



# **ACCS Trends in Community Children's Services Survey**

**2014 Third Wave  
National Report**

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## Abbreviations

ACCS	Australian Community Children's Services
ACECQA	Australian Children's Education and Care Quality Authority
ASC	After School Care
BBF	Budget Based Funding
BSC	Before School Care
ECEC	Early Childhood Education and Care
ECT	Early Childhood Teachers
FDC	Family Day Care
LDC	Long Day Care
MACS	Multifunctional Aboriginal Children's Services
NFP	Not for Profit
NQF	National Quality Framework
NQS	National Quality Standard
RTO	Registered Training Organisation
OSHC	Outside School Hours Care
TAFE	College of Technical and Further Education
TICCSS	Trends in Community Children's Services Survey
VAC	Vacation Care

# Executive Summary

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Australian Community Children's Services is pleased to present evidence from the third wave of the Trends in Community Children's Services Survey (TICCSS) on the successful implementation of the National Quality Framework (NQF), including the implementation of improved educator child ratios, educator qualifications and improved service delivery.

In mid-2014, ACCS conducted the third wave of its key survey of community children's services, TICCSS, following previous surveys in May/June 2012 and October/November 2012. The timing of this third survey is interesting, given that it marks the mid-point in the five year process of improving the qualifications of educators and the ratio of educators to children. Most of the major changes have been implemented – 1:4 ratio of educators to children under 2 years of age, 15 hours per week of early childhood education in the year before school, all long day care services and preschools employing a qualified Early Childhood Teacher, 50% of educators holding a diploma or higher qualification and all others holding a Certificate III.

Still to come is the 1:11 ratio of educators to 3 to 5 year olds in 2016 and the requirement for an additional Early Childhood Teacher for larger services in 2020.

2014 is also two years into the new early childhood assessment and rating system. The third wave survey documents at a key stage in the national reform process how the sector has incorporated major changes in minimum standards, the impact on fees, utilisation and staffing, and the experience of the new quality assessment and rating system.

The sector continues to participate well in the survey - nearly 900 services participated in 2014, representing all states and territories and long day care, outside school hours care, family day care, preschool/kindergarten, in home care, multi-functional Aboriginal children's services, occasional care and mobile services. Trends in Community Children's Services Survey continues to provide a snapshot of how the not-for-profit sector in particular is responding to the National Quality Framework.

Key findings of the third wave of Trends in Community Children's Services Survey include:

- No decline in utilisation or waiting times
- Services are meeting the higher ratio of educators to children and many are exceeding the ratio for children under 2
- The workforce continues to be stable and there are fewer staff vacancies
- There is a stronger culture of study to improve qualifications, a reduction in the proportion of educators with no early childhood qualifications and an increase in the proportion with Diploma qualifications
- Services are finding it easier to recruit for all qualification levels
- Fee increases are within normal operating limits
- The number of waivers exempting services from meeting quality standards has not increased
- More services are reporting a reduced workload from National Quality Framework

However there has been some deterioration since the 2012 waves of Trends in Community Children's Services Survey:

- The number of vulnerable children is increasing as is the range of vulnerabilities



- Inadequate wages for educators has become more problematic for services
- More services are experiencing negative responses from families to fee increases, despite the increases being modest

Trends in Community Children’s Services Survey has explored some new areas in this third wave and discovered some encouraging information:

- Most services are paying above Award wages and conditions
- The process of developing Quality Improvement Plans is bringing about improvement in services
- Services are making improvements in all areas, especially in educational programming, the physical environment and relationships with families
- The new assessment and rating system is largely seen by the sector as clear and accurate
- Most respondents who have undergone assessment have been rated as meeting or exceeding National Quality Standard

However the sector reports dissatisfaction with the process of review and feedback on the draft assessment report. Poor quality qualifications issued by commercial Registered Training Organisations are the largest problem with recruitment of educators.

### Utilisation and waiting lists

Utilisation of places in early childhood education and care services remains strong. While there has been an increase in the proportion of services operating at less than 90%, the majority of services operating at over 90% utilisation. Average waiting times for a place remain unchanged.

*There is a very strong demand for Community Based Child Care*

*Victorian Respondent*

### Ratios

All of the respondents are operating at the minimum standard of 1:4 educators to children under 2, with one quarter operating at 1:3 or better.

The vast majority are already meeting the 1:11 ratio for children aged 3 to 5 years and half are operating at 1:10.

Half of the respondents who provide school aged care are operating at better than the national standard of 1:15.

### Workforce

In 2014 the early childhood education and care workforce was demonstrating a well-established culture of study and upgrading of qualifications, with one-quarter of educators engaged in study. Overall there was a reduction in the proportion of educators without relevant qualifications and an increase in the proportion with a Diploma. 97% had achieved the minimum requirement of a Certificate III in children’s services and one third have a Diploma, with nearly half studying for a Diploma.

It is concerning, however that six months after Certificate III became the mandatory minimum for all educators, there were still a few hundred educators who were unqualified and not engaged in study.

Staff retention had improved, with a reduction in vacancies at the time of the survey. Most of the vacancies were for Certificate III and Diploma level positions. Nearly half of respondent services had educators with six years or more service, making up 20% of the workforce.

Compared with 2012 data, staff retention had improved in 2014, with a reduction in vacancies at the time of the survey. Most of the vacancies were for Certificate III and Diploma level positions. Nearly half of respondent services had educators of 6 years or more service, making up one-fifth of the workforce.

The main cause of difficulties with recruitment continues to be the poor quality of qualifications and skills of applicants. For the first time, Trends in Community Children's Services Survey explored the sector's experience of commercial Registered Training Organisations and found the qualifications they issue to be the largest cause of recruitment difficulties.

Pay and conditions is a new area of study for Trends in Community Children's Services Survey. The 2014 survey reveals that three-quarters of not-for-profit community-owned services (and two-thirds of commercial services) offer above-award pay and conditions.

## **Fees**

Fees in long day care have increased at a rate higher than CPI, with an average 10% increase in two years, mostly attributed to normal increases in operating costs. The additional costs of meeting higher standards in the National Quality Framework were cited by a minority of services (20%).

Fees for outside school hours care have increased at a faster rate – 15-25% in two years across before, after school and vacation care. This may be due to the variations in sample size across the three waves of TICCS surveys.

The national median long day care fee is \$85.50 per day, before school care \$13 per session, after school care \$17.50 per session and vacation care \$50 per day.

While the vast majority of services reported that families understood the need for fee increases, an increasing proportion reported negative reactions from families – frustration, financial stress and families reducing hours of care or leaving the service.

Given that the fee increases were mostly attributed to normal increases in operating costs, it seems likely that families are expressing responses to general costs of living pressures rather than the impact of the NQF, specifically.

## National Quality Framework

Trends in Community Children’s Services Survey reveals that in the second year of the quality reforms, the sector is successfully meeting the requirements, and more services are reporting a reduction in the associated workload; however over one-third (40%) report a significant increase in the workload.

*Assessment and rating outcome justified our hard work with a good result (Exceeding)*

*NSW Respondent*

An increasing proportion of services report that the workload of the National Quality Framework is declining; but still over one-third report a significant workload. Increased paperwork and insufficient time to complete tasks continue to present the biggest challenges for services. Inadequate wages has risen to the third biggest issue facing respondent services.

Most encouragingly, staff reluctance to embrace change has dropped from the second biggest challenge in 2012 to seventh in 2014. This suggests that the workforce is coming to terms with the benefits of the extra work required to change long established practices.

The sector reported many highlights of their first experiences of the new National Quality Framework. The top highlight is the process of developing the Quality Improvement Plan resulting in tangible improvements in services.

This highlight is closely followed by educators being more interested and engaged in programming and planning, regularly engaged in reflective practices and most importantly improved learning outcomes for children as a result of the National Quality Framework reforms.

Clearly there is still a way to go before the majority of services report these highlights. The National Quality Framework reforms still have several years to roll out to full implementation, so it is heartening to see clear positive change occurring as a result of the reforms to date.

The majority of services are seeing improvement in educational programming, the physical environment and partnerships with families. Nearly half reported positive change in all quality areas.

There is no change in the proportion of services with waivers, exempting them from meeting national standards.

Most of the services which had undergone assessment and rating under the new quality system were positive about the clarity of the process and the accuracy of the rating. Most negative responses were about timely reporting of outcomes, the process of review and providing feedback on the draft report, the usefulness of the report and the accuracy of the final rating.

Three-quarters of the services who had been rated were rated as meeting or exceeding National Quality Standard. None required significant improvement.

### Child vulnerability

While there was no change in the proportion of services with children they identify as vulnerable – the vast majority – more services reported an increase in the number of vulnerable children and in the type of vulnerabilities.

# Introduction

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The third wave of the Australian Community Children's Services (ACCS) Trends in Community Children's Services Survey (TICCS) provides a picture of the experiences of the sector, and the not for profit (NFP) community children's services sector in particular, one-third of the way through the eight-year national plan that commenced on 1 January 2012 to significantly improve the education and care provided to children and families.

The results show that the community sector is embracing the challenges and the opportunities provided by the National Quality Framework (NQF) to support learning and development in the critical early years with skilled and qualified educators, consistent minimum standards across the nation and a robust uniform quality assurance system underpinned by evidence-based frameworks to ensure child centred, reflective practice.

## About the National Quality Framework

On 7 December 2009 the Prime Minister and each State and Territory Premier/Chief Minister signed a *National Partnership Agreement on the Quality Agenda for Early Childhood Education and Care*. This Partnership outlined a national agreement to "deliver an integrated and unified national system for early childhood education and care and Outside School Hours Care (OSHC), which is jointly governed and which drives continuous improvement in the quality of services"<sup>1</sup>.

This integrated and unified national system commenced on 1 January 2012 with a regulatory framework that 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* that sets the national benchmark for the quality of education and care children receive while attending a children's service, including a preschool and
- two new national curriculum frameworks that form critical and important elements of education and care service delivery, and key measurements in the National Quality Standard (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 age children attending out of schools hours (OOSH) services. Some states/territories retained pre-existing curriculum frameworks that could also be used.

These positive changes support learning and development in the critical early years with skilled and qualified educators, consistent minimum standards across the nation and a robust uniform quality assurance system underpinned by evidence based curriculum frameworks to ensure child centred, reflective practice.

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<sup>1</sup> National Partnership Agreement on the National Quality Agenda for Early Childhood Education and Care, Part 2, 16 (a), p. 7

In addition to the reforms under the NQF the early childhood education and care (ECEC) sector have had several high profile developments including:

- The commencement on 1 January 2013 of universal access to 15 hours a week of preschool delivered by a qualified early childhood teacher in the year before school
- The launch of an equal pay case through Fair Work Australia by United Voice
- Injection of \$300 million from the Australian Government in their Early Years Quality Fund (EYQF) to support increased wages for educators in LDC. This fund was later scrapped and the funding used to support professional development for LDC educators through the new Long Day Care Professional Development Fund (LDCPDP)
- Productivity Commission Reviews into the early childhood development workforce and future options for childcare and early learning

**Table 1: Timeline for Early Childhood Education and Care Reforms**

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

## Why do a survey

ACCS recognises that research is vital to track the implementation of these reforms, ensuring the experiences of services are heard, providing identification of the positive outcomes of these changes and real challenges that require policy attention. ACCS is acutely aware of the limited sources for information on the experiences of early and middle childhood services in Australia, and, in particular, of NFP services.

Since the last *Census of Child Care Services*<sup>2</sup> in May 2006, the Australian Government has released sporadic reports on child care statistics, including the *Early Childhood And Child*

<sup>2</sup>

[http://docs.education.gov.au/system/files/doc/other/2006\\_australian\\_government\\_census\\_of\\_child\\_care\\_services.pdf](http://docs.education.gov.au/system/files/doc/other/2006_australian_government_census_of_child_care_services.pdf) downloaded 16.10.15

*Care in Summary September Quarter 2014*<sup>3</sup>. These short reports and the census do not distinguish between the NFP children's services and commercial, for-profit, services.

The Australian Children's Education and Care Quality Authority (ACECQA) is publishing the results of its assessments of services under the NQF but also does not distinguish for-profit, commercial services from NFP services. ACCS knows that the experiences of the NFP sector are often very different to their commercial counterparts and believes these NFP voices should be heard. Given the formative change happening in our sector, this data gap is resulting in a lack of understanding of how the NFP sector is responding to the reforms. Research driven by the NFP sector on the NFP sector can provide different data on successes and challenges and shine a light on the experiences of these services around Australia.

## **TICCSS: addressing a gap in knowledge**

ACCS advocates for the right of Australia's children to access quality not-for-profit, community-owned children's services. ACCS welcomes and actively supports the national quality reforms.

As the peak body for NFP, community-owned children's services, ACCS recognised the gaps in knowledge and with the initial TICCSS in May 2012, commenced an ambitious research agenda to track the experiences of community children's services in Australia throughout the years of implementation and beyond. With three surveys of the sector to date, TICCSS has monitored the experiences of children's services across Australia in one of its most transformative periods. Our research focuses on educator:child ratios, utilisation, waiting lists, fees (including increases), experiences in implementing the NQF, existing and emerging vulnerabilities in communities and experiences with regard to recruiting and retaining staff.

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

Conducted in May/June 2012, the first wave of TICCSS attracted responses from 640 services around Australia. Recognising the significance of the first year of the reforms, the second wave was conducted later in the same year, in October/November 2012 and captured the experiences of over 500 services including the development of Quality Improvement Plans, appointment of educational leaders and the commencement of assessment processes. More than 800 services participated in the third survey conducted in May/June 2014. In addition, the largest NFP provider in Australia, GoodStart provided data from its 641 services on the number of places provided, fees and NQS ratings.

Some new areas of inquiry were added for the third wave of TICCSS:

- rates of pay and conditions of educators, in order to track the impact of recent industrial campaigns
- exploring the impact of poor quality qualifications from commercial registered training organisations
- highlights of the last year as well as issues and challenges

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<sup>3</sup> [http://www.mychild.gov.au/sites/default/files/documents/08-2015/in\\_summary\\_sep\\_quarter\\_2014\\_final.pdf](http://www.mychild.gov.au/sites/default/files/documents/08-2015/in_summary_sep_quarter_2014_final.pdf) downloaded 16.10.15

- services' experiences of the NQF rating and assessment processes
- which Quality Areas the services are seeing positive change in.

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

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

The Trends in Community Children's Services Survey (TICCSS) is designed to be explorative. The findings, and this report, are intended to be indicative of what is happening in the sector and not representative. ACCS believes it provides vital information to track changes in the sector as government policy brings about the transformation to ensure consistently high quality education and care for Australia's young children.

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

# Demographics

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This section of the report shows the background demographics of respondents. Where relevant, data from the previous surveys have been included.

## Response rate

The ACCS TICCSS 2014 was made available on-line through Survey Monkey and promoted nationally within the NFP community children’s services sector through a variety of on-line and hard copy communications.

A total of 871 individual survey responses were received from services employing nearly 11,000 educators and providing education and care to over 53,000 children per day. While the survey’s primary target group was all NFP children’s services, any early childhood education and care service approved for Child Care Benefit or Budget Based Funding (BBF) could participate.

An additional 641 services participated through their head organisation, GoodStart; this data is incorporated at some points and is clearly labelled where it has been used.

## Geographic spread of respondents

Survey responses were received from all states and territories, with the largest proportion of responses from Victoria and NSW. These two states have the greater proportion of formal children’s services. Queensland is under-represented in the TICCSS responses compared with the sector as a whole.

It should be noted respondents in each wave may not have participated in the previous wave. This research is not intended to track changes in individual services but provides an indicative snapshot at the time of the survey.

**Table 2: State and Territory breakdown of respondents**

	Mid 2012	Late 2012	Mid 2014
Australian Capital Territory	0.2%	2%	1%
New South Wales	28%	43%	26%
Northern Territory	0.5%	3%	1%
Queensland	21%	8%	5%
South Australia	6%	11%	7%
Tasmania	2%	0.4%	1%
Victoria	40%	29%	45%
Western Australia	2%	3%	14%



## Governance Model

While TICCSS primary target is NFP services, some responses indicated they were from commercial, for-profit services. More commercial services participated in 2014, but represented a smaller proportion of responses due to the inclusion of the large number of GoodStart services.

GoodStart's participation resulted in a significant shift in the spread of governance models from that of previous surveys, with an increase in representation of services operated by NFP organisations and local councils.

For the first time, this wave of the TICCSS survey distinguished between services operated by not for profit organisations (61%) and those operated by local government (7%).

**Table 3: Responses by Governance Model over time**

	2012		2014	
	Number	%	Number	%
A stand alone parent managed service	205	41	344	23
A service managed by a local council or government	220	44 <sup>4</sup>	104	7
A not for profit organisation			905	61
A commercial company or private owner	75	15	124	8
<b>Total</b>	<b>500</b>	<b>100</b>	<b>1477</b>	<b>100%</b>

## Size of Service

Similar to the earlier waves of TICCSS, the third wave attracted responses from services of all sizes. Reflective of the NFP sector, most respondents (59%) were small services, providing less than 60 places. This is very similar to the range of services participating in previous waves of TICCSS.

With the inclusion of GoodStart the distribution shifts towards larger services.

**Table 4: Size of Services**

		Including GoodStart
0-25 places	12%	7%
26-59 places	47%	35%
60-79 places	20%	32%
80+ places	21%	25%

<sup>4</sup> Previous TICCSS surveys have not distinguished between council/government services and those delivered by NFP organisations

## Number of Child Places

Survey respondents provided more than 53,000 places per day to children aged from birth to primary school age, with almost half (44%, 23,439) being for children between 3 and 5 years of age. The following table shows the age break up of these child places.

**Table 5: Number of Child Places by Age**

	Number	Percent
0-2 year olds	7093	13%
2-3 year olds	8703	16%
3-5 year olds	23439	44%
school age	13968	26%
Total child places	53203	100%

## Service Types

2014 survey respondents provided a wide range of service types, with many respondents providing two or more service types. Most 2014 respondents provided long day care, followed by preschool/kindergarten.

More than one third (40%, 185) of long day care centres also provided preschool/kindergarten services as part of their business operations. Around 10% of long day care centres also provided before school care (10%, 46), after school care, vacation care and occasional care.

The following table shows the proportion of service types provided from the current and past two TICCS surveys.

**Table 6: TICCSS Responses by Services Types over Time<sup>5</sup>**  
**% of responses**

	Mid 2012	Late 2012	Mid 2014
Long Day Care (LDC)	53	59	52
Before School Care (BSC)	29	15	23
After School Care (ASC)	35	19	28
Vacation Care (VAC)	25	12	16
Occasional Care (OCC)	6	7	9
Kindergarten/Preschool	29	40	38
Family Day Care (FDC)	5	7	5
In Home Care	1	1.4	1
Multi-functional Aboriginal Children's Services (MACS)	0.3	0.2	1
Mobile Service	1	2	1

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

# Waiting Lists and Utilisation

Governments of all shades are committed to ensuring child care is available to families who need it.

The introduction of the NQF was accompanied by concerns that increased operating costs would outstrip the capacity of families to pay the increased fees, thereby decreasing utilisation.

However, TICCSS data on service utilisation and waiting lists across the age groups shows that these concerns have not been realised.

## Utilisation

Utilisation rates remain strong. However, while the third wave TICCSS survey still shows a majority of services are experiencing very high (over 90%) utilisation of registered places, this has reduced since 2012 from two-thirds to half in LDC and from one-third to one-quarter in OSHC.

**Table 7: Average Weekly Utilisation**

% of respondents

Utilisation Rate	All Services		LDC		OSHC	
	Oct/Nov 2012	2014	Oct/Nov 2012	2014	Oct/Nov 2012	2014
91-100%	63%	51%	68%	55%	32%	23%
81-90%	18%	19%	17%	20%	26%	21%
71-80%	8%	14%	7%	12%	16%	26%
61-70%	7%	9%	6%	8%	13%	17%
Less than 60%	4%	8%	3%	6%	14%	13%

## Waiting Lists

In planning for education and care options for children, many families will experience a wait in finding a place in certain areas and preferred services. Two-thirds (66%, 568) of all services had a waiting list in 2014. Of those services that had waiting lists 44% (17,529) of children waiting were less than 2 years of age and 29% (11,214) were aged 2 to less than 3 years.

**Table 8: Number of Children on Waiting Lists by Age**

	Number	Percent
0-2 year olds	17529	43
2-3 year olds	11214	28
3-5 year olds	10539	26
school age	903	2
school age - vacation care	226	0.6
<b>Total</b>	<b>40411</b>	<b>100%</b>

Respondents point out that waiting lists are often not a reliable indicator of need of the service because families will go on several services' waiting lists (and this is encouraged by some services) and when they receive a place they may not necessarily notify all services to take them off the waiting list.

There are issues with specific age groups, including some services having to give priority to four year olds with the result that 3 year olds miss out. There are issues with some school start policies in different States and there are re-occurring mentions of some families having to wait several years to get the required days of care.

Effectively managing waiting lists is a challenge faced by many providers. Calling parents on the waiting list to 'keep in touch' is not a high priority if the centre has existing high occupancy.  
*National Respondent*

Waiting times have not changed significantly over the three surveys. In 2014 children aged from birth to less than 2 years were waiting 1-2 years (31%) or 6 to 12 months (31%) for a place. Older children, aged 2 to 3 year and 3 to 5 years, were waiting 6 to 12 months.

**Table 9: Average wait for child by age group**

	<b>Less than 3 months</b>	<b>3-6 months</b>	<b>6-12 months</b>	<b>1-2 years</b>	<b>More than 2 years</b>
0-2 age group	12%	18%	31%	31%	8%
2-3 age group	14%	22%	32%	25%	6%
3-5 age group	26%	21%	31%	18%	4%
School age	55%	19%	14%	8%	5%
School age (Vacation care)	83%	4%	4%	4%	4%

# Educator and Child Ratios

One of the most controversial areas of the NQF has been the new national minimum standards for educator to child ratios. These standards reflect research evidence of good practice, and bring into line previously differing ratios from state to state, to provide consistency across the country in the numbers of educators required for children according to age groups.

Contrary to the reports that this area of the NQF is creating problems for services, TICCSS data shows services meet, or exceed, the ratios that have been introduced to date. The vast majority of services (80%) are already meeting the ratios due for implementation in 2016 and nearly half have chosen to operate well above the national standards, recognising the relationship between quality and high staff ratios.

## Birth to two year olds

All respondents that provided infant places were operating with at least a 1:4 ratio of educators to children, as required since 2012. There have been slight improvements in educator:infant ratios with a modest increase in the proportion of respondents operating at 1:3 or better over time.

**Table 10: Ratios for Educators to Children from birth to 2 years over time<sup>6</sup>**  
% of services

Ratios	Mid 2012	Late 2012	Mid 2014
Better than 1:3	6	6	6
1:3	20	16	22
1:4	74	78	72

## Three to five year olds

A national minimum standard of one educator for every 11 children aged 3-5 year olds will apply from 2016<sup>7</sup>. All waves of TICCSS showed that the majority of the sector is meeting the standard well ahead of time and many are exceeding it. Furthermore, around half are operating at better than 1:10.

**Table 11: Ratios for Educators to children aged 3-5 over time<sup>8</sup>**  
% of services

Ratios	Mid 2012	Late 2012	Mid 2014
Better than 1:10	47	53	48
1:10	20	24	26
1:11	5	6	6
1:12	12	8	4
1:13	1	1	2
1:14	0	0.0	1
1:15	14	9	13

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

<sup>7</sup> Some states/territories require a 1:10 ratio for children aged 3 to 5 years eg NSW

<sup>8</sup> Please note that due to rounding off, some percentages will not add to 100.

Of the 114 services that are yet to transition to the new minimum, nearly one-quarter indicated they were going to make the move before the 2016 deadline.

### School aged children

The NQF introduced a minimum of 1:15 educator:child ratios for school age children, however many states had better ratios already in place. Over half of respondents who provide school age care are operating at better than 1:15, with 37% operating at the much higher ratio of 1:10, or better.

**Table 12: Ratios of Educators to School Aged Children over Time**  
% of Services

	Mid 2012	Late 2012	Mid 2014
better than 1:10	18	27	20
1:10	12	15	17
1:11	2	4	3
1:12	11	10	7
1:13	2	4	2
1:14	0	1	1
1:15	53	36	46
more than 1:15	3	4	5

# Workforce

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The NQF is shifting the ECEC workforce from one that was largely unqualified to one in which all educators have at least a Certificate III and a prescribed percentage with a Diploma or Early Childhood Degree qualification.

## Educators' Qualifications

Respondents to the third wave of TICCS employed 10,954 educators. The analysis below shows that a culture of study and upgrading of qualifications has been established in the community children's services sector.

### Certificate and Diploma qualifications

In 2014, 50% of educators in every service are required to have or be working towards a Diploma. TICCS found that 38% of educators have a diploma while 42% are currently working towards this qualification. So it appears that the sector is well on the way to meeting and exceeding the requirement for half of all educators to have diploma level qualifications.

In 2014, the Certificate III qualification became the minimum requirement for educators. TICCSS shows a steady decrease in the proportion of the workforce with no qualifications, with 93% of the workforce having at least a Certificate III by mid-2014. There has also been an increase in the proportion of educators with a Diploma qualification.

**Table 13: Educators' qualifications over time**  
 % of educators in respondent services

	Mid 2012	Late 2012	Mid 2014
Have no qualifications	12	11	7
Have completed a Cert III	35	37	35
Have completed a Cert IV (OSHC)	3	2	3
Have completed a Diploma (including advanced)	34	35	38
Have completed a three year degree	6	6	6
Have completed a four year degree	8	8	8
Have a post graduate qualification	2	2	2

800 educators had not completed a qualification by mid 2014; 70% of these were working towards a Certificate III. It is of concern that more than six months after Certificate III became the mandatory entry level qualification for early childhood education and care services there were still 237 educators employed in the sector who were unqualified and not engaged in study.

See the section below on Waivers for more details.

**Table 14: Educators working towards qualifications over time**  
 % of educators in respondent services

	Mid 2012	Late 2012	Mid 2014
Total % engaged in studying	27	26	23
Working towards a Cert III	7	7	5
Working towards a Cert IV (OSHC)	0.4	0.4	0.4
Working towards a Diploma (including advanced)	11	12	9
Working towards a three year degree	2	2	2
Working towards a four year degree	6	4	5
Working towards post graduate qualification	0.1	1	1

### Early Childhood Teachers

Six months after the 2014 requirement for all LDC and preschool services to employ a degree qualified Early Childhood Teacher, nearly three-quarters of LDC services reported having at least one educator with a degree in early childhood education.

Furthermore two-thirds (63%) of services reported having at least one educator currently working towards a degree, up from 25% in 2012. This is indicative of educators embracing the professionalisation of their sector and taking up opportunities for higher qualifications.

### Educator retention

The educator workforce continues to be stable with 44% of services employing at least some educators with six or more years of tenure. And this is not just a few long serving educators - it comprises 21% (1,994) of educators in these services. At the other end of the spectrum, a similar proportion, (18%, 1,649) of the workforce has been employed for less than one year in their current service.

**Table 15: Period of Employment in Current Service**

	No. of educators	% of Educators
less than 1 year	1649	18
1-3 years	3042	33
3-6 years	2593	28
6-10 years	196	2
more than 10 years	1798	19

The 2013 *National ECEC Workforce Census*<sup>9</sup> reported that tenure varied with relevant ECEC qualification; those with formal ECEC qualifications tend to remain in children's services employment longer than those with no ECEC qualifications. Only 4% of those with a formal qualification had less than one year's tenure compared with 28% of staff with no ECEC qualification.

<sup>9</sup> [http://docs.education.gov.au/system/files/doc/other/nwc\\_national\\_report\\_final.pdf](http://docs.education.gov.au/system/files/doc/other/nwc_national_report_final.pdf) downloaded 16.10.15



## Recruitment Experiences

Recruitment is often difficult in a sector which has historically been poorly paid and with low status work. Increasing qualification requirements is expected to eventually lift the status and so attract new, more skilled applicants over time. During this transition phase, there are particular challenges in attracting people with the right aptitudes and values, who are willing to undergo formal training in order to work in a profession which is still often viewed as ‘just baby minding’.

In this context, it is pleasing to see that in 2014 the proportion of services with a vacancy for an educator position at the time of responding has declined to 22%, down from 27% in 2012.

The vast majority of respondent services had all positions filled with more than three-quarters of respondents (78%, 614) reporting no staff vacancies.

Of the nearly one-quarter (22%, 172) of services that did have vacancies, these vacancies were mainly for vocationally trained positions – Cert III and IV and Diploma.

**Table 16: Vacancies for Each Qualification**

	Services with Vacancies		Vacancies	
	number	percent	number	percent
Certificate III and IV	94	40	176	48
Diploma	95	41	145	39
Degree	37	16	41	11
Director/Coordinator	8	3	8	2
Total	234	100%	370	100%

### Most recent educator recruitment

*For which qualifications?*

Two-thirds (64%, 511) of service respondents had recruited for educators in the past 6 months. This is similar to previous TICCS surveys, with 73% in the first wave and 60% in the second.

Two-thirds (68%, 342) of most recent recruitment had been for vocationally trained positions, that is Certificate III or Diploma. The following table shows the qualifications of services’ most recent recruitments. Again, this distribution is similar to previous TICCS surveys.

**Table 17: Number of Staff Recruited by Level of Qualification**

	Number	Percent
Certificate III	179	35
Diploma	163	32
Degree	73	14
Director/Coordinator	20	4
other	71	14
Total	506	100%

### Standard of candidates

Nearly half (47%, 218) of all respondents who had recruited in the six months before the survey considered the field of applicants to be of low or very low standard, while 38% (178) considered the field of adequate standard and only 14% (66) considered the field of high or very high standard. However, from this poor quality field of applicants, services were able to recruit educators of satisfactory suitability and qualifications. Ultimately, half of successful applicants were considered to be of high or very high standard.

**Table 18: Rating of Standard of Candidates and Successful Applicants**  
Percentage of Respondents Who Recruited

	Very low	Low	Adequate	High	Very High
Field of applicants	16	31	38	12	2
Successful applicant's suitability for the role	2	7	37	37	17
Successful applicant's qualifications for the role	3	4	46	29	18

There has been little change over the three TICCS surveys in service respondents' perception regarding the standard of the field of applicants, suitability of and the qualifications of the successful applicant.

### Difficulty recruiting

Generally, the higher the qualification required for a vacant position, the more difficulty respondents had in recruitment. Just over one third (40%, 273) of respondents recruiting for Certificate III or IV positions found it moderately, or very, difficult. By contrast, three-quarters (76%, 429) of degree recruitments and four-fifths (81%, 304) of director/coordinator recruitments were noted as moderately, or very, difficult.

**Table 19: Degree of Difficulty in Recruitment by Qualification Level of Vacancy**

	very difficult	moderately difficult	sometimes difficult	occasionally difficult	never difficult
Certificate III and IV	18%	22%	26%	19%	16%
Diploma	35%	25%	21%	13%	6%
Degree	54%	22%	11%	8%	5%
Director/Coordinator	61%	20%	8%	7%	5%

### Difficulty recruiting over time

The three phases of TICCSS show that, over time, it has become easier to recruit for all levels of children's services qualifications. For all qualifications, between 2012 and 2014 there was a decrease in the number of respondents indicating it was very difficult to recruit.

**Table 20: Very Difficult Recruitment over Time by Level of Qualification**  
 % of services

Positions	Mid 2012	End 2012	Mid 2014
Certificate III	22	15	16
Diploma	45	36	32
Degree	50	50	42
Director/ Coordinator	43	42	33

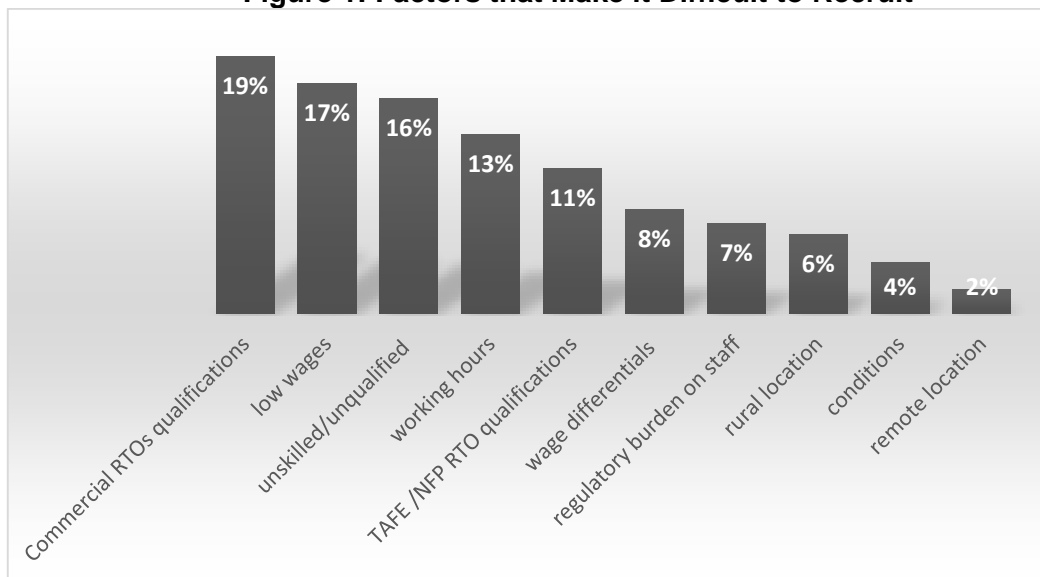
*What makes it difficult to recruit?*

Service respondents indicated that the main reasons they found filling staff positions difficult was applicants having completed qualifications with private RTOs and not being suitably skilled (19%, 367), low wages (17%, 328) and applicants not being qualified (16%, 307). Of least concern were conditions (4%, 73) and remote location (2%, 34). It is not surprising that remote location ranked as least difficult due to the corresponding low number of service respondents working in remote areas.

Concerns about the suitability of applicants' qualifications and experience were almost double for those trained in private organisations than for those trained in TAFE or other not-for-profit training organisations - 19% (367) compared with 10% (207).

It is interesting to note that burden on staff of meeting regulations was ranked very low by TICCSS respondents - fourth lowest difficulty out of the ten possible options (7%, 129).

**Figure 1: Factors that Make it Difficult to Recruit**



The past two TICCSS surveys did not ask respondents to consider quality or suitability of qualifications of applicants by type of training organisation so it is not possible to provide a direct comparison over the past three TICCSS surveys. The following table shows the responses from all three surveys.

**Table 21: Factors Affecting Recruitment Over Time**  
(% of services who recruited in prior 6 months)

	Mid 2012	Late 2012	Mid 2014
Applicants have completed qualifications with private RTO and are not suitably skilled	-	-	19%
Low wages	24%	24%	17%
Applicants are not suitably skilled [‘qualified’ in 1st & 2nd waves]	24%	26%	16%
Working hours	17%	13%	13%
Applicants have completed qualifications with TAFEs or other NFP RTO and are not suitably skilled	-	-	10%
Wage differentials between qualifications and/or different service types	11%	14%	8%
Burden on staff of meeting regulations	12%	10%	7%
Rural location	5%	6%	6%
Conditions	5%	5%	4%
Remote location	2%	2%	2%

While it is not possible to consider trends over time in the efficacy of qualifications and suitability of experience, some areas of difficulty do allow for direct comparison. Difficulty recruiting due to perceptions regarding hours of work have decreased over time (from 17% to 13%), along with wage differentials (from 11% to 8%) and most notably burden on staff of meeting regulations (from 12% to 7%).

This is further evidence that the sector is adapting successfully to the new requirements of the NQF and that perceptions of burdensome additional work away from the core work with the children appear to be declining.

### Rates of Pay and Conditions

*Even though we pay above award and offer above award conditions it is still not high enough in comparison to the expectations of the job.*

*WA Respondent*

This is a new section of the TICCS survey, added for the third wave in 2014 in order to track the impact of recent industrial campaigns to improve wages and conditions for early childhood educators.

The responses to TICCS suggest that the sector recognises that, in a competitive recruitment and retention market, above award pay and conditions are a key way to attract suitably qualified and experienced educators.

Just over two thirds (68%, 532) of respondents provided pay and conditions above the relevant modern awards.

Around three-quarters of respondents from stand-alone parent managed services (72%, 238) and those managed by local government (76%, 65) paid above award wages and also provided above-award conditions. Two-thirds (66%, 157) of all not-for-profit organisations and, pleasingly, more than half (57%, 59) of commercial or private children’s services paid above award.

Survey comments from respondents were in two broad groups – those that provided above award conditions and those that recognised this would be good to do but felt financially constrained due to tight operating budgets and capacity of families to pay higher fees resulting from potential wage increases.

*How can we attract educators to OSHC when we can only offer casual positions of as little as 20 hours per week without any job security? Then consider the fact that you can earn the same wage working as a checkout operator and have no responsibility for a child's life.*

*NT Respondent*

*Would love to pay more but do not want to make families pay any more for the education & care.*

*WA Respondent*

Many services provided further clarification to who specifically receives the above-award wage or not (eg Coordinator is above award but Cert III is not). Some services expressed they could not afford to increase educators' wages as they would have to pass it on to families. There were also some expressions of frustration at the amount of work that is required, the lack of recognition by government and the wider community and the lack of appropriate remuneration for the work performed.

# Fees

This section of the report shows average daily fees charged by respondents, fee increases and why, and the impact on families of fee increases.

## Current Fees

As is the usual practice, over time more services are charging higher daily fees; in 2012 just over one third of respondents had fees from \$70-\$79, two years later in 2014 around the same proportion now charged fees from \$80-\$89.

**Table 22: Average (Median) Daily LDC Fees over Time**

Area	Late 2012	Mid 2014
National	\$77.59	\$85.50 <sup>10</sup>
South Australia	\$75.86	\$82.32
New South Wales	\$73.93	\$84.53
Victoria	\$82.87	\$91.24

The median fee for preschools in 2014 was \$48 per day. It should be noted that this includes a wide range of lengths of sessions – from a few hours to a full day – and so is not directly comparable to long day care fees.

**Table 23: Average OSHC Fees per session over time**

	Late 2012	Mid 2014
BSC	\$10.62	\$13.00
ASC	\$14.98	\$17.50
VAC	\$39.36	\$50.00

Respondents were cognisant of the pressures families may experience trying to afford a children's services fee. Some services charged different fees to families in different circumstances, while others kept overall fees as low as possible to meet operating costs expenditure.

*We do offer fee subsidy for families with a low income health care card.*

*Respondent*

*We have a fee differential for students and general community members.*

*Respondent*

<sup>10</sup> Including GoodStart data brings the median daily fee down to \$78.75

## Fee Increases

Three-quarters (77%) of services increased their fees in the 12 months to mid 2014. The median increase for long day care was \$4 per day and for preschool \$3 per day.

The reasons given for fee increases were similar to previous TICCS surveys. The main reason identified for fee increases was the normal rise in cost of living (CPI) with half of services (48%) listing this as number one.

*We are in a low socio economic rural area and parents can't afford to pay any more than what they are paying.*  
Respondent

Recognising the need for better wages for educators, increased staff wages was cited as the number two reason (30%) for fee increases, while changes to meet increased minimum regulatory standards was at number three (20%).

## Reactions to fee increases

Nearly one-third of services (30%) reported no negative reaction to their fee increases. This is a reduction from the 55% in both surveys in 2012.

*Our families are prepared to pay a premium for the additional staffing we have in the service*  
NSW Respondent

80% reported that some or many families said they understand the reasons for the fee increases. Over 60% of services had no families leave the service due to fee increases.

However 50% of services stated families did reduce their hours and/or express frustration at increases and 45% stated they were under financial stress because of the increase.

**Table 24: Families Reaction to Fee Increases over Time**

	% of services <sup>11</sup>	
	2012	2014
Families expressing no negative reaction	55	30
Families expressed frustration due to the increase	28	62
Families said they are under increased financial stress due to the increase	23	59
Families leaving your service due to the increase	16	38
Families reducing hours/days with your service due to increase	36	59

*When the CCR drops out at the end of financial year people [will] find it tough going to full fee for the last few months of the year.*  
Vic Respondent

Given that the fee increases were largely routine, it appears that this is more likely to be due to general costs of living pressures than an impact of the NQF.

<sup>11</sup> Add to more than 100% as some services reported multiple responses

# National Quality Reforms:

## Experiences with the NQF: The First Two Years

Overall, the TICCSS data shows services continuing to integrate the NQF into their operations and practice. Two years into the reforms, 28% of services stated the NQF meant normal business or reduced workload for them, up from 18% in 2012.

*The framework has improved the whole service.*

*Vic Respondent*

However, as with many new systems, there were signs of services still adapting to the new reporting requirements with over a third (38%) of services stating the NQF had greatly increased their workload and 31% reporting that their workload had slightly increased.

*We love the NQF and its reflective nature. The flexibility it affords leads to great collaboration and outcomes at our service.*

*QLD Respondent*

For the first time, TICCSS has gathered information about the highlights of the last 12 months as well as the issues and challenges.

*Educators are not paid for the quality work that is being done on a daily basis. No point having all these new frameworks when staff are paid peanuts.*

*Qld Respondent*

### Issues Facing Services

The top issues for services were:

1. Increased paper work to meet legal obligations and government regulations (40% down from 80% to 84% in the 2012 surveys)
2. Insufficient paid time to complete tasks (36% down from 60%)
3. Inadequate wages for educators (33%)

**Table 25: Main issues experienced in last 12 months**

% of services

Increased paperwork to meet legal obligations and government regulations	40
Insufficient paid time to complete tasks	36
Inadequate wages for educators	33
Inability to recruit suitably qualified educators	24
Lack of professional recognition for educators	24
Uncertainty about the future of education and care policy and funding	22
Educators reluctance to embrace change	18
Inconsistent messages from your state/territory regulatory authority	13
Too high a cost for 'physical' changes to building or playgrounds	10
Other	10
Inconsistent messages from ACECQA	9
Too high a cost for additional equipment/resources	8
Educators have issues understanding, monitoring and applying mixed group ratios	7
Untrained educators have resigned rather than complete Cert II training	5
None of the above	3

The first two issues are unchanged from 2012, though occurring in far fewer services. Wages and lack of recognition for the work have risen in the priority order of challenges



facing services. Interestingly, staff reluctance to embrace change has dropped to number seven (18%), having dropped in the first two waves of TICCSS from number two to number four. This suggests that the workforce is coming to terms with the benefits of the extra work associated with changing long established practices, to continually review and adjust practices in light of the best research and individual professional experience.

*We are still yet to rated and assessed. Whilst we have a great working relationship with our state authority, their work load has made them less accessible to us and therefore some of the benefits of the collaborative nature of the NQF are lost.*

*NSW Respondent*

*Many of our staff are highly motivated and spend many non-paid hours resourcing and debating the NQF and EYLF. Training should have been funded and staff efforts should be recognised with an extra increase in pay.*

*WA Respondent*

In response to an open question, there were few comments on the NQF being administratively burdensome or unnecessary. In comparison there were more expressions of support for the NQF and standards and concern that the current Federal government will reverse the progress.

The largest not for profit provider in Australia, GoodStart Early Learning expressed its active support.

*Goodstart Early Learning supports the National Quality Framework, particularly the staff qualifications and ratio requirements. We also support the Assessment and Ratings process.*

### Highlights of the last Twelve Months

As a testament to the rigour of the NQF in achieving its intended goals, TICCSS shows that a large minority of services see the Quality Improvement Plan as resulting in improvements in their service, with educators becoming more interested and engaged, and engaging more in reflective practice. Most importantly, one-quarter of services observed improved learning outcomes for children as a result of the NQF reforms.

*The NQF has set out clearer and more appropriate expectations and so the team has a better understanding of our expectations. Staff are empowered to see the whole child (i.e. belonging being and becoming) in programming*

*NSW Respondent*

**Table 26: Highlights of last Twelve Months**

	% of responses
Developing and implementing the QIP has led to improvements at our service	40
Educators are more interested and engaged in programming and planning	33
Educators regularly engage in reflective practices	33
Improved learning outcomes for children	27
Service is more focussed on meeting individual children's needs	19
The quality of education and care offered at our service has improved	16
Families have noticed improvements in the service	16
Our service is working more closely with the wider community	15
The higher educator:child ratios have improved outcomes for children	12
The service meets families' needs in a more flexible way	12
Educators at the service receive increased recognition for their professional role	11
Administration and paperwork is more streamlined	9
None of the above	6

Respondents commented on how they have thrived under the reforms and how the assessment and rating process and wider acknowledgement for educators was rewarding.

Clearly there is still a way to go before the majority of services report these highlights; but the NQF reforms still have several years to roll out to full implementation so it is heartening to see clear positive change occurring as a result of the reforms to date.

### Quality Areas

*There has been ongoing improvement in all the Quality Areas as educators engage in reflective practice and around pedagogy and practice.*

*Vic respondent*

Another new section of the TICCSS in 2014 is an exploration of which Quality Areas the services are seeing positive change in.

Nearly three-quarters (72%) are seeing positive change in QA 1: Educational Program and Practice. Over half (52%) are seeing positive change in QA 3: Physical Environment and QA 6: Partnerships with Families.

There have also been strong gains in all other Quality Areas, with at least 42% of services reporting positive change in every area.

**Table 27: Quality Areas Where Services have Implemented Positive Change**

	% of respondents
QA1: Educational program and practice	72
QA2: Children's health and safety	44
QA3: Physical environment	52
QA4: Staffing arrangements	42
QA5: Relationships with children	46
QA6: Collaborative partnerships with families and communities	52
QA7: Leadership and service management	47

## Waivers

Waivers from meeting the *Education and Care Services National Regulations* support services that, for one reason or another, cannot immediately meet some of the new NQF standards.

These waivers are available to all services through an application process with ACECQA. TICCS reveals that there is no change in the percentage of services operating under waivers. As in past waves of TICCS, in 2012 the vast majority (90%) of the sector is meeting the NQF without the need for any waivers.

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

A staff qualification waiver continues to be the most common (53 services), followed by educator and child ratio waiver (8 services) and outdoor space waivers (5 services). Most of the qualifications waivers are in relation to employment of Early Childhood Teachers (33 services), followed by Diploma (11) and Certificate III (10)<sup>12</sup>.

## Assessments

*It was very positive. All the staff who were here had never been through the process before and they really needed that experience. It's an important process that EC must stick with for the future of quality childcare. WA Respondent*

At the time of the 2014 TICCS survey, half of the responding services had undergone an assessment under the NQF. Nearly two-thirds of these (60%, 228) had a positive or extremely positive view of the accuracy of the rating they had received. Only 17% (44 services) had a negative or extremely negative view of the accuracy of their final rating.

Nearly three-quarters (70%, 253) viewed the clarity of the process as positive or extremely positive.

Most of the negative responses were in relation to:

- The process of review and providing feedback on the draft report
- Timely reporting of outcomes
- Usefulness of the report
- Accuracy of the final rating

A number of respondents raised issues of inconsistencies (across services, different time that the assessment had been made etc.). Another re-occurring theme was disappointment that the reports did not provide constructive feedback on how to improve.

Another issue raised was that of requiring services to “apply” and “pay” for the excellent rating system and how a service that had not received a rating in all quality areas of exceeding National Quality Standard could still apply for an excellent rating. This was seen to jeopardise the integrity of the process and validity of the excellent rating. There was a suggestion that any service that is rated as exceeding NQS in all quality areas should automatically receive an “excellent” rating.

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<sup>12</sup> Note that some services had more than one waiver.

There were issues across FDC and OSHC where the assessor and the process of assessment were considered to be inconsistent or otherwise inappropriate.

*The process is a vast improvement on the old lottery that was the Accreditation system. However with four OOSHC services and one LDC service all going through the system we can see inconsistency already becoming an issue. A policy or practice or procedure deemed to be meeting or exceeding NQF by one compliance officer will be criticised and marked down by another at a different time.*

*NSW Respondent*

**Table 28: Services Experience of Assessment and Rating**  
 % of services which had received rating

	<b>Extremely negative</b>	<b>Negative</b>	<b>Neutral</b>	<b>Positive</b>	<b>Extremely Positive</b>
The accuracy of the final rating from your point of view	5	12	12	33	27
The clarity of the process to you and your staff	2	7	17	43	25
The ease of the process and its impact on the running of your service	3	10	21	38	21
The impact on quality improvement at your service	2	1	15	51	23
The knowledge of the assessors around early childhood service delivery	3	7	14	40	27
The process for services to review and provide feedback on the draft report	6	10	16	39	17
The provision for services to make minor adjustments	3	7	17	40	17
The skill of the assessors	3	6	20	37	27
The timely reporting on outcome of assessment	5	12	14	37	22
The usefulness of the assessment and ratings report	5	6	18	37	23

## Ratings

*Our service has always been very highly regarded in the community with long waiting lists. Our biggest area that we needed to improve was sustainability. We received an exceeding rating in all 7 areas of the NQS.*  
*NSW Respondent*

Nearly 700 respondents provided their NQS rating. Of these, two-thirds were rated as meeting or exceeding the NQS. None required significant improvement.

**Table 29: Ratings Received** (including GoodStart Services)

	No. of services	Percent
significant improvement required	0	0%
working towards the NQS	212	30
meeting the NQS	290	42
exceeding the NQS	172	25
unsure/cannot comment	22	3

The respondents to the TICCS survey, predominantly not-for-profit community services, on average are rating at a better level than the sector overall.

**Table 30: Ratings Received Compared with National Results**

	TICCSS responses (excluding GoodStart services)	National Ratings to 30 June 2014 <sup>13</sup>
	Percent	Percent
significant improvement required	0	0.1
working towards the NQS	21	38
meeting the NQS	37	36
exceeding the NQS	36	26
excellent	0	14

<sup>13</sup> ACECQA NQF Snapshot Q2 2014: A quarterly report from the Australian Children's Education and Care Quality Authority August 2014

# Communities and vulnerabilities

## Vulnerable Children

*I think that perhaps we are getting better at identifying and supporting parents and children with vulnerabilities, and through hard work are also creating stronger and more interactive relationships with family support networks. It often feels that this is at the expense of family privacy and confidentiality, or that at least we have to argue that there is a case for sharing information professionally.*

*Vic Respondent*

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

Having strong connections and relationships with children and families often means that ECEC services are aware of challenges and vulnerabilities in their communities earlier than targeted child protection services.

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

*Low income and financial pressures, housing difficulties, money for food, transport difficulties, domestic violence. The gap fee is too large for many vulnerable families so we access time-limited Special Child Care Benefit, but when this ends we often end up subsidising this so families continue to attend.*

*SA Respondent*

TICCSS provides a picture of emerging vulnerabilities across Australia and how children's services support children and their families.

## Key Facts

- The vast majority of services have children they identify as vulnerable and the percentage of services with vulnerable children is unchanged at 83%.
- However, there was an increase in the percentage of services reporting growth in the number of vulnerable children in their communities over the last six months, from one-quarter in 2012 to one-third (32%) in 2014, while 57% reported no change and three per cent reported a decrease.
- Once again, only half of all services (48%) have only a few vulnerable children, nearly a third (29%) have some and six per cent reported that the vast majority of their children were vulnerable
- A similar increase occurred in the percentage of services which notices a change in the types of vulnerability in their communities, up from one-quarter in 2012 to nearly one-third (29%) in 2014.

*Staff with better training and experience are ensuring that these children have better outcomes.*

*WA Respondent*

*There are more families in financial crisis, more in family crisis due to changes in circumstances and more in crisis due to one or more partner requiring assistance for mental health or substance abuse. In addition more families are in crisis ... without networks or support*

*NSW Respondent*

*There are quite a few children just wanting someone to talk to and to help through any problems that they feel they cannot discuss with parents and teachers and turn to us to help them as much as we can through also involving the school. Qld Respondent*

*We are situated in a community where near public housing and low socio economic families. Many families are refugees status or have recently been sponsored over by their family... The whole family are finding it hard to connect to services and children are not engaged with any educational or health service until they start a early childhood service.*

*Vic Respondent*

# Methodology and Research Design

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## Research Aims

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

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

## Research Design

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

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

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

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

The research is designed to gather data on the following:

### Demographics

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

### Workforce

- Percentage of educator vacancies
- Ease/difficulty in recruiting



- Quality of qualifications and applicants
- Support offered for staff professional development

#### Fees:

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

#### National Quality Reforms:

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

#### Communities and vulnerabilities

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

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

### **Survey Distribution**

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

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

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

### **Evaluation**

ACCS has built in an evaluation process after each wave of the TICCS. The evaluation focuses on the following points:

1. The uptake of survey participation across states and territories, metro and regional and service types
2. The completion rate of the survey (are services comfortable with answering all questions, does it appear they struggle with some questions in particular)
3. The process of analysis of the survey (can it be more robust and/or streamlined)
4. The dissemination of the report and uptake of the data externally

### **Current Limitations**

TICCS findings are framed around an acknowledgement of the limitations of the research methodology.

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

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

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

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

If you have any questions regarding to TICCSS methodology or data or ACCS more generally please contact ACCS Secretary at [secretariat@ausccs.org.au](mailto:secretariat@ausccs.org.au)