
**Early Learning and Childcare Workforce
Final Report
for
Scottish Government and COSLA**

30th October 2019



This report is based on independent research and analysis carried out by ekosgen.

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1 Scotland's Early Learning and Childcare Workforce

Introduction

1.1 Ekosgen was commissioned by the Scottish Government and partners to undertake research into the local and national labour market implications for social care in Scotland. The objectives of the study were to provide insights into the way local and national labour markets impact on the social care workforce, how different parts of the social care sector interact, and what these interactions mean for workforce planning locally and nationally.

1.2 Given the crucial stage in Early Learning and Childcare (ELC) development in Scotland, the research outputs include specific analysis of the ELC workforce and the labour market implications. This report focuses on the ELC sector drawing on survey findings and stakeholder consultations, as well as drawing on workforce data sourced from the Scottish Social Services Council (SSSC), Skills Development Scotland (SDS) and the Scottish Funding Council (SFC), and existing reports. It is intended to accompany the main research report, which covers both the adult and children's services social care workforce¹.

1.3 In addition to this report focussing exclusively on the ELC sector, the main report is accompanied by a case study report which explores key local labour market characteristics and issues around recruiting into the social care sector in areas with different labour market conditions, and a report examining the implications and key considerations for workforce planning in the social care sector.

Expansion of Early Learning and Childcare

1.4 Aside from the direct economic contribution, good quality, accessible ELC is a key tool for tackling inequalities and improving the outcomes for Scotland's children. Recognising this, the Scottish Government passed the Children and Young People Scotland Act (2014) which stipulates that entitlement to free ELC for all three and four year olds, and 27% of the most vulnerable two year olds, increased from 475 hours per annum to a minimum of 600 hours. By 2020, the Scottish Government will increase this free entitlement to 1,140 hours per year. To achieve this, the Scottish Government estimates that the expansion of funded ELC to 1,140 hours by 2020 will require the recruitment of between 8,000 and 11,000 additional ELC staff². This expansion will also have to increase at a time when the social service workforce overall may tighten as a result of Brexit and demographic factors.

1.5 A Blueprint for 2020: The Expansion of Early Learning and Childcare in Scotland: Quality Action Plan³ recognises that the *quantity* of people in the workforce is only one factor, the workforce must also be of a high *quality* if the increase in provision is to successfully achieve its objectives for Scotland's children. It also states the Scottish Government's commitment to creating a more diverse ELC workforce that better reflects wider society. It states that, coupled with a recruitment marketing campaign, it will:

“Work with delivery partners... to raise the profile of a career in ELC amongst under-represented groups”.

¹ The social care workforce includes both children's services (i.e. adoption services, fostering services, residential childcare and fieldwork services) and adult services (i.e. adult day care, adult placement services, care homes, housing support/care at home for adults, nurse agencies, offender accommodation services, and fieldwork services).

² <https://digitalpublications.parliament.scot/ResearchBriefings/Report/2019/4/16/The-expansion-of-early-learning-and-childcare>

³ A Blueprint for 2020: The Expansion of Early Learning and Childcare in Scotland – Scottish Government (2017) <https://www.gov.scot/Resource/0052/00526782.pdf>

1.6 The national ELC Skills Investment Plan (SIP) was developed in 2017⁴. The focus of the SIP was to provide robust evidence of the current skills base and profile of the sector and give employers and stakeholders a clear direction on what it can do to attract a wider and more diverse range of high quality candidates in order to fuel its expansion. It presented a strategic plan to:

- ensure the current and future workforce have the skills required to provide quality care and impact positively on the outcomes for Scotland’s children;
- contribute to the professionalisation of the workforce and encourage positive perceptions of the sector as a career destination offering development and progression opportunities; and
- build on the positive working relationships between partners on the skills supply side and those on the demand side, including employers and organisations that represent their interests.

The Early Learning and Childcare sector

Sector Definition

1.7 The definition of ELC used by the SSSC is provided in Table 1.1.

Table 1.1: Sub-sector workforce definition for ELC

Sub-sector	Definition
Day care of children (DCC)	A service which provides care for children on non-domestic premises for a total of more than two hours per day and on at least six days per year. It includes nursery classes, crèches, after school clubs and play groups. The definition does not include services which are part of school activities. Nor does it include activities where care is not provided such as sports clubs or uniformed activities such as Scouts or Guides.
ELC	This is a sub-part of DCC, and refers to those DCC services which are funded by Government to provide the free pre-school offer of 600 hours currently and soon to become 1140.
Childminding	A childminder is a person that looks after at least one child (up to the age of 16 years) for more than a total of two hours per day. The childminder looks after the child on domestic premises for reward but not in the home of the child’s parent(s). A parent/relative/foster carer of the child cannot be regarded as his/her childminder.

1.8 Currently, funded ELC is available to all three and four-year olds and eligible two year olds in Scotland, accounting for the provision of 600 free hours for each child per year. It should be noted that whilst some childminders provide funded ELC, the vast majority do not. The Scottish Childminding Association (SCMA) reported recently⁵ that around 13% of childminders in Scotland have been approved by local authorities to deliver funded hours for all three and four-year olds⁶ and only 16% have been approved by local authorities to deliver funded hours for eligible two-year olds⁷.

1.9 For this reason, the definition of ELC for the rest of the report will include DCC and childminders, although data for both will be separated out where possible, and the narrative will focus mainly on DCC.

Business Base

1.10 The SSSC report published in August 2018 shows that there were over 202,000 people employed in over 13,000 social service workforce roles in Scotland in December 2017. Table 1.2

⁴ Skills Investment Plan for Scotland’s early learning and childcare sector – Skills Development Scotland (January 2017) <https://www.skillsdevelopmentscotland.co.uk/media/44206/early-learning-and-children-sip-digital.pdf>

⁵ Early Learning and Childcare Audit – SCMA (October 2019) https://www.childminding.org/Media/Docs/Common/SCMA%20ELC%20Audit%20Report%202019_FINAL.pdf

⁶ With even less (4.2%; n=199) currently actually delivering funded hours during phased expansion.

⁷ And even less (3.3%; n=156) are currently actually delivering funded hours during phased expansion.

indicates the breakdown of services by type of employer, and employment. It suggests that, on average, employers in the public and voluntary sector are larger than those in the private sector. It is also worth highlighting that childminders account for around 40% of employers, many of whom do not employ any staff. Excluding childminders gives just under 8,000 social service providers in Scotland in December 2017.

Table 1.2: All social care service types and employment, by employer type (2017)

Employer type	Services		Employment	
	Number	%	Number	%
Private sector	7,920	60%	83,150	41%
Voluntary sector	2,661	20%	56,020	28%
Public sector	2,630	20%	62,890	31%
Total	13,211	100%	202,090	100%

Source: SSSC Workforce Data, 2017

1.11 At the end of 2017 there were 8,939 active DCC and childminding services in Scotland, as shown in Table 1.3. Between the end of December 2016⁸ and the end of December 2017, the number of services declined by 3%, mainly driven by a decline in the number of childminders, although DCC also fell slightly.

Table 1.3: Change in DCC and childminding services, 2016 and 2017

No. of services registered with the CI	Dec 2016	Dec 2017	% change
Childminding	5,509	5,257	-4.6
DCC	3,710	3,682	-0.8
Total	9,219	8,939	-3.0

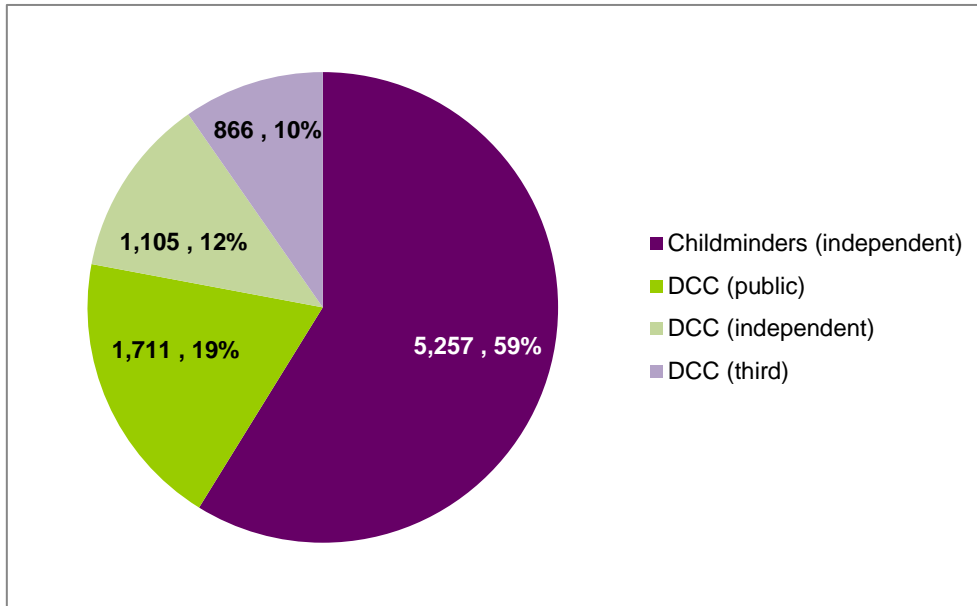
Source: SSSC Workforce Data 2017

1.12 Figure 1.1 shows that almost 60% of active services are childminders who are self-employed and operating in the independent sector. At 46%, the public sector provides almost half of the 3,682 DCC services whilst the independent and third sectors account for 30% and 24% respectively⁹.

⁸ The figures recorded at the end of December 2016 reflect 2016 data, whilst the data from December 2017 reflects 2017 workforce data.

⁹ The SSSC typically uses the terms 'public, private and voluntary sector' in their workforce data reports. This study generally uses third, independent and public sectors, but uses the SSSC's preferred terminology where relevant.

1.1 Figure 1.1: DCC and childminding services by employer type, 2017



Source: SSSC Workforce Data 2017

1.13 The sector profile across local authority areas varies considerably which is important in planning how skills development is supported and shortages addressed. Illustrating this, in East Ayrshire, childminders account for 75% of all services in the area whilst the corresponding figure for Glasgow is 32% as shown in Table 1.4. Bear in mind that these figures don't take into account whether the average capacity or workforce is larger in some areas.

Table 1.4: DCC and childminding services, by employer type and local authority, 2017

Local authority	Childminding	DCC			
	Total	Independent	Public	Third	Total
Aberdeen City	164	57	69	37	163
Aberdeenshire	363	62	104	59	225
Angus	166	27	49	29	105
Argyll & Bute	76	13	48	19	80
Clackmannanshire	64	6	16	3	25
Dumfries & Galloway	129	24	45	25	94
Dundee City	157	35	29	21	85
East Ayrshire	185	9	35	17	61
East Dunbartonshire	137	36	22	23	81
East Lothian	134	17	32	34	83
East Renfrewshire	141	31	22	6	59
Edinburgh, City of	359	158	102	101	361
Falkirk	196	16	54	25	95
Fife	474	38	170	38	246
Glasgow City	173	136	116	109	361
Highland	284	41	140	50	231
Inverclyde	60	8	21	11	40
Midlothian	93	21	29	31	81
Moray	118	20	22	23	65
Na h-Eileanan Siar	27	1	20	5	26
North Ayrshire	180	21	44	12	77
North Lanarkshire	340	58	95	23	176
Orkney Islands	31	2	21	0	23
Perth & Kinross	170	43	61	17	121
Renfrewshire	91	59	38	15	112
Scottish Borders	119	15	47	30	92
Shetland Islands	16	4	22	4	30
South Ayrshire	104	13	42	13	68
South Lanarkshire	290	67	80	29	176
Stirling	114	17	32	15	64
West Dunbartonshire	47	18	21	9	48
West Lothian	255	31	63	33	127
Total	5,257	1,105	1,711	866	3,682

Source: SSSC Workforce Data, 2017

1.14 Patterns also vary in terms of the balance between independent, third and public sector provision with the highest proportions of independent sector provision (excluding childminders) in East Renfrewshire, Renfrewshire, Edinburgh and East Dunbartonshire. Islands communities tend to have the highest proportion of public sector providers perhaps reflecting the fact the independent providers may find it more difficult in rural areas to establish and sustain a viable business.

The ELC Workforce

1.15 There were approximately 39,280 people working in DCC and childminding services in 2017.¹⁰ Almost half of the workers were employed in the independent sector although this is skewed because the 5,260 childminders are included. Taking childminders out of the equation, of the 34,020 employed in DCC services, 42% work in the public sector, 40% in the independent sector and 19% in the third

¹⁰ Scottish Social Services Sector: Report on 2017 Workforce Data – SSSC (2018)
<https://data.sssc.uk.com/images/WDR/WDR2017.pdf>

sector. This compares to 40%, 41% and 19% respectively in 2016 meaning there has been a 2% increase in the share of public sector employees and a 1% decrease in the independent sector.

1.16 In 2019, SSSC published a report on the children's services workforce¹¹, which presents data on the funded ELC sector. The report shows that, in 2017, there were 2,616 ELC services in Scotland, the majority of which were public sector (60%), followed by 26% in the independent sector and 14% in the third sector. These services employed an estimated 26,300 staff in 2017, and again many of the staff were employed by public sector services (50%), with 39% working for the independent sector. At 11%, a small share of ELC staff was working in the third sector.

1.17 In contrast to the decline in the number of services, the number of people employed in DCC services has risen by 1% since 2016, as illustrated in Table 1.5. This implies the closure of smaller services, expansion of larger ones, mergers, and possibly a combination. It is largely accounted for by an increase of over 700 staff in DCC public sector services over this period.

Table 1.5: Change in DCC and childminding workforce, 2016 and 2017

Sub-sector	2016		2017		Change in number of staff (%)
	Number of staff (headcount)	% of staff	Number of staff (headcount)	% of staff	
Childminding of which:	5,510	14%	5,260	13%	-5%
<i>Self-employed</i>	5,510	100%	5,260	100%	-5%
DCC of which:	33,430	86%	34,020	87%	2%
<i>Independent</i>	13,700	41%	13,450	40%	-2%
<i>Public</i>	13,380	40%	14,120	42%	6%
<i>Third</i>	6,350	19%	6,440	19%	1%
Total	38,940	100%	39,270	100%	1%

Source: SSSC Workforce Data, 2016 and 2017; Figures may not sum to 100% due to rounding¹²

1.18 Aberdeen, Edinburgh (both 55%) and Renfrewshire (52%) have the highest proportions of DCC workers in the independent sector. Eilean Siar (71%), Orkney and Clackmannanshire (both 67%) have the highest proportions in the public sector.

1.19 Unsurprisingly, Glasgow and Edinburgh account for the biggest numbers of DCC and childminder, at 4,670 and 4,240 respectively. Combined, these two cities account for 23% of Scotland's DCC and childminders, higher than their share of the country's total population (21%).

1.20 In terms of the density of DCC and childminders, measured as the number of these workers per 10,000 population, the national average is 72. This is highest in Argyll and Bute (107), Dundee City (104) and Angus (101), and lowest in Orkney (50), Dumfries and Galloway (53) and North Ayrshire (54).

1.21 Table 1.6 shows that the majority of staff (85%) working in DCC services are Practitioners¹³. Managers account for 10% of the total workforce and Support Workers the remaining 5%. This is broadly

¹¹ The Children's Services Workforce 2017 – SSSC (January 2019) https://data.sssc.uk.com/images/WDR/CSW/Childrens_Services_Workforce_2017.pdf

¹² Figures may not sum to 100% due to rounding

¹³The SSSC registers staff by their job function: Managers, Practitioners and Support Workers. Managers/lead practitioners are workers who hold responsibilities for the overall development, management and quality assurance of service provision including the supervision of staff and the management of resources. Practitioners in DCC services are workers who identify and meet the care, support and learning needs of children and contribute to the development and quality assurance of informal learning activities and/or curriculum. They may also be responsible for the supervision of other workers. Support workers in DCC

consistent when split by employer type, with the exception that a higher share of public sector DCC workers is Practitioners (87%) and a higher share of third sector DCC workers are Managers (13%).

Table 1.6: DCC and childminding workforce, by employer type and role, 2017

Sub-sector	No of staff	Admin., Support and Ancillary Workers		Class 2/3 Care Workers		Class 4 Care Workers		Managers, Directors & Chief Executives		Not known	
Childminding, of which:	5,260	0	-	0	-	0	-	0	-	5,260	100%
Self-employed	5,260	0	-	0	-	0	-	0	-	5,260	100%
DCC, of which:	34,010	1,690	5%	27,540	81%	1,260	4%	3,480	10%	40	<1%
Independent	13,450	840	6%	11,040	82%	190	1%	1,370	10%	10	<1%
Public	14,120	520	4%	11,410	81%	910	6%	1,270	9%	20	<1%
Third	6,440	330	5%	5,090	79%	160	2%	840	13%	10	<1%
Scotland DCC and Childminding	39,270	1,690	4%	27,540	70%	1,260	3%	3,480	9%	5,300	13%

Source: SSSC Workforce Data, 2017; Figures may not sum due to rounding

1.22 Table 1.7 reflects the lack of diversity in both the DCC and childminding services workforce when compared to the Scottish workforce as a whole. The most recent SSSC workforce data¹⁴ indicates that whilst childminders are markedly older on average, they are even less diverse in terms of gender, ethnic minority people and people with disabilities. The DCC workforce is overwhelmingly female (96% are women), and relatively young when compared to the national workforce, although the age profile varies between sectors. Independent sector employees in DCC services have a median age of 28 years while the median age of their public sector counterparts is 43. It is worth noting that SSSC data around ethnicity and disability has a high proportion of unknown responses.

Table 1.7: Workforce profile, 2017

Characteristic	DCC workforce	Childminding workforce	Scotland workforce
Average age	26 years	43 years	Unknown
Aged 35 or over	54%	86%	65%
Gender	96% females, 4% males	100% female, 0% male	49% female, 51% male
Ethnic minority	91% white, 1% Mixed, Asian, Black	98% white, 1% Mixed, Asian, Black	96% white, 3% Mixed, Asian, Black
Disability	96% no disability, 2% disability	99% no disability, 1% disability	87% no disability, 13% disability

Source: SSSC Workforce Data 2017

1.23 Staff in DCC services must be registered with SSSC and must either hold or be working towards a relevant qualification for their role. As at September 2015, over 70% of the DCC workforce registered with SSSC held the qualification required for Registration, accounting for 83% of all Practitioners and 32% of all Managers¹⁵. The low level for Managers is partly explained by recent changes to the qualifications requirements for the role and also that a proportion of them could be registered with the General Teaching Council. For both roles, the proportions of qualified staff are significantly higher in local authority settings than in independent and third sector provider settings.

services are workers who have delegated responsibility for providing care and support to children. More information is available from: <https://www.sssc.uk.com/knowledgebase/category/?id=CAT-01340>

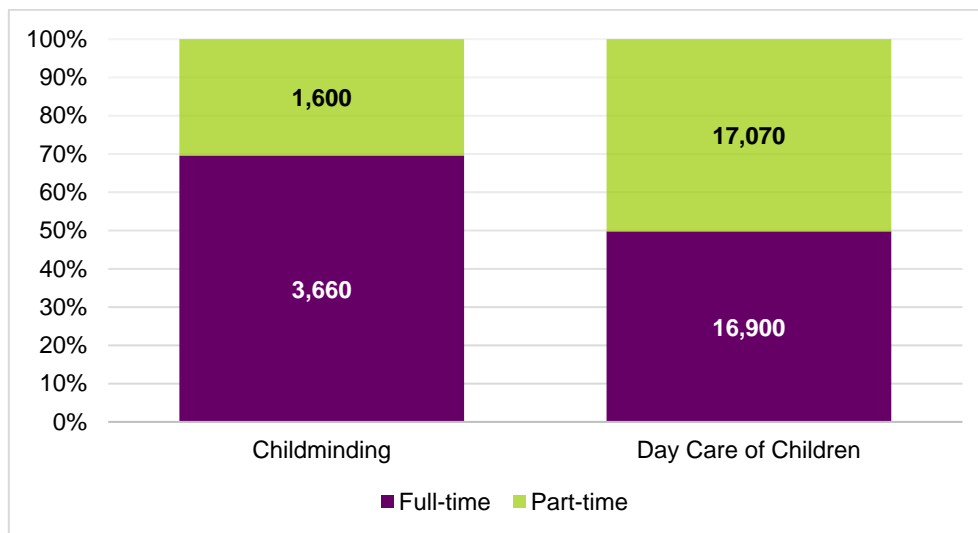
¹⁴ This was published in August 2018 comprising data collected in December 2017.

¹⁵ SSSC Register (September 2017)

Employment in Early Learning and Childcare

1.24 Childminders are more likely to work full time than staff in DCC services (70% and 50% respectively), as shown at Figure 1.8. Areas with a high proportion of part time workers in DCC are Eilean Siar (76%), Highland (75%) and Shetland (73%). Lowest levels are in Dundee City and South Lanarkshire (both 42%) and in Glasgow and Renfrewshire (both 40%). What is not clear is the extent to which local patterns of working hours are driven by choice, or opportunity. Working hours may have implications for staff to access learning, for example, if they work part time, it may be more difficult to participate during working hours.

Figure 1.8: Full-time and part-time employment in DCC and childminding services, 2017



Source: SSSC Workforce Data, 2017; Figures may not sum due to rounding¹⁶

1.25 The type of contract can also influence the training and learning that workers can access. Table 1.9 shows that 19% of employees (excluding childminders) do not have a permanent employment contract e.g. they are on temporary or fixed term contracts or work as sessional, relief or bank staff. This is likely to have an impact on the continuity of training provision, and employers may be less willing to invest in the training and development of staff who are not permanently employed.

Table 1.9: Contract types in the DCC workforce, 2017

Contract type	%		Change
	2015	2017	
Permanent ¹⁷	79%	81%	+2pp
Temporary	7%	7%	No change
Sessional	3%	3%	No change
Casual/Relief	3%	3%	No change
Trainee	3%	2%	-1pp
Fixed Term	2%	2%	No change
Bank	1%	1%	No change
Other	1%	1%	No change
Scotland	100%	100%	-

Source: SSSC Workforce Data Report, 2017, p.39; Figures may not sum due to rounding

¹⁶ Part-time employees are those who work 30 hours per week or less. Full-time employees are those who work more than 30 hours per week. This is consistent with the definition developed by OECD.

¹⁷ Includes those on No Guaranteed Hours contracts, a type of zero-hours contract

Vacancies in Day Care of Children Services

1.26 Whilst the number of job vacancies in DCC has increased, the specific skills in demand remain broadly the same. Table 1.10 shows that the vacancy number has increased by just under 50% over a 12 month period. For both years, childcare was the specific skills in greatest demand. The generic skills in greatest demand were consistent across both years; these were planning and communication skills¹⁸. By geography, the top three local authority by job postings were Edinburgh, Fife and Highland.

Table 1.10: Vacancy data

Contract type	2017/18	2018/19
Total vacancies	1,550	2,262
Top 5 specific skills	Childcare	Childcare
	Social services	Social services
	Child development	Teaching
	Teaching	Child development
	Child protection	Service improvement

Source: Burning Glass data, SDS¹⁹

1.27 Data for 2017/18 shows that there was a demand for experienced staff in the sector, with 84% of employers asking for 3-5 years of experience. Similarly, 79% of employers required qualifications at SVQ Level 3/ HNC or above

1.28 At 23%, vacancy rates for DCC services are significantly below the national average (38%) of all registered services, but they have increased since 2016, as Table 1.11 illustrates. Vacancy rates vary by sector (with Business Services experiencing 24% in 2017, Education reporting 22%, Wholesale and Retail reporting 18%, and Hotels and Restaurants at 17%) but as a proportion of all vacancies in the sector, the vacancy rate was highest in Construction where almost two in every five vacancies were proving hard to fill due to difficulties in finding applicants with appropriate skills, qualifications or experience²⁰.

1.29 In addition, 39% of DCC services with vacancies in 2017 reported having problems filling them. Again, this is below the national average for all care services, but has grown slightly from a 37% rate in 2016, and is likely to increase as we move towards expansion in funded childcare hours.

Table 1.11: Vacancy rates for DCC, 2016 and 2017

	2016		2017	
	DCC	All care vacancies	DCC	All care vacancies
Vacancy rate	19%	35%	23%	38%
Of which, hard-to-fill vacancy rate	37%	43%	39%	45%

Source: Care Inspectorate Reports 2016 and 2017 - Staff vacancies in care services

Current skills provision

1.30 A wide range of provision is in place to support the development of skills for the ELC sector including apprenticeships, college and university provision and work based training. There are a range

¹⁸ Taken from Burning Glass information relating to DCC for the financial years 2017/18 and 2018/19 (excluding March 2019).

¹⁹ Burning Glass data for ELC was provided for the financial years 2017/18 and 2018/19 (excluding March 2019).

²⁰ Employer Skills Survey – Department for Education (August 2018) <https://www.gov.uk/government/publications/employer-skills-survey-2017-uk-report>

of qualifications which can be undertaken by people in different roles in the ELC sector, as illustrated in Table A1 (in Appendix A). These have different purposes and are applicable to individuals in different settings and at different levels, from Scottish Vocational Qualifications (SVQs) that deliver work-based learning for people already working in the sector, to degree courses in Early Years and Childhood Practice.

Alignment of survey sample with the Day Care and Children and Childminding workforce

1.31 Table B.1 (in Appendix B) shows how the profile of the employees responding to the research survey compares to the overall DCC and childminding Services workforce in Scotland (as defined through the latest SSSC Workforce Report²¹). Employees and employers were asked to identify the type of service they worked in, and the responses from those people who identified as either 'Childminding' or 'Day care of children (including ELC)' were analysed.

1.32 Our sample provides robust primary data and is generally representative of the overall DCC workforce by gender, age and geography. However there are some key points to note:

- The survey is over-represented in terms of childminders, which may be due to this group being asked to complete the employee survey, whilst actually being classified as employers themselves; and
- The survey is over-represented by full-time workers when compared to the workforce (67% compared to 52%).

²¹ Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018)
<https://data.sssc.uk.com/images/WDR/WDR2017.pdf>

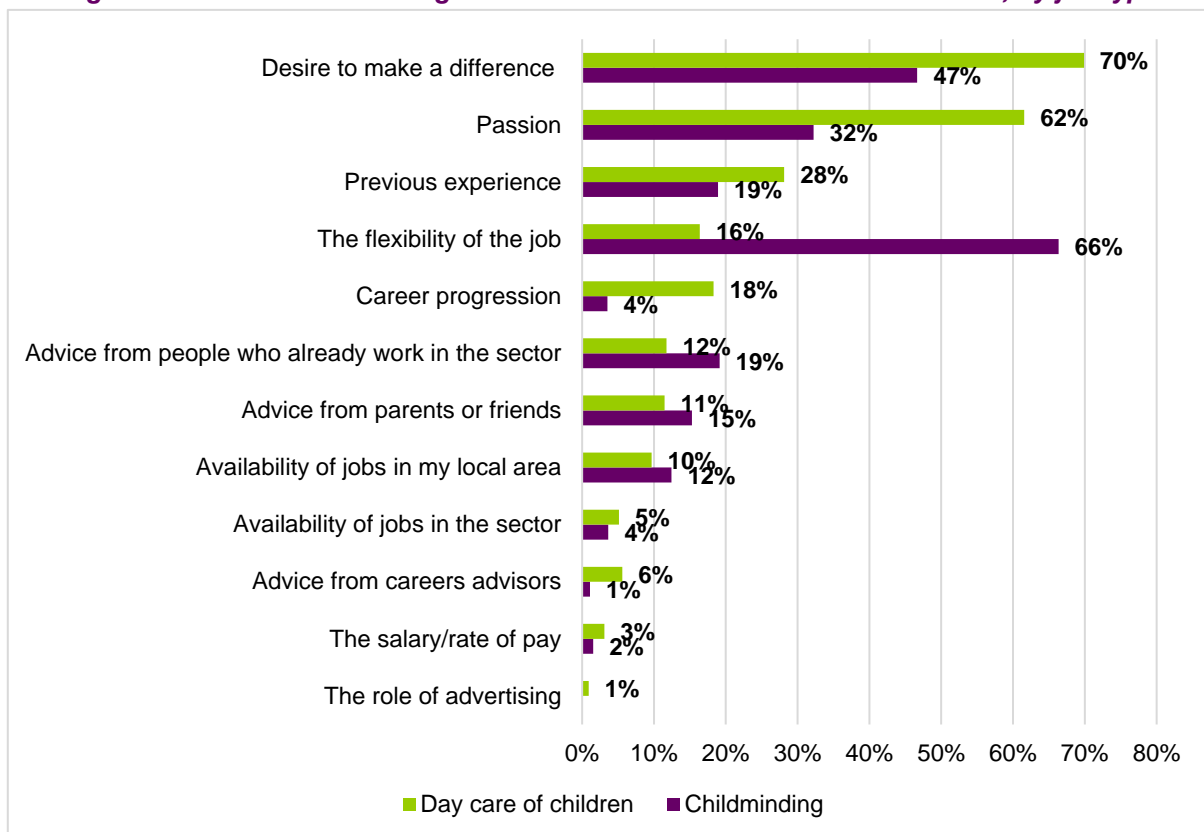
2 Perceptions of Working in Early Learning and Childcare

2.1 In this section we look at what influences and motivates people to join the ELC workforce. It is clear from the research that there are a range of factors that influence people's decision to undertake a career in either DCC services or childminding. The most significant factors for DCC workers are making a difference to children's lives, and a passion for the profession, as illustrated in Figure 2.1. This demonstrates the importance to people in this workforce of having a sense that they are undertaking a worthwhile job. It is a useful message to communicate to potential recruits and also, to encourage people to remain in the workforce and progress their career. The point is reinforced by some of the comments made by employees around what could be done to motivate people to join the workforce, including the following:

"Childcare is a vocation not just a job, you need passion, and to know that [it is] a privilege to be part of [a] child's life" (public sector, DCC employee)

"...I feel it's a hard job (but extremely rewarding) and one that you really have to do because you love children and making a difference to them" (public sector, DCC employee)

Figure 2.1: Factors influencing the decision to choose a social care career, by job type



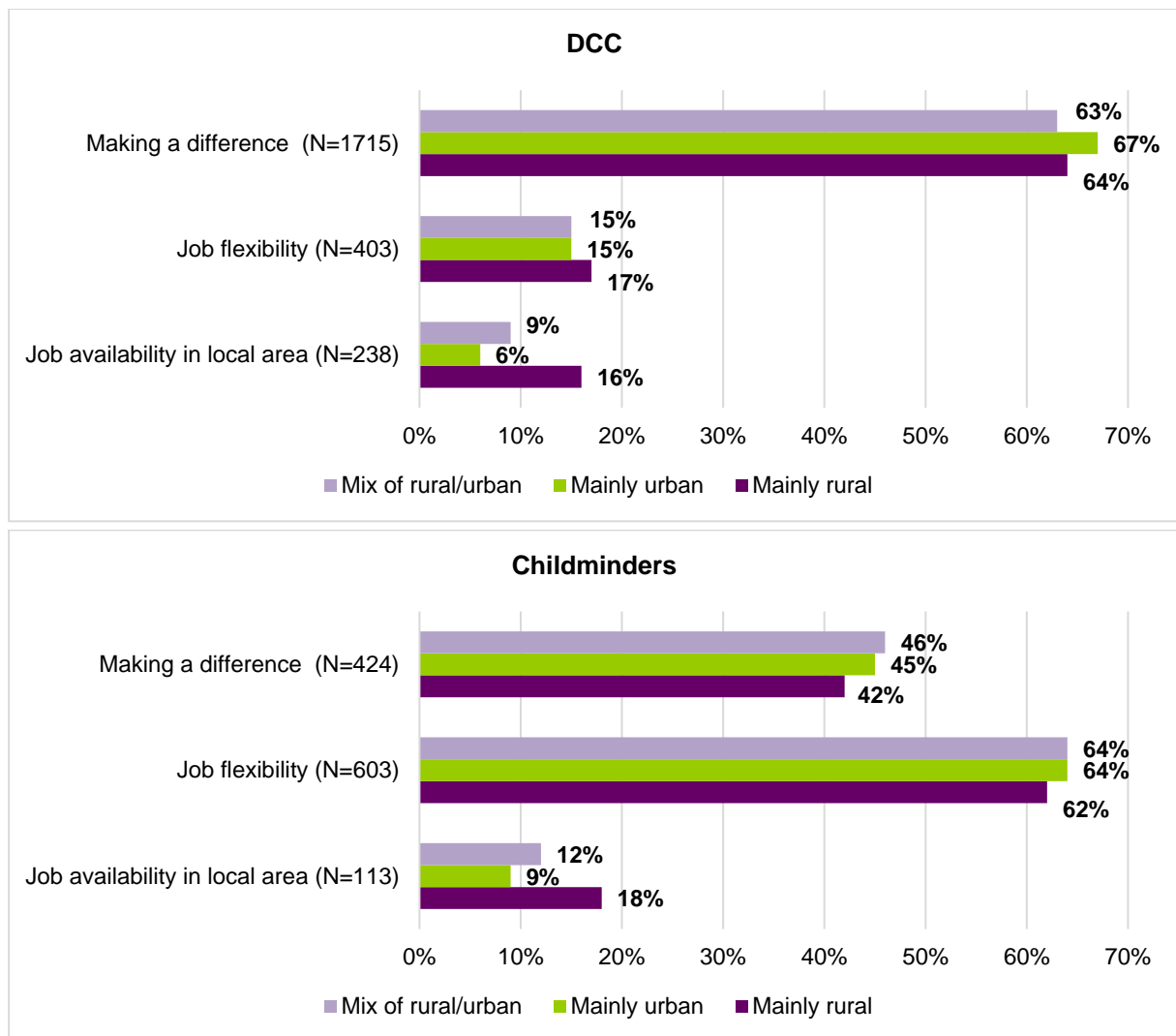
Source: ekosgen employee survey (DCC N=2,520, Childminding N=909)

2.2 The flexibility of the work was rated most highly as an influencing factor by childminders (66% compared to 16% of DCC staff) perhaps unsurprisingly given that childminders are overwhelmingly self-employed and can to an extent determine their own working hours and patterns. Again, the availability of jobs in rural areas was rated more highly by childminders living in rural areas.

2.3 There is also a marked difference between DCC workers and childminders in terms of career progression as an influencing factor. Career progression is not a significant motivator, but is more of an influence for people in DCC services than for childminders. Not surprising, given that childminders as self-employed people largely working on their own have, by definition, little scope for career progression within their role.

2.4 The type of area that employees live in can have an impact on their reasons for joining the workforce. As Figure 2.2 shows, whilst people providing DCC services are primarily motivated by doing a job that makes a difference to children’s lives, those living in mainly rural areas are more likely to be influenced by the availability of employment opportunities in their local area. This probably reflects more limited job opportunities in more rural areas.

Figure 2.2: Influencing factors by area type

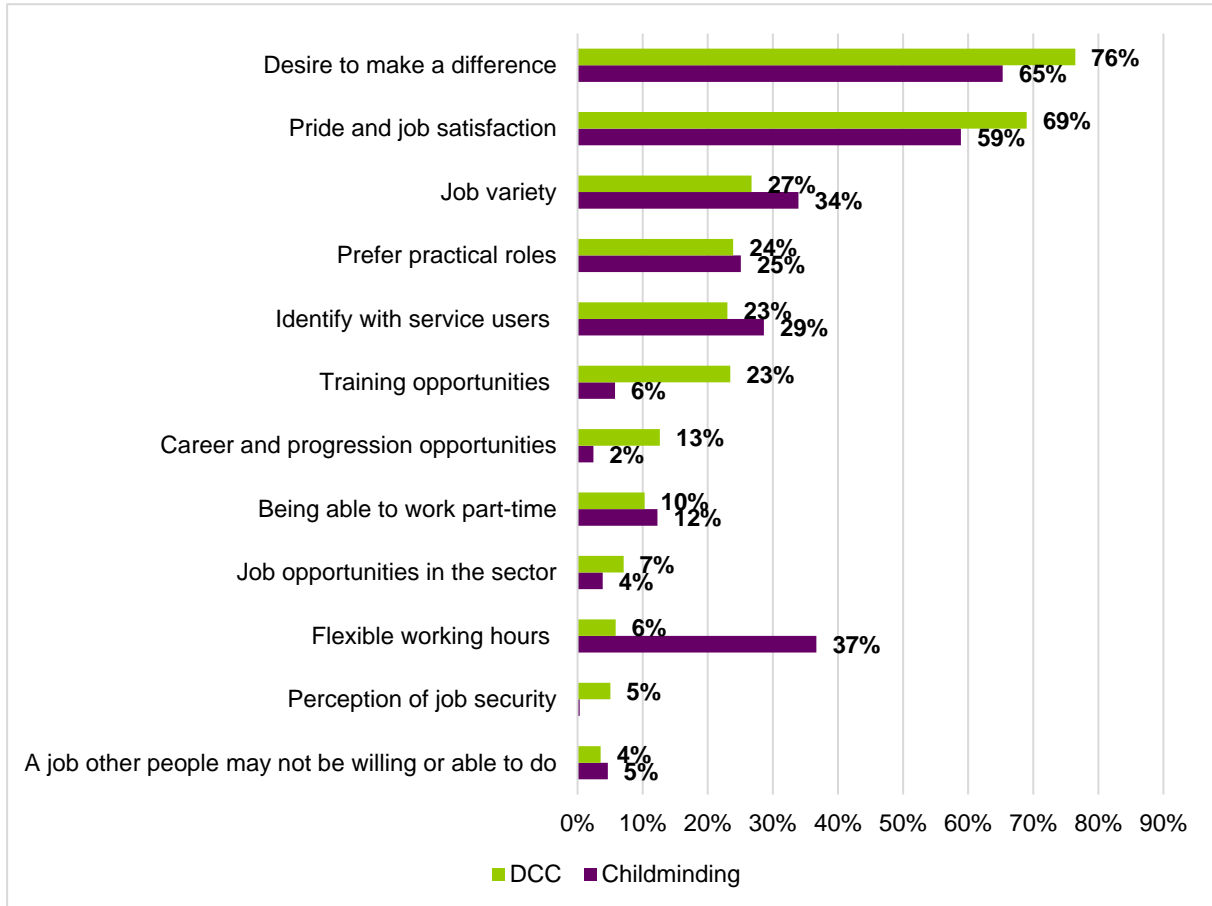


Source: ekosgen employee survey DCC N=2,458, Childminders N=874

2.5 As well as looking at what influences choice, the research explored the main drivers that encourage people to join the workforce. In line with the influences, the majority of both DCC workers and childminders are motivated by a sense of job satisfaction and by a desire to make a difference to children’s lives as illustrated in Figure 2.3. However, another important motivator for childminders (reflecting the influencing factors) is the flexibility of the job.

2.6 The content of the job is viewed as being attractive to those thinking about joining the workforce, with 34% of childminders and 27% of DCC workers identifying the job variety as a motivating factor, whilst both groups perceived the practical nature of the job as being significant (25% of childminders and 24% of DCC staff).

Figure 2.3: Motivations for joining the workforce, DCC and Childminding Services



Source: ekosgen employee survey (DCC N=2,515, Childminders N=905)

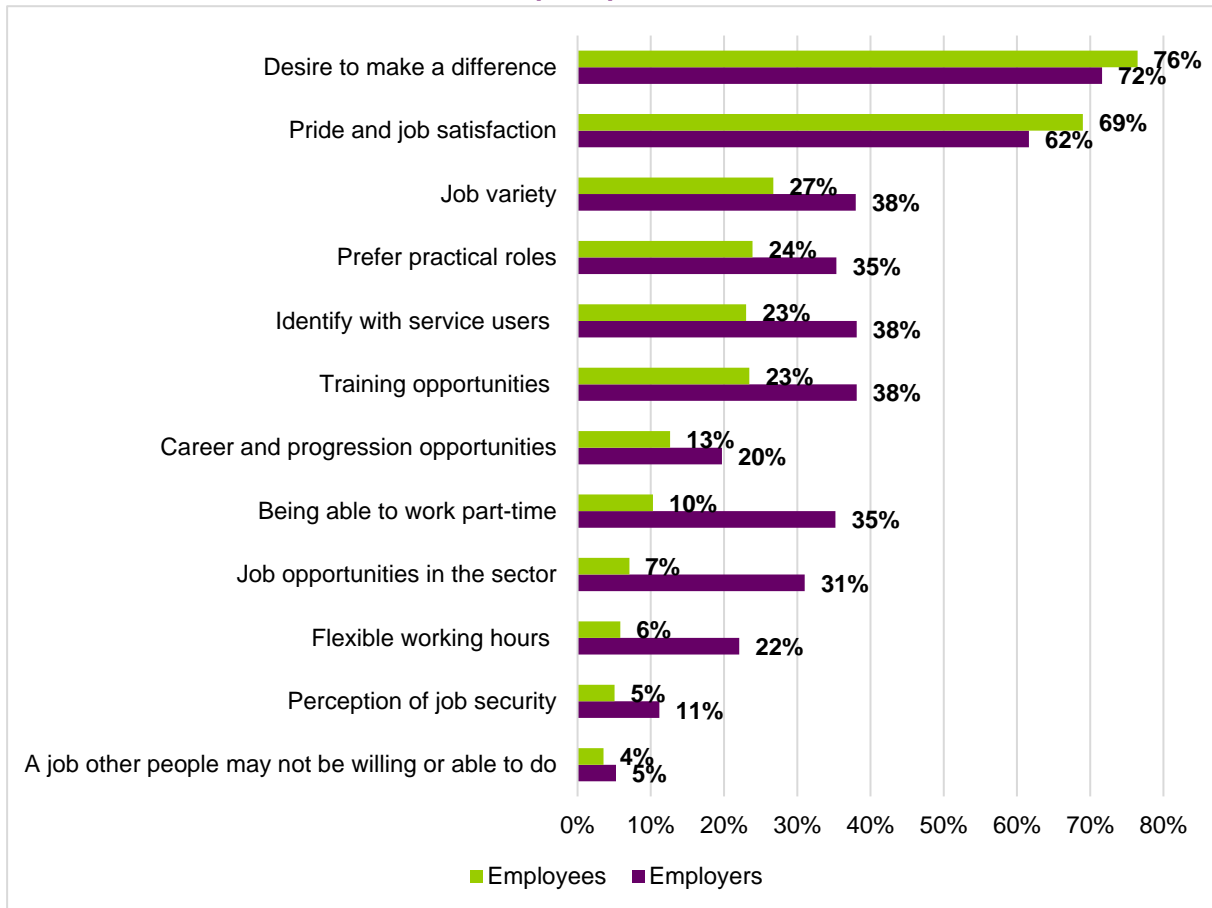
2.7 Training opportunities are perceived as being a considerably more important motivating factor for DCC workers (23%) compared to childminders (6%). It can be difficult for childminders to participate in training during normal working hours, as they need to provide cover and continuity of care. The following comment around what could be done to encourage people to remain in the workforce illustrates this point:

*“More distance learning courses that can be flexible [and] achievable at home...training courses that can be delivered over the Internet [would] help to cut travel hours lost”
(childminder urban area)*

2.8 The reasons for joining the DCC workforce were markedly different when the responses of DCC employees and employers were compared. As Figure 2.4 shows, DCC employers are more likely to report a broader range of motivating factors than employees. Employers were more likely to report training, and career progression prospects (38% and 20% respectively) as motivating factors to working in DCC than employees (23% and 13%). This may point to a lack of awareness amongst DCC employees of the opportunities, or an over-optimistic view on the part of the employers. This is particularly notable when considering part-time working – over a third (35%) of employers viewed the

ability to work on a part-time basis as a motivation for joining the workforce, compared to only 10% of employees. Either way, there is a clear mis-match, which is an important consideration in future workforce planning and development.

Figure 2.4: Motivations for joining the workforce, comparison of DCC employee and employer perceptions



Source: *ekosgen employee survey (N=2,515) and employer survey (N=761)*

2.9 Again, the content of the job is perceived to be attractive to potential recruits to the workforce. More employers (38%) than employees (27%) identified that job variety is a motivating factor, and that the practical nature of the job was important (35% of employers compared to 24% of employees).

2.10 Interestingly, the perceptions of DCC employees about working hours as a motivating factor for joining the workforce vary from employer perceptions. Part-time working hours and flexibility are perceived as more important motivating factors by employers (35% and 22% respectively) than employee views (10% and 6%). It is possibly concerning that job opportunities in DCC are not considered to be a significant motivating factor by employees compared to employers, and is potentially down to a lack of awareness of jobs available in the wider sector.

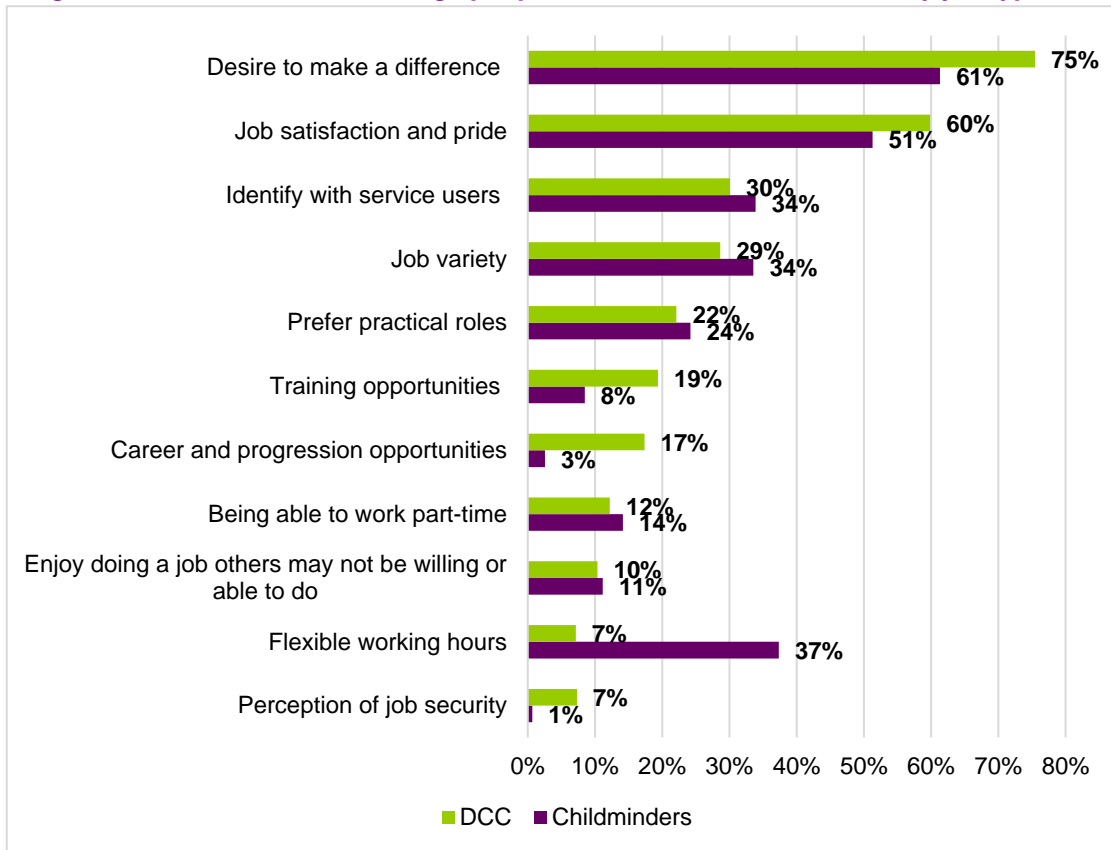
Workforce retention

2.11 The research explored the reasons why, once people entered the workforce, they choose to remain. As Figure 2.5 illustrates, these factors largely mirror the reasons for joining in the first place.

2.12 The flexibility of the work was rated most highly as a motivator by childminders at 37% – perhaps unsurprisingly given that childminders are overwhelmingly self-employed and can determine their own

working hours and patterns. Given the slightly younger and predominantly female profile of the ELC workforce²², it may suggest that working part time appeals to ELC staff so that they can balance other commitments including caring responsibilities. Childminders are also more likely than DCC staff to rate the ability to work part-time as appealing.

Figure 2.5: Factors that encourage people to remain in the workforce by job type



Source: ekosgen employee survey (DCC N=2,501, Childminders N=897)

2.13 In addition to the flexibility of the job, the key variations between the two services are around career and progression and training opportunities. Childminders are less likely to rate these factors as drivers to stay in the workforce which probably reflects the fact that career progression is less likely to be a consideration as they are largely self-employed. It can also be difficult for childminders to attend and fit training around their working hours. The importance of training in the sector was highlighted by the following comments around what could be done to ensure a high quality and sustainable workforce:

“More training offered and opportunities for leadership to encourage staff to embrace change” (public sector, DCC employee)

“People joining the workforce should have undergone robust and effective training over an ample amount of time so they have a true understanding of the job.....continuous training opportunities throughout career....[should be available]” (public sector, DCC employee)

2.14 As Figure 2.6 illustrates, whilst career and progression opportunities are not viewed as a significant driver for DCC staff to remain in the workforce, independent and public sector employees

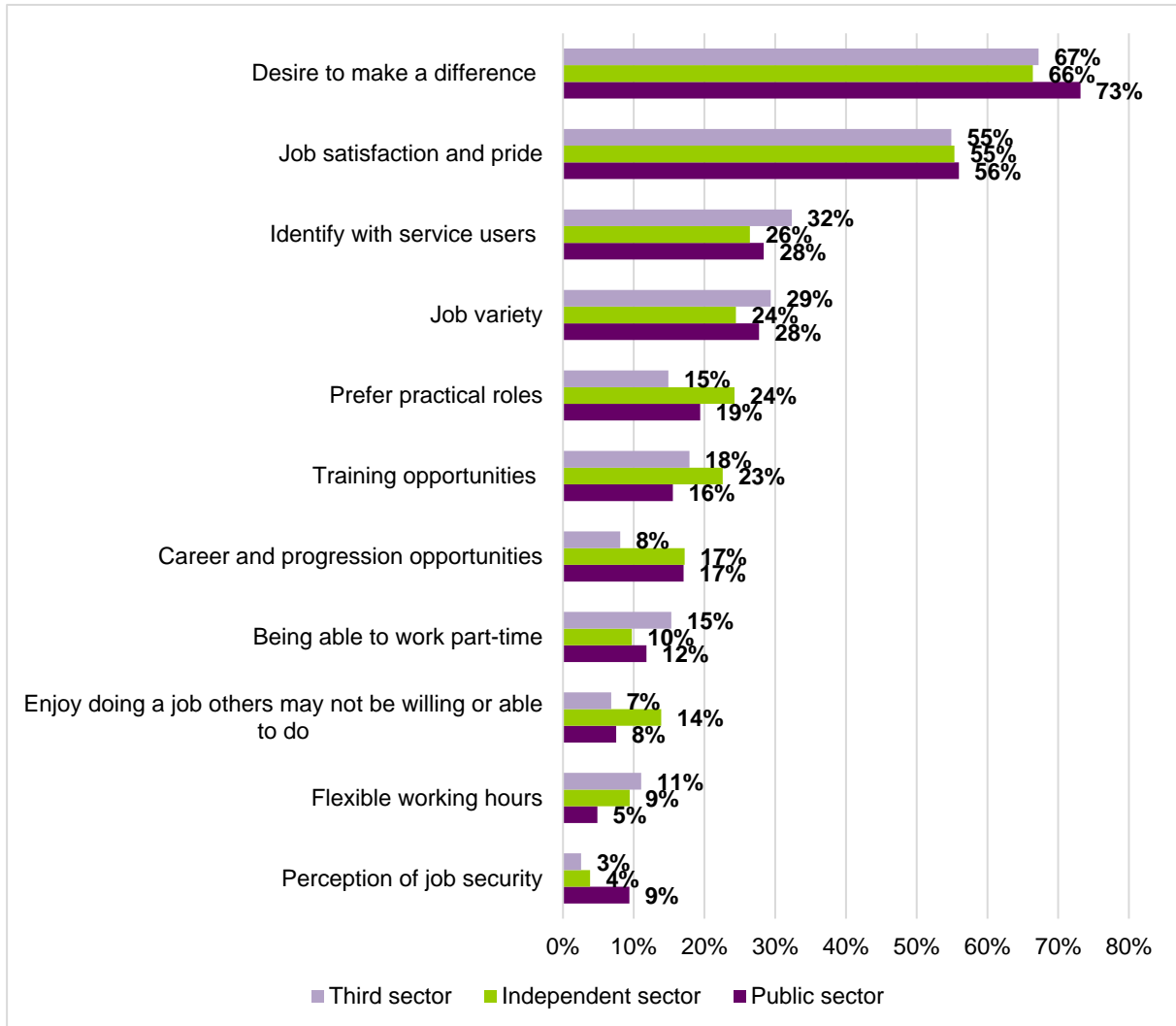
²² Nearly a third (31%) of survey respondents working in children’s social care service roles were aged 34 or under, compared to 21% of those working in adult social care service roles.

rate career progression more highly as a motivator (both 17%) than those working in the third sector (8%). In the case of public sector employers, this is likely to be due to them being significantly larger than other service types, with more opportunities for career progression and more varied job roles which in turn may attract those most interested in career opportunities. This could also explain the variation in perception of job security (9% for public sector, compared to 4% for independent and 3% for third sector employees). Interestingly, training opportunities appear to be a greater motivating factor for staying in the DCC workforce for people working in the independent sector. However, this does not necessarily translate into the independent sector having a more highly trained workforce as the following comment illustrates:

“Often it feels like private providers are constantly training new staff who later opt for L/A [local authority] positions” (independent sector, DCC employee)

2.15 There are other variants among responses by different service types. The working conditions are viewed more positively by those working for third sector DCC providers. Eleven per cent of third sector employees were motivated by flexible working hours, compared to 9% of independent sector and 5% of public sector employees.

Figure 2.6: Motivations for DCC staying in the workforce by service type



Source: *ekosgen employee survey (Third sector N=235, Independent sector N=965, Public sector N=1,501)*

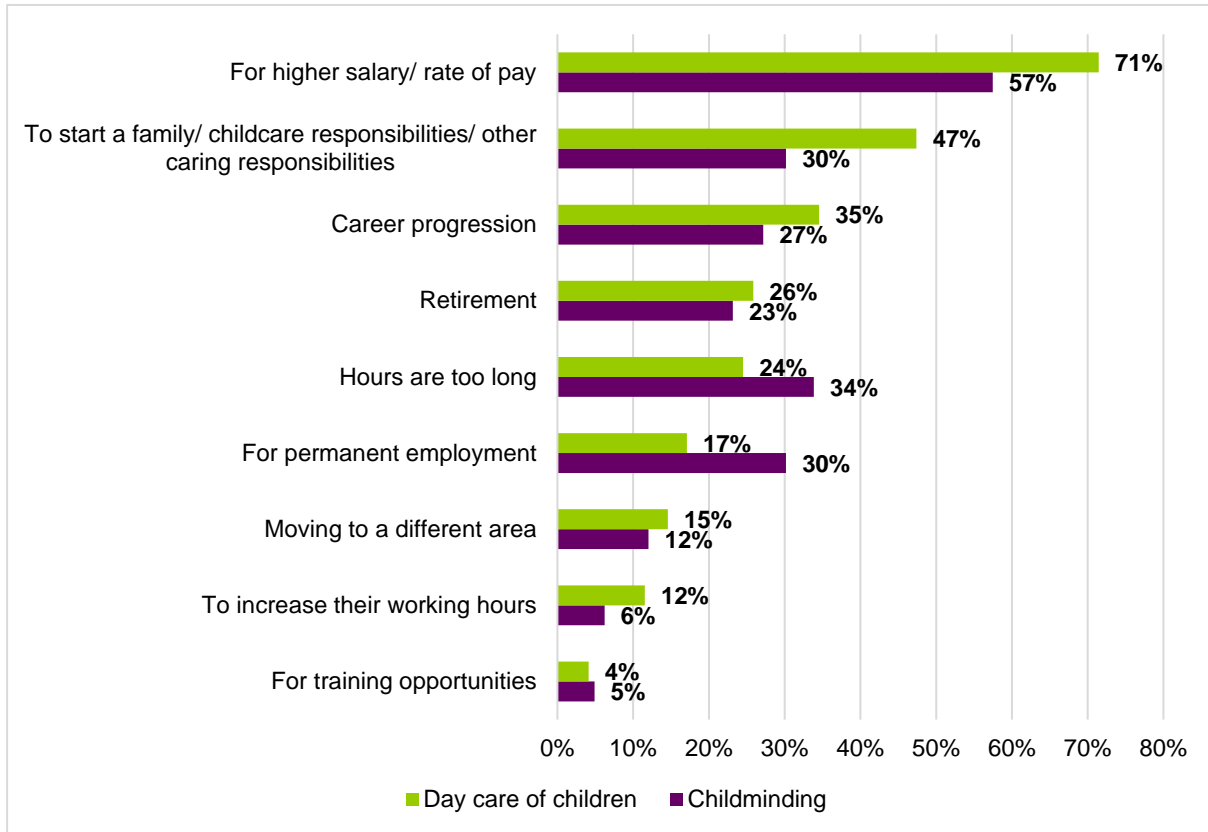
Reasons for leaving the workforce

2.16 Figure 2.7 sets out the reasons why people leave the DCC workforce and compares this to childminders. Whilst the motivations vary, the main reason is to enhance their income – particularly in the case of DCC workers. The long working hours and desire for permanent employment are greater motivators for childminders (34% and 30% respectively) than DCC workers (24% and 17%), reflecting their largely self-employed status, whilst 35% of DCC workers feel people leave the sector to progress their careers.

2.17 Recent research from Carers UK suggests that one in seven of the UK workforce care for a dependent, and that almost half a million people in the UK have left their job in the last two years to do so²³. Whilst the pay levels in ELC may make it difficult for some to work in the sector and pay for care (for example, childcare) the expansion of ELC may help to address some of these challenges.

²³ Juggling Work and Unpaid Care: A growing issue – Carers UK (2019) http://www.carersuk.org/images/News_and_campaigns/Juggling_work_and_unpaid_care_report_final_0119_WEB.pdf

Figure 2.7: Reasons for leaving the workforce, comparison of DCC and childminding services



Source: *ekosgen employee survey (DCC N=2,498, Childminders N=888)*

2.18 As well as discouraging people from joining the ELC workforce the perception of limited career progression opportunities can mean that employees are not incentivised to develop their skills as they do not see a clear progression pathway. More than a third (35%) of DCC employees (and 27% of childminders) identified lack of career progression as a reason why people leave the social care workforce. However, there is work being done to change this perception, and increase the awareness of clear career progression routes and opportunities to work in a variety of settings.

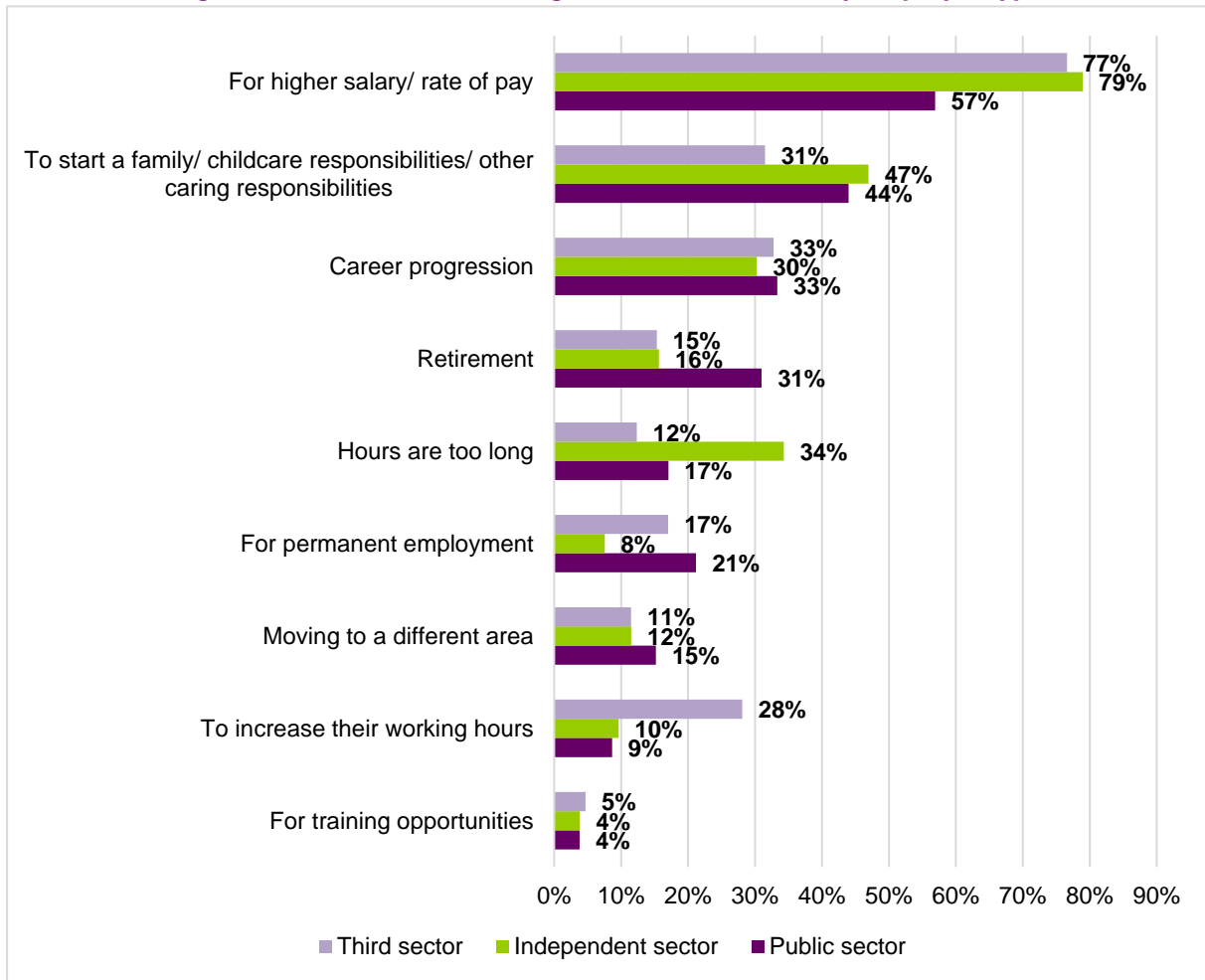
2.19 The high level of movement within the DCC workforce may have an impact on service delivery and continuity of care. Given that over half (54%) of DCC employers surveyed are currently recruiting (with 21% reporting hard to fill vacancies), this might indicate that DCC employers are struggling to find, recruit and retain suitable people to the sector. It is likely that the expansion of funded ELC will be driving a great deal of the vacancies.

2.20 Figure 2.8 shows that whilst the main reason for DCC staff leaving the workforce relates to income, this varies markedly by service type. Independent (79%) and third (77%) sector DCC employees are far more likely to leave for a higher rate of pay than those working in the public sector (57%). The differentials in pay and conditions mean that DCC staff tend to move from independent and third sector employers to the public sector. This evidence supports previous research that shows that levels of pay in the social care sector is the main reason why employers can face challenges in recruiting and retaining key workers.²⁴ It can also work against developing a more diversified workforce. The following comment from an employer highlights this issue:

²⁴ Implementing the Scottish Living Wage in adult social care: An evaluation of the experiences of social care partners, and usefulness of Joint Guidance – CCPS (November 2018) <http://www.ccpscotland.org/wp-content/uploads/2018/11/Univ-of-Strathclyde-Living-Wage-implementation-research-November-2018.pdf>

“We can't compete with the holidays and pay that local authorities can offer....leaves the private sector with a young workforce [with] not a varied range of experience” (DCC employer)

Figure 2.8: Reasons for leaving the DCC workforce, by employer type



Source: ekosgen employee survey (N=2,498)

2.21 There were a number of comments made relating to the perceived pay disparity between service types from both independent and third sector DCC employees:

“Private sector work [is] just as hard as council nurseries I think we should all be given the same money for each partnership child and staff paid the same” (independent sector, DCC employee)

“Working in voluntary sector as a Partner centre with Highland Council but don't get same pay or conditions as Highland Council staff but do [the] same work” (third sector, DCC employee)

2.22 Lack of career progression is another factor that is rated as a key reason for leaving by DCC employees, illustrated in the following comments:

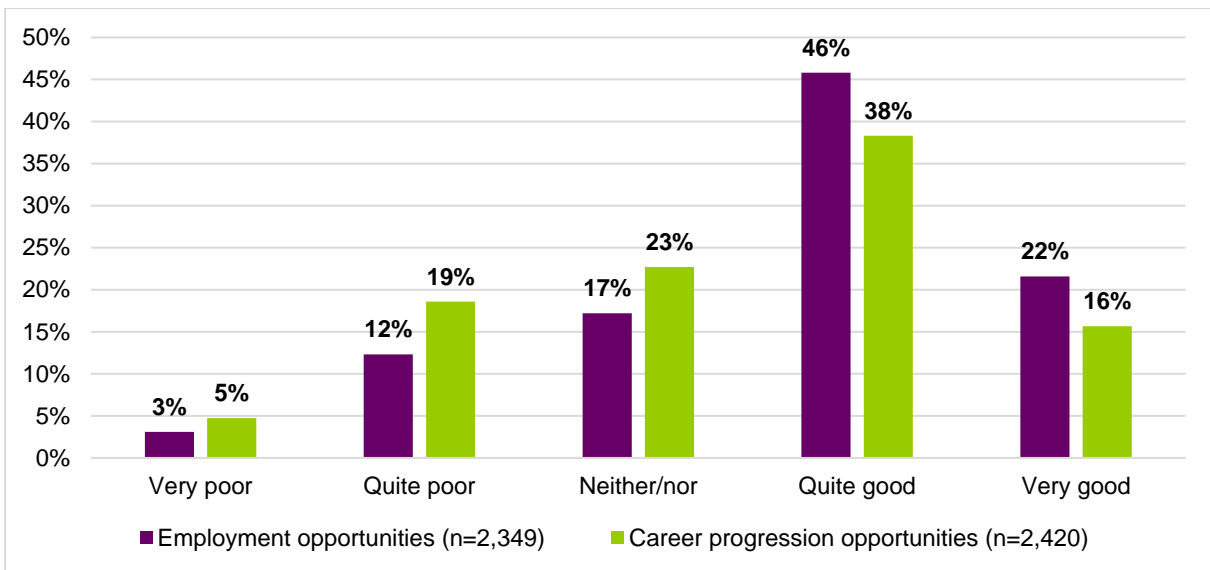
“Giving existing employees more opportunities to progress their skills and careers [is crucial]” (public sector, DCC employee)

"[It is important to] give staff an opportunity for in-house promotion" (independent sector DCC employee)

2.23

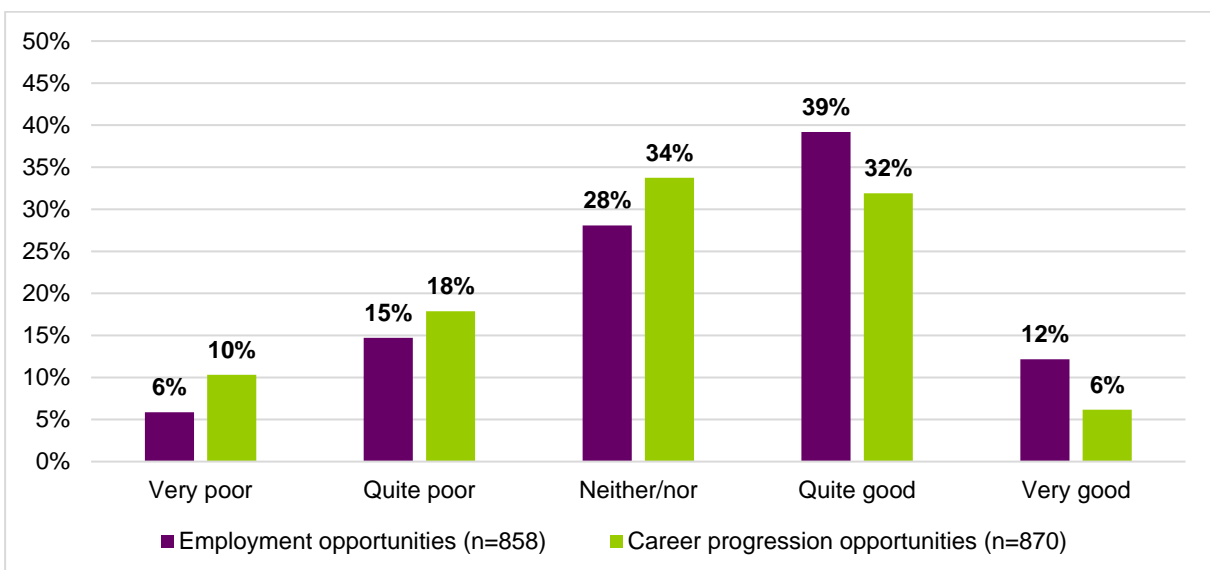
2.24 Figures 2.9 and 2.10 demonstrate that whilst there are perceived to be good job opportunities for working in DCC, the perception of career progression opportunities are less positive. Childminders appear to be a lot less positive about the employment and career progression opportunities in their local area (rated positively by 51% and 38% of childminders respectively, compared to 68% and 54% of DCC employees). This is perhaps to be expected, given that childminders work independently so would have to actively seek out – rather than having direct access to – such information in the same way that might be expected for ELC or DCC staff.

Figure 2.9: Local employment and career progression opportunities – DCC employees



Source: ekosgen employee survey Employment Opportunities N=2,349, Career Progression Opportunities N=2,420

Figure 2.10: Local employment and career progression opportunities – childminders



Source: ekosgen employee survey Employment Opportunities N=858, Career Progression Opportunities N=870

3 Recruitment and Retention

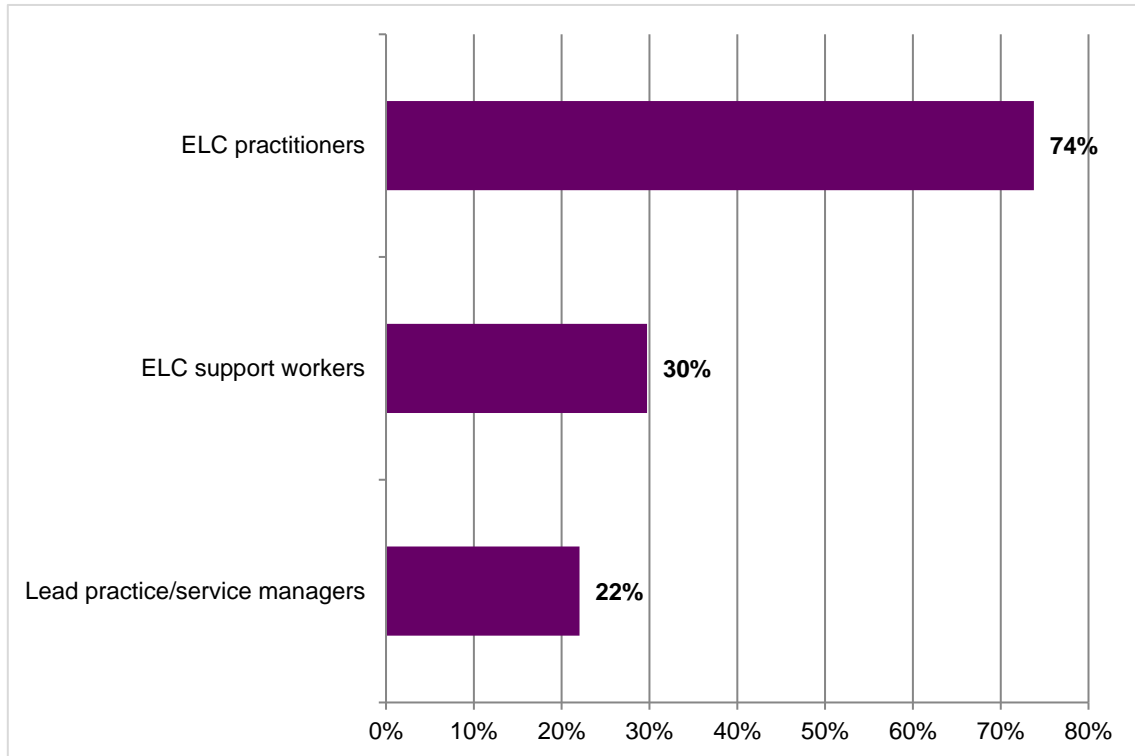
3.1 This chapter examines recruitment and retention issues facing the DCC and childminding workforce. It considers, in particular, the skills issues and gaps and recruitment and retention challenges facing employers. It also explores their perceptions about the main motivations behind people's decisions to join, stay in or leave the sector, and reasons for the existence of vacancies and difficulties in filling vacancies. The evidence set out in this chapter is drawn largely from the employer survey responses and consultations.

Current recruitment needs and challenges

3.2 Many employers are preparing for the expansion of ELC entitlement and face new recruitment challenges in addition to the pressure of trying to fill existing vacancies. ELC employers reported that it is difficult to fill vacancies because the flow of people into social care does not meet their needs, and this is particularly acute in the most remote parts of Scotland.

3.3 Over a third (37%) of DCC employers are currently recruiting. This is significantly higher for independent sector employers (47%) than those in the public (33%) and third (30%) sectors. Also, employers in mainly urban areas are more likely to be recruiting than those based in more rural or mixed areas. The roles currently being recruited for tend to be mostly ELC practitioners, driven by the expansion of funded ELC, with support workers and care staff also in demand, as shown at Figure 3.1.

3.4 There are significant differences by type of employer, with public and independent sector employers being more likely to be recruiting ELC practitioners than those in the third sector, reflecting the employer make-up of the DCC sector. Similarly, there are recruitment variations by geographical coverage, with those seeking ELC practitioner skills being much more likely to be working in mainly urban or rural areas, rather than a mixture of both.

Figure 3.1: Roles currently being recruited for

Source: ekosgen employer survey, n=286, multiple responses allowed

3.5 One fifth (21%) of DCC employers currently have hard-to-fill vacancies²⁵. Again, this is significantly higher in the independent sector (58% of employers) when compared to employers in the public and third sectors (24% and 16% respectively). As context, a recent CIPD Labour Market Outlook report indicates that 37% of UK employers report that they have at least one vacancy that is proving hard to fill²⁶.

3.6 These hard-to-fill posts tend to be for support workers and practitioners and some have been lying vacant for a long time, as demonstrated by the following quotes:

"I have two support roles for pupils with additional support needs... I have been trying to recruit this since February 2018 – I have advertised six times and have offered it four times... we are currently using bank staff" (public sector, urban DCC employer)

"Practitioner, senior practitioner and manager roles have been difficult to fill. I have been actively recruiting for a deputy manager for 2 years without filling the post" (independent sector, urban DCC employer)

Future recruitment needs and challenges

3.7 Just over half (52%) of DCC employers anticipate facing challenges in recruiting new staff over the next 12 months. This is shown by the red line in Figure 3.2. This varies substantially by type of employer, with independent sector employers much more likely to expect recruitment challenges in the next year (66%) than their third or public sector counterparts (50% and 37% respectively).

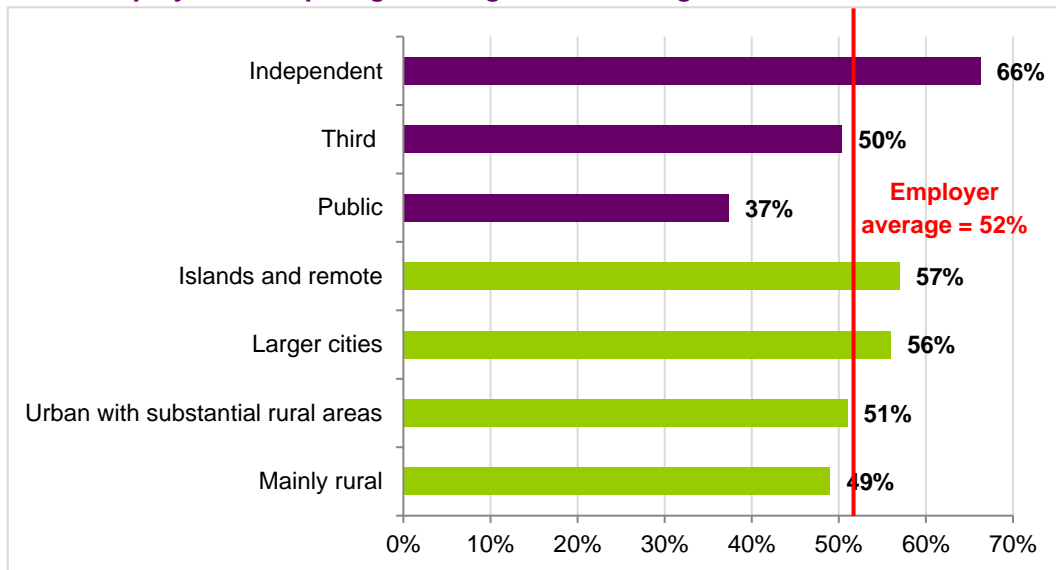
²⁵ Hard-to-fill vacancies are defined as vacancies that have been open for three months or longer.

²⁶ Labour Market Outlook: Views From Employers – CIPD (Summer 2019) https://www.cipd.co.uk/Images/labour-market-outlook-summer-2019_tcm18-62411.pdf

3.8 Interestingly, the responses also vary by geography, with those in the most remote areas being almost equally likely to face recruitment challenges in the future as those in large urban areas. Whilst rural employers may face a lack of applicants, those in more populated areas are more likely to face competition from other employer types (e.g. public sector) and other sectors (e.g. health and education). The following comment from a public sector employer based in a large city illustrates that not all employers face recruitment challenges, but acknowledges that other employers may experience problems as a consequence:

“Have always had applicants for jobs advertised - however it usually creates a vacancy at another establishment in the city” (public sector, DCC employer)

Figure 3.2: Employers anticipating challenges in recruiting new staff over the next 12 months



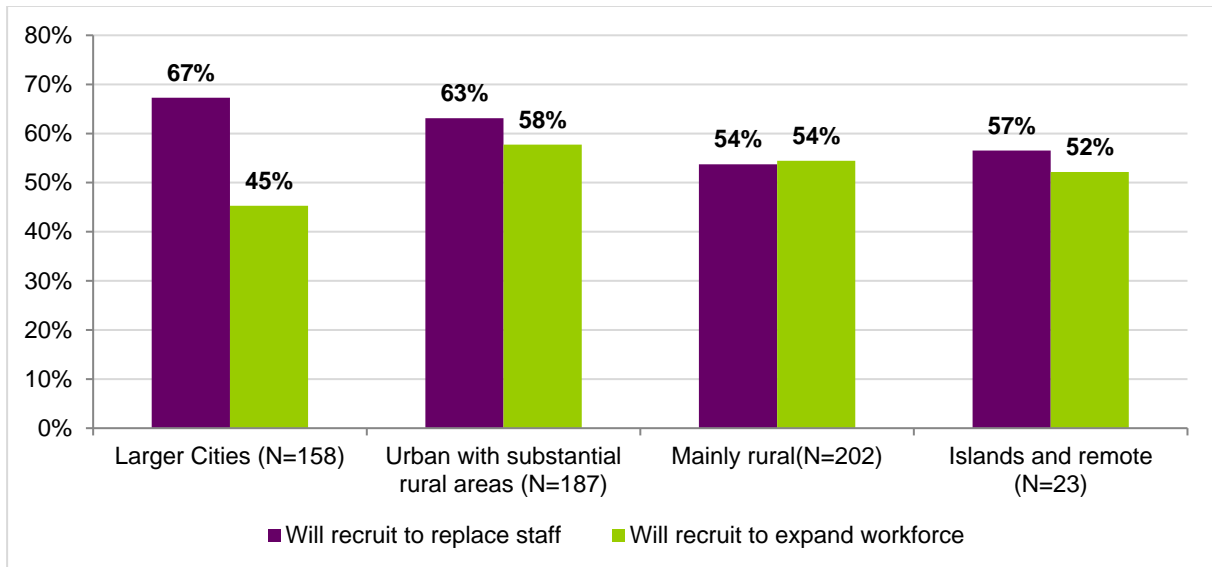
Source: ekosgen employer survey (N=317)

3.9 The need to *replace* staff is higher amongst employers in more urban areas, as shown at Figure 3.3. Plans to *expand* or replace staff are generally more in line in more rural areas. However at 58% a higher proportion of employers in urban with substantial rural areas²⁷ report that they will recruit to expand their staff complement than the corresponding proportion in larger cities.

3.10 Independent sector employers are much more likely to recruit staff over the next year to replace those leaving (50% vs 30% for public sector employers and 19% for third sector employers). This may be due to the well-documented trend of DCC workers moving from independent to public sector employers for improved hours and benefits. Both public and independent sector employers plan to recruit to expand their workforce (41% and 40% respectively) compared to only 17% of third sector employers. This is likely to be as a result of the expansion of funded ELC.

²⁷ Classed as local authority areas with a population of more than 50% living in urban and other urban areas

Figure 3.3: DCC employer plans to recruit staff in the next 12 months



Source: ekosgen employer survey, Will recruit to replace staff N=581, Will recruit to expand workforce N=581

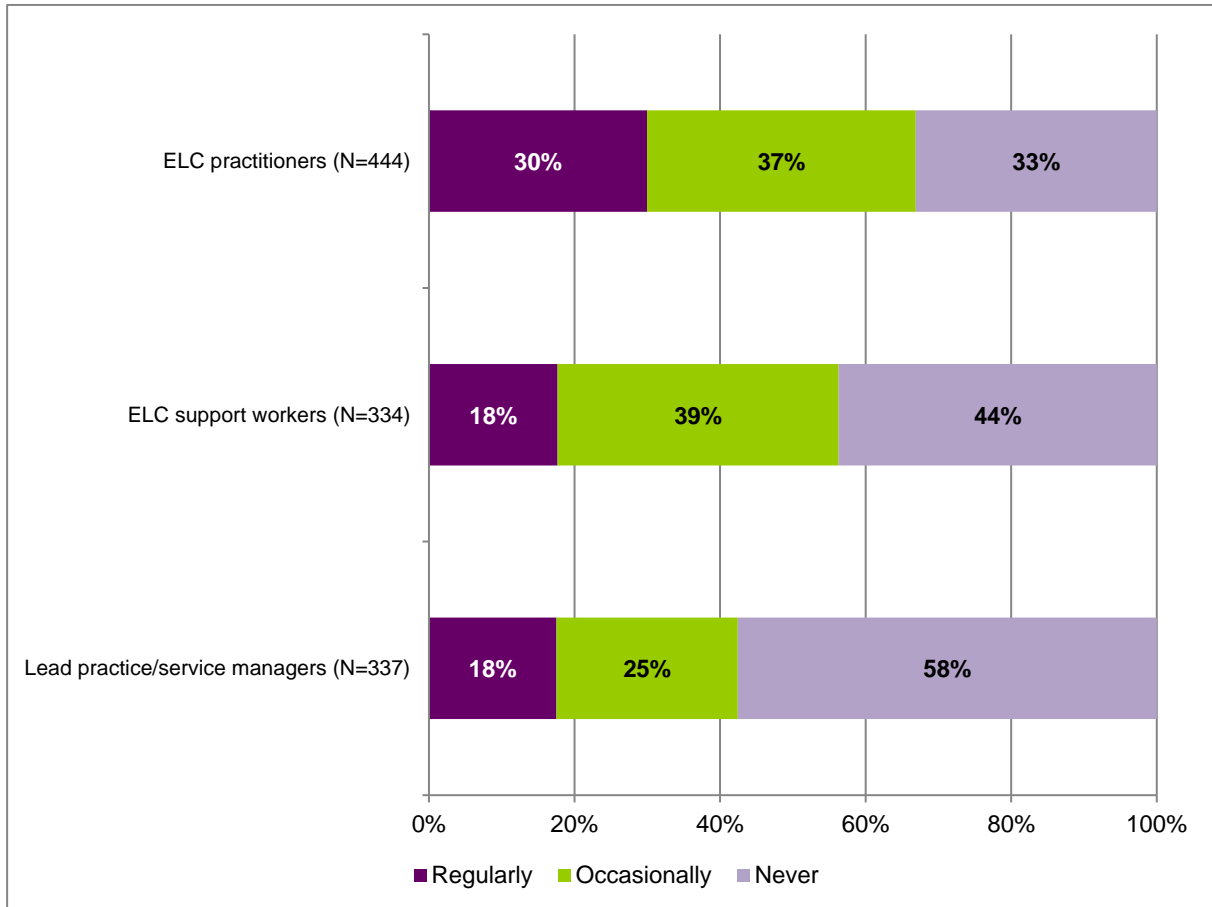
Retention issues

3.11 Employers have experienced difficulties in recruiting ELC practitioners, care staff and support workers. Figure 3.4 sets out how frequently employers have experienced difficulties in retaining different types of staff in the past two years - two thirds of employers (67%) have encountered retention difficulties with ELC practitioners, whilst more than half (57%) have experienced problems retaining support workers.

3.12 Stakeholders articulated a tendency for DCC staff to move from the independent and third sectors to the public sector, and this is a challenge across both urban and rural providers. This is highlighted in the following quotes from employers:

“As a private childcare provider I am losing staff regularly to local authority and can’t compete with the salaries being offered” (independent sector, urban DCC employer)

Figure 3.4: Difficulties in retaining types of staff in the past two years



Source: *ekosgen employer survey N=592*

3.13 The SSSC holds a significant amount of data about the social service workforce as a whole. In order to understand the flow of workers into the sector, between different parts of the sector and the career progression within the sector, they recently published a report which analysed registration data over a 12 month period²⁸. However this analysis did not examine the movement of workers between employer types, such as the public, independent and third sectors. The SSSC intend to consider the movement of staff between these employer types in future reports.

3.14 On the whole, the evidence from this chapter suggests there are large amounts of recruitment occurring in the DCC workforce currently, and that there are challenges when it comes to recruitment and retention of staff. The findings should be seen alongside other key sources such as the SSSC’s Workforce Data Reports and the annual vacancy reports published by the SSSC and Care Inspectorate. These recruitment trends and challenges vary widely depending on employer type and geography, with a greater rate of recruitment and challenges amongst independent sector employers, and those in more urban settings.

²⁸ Between 1 August 2016 and 31 July 2017.

4 Workforce Movement

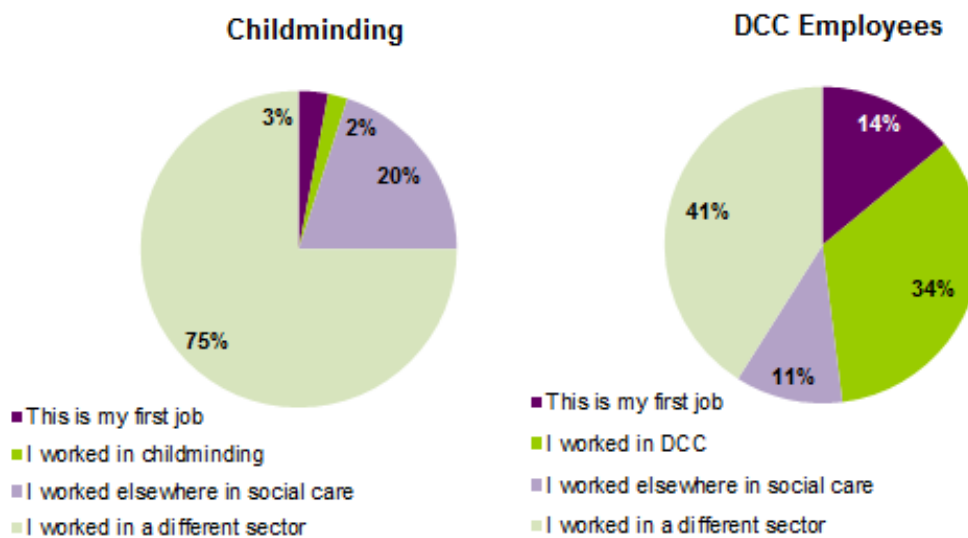
4.1 This chapter considers the extent to which DCC employees and childminders move internally, that is, within the social care workforce and externally, looking at the dynamics of the wider labour market in Scotland. The main report provides commentary on the movement between adult and children’s services. It shows that there is a tendency for people to remain in the same type of service for example adult and children’s although there is a slightly greater propensity for staff to move from adult to children’s than the other way around.

Internal workforce movement

4.2 As Figure 4.1 illustrates, almost half of those (45%) working in DCC had previously had another job in the social care sector before their current job, and most of these had been in DCC (see Figure 4.2). This is compared to less than a quarter of childminders (23%). This suggests that workforce movement is far higher in DCC services, and perhaps reflects the migration of workers from the independent and third sectors to the public sector, although people were not asked in the survey which service type (i.e. public, independent or third) they came from.

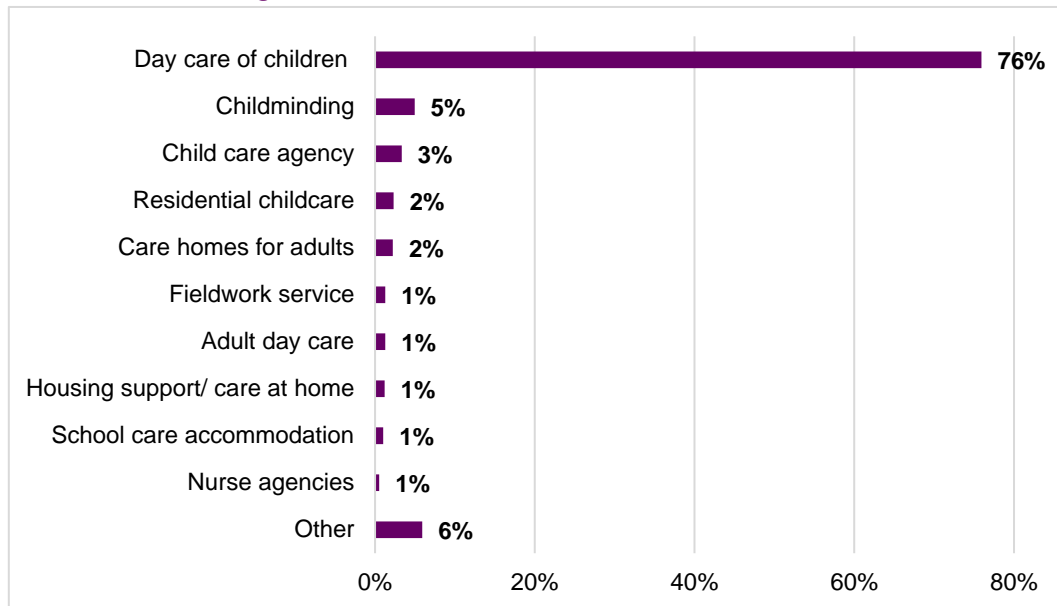
4.3 The proportion of people working in the DCC who were in their first job (14%) is far higher than that of the overall social care workforce (8%), which is not surprising given the relatively young age profile of this group of workers.

Figure 4.1: Previous Occupation



Source: ekosgen employee survey (Childminding N=950, DCC N=2,650)

4.4 The vast majority of people currently working in DCC roles have come from the same sub-sector, as indicated in Figure 4.2.

Figure 4.2: Previous social care role of DCC staff

Source: *ekosgen employee survey, N=1,167*

4.5 There is a trend for experienced ELC staff to move from the independent to public sector which can create retention difficulties for some ELC providers. This of course varies by area and the existing balance between public and independent provision. Of all social care employers surveyed, the majority (90%) reported that when staff leave to move into a role associated with the DCC, they are leaving a similar service. Given that nearly two-thirds of these (65%) are leaving either independent or third sector employment, this movement suggests that employees are not moving to take up different types of roles, but rather are looking for better pay and conditions, or perhaps better job security. It is also worth noting that 5% of staff currently working in DCC roles had previously worked as a childminder which would not have been picked up by the SSSC workforce analysis as the SSSC doesn't register childminders

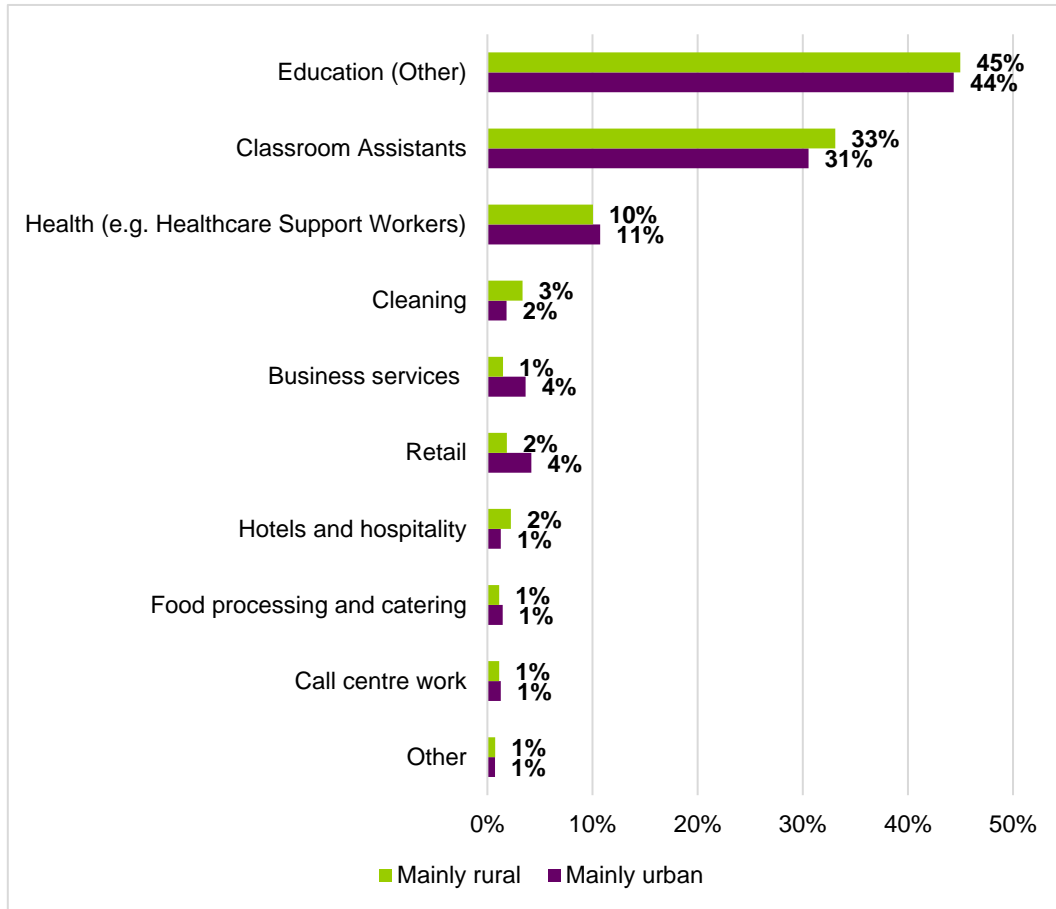
The wider labour market

4.6 DCC employers identified the education and health sectors as being the most likely competition for staff. As Figure 4.3 shows, there is little difference by type of area, with teaching and classroom assistant jobs perceived as being the biggest source of competition for employers (45% and 33% in mainly rural areas compared to 44% and 31% in mainly urban areas), with retail and business services jobs featuring more prominently in urban areas.

4.7 Healthcare related jobs and hotels/hospitality roles were the biggest source of competition for adult and children's services social care employers, particularly in more rural areas. As the role of adult social care in particular is more akin to nursing or other, wider healthcare support roles, the staff in this workforce may be benefitting from improved pay and conditions. Retail and cleaning jobs were also contenders when it comes to recruiting and retaining social care staff in adult and children's services. This is supported by the findings of SSSC research²⁹.

²⁹ Using SSSC registration data to examine workforce movements – SSSC (May 2019)
<https://www.sssc.uk.com/knowledgebase/article/KA-02680/en-us>

Figure 4.3: Employer Perceptions of competing sectors, DCC perceptions



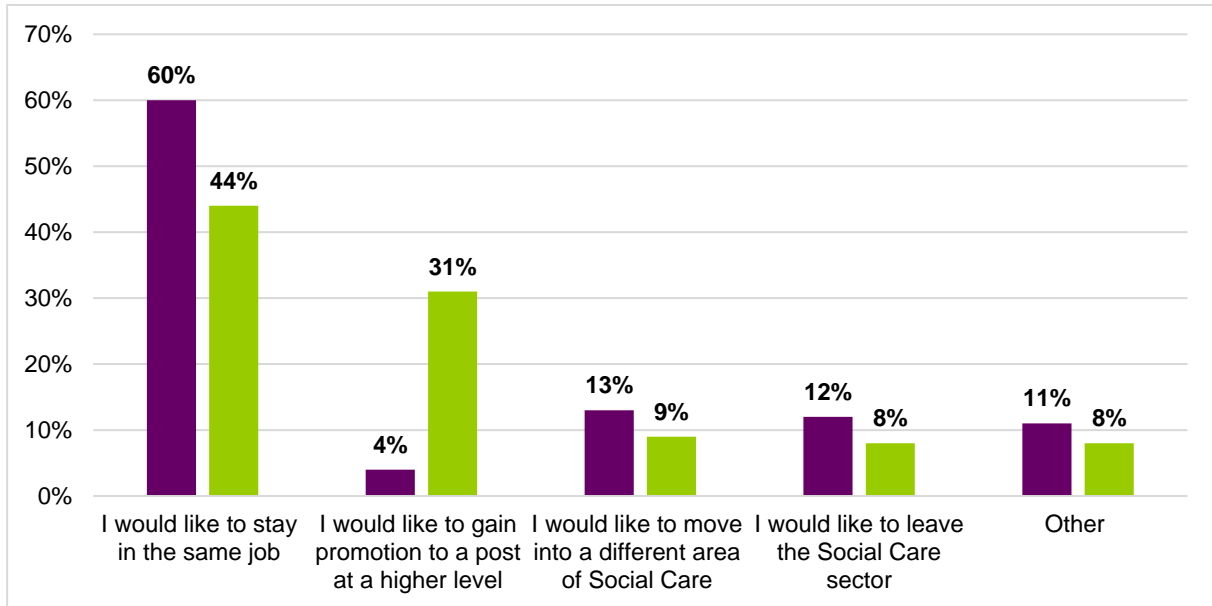
Source: *ekosgen employer survey (Mainly rural N=269, Mainly urban N=550)*

Future ambitions

4.8 In total, 84% of those working in DCC roles and 77% of childminders want to remain working within social care in the future. This is a greater proportion than the equivalent group working in adult and children’s social care service roles (79%). As shown in Figure 4.4, DCC staff are much more inclined to want to gain a promotion than move to a different area of social care, and are also less inclined than childminders to want to leave the sector entirely (8% compared to 12%). Childminders were more likely to want to stay in the same job, which may suggest that they prefer the autonomy and flexibility of the role.

4.9 Future intentions differ little by geography of respondent. The key differences are that those working in more rural areas are more likely to want to stay in the same job in the future. Those working in larger cities are less likely to want to do so, which may reflect the greater access to employment opportunities and career progression felt by those in an urban setting,

Figure 4.4: Future intentions



Source: *ekosgen employee survey (DCC N=2,446, Childminder N=880)*

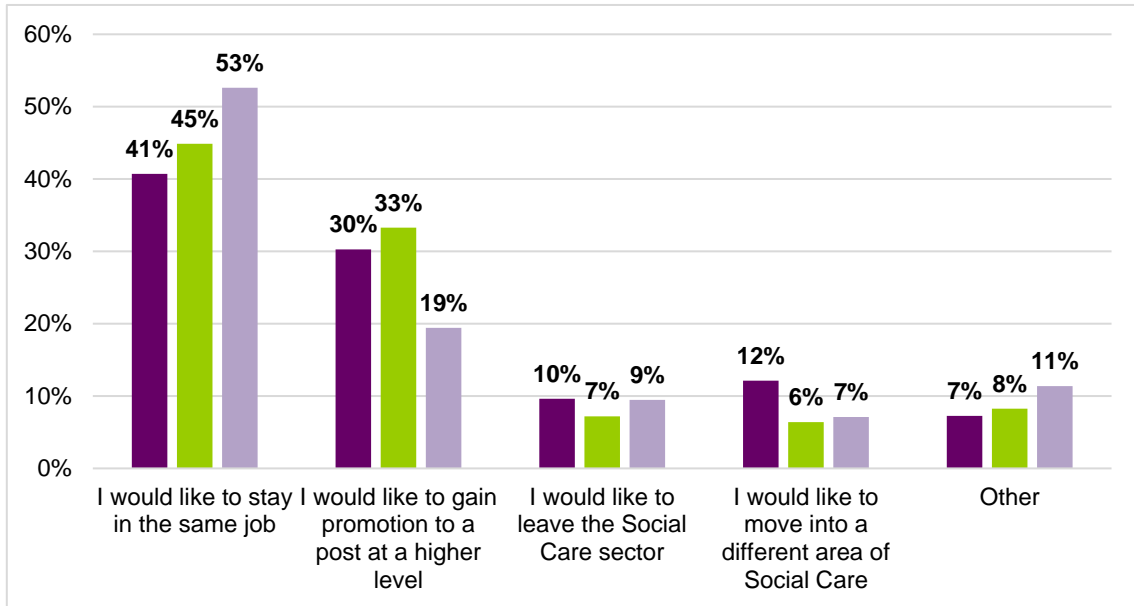
Those who want to stay in the sector

4.10 Of all those DCC employees who indicated that they wanted to stay in the social care sector, the majority (83%) stated that they would rather stay in the DCC³⁰. Of the adult and children’s social care workforces, 79% reported wanting to stay in the sector in the future. This varies a little by previous experience - those who previously worked in a different sector are slightly less likely to want to stay in social care in the future (78%) than those who previously worked elsewhere in social care (80%) and those in their first job (85%). In comparison, those people working in adult social care service roles are less likely to want to stay in the social care sector (78%). This may be partly explained by the fact that those working in adult services tend to be older, on average, and so are more likely to be looking towards retirement.

4.11 As illustrated in Figure 4.5, public sector employees showed the greatest propensity to want to progress in their career to a promoted post (33%, compared to 30% of independent and 19% of third sector employees), possibly reflecting better available opportunities or perhaps better awareness of opportunities. Independent sector employees meanwhile, were most likely to want to leave DCC and move to a different area of social care.

³⁰ Children’s services are classed as the following: adoption services, child care agencies, Childminding Services, DCC, fieldwork service (children), fostering services, residential child care services and school care accommodation.

Figure 4.5: Future ambition of DCC workers, by service type



Source: ekosgen employee survey (Independent N=882, Public = 1,391, Third=211)

4.12 Where ELC staff indicated they would like to move into a different area of social care in the future, the most likely destination was another type of ELC or children’s social care service as illustrated in Table 4.1. Most of the other responses either identified social work roles, or jobs in different sectors (perhaps having misread or misunderstood the question).

Table 4.1: Social care jobs that ELC staff would like to move into

Role	DCC (n=210)	Childminding (n=113)
Day care of children (including ELC)	16%	50%
Fieldwork service (children)	25%	16%
Residential childcare	15%	8%
Fostering services	14%	9%
Adoption services	14%	6%
School care accommodation	10%	12%
Child care agency	10%	9%
Childminding	8%	2%
Housing support/ care at home	5%	6%
Nurse agencies	6%	1%
Personal Assistant	4%	3%
Care homes for adults	2%	6%
Adult day care	2%	4%
Offender accommodation services	4%	0%
Central and strategic staff	3%	2%
Fieldwork service (adults)	3%	1%
Fieldwork service (offenders)	2%	2%
Non-registered commissioned services	1%	2%
Fieldwork service (generic)	1%	1%
Other	21%	16%

Those who want to leave the sector

4.13 Eight per cent of DCC employees would like to leave the workforce in the future (compared to 10% of those working in adult and children’s social care), and for many, this is due to the stress and pressure of their current job, as shown in Figure 4.6.

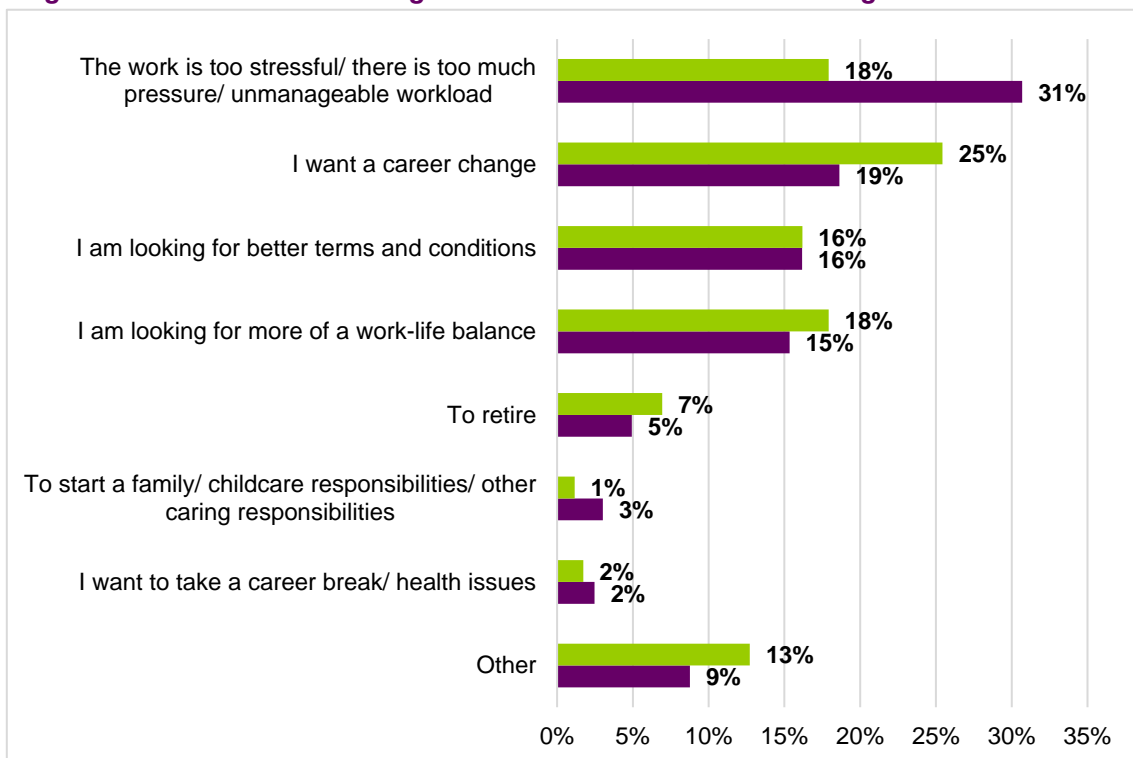
4.14 The following comments from DCC employees further illustrates this issue:

*“Less pressure on staff would allow them to concentrate their time with the children”
(public sector, DCC employee)*

“Social care workers are regarded and treated as babysitters and not as the dedicated hard working people they are many are leaving as the demands and stress of the job along with lack of professional recognition is becoming intolerable” (independent sector, DCC employee)

*“Take care of the mental health (worries, workload, stress, anxiety) of early years practitioners and treat them with the same level of respect/professionalism as teachers”
(public sector, DCC employee)*

Figure 4.6: Reasons for wanting to leave the DCC and Childminding Services workforce

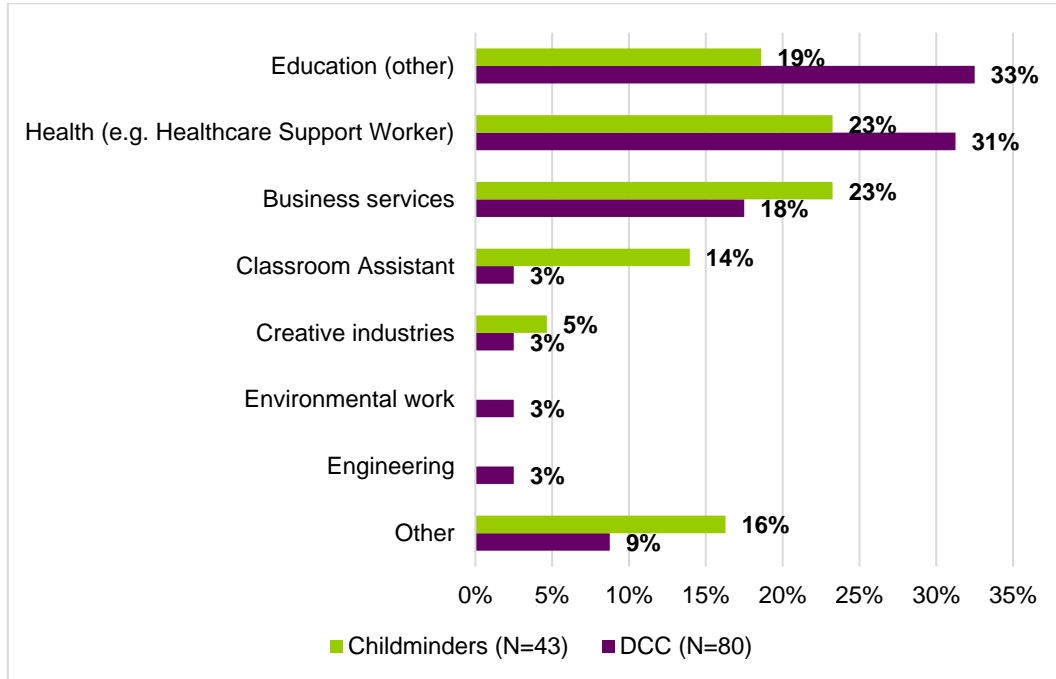


Source: ekosgen employee survey (DCC N=173, Childminders N=365)

4.15 Of those DCC employees who have ambitions to leave the social care sector in the future, they report a wide range of job types of interest. Figure 4.7 illustrates that education, health and business service are the main sectors that attract DCC employees (33%, 31% and 18% respectively) and childminders (19% for education, and 23% for both health and business service jobs), to varying extents. This is perhaps not surprising given the educational component of DCC which provides childcare as well as early learning: ELC staff are still using their skills of working with children, but often have better pay and conditions and more flexible working.

4.16 In addition, a considerable proportion (14%) of childminders indicated that classroom assistant work was a potential job of interest. Of the 'Other' destinations identified, this included a diverse range of jobs including call centre work, working in the beauty industry, and working with animals.

Figure 4.7: Potential destinations of career changers, comparison of DCC and Childminding Services



Source: ekosgen employee survey

5 Conclusions

5.1 The ELC sector is in the process of undergoing major changes and experiencing significant expansion in its workforce. The current DCC workforce profile is predominantly young, white and female, and are mainly working full-time. This lack of workforce diversity has a number of negative impacts, but in workforce planning terms, it limits the pool of potential recruits to support replacement and expansion demand.

5.2 Although there are a range of factors that influence people's decision to pursue a career in both DCC and childminding Services, the research indicates that most people join and stay in the DCC workforce in order to make a difference to children's lives, and because they have a passion for the job. Meanwhile childminders, who are overwhelmingly self-employed, are driven in part by the flexibility of the job.

5.3 The main reason why people leave the DCC and childminding Services relates to income, although third and independent sector employees are the most likely groups to leave for this reason. This creates problems for these employers, who struggle to compete with the pay and working conditions offered by the public sector. Also, given the higher proportion of female DCC workers and childminders, it is unsurprising that the second most significant reason for leaving the workforce is linked to caring responsibilities.

5.4 Employers report a broader range of reasons than employees for joining the DCC workforce, including training opportunities, and factors relating to the working conditions (such as part time working hours and flexibility). These are less commonly reported by DCC staff which may suggest that they are less aware of these opportunities, or that employers perceive these factors to be of more value to the workforce than they actually are.

5.5 A significant proportion of DCC employers are currently recruiting, although this varies by service type and geography. Over the next year, more than half of DCC employers anticipate facing recruitment problems, with challenges facing both urban and rural employers – the former facing competition from other sectors, the latter struggling with a lack of applicants. The workforce is expected to continue to expand and this is likely to put pressure on employers, particularly in the independent and third sectors, and on those based in urban areas. However, in more rural areas, DCC workers are more likely to be influenced by the availability of jobs, reflecting the fact that in rural parts of Scotland, employment opportunities may be more limited than in more urban areas.

5.6 In examining the movement of the workforce both internally and externally, the data shows that there is a greater tendency for DCC workers to move into other DCC roles, rather than move into an adult social care service role. Most of the staff moving internally are leaving either independent or third sector employers, suggesting that rather than taking up different types of roles, they are likely to be looking for better pay and conditions, or job security.

5.7 Encouragingly, people want to stay in the sector, but there are other factors they have to consider, such as higher rates of pay and career progression or caring responsibilities. This raises a number of wider labour market challenges for the sector moving forward: principally, changing the attractiveness of the sector, the gender profile and ensuring staff retention and development. It must be acknowledged that significant efforts are being made to address some of these challenges and improve the working conditions and living standards of front-line staff in the sector³¹. For example, the Scottish

³¹ Implementing the Scottish Living Wage in adult Social Care: An evaluation of the experiences of Social Care partners, and usefulness of Joint Guidance – CCPS (2018)

Government has committed to supporting the implementation of the Real Living Wage for staff delivering funded ELC staff.³²

5.8 Employees who have ambitions to leave the sector have indicated that they are most likely to seek employment in the health and education sectors. This is perhaps to be expected, given that those who have been trained in ELC are likely to move into education to continue to utilise their skills of working with children.

³² Protecting Scotland's Future: the Government's Programme for Scotland 2019-2020 – Scottish Government (September 2019) <https://www.gov.scot/publications/protecting-scotlands-future-governments-programme-scotland-2019-20/>

Appendix A: Training provision for Early Learning and Childcare

Introduction

5.9 There are a range of qualifications which can be undertaken by people in different roles in the ELC sector, as illustrated in Table A1. These have different purposes and are applicable to individuals in different settings and at different levels.

Table A1: Education and training definitions

Education	Definition
College Provision (includes HE provision)	All SCQF level course titles containing any of following keywords: "childhood" "childcare" "children's care"
Modern Apprenticeship	Social Services (Children & Young People) Social Services (Children & Young People) Technical
Foundation Apprenticeship	Social Services (Children & Young People)
Graduate Apprenticeship	Early Learning and Childcare (pilot)
University Provision	University provision was defined using a combination of subject groups as well as specific courses Training teacher-nursery courses and course titles including "child care", "BA Childhood Practice", "Early Years"
Scottish Vocational Qualifications (SVQs)	Providing practical, vocational work-based learning for people already in employment in the sector or are looking to enter it.

College Provision

5.10 Twenty five colleges in Scotland³³ deliver a range of ELC-related learning to employers, existing and prospective ELC staff. Table A2 illustrates that enrolments, full-time equivalents (FTEs) and credits rose sharply between 2014/15 and 2017/18, with a 17% rise in ELC-related enrolments during this period, higher than the overall rise in college enrolments, at 14%.

Table A2: College enrolments, FTEs and credits relating to ELC by college region, 2014/15 – 2017/18

College region	2014/15			2015/16			2016/17			2017/18		
	Enrolments	FTEs ³⁴	Credits	Enrolments	FTEs	Credits	Enrolments	FTEs	Credits	Enrolments	FTEs	Credits
Aberdeen and Aberdeenshire	388	n/a	3,088	428	317	4,373	481	322	4,545	469	287	4,131
Ayrshire	563		7,015	940	598	8,397	779	663	9,051	862	729	10,438
Borders	246		1,296	116	51	756	109	64	924	119	74	1,092
Dumfries & Galloway	231		2,556	180	137	1,858	229	153	2,021	268	205	3,030
Edinburgh	641		6,066	631	422	5,980	657	435	6,234	902	521	7,153
Fife	473		5,328	526	466	6,752	534	477	6,856	646	505	7,437
Forth Valley	251		3,091	286	227	3,281	–	–	–	573	315	4,564
Glasgow	1034		9,184	953	596	8,637	935	657	9,514	1,116	808	11,874
Highlands and Islands	759		5,406	680	382	5,455	793	395	5,618	850	351	5,140

³³ Including the colleges that UHI comprises

³⁴ Not recorded

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Lanarkshire	1083		12,371	1251	895	13,049	1254	871	12,604	1,239	924	13,697
Tayside	444		3,938	406	278	3,923	517	238	3,528	485	261	3,864
West	867		6,246	665	388	5,534	650	451	6,490	860	395	5,755
West Lothian	463		3,846	394	266	3,794	311	229	3,341	325	277	4,088
Scotland	7,443		69,431	7,456	5,023	71,789	7,249	4,955	70,726	8,714	5,652	82,263

Source: SFC, 2019

5.11 As Table A3 shows, the four largest college providers (in terms of the numbers of enrolments) of ELC FE qualifications are Edinburgh College, Ayrshire College, West College Scotland and New College Lanarkshire, all with at least 850 enrolments in 2017/18. Forth Valley College has experienced the biggest increase in enrolments (128%), and only West College Scotland has seen a decrease, although in real terms this only represents 7 enrolments.

Table A3: College enrolments on qualifications relating to ELC – largest providers, 2014/15-2017/18

College	2014/15		2015/16		2016/17		2017/18		% change
	Enrolments	% of ELC	Enrolments	% of ELC	Enrolments	% of ELC	Enrolments	% of ELC	
Edinburgh College	641	9%	631	8%	657	9%	902	10%	41%
Ayrshire College	562	8%	940	13%	779	10%	862	10%	53%
West College Scotland	867	12%	665	9%	650	9%	860	10%	-1%
New College Lanarkshire	740	10%	859	12%	918	12%	858	10%	16%
Fife College	473	6%	526	7%	534	7%	646	7%	37%
Glasgow Clyde College	486	7%	486	7%	521	7%	584	7%	20%
Forth Valley College	251	3%	286	4%	277	4%	573	7%	128%
Dundee and Angus College	444	6%	406	5%	517	7%	485	6%	9%
North East Scotland College	388	5%	428	6%	481	6%	469	5%	21%
South Lanarkshire College	343	5%	392	5%	336	4%	381	4%	11%
Total	7,443	70%	7,457	75%	7,527	75%	8,714	76%	17%

Source: SFC, 2019

5.12 As Table A4 indicates, the proportion of ELC enrolments has shifted slightly over the past few years, with increased enrolments for Higher Education level qualifications.

Table A4: Enrolments by FE and HE level between 2014/15 and 2017/18

Level	2014/15		2015/16		2016/17		2017/18		% change
	Enrolments	% of ELC	Enrolments	% of ELC	Enrolments	% of ELC	Enrolments	% of ELC	
Further Education	5,402	73%	5,509	74%	5,427	72%	6,080	70%	13%
Higher Education	2,041	27%	1,948	26%	2,100	28%	2,634	30%	29%
Total	7,443	100%	7,457	100%	7,527	100%	8,714	100%	17%

Source: SFC, 2019

5.13 College learners studying for qualifications related to ELC are studying for a variety of qualifications and the SFC data records 13 different qualifications aims.

5.14 Table A.5 shows the change in qualification aims between 2016/17 and 2017/18, and as a proportion of total enrolments. In 2017/18, there were over 1,000 enrolments in each of the four categories, although enrolments only increased for HNC (or equivalent) qualifications and in those programmes not leading to recognised qualifications.

Table A.5: Qualification aims, 2016/17 and 2017/18

Qualification	2016/17		2017/18	
	Number	% of total enrolments	Number	% of total enrolments
Higher National Certificate or equivalent	1,601	21%	2,094	24%
National Certificate Award	1,627	22%	1,621	19%
Programme not leading to recognised qualification	571	8%	1,390	16%
SQA Skills for Work Award	1,159	15%	1,079	12%

Source: SFC, 2019

5.15 Table A.6 indicates the change in known destinations of college leavers between 2014/15 and 2016/17. Key findings are that 94.2% moved in to a positive destination (employment, further study), remaining steady from 94.3% in 2014/15. Only 3.9% moved into a negative destination (e.g. unemployment, economic inactivity) and this fell slightly from 4.4% in 2014/15. The remaining 1.9% moved into another destination³⁵ (e.g. temporarily sick or looking after the home or family, taking time out to travel), similar to 1.4% in 2014/15.

Table A.6: College leaver destinations, 2014/15 – 2016/17

Destination	2014/15	2015/16	2016/17
Positive	94.3%	94.0%	94.2%
Negative	4.4%	4.7%	3.9%
Other	1.4%	1.2%	1.9%

Source: SFC, 2019

5.16 Overall, HNC college leavers are slightly less likely to move into a positive destination than all other ELC college leavers. However, between 2014/15 and 2016/17, there has been a slight increase in positive destinations of those people completing HNC level qualifications, as shown in Table A.7.

Table A.7: Destination of HNC Completers, 2014/15 – 2016/17

Destination	2014/15	2015/16	2016/17
Positive	89.9%	91.8%	90.1%
Negative	8.3%	6.6%	7.6%
Other	0.8%	0.6%	2.2%

Source: SFC, 2019

Equality and diversity

5.17 In 2017/18, 8,714 students were enrolled in ELC-related subjects. It is, as we would expect, female dominated, and this has remained unchanged since 2014/15, and the age profile is relatively young, although it has become slightly older since 2014/15.

³⁵ College Leaver Destinations 2016-17 – SFC (October 2018)
http://www.sfc.ac.uk/web/FILES/statisticalpublications_sfcst072018/SFCST072018_College_Leaver_Destinations_2016-17_-_Complete_report.pdf

SVQs

5.18 Across the different levels, there were 3,185 registrations and 2,344 certifications on Children and Young People SVQs in 2017/18. This represented a year-on-year increase across both from 2016/17 and 2015/16, as shown at Table A.8. In 2017/18, Modern Apprenticeships accounted for just over half (52%) of all Children and Young People SVQ registrations. This grew from 44% in the previous year and was in line with the 52% share in 2015/16.

Table A.8: Provision of Children and Young People SVQs, 2014/15-2017/18

SVQ provision	2014/15	2015/16	2016/17	2017/18
Registrations	2,666	2,802	3,134	3,185
Certifications	2,211	2,076	2,301	2,344
MA as a % of SVQs	45%	52%	44%	52%

Source: SSSC data on SQVs and SDS data on Modern Apprenticeships

Modern Apprenticeships

5.19 In 2017/18 there were 1,691 MA starts in ELC-related subjects, the majority on the Social Services (Children and Young People Framework) which accounted for 88% (1,492 individuals) of all ELC-related registrations. A further 12% (199 individuals) had started on the Social Services (Children and Young People) Technical Apprenticeship framework. This is a marked increase on the 2014/15 figures as Table A.9 shows.

Table A.9: Modern Apprenticeships starts in ELC, 2014/15 - 2017/18

Framework	2014/15	2015/16	2016/17	2017/18	Change (%)
Social Services (Children and Young People Framework)	1,254	1,288	1,319	1,492	19%
Social Services (Children and Young People) Technical Apprenticeship Framework	19	150	81	199	947%
Children's Care, Learning & Development	0	1	0	0	-
Total	1,273	1,439	1,400	1,691	33%

Source: SDS, 2019

5.20 Mirroring the ELC workforce, the vast majority of registrations in 2017/18 were female, at 94%, as shown in Table A.10. This is fairly consistent across the two main frameworks, and is significantly higher than the proportion of females across all frameworks in the same year, at 39%.

Table A.10: Modern Apprenticeships in ELC, 2017/18

Framework	No.	Change from 2016/17	% Female	% Male
Social Services (Children and Young People) (Level 3)	1,492	+13%	94%	6%
Social Services (Children and Young People) Technical Apprenticeship (Level 4)	199	+146%	97%	3%
Children's Care, Learning & Development (Level 3)	0	-	-	-
Total	1,691	21%	94%	6%

Source: SDS, 2019

5.21 As show in Table A.11, ELC MAs tend to be younger than the profile of all MAs, with a combined 85% of ELC MAs comprised of 16-24 year olds compared to 70% for all MAs. A higher proportion of ELC MAs also have a disability.

Table A.11: Provision of Modern Apprenticeships in ELC by Equalities Measure, 2017/18

	All MA frameworks	ELC frameworks
Gender		
Female	38%	94%
Male	62%	6%
Age (at start)		
16-19	44%	65%
20-24	26%	20%
25+	30%	15%
Disability		
Yes	11%	18%
No	89%	82%
Care experience		
Yes	2%	3%
No	98%	97%
Ethnicity		
Mixed or multiple; Asian; African; Caribbean or Black; other ethnic	2%	2%
White	98%	98%

Source: SDS, 2019

5.22 Lanarkshire and Glasgow college regions have the most provision of MAs across ELC (both 19%), with Glasgow also having the greatest proportion of Scotland's DCC workforce at 18%. Edinburgh and Lothians also have a high proportion of MAs in ELC at 12% as well as a high proportion of the DCC Workforce at 15%. Both Aberdeen and Aberdeenshire and Highlands and Islands have higher proportions of the total DCC workforce (10% and 8% respectively) than they do MAs in ELC (7% and 3% respectively).

5.23 For the 1,401 MA leavers of the three ELC-related frameworks at the end of March 2018, there was an achievement rate³⁶ of 73%, five percentage points below the all-framework achievement rate of 78%, as shown in Table A.12.

Table A.12: Modern Apprenticeship: in training, leavers, and achievements, end of March 2018

Frameworks	No of Leavers			In Training			Achievements			Achievements as % of All Leavers		
	F	M	Tot.	F	M	Tot.	F	M	Tot.	F	M	Tot.
Children's Care, Learning & Development	-	-	-	0	0	0	-	-	-	100%	0%	100%
Social Services (Children and Young People)	1,234	54	1,288	1,725	103	1,828	913	32	945	74%	59%	73%
Social Services (Children and Young People) Technical Apprenticeship	107	6	113	239	7	246	-	-	79	-	-	70%
Total	1,341	60	1,401	1,964	110	2,074	913	32	1,027	68%	53%	73%

Source: SDS, 2019

5.24 The MA Outcomes Survey conducted by SDS in 2016, presents destinations data of the apprentice post completion of MA. This shows that 81% of MAs in Social Services (Children and Young People) were still working six months post completion, and 90% were either in work or education.

³⁶ Achievements are counted when a claim for payment has been made and approved in the financial year. Therefore, the achievement rate is the number of certificated leavers registered in the financial year as a percentage of all Mas registered as leavers on the system. This rate may be higher than 100% in some instances where the number of achievements exceeds the number of leavers. This occurs when a Provider has entered leaver details on the recording system in one financial year and claimed for the related achievement in the next.

Foundation Apprenticeships

5.25 Foundation Apprenticeships (FAs) were developed to provide better recognition of work-based learning and as a response to the challenge of skills shortages. Successful completion of the Foundation Apprenticeship will allow young people to gain entry to Modern Apprenticeship in the sector, continue studies at college or university or go straight in to a job in the children’s social service sector. As shown in Table A.13, FA starts in the latest 2018/20 cohort were dominated by females, at 97%, compared to 54% across all FA frameworks.

Table A.13: Provision of Foundation Apprenticeships in ELC, 2018/20

Cohort	Number of starts	% Female	% Male	Number of LAs delivering
2018/20	494	97%	3%	28
2017/19	466	96%	4%	25
2016/18	57	93%	7%	8

Source: SDS, 2019

5.26 The number of young people undertaking an FA has grown substantially from 57 starts in the Social Services (Children and Young People) framework in the 2016/18 cohort to 494 in 2018/20. As well as increasing the volume of ELC-related FA starts, their delivery across Scotland has also expanded. This framework is being delivered across 28 of Scotland’s 32 local authorities for the 2018/20 cohort, an expansion from 25 LAs during the 2017/19 cohort and 8 for the 2016/18 cohort.

Graduate Apprenticeships

5.27 SDS has worked with industry, and Scottish universities and colleges to pioneer a new approach with employers to create a structured work based learning offer for higher education in Scotland in the shape of new Graduate Level Apprenticeships (GLAs). GLAs are accredited work based learning programmes at SCQF levels 8 to 11. They lead to degrees or to degree level, professionally recognised, qualifications and provide a mechanism for supporting non-traditional entry to university, particularly for those whose aspirations have not previously been to enter full-time degree programmes. They also provide a direct pathway for young people who have selected vocational options, such as FAs, in the senior phase of secondary school.

5.28 There were 278 GLA starts in 2017/18, focussed on engineering, civil engineering, IT and financial and business services sectors. During 2018/19 a GA was developed for Early Years and Childcare and is currently being piloted. UWS and UHI are the delivery partners for the GA pilot. The pilot is expected to support two cohorts of 15 each and the first intake will commence in September 2019. The pilot offers an opportunity for candidates to study for an undergraduate degree and gain SSSC’s practitioner status, all within three years. The delivery partners are expected to use different delivery models e.g. UHI plan to delivery largely online and UWS are planning a more traditional day release campus based delivery model.

University Provision

5.29 HEIs are important providers of ELC education and training and there are 10 universities (including Open University) in Scotland that deliver relevant provision. In 2017/18 there were just over 1,707 enrolments in ELC related courses. The University of the Highlands and Islands accounts for 22% of all enrolments (first degree, other undergraduate and postgraduate), while Strathclyde University (18%) and Dundee University (16%) are the next largest HEI providers.

5.30 For undergraduate degrees, BA Childhood Practice accounted for the largest proportion of enrolments in 2017/18 (72%), shown in Table A.14. Early Years degrees account for the vast majority

(89%) of postgraduate degrees in the sector. First degrees in training nursery teachers accounted for around 16% of ELC-related university provision (undergraduate and postgraduate) in 2017/18 representing a total of 272 enrolments. A total of 60 people enrolled in Early Years degrees across undergraduate and postgraduate levels, 4% of the overall enrolment.

Table A.14: Enrolments on courses at Scottish HEIs relating to ELC, 2014/15-2017/18

Course by Degree Level	2014/15	2015/16	2016/17	2017/18	% change
First Degree					
BA Childhood Practice	654	758	847	1,031	58%
Child care	64	42	52	28	-56%
Early years	89	100	97	95	7%
Training teachers-nursery	192	259	269	272	42%
Other Undergraduate					
BA Childhood Practice	10	38	22	-	-
Child care	217	221	10	-	-
Early years	44	72	35	2	-95%
Postgraduate					
Child care	46	39	32	32	-30%
Early years	139	194	213	247	78%

Source: SFC, 2019

5.31 As Table A.15 illustrates, students in ELC subjects at HEIs tend to be older with 68% of total ELC-related enrolments aged 25 years and older in 2017/18, however this is a 2% decrease since 2014/15. The percentage of all HEI young enrolments aged 16-19 has fallen from 18% in 2014/15 to 9% in 2017/18. There have been no changes in disability, care experience or ethnicity enrolments since 2014/15.

Table A.15: Enrolments on courses at Scottish HEIs relating to ELC by equalities measure, 2014/15 and 2017/18

	2014/15	2017/18
Gender		
Female	94%	95%
Male	6%	5%
Age		
16-19	18%	9%
20-24	14%	21%
25+	68%	70%
Disability		
Yes	9%	9%
No	91%	91%
Care experience		
Yes	1%	1%
No	99%	99%
Ethnicity		
Mixed or multiple; Asian; African; Caribbean or Black; other ethnic	2%	2%
White	98%	98%

Source: SFC, 2019

5.32 Table A.16 indicates the change in equalities measures of those enrolled on the BA Childhood Practice course at Scottish HEIs between 2014/15 and 2017/18. There is less diversity in these enrolments in terms of age, disability and ethnicity than in the wider enrolment cohorts, although the profile of students is older.

Table A.16: Enrolments on BA Childhood Practice course at Scottish HEIs by equalities measure, 2014/15 and 2017/18

	2014/15	2017/18
Gender		
Female	98%	98%
Male	2%	2%
Age		
16-19	1%	1%
20-24	9%	15%
25+	91%	85%
Disability		
Yes	6%	8%
No	94%	92%
Care experience		
Yes	1%	1%
No	99%	99%
Ethnicity		
Mixed or multiple; Asian; African; Caribbean or Black; other ethnic	1%	2%
White	99%	98%

Source: SFC, 2019

5.33 Ten HEIs offered courses related to ELC in 2017/18. The University of Highlands and Islands had the highest enrolments at 22%, followed by the University of Strathclyde (18%) and the University of Dundee (16%). First degree enrolments were significantly higher at the University of Highlands and Islands, 26% of the total, with the University of Dundee and the University of Glasgow making up the remainder of the top three. Along with the University of Strathclyde (39%), the Universities of Stirling and Aberdeen had the most postgraduate enrolments at 33% and 22% respectively³⁷.

5.34 The vast majority (96.5%) of university leavers in these subject areas move in to employment on completing their degree. Of these, 36% enter the Education sector and 14% enter Human Health/Social Care. A further 30% take up jobs in Public Administration and 5% take up further study.

³⁷ Only those HEIs and the University of the West of Scotland had postgraduate enrolments in 2017/18.

Appendix B – Comparison of SSSC Workforce Analysis and Survey Sample

Table B.1: Comparison of Scottish DCC and Childminding Services workforce and survey sample

Characteristic	Workforce (n=39,270)	Survey Sample (n=3,638)
Gender		
Female	97%	98%
Male	3%	2%
Age		
Under 25 years	19%	11%
25 to 34 years	23%	18%
35 to 44 years	22%	24%
45 to 54 years	22%	30%
55-64 years	13%	25%
Over 64 years	1%	1%
Not know/prefer not to say	-	1%
Ethnicity		
White	98%	98%
Mixed	>1%	>1%
Asian	>1%	>1%
Black	>1%	>1%
Other	>1%	1%
Unknown	1%	1%
Geography		
Larger cities	30%	25%
Urban with substantial rural	41%	42%
Mainly rural	27%	32%
Islands and remote	3%	4%
Service		
DCC	87%	74%
Childminders	13%	26%
Job role		
Administrative/Support/Ancillary Worker	4%	n/a
Class 2/3 Care Worker	70%	
Class 4 Care Worker	3%	
Managers/Director/Chief Executive	9%	
Job Function Not Known	13%	
Lead practice/service manager (ELC only)	n/a	
Practitioner (ELC only)	n/a	
Support worker (ELC only)	n/a	27%
		50%
		23%
Sector type³⁸		
DCC - Public	42%	56%
DCC - Independent	40%	36%
DCC - Third	19%	9%
Childminders - Public	0%	20%
Childminders – Independent sector	100%	68%
Childminders – Third sector	0%	1.3%
Mode of working		
Full-time	52%	67%
Part-time	48%	33%
Qualifications		
No qualifications	n/a	4%
Other qualifications		4%
SCQF 1-5 +		92%
SCQF 6 +		75%
SCQF 7 +		56%

³⁸ NB The total survey figures are skewed by the fact that 68% of childminders reported being employed in the independent sector, but some reported multiple employment options

Characteristic	Workforce (n=39,270)	Survey Sample (n=3,638)
SCQF 8 +		26%
SCQF 9 +		14%
SCQF 10-12		4%