees (10%) compared to 2012 (34% and 8%).

### Educational Leaders

Educational Leaders in not-for-profit education and care services are well supported and are allocated 3+ hours a week to do this role. Not-for-profit services ensure that these allocated hours are not just allocated but used, with 81% reporting that they were always or often used.

Research using TICCSS data show links between educational leadership and rates of tenure stability in services and may support achieving a higher NQS rating.

### Not-for-profit = Accessibility

Not-for-profit education and care services support children and families experiencing vulnerability. In 2021, 87% of services provided care for children in vulnerable circumstances - an increase since 2012 (81%).

Over half (56%) of not-for-profit services did not increase their fees in 2021. This is a sharp increase from the rate in 2019 (19%). The majority of those that increased their fees (39%), raised them by less than 5%.

Waiting lists in 2021 were lower than they have ever been since 2012. Over half (58%) of respondents had waiting lists. This is a decline from 67% in 2014, 70% in 2017 and 63% in 2019.



Advocating nationally for the right of Australia's children to access quality, not for profit, community children's services

## Not-for-profit = A resilient and equipped workforce

Not-for-profit education and care services experience less staff turnover. Two-thirds (66%) of teachers and educators have been in their not-for-profit service for over 3 years compared to just one-third (34%) of staff in all Australian services.

Over two-thirds (65%) of not-for-profit education and care services provided pay and conditions for teachers and educators above their relevant award. This proportion has been consistent since 2014.

The majority of community operated services provided a range of professional development options for teachers and educators. Of those that did, 82% provided PD at the services and 85% paid PD costs. 81% of services allocated over 70% of their budget to total staffing costs.

## 2020 impacts on services

Over half of services saw impacts on enrolments (52%), which partly explains why 45% of services chose to waive families' fees to mitigate this effect. Over a third (37%) had families defer their start dates and a third (32%) experienced fewer families on their waiting lists.

There were also impacts on staffing. A third of services needed to reduce staff hours (32%), one in four services needed to ask their staff to access leave (27%). One in ten services needed to lay off staff (10%).

Prior to the pandemic almost half of services (47%) had high utilisation. During the peak of the pandemic, (August 2020) only 19% of services experienced this. Sadly, at the time of the survey, high utilisation rates had still not returned to normal, with only 43% of services reporting high utilisation again.

Over half of TICCIS respondents employed more casual staff members than before the pandemic (54%). However, services were also more likely to offer fewer hours than prior to the pandemic (55%).

## Not-for-profit = Strong governance

Not-for-profit services experienced a high degree of operational stress due to the events of 2020.

Over a third of services (35%) had staff vacancies in 2021. This is higher than in all previous surveys. Workforce stressors were also demonstrated in services' topmost concerns. In 2021, there was an increase in services that were concerned about their inability to recruit suitably qualified teachers and educators (33%). However, their topmost concerns have been similar since 2014, the most prominent being the increased paperwork to meet legal obligations and government regulations.

Service utilisation decreased during the COVID-19 pandemic. In 2021, 77% of not-for-profit education and care services reported utilisation rates above 71% – the rate widely considered the minimum for service viability. This was lower than the rate in 2019 (83%). Many services reported that additional government funding supported their ongoing viability, however, not all services were eligible.

## 2020 impacts on families & children

Participants were asked if, over the past 12 months, they noticed an increase in specific issues being experienced by children and families.

Most frequently, services reported that there had been an increase in financial stress (45%) and mental health challenges (34%). 17% of services reported an increase in the numbers of families who needed to access Additional Child Care Subsidy or other funding support for fees.

Sadly, one in five services reported that they had seen an increase in domestic and family violence (18%), and one in ten reported observing an increase in out-of-home-care (10%) and child abuse and neglect (9%).

Over half (54%) of respondents were worried about children at their service because of the experiences they had had in 2020. Of these, most respondents were worried about children expressing heightened anxiety or stress (79%), half were worried about children transitioning to school next year who would have benefited from more time in early learning (50%).

# Quality

## Not-for-profit services provide higher quality education and care

### What we know:

- Not-for-profit provision of education and care is high quality provision. 42% of NfP community managed services are *Exceeding the NQS*, while only 18% of for-profit services do. Only 12% of services operated by NfP providers are *Working Towards NQS*, compared to 19% of services operated for profit<sup>1</sup>.
- The quality of education and care is vital for children, particularly in their first five years of life; this is a crucial time for supporting a child's healthy brain development.
- Provision of high quality education and care has a greater positive impact for children from lower socio-economic backgrounds than other children.
- Having more teachers and educators per child and having teachers and educators with higher qualifications are two key factors that most influence quality.
- Participation in nurturing early education environments creates a strong protective factor for children experiencing vulnerability, can reduce the gap in children's developmental outcomes, and improve social equity<sup>2</sup>.

### What we found:

- Not-for-profit services participating in the TICCSS survey rate as highly as other not-for-profit services do.
- Not-for-profit services maintain or improve on their already high ratings.
- Not-for-profit services have higher numbers of teachers and educators than they are legally required to.

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<sup>1</sup> Australian Children's Education and Care Quality Authority (2021), NQF Snapshot Q1 2021, p. 17

<sup>2</sup> Torii, K., Fox, S., & Cloney, D. (2017), Quality is key in early childhood education in Australia, Mitchell Institute Policy Paper No. 01/2017. Mitchell Institute, Melbourne

- Not-for-profit service staff are engaged in further education to improve their qualifications.

## NQS ratings

### Overall ratings

Assessment and rating against the National Quality Standard (NQS) provides a consistent, national measure of quality in EC services. The NQS measures structural factors, such as educator to child ratios and qualifications of educators, the quality of educational programs, service policies, and observed relationships.

**Since 2014, TICCSS respondent services have rated highly in overall quality compared with the national averages for all services as reported by the Australian Children's Education and Care Quality Authority (ACECQA).**

Table 2. Overall NQS ratings, TICCSS respondents and all services as reported by ACECQA

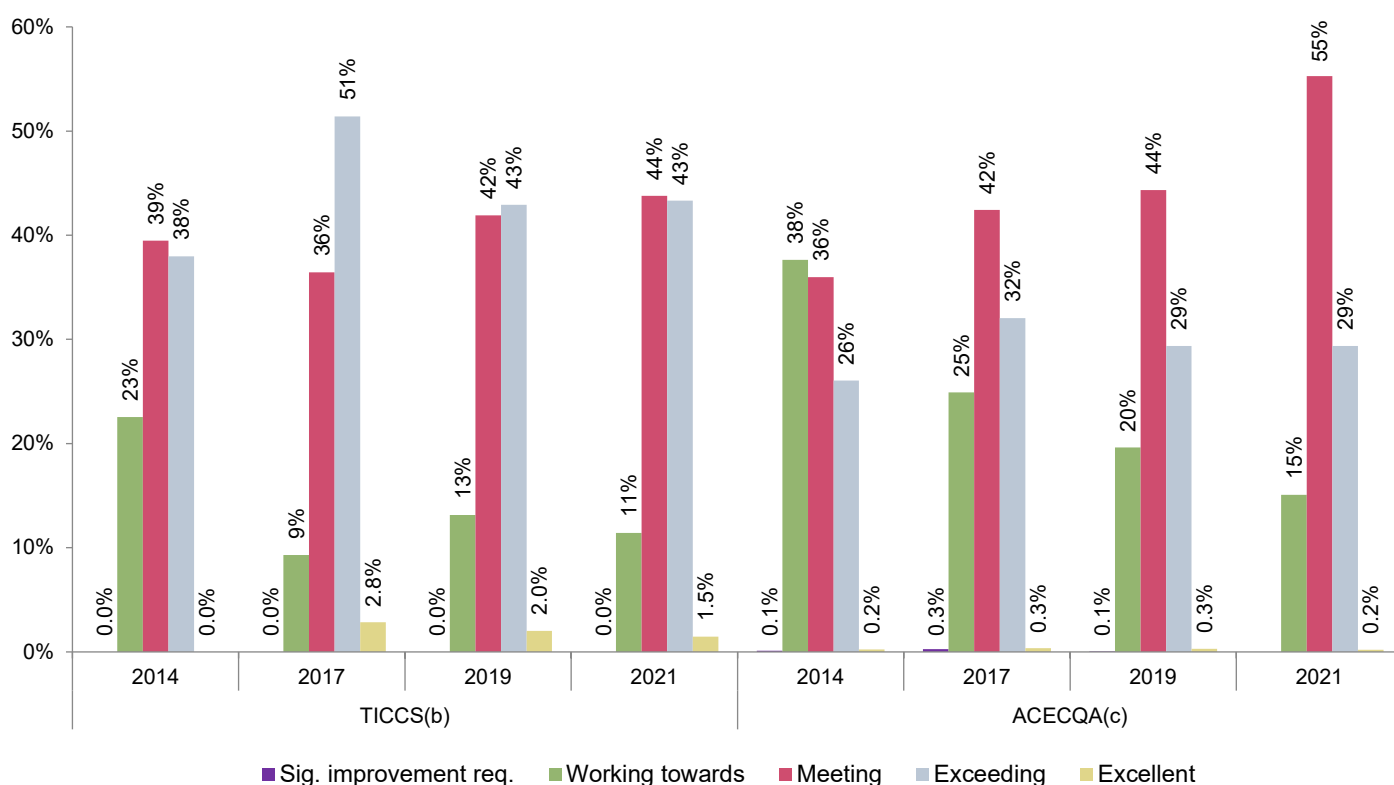


Table notes:

(a) Data for TICCSS refers to reported NQS ratings. Data from ACECQA are administrative data of actual ratings awarded. Data are indicative only and are not directly comparable. TICCSS participants were not asked in the 2012 surveys about their NQS.

(b) Data from TICCSS are of respondents who reported ratings only, totals exclude those who were not yet rated, unsure/cannot comment and not stated.

(c) ACECQA data is from Quarter 2 in 2014, Quarter 3 in 2017, Q1 in 2019, and Q1 in 2021. Totals exclude services rated as Provisional – Not yet assessed.



- Since 2017, the proportion of NfP services who reported they received an *Excellent* rating was higher than the national average (3% compared with 0.3% in 2017, 2% compared with 0.3% in 2019, and 1.5% compared with 0.2% in 2021).
- Since 2014, between one third and one half of respondents to this question in TICCSS reported that their services were rated *Exceeding the NQS* (38% in 2014, 51% in 2017, 43% in 2019, and 43% in 2021). These rates were higher than the overall NQS ratings reported by ACECQA in the same time periods (26%, 32%, 29% and 29% respectively).
- In 2014, 2017, 2019, and 2021 the proportion of services rated *Working Towards* the NQS decreased in both TICCSS and ACECQA data.

2019 changes in the rating system have meant it is harder to achieve an *Excellent* or *Exceeding* rating. In 2021 and 2019, 43% of respondents to this question reported a rating of *Exceeding the NQS*, and 44% in 2021 and 42% in 2019 rated as *Meeting the NQS*. This is a slight change to the 2017 survey when 51% of respondents to this question were rated as *Exceeding* and 36% were rated as *Meeting*.

## NQS rating changes

Maintaining high ratings or reaching a higher rating requires continual quality improvement, with organisations considering whole of service planning, and teachers and educators focusing on improvements in performance over time.

**In 2021, TICCSS respondents provided information about their previous ratings. More than half of respondents had maintained their rating and one quarter had improved their rating.**

Table 3. TICCSS respondent services, previous and current NQS ratings

Current NQS						
Previous NQS		Working Towards	Meeting	Exceeding	Excellent	Awaiting assessment
	Significant Improvement	0%	100%	0%	0%	0%
	Working Towards	20%	64%	14%	0%	2%
	Meeting	11%	61%	27%	1%	1%
	Exceeding	3%	28%	64%	3%	2%
	Excellent	0%	25%	25%	50%	0%

- For those respondents that have had second and subsequent ratings and assessment visits, just over one half (55%) of respondents to this question had maintained the same rating, just over one quarter (28%) had improved their rating, and almost one fifth (18%) had decreased their rating.
- More than three quarters (78%) of respondents to this question who were previously rated as *Working Towards NQS*, had improved their rating in 2021 to either *Meeting* or *Exceeding NQS*, compared with recent ACECQA data with 67% improvement<sup>3</sup>.
- Almost two thirds (61%) of the respondents who were previously rated as *Meeting NQS* maintained this rating, and more than one quarter (28%) improved their rating to *Exceeding NQS* – compared with recent ACECQA data with 17% improvement<sup>4</sup>.
- Almost two thirds (64%) of respondents who were previously rated as *Exceeding NQS* maintained this rating, and 3% improved to *Excellent*.
- Almost four fifths (76%) of respondents to the question about the number of assessment and ratings their service had participated in has been rated two or more times, with 48% two times, 17% three times, 3% four times, and 8% four or more times.

## Quality improvement

**In 2021, TICCSS respondents implemented positive changes across all Quality Areas. Quality Area 1: Educational Program and Practice continues to be the strongest focus for all respondents, with 49% of respondents reporting positive changes in this area.**

Quality Area 1 was also the strongest area of focus in 2019, 2017 and 2014. ACECQA reports that in the first quarter of 2021, Quality Area 1 had the largest proportion of services rated as *Working Towards NQS* (11%) of any quality area<sup>5</sup>.

In 2021, there was an increase in services reporting a focus on Quality Area 2 from 33% in 2019 to 42% in 2021.

In 2021, the proportion of respondents to this question reporting positive changes in all Quality Areas has declined from the previous waves in 2019, 2017 and 2014. Perhaps because the NQS is so deeply embedded in practice that it is now considered business as usual.

When asked to comment further, some respondents noted the opportunity COVID had created – with fewer children attending they had available time to review systems, policies

<sup>3</sup> Australian Children's Education and Care Quality Authority (2021), NQF Snapshot Q1 2021, p. 14

<sup>4</sup> Australian Children's Education and Care Quality Authority (2021), NQF Snapshot Q1 2021, p. 14

<sup>5</sup> Australian Children's Education and Care Quality Authority (2021), NQF Snapshot Q1 2021, p. 18



and practice. Others noted further embedding of *Quality Improvement Plans* into practices and maintaining momentum through regular meetings and processes.

“We have used the time during COVID to up-date our systems within management, to help streamline things for staff and families”.

**“More time for Personal Development (PD) and reflective practice meant that we could go deeper in thinking about how to include children voices in more areas of our program. More educators had time to learn about policy development, the Reconciliation Action Plan (RAP) and other programs we are involved in”.**

*“At the start of 2021, we had a director change. We changed our whole program structure (monthly to weekly) which has made the program timelier, and better at meeting the children's goals. We have gotten better at reflection. The QIP is being used throughout the centre more”.*

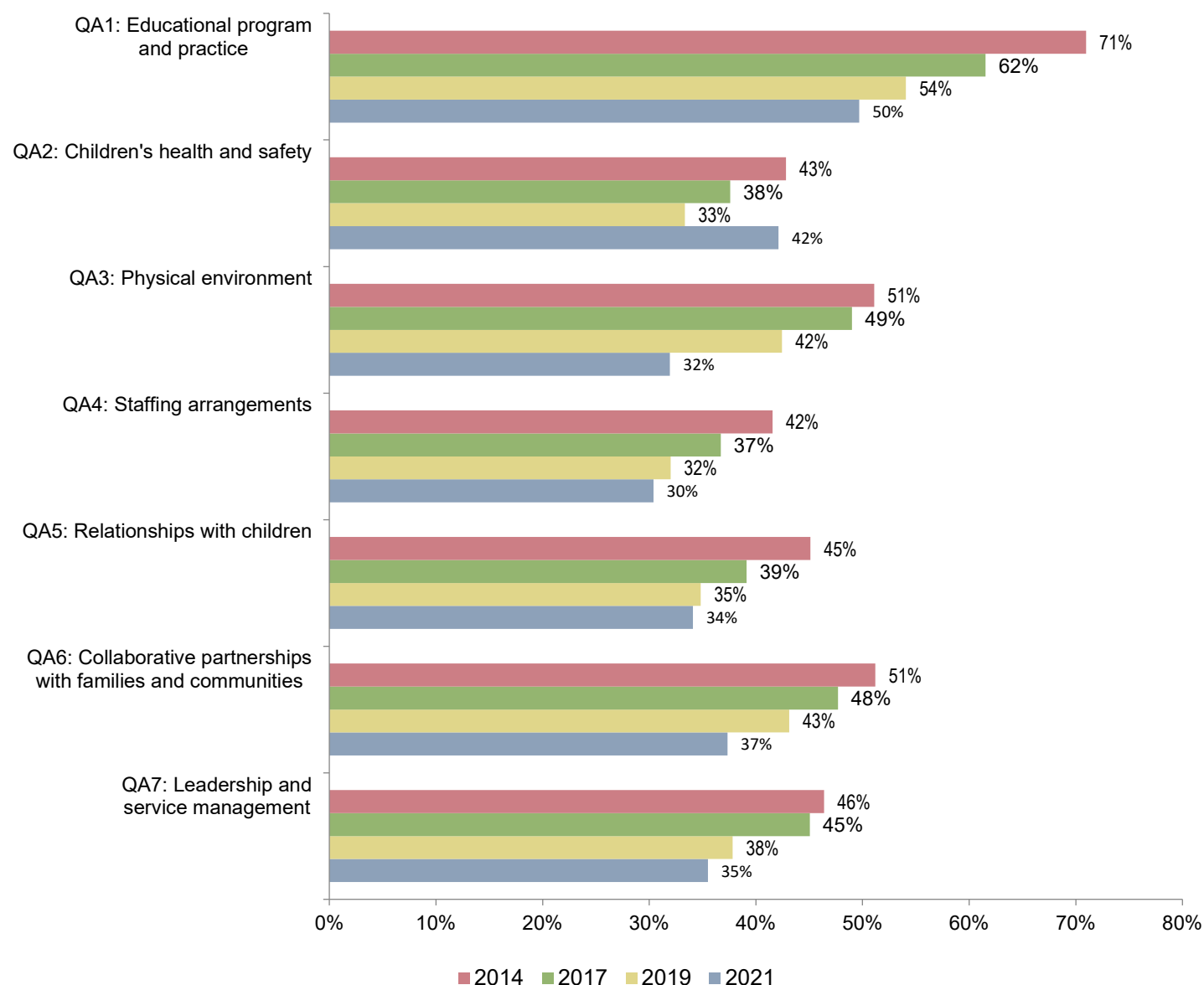
*“It is a continual process, and monthly team meetings provide opportunities to maintain a momentum as these are listed in our meeting agenda”.*

*“The service has a strong commitment to continuous quality improvement, and quite often find the QA's are entwined, and positive changes flow from one area to another”.*



The following table shows the Quality Areas in which respondents to this question had implemented positive changes over the past 12 months this question was not asked in either 2012 survey waves):

Table 4. Quality Areas respondents had implemented positive changes in ratios



Educator to child ratio is one of the key structural components of quality in education and care services. Improved ratios linked with higher staff qualifications and smaller group sizes are associated with better child outcomes<sup>6</sup>.

<sup>6</sup> Centre for Community Child Health (2013), Policy Brief: Assessing the quality of early childhood education care, p. 2

Table 5. The following table shows the current minimum adult to child ratios for each age group.

Age group	Ratio
Birth to less than 2 years	1:4 in all jurisdictions
2 years to less than 3 years	1:5 in all jurisdictions except VIC 1:4 in VIC
3 years to 5 years (not at school)	1:11 in ACT, NT, QLD, SA and VIC 1:10 in NSW, TAS and WA 2:25 in TAS for children attending a preschool program
Primary school age children	1:15 in all jurisdictions except ACT and WA 1:11 in ACT 1:13 (or 1:10 if kindergarten children are in attendance) in WA

Source: ACECQA (2020) *Educator to child ratios*, <https://www.acecqa.gov.au/nqf/educator-to-child-ratios>

In 2021, 48% of respondent services operated at a better ratio than legally required in their state and territory. The following two tables show the rates of educator to child ratio, by age grouping, and by jurisdictions with the same legal requirements.

Note that, in some cases, this may have been supported by Inclusion Support Funding which provides funding towards maintaining a higher ratio of educators to children when the group includes children with additional support needs.

Table 6. Educator to child ratios by age group, children aged from birth to 5 years, 2021

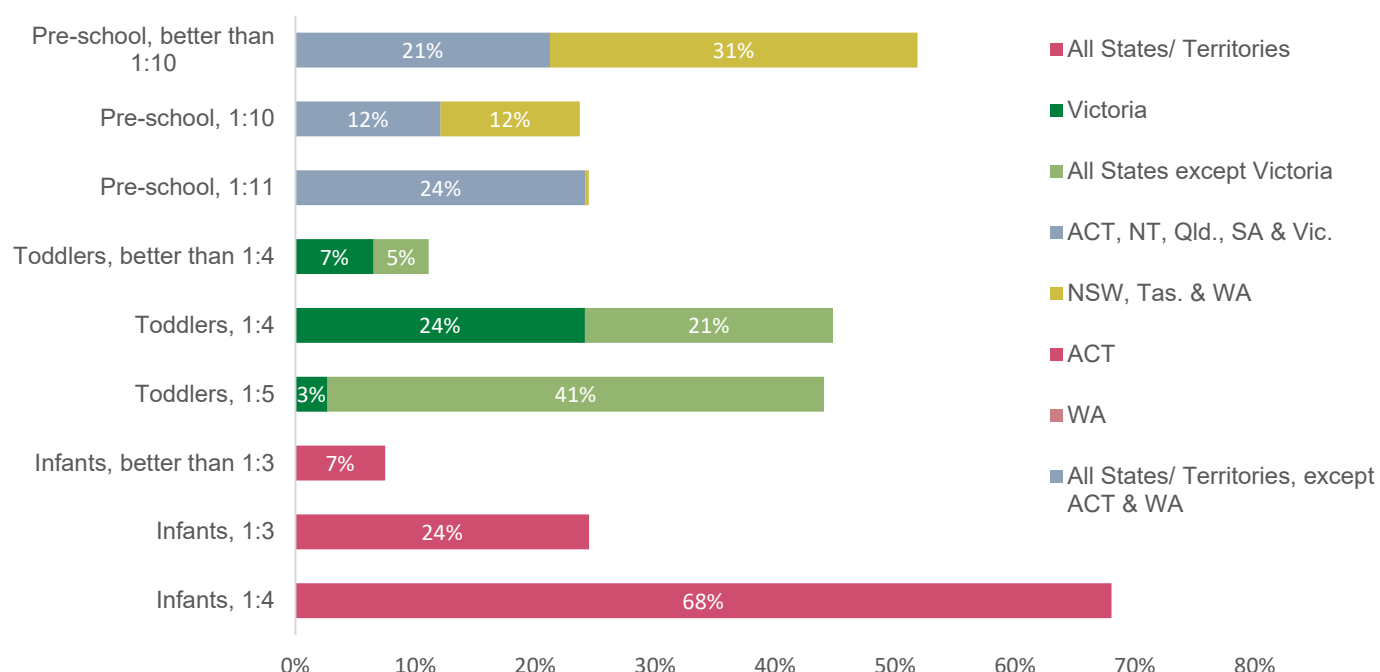


Table notes:

(a) Proportions are calculated from the total of responses for that age group.

(b) "Infants" refers to children aged from birth to 18 months/ 2 years; "Toddlers" refers to children aged from 18 months/ 2 years to 3 years of age; and "Preschool" refers to children aged from 3 to 5 years.

## Children aged from birth to 18 months/less than two years

Respondents continue to provide good staffing levels, with all respondents meeting or exceeding the required ratio of educators for infants. Just over two thirds (164, 68%) of respondents to this question operated with the prescribed ratios of one educator for every four children. The remainder exceeded the mandatory requirements; 24% had a ratio of 1:3 and 7% had a ratio better than 1:3.

## Children aged 2 to 3 years

In 2021, just over one quarter of respondents (32%) were operating at a ratio better than they were required to:

- Of the services that were required to provide a ratio of 1 educator to 5 children, 62% operated at the required ratio and 38% had ratios better than required.
- In Victoria, where services are required to operate at a ratio of 1:4, 80% operated at the required ratio and 20% had ratios that were better than required.

## Children aged 3 to 5 years

In 2021, 56% (463) of respondents to this question were operating with ratios better than required.

## Primary school-aged children

The current prescribed ratio for primary school-age children varies across jurisdictions:

- Over half of respondents (56%) had ratios better than required.
- Under half (80, 38%) operated at a ratio of 1:15.
- Of those respondents who operated with a ratio of 1:13 or 1:11 most were not from Western Australia or the ACT, jurisdictions that operate with these ratios.

Table 7. Educator to child ratio, primary school-aged children, 2021

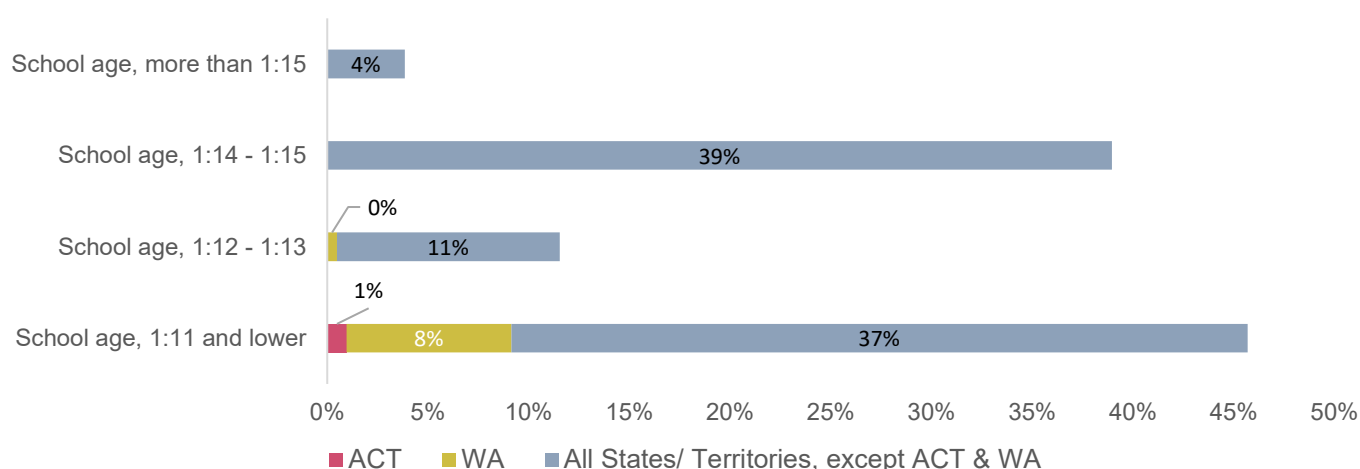


Table notes:

Percentages are calculated from total responses for school aged education and care ratios.

## Educator and teacher qualifications

Raising the qualification levels and improving the ratios of teachers and educators working with children were key elements to improving education and care outcomes for children under the NQF. Mandating minimum qualifications of teachers and educators, along with strategies to enhance access to relevant professional development, was implemented to improve qualification levels across the sector.

All educators working in EC services for children younger than school-age must have (or be working towards) a minimum Certificate III qualification. Diploma-qualified educators and degree-qualified early childhood teachers are also required, and the numbers of these teachers and educators are dependent on the ages and numbers of children attending a service.

This section of the report analyses the experience of respondents in recruiting and retaining skilled and qualified educators. It provides a profile of teachers and educators employed and the challenges related to the recruitment and retention of these teachers and educators.

## Early years workforce strategies

Recruitment and retention of appropriately qualified and experienced early childhood teachers and educators is a critical issue. There are current and predicted future shortages of qualified staff. Data gathered by ACECQA shows that:

- The sector is expected to grow by 22% for preschools and 13% for child care services before 2024.
- In line with sector growth, a 20% increase in workforce will be required, with an additional 39,000 educators required by 2023 including 9000 degree qualified early childhood teachers.
- Our workforce is much more mobile, with educators and teachers having an average experience of 7.4 years, and an average tenure at one service of 3.6 years.
- There is a declining supply of teachers and educators coming through the sector:
  - Only 41% of the early childhood teachers complete their degree compared with 53% of those studying primary and secondary higher education.
  - 60% of those studying vocational NQF approved qualifications complete their courses.
  - In the period 2015 to 2018/2019, there has been a 13.3% decline in early childhood teacher enrolments and a 4.2% decline in vocational NQF approved qualifications enrolments<sup>7</sup>.

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<sup>7</sup> <http://snapshots.acecqa.gov.au/workforcedata/index.html>, accessed 20 May 2021



ACECQA has oversight of a current workforce review that will result in a Ten Year National Children's Education and Care Strategy that will be considered by national sector stakeholders, jurisdictional representatives and Education Ministers in the second half of 2021.

## Current qualifications

Survey respondents were asked to identify qualifications held by staff currently employed and working directly with children. These qualifications ranged from certificate III to postgraduate diplomas or degrees.

**In 2021, of the 8,037 teachers and educators employed by respondent services, only 3% (213) of educators (employed by 68 respondents) held no relevant early or middle childhood qualifications, and 11% (856, employed by 307 respondents) were working towards relevant early or middle childhood qualifications.**

Over time, the qualifications of services have increased. This reflects the intent of the NQF. The following table shows the qualifications of all teachers and educators employed by respondents:

Table 8. Current qualifications of teachers and educators 2012 to 2021

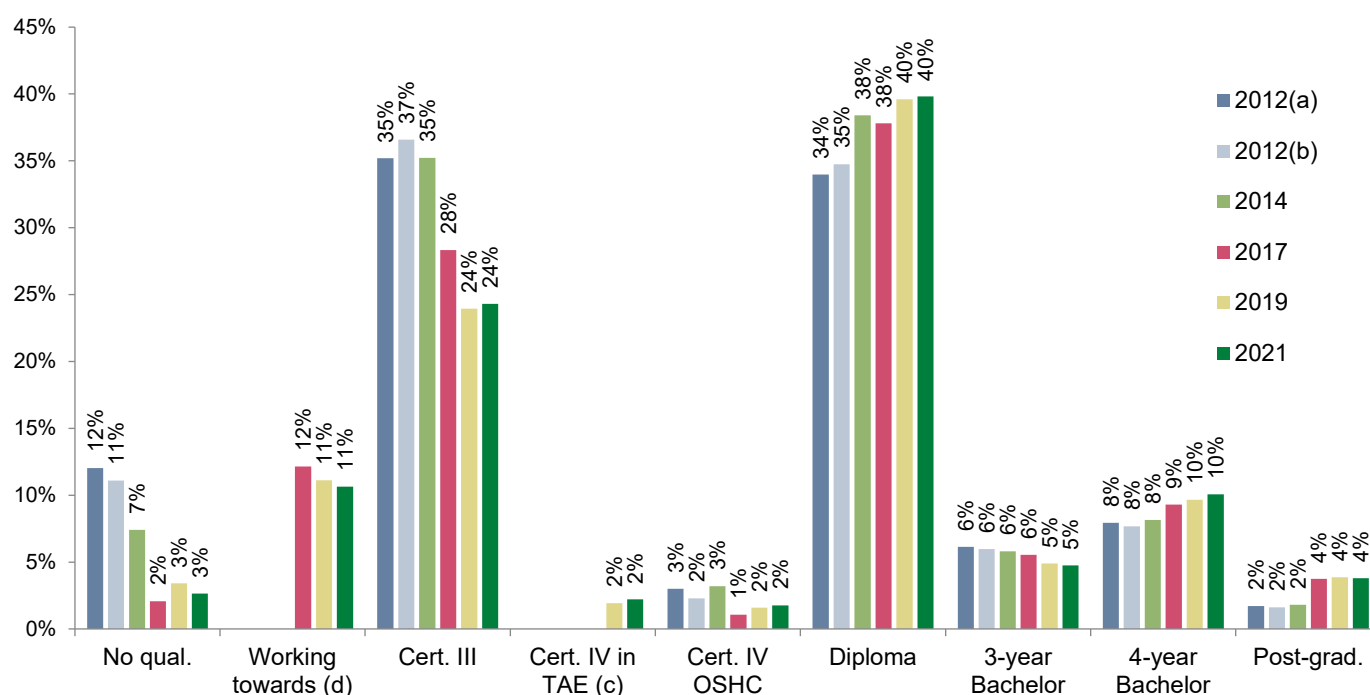


Table notes:

(a) Data are from TICCSS 2012 – wave 1.

(b) Data are from TICCSS 2012 – wave 2.

(c) Question option 'have completed a certificate IV (training and assessment)' commenced in 2019.

(d) Question option 'are working towards a qualification' commenced in 2017.

(e) Data for certificate IV OSHC include educators who have completed any approved certificate IV courses prior to 2019.

Over the six waves of TICCSS there has been a gradual increase in the employment of more highly-qualified teachers and educators.

- The proportion of educators with no qualifications decreased from 12% of educators in 2012, to 2% in 2017, and 3% in 2021.
- More educators now hold diplomas (40%) or four-year early childhood degrees (10%), compared with those in the 1st wave of 2012 (34% and 8% respectively).
- In the 2021 survey, 97% of staff working with children had relevant early or middle childhood qualifications.

## Degree-qualified early childhood teachers

Degree-qualified teachers are the highest mandated qualified staff to be employed in EC settings. Early childhood teachers generally lead service pedagogy and practice using their higher education qualifications to support vocationally trained educators.

The availability of early childhood teachers has been particularly concerning with demand outstripping supply in many areas.

While this is a small sample, responses from TICCSS show that there is an ongoing demand for degree-qualified early childhood teachers. This corresponds with wider sector commentary about an adequate pipeline for degree-qualified early childhood teachers now and into the future.

The current *National Regulations* require degree-qualified early childhood teachers to be employed in centre based day care or kindergarten/preschool for some or all of the time that a service operates.

**In 2021, at least 1132 early childhood teachers (including teaching positions that were vacant at the time of the survey) were employed in respondent services.**

These early childhood teachers worked in:

- Long day care – 450+
- Services that provided preschool/kindergarten – 461+
- Outside school hours care – 147+
- Occasional child care – 50+
- Family day care – 20+
- Mobile education and care – 4+

Some respondents may provide more than one service type, so an early childhood teacher may be counted more than once by a respondent.

## Upskilling to higher qualifications

The survey shows that the NQF has been highly successful in creating a culture of educators' upskilling to higher qualifications – whether to enable their service to meet minimum qualification requirements under the NQF, or to build professional skills and capacity of the individual educator and the service in which they work.

Respondents were asked about educators who were working towards higher qualifications. This includes educators who had no qualifications and those who were raising their qualification levels. Respondents employed a total of 8,442 teachers and educators.

### **In 2021, 13% (1,046) of teachers and educators employed by respondent services were upskilling to higher qualifications.**

The following table shows the qualifications towards which these teachers and educators were upskilling:

Table 9. Educators enrolled in further study by qualification, 2012 – 2021

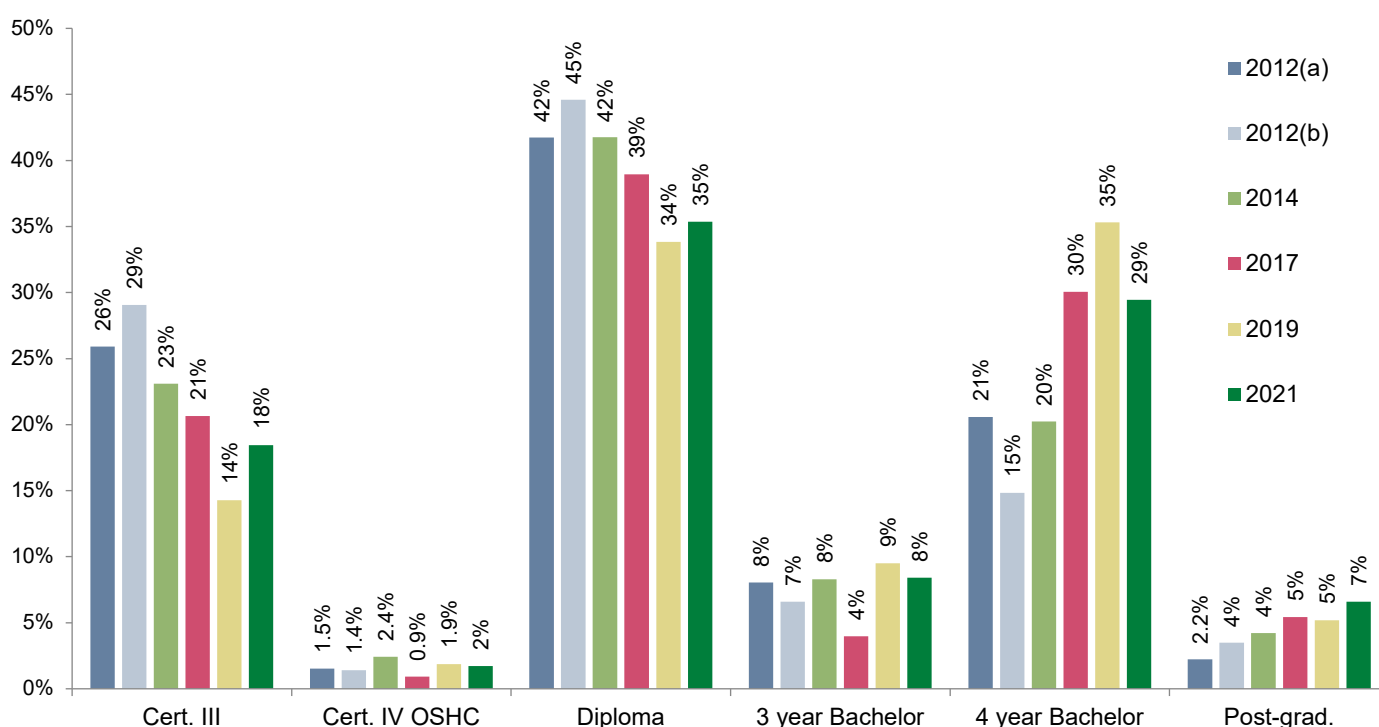


Table notes:

(a) Data are from TICCSS 2012 – wave 1.

(b) Data are from TICCSS 2012 – wave 2.

In 2021, there is increasing interest in up-skilling to certificate III and diploma qualifications, more than there was in the 2019 survey, however proportionally less staff are upskilling to 3



or four-year early childhood degrees than in 2019. This may reflect the impact of the early childhood sector workforce shortage with existing educators opting to upskill to other qualifications. It may also reflect the impact of COVID-19, with anecdotal information indicating that some teachers and educators opted not to enrol in formal qualifications during this period with universities only providing online options.

## Summary of quality outcomes

TICCSS respondents have achieved a high rate of key quality indicators which enable them to provide high quality care for children of all ages. In 2014, 2017, 2019 and 2021 TICCSS respondents reported high rates of achieving *Exceeding NQS* (38%, 51%, 43% and 43% respectively). These rates were higher than the NQS ratings reported by ACECQA for all services within the same periods (26%, 32%, 29% and 29% respectively).

Proportionally, more NfP respondents maintained or improved their NQS ratings compared to the ACECQA national average; 78% had improved from *Working Towards NQS* compared to 67% ACECQA national average, 27% from *Meeting to Exceeding NQS* compared to 17% ACECQA national average.

Across all services, from those that care for infants to those caring for school-aged children, 40% of TICCSS services were operating at better ratios than those prescribed under the relevant State or Territory regulations. This indicates that many services understand the importance of better child: staff ratios for improving educational outcomes for young children.

In the 2021 survey, nearly all teachers and educators had relevant early or middle childhood qualifications.

Qualifications of educators are linked to better quality care and long term development of children. Action towards a National Workforce Strategy will ensure qualification standards such as these are maintained by all services.

# Accessibility

**Not-for-profit services provide early education and care in communities where the markets may fail – such as in communities experiencing disadvantage**

## What we know:

- The impact of high quality care on children from communities with an increased risk of disadvantage, is greater than for children from more advantaged communities. Having access to early education and care helps to minimise disadvantage, not just at school, but throughout a child's life course.
- When a system for the provision of education and care is not universal, it is children who are experiencing the most disadvantage who are least likely to access care.
- We know that there is a smaller proportion of for-profit services in lower socio-economic areas and a higher proportion in higher socio-economic areas.
- It is more expensive to provide education and care for children aged less than 2-years because of the need for better educator to child ratios, resulting in higher staffing costs for this age group.

## What we found:

- Almost all not-for-profit services participating in the TICCSS survey provide education and care for children in vulnerable circumstances.
- Waiting lists for children in not-for-profit services are dropping and children are staying on them for shorter periods – except for infants/toddlers under 2.
- Demand for the care of babies in not-for-profit services remains high. The market has not met the demand for baby places.

- Families in not-for-profit services in the TICCSS survey were understanding about fee rises.

## Accessibility

Education and care services play an important role in supporting Australian children's safety, health, and wellbeing. Accessible education and care is enabled through a range of intersecting factors including government subsidies, service supply, affordability, cultural safety, and child safeguarding. Education and care services traditionally provide universal access to children following The Department of Education, Skills and Employment recommendation that asks services to consider prioritising "children who are at risk of serious abuse or neglect, a child of a sole parent who satisfies, or parents who both satisfy, the activity test through paid employment"<sup>8</sup>.

There are also targeted programs such as the Inclusion Support Program, and various state/territory programs that assist children and families from a broad range of backgrounds to access and participate in education and care.

At a Federal level, affordability is supported through the Child Care Subsidy, and a separate funding system providing universal access (600 hours per year) for all children in the year before school.

## Access to care

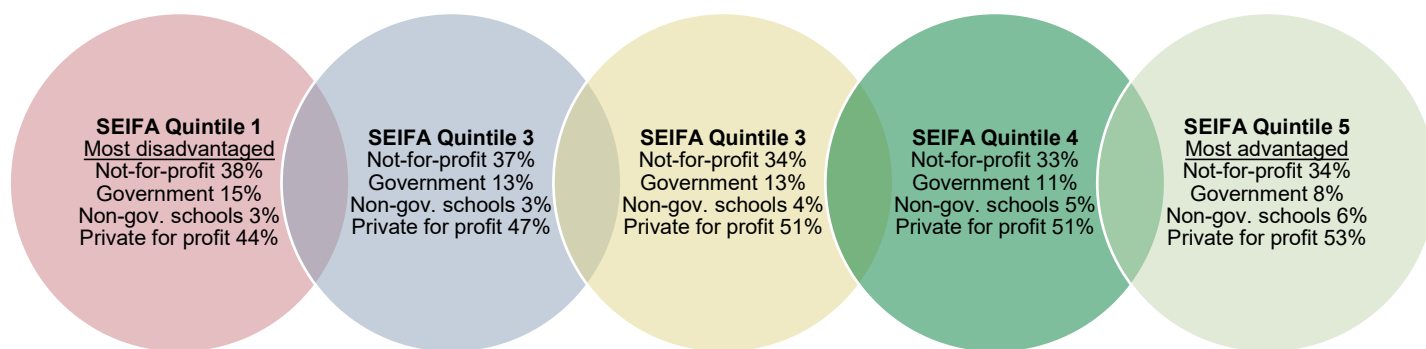
Not-for-profit education and care services have traditionally had strong connections to the community, with many service providers being aware of those families who may be experiencing vulnerability earlier than child protection services. These services provide a safe entry point for families and children and can provide support and resources for early intervention, child safeguarding and risk reduction.

The Socio-Economic Indexes for Areas (SEIFA) Index of Relative Socio-Economic Advantage and Disadvantage (IRSAD) is used by the Australian Bureau of Statistics (ABS) to classify services by the level of relative socio-economic advantage and disadvantage of their local area. In 2019 SEIFA was used by ACECQA as a proxy measure to identify services that were more or less likely to educate and care for children from disadvantaged backgrounds. This report shows that as socio-economic disadvantage decreased, the proportion of private for-profit services increased. Conversely, as socio-economic disadvantage increased the proportion of not-for-profit and government-operated services increased<sup>9</sup>.

<sup>8</sup> Department of Education, Skills and Employment (2019), Child Care Provider Handbook, p. 51

<sup>9</sup> ACECQA (2020), Occasional Paper 7: Quality ratings by socio-economic status of areas, <https://www.acecqa.gov.au/sites/default/files/2020-06/OccasionalPaper7.pdf>

Table 10. Proportion of approved services by provider management type and SEIFA quintile



Source: ACECQA (2020), Occasional Paper 7: Quality ratings by socio-economic status, p.14

## Vulnerability

### Children experiencing vulnerability

In all six waves, TICCSS has asked respondents about their perceptions of how many of the children using their services were in vulnerable circumstances, and what changes they have seen in these numbers over the last 12 months.

**In 2021, 87% of respondents indicated that children were attending their service who were in vulnerable circumstances. This has increased since the first wave in 2012 (81%).**

When asked about their impression of changes in these rates (whether there was no change, or there had been an increase or decrease over the previous 12 months), the proportion of respondents who perceived an increase has grown over time from 30% in 2012 (first wave), to 35% in 2014, 37% in 2017, 35% in 2019, and a marked increase in 2021 to 49%. This is no doubt associated with the major events of 2019 and 2020, which included the COVID-19 pandemic, bushfires, drought, and floods which have impacted significantly on child and family well-being.

Services in disadvantaged areas were more likely than those in advantaged areas to report that they had children in vulnerable circumstances at their service. This reinforces research that children in areas that experience greater socio-economic disadvantage will be more likely to experience vulnerability. However, as shown in the graph below, even in the most advantaged areas, services are highly likely to have vulnerable children in their care and need to be linked in with community supports and embed inclusive practices in their program.

Table 11. Impressions of how many children were experiencing vulnerability by SEIFA quintile, 2021

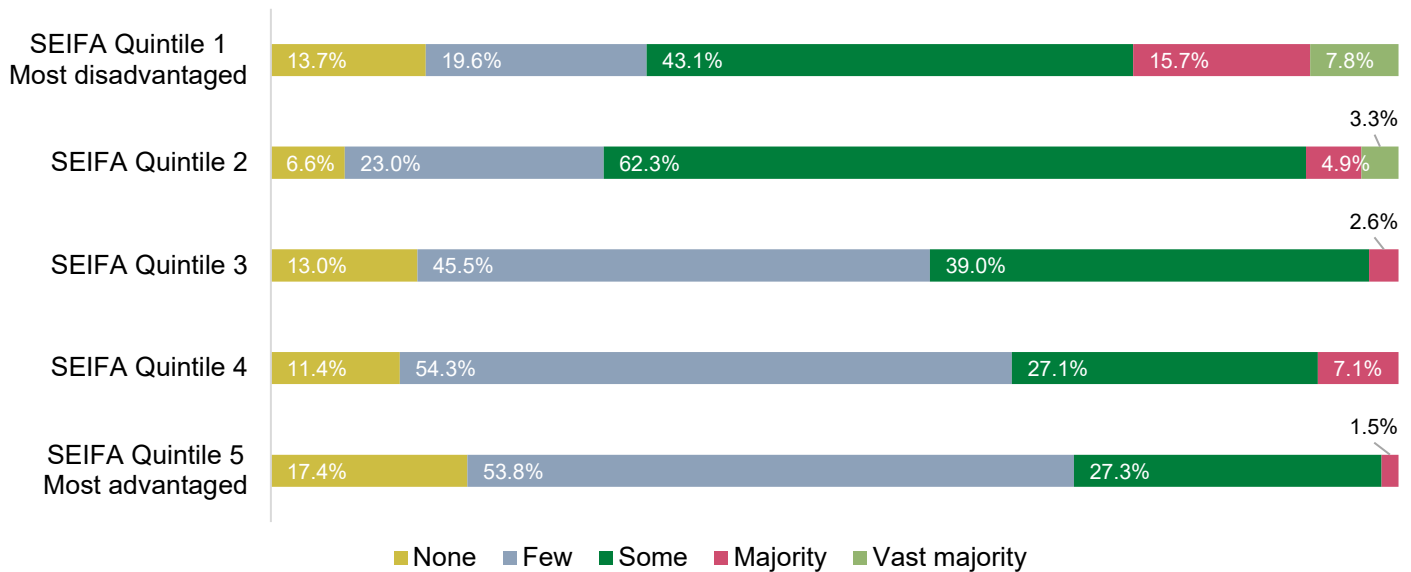


Table notes:

The Socio-Economic Indexes for Areas (SEIFA) Index of Relative Socio-Economic Advantage and Disadvantage (IRSAD) is used by the Australian Bureau of Statistics (ABS) to classify services by the level of relative socio-economic advantage and disadvantage of their local area. SEIFA is used here as a proxy measure to identify services in areas where they are more or less likely to educate and care for children from disadvantaged backgrounds.

The most pressing issues affecting children and families reported by respondents to this question were financial stress (45%), mental health (34%), domestic and family violence (18%), followed by needing to access Additional Child Care Subsidy or other funding support for fees (16%).

Respondents were asked if they were worried about children at their service because of the experiences they had had in 2020; over half (54%) of respondents to this question were worried. Most respondents to this question (79%) were worried about children expressing heightened anxiety or stress, half (50%) were worried about children transitioning to school next year who would have benefited from more time in early learning, 45% were worried about children attending reduced days/hours could benefit from more time in education care, and 44% were worried about children with developmental delays or regression.

## Respondents' insights: Issues facing children and families in vulnerable communities

The TICCSS survey asked respondents to consider what children and families experiencing vulnerability may need to support their participation in education and care services. Many respondents considered free, or more subsidised fees, important to support children experiencing vulnerability and disadvantage access education and care services. Some respondents felt that focusing on timely access to early intervention and prevention and related support services was needed, with some respondents particularly noting significant issues regarding access to families in rural and remote areas. Other respondents felt that connecting Allied Health Professionals with educators in education and care services was

needed so they could collaborate to support children attending services. Other suggestions included:

- Teachers and educators having access to professional development and support about trauma-informed practice.
- Easier access and wider eligibility to receive Additional Child Care Subsidy.
- Support to get children to education and care services such as transport services or fuel vouchers.

Respondent's insights about greater access to care reveal that interventions in this area of concern need to be tailored to the community, multi-faceted and collaborative.

**Financial  
support for  
vulnerable  
families to  
access  
education  
and care**

“

*“Further financial support – easier access to Additional Child Care Subsidy.”*

*“Improved access to Federal Government funding, the eligibility criteria for families experiencing vulnerability needs to be overhauled! If education and care is to support the long term outcomes for children and families, equitable access to these services is crucial. How does the cycle get broken if the same strategies are implemented generation after generation – with no change in outcomes? Access to ECEC must become a child's right, not only a Workforce Participation Strategy.”*

*“Easier access to fee support without having to disclose personal situations to multiple people in an effort to gain financial assistance – the process is complicated when the parent is not a permanent resident.”*

*“Easier access to Additional Child Care Subsidy .... (the difficulty is the) documentation required to apply especially where children remain in foster care, and they must be renewed.”*

*“A more streamlined access to Additional Child Care Subsidy payments. Centre's should be able to recognize this need and allocate some form of funding, even if it was just 6 weeks as previous.”*

”

Respondents also reflected on the impacts of the COVID-19 pandemic and provided insights from these experiences:

### **Insights reflecting on COVID-19 pandemic**

“We believe it was harder to maintain family connections and therefore were not as well informed of difficulties children and families were experiencing – there was too much trauma in too little time.”

*“For families who have experienced loss of work due to COVID-19, we have adopted the NSW fee-free preschool, and this has greatly supported these families in 2021.”*

Accessibility supports, including transportation and inclusion support, was also a critical issue raised by respondents:

### **Inclusion supports, transportation and access for all children**

“We want to see more accessible Inclusion Support for centres to use with vulnerable children, to help them during the year on a day to day basis. The current system is eroding the ability to employ an extra assistant as the criteria is becoming more and more stringent. Children who were previously funded (e.g. Global Development Delay) no longer fit the criteria, and as such in a small service they don't get the extra support they need.”

“During the free child care period offered in 2020, many of our vulnerable children were able to increase their hours – with some attending every day. This had a big impact on their wellbeing and learning outcomes. When free child care ended and parents once again reduced the hours we noticed those same children exhibiting more challenging behaviours and reduced overall wellbeing.”

*“Pick-up and drop-off from home to ensure attendance and assist in transport issues would be helpful. Subsidised attendance voucher (similar to Active Kids and Creative Kids vouchers) to attend a number of sessions.”*

Respondents also observed accessibility impacts for families with poor access to timely supports from community and disability services:

### **Disability and community supports**

“Geographically isolated families are under extreme stress and have little or no access to support services.”

*“(There is a) lack of local geographic support agencies. The local early intervention centre shut down with introduction of new NDIS scheme, leaving families with no regular support agency.”*

“NDIS and In Home Child Care should work together to support families' and children already accessing IHC. It should be able to be funded under the NDIS, to have the same worker continue to



support the children transitioning to special education or school systems. Currently, IHC workers are not able to do this.”

*“We need qualified and experienced specialist staff to support vulnerable families and children.”*

*“There should be less wait times to see Allied health professionals.”*

”

Respondents highlighted their need for professional learning and development and collaboration with support services:

“

**“We need more professional help from agencies and collaboration with services.”**

### **Professional learning opportunities**

*“Training of staff to assist with children mental health and behaviour issues”*

*“We need resources and funding to train staff to support children who have experienced domestic violence, and we need specific training to support and educate early childhood professionals to work with children with learning difficulties and disabilities or delays.”*

”

These issues were highlighted in 2017 and 2019 TICCS surveys, and they continue to be challenges for respondents. These results show that some children and families experiencing vulnerability and disadvantage are missing out on accessing quality education and care services. It is these children and families who benefit the most from accessing the services; a locally-tailored and child-centred approach to public policy would consider the short, medium and long term outcomes for the children participating in good quality early education and care.

## **Waiting lists**

### **Number of children on waiting lists**

**In 2021, over half (58%) of respondents had waiting lists. This is a decline from 67% in 2014, 70% in 2017 and 63% in 2019.**

Waiting lists rates were at their lowest point in the 2021 survey. At the time of the survey, it is plausible that the societal and economic impacts from COVID-19 may still have been affecting community demand for early education and care. Anecdotal reporting from some services indicated that during the height of the pandemic, very few families placed their names on waiting lists for the future. While families have started to go on waiting lists, some services report their waiting lists being much shorter than previous years, and families wanting fewer days of attendance, due to changed work arrangements such as ongoing work from home.



Over a third (36%) of children on waiting lists were under 2 years old, 23% were aged between 2 and 3, 36% were aged between 3 to 5 years and 4% were primary school age. It is interesting to note the increase in waiting lists are children aged 3 to 5 years from previous years. Some states and territories introduced free preschool during the height of the pandemic; anecdotal reporting indicates that many preschools experienced increased demand, with families opting to leave long day care centres where they were paying fees to attend free preschool.

Table 12. Proportion of children by age on waiting lists

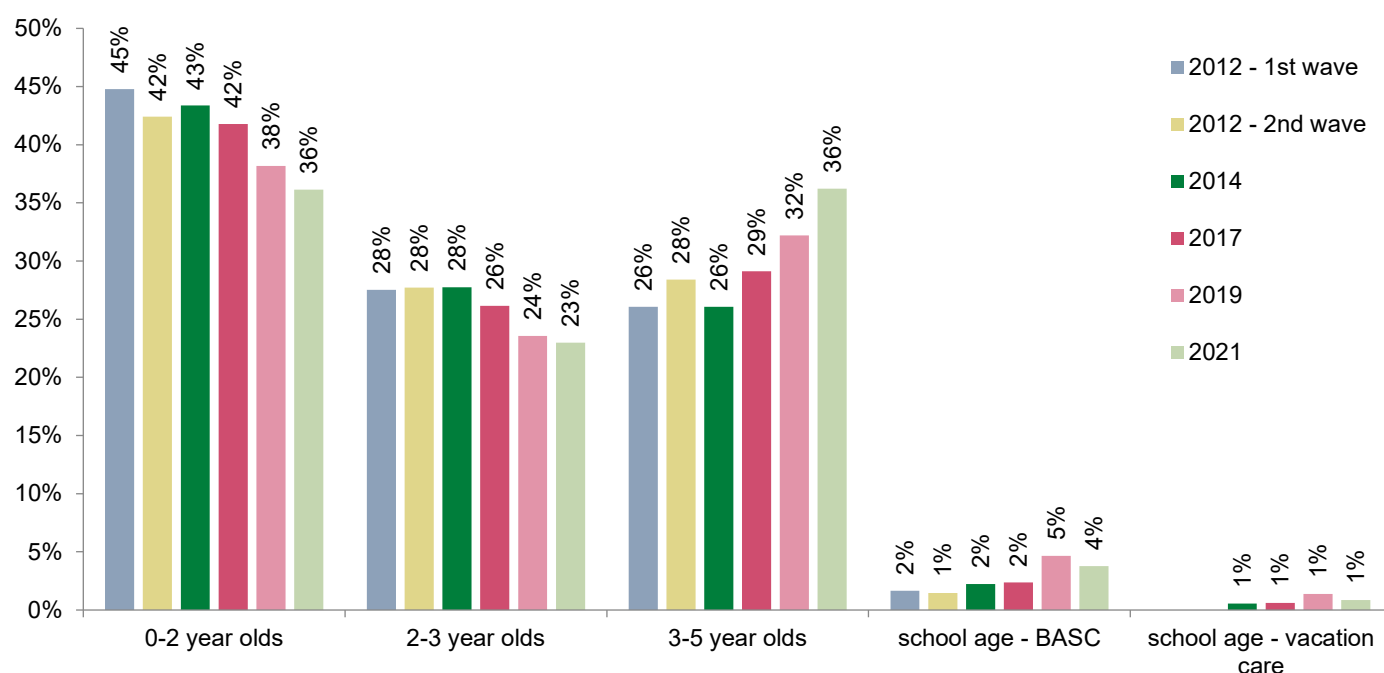
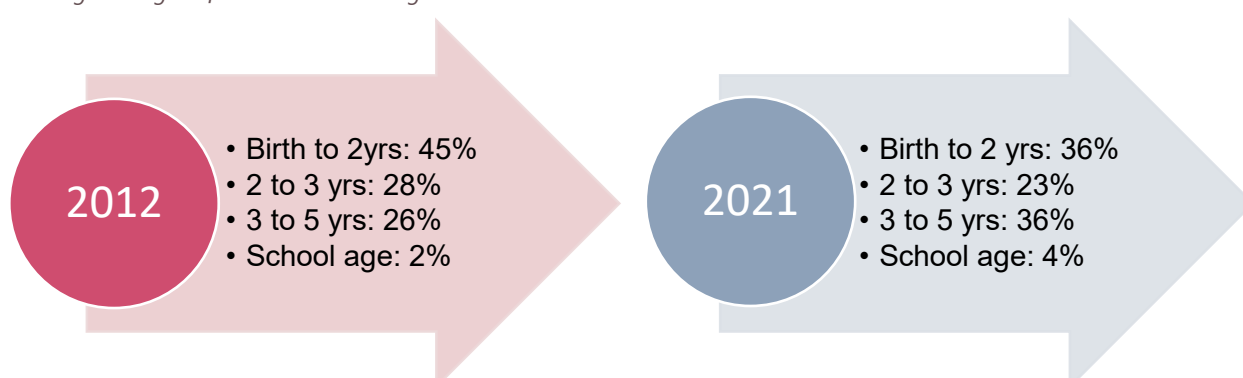


Table note:

2012 surveys did not separate school-aged children into before and/or after school care and vacation care

Over time, the proportion of babies and toddlers on waiting lists has declined while the proportion of preschool/kindergarten and school age children has increased.

Table 13. Changes in ages of children on waiting lists



These changes can be attributed to continued growth in the number of centre-based care services from 6,156 in June 2012, to 8,277 in May 2021<sup>10</sup>.

It is interesting to speculate why these age-related changes to waiting lists have occurred. Overall, the proportion of children using centre based care has increased from 27.5% in June 2012 to 36.3% in March 2019, declining to 30.4% in December 2020<sup>11</sup>. This decline in the period from March 2019 to December 2020 can be directly attributed to the impact of COVID-19 on child attendance at services.

The increase in waiting list demand for pre-schoolers may reflect state-based policies that are encouraging greater attendance of 3-year-olds, and universal access for 100% of children in the year before they go to school, along with enhanced affordability strategies in some states and territories.

More services reported having waiting lists in Major cities (61%), compared with Inner Regional (50%) or Outer Regional areas (49%).

## Length of time on waiting lists

Respondents' waiting times to access services for children aged from birth to less than two years has remained consistent at 6 to 12 months in 2019 and 2021; a significant improvement from the previous waves with families waiting one to two years for places. Wait times for children aged from 2 to less than three years has remained consistent across all survey waves at 6 to 12 months. Pre-schoolers waiting times were less than three months. Waiting times for before and after school care range from three to six months.

Table 14. Peak waiting times by age group, 2012 to 2021

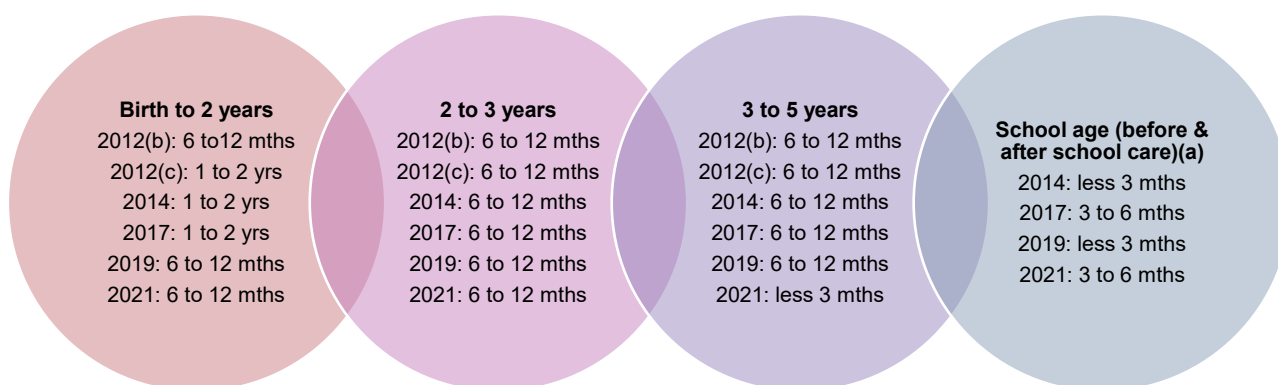


Table Notes:

Data for school aged children on waiting lists were not comparable for 2012 waves, as school aged care services were not collected separately in 2012. Data for Vacation care services are not shown here due to low numbers

Data are from 2012 wave 1

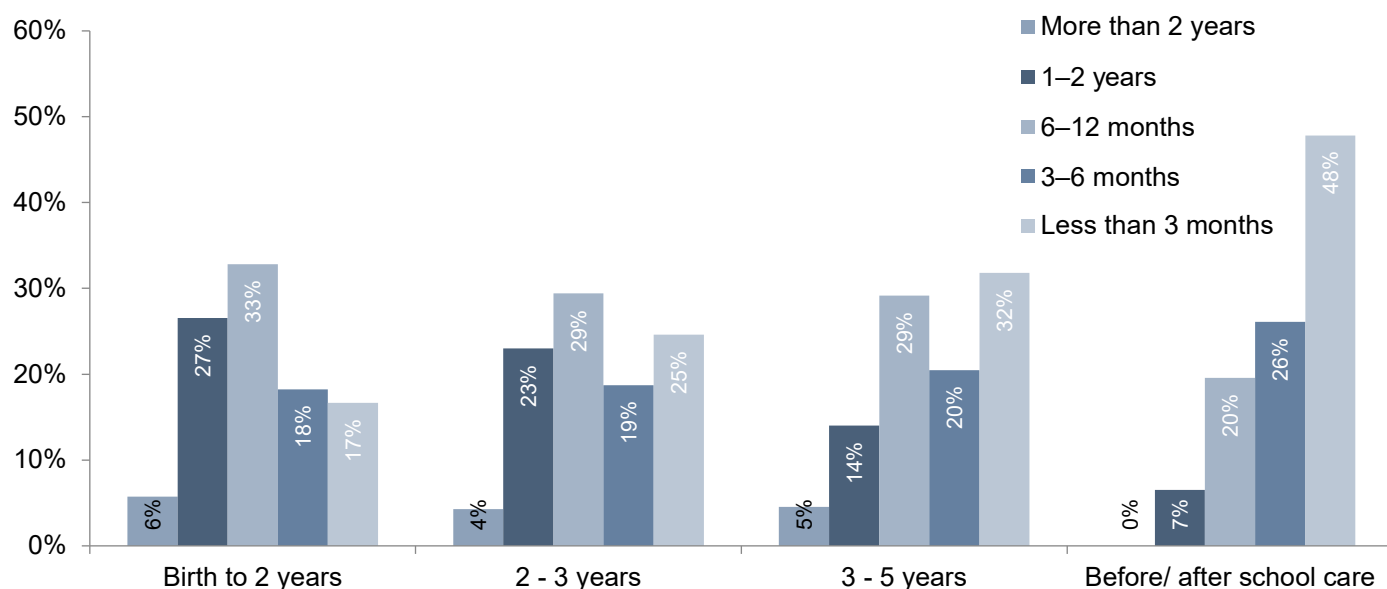
Data are from 2012 wave 2.

<sup>10</sup> Department of Education (2013), *Child Care & Early Learning in Summary*, December Quarter 2012, p.4. Australian Children's Education and Care Quality Authority (2021), NQF Snapshot Q1 2021, p. 7

<sup>11</sup> Department of Education (2013), *Child Care & Early Learning in Summary*, December Quarter 2012, p.3. Department of Education, Skills and Employment *Child Care Report* March quarter 2019 and December quarter 2020

Waiting times varied by age group with proportionally more children aged from birth to less than two years waiting longer to access services. It is not known how many of these children requiring places aged from birth to less than two years had not been born yet, as some families placed their children on waiting lists while they were still pregnant.

Table 15. Average time on waiting list, children from birth to school age, 2021



## Affordable education and care

TICCSS commenced at a time of significant change in the education and care sector. Examples of these changes are the introduction of Modern Awards, the NQF work towards improving pay and conditions for teachers and educators and ensuring quality outcomes for children through improved qualification requirements, better child: staff ratios, and mandated evidence-based curricula and quality frameworks.

Daily fees for families did increase more than Consumer Price Index (CPI) during the early implementation of the NQF in response to improved ratios and quality requirements. Most recent changes, such as the requirement to have a second early childhood teacher had minimal impact on daily fees – recent fee increases should be attributable to regular CPI and cost of operating expenses.

The Commonwealth Government provides the Child Care Subsidy to help make education and care services more affordable for families. Family eligibility for the Child Care Subsidy is based on family income and level of work activity. Families who do not meet the work activity test are eligible to receive only 24 hours of subsidised education and care per fortnight, many of these families may not be able to afford more days for the children at services.

A recent report published by The Parenthood shows that families in Australia spent proportionally more on education and care service fees at 16% of average family income,

compared with all OECD countries at 10% of average family income. This report also quotes Productivity Commission (Productivity Commission Report on Government Services 2020, Early Childhood Education and Care, 3.31 and Table 3A.39) data reporting that more than one quarter of people aged over 15 years, not in the labour force, were not in the labour force due to the cost of child care<sup>12</sup>.

## Fee increases

It is standard business practice for education and care services to increase their fees on an annual basis, to reflect increased operating costs that most often relate to wages and conditions, various insurances and accommodation costs. Many not-for-profit education and care services have modest fee increases in line with proportional increases to the cost of living. In February 2021, close to the time of the 2021 TICCSS survey, the national CPI increased by 1.1%<sup>13</sup>.

### *Did fees go up?*

Respondents were asked by what percent they had increased their fees over the past 12 months. In 2021, answers to this question were:

- Just over half (56%) had not increased their fees in the past 12 months, compared to 19% in 2019.
- Two in five respondents (39%) had increased fees by less than 5%, compared to 66% in 2019.
- Only 3% of respondents increased their fees by between 5% and 10%, compared to 11% in 2019.
- Only 1.5% of respondents increased fees by more than 10%, compared with 4% in 2019.

While there was a sharp drop in fee increases between 2019 and 2021, they were more likely in advantaged areas (SEIFA Quintile 1 and 2). However, most services only instigated modest increases of under 3%.

It is likely that the extended period of free childcare during 2020 impacted services' decisions on fees in the past 12 months.

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<sup>12</sup> The Parenthood (2021), Making Australia the best place in the world to be a parent, p. 22

<sup>13</sup> <https://www.abs.gov.au/statistics/economy/price-indexes-and-inflation/consumer-price-index-australia/mar-2021>, accessed 15 May 2021

Table 16. Fee increase over the last 12 months, by SEIFA quintiles 2021

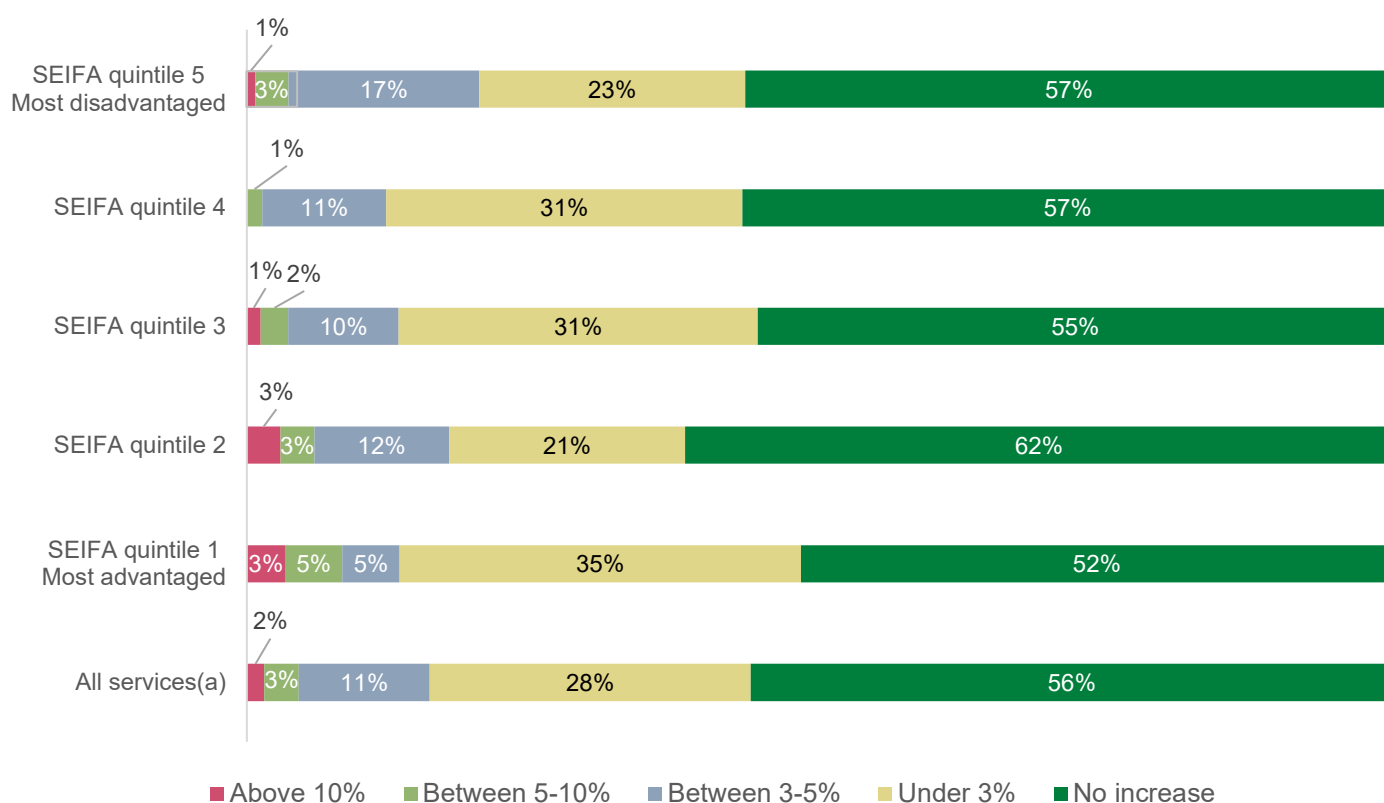


Table notes:

(a) The Socio-Economic Indexes for Areas (SEIFA) Index of Relative Socio-Economic Advantage and Disadvantage (IRSAD) is used by the Australian Bureau of Statistics (ABS) to classify services by the level of relative socio-economic advantage and disadvantage of their local area. SEIFA was used by ACECQA as a proxy measure to identify services that were more or less likely to educate and care for children from disadvantaged backgrounds.

### Why did fees go up?

The normal cost of living/CPI increase continues to be the main reason for fee increases, followed by increases in staff wages. The financial impact of significant regulatory changes to early and middle childhood services has slowed (as would be expected) with most of the changes occurring from 2012 to 2016. Less respondents (31%, 199) answered this question due to the sharp drop in fee increases.

Less than half (49%) of respondents to this question indicated their fees went up due to increase in staff wages. In part, this may be related to employing a second early childhood teacher for some respondents. There was also a 1.75% increase in children services wages effective from 1 July 2020.

2021 also saw the lowest rate across the six TICCSS waves of respondents reporting that fee increases were due to increases in staffing (12% compared with 33% in 2012).

Table 17. Main reason/s for fee increase, 2012 to 2021

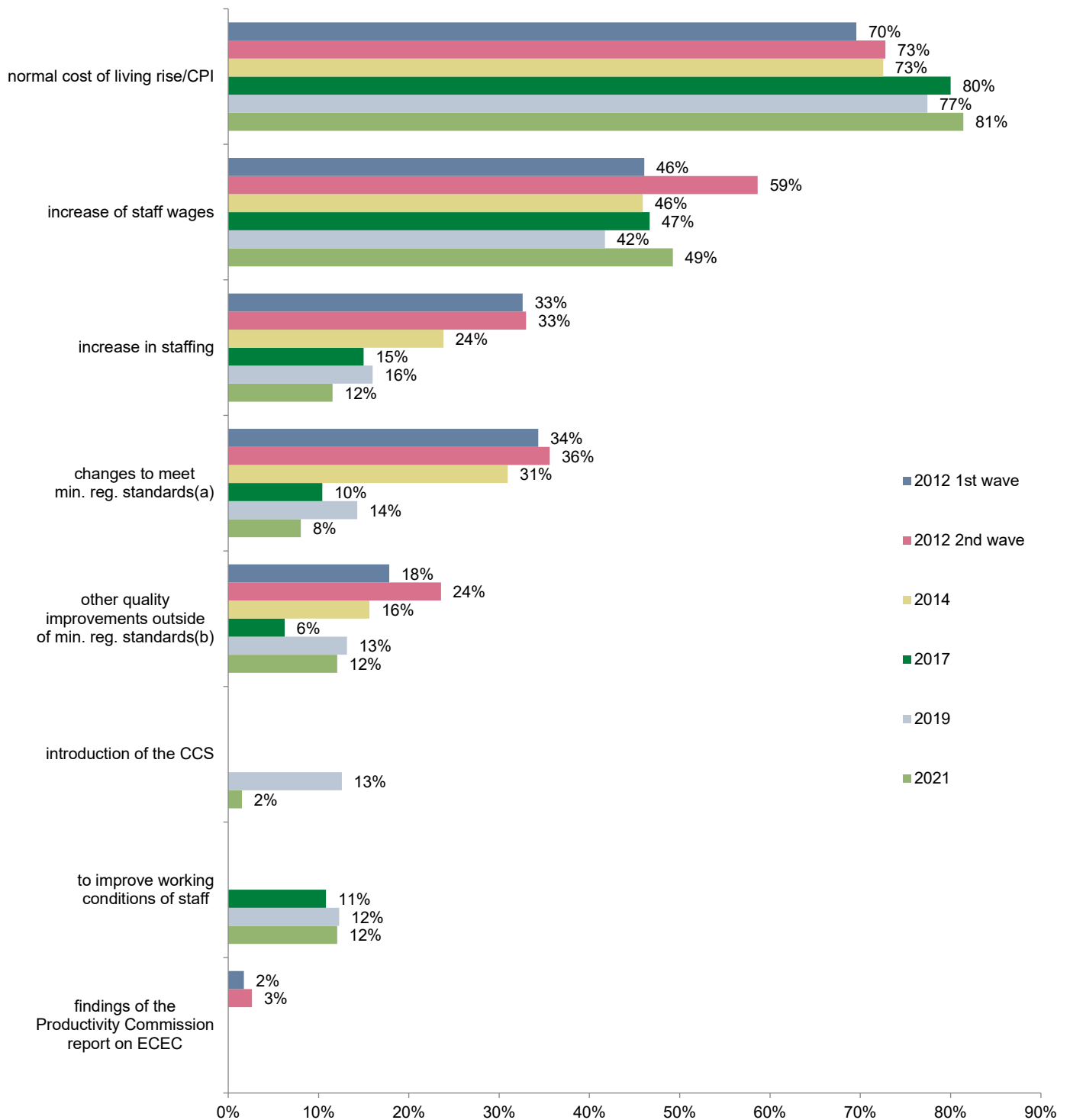


Table notes:

(a) "Changes to meet minimum regulatory standards."

(b) "Other quality improvements outside minimum regulatory standards."

## Impressions of the impacts of fee increases on families

Respondents were asked to consider how fee increases may have impacted the families using their services, including specific feedback from families reducing days or hours, or leaving the service altogether.

In 2021, two thirds (67%) of respondents to this question reported that no families had expressed frustration due to fee increases, and one third (35%) said that many families had expressed their understanding of the need for fee increases.

Only a very small proportion of services reported that some or many families left the service due to fee increases (1%), and only 5% of respondents to this question reported that some or many families reduced their days or hours due to fee increases.

Table 18. Impact of fee increases on families

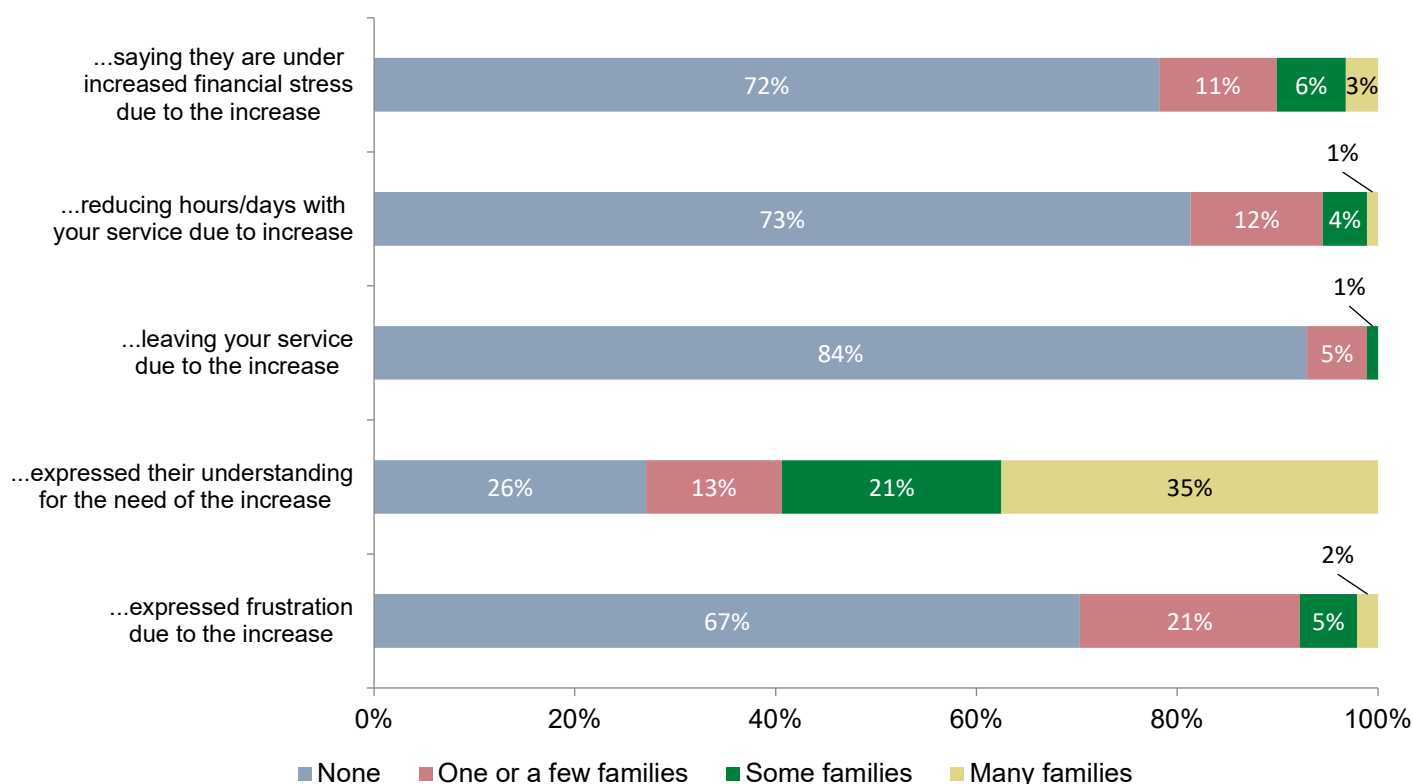


Table note:

Proportions are calculated from the number of respondents to this set of questions.

It is difficult to determine the impact of COVID-19 on respondents to this question, as most would have been able to provide fee-free education and care to families during the height of the pandemic.

## Summary of accessibility measures in TICCSS

### Accessibility across Australia and for vulnerable families

Not-for-profit services are accessible across all areas of socio-economic advantage and disadvantage, and areas of remoteness. High numbers of not-for-profit services support children and families in vulnerable circumstances. In 2021, 87% of services provided care for children in vulnerable circumstances – an increase since 2012 (81%). Respondents also reported that they believed the number of children and families experiencing vulnerability or disadvantage has increased over time from 2012 to 2021.

### The impact of waiting lists

In 2021, only half (51%) of respondents had waiting lists – a significant drop from 63% in 2019 and 70% in 2017. Demand for places for children aged from birth to less than two years remains, however in 2021 there is increased demand for places for children aged from 3 to 5 years, as well as demand for children aged from three to five years.

### Impact of fee increases

In 2021, 56% of respondents did not increase their fees compared to 19% in 2019, and those that did increase their fees (39%) increased their fees by less than 5%, compared to 66% in 2019. COVID-19 disrupted business as usual for children's services with the provision of fee-free education and care services during the height of the pandemic. It is likely that "free childcare" government policy affected services' decisions regarding fee changes.

The impact of fee increases on families appears to have lessened since 2014. Very few families were leaving services or reducing hours due to fee increases in more recent years.

Two thirds (67%) of respondents reported that no families had expressed frustration due to fee increases, and one third said that many families had expressed their understanding of the need for fee increases.





# Impacts of 2020

## Spotlight on the impact of the COVID-19 pandemic, fires, floods and drought

**In Australia in 2020, many communities experienced unprecedented disaster and disruption to their lives. Prior to the COVID-19 pandemic, communities were already experiencing impacts from droughts, extreme weather events, and unprecedented fires across the country.**

### Spotlight on the impact of COVID-19

TICCSS participants were asked about the impacts of changes and events in Australia in 2020. As well as the COVID-19 pandemic, services faced unprecedented fires, drought and floods.

The global pandemic has impacted all aspects of our life and work. Education and care services were viewed as essential services for frontline workers during the height of the pandemic. Different government policies that impacted education and care services include JobKeeper, the early removal of JobKeeper, free child care, and the removal of allowable absences.

The 2019 – 2020 fires burnt over 12.6 million hectares, destroyed 5,900 buildings including 2,800 homes<sup>14</sup>. A total of 33 people died<sup>15</sup>. Across the spring and summer, smoke and dust storms led to extreme levels of air pollution<sup>16</sup>. 11.3 million Australian adults, or 57% of the Australian adult population, were physically affected by smoke from the bushfires<sup>17</sup>. Services were required to keep children indoors and monitor children’s respiratory symptoms.

As essential support to the frontline workers, education and care services were expected to stay open during the COVID-19 pandemic. Many services experienced significantly decreased utilisation during the initial months of the pandemic, with utilisation increasing in some instances to higher levels than pre-the pandemic when free care was introduced.

Most participants (83%) responded to the question “As a result of changes and events in Australia in 2020, have you experienced these situations?” This indicates that a high level of services experienced impacts, although those that did not respond may also have had impacts that were not listed in the question.



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<sup>14</sup> UN Environment Programme (2020) Ten impacts of the Australian bushfires, <https://www.unep.org/news-and-stories/story/ten-impacts-australian-bushfires>

<sup>15</sup> Australian Parliament House (2020) 2019-2020 Australian bushfires – frequently asked questions: a quick guide, [https://www.aph.gov.au/About\\_Parliament/Parliamentary\\_Departments/Parliamentary\\_Library/pubs/rp/rp1920/Quick\\_Guides/AustralianBushfires](https://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/rp1920/Quick_Guides/AustralianBushfires)

<sup>16</sup> NSW Government (2020) Air quality special statement spring-summer 2019-2020, <https://www.environment.nsw.gov.au/topics/air/nsw-air-quality-statements/air-quality-special-statement-spring-summer-2019-20>

<sup>17</sup> Biddle, N., Edwards, B., Herz, D., Makkai, T. (2020) Exposure and the impact on attitudes of the 2019-20 Australian Bushfires, <https://csrcm.cass.anu.edu.au/research/publications/exposure-and-impact-attitudes-2019-20-australian-bushfires-0>

Table 19. Respondents experienced the following situations due to the changes and events in Australia in 2020

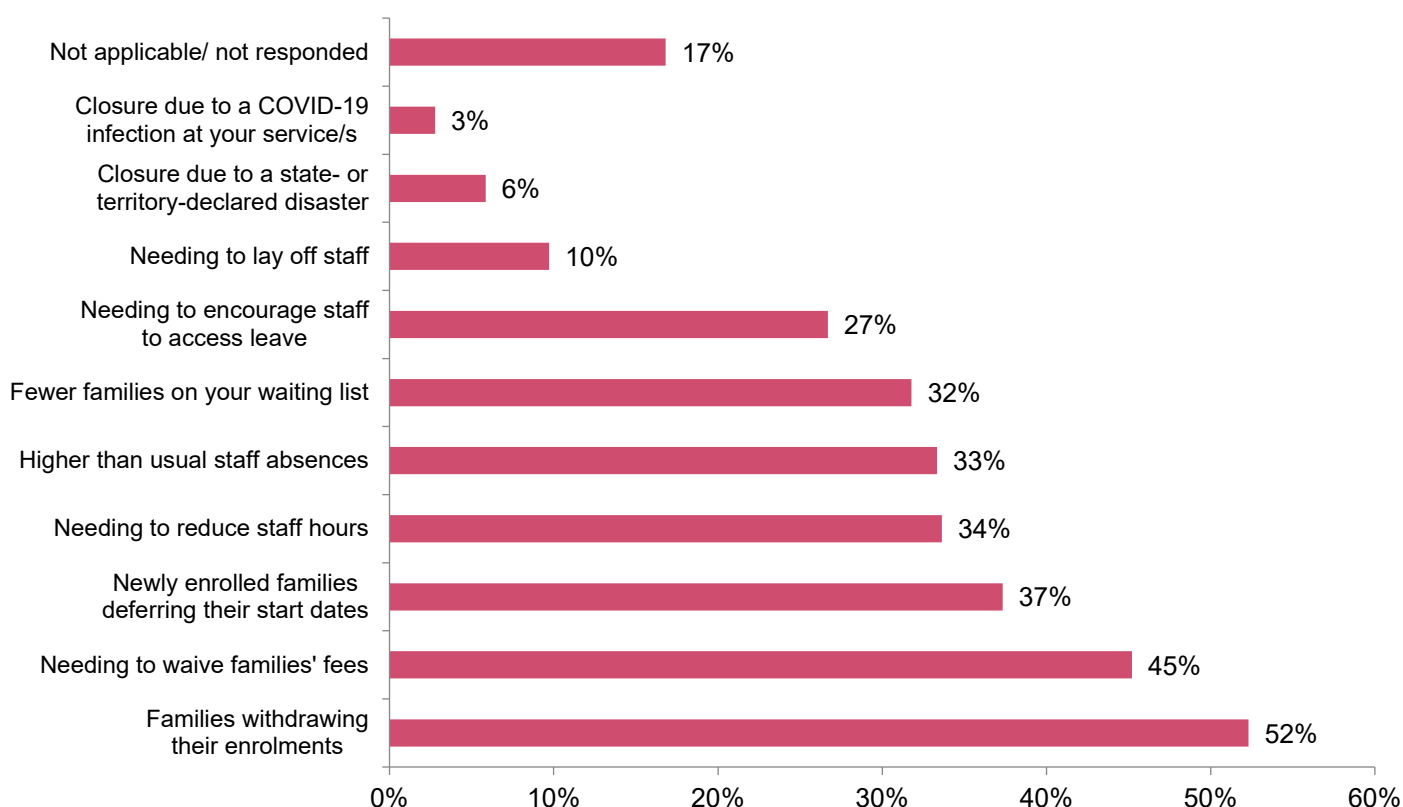


Table note:

Proportions are calculated from the total number of TICCSS participants.

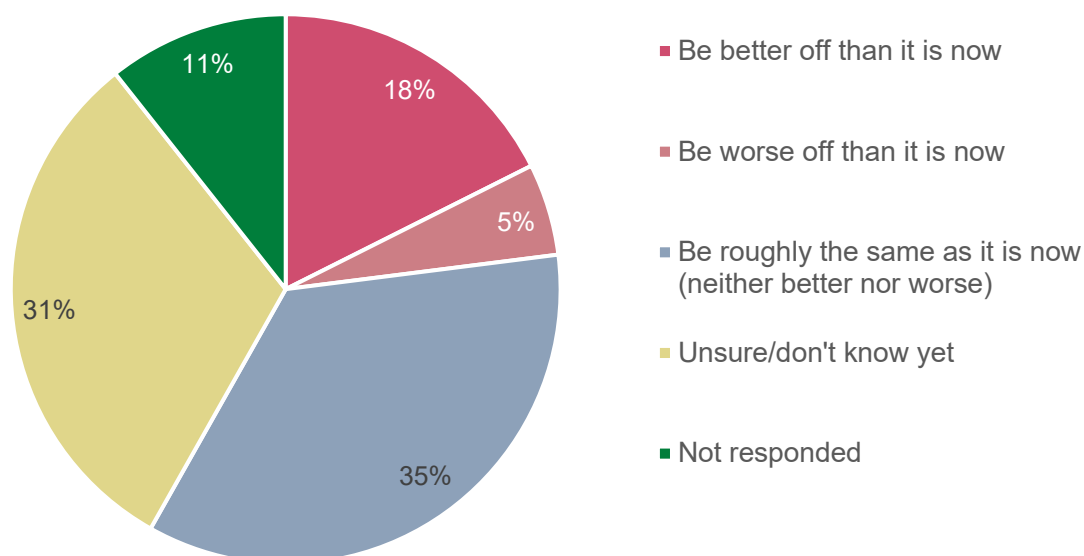
Enrolments were the most likely aspect of service functioning to be affected. Half of services experienced families withdrawing their enrolments (52%) which may explain why 45% of services chose to waive families' fees to mitigate this effect. Over a third (37%) of services experienced newly enrolled families deferring their starting dates, and a third (32%) experienced fewer families on their waiting list. This corroborates data reported earlier in this report that in 2021, only half (51%) of respondents had waiting lists – a significant drop from 63% in 2019 and 70% in 2017.

Impacts on staffing were also common, with a third of services (34%) having to reduce staff hours and a third (33%) reporting higher than usual staff absences. One in four services needed to encourage staff to access leave (27%), and one in ten needed to lay off staff.

Respondents commented on families opting to self-isolate or work from home and reducing attendance, this has resulted in some services having many more part time places. A few services particularly noted challenges in retaining and recruiting teachers and educators, which impacted on their ability to operate their usual hours at some periods.

One third of respondents (35%) believe that their services would be roughly the same in 12 months, almost one third (31%) were unsure, and only 18% thought they would be better off. Sadly 5% believed they would be worse off in 12 months then they are now.

Table 20. How services will be in 12 months?



COVID-19 has created significant unrest and uncertainty particularly to children's services with rapidly changing government policies, mixed messages about being an essential service (however the first to have JobKeeper removed), the uncertainty about the future of work, and how parents may access education and care services into the future.

## Utilisation

Respondents were asked about their average weekly utilisation before the 2020 pandemic, during August 2020 (at the height of the pandemic in Australia), and their current utilisation. Prior to the pandemic, half (47%) of respondents to this question had high utilisation, from 91% to 100% – during the pandemic, only 19% of respondents had this level of utilisation. At the time of the survey this increased to 43%.

Utilisation of less than 60% means that services are at high risk of being financially unviable. Government supports during this period meant that this risk was alleviated. During the pandemic, 28% of respondents experienced utilisation of less than 60%. Before the pandemic, 9% of services had less than 60% utilisation. At the time of the survey, one in eight services (13%) had less than 60% utilisation. Respondents' services are still operating at less than full capacity.

Table 21. Service utilisation before and during the pandemic, and current

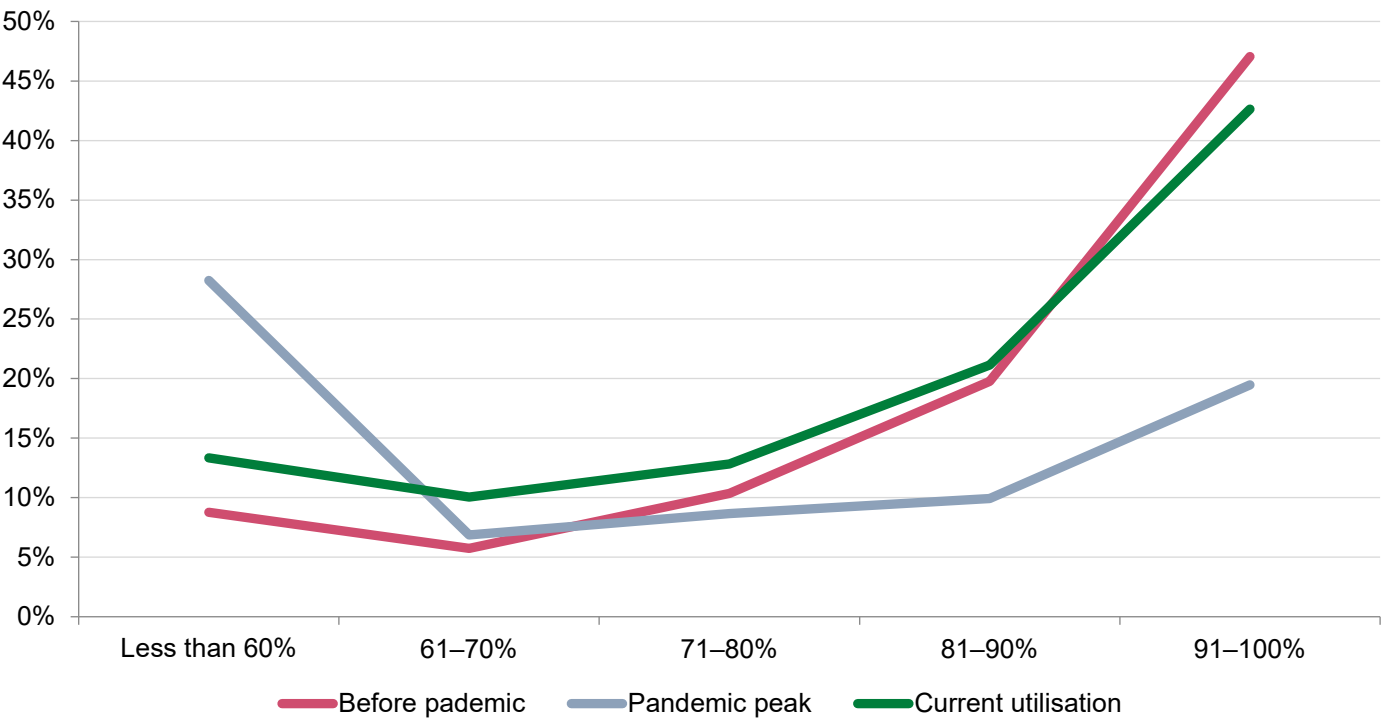


Table note:

Proportions are calculated from the number of respondents to this set of questions.

When looking at respondents’ experiences during the peak of the pandemic in Australia, services with under 60% were more likely to have less than 25% utilisation.

Table 22, Services with less than 60% utilisation, August 2020

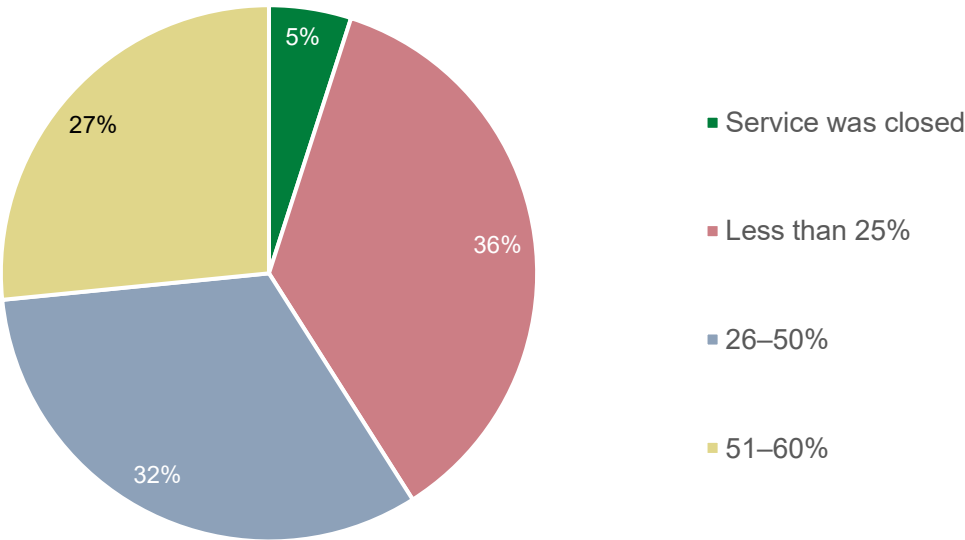


Table note:

Data for this graph is from the 222 services that experienced less than 60% utilisation during the pandemic.

## Impact on casual educators

Leading up to and during the lockdown in 2020, many employers across Australia were unable to provide casual employees with their regular hours. This was also the case for early and middle years' education and care services. However, when JobKeeper and the government supports through Free Kinder were implemented, many impacted services were able to secure business supports to retain workers who had been in their employment since March 21, 2019. The casual workforce of the sector provides services with flexible back-fill when staff are unexpectedly unable to work and can provide a gap-fill when vacancies take time to fill. This enables services to maintain ratio requirements. It is also beneficial to employees as usually, they attract a 20 – 24% loading, in lieu of leave entitlements and flexibility with their hours. Casual workers represent a sizeable cohort amongst early and middle education and care employees. In the first quarter of 2021, within the Health Care and Social Assistance industry ANZSIC category, which child care is a part of, 24% of employees are casually employed without paid leave entitlements<sup>18</sup>.

Just under two thirds of participants (57%) reported that they had casual workers in their employment, amounting to 1,741 casual educators across the 12 months prior. TICCSS participants were asked about the days and hours they offered casual educators. At the time of the survey, a higher proportion of services indicated having more causally employed educators than before the pandemic (54%). However, services were more likely to offer educators fewer hours than prior to the pandemic (55%). This data indicates a strong demand for casual educators for back-fill or gap-fill, however, there may be factors that are inhibiting services from allocating pre-COVID levels of hours. It may also indicate that there are more casual educators sharing fewer hours, and this is worrying in terms of supporting these educators' wellbeing and sustainability.

## Supporting children at risk of vulnerability

Early education and care services are well-positioned to foresee circumstances where children may be at risk of experiencing vulnerability. As mandated reporters, they can provide protective functions, but they can also support families by connecting them with community supports. During the COVID-19 pandemic, utilisation was affected and has not yet returned to pre-COVID levels, therefore it is reasonable to hypothesise that there have been fewer opportunities to detect risk factors leading to vulnerability. Therefore, researchers were anticipating a decreased level of reporting of child and family vulnerability, and an increase once daily life returns to normal. This is based on previous research findings which indicate that children are at increased risk of violence and neglect and that families experience heightened unemployment, socioeconomic disadvantage, housing stress and mental health problems during emergencies and natural disasters<sup>19</sup>. AIHW, reporting on child protection rates, found that notifications dropped during COVID-19 shutdowns and increased once restrictions eased.

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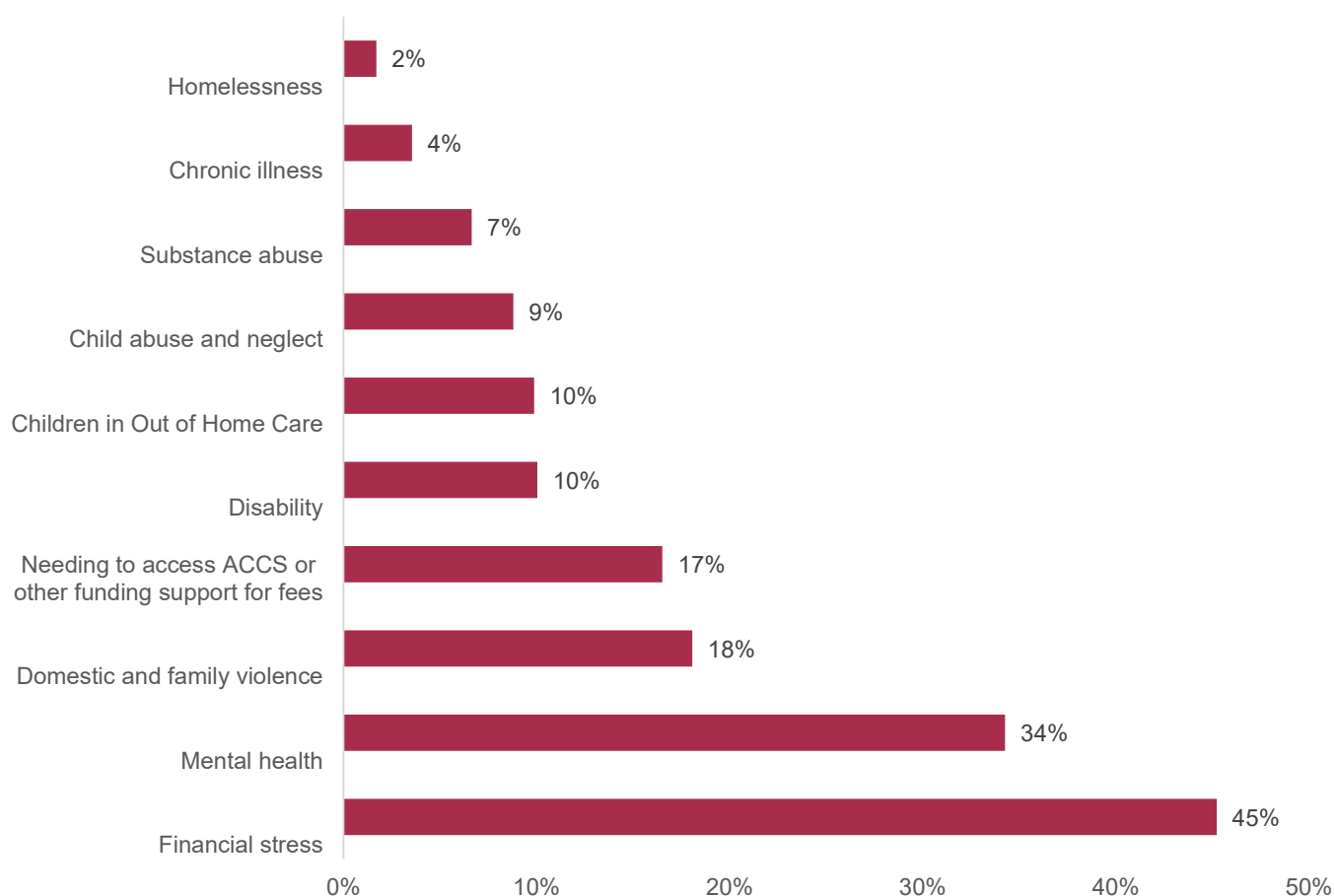
<sup>18</sup> Data are calculated using ABS 6291.0.55.001 EQ05 – Employed persons by Industry division (ANZSIC) and status in employment of main job, February 1991 onwards; Table 1.

<sup>19</sup> Australian Institute of Health and Welfare (AIHW) (2021) Child protection in the time of COVID-19, <https://www.aihw.gov.au/getmedia/b6dad47-7f22-4a1e-863c-ba7649204e00/aihw-cws-76.pdf.aspx?inline=true>

Participants were asked if, over the past 12 months, they noticed an increase in specific issues being experienced by children and families. Most frequently, services reported that there was an increase in financial stress (45%) and mental health challenges (34%). 17% of services reported an increase in the numbers of families who needed to access ACCS or other funding support for fees.

Sadly, one in five services reported that they had seen an increase in domestic and family violence (18%), and one in ten reported observing an increase in out-of-home-care (10%) and child abuse and neglect (9%).

Table 23. Increases in issues that children and families are facing, 2021





# Workforce

## Not-for-profit services support their education and care workforce.

**Not-for-profit services have a strong focus on supporting the education and care workforce. This leads to higher quality education and care, and happier teachers and educators.**

### What we know:

- Children form strong attachments to their teachers and educators and these relationships are vital for children to learn.
- Low wages in early education and care contribute to regular staff turnover – only a third of all educators have worked in their service for 3 years.
- We have a severe shortage of early childhood teachers – and this will worsen, as the number of students studying early childhood education is dramatically fewer than the numbers that Regulations will require services to engage.
- The two factors that impact most on service quality are the number of teachers and educators, and their qualifications. Higher qualified staff and more staff in a service mean higher quality education and care for children.

### What we found:

- Not-for-profit services participating in the TICCSS survey spend a very high proportion (almost 80%) of their income on staff.
- Not-for-profit services pay higher wages and conditions:
  - Two-thirds pay above award wages.
  - Most give more planning time than required under the award.
  - Most pay for professional development and provide it during normal working hours.

- Not-for-profit services participating in TICCSS that provide more planning time, have more stable workforces.
- Not-for-profit services have more staff who stay longer in the job. Two-thirds of TICCSS services had very high tenure – most of their staff had been with them for over 3 years.



# Resilient and equipped workforce

The quality of Australia's education and care services is underpinned by teachers and educators having the skills they need to develop and deliver high quality educational programs. One of the key outcomes of the introduction of the National Quality Framework was to improve educational outcomes for children through enhancing teacher and educator qualifications, with commensurate flow on to pay and conditions, tenure, professional development and well-being.

## Tenure

**Two thirds (66%) of teachers and educators in respondents' services have been in their service for over 3 years. This is a stark comparison to national averages, where only one-third of staff had been with their service for over 3 years.**

Retention of educators is a vital component of the provision of continuity of care for young children.

The turnover rate in the education and care sector has been reported to be as high as 30%, with educators staying with any one service for three and a half years on average<sup>20</sup>. TICCSS data, however, shows strong stability in the staffing of not-for-profit education and care.

The comparison between the *2016 National Early Childhood Education and Care Workforce Census* and the *2021 TICCSS* demonstrate the stark differences between the profiles of tenure stability in TICCSS respondents' not-for-profit services, compared with the overall sector.

Table 24. Comparison between tenure of contact staff, National ECEC Workforce Census, 2016 compared with TICCSS, 2021

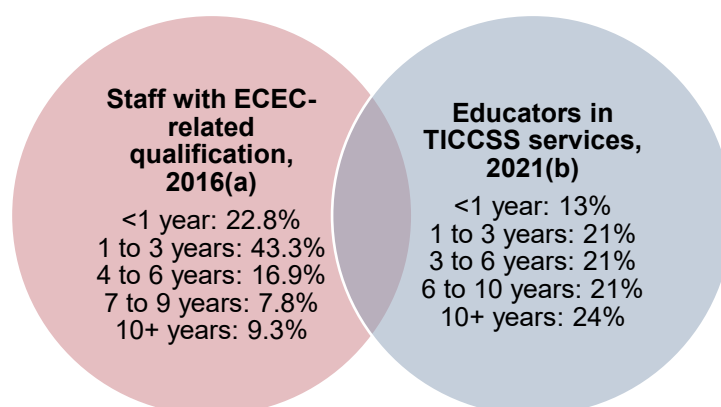


Table notes:

(a) Data is from National ECEC Workforce Census, 2016<sup>21</sup>.

(b) Data is from TICCSS, 2021.

<sup>20</sup> McDonald, Thorpe and Irvine (2018), Low pay but still we stay: retention in early childhood education and care

<sup>21</sup> ANU Social Research Centre, Australian DET (2017) 2016 Early Childhood Education and Care National Workforce Census, [https://docs.education.gov.au/system/files/doc/other/2016\\_ecec\\_nwc\\_national\\_report\\_sep\\_2017\\_0.pdf](https://docs.education.gov.au/system/files/doc/other/2016_ecec_nwc_national_report_sep_2017_0.pdf)

The proportion of teachers and educators who have worked six or more years in the service has increased slightly over the past three survey waves, while the proportion of respondents' teachers and educators who have worked from one to three years in the service has decreased over the same period.

Table 25. Educator length of tenure, 2014, 2017 and 2019

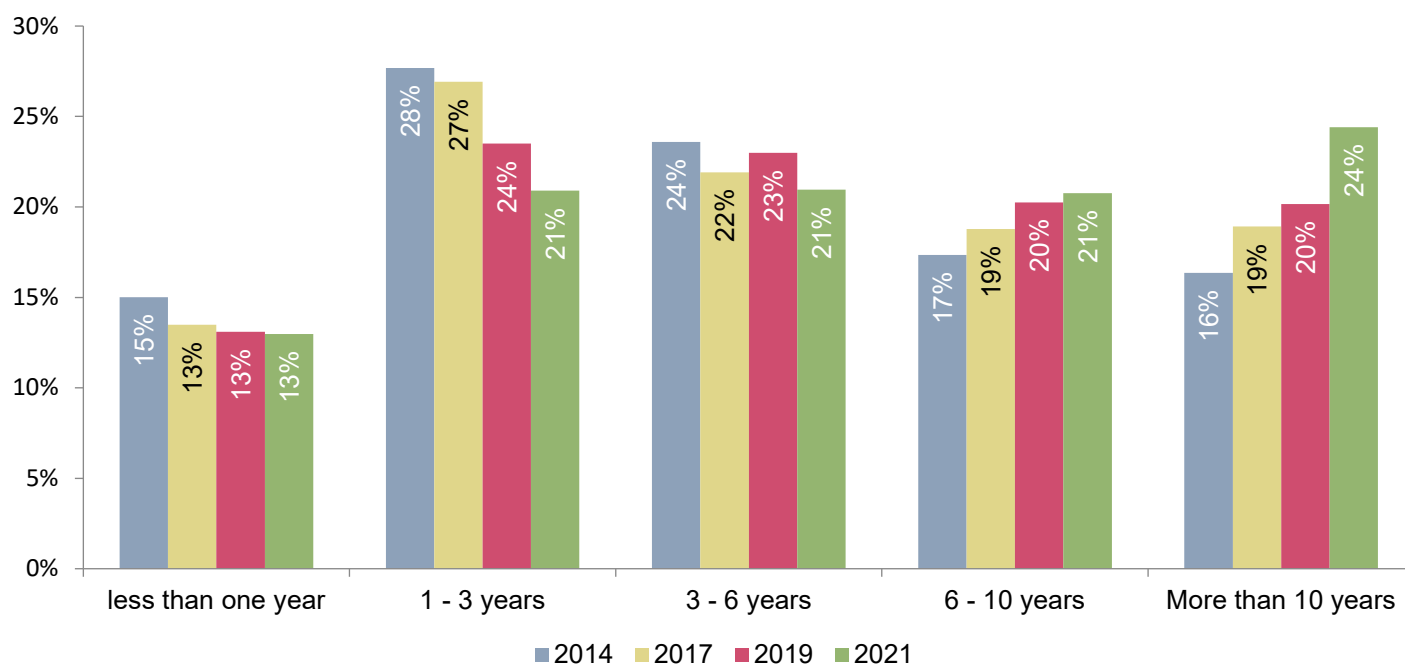


Table note:

In 2012, TICCSS did not include questions about length of tenure.

Tenure is also explored in the section on *Pay and conditions* and *qualification of educational leaders* later in this chapter.

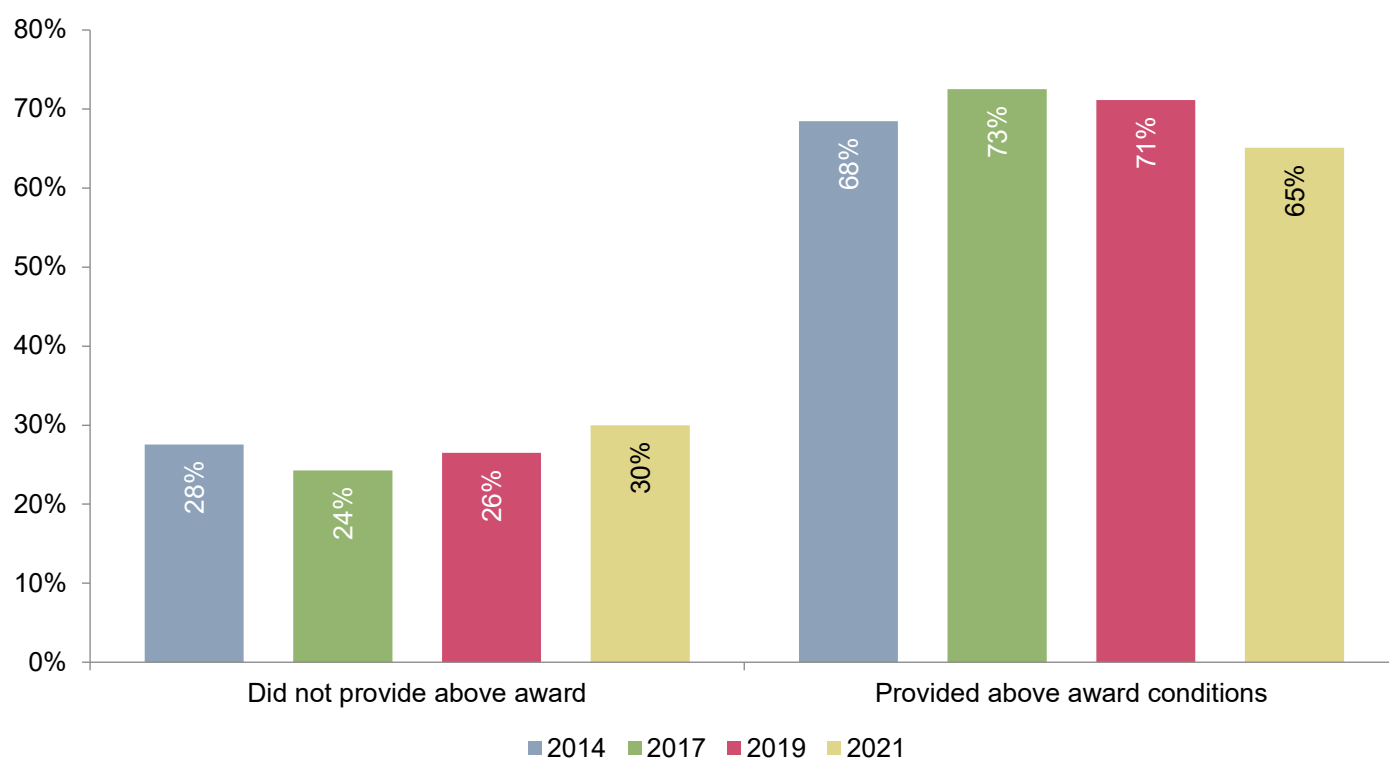
Significantly, services with *Very high* tenure stability were:

- More likely to be providing above awards and conditions and more likely to be providing a higher number of awards and conditions.
- More likely to have educational leaders who had higher qualifications such as a bachelor or postgraduate degrees.

## Pay and conditions

In 2021, 65% of respondents provided conditions and pay above the relevant award. This is lower than previous surveys.

Table 26. Pay conditions above award, 2014, 2017, 2019 and 2021



In 2021, respondents to this question provided:

- Above award wages – 93%
- Above award programming time – 62%
- Above award leave entitlements – 47%
- Study leave days – 29%

Some respondents also provided the following above award conditions:

- Higher superannuation rate (13%, 17%)
- Bonuses mid-and end-of-year.
- Discounted childcare.
- Employee Access Programs (EAP).
- Ensuring better ratios.

- Fortnightly rostered days off.
- Wellbeing or wellness programs.

One respondent reported that they ensure:

“Higher child to staff ratios, fortnightly RDOs, program planning, project time, training, well-resourced rooms and staff resources, staff paid under PCS which is 4% above modern award, and staff were paid a wellbeing allowance during the height of the pandemic in 2020 (i.e. \$50 extra per day x 5 months).”

Above award pay and conditions were associated with longevity of tenure. To investigate the associations between tenure and conditions, services were categorised by the proportion of their staff who had been with their services for 3 years or more. Services were categorised as “Very High” if 75 – 100% of their staff had been with them for more than 3 years; “High” tenure if that was true for 50 – 74% of their staff, “Low” if that was true for 25 – 49% of their staff; and “Very Low” if that was true for 0 – 24% of their staff.

Table 27. Tenure stability of staff, by pay and conditions, 2021

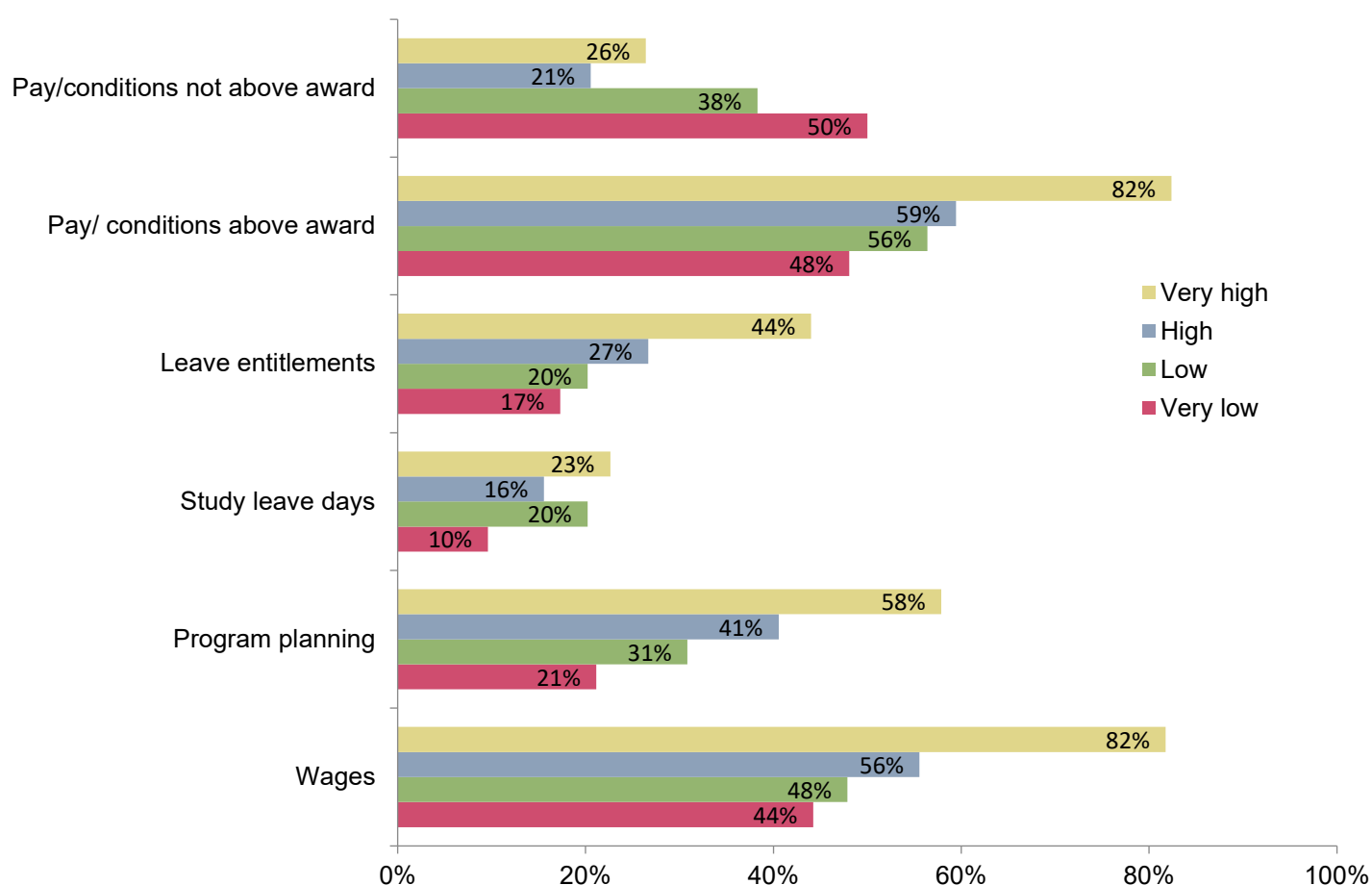


Table note:

Tenure stability is calculated by the proportion of staff who have been with the service for 3 years or more. Very Low refers to less than 25% of staff having been with the service for 3 years or more, Low refers to 25 – 49%, High refers to 50 – 74% and Very High refers to over 75%.



Pay and conditions were strongly linked with tenure stability. For instance, 82% of services that had Very High tenure stability paid staff and provided conditions that were above the award, whereas this dropped to 50% of services with Very Low tenure stability.

The largest correlation was between services with Very High tenure stability where more than half (58%) provided additional program planning entitlements. This contrasts with services with Very Low tenure stability where less than one quarter (21%) provided additional program planning.

## Professional development

### **The majority of not-for-profit services (74%) provide educators with access to professional development.**

Respondents were asked about different professional development options they may provide for their teachers and educators.

In 2021, attendance at professional development during work hours (82%) and paying fees for professional development (85%) ranked as the top two options for respondents to this question.



Table 28. Professional development options provided, 2017, 2019 and 2021

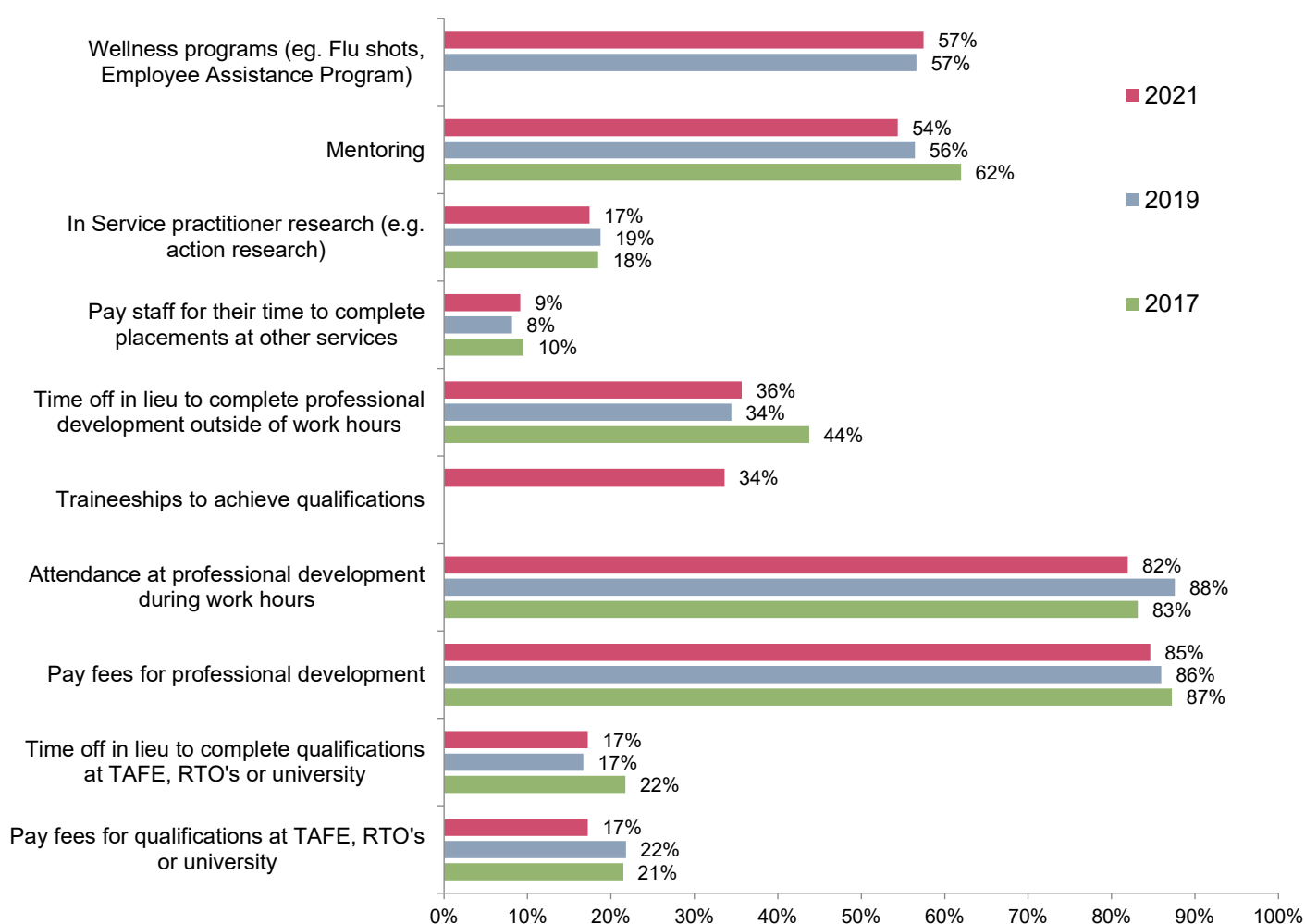


Table note:

Wellness was a new category in the 2019 survey. Different professional development questions were asked in both 2012 waves and are not compatible with the current waves. This question was not asked at all in 2014.

In 2021, respondents noted other professional development provisions, including:

- Provision of individual technology
- Paid study leave for post-graduate qualifications (1 full day study leave per week, per person)
- Free diploma and Certificate III training through company's training organisation
- Robust inductions
- Replacement staff employed so educators can fulfil online training at work

## Expenditure on professional development

Respondents were asked to calculate professional development expenditure as a proportion of total annual revenue. The most frequent allocation of professional development was 2% – 5% of annual revenue (38%).

Table 29. Expenditure spent on professional development, 2021

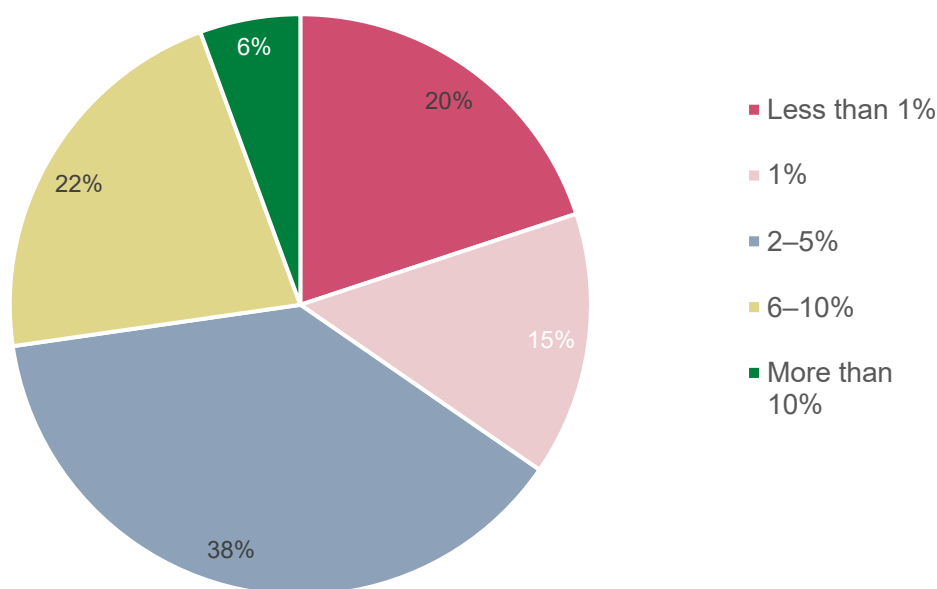


Table note:

Data for this table are calculated from the total number of TICCSS respondents who participated in this question.

## Annual expenditure on staff

The proportion of annual revenue related to staffing expenditure is a broad-brush indicator of quality – in general, the larger proportional spending indicates better qualified and greater numbers of staff employed at a service. Anecdotal evidence suggests that staffing costs in not-for-profit education and care services range from 75% of total revenue upwards; small private operators that may own one or a few services would generally be in the range of 70% to 85%, and large for-profit providers range from 55% to 65%. These lines can become blurred as more and more not-for-profit providers are being charged market rents which can dramatically increase fixed operating costs, and decrease the ratio of staffing expenditure to annual revenue.

More than three quarters (81%) of respondents reported spending over 70% of their revenue on staffing costs, with the largest proportion 43% spending 80% to 89% of annual revenue on staffing costs.

Table 30. Annual expenditure on staff, proportion of revenue, 2021

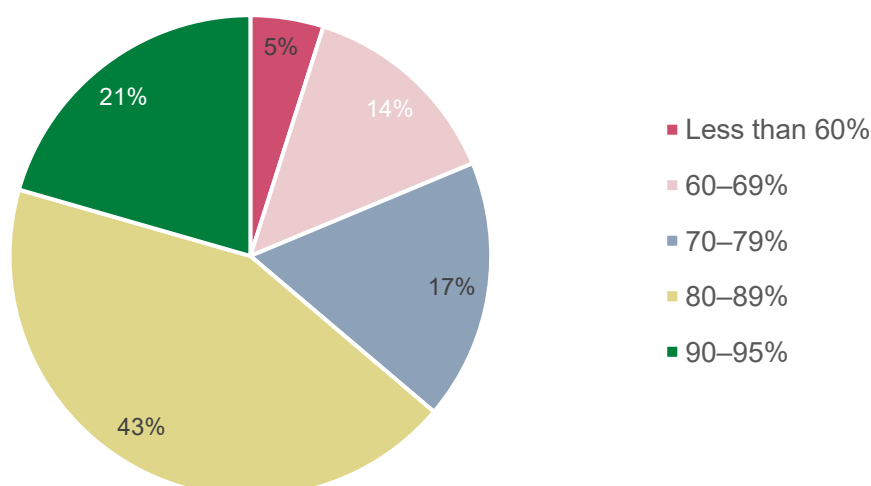


Table note:

Data for this table are calculated from the total number of TICCSS respondents who participated in this question.

Analysis of TICCSS data, using the rates of revenue spent on annual staff expenditure and tenure-stability measures, support previous research findings which suggest that expenditure on staff is linked with better pay and conditions outcomes for educators. Greater stability of staff will, in turn, lead to better care and development of children.

In 2021, generally the higher proportion of revenue spent on staffing, the longer the tenure. Three quarters of respondents (76%) that spent 80% to 89% of their revenue on staffing had either high or very high tenure, compared with 42% of respondents that spent less than 60% of their revenue on staffing.

Table 31. Proportion of revenue on staff expenditure, by tenure-stability, 2021

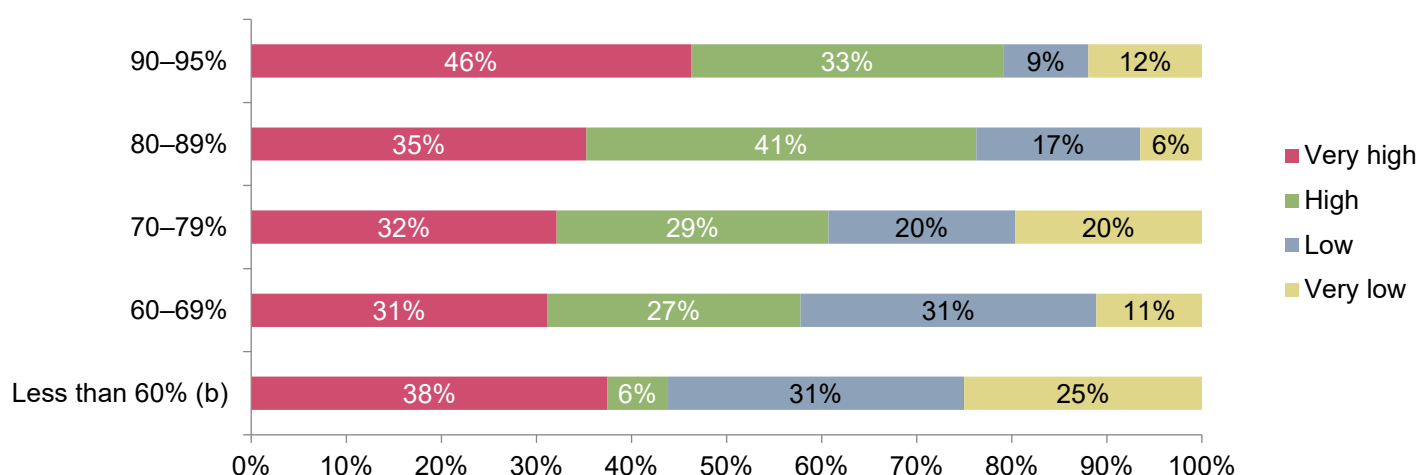


Table notes:

(a) Tenure stability ratings are calculated using responses for years' staff have been employed by the service for 3 or more years. Very low refers to services with less than 25% of staff having been with the service for 3 or more years; Low refers to 26 – 50%, High refers to those with 50 – 74%; and Very high refers to those with 75 – 100%.

(b) The total number of services that spent less than 60% of revenue on staffing was low (16) and therefore unreliable.

## Summary of stability, remuneration and budget allocation to supporting a resilient and equipped workforce

**Staff turnover rates and tenure give us an indication of teacher and educator satisfaction with their professional recognition, their place of employment and the match of pay and conditions to the needs in their life. Two-thirds of teachers and educators in not-for-profit services have been in their service for over 3 years. This compares starkly with the national averages, where only a third of staff in all Australian services had been with their service for over 3 years.**

Not-for-profit services are providing a high quality setting to support teachers and educators welfare and wellbeing. Working conditions can alleviate or exacerbate burnout. For instance, having limited time allocated for planning and programming, or to collaborate with colleagues, was one factor that was raised by Jessie Javonovic<sup>22</sup> (2013) as an impediment to wellbeing. This appears to be an area where services can do more, as less than half (32%) of services who completed TICCSS reported that they provided above award level programming time for educators. Our analysis supports the link between providing more planning time and tenure stability. Services with High and Very High tenure stability (29%, and 28% respectively) were more likely than those with Very Low or Low tenure stability to provide above award planning time (23%, and 26% respectively).

Providing a good wage for teachers and educators supports their costs of living and their ability to stay in their chosen field. With other low-skilled work providing wages that are comparative or higher, supporting teachers and educators with good pay will help them stay.

In 2021, over half of services (65%) provided wages that were higher than the award rate. Further, including the provision of other entitlements, the majority of not-for-profit services have consistently provided pay and entitlements for educators above their relevant industry award (71% 2014; 75% 2017; 73% 2019; and 68% in 2021).

Another factor contributing to teachers and educators wellbeing is the amount of support they have to engage in professional development<sup>23</sup> which helps to build capacity for critical reflection and professional growth. The majority of not-for-profit services provide access to professional development, with 82% supporting educators to attend professional development during work hours and 85% paying for their professional development costs.

Positive organisational cultures support teachers and educators to feel valued and appreciated. One measure of this is the proportion of services' budget that is allocated to staff costs. Generally, the larger the proportion of annual revenue is spent on staffing costs, the better qualified and greater number of staff employed at the service. This in turn leads to

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<sup>22</sup> Jovanovic, J. (2013). Retaining Early Childcare Educators. *Gender, Work & Organization*, 20(5), 528–544.  
<https://doi.org/10.1111/j.1468-0432.2012.00602.x>

<sup>23</sup> Cumming, Tamara. 2015. Early childhood educators' experiences in their work environments: Shaping (im)possible ways of being an educator? *Complicity* 12, (1): 52-66.



higher quality care. 81% of not-for-profit services reported spending over 70% of their revenue on staffing costs. The most frequent range of staff expenditure was between 80 – 89%, which is comparatively more than the average for large for-profit providers which range from 55 – 65%.





# Educational Leaders

## Spotlight on educational leaders

**Educational leaders in not-for-profit services are more supported – they are highly qualified (over half have a degree), highly experienced (almost three quarters have been in education and care over 9 years), get time to do their role (almost 60% get over 3 hours a week and 33% get over 8 hours). 60% of the educational leaders in not-for-profit services actually get to take this time! (Not surprisingly, taking this time is associated with high ratings).**

Under the National Regulations, education and care service are required to have a suitably qualified and experienced educator, co-ordinator or another individual as educational leader. Their role is to lead the development and implementation of educational programs in the service (Regulation 118). Educational leaders support staff in services to aspire to high quality care and pedagogy. Manjula Waniganayake, Sandra Cheeseman and Marianne Fenech define **intentional leaders** as “*educators who demonstrate courage in implementing leadership responsibilities in ethical ways. They act purposefully, learning and finding ways to collaborate with other to achieve collective goals*”. The intentional educational leader may be what was initially envisioned in the National Quality Framework. There is an increasingly diverse array of international research that supports the view that effective leaders in education and care settings are associated with higher quality centre practice, positive impacts on the quality of the centre as a workplace, and can support long term achievements in children’s development<sup>24</sup>.

In 2019, respondents were asked about their educational leaders for the first time – their qualifications, years of experience, and the time allocated weekly to fulfil this responsibility, and these questions continued in 2021.

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<sup>24</sup> Waniganayake, M, Cheeseman, S, & Fenech, M 2017, *Leadership: Contexts and Complexities in Early Childhood Education*, Oxford University Press, Melbourne.

**In 2021, the majority of educational leaders in respondent services had a Bachelor Degree in Early Childhood (57%), or a Diploma in Education and Care (33%). Three quarters (74%) had over 9 years' experience.**

Only a small proportion of educational leaders held a Certificate III in Education and Care (1%) or a Certificate IV in OSHC (2%). 7% had a Master of Educational Leadership/Early Childhood. Rates of qualifications have held steady since 2019, with a small increase in the proportion who held Bachelor or higher.

In 2021, TICCSS also asked respondents about other qualifications Educational Leaders held:

- 6 were working towards a Bachelor of Education in Early Childhood.
- 9 held other Bachelor level qualifications including Primary Teaching or Social Studies.
- 4 held other not specified qualifications.

Table 32. Qualification of educational leader, 2019, 2021

	2019		2021	
	Count	Per cent	Count	Per cent
Certificate III in Children's Services	4	1%	6	1%
Certificate IV in OSHC	4	1%	7	2%
Diploma in Children's Services/ OSHC	156	38%	134	33%
Bachelor/ Degree in Early Childhood	223	54%	230	57%
Master of Educational Leadership/ Early Childhood	24	6%	29	7%
Total	411	100%	406	100%

Most respondents employed educational leaders with nine or more years of experience (74%, 314), followed by five to eight years of experience (14%, 58).

Rates for educational leaders with nine or more years of experience increased between 2019 and 2021 (70% in 2019 compared with 74% in 2021).The following table shows educational leaders' years of education and care experience.

Table 33. Years of education and care experience of educational leader, 2019, 2021

	2019		2021	
	Count	Per cent	Count	Per cent
Less than 2 years	13	3%	7	2%
2–5 years	51	12%	46	11%
5–8 years	63	15%	58	14%
9+ years	290	70%	314	74%
Total	417	100%	425	100%

Fulfilling the responsibilities of educational leader requires time allocated specifically to this role outside of the regular time allocated to the education and care of children. Respondents were asked how much time was allocated to the educational leader each week. In 2021, more than half of the respondents (54%) allocated between two and seven hours per week to the educational leader.

One in four educational leaders were allocated over 12 hours a week outside of the care environment for their duties in 2021, higher than the rate in 2019 (18%).

Table 34. Service time allocation to educational leadership role, 2021

	2019		2021	
	Count	Per cent	Count	Per cent
Less than 2 hours	38	12%	47	13%
2–3 hours	121	37%	104	30%
4–7 hours	63	19%	84	24%
8–11 hours	46	14%	37	11%
12–15 hours	14	4%	27	8%
16+ hours	44	13%	52	15%
Total	326	100%	351	100%

While time may be allocated to this responsibility it is not always taken due to the changing needs of children attending a service. Respondents were asked how frequently their educational leader was able to take their allocated time. The majority of services reported that educational leaders *always* (60%) or *often* (212%) used their allocated time towards their educational leadership duties. It is concerning to note that 7% of respondents indicated that the educational leader never (2%) or rarely (5%) use the weekly time allocated to them.

Table 35. Frequency allocated time to the educational leader is used, 2019, 2021

	2019		2021	
	Count	Per cent	Count	Per cent
Never	12	3%	10	2%
Rarely	10	3%	19	5%
Sometimes	52	13%	46	11%
Often	71	18%	85	21%
Always	246	63%	242	60%
Total	391	100%	402	100%

There is some evidence that supports a link between using allocated educational leadership planning time and achieving a quality program. Of those services rated as Exceeding NQS, 58% of educational leaders always took their allocated time, 24% of educational leaders often took their allocated time, and only 4% of educational leaders rarely took their allocated time. Similarly, those services rated as Meeting NQS, 62% of educational leaders always took their allocated time, 19% often took their allocated time and only 5% rarely took their allocated time.

## The impact of educational leadership on other outcomes

By looking at the distribution of respondents with selected variables in different groups we can begin to see connections between these and different outcomes. Two outcome measures in TICCSS relate to service quality and collegial or positive workplaces – namely, overall NQS rating and the tenure stability measure. Overall NQS ratings refer to the most recent Assessment and Rating outcome. Tenure stability is a proxy for how satisfied staff are with working in their service. Analysis of other variables collected concerning educational leaders in TICCSS only showed very small differences when compared with outcome measures. However, the qualification level of the educational leader seems to make a difference in outcomes measuring quality and service stability.

The usual distribution of tenure stability in 2021 was 38% Very high, 31% High, 20% Low and 12% Very low. Within the cohort of services that had an educational leader with Masters level early childhood qualifications or Bachelor level qualifications, the likelihood that service would have Very high tenure stability increased to 55% and 44% respectively. Likewise, for services with educational leaders with 9+ years of experience, the likelihood of having very high tenure stability increased to 43%.

Table 36. Cohorts of services with educational leader qualification or experience characteristics, by tenure stability rating, 2021

Years of experience	Very low	Low	High	Very high
Less than 2 years	31%	23%	31%	15%
5 to 8 years	16%	18%	33%	33%
9+ years	8%	19%	31%	43%
Level of qualification				
Certificate III/ IV	23%	23%	38%	15%
Diploma in Children's Services/OSHC	18%	23%	32%	28%
Bachelor/ Degree in Early Childhood	17%	17%	31%	44%
Master of Educational Leadership/ Early Childhood	3%	21%	21%	55%
<b>Usual distribution</b>	<b>12%</b>	<b>20%</b>	<b>31%</b>	<b>38%</b>

Table note:

Proportions are calculated from total responded. Tenure stability is calculated by the proportion of staff who have been with the service for 3 years or more. *Very low* refers to less than 25% of staff having been with the service for 3 years or more, *Low* refers to 25 – 49%, *High* refers to 50 – 74% and *Very high* refers to over 75%.

Appointing a highly qualified educator to be an educational leader may lead to better outcomes in staff stability. It may also help the service to achieve higher ratings against the National Quality Standard and most importantly, better child development outcomes.

43% of services in TICSS received Exceeding in their latest assessment and rating visit. Services who had an educational leader who had these characteristics were more likely to achieve Exceeding:

- 9+ years of experience (46%)
- 8–15 hours of allocated time (47%)
- 16+ hours or more than 1 educational leader (65%)
- Often/ always using allocated time (44%)

Table 37. Cohorts of services with educational leader characteristics, by most recent NQS rating and assessment outcome, 2021

	Working towards	Meeting	Exceeding	Exceeding
<b>Years of experience</b>				
Less than 2 years	21%	45%	34%	0%
5 to 8 years	11%	49%	38%	2%
9+ years	10%	42%	46%	2%
<b>Level of qualification</b>				
Certificate III/ IV/ Diploma	17%	54%	27%	1%
Bachelor/ Masters	8%	36%	55%	2%
<b>Time allocated for educational leader out of the room</b>				
No time allocated out of the room	0%	58%	42%	0%
Less than 2 hours	18%	38%	44%	0%
2 to 3 hours	9%	55%	36%	0%
4 to 7 hours	9%	47%	38%	5%
8 to 15 hours	14%	38%	47%	2%
16+ hours or more than 1 educational leader	4%	31%	65%	0%
<b>Frequency of educational leader using allocated time</b>				
Never/ rarely	14%	46%	39%	0%
Sometimes	14%	44%	42%	0%
Often/ Always	11%	43%	44%	2%
<b>Usual distribution</b>	11%	44%	43%	1%



## Summary of impact of educational leadership on ensuring a resilient and equipped workforce

Educational leaders in not-for-profit services are well supported and equipped, with close to 90% of educational leaders allocated over 3 hours a week away from children to undertake the role in 2019 and 2021. Most services also ensure that these allocated hours are utilised, with 81% reporting that they were *Always* or *Often* used and only 3% reporting they were never used. Most educational leaders have a bachelor degree in early childhood (57%) and the next largest group are those with a diploma-level qualification (33%). This information is important for providers of diploma level certification as the preparation for this duty requires both regulatory and theoretical support. Data from services show that there are some positive links between higher qualified educational leadership and achieving NQS rating of Exceeding or Excellent. However, educational leaders with all levels of qualification have been shown to lead their services to great ratings. There are stronger associations between qualifications of educational leaders and greater whole of staff stability (tenure).



# Governance

## Not-for-profit services have stronger governance

### What we know:

- Education and care services need high utilisation rates to be viable.
- Many services are struggling with occupancy, especially long day care services, as supply is outstripping demand in many areas.
- Recruitment of teachers and educators is getting harder because of staff shortages, and because lower quality preservice training courses are impacting the quality of candidates.
- The NQF was designed to improve the quality of education and care services.

### What we found:

- Not-for-profit services participating in the TICCSS survey have high utilisation rates – two thirds are above 81%.
- Following the pandemic there are more services with lower utilisation, however, demand for not-for-profit services is relatively stable throughout the years.
- Fewer not-for-profit services are full or near full as more mostly for-profit services open.
- Like all services, not-for-profit services are finding it harder to fill staff vacancies. Over a third had staff positions vacant and three quarters found it difficult to engage early childhood teachers.
- Not-for-profit services are positive about the NQF believing it makes staff more reflective and more connected with the community.
- Not-for-profit services also find the NQF has increased their paperwork and requires more time than they have available.
- Not-for-profit services reported that assessment and rating give accurate results but some noted the process was difficult.

# Service governance

Not-for-profit services who participated in the TICCSS longitudinal study operate under a range of different governance models, including stand-alone services that operate under an incorporated committee of volunteers, services operated by local government or state/territory Department of Education, and two large not-for-profit service providers that may also provide related services such as family support. Education and care service operations are complex requiring leaders to understand a myriad of regulatory requirements – high-level relational skills working with many different children and families with different needs, high-level organisational skills managing occasionally competing jurisdictional demands, personnel skills, mentoring and development, financial skills related to day to day operations, and supporting families accessing different types of fee subsidies.

Education and care services respond to the needs of the local communities however, they are impacted by macro issues such as cost of living, rates of employment, changes to the future of work, and social policies relating to families, such as parental leave.

## Average utilisation

Average service utilisation and the number of approved child places impact on service viability. Various industry commentators suggest that 70 – 80% utilisation rates are required for a financially sustainable long day care centre<sup>25</sup>.

**In 2021, 64% of respondents reported average utilisation greater than 81%, and 77% of respondents reported average utilisation greater than 71%.**

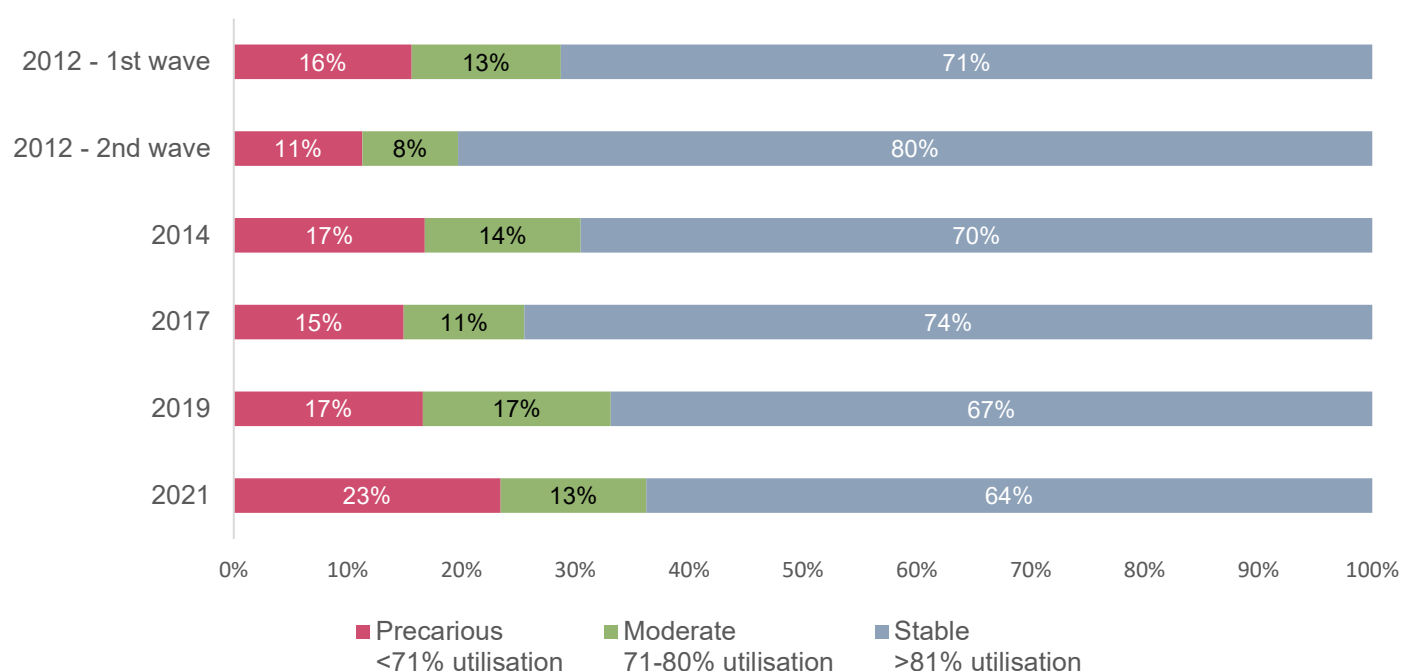
Without more knowledge about the local market and each individual service respondent, this would suggest that the majority of respondents to this question at the time of the survey are likely to be financially sustainable. The benefits of full utilisation vary by economies of scale, particularly the number of approved child places a service can provide, and the age break up of these places.

Data for utilisation-related viability are presented below, using the industry standard baselines for viability. Stable viability represents services reporting average utilisation rates of over 80%, moderate viability is those reporting 71 – 80% utilisation and precarious refers to services reporting less than 71% utilisation. Over time, not-for-profit operated services have maintained similar rates of moderate and/or stable utilisation until 2021 when utilisation decreased in response to the global pandemic – in 2021, just under a quarter of respondents (23%) reported precarious utilisation. The previous top rates were in 2019 and 2014, where 17% of services had precarious utilisation rates.

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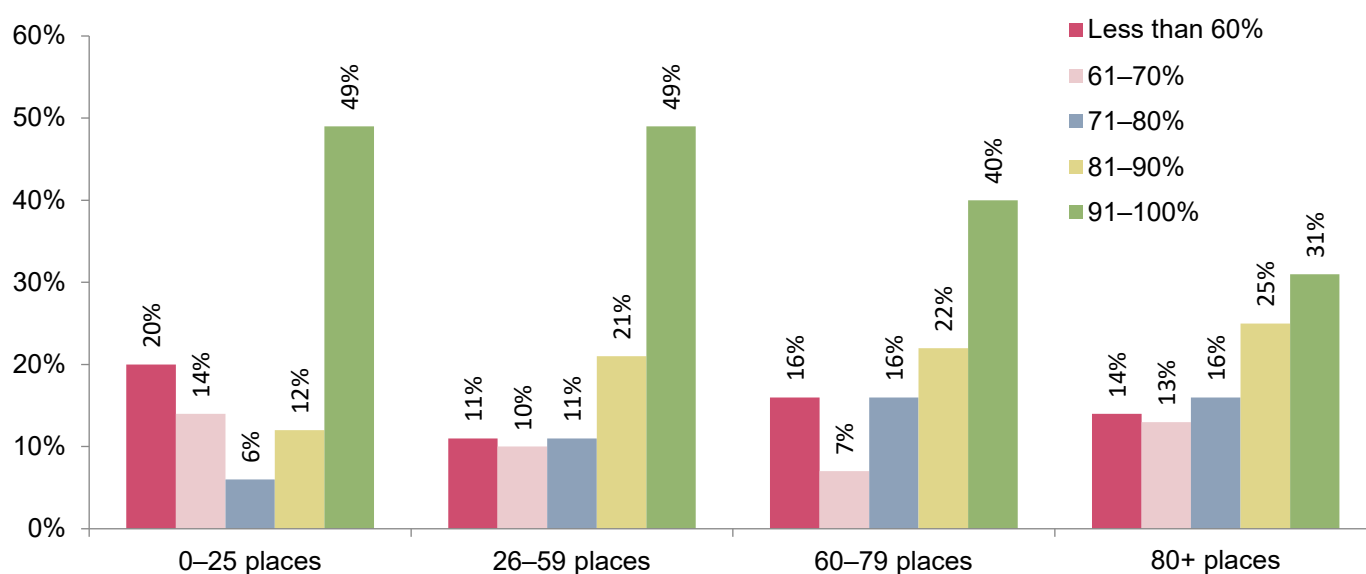
<sup>25</sup> IBISWorld; Urban Economics (2018), Occupancy and Performance Appraisal: Early Childhood Education and Care Sector, p. iii

Table 38. Utilisation-viability measure, 2012 to 2021



Utilisation also varied by service size. Larger services (80+ places) were less likely to report utilisation of 91–100% (31%), compared with services with fewer places, but were more likely to report utilisation of 81–90% (25%) than smaller services. In economies of scale, utilisation may have less impact on larger services, as long as they can maintain meeting their embedded and distributed costs. Services with less than 25 places were the most likely to report having less than 60% utilisation (20%) compared with larger services, however as the majority of these were single educator OSHC models (which are frequent in OSHC), many costs for administrative functions may have been absorbed and distributed by parent organisations.

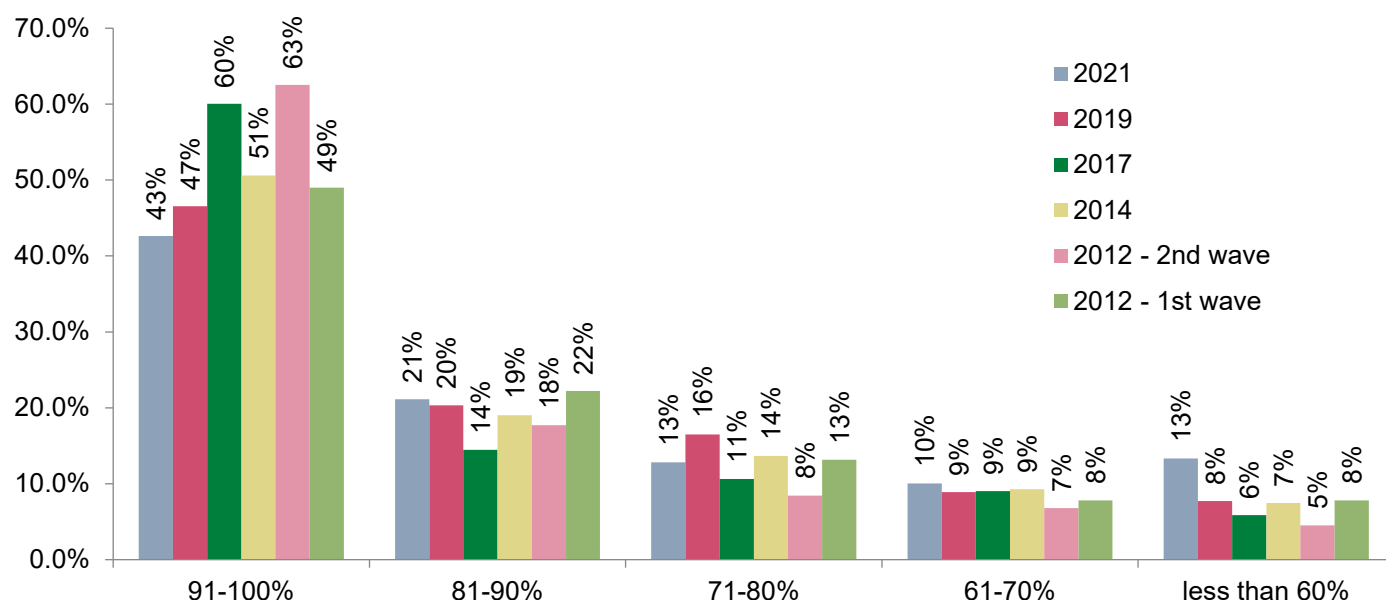
Table 39. Average weekly utilisation by service size, 2021





In 2021, under half (43%) of respondents were operating at full or close to full capacity. This was the lowest rate across the time TICCSS has been collecting data and was down from 47% in 2019 and 60% in 2017. More services reported very low utilisation of less than 60% in 2021 than ever before, with one in eight TICCSS respondents reporting that this was the case for them (13%).

Table 40. Average weekly utilisation, 2012 to 2021



Remoteness impacted on utilisation – the more remote a service the lower the average weekly utilisation. Services in Inner Regional areas were more likely than those in other areas to report utilisation above 81% (73%), compared with those in Major Cities (61%), Outer Regional areas (65%) or Remote/ Very Remote (60%).

Table 41. Average weekly utilisation by remoteness of respondent, 2021

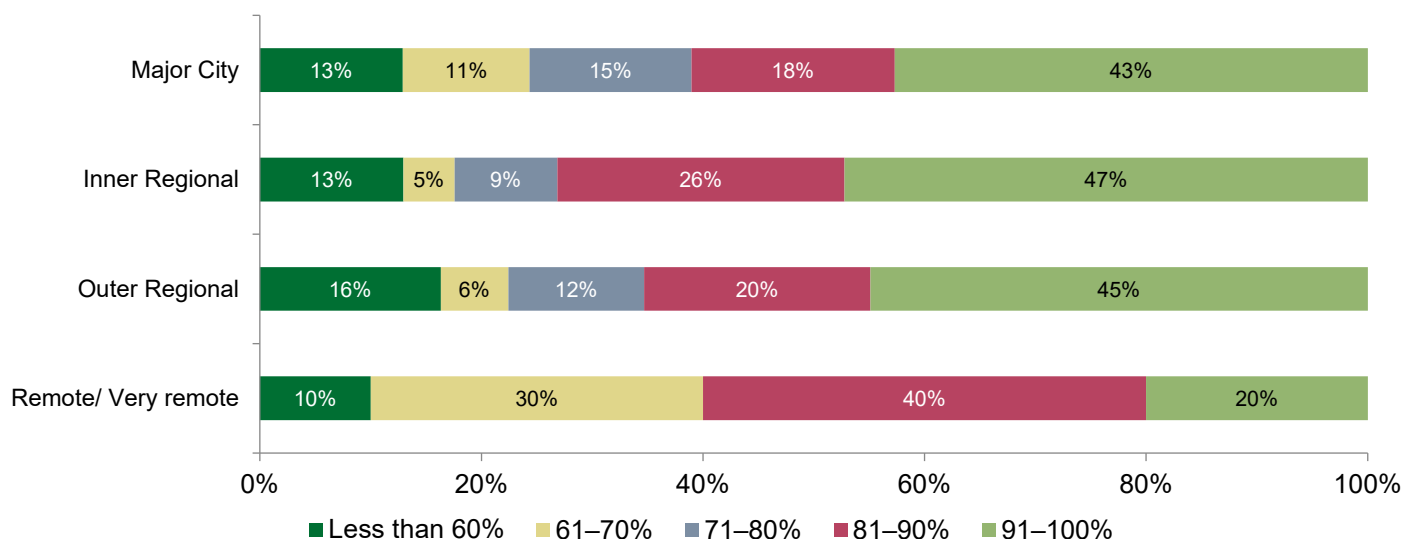


Table note:

'Remoteness' is formulated using the ABS – ASGC areas by postcodes. Responses for Very remote and Remote have been combined due to low numbers.

## Recruitment of educators

**In 2021, just over one third (35%) had current vacant positions – the highest rate across the implementation of the TICCSS longitudinal study.**

Data from The National Skills Commission (NSC) showed that during the pandemic peak in May 2020 vacancies for child care roles decreased to 34% of what they were in September 2019. By November 2020, rates had increased back to their pre-pandemic level and have since increased to 130% of what they were in September 2019<sup>26</sup>.

Table 42. NSC, child carers' vacancies October 2019 to March 2021 (Proportion of September 2019 vacancies)

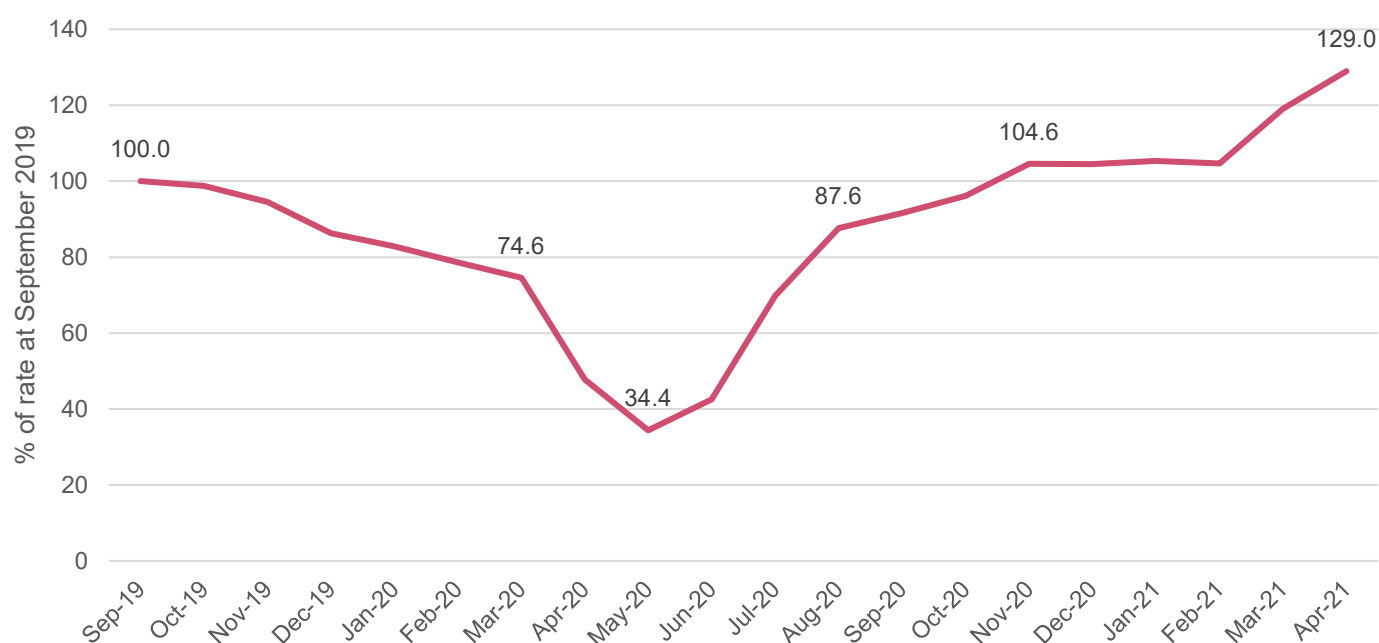


Table note:

Data for this graph are from the National Skills Commission, Vacancy Report<sup>27</sup>.

<sup>26</sup> Department of Education, Skills and Employment (2021) Vacancy report.  
<https://lmip.gov.au/default.aspx?LMIP/GainInsights/VacancyReport>



## Current vacancies

Just over a third of respondents to this question (35%, 173) had teacher or educator positions to be filled. This is higher than in all previous survey waves, with 28% in 2012 – wave 1, 27% in 2012 – wave 2, 22% in 2014, 28% in 2017 and 31% in 2019.

Across all waves of TICCSS, most vacancies have been for certificate III, certificate IV and diploma-qualified educators. The profile of vacancies by qualification has been similar across survey waves, except for a spike in vacancies for degree-qualified vacancies, which rose to 18% in 2019. This may reflect the requirement for a second ECT in most jurisdictions. There has been a small upsurge in diploma qualification vacancies following the previous decline from 2012 to 2019/2017.

Table 43. Service employment vacancies, 2012 to 2021

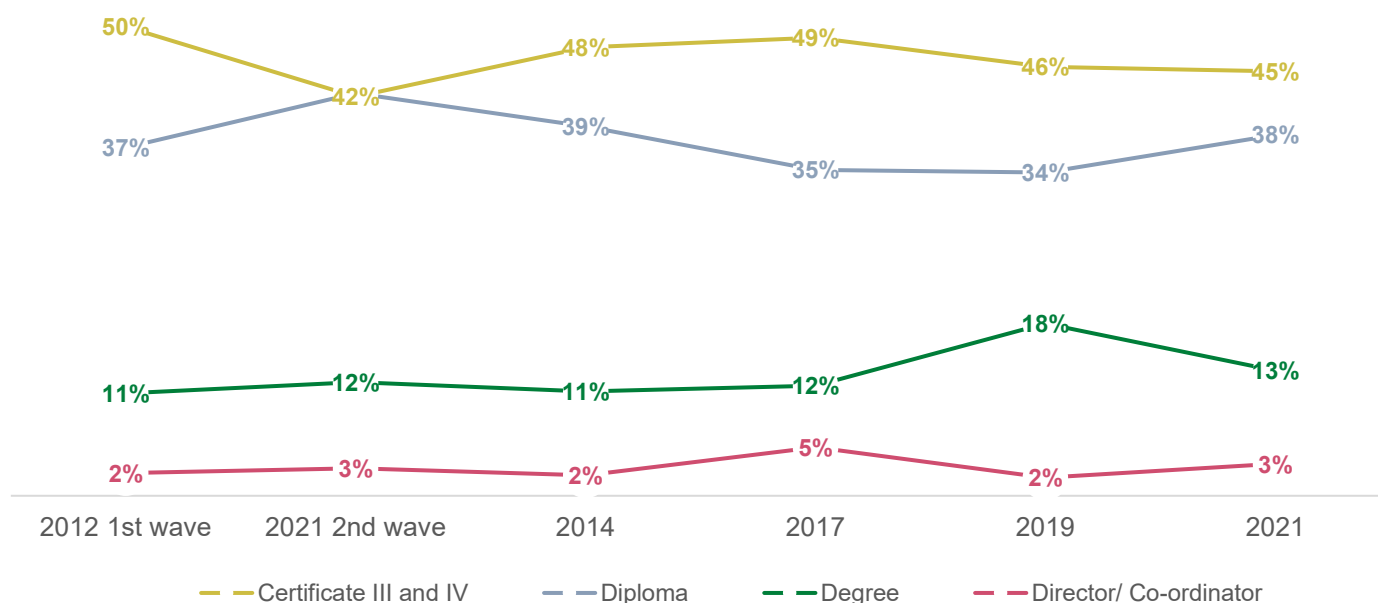


Table note:

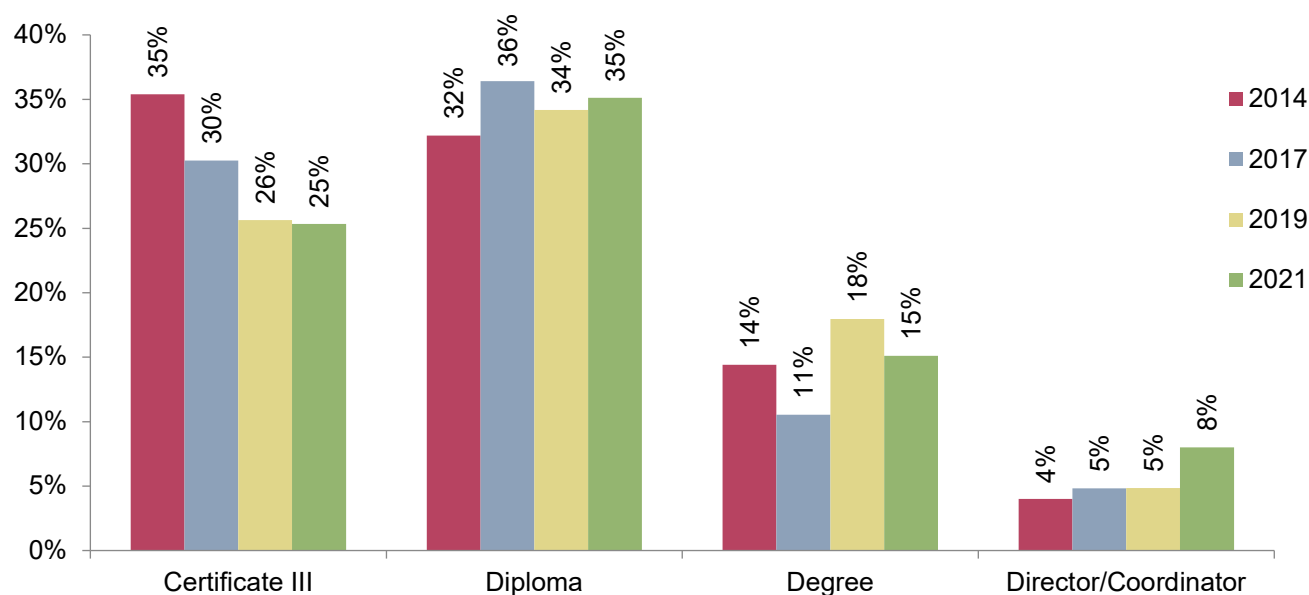
Proportions are of the total number of educator/ director vacancies.

## Most recent recruitment

Less than half (46%, 224) of respondents to this question had recruited for an educator or director/coordinator in the last six months. This is a large decline from 70% in 2019 and reflects the impact of the global pandemic on respondents.

In 2021, there was increased demand for director/coordinators (from 5% in 2019, to 8% in 2021) and diploma qualified (from 34% in 2019, to 35% in 2021). There was decreased demand for degree qualified early childhood teachers in 2021, following a peak in 2019, possibly to meet the regulatory requirement for a second teacher in some EC settings.

Table 44. Recent recruitment by qualifications

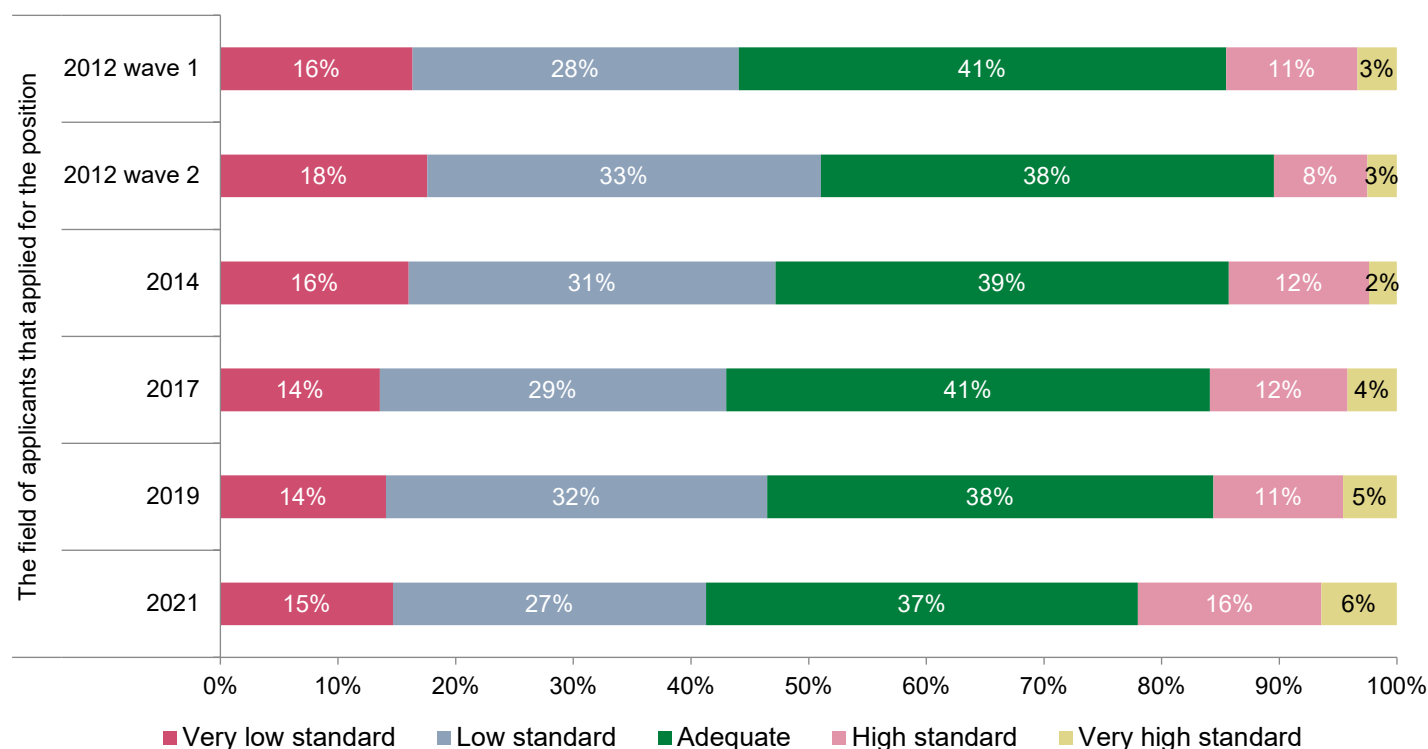


## Standard of applicants

Respondents were asked to consider the standard of applicants for their most recent recruit.

In 2021, 22% of respondents felt that the field of applicants was of a high or very high standard. This is a slight improvement from all previous waves and may reflect recent reviews on children's services vocational training competencies. It is dispiriting to see that 42% of respondents still consider the field of applicants to be of very low or low standard.

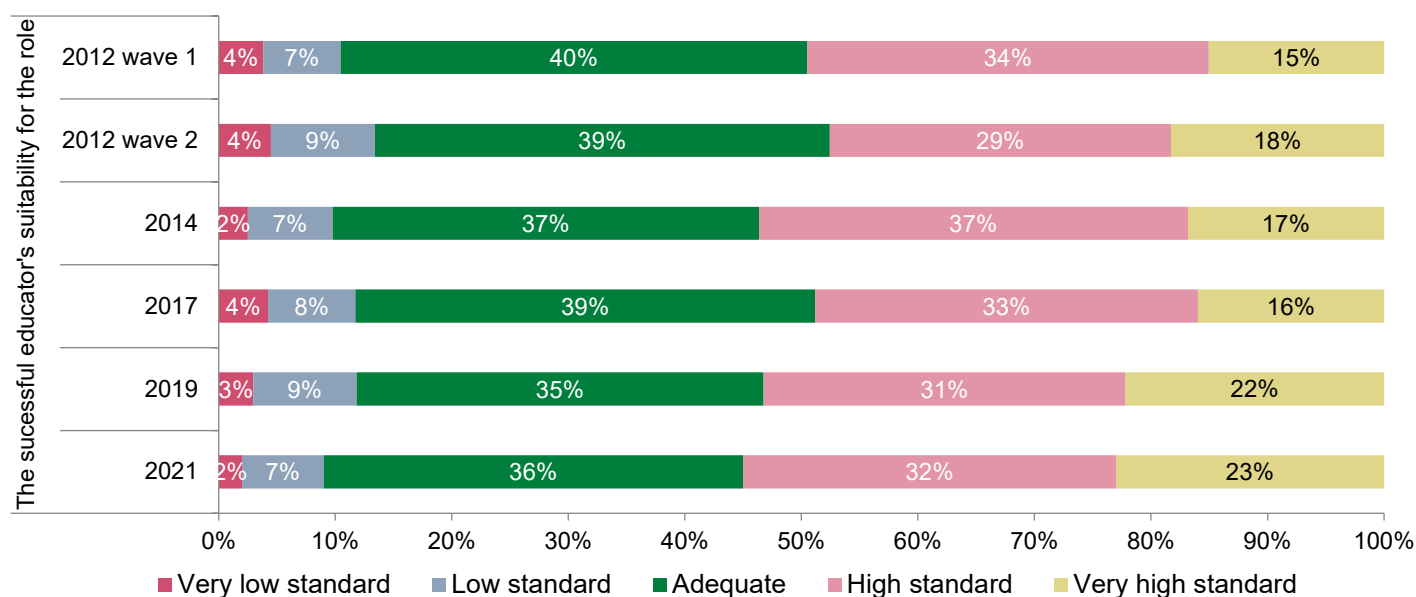
Table 45. Standard of the field of applicants to most recently recruited position, 2012 to 2021



## Successful applicants suitability for the role

In 2021, just over half of the respondents to this question (55%) considered the successful educator in their most recent recruitment process to be of a high or very high standard with regard to suitability for the role. Only 9% considered the successful educator to be of very low or low standard in relation to suitability. This is to be expected, as it is unlikely that respondents would employ someone poorly suited for the role.

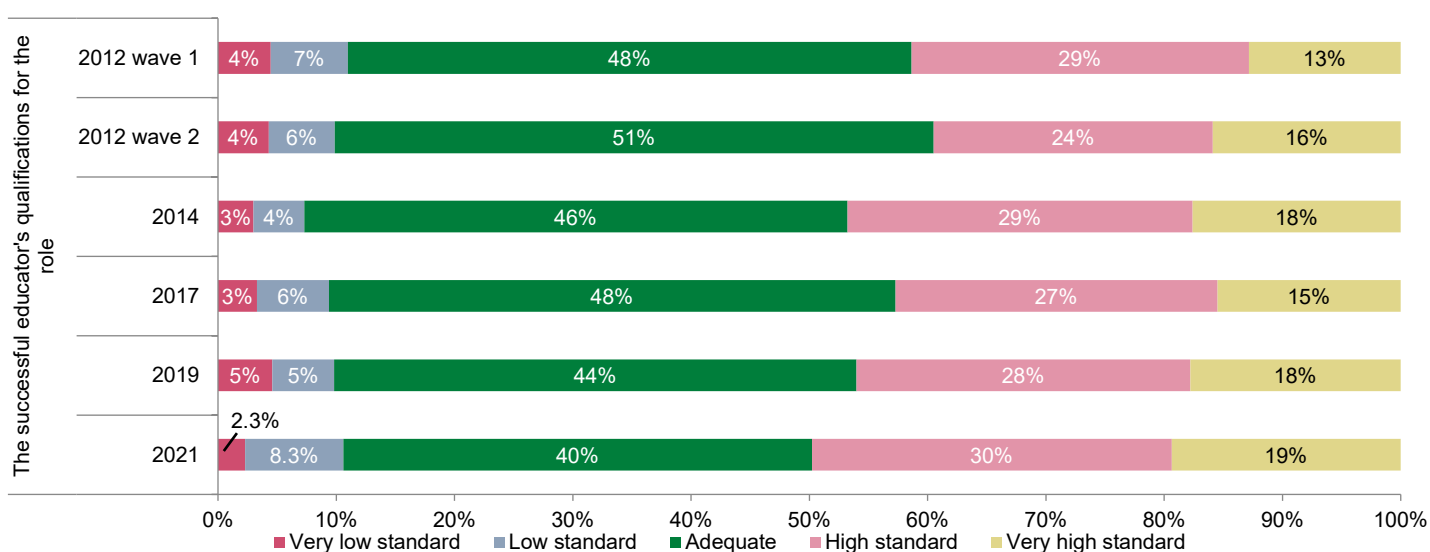
Table 46. Standard of the successful educator's suitability for the role



## Appropriate qualifications for the role

The following table shows that there has been very little variation with regard to the standard of the successful educator's qualifications for the role over all survey waves.

Table 47. Standard of the successful educators' qualifications for the role

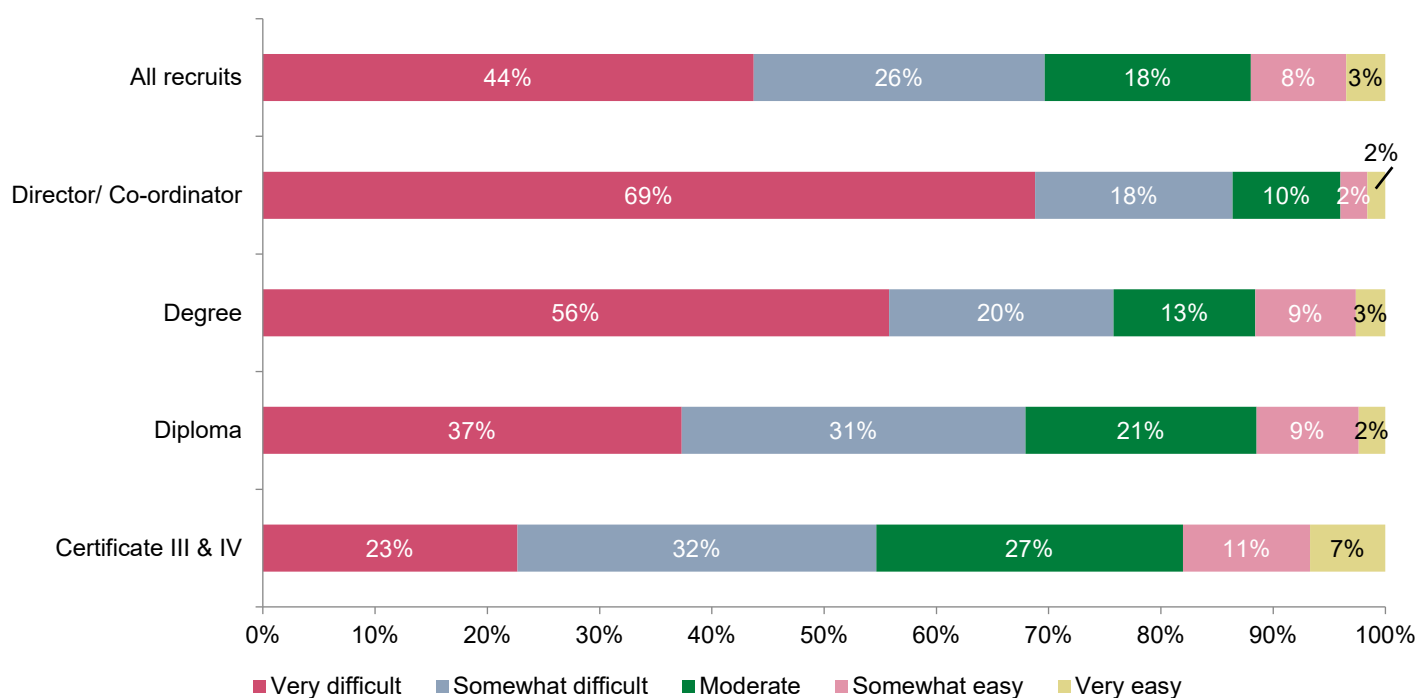


## Difficulty recruiting

Despite the greater satisfaction with the suitability of applicants for diploma and degree-qualified educators, respondents continue to report greater difficulty recruiting for higher qualifications and more senior positions.

In 2021, directors/coordinators are very difficult to recruit (66%) and just under half (47%) found it very difficult to recruit a teacher. By contrast, only 16% of respondents found it very difficult to recruit certificate III or IV educators.

Table 48. Difficulty recruiting at different qualification levels – 2021



Across all survey waves, there is some variation in the difficulty of recruiting by type of qualification. Most notably in 2021, it seems it was more challenging than in previous waves to recruit certificate III and IV educators, although still easier than recruiting for more qualified positions. In 2012 – wave 1, 19% of respondents found it *very easy* to recruit certificate III and IV educators, however in 2021 only 7% found it *very easy*.

Over time, degree-qualified teachers and directors/coordinators continue to be difficult to recruit, although it is interesting to note that in 2021 there has been an increase in difficulty for degree qualified educators, with 56% of respondents reporting that it was *Very difficult*. This follows a previous downward trend. In 2019, only 47% of respondents to this question had difficulty recruiting degree-qualified staff compared with both waves of 2012 (62% and 66% respectively), when the first round of qualification changes impacted particularly around the employment of degree-qualified teachers. Given the significant early childhood workforce shortages currently being experienced particularly, for degree qualified early childhood teachers, it appears that the events of 2020 have made this problem more difficult.

Respondents were asked to consider the top three factors that may make it difficult for them to recruit. The following table shows the top factors in 2021 and in previous survey waves that respondents identified as impacting their ability to fill positions.

Table 49. Factors that impact on ability to recruit

	2012 1 <sup>st</sup> wave	2012 2 <sup>nd</sup> wave	2014	2017	2019	2021
Low number of applicants	–	–	–	2	2	1
Applicants have completed qualifications with private Registered Training Organisations and are not suitably skilled	–	–	1	1	1	2
Applicants lack of understanding of the National Quality Standards	–	–	–	–	3	3
Applicants are not qualified						4
Working hours	3	3	4	5	6	5
Low wages	1	2	2	4	4	
Applicants are not [suitably skilled 1st & 2nd waves] qualified	2	1	3	3	5	

Table note:

Blanks indicate that this option was not available in a particular survey wave.

Over the three most recent survey waves, respondents to this question identified that the top issue continues to be:

- 'Applicants, having completed qualifications with private Registered Training Organisations (RTO), are not suitably skilled'
- 'Low number of applicants' was ranked second over the past two surveys (when this option was asked)
- A new option in 2019 was 'Applicants' lack of understanding of the NQS" and this again rated third most difficult in 2021.

For the first time since 2012, 'Low wages' did not rank in the top five factors that made it difficult for respondents to fill positions. In 2020 and 2021 demand for educators is outstripping supply. Some reasons for this include:

- The halt in overseas immigration for skilled workers for the sector during the COVID-19 pandemic<sup>27</sup>.
- Having fewer people entering, completing, and graduating from early childhood or OSHC qualifications since 2015<sup>28</sup>.
- Educators leaving the sector to work in other industries, particularly the school sector<sup>29</sup>.

In 2021, many respondents to this question talked about the applicant's lack of experience and also noted the following factors that made it difficult to recruit:

### Difficulties in recruiting

*"It's difficult to compete with private sector of FDC when they have no overhead expenses. Other services offer cheaper start-up costs for new educators. Community-based not-for-profit no longer funded and currently run at a loss of income".*

*"In South Australia we are only able to find university students who leave after one or two years. There are not enough OSHC hours to give, or to make a career or full time job out of it".*

*"We recruit new employees from students that we accept from RTO's, TAFE, and University. We invest in the students training through mentoring and if they are a service and cultural fit, if they are ethical, child focused and with potential, we employ the completed student on a casual contract as we continue to engage in their continual improvement. This is the way we employ new staff – not by advertising. We have excellent employment conditions, programming provision and high educator to child ratios, making us a sort after employer".*

*"There is a lack of suitable housing in our remote location".*

*"Many of the Certificate III applicants have completed the course but have no actual experience working in the sector, or their written skills are below an acceptable standard".*

*"None of these are really applicable. We usually judge on whether the person will be a good fit and will work well with the rest of the team".*

<sup>27</sup> ABS (2021) overseas arrivals and departures, Australia. <https://www.abs.gov.au/statistics/industry/tourism-and-transport/overseas-arrivals-and-departures-australia/latest-release>

<sup>28</sup> National Children's Education and Care Workforce Strategy, ACECQA (2021) Workforce supply. *Workforce snapshot*. <http://snapshots.acecqa.gov.au/workforcedata/supply.html>

<sup>29</sup> National Children's Education and Care Workforce Strategy, ACECQA (2021) Weekly earnings by occupation. <http://snapshots.acecqa.gov.au/workforcedata/index.html>

## Use of casual staff

More than three quarters (85% 435) had employed casual staff in the past 12 months.

Respondents employed casual staff prior to March 2020 and the onset of the global pandemic and continue to employ a casual staff now. Some respondents commented that they use casual staff from 10 to 30 hours per week, although it was noted that the use of casuals declined significantly during the height of the pandemic. In most circumstances, casual staff would not have been eligible for JobKeeper.

More analysis on TICCSS data for casual employees is in the chapter *Spotlight on the Impact of COVID-19; Impact on casual educators*.

## Experiences implementing the National Quality Framework

The NQF has been one of the most significant changes in the education and care sector in the last decade, requiring improved child staff ratios, minimum qualifications, continuous improvement, and enhanced quality rating systems. It is a significant partnership between Australian and state/territory governments, and for the first time embraces all major education and care service types. For these reasons, it is important to understand and track the impact of the NQF on education and care services.

In this section of the report, we asked respondents to identify the positive impacts and issues with the NQF on their services along with changes in quality ratings, educational leadership and waivers. We also asked respondents about their perceptions of their most recent assessment and rating process.

## Highlights

**Overwhelmingly, respondents noted that their top highlight over the past year was that their service had responded to COVID-19 while continuing to meet the needs of children and families. Respondents also noted that their key highlights included educators' reflective practices and their strong focus on meeting individual children's needs.**

In 2021, respondents felt that the NQF highlights were that:

- Services responded to COVID-19 and continue to meet children's and families' needs.
- Educators regularly engage in reflective practices.
- Services were more focused on meeting individual children's needs.
- Educators were more interested and engaged in programming and planning.



These responses are not surprising considering the impact that COVID-19 had on services. Education and care services proactively responded to the changing needs of children and families throughout the pandemic, focusing strongly on child and family engagement in innovative ways, particularly considering that some children participated in educational programs online. Teachers and educators were also supporting children's mental health and wellbeing, which requires strong and in-depth program planning and reflection.

Over the past four survey waves 'educators regularly engage in reflective practices' has consistently been one of the top three highlights for respondents to this question. Reflective practice is the cornerstone of improved teaching in education and care services, and is one of the key principles of *Belonging, Being & Becoming, The Early Years Learning Framework for Australia*.



Table 50. Top three highlights experienced in the last 12 months, 2014, 2017, 2019 and 2021

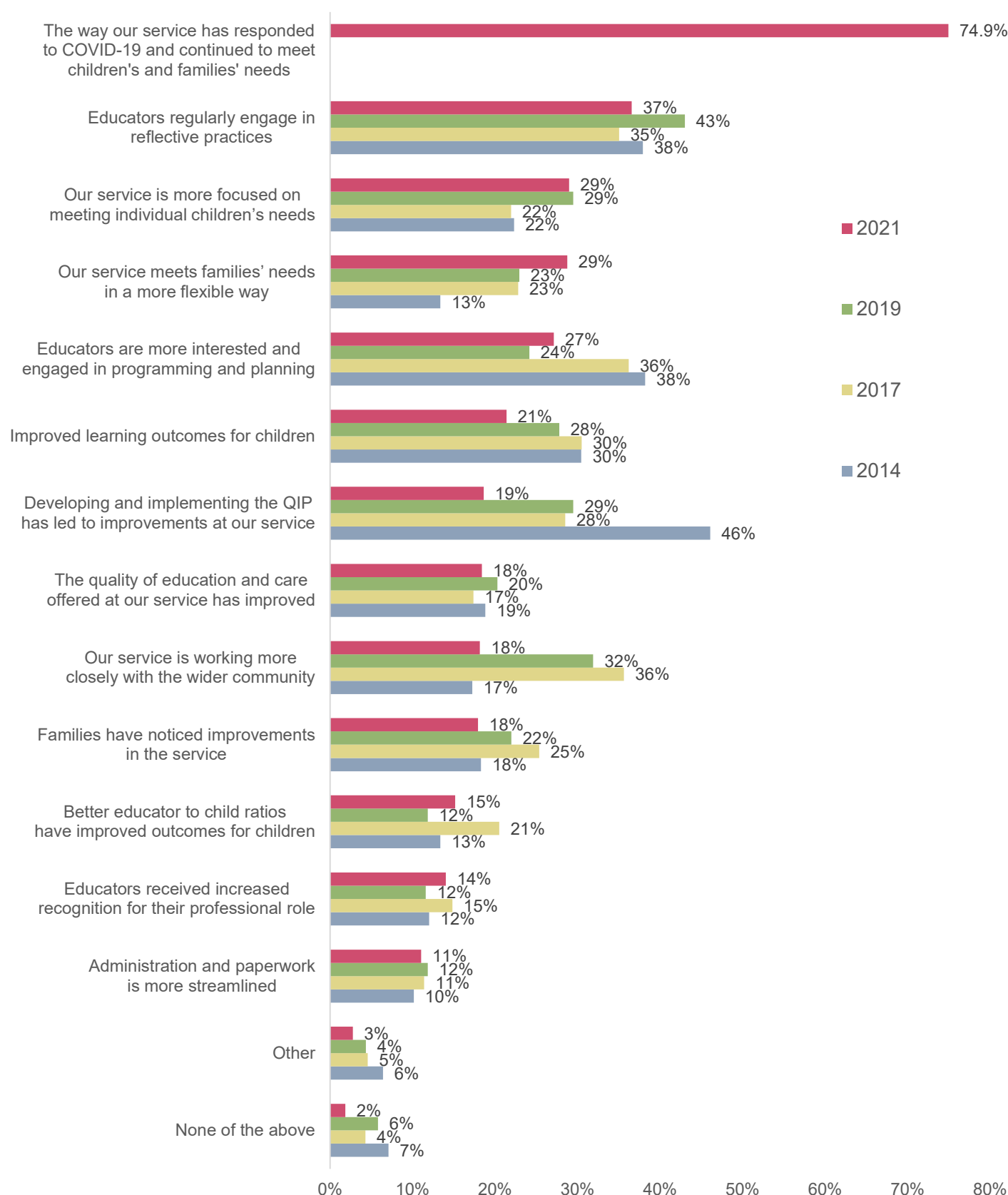


Table note:

Proportions are calculated from the total number of responses for this question.

## Issues and concerns

Table 51. Top three concerns experienced in the last 12 months, 2014, 2017, 2019 and 2021

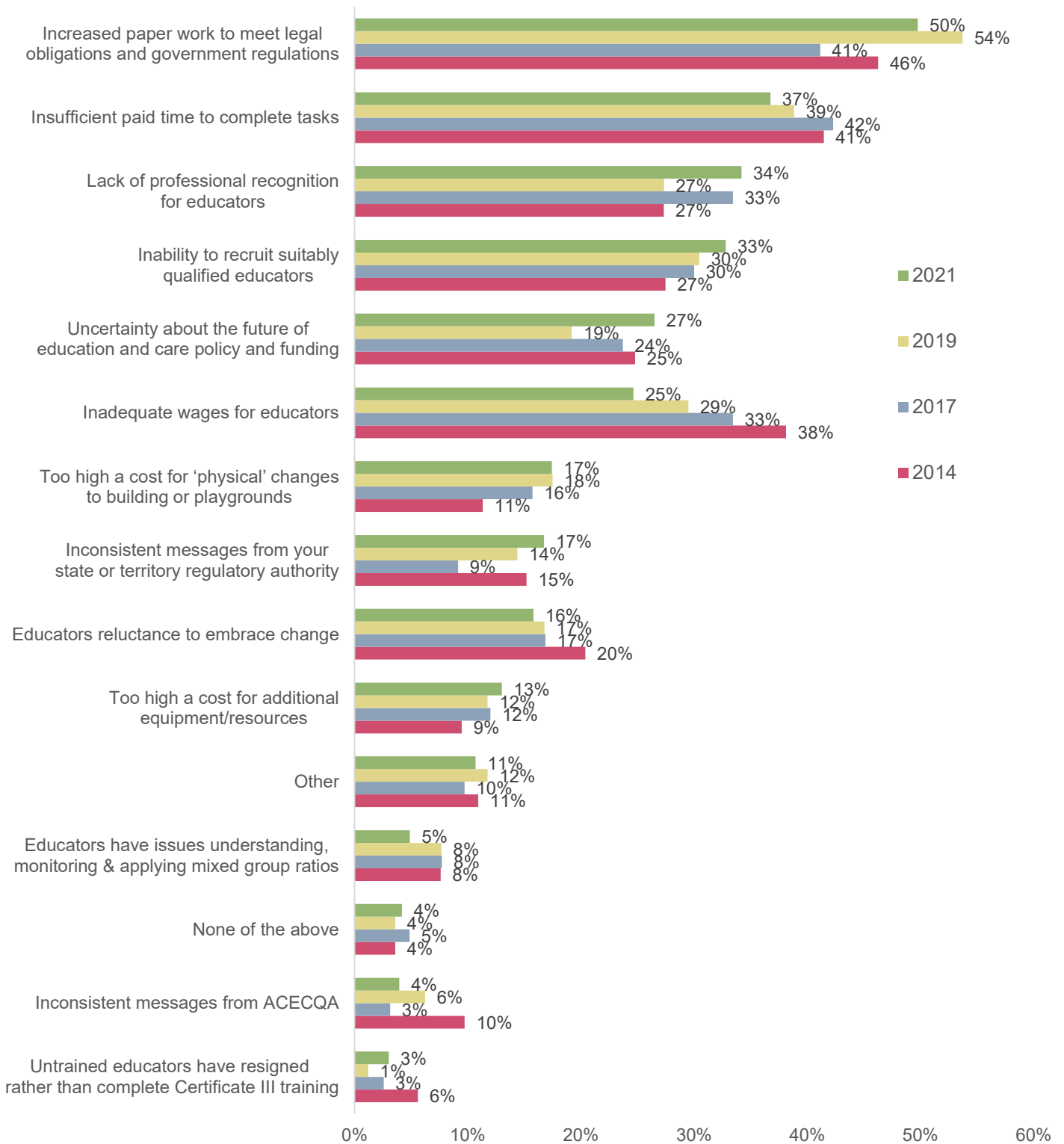


Table note:

Proportions are calculated from the total number of responses for this question.

In 2021, respondents reported their top concerns with the NQF:

- Half (50%) said it had increased paperwork to meet legal obligations and government regulations.
- Over a third (37%) said they had insufficient paid time to complete tasks.
- A third (34%) said the lack of professional recognition for educators.
- A third (33%) said the fact they were unable to recruit suitably qualified educators – the response for this indicator is the highest since 2014.

These are the same top four issues as 2019, 2017 and 2014 although the order differs in each survey wave.

There has been an increase in the proportion of respondents who selected '*Uncertainty about the future of education and care policy and funding*'. In 2021, over one in four (27%) respondents indicated that this was one of the top concerns for their service – compared to 19% in 2019. This reflects the general uncertainty about the medium and long-term impacts of the pandemic on the education and care sector.



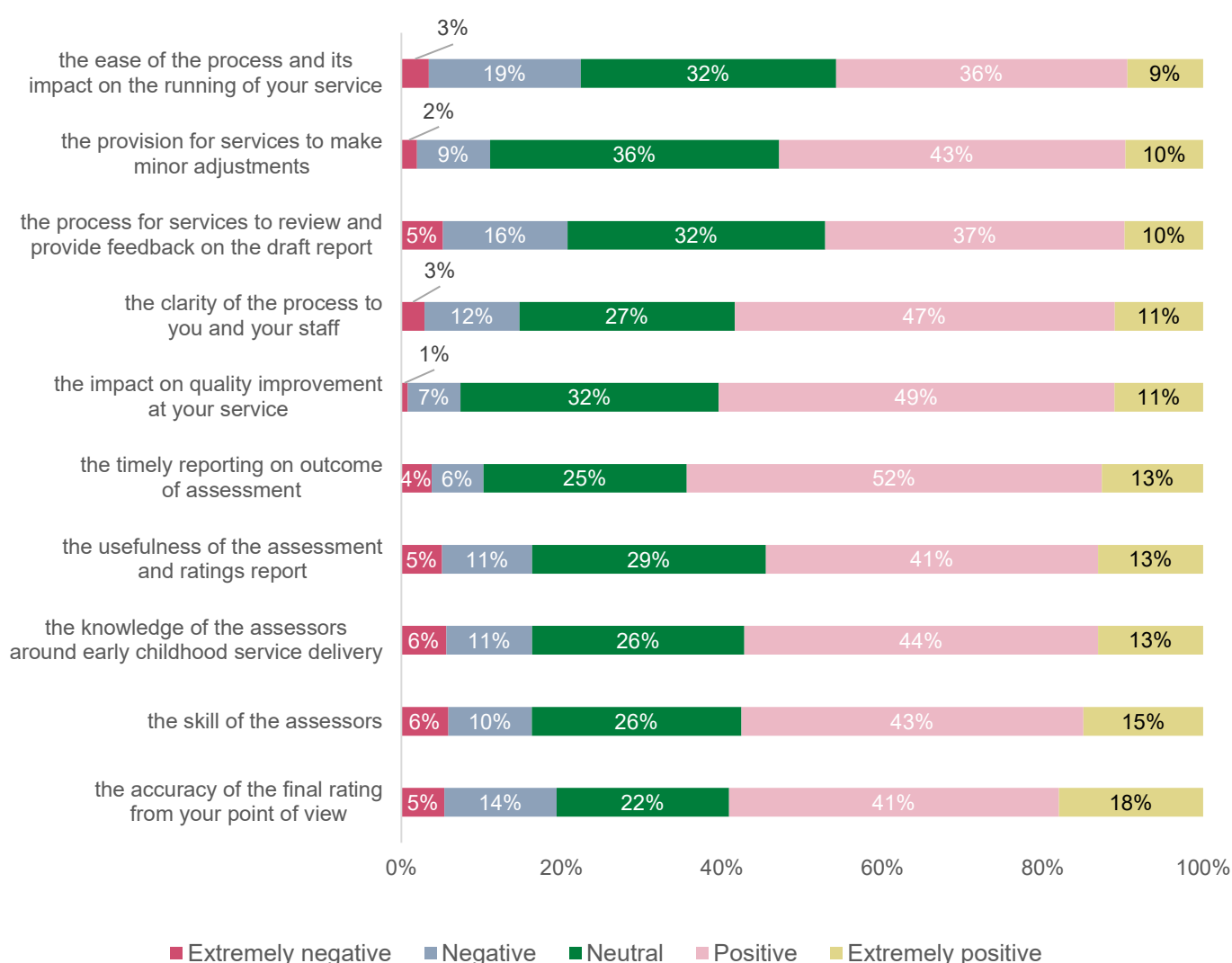
## Perceptions of assessment and rating process

Services are assessed under NQS through Assessment and Rating visits. TICCSS respondents were asked to consider their experience with the most recent assessment and rating process from extremely negative to extremely positive.

**In 2021, the largest proportion of respondents viewed each aspect of their most recent assessment and rating process as positive.**

The following table shows the respondents' perceptions of the most recent assessment and rating process.

Table 52. Perceptions of the most recent assessment and ratings process



- Extremely positive response was for 'The accuracy of the final ratings from your point of view' – 18%



- Positive response was for 'The timely reporting on the outcome of the assessment' – 52%
- Neutral response was for 'The provision of the services to make minor adjustments' – 36%
- Negative responses for 'The ease of the process and its impact on the running of your service' – 19%
- Extremely negative responses for 'The skill of the assessors' – 6% and 'Knowledge of the Assessors around early childhood service delivery' – 6%

Some respondents also provided additional comments regarding their perceptions of the most recent assessment and rating visit. While there were some positive comments, these were significantly outweighed by expressed concerns.

### **Accuracy of rating**

“The process does not allow for the feel of the centre, the heart and soul. I find it disappointing.”

“Misinterpretation of what was said to the assessor and what was put in the report.”

“Assessors did not engage or talk with any staff member other than the Director or Education Leader.”

“The assessor at least had Early Childhood experience and knowledge. Many do not. Our report felt generic and felt non-specific to our service. The time, energy, and heart that we put into our schools deserves the time, energy, and heart of our assessors to know our work, our schools, and report to support us contextually. In the past we have received a report that was so clearly about another service.”

“Due to the unique nature of our programs and delivery model there were multiple 'misunderstandings' that were time consuming to address through appeals.”

### **Impact of the assessment process on staff**

“A pending assessment causes staff so much stress, and the amount of paperwork that is required of educators are completely unrealistic when we are employed to work with children and families. It's impossible to do both effectively without something giving. Our priority is always the children and their families.”

“For a process that was developed to be a collaborative process, I found it to be punitive, and there are extreme differences between assessors. No standardisation. An extremely stressful and demeaning experience.”



**Clarity  
about the  
process and  
standards**

*"We found the experience second time round negative, stressful, and distant – and more a compliance visit than an A&R visit. The timing was extremely difficult as notification came in during the holiday period, and then the final report was issued on the last day of the year. Then trying to seek a review, we were shut out of the portal as they had a system issue over the Christmas holidays, no IT people were working to assist us with getting this fixed. I pursued the review and finally got an improvement in our rating, but still felt this was not satisfactory to our service. Previously we received 'exceeding' in all 7 areas, and this time 'meeting' in three areas, but overall were rated exceeding. In the end I gave up and felt we just had to settle with what was our final report and rating. I am sure many other services may have given up earlier as the stress over the IT issue took a great deal of determination and persistence."*

*"It was a terrible experience which has left us reeling even after two years. The assessor was unprofessional and actually lied about her hours of attendance at our service. She used comments in our report which had clearly been cut and pasted from another report and were obviously not related to our service. Our complaints as a result to DoE were completely ignored, and the whole experience has left us with such a bad feeling. The only positive thing is that the process now seems more streamlined and many of the changes around support and consistency which we suggested seem to now be implemented. We just hope to be reassessed soon so we can have a better experience with results which accurately reflect our service."*

“

*"There was insufficient time and training on the recent changes to the A&R, coupled by the lack of authentic assessment by the assessor."*

*"The goal posts keep changing, services have to continually research what focus the A &R is and find ways to achieve the exceeding elements. There needs to be more sharing about what practices need to be adopted to achieve excellent."*

*"We were told that the assessor couldn't tell us why we were 'meeting' in 2 areas, but it was our responsibility to provide more comment/evidence. If we don't know what in particular the problem was, it is difficult to respond."*

“

*"Our assessor expected the team to show her everything. She rated us low on areas she did not observe or ask for evidence. This was a very different experience from our previous years. They expected too much to be sent in and in short turnaround time."*

**Comments  
about  
particular  
processes**

*"Our most recent assessment was conducted by an officer from outside of our local area – I think this is a very positive component of the process as it negates any pre-knowledge bias of A&R staff."*

*"We felt that we could have provided more evidence to the officer prior to our draft report to alter our rating prior to receiving it, rather than after and then having our rating altered."*

”

**Attitude or  
behavior of  
assessors**

“

*"I am sick of being contacted in early January for notification of A&R and/or compliance visits. This has happened twice in 2 years, when we are closed (we are closed 4 weeks annually). This is my only holiday of the year and I do not think it is fair to schedule these visits for the last week of January or early February for vacation care programs. Hence, I have had to cut holidays short to prepare as I am the only one that can complete these tasks."*

*"The assessor said that an educator was too old, and that she didn't like stand-alone services, and suggested we should join a network of services."*

*"The impression the authorised officer gave was disinterested".*

”

**Knowledge  
about the  
diversity of  
models in  
the sector**

“

*"As a Family Day Care (FDC) service we find that the assessors have limited knowledge of the model and have no experience working in FDC. We have a large service with over forty Educators, but only three were visited for approximately 1 hour each. So only 3 hours were spent viewing the actual delivery of education and care (with over 120 children in care that day) which I find hard to fathom. On the days of Assessment and Rating we had Educators of all different qualifications working, but only Certificate II educators were chosen to represent the service. Although the assessors spent time with the coordination unit we were unable to produce evidence to support our QIP, as the Assessors ran out of time. We were told to upload any further evidence to the portal but we had all of this in hard copy in portfolios, and this was just impossible to achieve."*

*"As an Occasional Child Care Centre and having a unique operational model when compared to long centre based care, I worry that future assessors do not take this into consideration especially with Quality Area 1."*

*"I strongly believe that the assessment and rating visit does not understand the specific unique workings of OSHC, particularly in terms of program planning."*

**Positive  
comments  
about A&R**

*"We had a great assessor, but have also had experiences with assessors who do not 'get' OOSH. A&R needs to also spend time with the executive committees in parent run services so they get to understand their role and responsibilities."*

*"The Assessment and rating process is a fabulous way for our Preschool to reflect and improve on our service, to receive feedback, and be acknowledged for our commitment to Early Childhood Education and Care."*

*"The assessor the second time around was much more professional, objective and thorough. She made staff feel at ease and was really assessing us holistically. A very different experience from our first."*

*"We are currently waiting for feedback from our A & R. The days with the assessor were positive and came from a strengths perspective."*

*"We found that our first assessment was very disappointing and very stressful. We were very nervous about our next assessment, but when our assessor arrived she was very friendly and made the process a lot less stressful."*

*"We have undertaken partial assessments lately and it seems to be better, to evaluate specific areas. It is more clear and easier to implement any recommendation. The last assessor was really supportive and as it was during the pandemic, she even brought us some "freebies"! The Education Department's support during the pandemic was extraordinary, they maintained regular contact on the phone and we felt a nice supporting presence."*

*"We were very happy with the ACO who attended our service. She worked very closely with us to try and identify practice to get us across the line for the one element we received a working towards rating for."*

## Summary of service governance

### Utilisation management

In 2021, 64% of respondents to this question reported average utilisation greater than 81%, and 77% of respondents to this question reported average utilisation greater than 71%. In 2019, 83% of respondents reported average utilisation greater than 71%. The impacts of the global pandemic are still being played out in services, as families work patterns change and adapt in response to COVID-19.

### Recruitment trends and their impact on service governance

In 2021, over one third of respondents had vacancies, and most of these vacancies were for certificate III and Diploma educated staff (which have started to make up the largest proportion of the typical staffing profile). Just under half (46%) had recruited in the last six months, and this is a significant decline from 70% in 2019.

There was increased demand for directors/coordinators and diploma qualified staff, and decreased demand for degree qualified early childhood teachers.

Respondents rated the 'Low number of applicants' to most challenging issues with recruitment, followed by the consistently rated issue with 'Applicants have completed qualifications with private Registered Training Organisations and are not suitably skilled.'

### Perceptions of implementing the National Quality Framework

Services noted that the way their service responded to COVID-19 and continued to meet children's and families' needs, and educators regular engaging in reflective practice, were their key highlights in 2021. Services topmost concerns have been similar since 2014, with the most prominent being the increased paperwork to meet legal obligations and government regulations.



# Appendix A: NQF and other context

## About the National Quality Framework

In 2009, the Council of Australian Governments released a national Early Childhood Development Strategy – *Investing in the Early Years* with an ambitious objective that “by 2020, all children will have the best start in life to create a better future for themselves, and for the nation”<sup>30</sup>. Underpinning this objective were key outcomes focusing on young children’s developmental pathways, participation by parents in their children’s early learning, and the provision of services that support workforce participation of families<sup>31</sup>.

Supporting young children’s developmental pathways included children being engaged in, and benefiting from, educational opportunities that establish skills for lifelong learning, enhancing social inclusion, and reducing disadvantage, especially for Aboriginal and Torres Strait Islander children.

Educational opportunities were to be delivered, in part, through high quality education and care services that were integrated, responsive, interdisciplinary, child aware, inclusive, accessible, and providing universal and targeted services as needed.

## National Quality Framework

The high quality education and care outcomes of the Early Childhood Development Strategy were actioned through the *National Partnership on the National Quality Agenda for Early Childhood Education and Care* endorsed by all State/Territory and the Australian Government. The National Quality Agenda, outlined in the NQF, commenced on 1 January 2012 which aimed: “to improve educational and developmental outcomes for children attending services provided under the National Law”<sup>32</sup>. The National Quality regulatory framework includes:

- Education and Care Services National Law Act 2010 as the overarching legislation.
- The Education and Care Services National Regulations 2011 as the Underpinning regulatory framework.
- The National Quality Standard for Early Childhood Education and Care and School Age Care (NQS) that sets national benchmarks for the quality of education and care children receive at services.
- Two national curriculum frameworks that articulate pedagogy and intentional teaching as key underpinnings of the NQS – *Belonging, Being & Becoming; The Early Years Learning Framework for Australia* for children aged from birth to five years and *My Time, Our Place: Framework for School Age Care in Australia* for primary school

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<sup>30</sup> *Investing in the Early Years-A National Early Childhood Development Strategy*, (2009), p. 13

<sup>31</sup> *Ibid.*, p. 13

<sup>32</sup> National Partnership on the National Quality Agenda for Early Childhood Education and Care -2015–16 to 2017–18, p. 2

age children attending out of school aged care services. Additionally, some states/territories retained existing curriculum frameworks, and

- An assessment and quality rating process.

The NQS is monitored by the Australian Children's Education and Care Quality Authority (ACECQA), an independent national authority whose role includes promoting a nationally consistent application of the relevant law and regulations. The following table provides a summary of the ECE reforms.

Table 53. Key changes under the National Quality Framework

<b>2012</b>	<b>NQF commences</b> <b>1:4 educator to child ratio for children aged from birth to less than two years</b>
<b>2013</b>	Every child to have access to 15 hours/week of preschool delivered by a qualified early childhood teacher in the year before school
<b>2014</b>	All long day care and preschool services to employ a qualified early childhood teacher 50% of educators to have, or to be working towards, a diploma level or higher qualification All other educators to have, or to be working towards a certificate III qualification (or equivalent)
<b>2016</b>	1:11 educator to child ratio for children aged 3 to 5 years 1:6 educator to child ratio for children aged 2 to 3 years
<b>2017</b>	1:15 educator to child ratio for primary school-aged children Mandated family day care coordinator to educator ratios – 1:15 for the first 12 months of a new provider and 1:25 thereafter
<b>2018</b>	Implementation of revised NQS reducing the number of standards from 18 to 15 and number of elements from 58 to 40 Services can only receive an Exceeding NQS rating in a Quality Area when all standards in that Quality Area are rated at exceeding Services can only apply for an Excellent rating if all Quality Areas are rated at exceeding Changes to the definition of Significant Improvement Required from 'unacceptable risk' to 'significant risk'
<b>2020</b>	All long day care and preschool services with 60 or more children to employ a second early childhood teacher, or another suitably qualified leader

Source: ACECQA



## Recent sector changes

The current TICCSS survey includes some new questions that reflect recent and imminent changes impacting on the education and care sector. These are listed below.

## Impact of the second early childhood teacher

Since 1 January 2020, providers of centre-based children's services and preschools/kindergartens have been required to have a second early childhood teacher, or a suitably qualified person, when 60 or more children are attending the service (excluding NSW). We asked respondents whether they were able to access any state or territory funding or support packages to assist them to employ the second teacher, and the impact this may have had on their service.

## COVID-19

COVID-19 has had a significant impact and will continue to impact the way we live and work for a long time. Respondents were asked to report the impact the Federal government's emergency response to COVID-19 had on their service.

## Impacts of other Federal Government funding and support packages

Respondents were asked to provide feedback on the impact of other Federal Government funding and support packages in the past 12 months including transition payments, the Community Child Care Fund, and special circumstances grant. 134 respondents provided comments about how this impacted their service.

There was a variety of responses about how the funding and support packages supported or hindered service viability. For some, the ineligibility for JobKeeper meant they had to use their savings to stay afloat. For others, the funding meant they were able to stay afloat. For yet others, the funding was unnecessary and meant they weren't able to maintain previous profits.

All feedback concerning families talked about the positive effect this had for them. Some families were able to access care for the first time. Others were able to keep their children home, yet retain their enrolments, when the level of COVID-19 in the community was high. Other families, struggling financially after job losses, had a break from fees and were able to use the money they saved to pay for care when the situation in the community was safe again.

Many respondents talked about the negative impact the policy had on educator and staff professionalism. Others talked about how JobKeeper enabled the service to retain staff, although others discussed the ineligibility for JobKeeper meant they lost casual staff and staff on Visas.

## **Impact for struggling families**

- “In this region we were just beginning to move out of a crippling drought which had impacted families both on and off the land. Two free days per week has allowed these families to continue preschool, and for some families increase their enrolment.”
- “It enabled us to support families by eliminating fees and stay open.”
- “We had children enrol in our service that had not attended before.”
- “The utilization remained stable, most families chose to maintain their enrolments at pre-COVID levels, as they continued to be employed in the same capacity. Some families chose to pause their child's attendance, which meant there was more casual days available for those who needed it. We learnt to be more flexible to support families to ensure continuity of engagement in the service.”
- “Families who had lost jobs were able to remain at service.”
- “This had a massive impact. As a lot of our families are already vulnerable, it meant that they could increase their care during this time, and it also gave them the opportunity to save some money during a difficult time. Free child care enabled some families to put away some money so that they could maintain their child care bookings after free child care ended, because they saw the positive benefits it gave their child.”**”

## **Impact on educators and other staff**

- “Families returned to the centre once care became free, but we did not lose enrolments prior to this. Due to paying above award wages and staffing above ratio, the money we received from the government only just covered our wages, meaning that we were unable to bring in new resources or address maintenance issues.”
- “There was a massive impact. We could only operate single staffed and this put huge pressure on staff dealing with vulnerable children, who had no funding support. It was mentally and physically very draining.”
- “For family day Care educators, payment went down because of the CCS cancellation and less payment given to services.”
- “It was an insane time as changes were communicated to the wider community before services had any information about it. Highly unprofessional, and made us all look incompetent within our positions.”
- “Lots of families attending, less community regard for our professionalism.”

## Impact on viability

*"As we are a shire managed service we struggled, because we weren't eligible for JobKeeper payments."*

*"More enrolments. More days enrolled. Had to hire more casual staff to meet needs. Our profession and the positive outcomes for children were undervalued. Children attended less consistently."*

*"Had to lay off staff due to lack of income. The service wasn't eligible for JobKeeper."*

*"Staff did not understand how some families were able to access care when others could not. Staff did not want to be at work but did not want to use leave entitlements to be at home."*

*"Paperwork nightmare, anxiety in staff due to loss of income and budgeting worries, casuals resigning."*

”

“

*"It saved our service from extinction."*

*"Majority of the families that left due to COVID 19 returned to care in our service."*

*"The continuation of CCS with JobKeeper meant that we survived."*

*"At first we didn't see how we could remain viable. The income received was much less than previously, but with the introduction of JobKeeper and the business cash flow boost, CCCF funding put us in a better position than before."*

*"Loss of financial security."*

**"Devastating. As an essential service we needed to stay open for essential workers and vulnerable children. As a single staff very small service we operate on our bare bones as it is. We will be in the red for at least 2 years."**

*"We were only receiving 50 per cent of our revenue with no access to JobKeeper which impacted the income of the services."*

*"We made a loss during this time. How can you expect services to be operational when only gaining half their income?! Was this truly thought through? If you are an essential worker going to work then you are earning money and can pay fees! If you are non-essential or staying at home then yes waiving the gap was helpful, as families were not paying for a service they were not using, and it meant families were able to secure their place for when they returned to work."*

*"Added additional Enrolment for families which increased our staffing need. And created a shortfall in our budget by not receiving gap fee payment."*

*"This cost a lot but would have been worse if we didn't get subsidised. We had less children so it didn't improve our attendance therefore having less educators."*

**"Significant. We ran at a significant loss as more than half of our staff members were not eligible for JobKeeper funding, and the subsidy we received from the government did not come near being able to cover operating costs."**

”

# Appendix B: Demographics of respondents to 2021 survey

## Respondent demographics

This section of the report documents respondents' service demographics. Where relevant, data from previous surveys have been included.

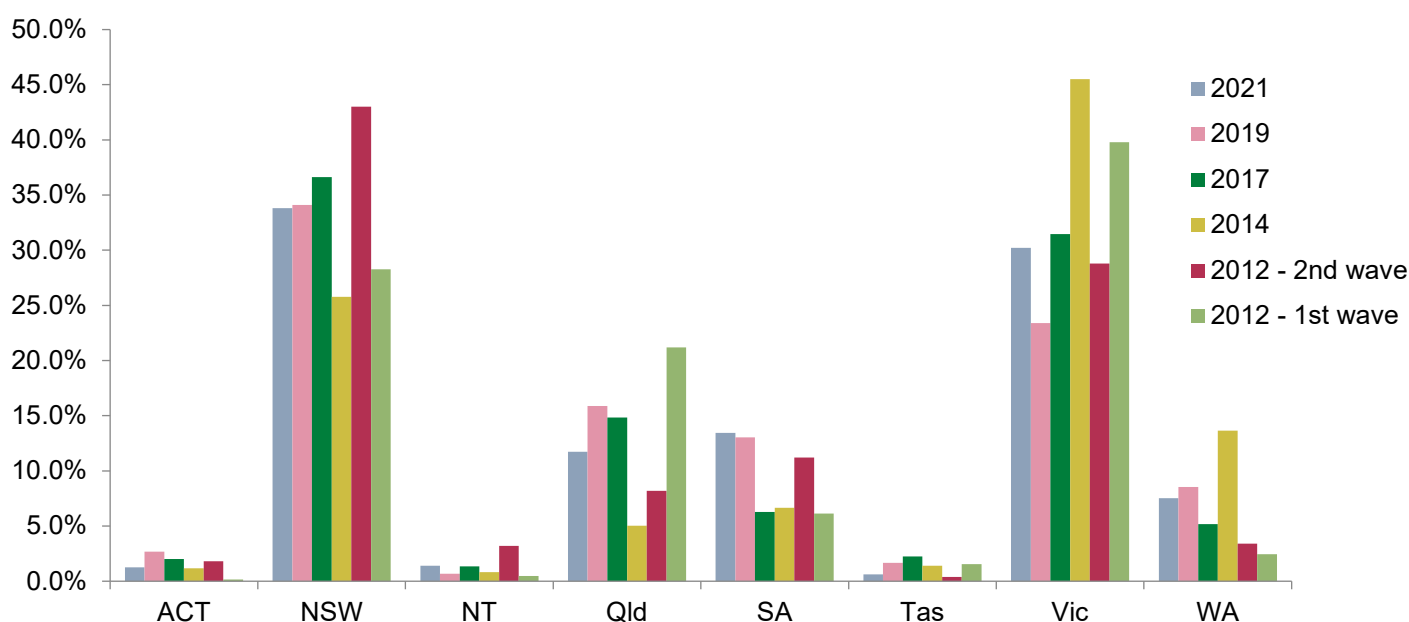
652 people responded to the 2021 survey. The survey was made available through Survey Monkey and was promoted through a variety of online communications.

Unless otherwise stated all data in tables/charts is from TICCSS.

## Location of respondents

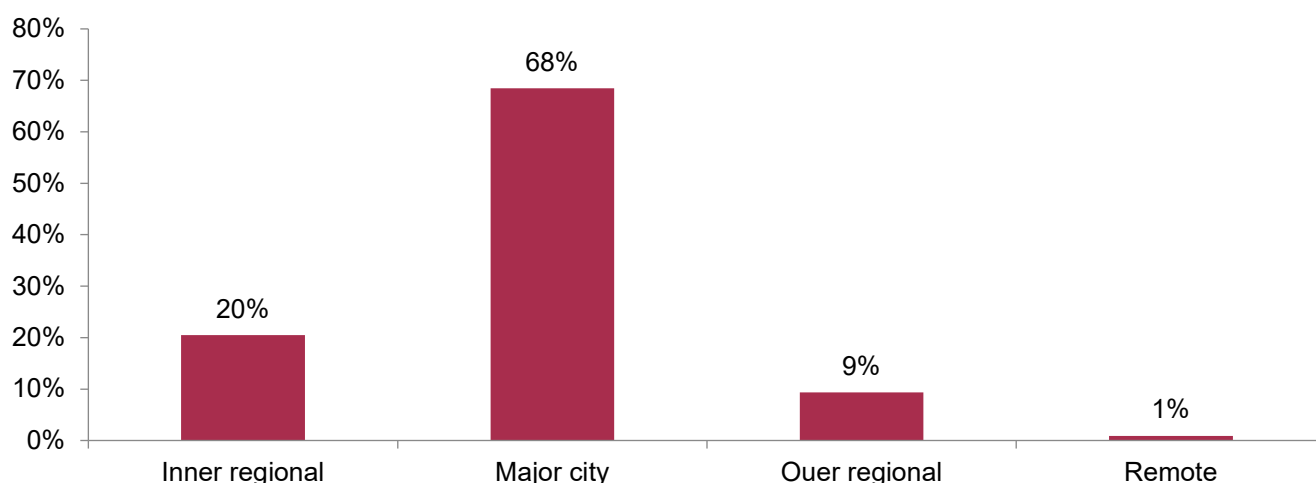
In 2021, TICCSS survey respondents came from every state and territory in Australia with the largest group of respondents from NSW (216, 34%) and Victoria (193, 30%). The following table shows which jurisdiction respondents came from for the current and previous waves of TICCSS. Survey respondents in each survey wave may not have participated in the previous waves. This research is not intended to track changes in individual services but provides an indicative snapshot at the time of the survey.

Table 54. State/ Territory of respondents



Survey respondents were located in the city, regional, rural and remote areas throughout Australia. 88% of respondents to this question were located in major cities or inner regional areas, followed by outer regional, remote and very remote locations. The following table shows the geographic location of respondents.

Table 55. Geographic location of respondents



## The respondents' service governance model

TICCSS continues to achieve its primary focus on documenting the experiences of not-for-profit services.

Just over half (325, 51%) of the respondents' services were managed by a standalone committee, association or cooperative and a third (217, 34%) by a not-for-profit organisation; the same proportion as the 2019 survey. As for previous waves of the TICCSS research, a small number of private for-profit services responded. The following table shows the children's service governance model of respondents across all waves:

Table 56. Education and care governance model

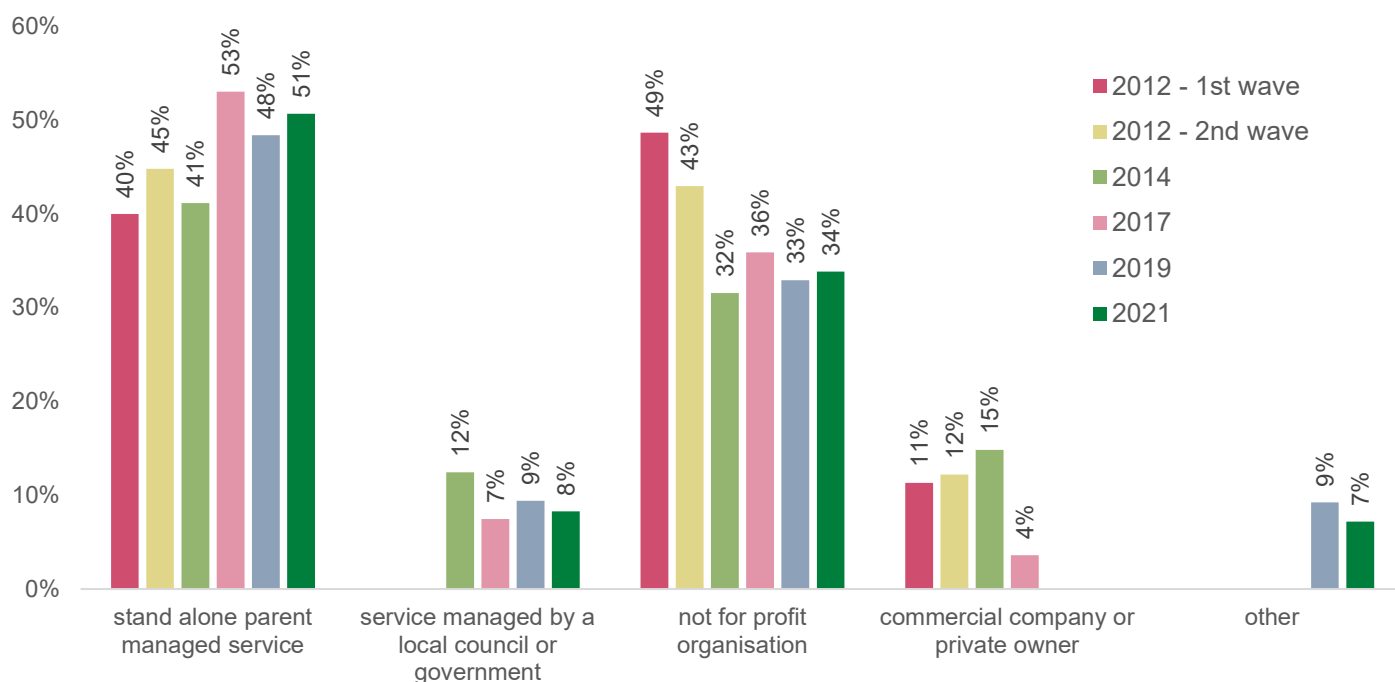


Table notes:

The 2012 waves did not separate out local government and other not-for-profit organisations. In 2019 the commercial company or private owner options was deleted and 'other' was added.



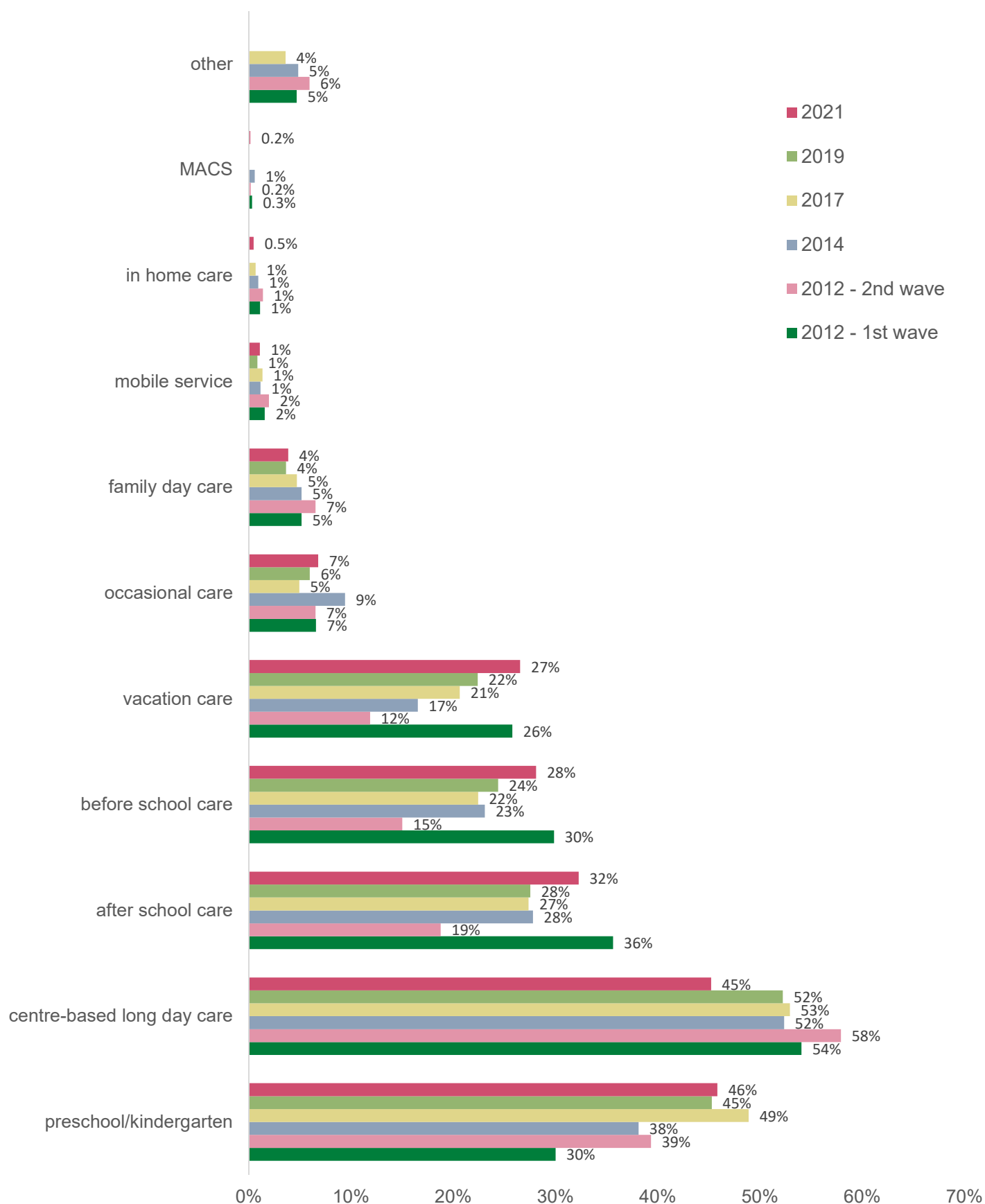
Of the 46 (7%) respondents in 2021, who described themselves as 'other', these included the integrated children's services, services run by charities, and neighbourhood centres.

## Service type

Respondents represented the full range of education and care services in Australia, including all those covered by the *National Law and Regulation*, and out of scope services such as occasional care and mobile services. In each survey wave centre-based long day care has comprised the largest group of service types provided by respondents. In 2021, just under half of services provided preschool/kindergarten (297, 46%), (293, 45%) of the respondents provided centre-based day care, and one third provided after school care (209, 32%), before school care (182, 28%) and vacation care (172, 27%). The following table shows the range of education and care types provided by respondents:



Table 57. Service types provided

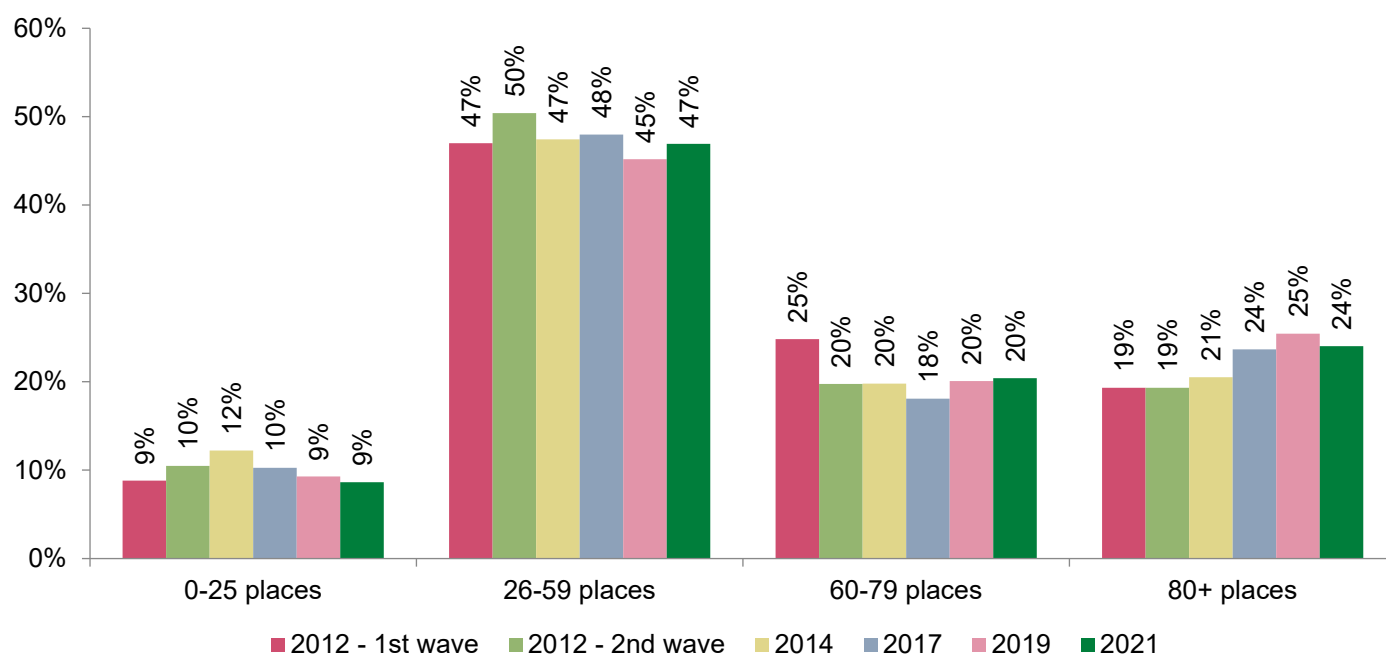


## Children

### Number of approved child places

Just under half (283, 47%) of respondents were approved to provide 26 to 59 child places, followed by 80+ child places (145, 24%). This has been a consistent trend across all survey waves. The following table shows the proportion of approved child places by service size:

Table 58. Proportion of approved child places offered



Around half of those respondents that provided preschool/kindergarten (141, 51%), or centre based day care (133, 48%) had services ranging in size from 26 to 59 places. More OSHC services were approved for 80+ places. These 80+ child services were:

- Before school care – 47% (80)
- After school care – 42% (83)
- Vacation care – 46% (73)

### Number of child places offered per day

Respondents provided services to a significant number of children aged from birth to 12 years.

The 652 respondents provided 42,647 places for children aged from birth to 12 years of age, with 11% (4,704) of total places provided for children aged from birth to less than 2 years, 13% (5,498) for children aged two to less than three years, 42% (18,034) for children aged

from three to five years and 34% (14,411) for school age children. The following table shows the proportion of places offered each day:

Table 59. Number of child places offered per day

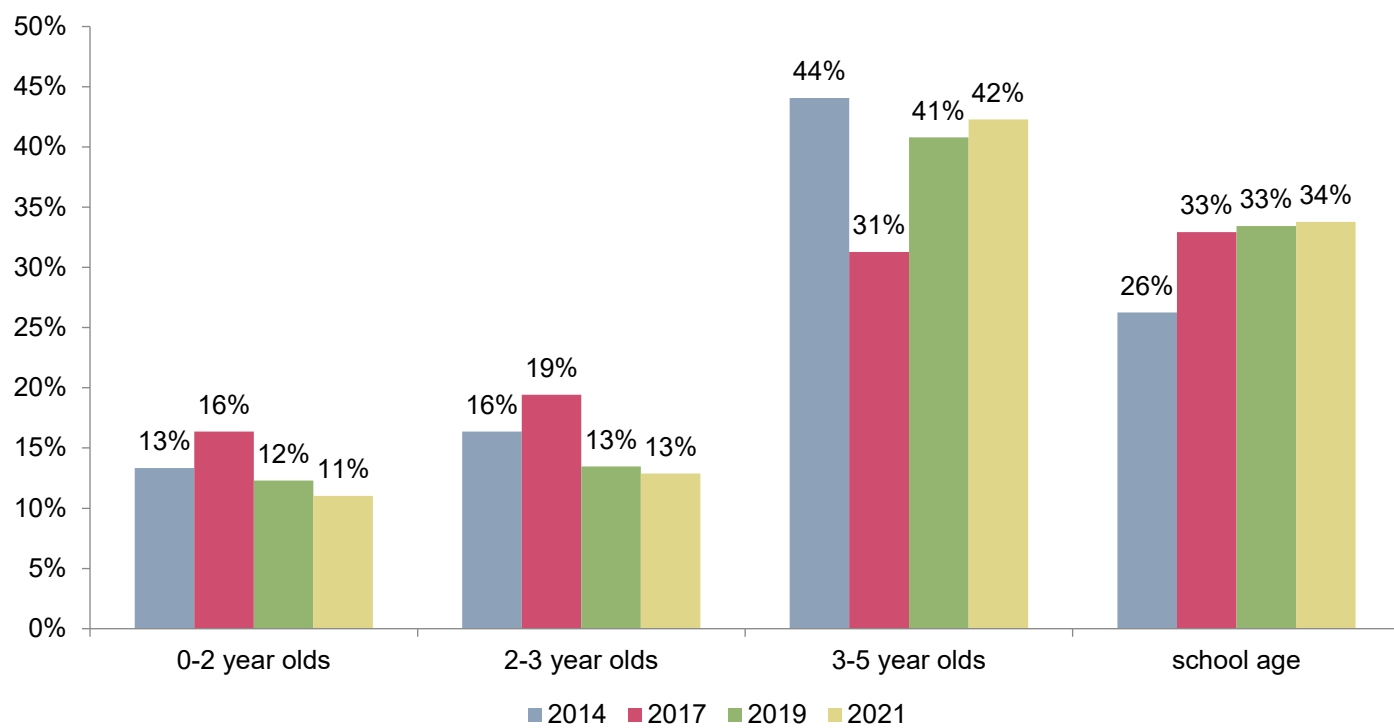


Table note:

This question was not asked in 2012 1st and 2nd waves

Of the 28,236 places for children aged from birth to five years not at school, 17% were for children aged from birth to two years, 19% for children aged two to three years, and 64% for children aged three to five years.

# Appendix C: List of tables/charts

Table 1. TICCSS survey waves .....	8
Table 2. Overall NQS ratings, TICCSS respondents and all services as reported by ACECQA..	14
Table 3. TICCSS respondent services, previous and current NQS ratings.....	15
Table 4. Quality Areas respondents had implemented positive changes in ratios.....	18
Table 5. The following table shows the current minimum adult to child ratios for each age group.....	19
Table 6. Educator to child ratios by age group, children aged from birth to 5 years, 2021 .....	19
Table 7. Educator to child ratio, primary school-aged children, 2021.....	20
Table 8. Current qualifications of teachers and educators 2012 to 2021.....	22
Table 9. Educators enrolled in further study by qualification , 2012 – 2021 .....	24
Table 10. Proportion of approved services by provider management type and SEIFA quintile .....	28
Table 11. Impressions of how many children were experiencing vulnerability by SEIFA quintile, 2021 .....	29
Table 12. Proportion of children by age on waiting lists.....	33
Table 13. Changes in ages of children on waiting lists .....	33
Table 14. Peak waiting times by age group, 2012 to 2021.....	34
Table 15. Average time on waiting list, children from birth to school age, 2021 .....	35
Table 16. Fee increase over the last 12 months, by SEIFA quintiles 2021 .....	37
Table 17. Main reason/s for fee increase, 2012 to 2021 .....	38
Table 18. Impact of fee increases on families .....	39
Table 19. Respondents experienced the following situations due to the changes and events in Australia in 2020 .....	43
Table 20. How services will be in 12 months' time? .....	44
Table 21. Service utilisation before and during the pandemic, and current.....	45
Table 22. Services with less than 60% utilisation, August 2020.....	45
Table 23. Increases in issues that children and families are facing, 2021 .....	47
Table 24. Comparison between tenure of contact staff, National ECEC Workforce Census, 2016 compared with TICCSS, 2021 .....	50
Table 25. Educator length of tenure, 2014, 2017 and 2019 .....	51
Table 26. Pay conditions above award, 2014, 2017, 2019 and 2021.....	52
Table 27. Tenure stability of staff, by pay and conditions, 2021 .....	53
Table 28. Professional development options provided, 2017, 2019 and 2021 .....	55
Table 29. Expenditure spent on professional development, 2021.....	56
Table 30. Annual expenditure on staff, proportion of revenue, 2021 .....	57
Table 31. Proportion of revenue on staff expenditure, by tenure-stability, 2021 .....	57
Table 32. Qualification of educational leader, 2019, 2021.....	61
Table 33. Years of education and care experience of educational leader, 2019, 2021 .....	62
Table 34. Service time allocation to educational leadership role, 2021.....	62
Table 35. Frequency allocated time to the educational leader is used, 2019, 2021.....	63
Table 36. Table 1. Cohorts of services with educational leader qualification or experience characteristics, by tenure stability rating, 2021 .....	64

Table 37. Cohorts of services with educational leader characteristics, by most recent NQS rating and assessment outcome, 2021.....	65
Table 38. Utilisation-viability measure, 2012 to 2021 .....	69
Table 39. Average weekly utilisation by service size, 2021 .....	69
Table 40. Average weekly utilisation, 2012 to 2021 .....	70
Table 41. Average weekly utilisation by remoteness of respondent, 2021 .....	70
Table 42. NSC, child carers' vacancies October 2019 to March 2021 (Proportion of September 2019 vacancies) .....	71
Table 43. Service employment vacancies, 2012 to 2021 .....	72
Table 44. Recent recruitment by qualifications.....	73
Table 45. Standard of the field of applicants to most recently recruited position, 2012 to 2021 .....	73
Table 46. Standard of the successful educator's suitability for the role .....	74
Table 47. Standard of the successful educators' qualifications for the role.....	74
Table 48. Difficulty recruiting at different qualification levels – 2021 .....	75
Table 49. Factors that impact on ability to recruit .....	76
Table 50. Top three highlights experienced in the last 12 months, 2014, 2017, 2019 and 2021 .....	80
Table 51. Top three concerns experienced in the last 12 months, 2014, 2017, 2019 and 2021 .....	81
Table 52. Perceptions of the most recent assessment and ratings process The highest:.....	83
Table 53. Key changes under the National Quality Framework.....	90
Table 54. State/ Territory of respondents .....	95
Table 55. Geographic location of respondents .....	96
Table 56. Education and care governance model .....	96
Table 57. Service types provided .....	98
Table 58. Proportion of approved child places offered .....	99
Table 59. Number of child places offered per day .....	100