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Research on Implications of Brexit on Social Care and Childcare Workforce in Wales

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Views expressed in this report are those of the researchers and not
necessarily those of the Welsh Government

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Glossary

Glossary text

| Acronym/Key word | Definition |
|------------------|---|
| Brexit | The withdrawal of the UK from the European Union |
| CCLD | Childhood, Care, Learning and Development qualification |
| CIW | Care Inspectorate Wales |
| EU | European Union |
| LCI | Lower confidence interval |
| NMC | Nursing and Midwifery Council |
| SCW | Social Care Wales |
| UCI | Upper confidence interval |

1. Introduction

- 1.1 The Welsh Government commissioned Ipsos MORI to conduct an independent survey of service providers to help understand the potential impact of Brexit, and how it may interact with workforce challenges already facing the social care and childcare sectors.
- 1.2 The over-arching objective of the survey was to provide information on the number of non-UK EU workers in specific social care and childcare sub-sectors (domiciliary care services, residential care services, residential homes for children, childminding and day care of children).
- 1.3 Specifically, it aimed to:
 - provide robust estimates of the current contribution of non-UK EU workers within the registered social care and childcare sectors;
 - identify the scale of challenges providers may face around recruitment and retention, both in general, and as a possible result of Brexit.
- 1.4 The next section of this report details the research methodology and provides guidance on interpreting the results. Section 3 provides estimates of the number of non-UK EU workers working within registered social care settings, while Section 4 outlines findings on staff recruitment and retention. Sections 5 and 6 mirror these sections for childcare, while Section 7 presents the results from additional questions around maximum registered capacity, waiting lists and staff qualifications in the childcare sector. Finally, key findings from this research are summarised in Section 8.

2. Methodology

- 2.1 This research involved a mixed-mode survey of registered social care services and childcare services in Wales. The survey was available both online and via telephone (using Computer Assisted Personal Interviewing). Both modes were available in Welsh or English.

Sample

- 2.2 The Welsh Government provided Ipsos MORI with details of settings registered with the Care Inspectorate Wales (CIW)¹. All services with an available email or postal address were invited to complete the survey online (either by email or letter). Quotas were set (and used to target additional telephone interviewing) to ensure that sufficient interviews were obtained overall and within each sub-sector.
- 2.3 Fieldwork took place from 17 December 2018 to 16 January 2019. In total, 850 services responded to the survey, 87 online and 763 by phone, yielding 843 usable responses.²

¹ Up until 1 April 2019 only domiciliary care providers and residential homes (adult & child) have to register with CIW under the Regulation and Inspection of Social Care (Wales) Act 2016 (RISCA), from April 2019 fostering, adoption, adult placement and advocacy services will also register under RISCA however these weren't included due to the small numbers in Wales which would have made sampling difficult. The survey does not include micro-providers with four or fewer staff as they are exempt from registering under RISCA. Only local authority staff that are working in a registered setting e.g. in-house domiciliary care or care home service.

² 7 cases were removed during data cleaning due to incomplete or contradictory information.

Table 2.1: Sample profile of registered care settings in Wales

| Sub-sector | Population | | Achieved sample | | Response rate |
|--------------------------------|--------------------|-----------------|-------------------------------|-------------|---------------|
| | Number of services | % of population | Number of services responding | % of sample | % |
| Domiciliary care | 453 | 8% | 167 | 20% | 37% |
| Residential care | 1,084 | 19% | 257 | 30% | 24% |
| Residential homes for children | 166 | 3% | 62 | 7% | 37% |
| Child-minding | 2,156 ³ | 37% | 108 | 13% | 5% |
| Day care of children | 1,943 | 33% | 249 | 30% | 13% |

Questionnaire design

- 2.4 This study is similar to one undertaken by Ipsos MORI looking at the contribution of non-UK EU workers within the social care workforce in Scotland.⁴ However, the questionnaire was changed to reflect differences between the Scottish and Welsh contexts (see Annex A for full questionnaire).
- 2.5 The questionnaire was deliberately kept as short as possible to encourage participation among the target audience and help ensure the robustness of the results.
- 2.6 The core of the questionnaire comprised a series of questions to collect the total number of staff currently working in the services sampled – including the numbers in different staff categories – and the numbers in each case who were non-UK EU nationals. In addition, the questionnaire included a small number of pre-coded questions to collect information on perceptions of staff recruitment and retention (in general and with reference to non-UK EU staff in particular). Additionally, for

³ Number of services on the full register. This includes suspended services.

⁴ Ipsos MORI. (2018). The Contribution of Non-UK EU Workers in the Social Care Workforce in Scotland [online]. Edinburgh: Scottish Government. Available from: <https://www.gov.scot/publications/contribution-non-uk-eu-workers-social-care-workforce-scotland/> [Accessed 13 February 2019]

childcare only, a small number of questions covering capacity and staff qualifications were asked.⁵

Analysis and interpretation

- 2.7 The data was weighted by subsector to ensure it was representative of the population of registered social care and childcare services. All figures and percentages in this report (with the exception of the sample sizes) are based on the weighted data. Where percentages do not sum to 100%, this may be due to rounding, the exclusion of 'don't know' categories or multiple answers.
- 2.8 Population estimates for the proportion of non-UK EU staff were calculated using a combination of survey data, and population data about the number of services and number of staff provided by the Welsh Government.
- 2.9 All survey estimates are subject to sampling error and vary in their likely margin of error, the range within which the 'true' figure is likely to lie. Estimates at the overall level (for the whole sample) are accurate to approximately +/- 3 percentage points. Estimates at sub-sector level (domiciliary care, residential care, residential homes for children, childminding and day care of children) are accurate to approximately +/- 5 percentage points. Key estimates in this report – particularly for the proportion of non-UK EU staff – are always presented with lower and upper confidence intervals (LCI and UCI) shown.

Research limitations

- 2.10 Only settings registered with CIW were within the scope of this research. Registered settings account for approximately two thirds of the social care sector in Wales.
- 2.11 The completeness of information on the sample frame was variable – in particular, only around 28% of the sample included an email address.
- 2.12 Smaller sub-groups – for example, breakdowns by region or staff group within sector – have wider confidence intervals, and greater caution should therefore be applied in interpreting these findings.

⁵ Social Care Wales has recently published information on social care staff qualification levels in preparation for the introduction of mandatory registration of workers <https://socialcare.wales/resources/social-care-wales-workforce-development-programme-scwwdp-workforce-data-collection-2017-commissioned-care-provider-services>.

2.13 The survey asked separate questions about staff from the Republic of Ireland, however, the number of settings employing staff from this country was very small and therefore this analysis is not included in this report.

3. Social care: Size of the non-UK EU workforce

- 3.1 An estimated 6.4% of staff employed by registered social care settings in Wales are non-UK EU nationals. Welsh Government figures suggest there are approximately 45,450 people working within registered social care settings in Wales, and therefore, 6.4% equates to around 2,900 workers.⁶ The lower confidence interval (LCI) of this estimate is 4.5% and upper confidence interval (UCI) is 8.2%. This equates to between 2,060 and 3,730 workers.

Variations in the proportion of EU staff by sub-sector, employer type and staff group

- 3.2 There was some variation in the estimated prevalence of non-UK EU staff by **sub-sector** (domiciliary care, residential care, residential homes for children – see Table 3.1 and Figure 3.1), **employer type** (public, private or voluntary – see Figure 3.2) and **staff group** (Managers, Administrative/support staff, Childcare practitioners,⁷ NMC registered nurses, and social and healthcare practitioners – see Figure 3.3).⁸
- 3.3 In most cases, the confidence intervals for different sub-groups overlap, meaning that some caution should be applied in interpreting the actual likely extent of any difference between groups. However, NMC registered nurses appear to be the staff group with the highest proportion of non-UK EU workers (17.7%, LCI = 9.5%; UCI = 26.0%).

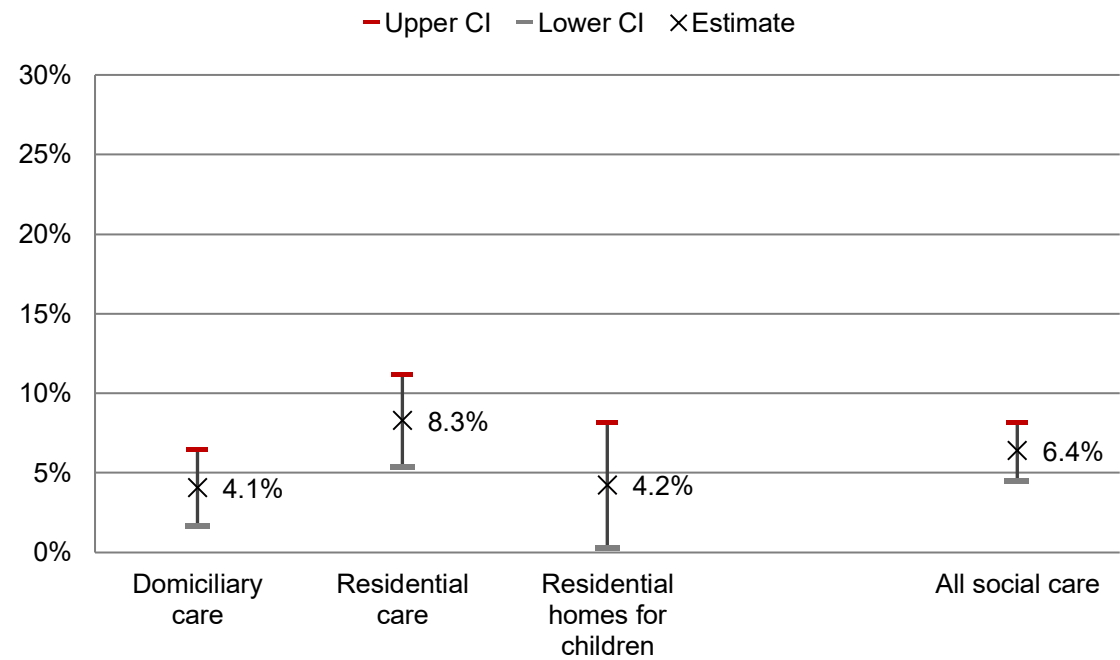
⁶ The population data supplied by the Welsh Government is based on data from the SCW workforce survey (SCWDP 2017), STF 2017-18 and Social Care Wales Register 2018.

⁷ Social care services employing childcare practitioners are largely residential homes for children.

⁸ Staff category definitions included in the survey were as follows:

- Manager (including Service/Home Manager) – including: unit/project managers, group managers/directors, assistant managers.
- Administrative/support staff member – including: clerical, finance and HR and ancillary staff (e.g. catering, domestic, gardening).
- Childcare Practitioner - including: childminders, day care managers/supervisors, sessional care supervisors, room supervisors or team leaders, nursery nurse assistants, and out of school childcare practitioners.
- Nursing and Midwifery Council (NMC) Registered Nurse.
- Social care or healthcare practitioner (except NMC Registered nurses) – including: social workers, care assistants, care workers, care officers, care co-coordinators, senior care workers, occupational therapists, health care support workers.

Figure 3.1: Estimates of proportion of non-UK EU staff within registered social care settings

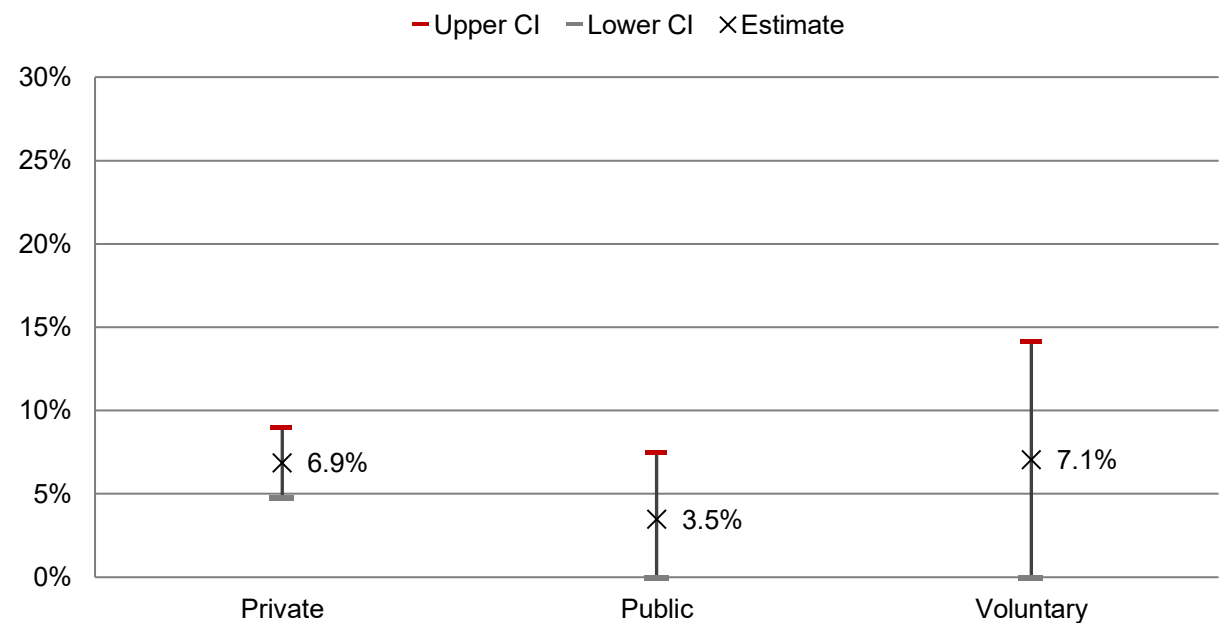


Base: All domiciliary care (167); residential care service (257); residential homes for children (62); all social care (486)

Table 3.1: Estimates of size of non-UK EU staff within registered social care settings

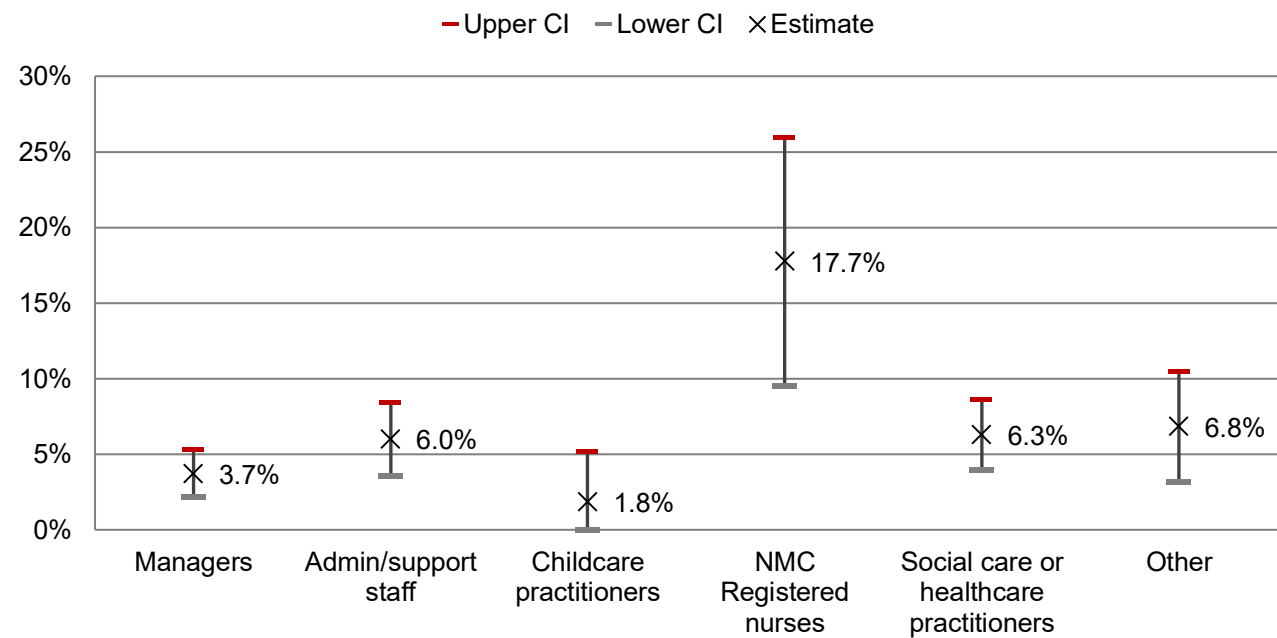
| | Domiciliary care | Residential care | Residential homes for children | <i>All social care</i> |
|--------------------------------|------------------|------------------|--------------------------------------|------------------------|
| Population figures | | | | |
| Total services | 453 | 1,084 | 166 | 1,703 |
| Total staff | 17,844 | 24,744 | 2,871 | 45,459 |
| Survey figures | | | | |
| Total services (unweighted) | 167 | 257 | 62 | 486 |
| Total staff (unweighted) | 10,844 | 7,561 | 1,232 | 19,637 |
| Estimates | | | | |
| % of staff from non-UK EU | 4.1% | 8.3% | 4.2% | 6.4% |
| Total staff from non-UK EU | 730 | 2,050 | 120 | 2,900 |
| Confidence intervals | | | | |
| Lower % | 1.7% | 5.3% | 0.3% | 4.5% |
| Upper % | 6.5% | 11.2% | 8.2% | 8.2% |
| Lower estimate | 300 | 1,320 | 10 | 2,060 |
| Upper estimate | 1,150 | 2,780 | 230 | 3,730 |

Figure 3.2: Estimates by employer type within registered social care settings



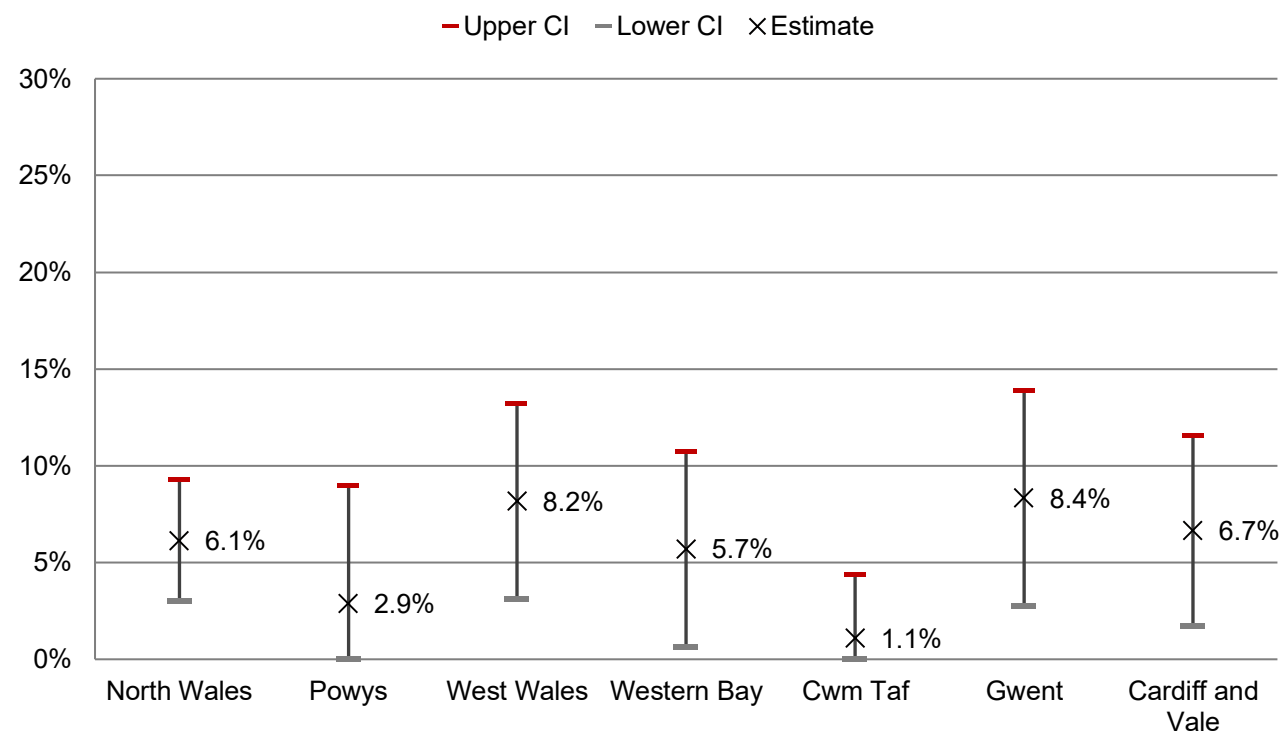
Base: All private (389); public (57); voluntary (36)

Figure 3.3: Estimates by types of staff within registered social care settings



Base: All social care services employing managers (485); admin/support staff (321); childcare practitioners (52); NMC registered nurses (73); social care or healthcare practitioners (367); other (162)

Figure 3.4: Estimates by Regional Partnership Boards⁹ within registered social care settings



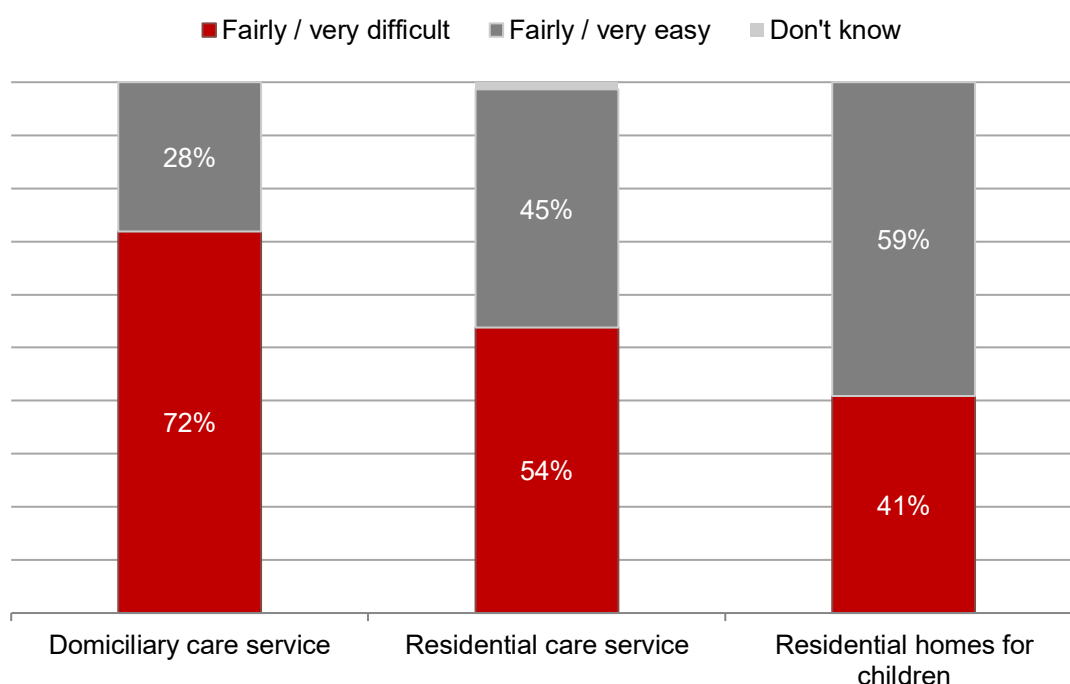
Base: All social care services in North Wales (160); Powys (21); West Wales (81); Western Bay (58); Cwm Taf (28); Gwent (68); Cardiff and Vale (70)

⁹ In April 2016, seven statutory regional partnerships came into being. Their purpose is to drive the strategic regional delivery of social services in close collaboration with health. See here: <https://socialcare.wales/hub/sswbact-regional-partnership-boards>

4. Social care: Views on staff retention and recruitment

- 4.1 Respondents were asked for their views on recruitment and retention within social care, including the extent to which they had found it easier or more difficult to recruit and retain non-UK EU workers over the last 12 months.
- 4.2 The findings indicate that recruitment is a key challenge for the social care sector. Across all registered social care providers who responded, 58% said they had found it difficult to recruit within the last 12 months (28% 'very difficult' and 30% 'fairly difficult').
- 4.3 Domiciliary care services were particularly likely to say they had found recruitment difficult in the last year (72% - 41% very difficult and 31% fairly difficult), followed by 54% of residential care services (25% very difficult; 29% fairly difficult) and 41% of residential homes for children (9% very difficult; 32% fairly difficult).

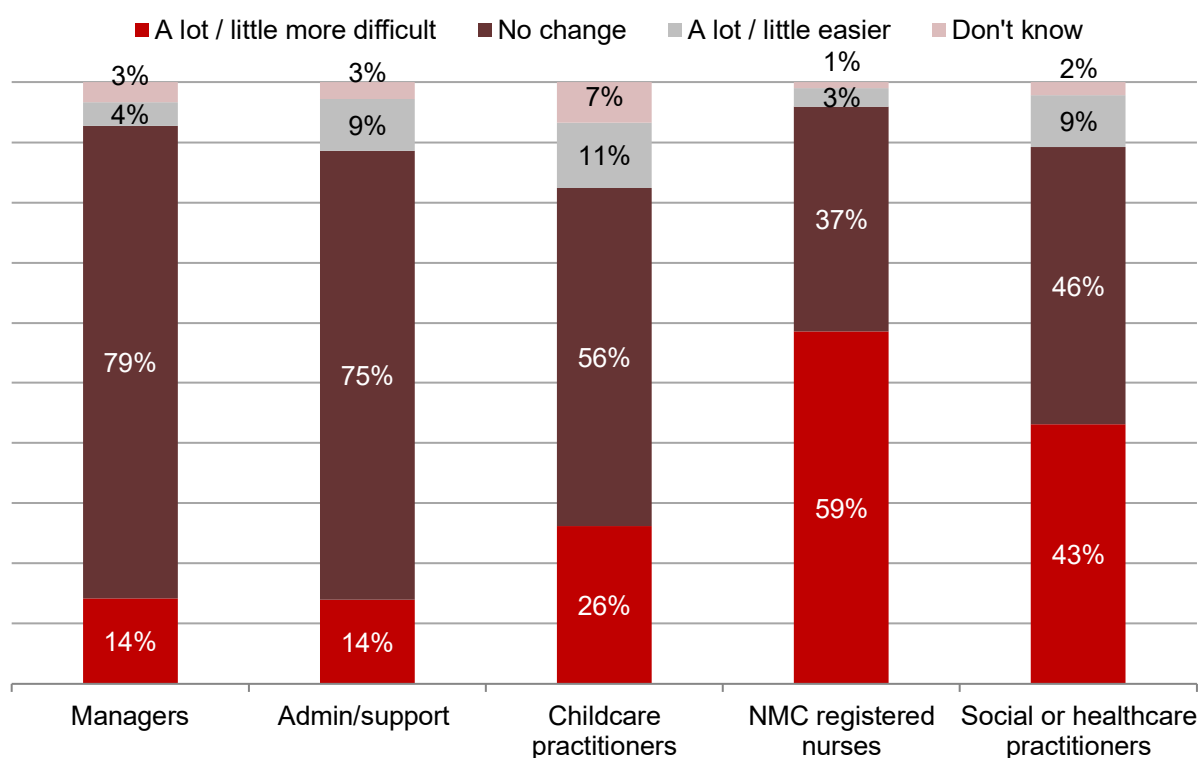
Figure 4.1: Ease of recruitment within last 12 months – social care



Base: All services who had tried to recruit staff in last 12 months - domiciliary care (163); residential care service (239); residential homes for children (58)

4.4 In terms of staff groups, it appears to have become more difficult to recruit NMC registered nurses and social or healthcare practitioners in particular (Figure 4.2).¹⁰ Over half (59%) of respondents who had tried to recruit NMC registered nurses said this had become more difficult in the last 12 months (48% a lot more difficult and 11% a little more difficult), while 43% said the same in relation to social or healthcare practitioners (29% a lot more difficult; 14% a little more difficult). Around a quarter (26%) of those who had tried to recruit childcare practitioners in the last year said it had become more difficult to do so¹¹, while 14% said the same about recruiting managers and administrative/support staff.

Figure 4.2: Ease of recruitment by staff group – social care



Base: All social care services who have tried to recruit managers (360); admin/support (267); childcare practitioners (44); NMC registered nurses (70); social or healthcare (339)

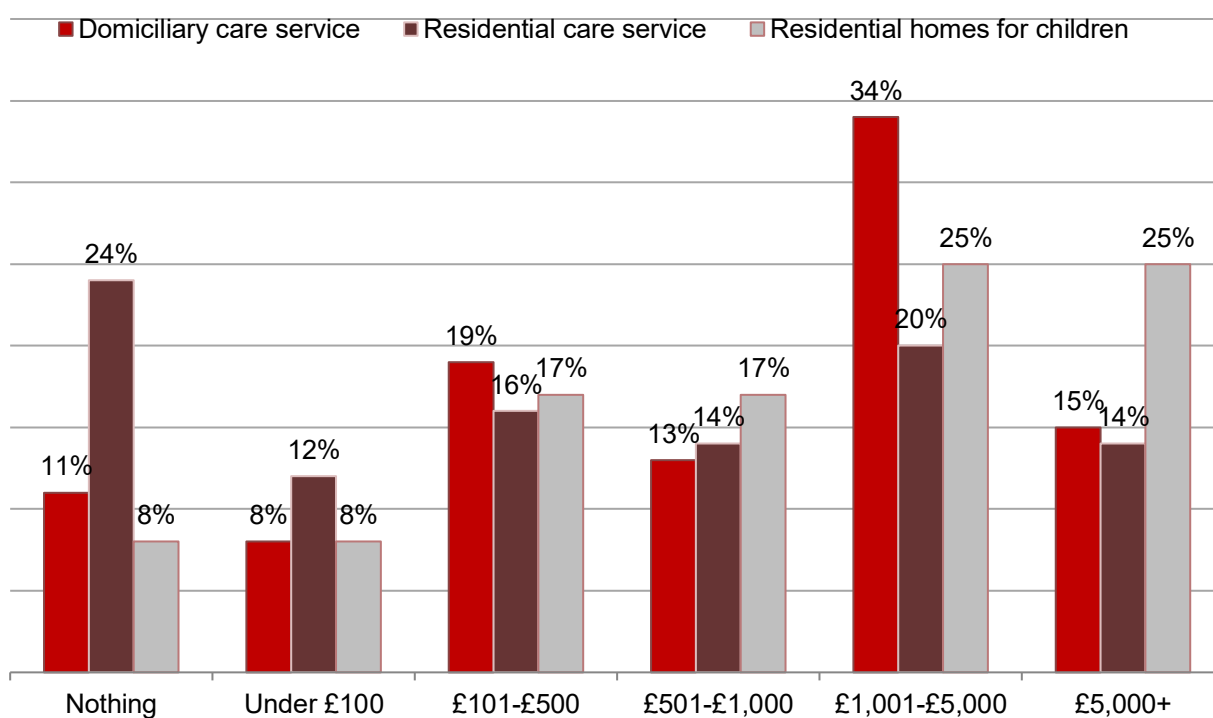
¹⁰ Of the services employing NMC nurses, almost three quarters (74%) were residential care services.

¹¹ Note the small base size for childcare practitioners means the results should be treated with some caution. Social care services employing childcare practitioners are largely residential homes for children.

Cost of recruitment

- 4.5 Registered social care providers were asked how much they had spent on recruitment in the last year. As would be expected, larger organisations tended to spend more on recruitment, with larger services (employing more than 30 staff) spending more: 51% of this group spent £1,000+ compared to the survey average of 41%.
- 4.6 There was again variation by sub-sector (Figure 4.3). Almost a quarter (24%) of residential care services said they spent nothing on recruitment within the last 12 months, whilst 11% of domiciliary care and 8% of residential homes for children said the same.

Figure 4.3: Cost of recruitment – social care

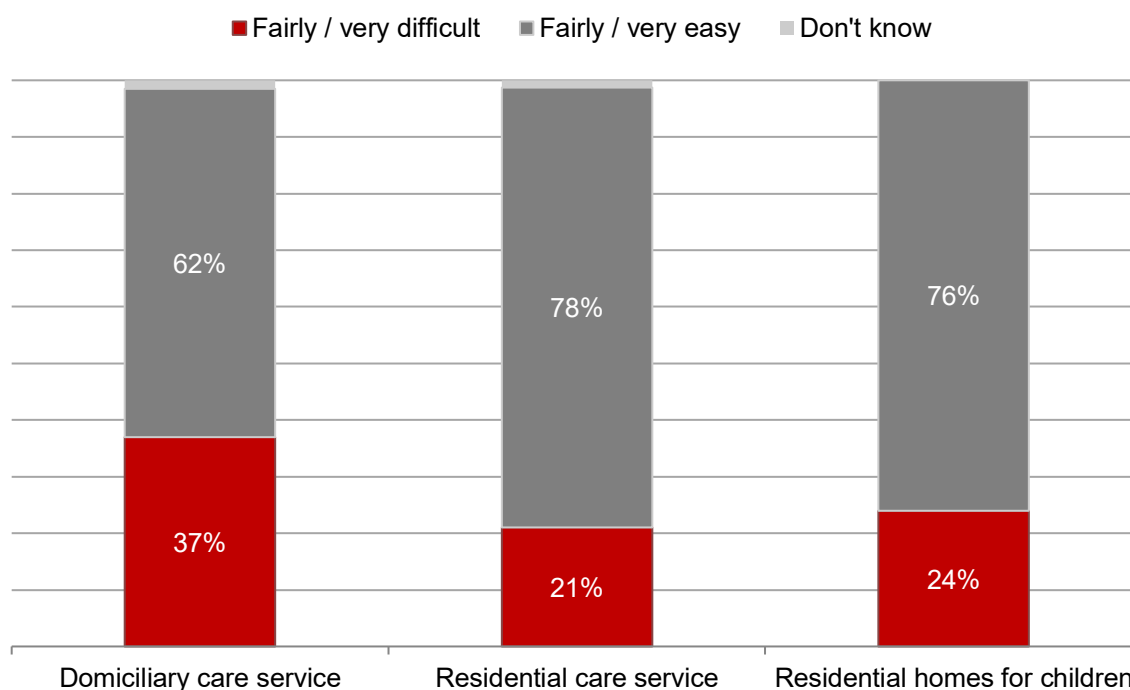


Base: All social care services that had tried to recruit in last 12 months and could estimate how much was spent on recruitment - domiciliary care (132); residential care service (151); residential homes for children (29)

Retention

- 4.7 Difficulties with retaining social care staff were less widespread than challenges recruiting them in the first place. However, a quarter of registered social care services nonetheless said they had found it difficult to retain staff in the last year (7% very difficult and 19% fairly difficult).
- 4.8 Again, staff retention appears especially challenging for domiciliary care services (Figure 4.4) - 37% of domiciliary care respondents said they found it difficult to recruit within the last 12 months (9% very difficult and 28% fairly difficult), compared with 24% of residential homes for children that said the same (8% very difficult and 16% fairly difficult) and 21% of residential care services (6% very difficult and 15% fairly difficult).

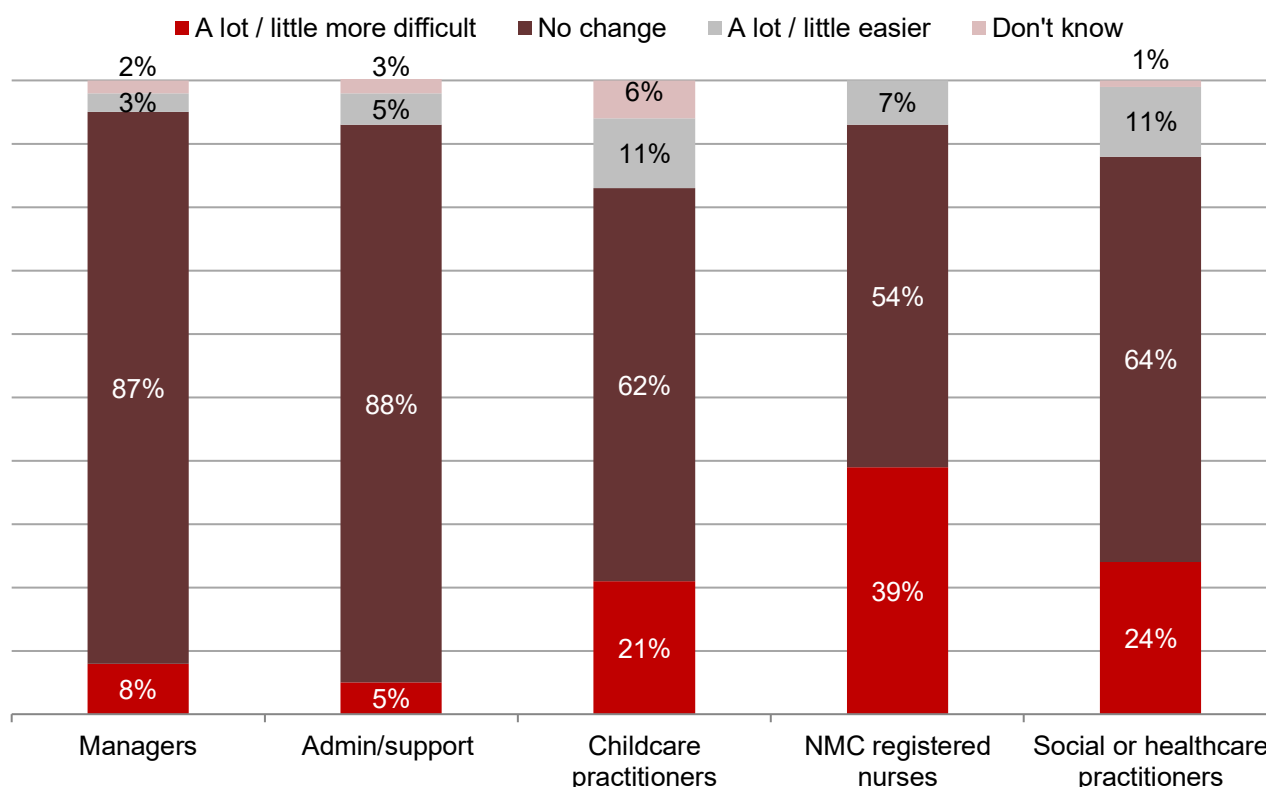
Figure 4.4: Ease of retention within last 12 months – social care



Base: All services where applicable - domiciliary care (165); residential care service (255); residential homes for children (62)

4.9 In line with the findings on recruitment, almost two in five services (39%) said retention of NMC registered nurses had become more difficult within the last 12 months (17% a lot more difficult and 22% a little more difficult). Twenty-four per cent said the same about social or healthcare practitioners (11% a lot more difficult; 13% a little more difficult), and 21% said this of childcare practitioners (14% a lot more difficult; 7% a little more difficult).¹²

Figure 4.5: Ease of retention by staff group – social care



Base: All social care services employing - managers (457); admin/support (308); childcare practitioners (50); NMC registered nurses (72); social or healthcare (360)

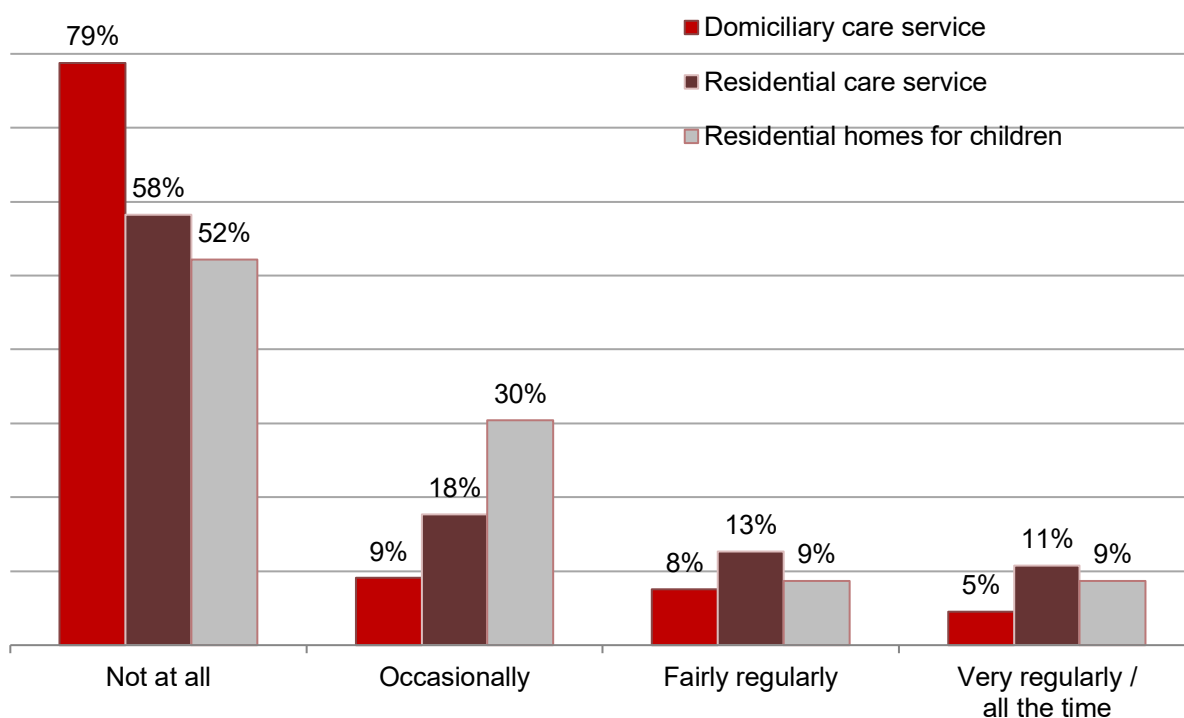
Use of supply or agency staff

4.10 Over a third (36%) of respondents said their registered social care service had used supply or agency staff within the last 12 months, with 9% using supply or agency staff very regularly/all the time, 11% fairly regularly and 17% occasionally. 63% had not used supply or agency staff within the last 12 months.

¹² Note the small base size for childcare practitioners means the results should be treated with some caution.

4.11 Results indicate lower use of agency staff amongst domiciliary care services: almost four in five (79%) had not used supply or agency staff within the last 12 months, compared to 58% of residential care services and 52% of residential homes for children.

Figure 4.6: Use of agency staff – social care

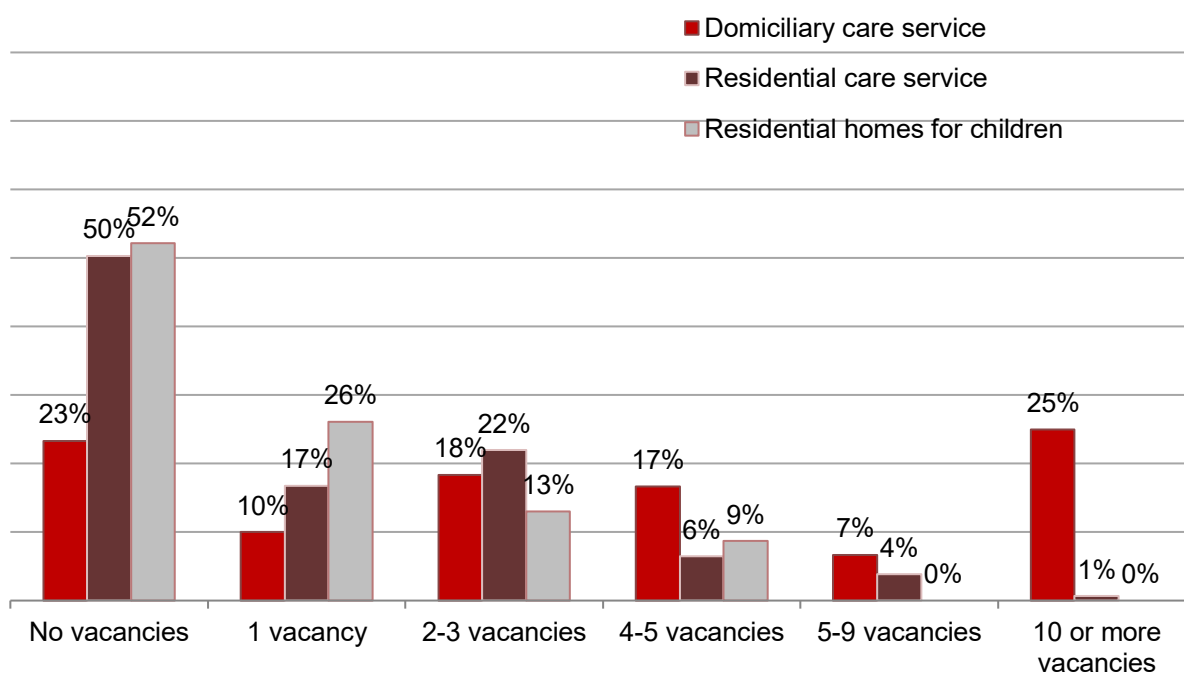


Base: All social care services - domiciliary care (167); residential care service (257); residential homes for children (62)

Staff vacancies

4.12 Over three quarters (77%) of domiciliary care services had at least one vacancy at the time of interview, as did half of residential care services and 48% of residential homes for children.

Figure 4.7: Staff vacancies – social care

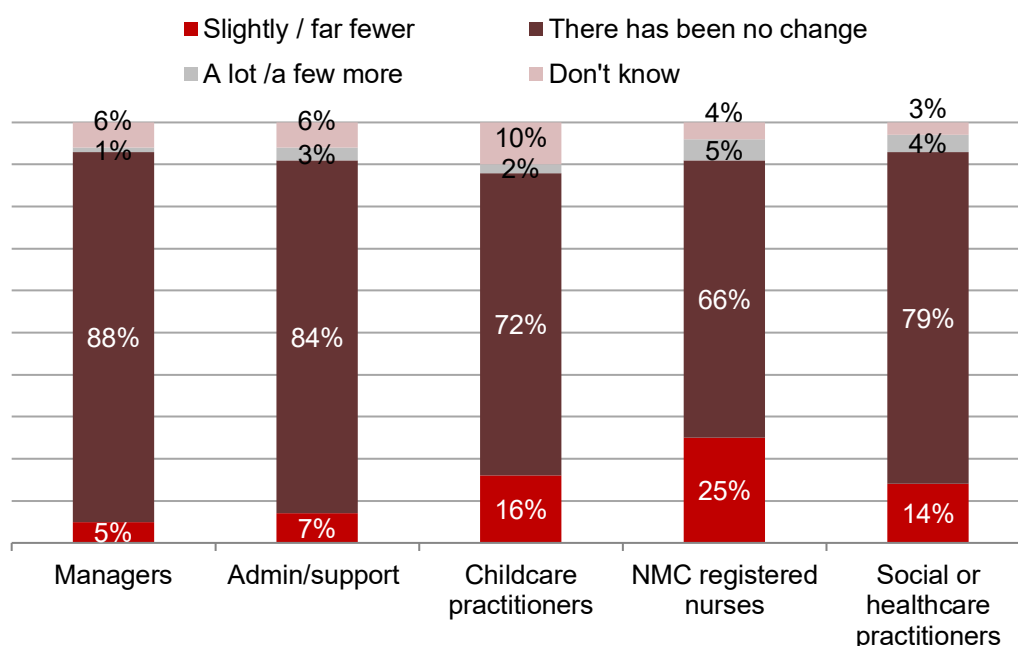


Base: All social care services - domiciliary care (157); residential care service (253); residential homes for children (62)

Recruitment and retention of non-UK EU workers

- 4.13 Most services reported no observed change in the level of applications they were receiving from non-UK EU workers (Figure 4.8). However, echoing the pattern of general perceived challenges in recruitment outlined above, services were more likely to say they had received fewer applications from non-UK EU workers for NMC registered nurse posts (25%), childcare practitioner roles (16%; although 10% also said they had received more), and social or healthcare practitioner jobs (14%) in comparison with managerial or administrative posts (5% and 7% respectively).

Figure 4.8: Applications from non-UK EU workforce – social care

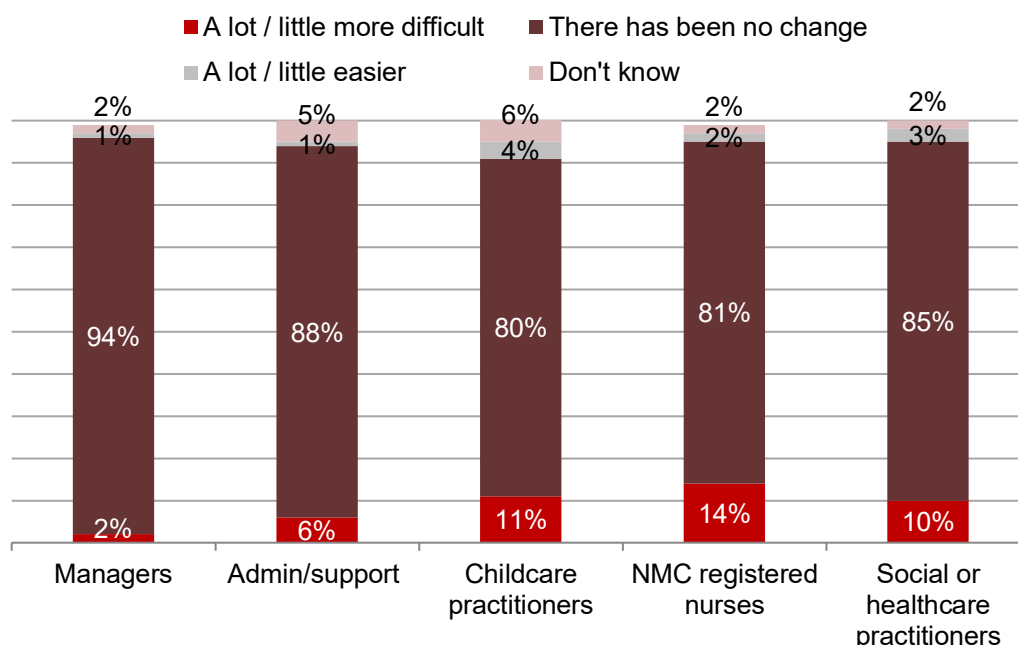


Base: All social care services who have tried to recruit - managers (348); admin/support (259); childcare practitioners (48); NMC registered nurses (68); social or healthcare (336)

- 4.14 Overall, most social care services also reported no observed change in the difficulty of retaining non-UK EU staff within the last year. However, again, a slightly higher proportion reported that retaining NMC registered nurses from the EU had become more difficult (14%, 7% a lot more difficult; 7% a little more difficult), while around 1 in 10 in each case reported that it had become more difficult to retain social and health care practitioners (5% a lot more difficult; 4% a little more difficult) and childcare practitioners (4% a lot more difficult; 7% a little more difficult) – Figure 4.9.¹³

¹³ Note the small base size for childcare practitioners means the results should be treated with some caution.

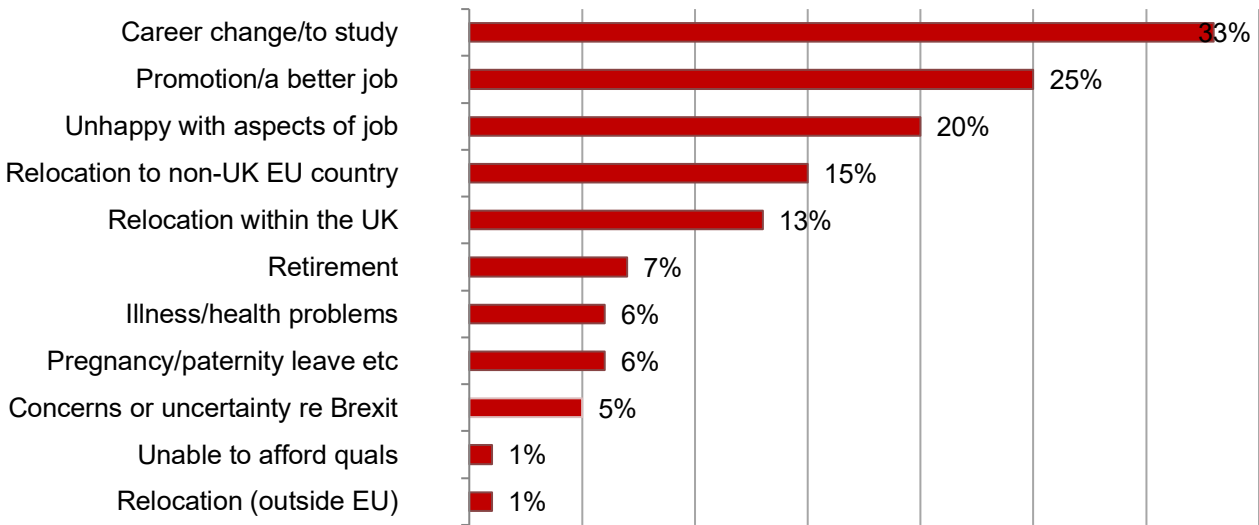
Figure 4.9: Retention of non-UK EU workers – social care



Base: All social care services who have non-UK staff in role within last 12 months - managers (162); admin/support (122); childcare practitioners (26); NMC registered nurses (44); social or healthcare (195)

- 4.15 Across social care respondents 18% said at least one non-UK EU staff member had left their service within the last 12 months. There was very little variation by sub-sector: this figure was 17% for domiciliary care, 18% for residential care and 16% for residential homes for children.
- 4.16 Respondents were asked the main reasons why non-UK EU staff had left their service over the last year. When interpreting this data, it is important to keep in mind that these are *perceived* reasons for staff departures, as reported by survey respondents (usually managers) rather than staff members themselves, and that the base size for this question is relatively small at 86.
- 4.17 The most common reasons mentioned were to pursue a career change or study (33%), for promotion or a better job (25%) or being unhappy with aspects of their job (20%). Relocation to a non-UK EU country was mentioned by 15% and concerns or uncertainty regarding Brexit mentioned by just 5%.

Figure 4.10: Reasons for Non-UK EU staff departures – social care

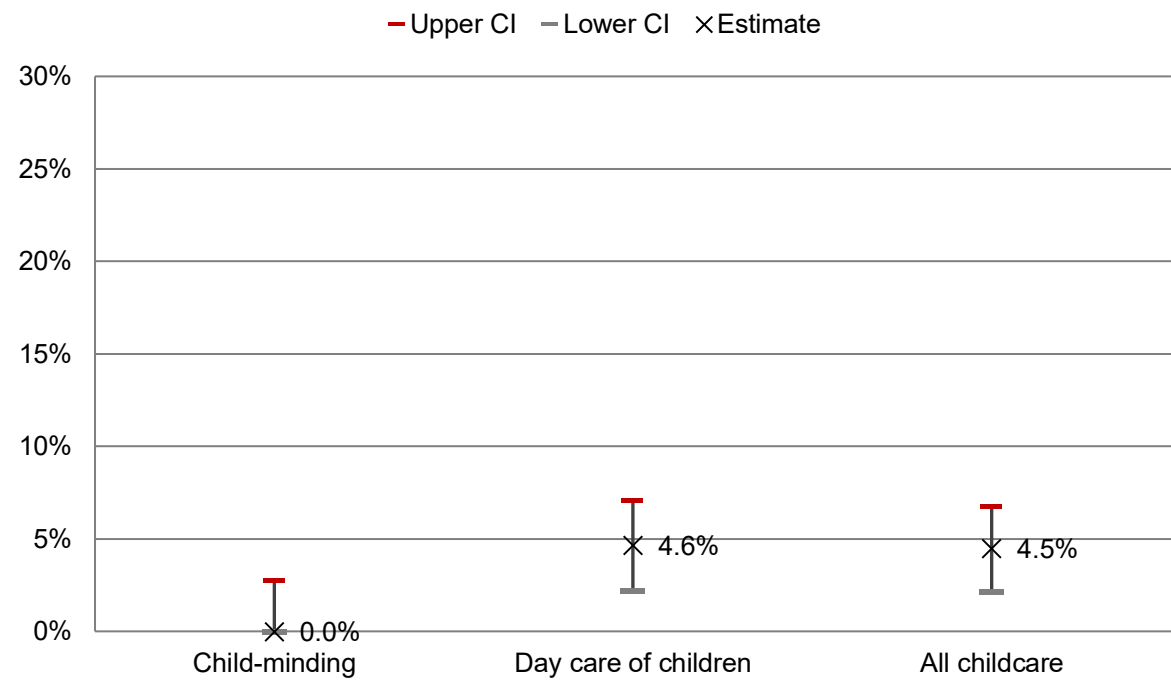


Base: All social care services where any EU staff members have left in last 12 months (86)

5. Childcare: Size of the non-UK EU workforce

- 5.1 An estimated 4.5% of people employed in the childcare sector in Wales are non-UK EU27 nationals. Overall, there are approximately 17,000 people working within childcare in Wales, so this equates to around 760 workers.¹⁴ The lower confidence interval (LCI) of this estimate is 2.4% and the upper confidence interval (UCI) is 6.5%, equating to between 410 and 1,100 workers (Table 5.1).
- 5.2 The prevalence of non-UK EU27 staff within the day care of children services covered by the survey was 4.6% (LCI=2.2%; UCI=7.1%). None of the 108 child-minders interviewed as part of the research were from, or employed someone from, a non-UK EU27 country (Figure 5.1).

Figure 5.1: Estimates of proportion of non-UK EU staff within registered childcare settings



Base: All child-minding (108); Day care of children (249)

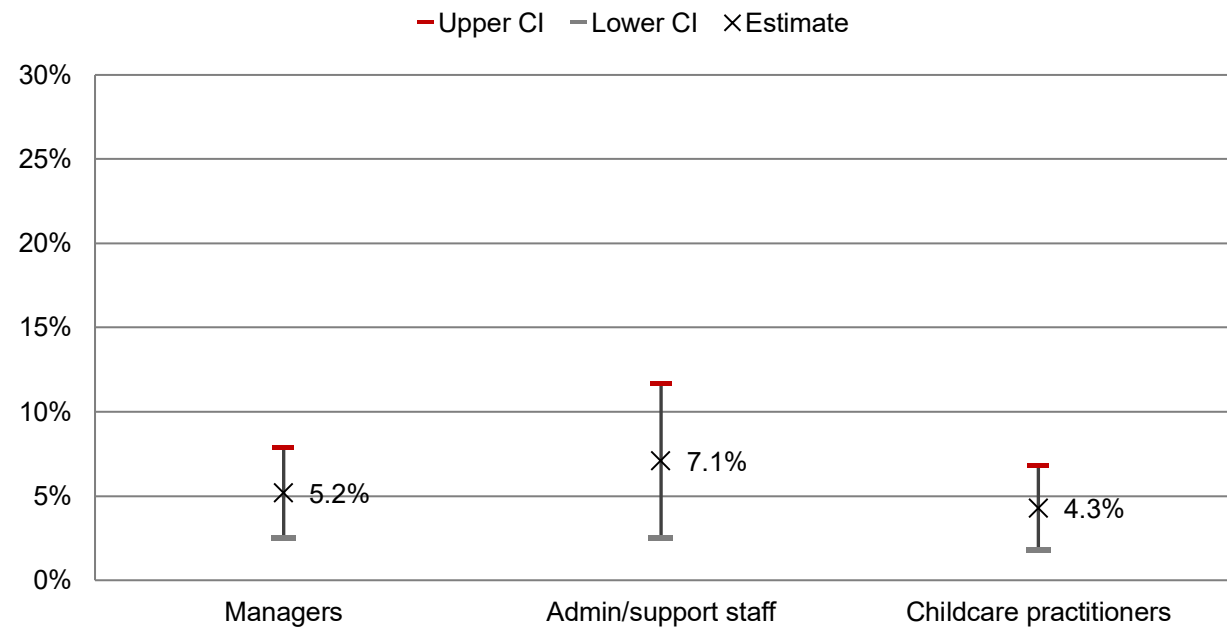
¹⁴ The population data supplied by the Welsh Government and is from the Care Inspectorate Wales Self Assessment of Service Statement: Childcare and Play Services, August 2016.

Table 5.1: Estimates of size of non-UK EU staff within registered childcare settings

| Child-minding / Day care of children | |
|--------------------------------------|--------|
| Population figures | |
| Total services | 4,099 |
| Total staff | 17,000 |
| Survey figures | |
| Total services (unweighted) | 357 |
| Total staff (unweighted) | 3,098 |
| Estimates | |
| % of staff from non-UK EU | 4.5% |
| Total staff from non-UK EU | 760 |
| Confidence intervals | |
| Lower % | 2.4% |
| Upper % | 6.5% |
| Lower estimate | 410 |
| Upper estimate | 1,100 |

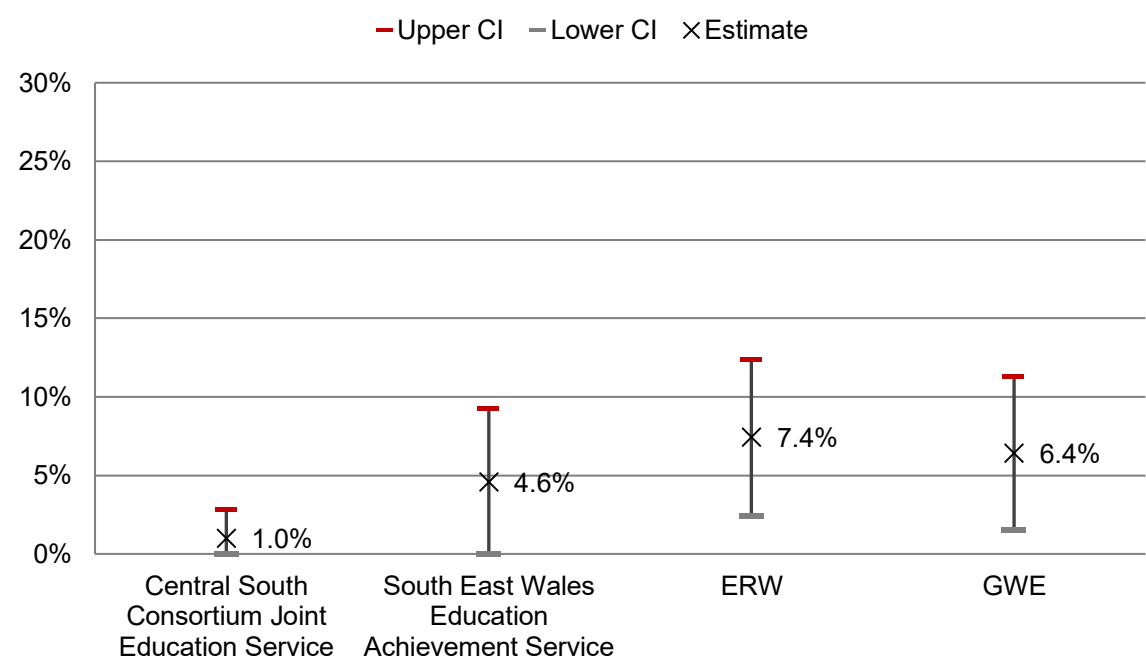
5.3 Figure 5.2 shows variation in the estimated prevalence of non-UK EU childcare staff by staff role and geographic area. As the confidence intervals for different staff groups and geographic areas overlap, caution should be applied in interpreting the actual extent of differences across groups.

Figure 5.2: Estimates by types of staff within registered childcare settings



Base: All childcare services employing - managers (240); admin/support staff (111); childcare practitioners (242)

Figure 5.3: Estimates by education consortia groupings¹⁵ within registered childcare settings



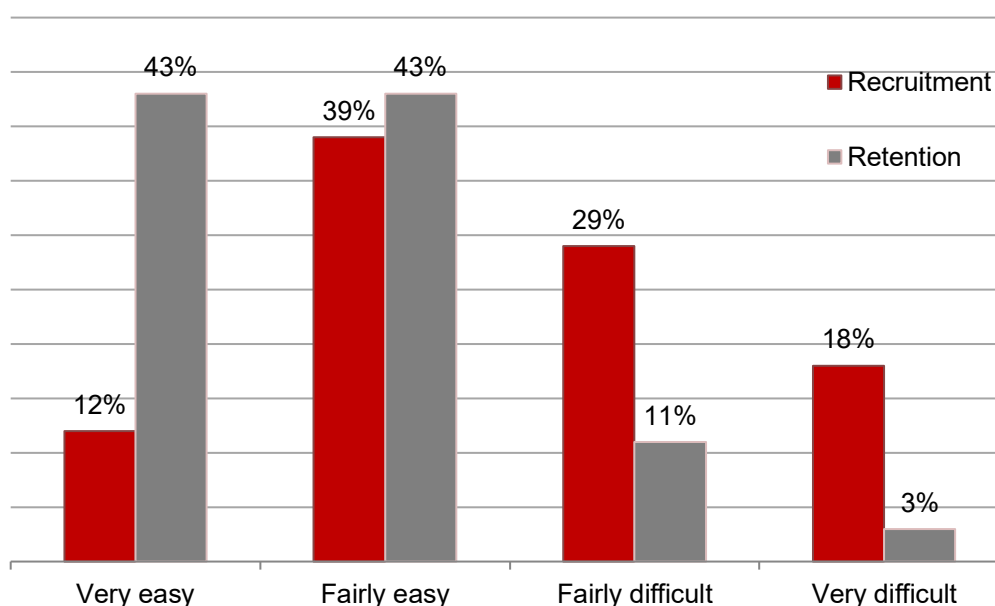
Base: All childcare services in Central South Consortium Joint Education Service (100); South East Wales Education Achievement Service (71) ERW (98); GwE (88)

¹⁵ The sample size did not allow for the results to be presented by local authority. Results have been presented by the four formal education consortia in Wales: Central South Consortium Joint Education Service (Bridgend, Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, Vale of Glamorgan), South East Wales Education Achievement Service (Blaenau Gwent, Caerphilly, Monmouthshire, Newport and Torfaen), ERW (Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys and Swansea), GwE (Conwy, Denbighshire, Flintshire, Gwynedd, Isle of Anglesey, and Wrexham),

6. Childcare: Views on staff retention and recruitment

- 6.1 The survey asked for views on recruitment and retention within childcare, including the extent to which service providers found it easier or more difficult within the last 12 months to recruit and retain non-UK EU workers. The data in this section are based on responses from day care of children services only, as only a small number of child-minders in our sample employed any staff (only 12 out of 108 childminders interviewed employed staff).
- 6.2 The findings indicate that recruitment is currently a challenge for many day care for children services. Almost half (47%) of those who had tried to recruit staff in the last year said they had found recruitment difficult (29% fairly difficult and 18% very difficult - Figure 6.1).
- 6.3 In comparison, retention difficulties were less widespread: 86% said they found staff retention easy (43% 'very' and the same proportion 'fairly easy'). Just 14% said they had found it difficult to retain staff in the last 12 months (11% fairly difficult; 3% very difficult).

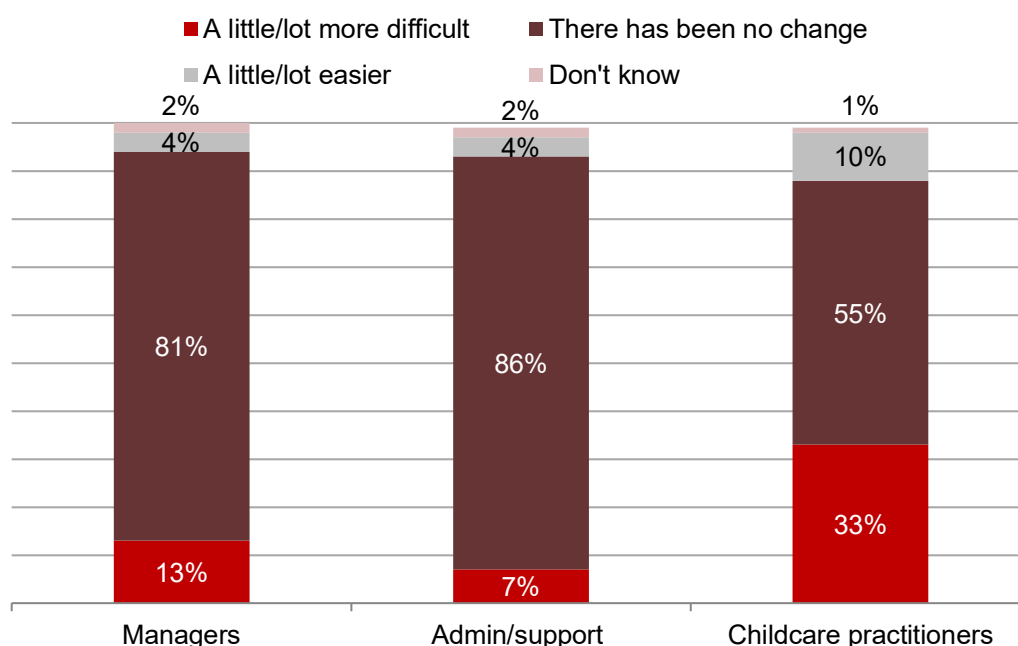
Figure 6.1: Ease of recruitment and retention – day care of children



Bases: Recruitment - all day care of children services who had tried to recruit staff in last 12 months (212). Retention - all day care of children services except those who indicated the question was not applicable (241)

6.4 The results suggest that it has become more difficult to recruit childcare practitioners in particular in the last 12 months (33% said it was more difficult; 16% a lot more difficult and 17% a little more difficult), compared with managers (13%; 8% a lot more difficult; 5% a little more difficult) or administrative/support staff (7%; 6% a lot more difficult; 1% a little more difficult – Figure 6.2).

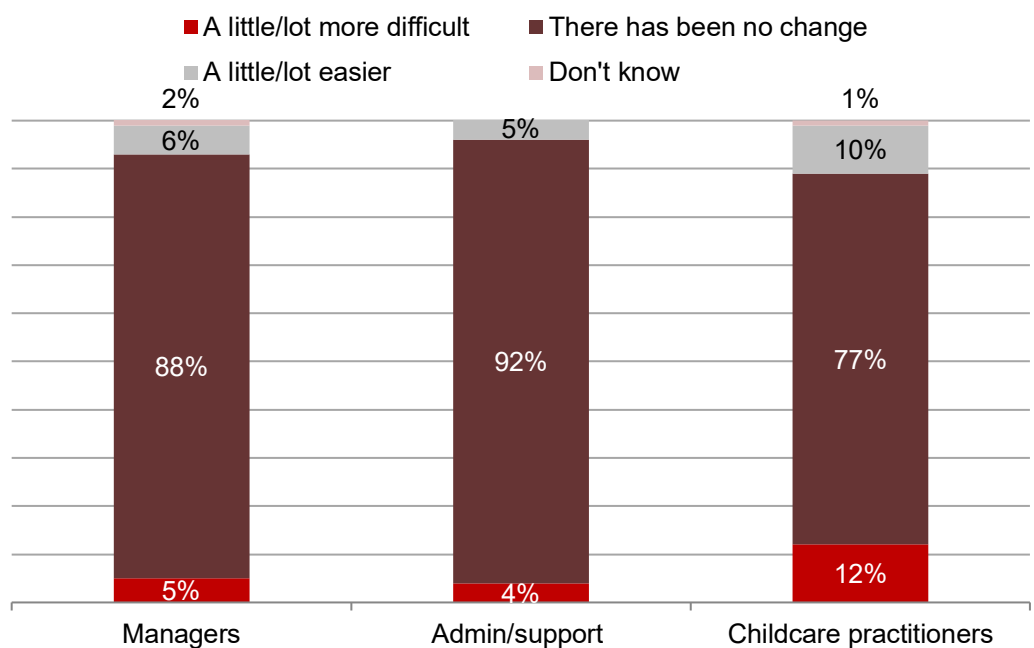
Figure 6.2: Ease of recruitment by staff group – day care of children



Base: All day care of children services who have tried to recruit to this staff group in the last 12 months - managers (150); admin/support staff (81); childcare practitioners (195)

6.5 There were fewer clear patterns in perceived ease or difficulty of retaining different types of childcare staff. Over 1 in 10 (12%) day care of children services said they had found it difficult to retain childcare practitioners within the last 12 months (3% a lot more difficult; 9% a little more difficult). However, 10% also said they found it *easier* to retain this group (2% a lot easier; 8% a little easier). Almost nine in ten said there had been no change in the difficulty of retaining managers (88%) and administrative/support staff (92%).

Figure 6.3: Ease of retaining by staff group – day care of children

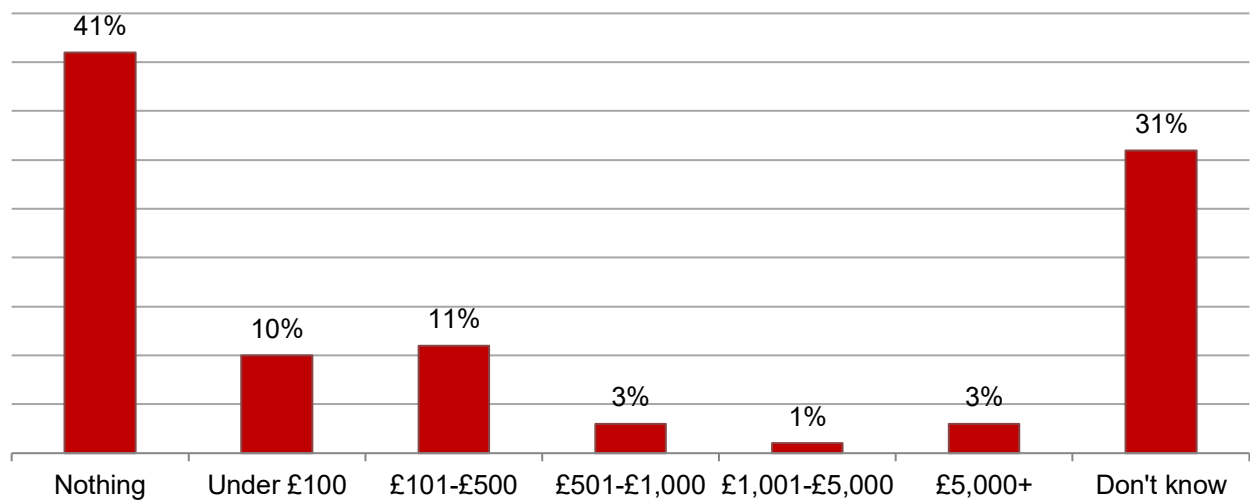


Base: All day care of children services who employ staff in this category and gave a response - managers (225); admin/support staff (107); childcare practitioners (234)

Cost of recruitment

6.6 A high proportion (31%) of day care of children providers were unable to estimate recruitment costs, while 41% said they had not spent anything on recruitment (although they had recruited within the last year). Among the remaining respondents, spend was relatively low, with over a fifth (21%) spending under £500 (Figure 6.4).

Figure 6.4: Cost of recruitment – day care of children

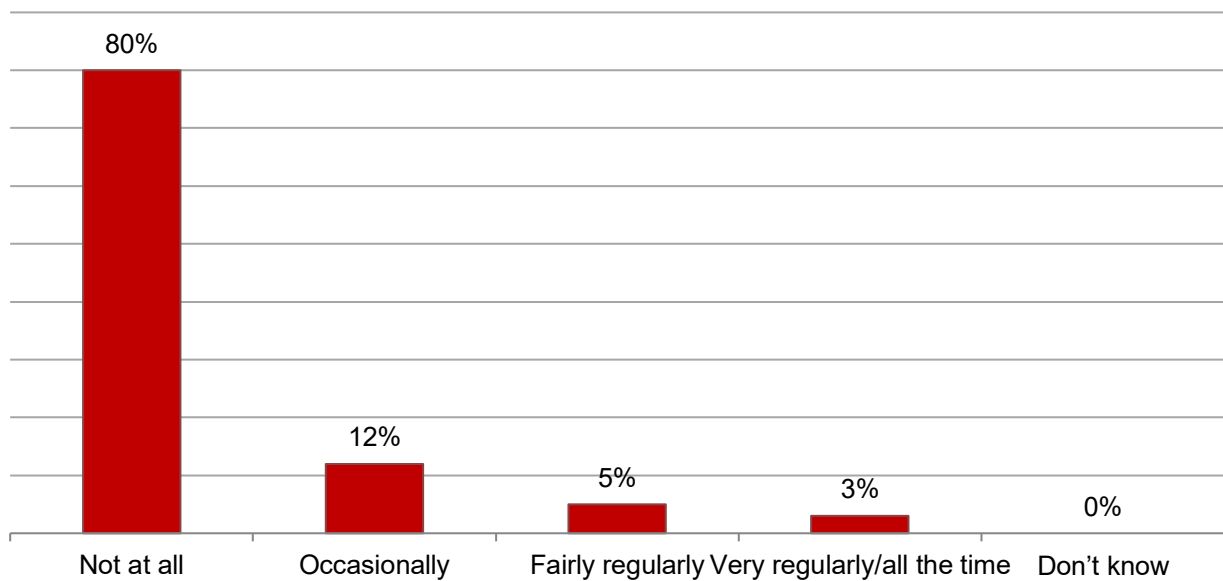


Base: All day care of children services that had tried to recruit in last 12 months (212)

Supply or agency staff

6.7 Four in five (80%) said they had not used supply or agency staff within the last 12 months, while 12% had used them occasionally, 5% fairly regularly and 3% very regularly or all the time.

Figure 6.5: Use of supply or agency staff – day care of children

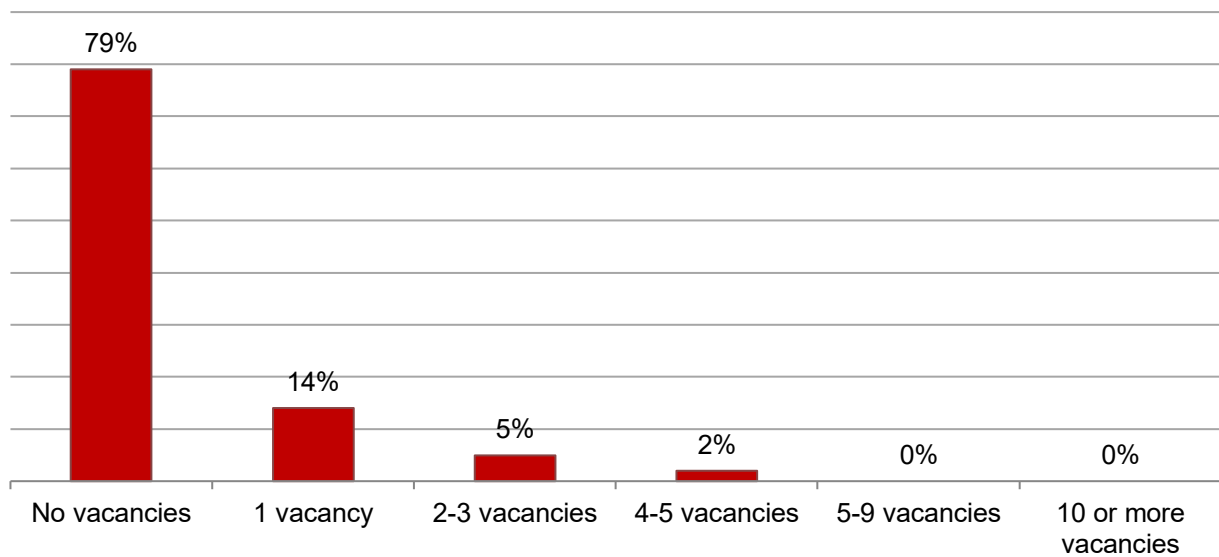


Base: All Day care of children services (249)

Staff vacancies

6.8 Four in five (79%) of day care of children providers said they had no staff vacancies at the time of the survey (late 2018/early 2019). Those that did have vacancies tended not to have many: 14% had just one vacancy.

Figure 6.6: Staff vacancies – day care of children

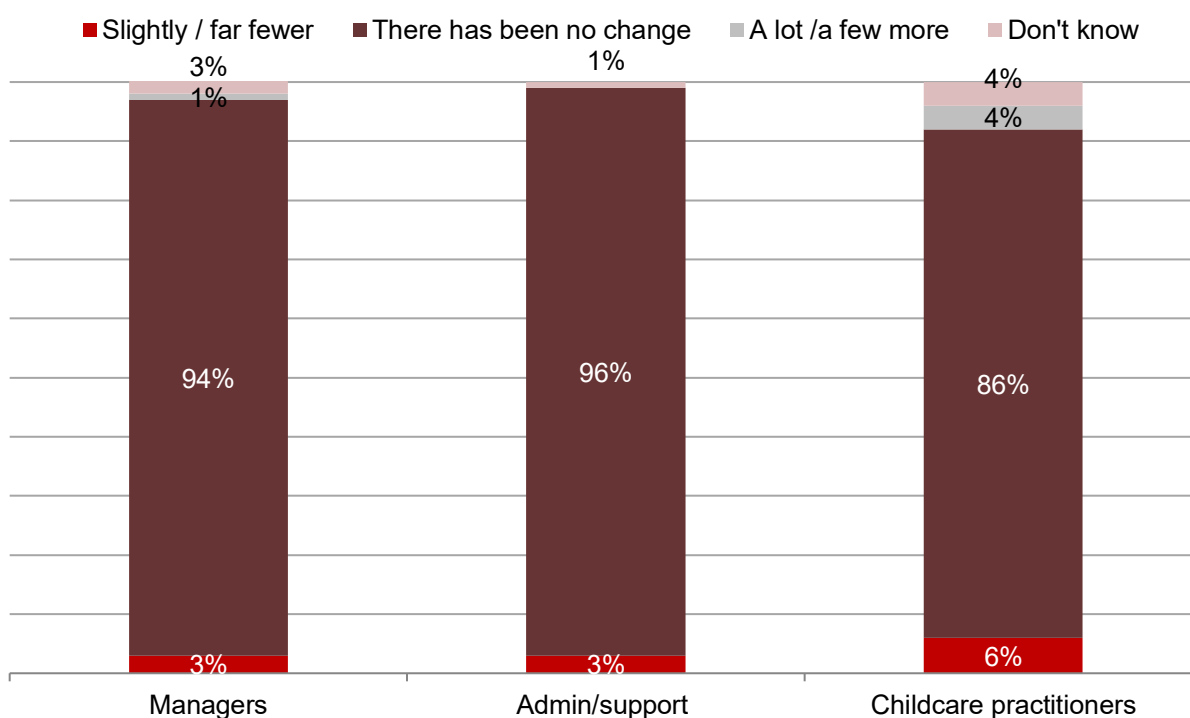


Base: All Day care of children services (245)

Recruitment and retention of non-UK EU workers

6.9 Day care of children respondents reported little change in the volume of applications received from non-UK EU workers within the last 12 months (Figure 6.6). Almost all respondents said there had been no change in the volume of applications from EU nationals for administrative or support roles (96%) or manager roles (94%), while 86% said the same with respect to childcare practitioner roles.

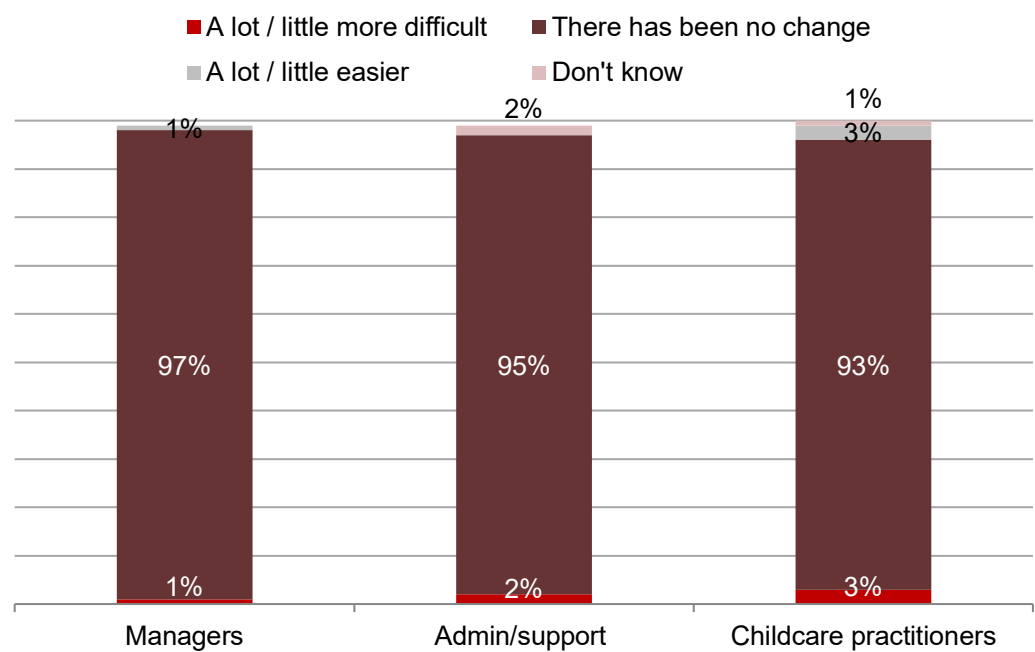
Figure 6.7: Applications from non-UK EU workers – day care of children



Base: All day care of children services who have tried to recruit - managers (160); admin/support (76); childcare practitioners (192)

6.10 Similarly, the vast majority of day care of children services interviewed reported no change in the ease of retaining non-UK EU staff within the last 12 months (Figure 6.8). Just 6% said they had at least one non-UK EU staff leave within the last year.

Figure 6.8: Retention of non-UK EU workers – day care of children



Base: All day care of children services who have EU27 staff in role within last 12 months - managers (68); admin/support (72); childcare practitioners (41)

7. Childcare: Maximum registered capacity, waiting lists and qualifications

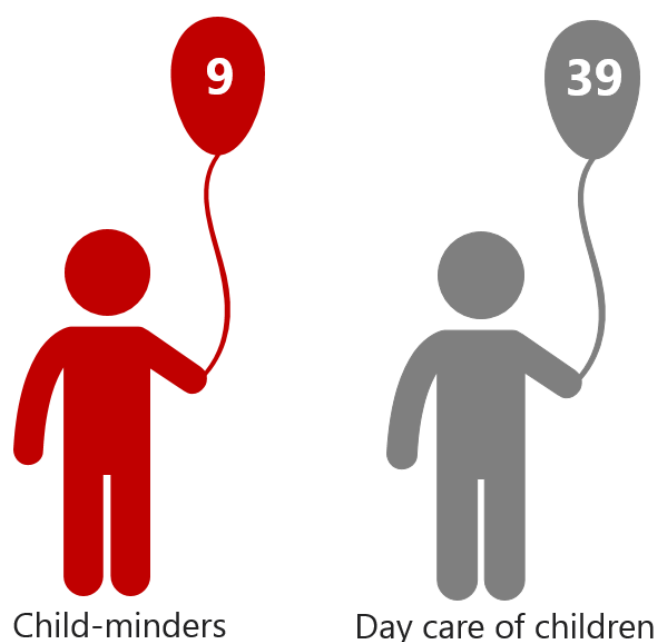
7.1 Childcare respondents, both child-minders and day care for children, were asked a small number of questions about their maximum registered capacity, waiting lists and staff qualifications, to inform wider Welsh Government policy and planning.

Maximum registered capacity

7.2 The mean maximum registered capacity of child-minders was 9. Ten per cent had a maximum registered capacity of 5 or less, whilst 28% said this was 6-7, 10% said 8-9, 45% said 10-11 and 6% said more than 11.

7.3 The mean maximum registered capacity for day care of children was 39. Twenty-three per cent said their maximum registered capacity was less than 20, 27% said between 20 and 29, 16% said between 30 and 39, and 33% said 50 or more.

Figure 7.1: Mean maximum registered capacity - childcare

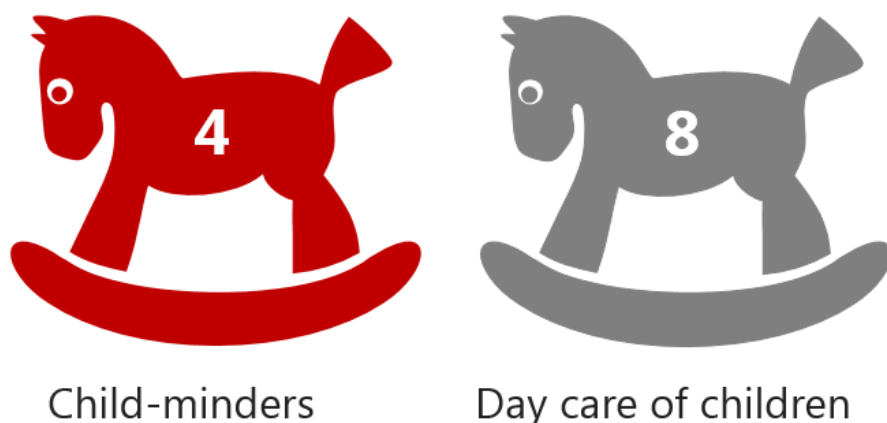


Base: All child-minders (108); day care of children (248)

Waiting lists

- 7.4 Thirty-two per cent of childminders and 37% of day care of children services said they currently had a waiting list of children wanting a space starting immediately. The mean number of children waiting for a place with those childminders who had a waiting list was 4, while day care of children services had an average of 8 children waiting for a place.

Figure 7.2: Waiting lists - childcare

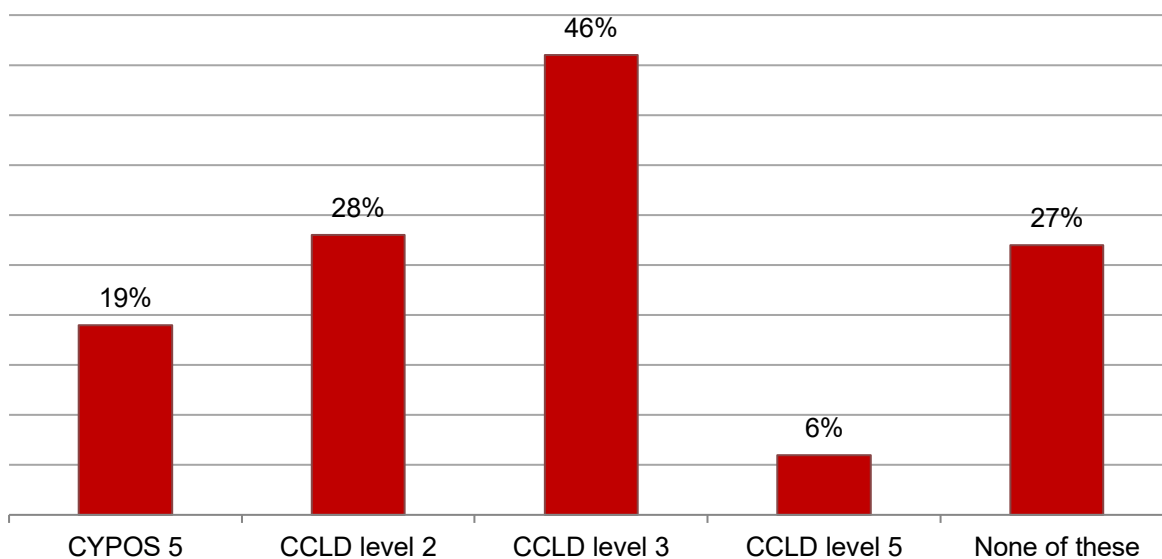


Base: All those who have a wait list: child-minders (33); day care of children (66)

Qualifications

- 7.5 Child-minders were asked which of a number of childcare qualifications they hold. Almost a fifth (19%) said they had CYPOS 5, while 28% had Childhood, Care, Learning and Development qualification (CCLD) level 2, almost half (46%) had CCLD level 3 and 6% had CCLD level 5. Twenty-seven per cent said they did not hold any of these qualifications (Figure 7.3).

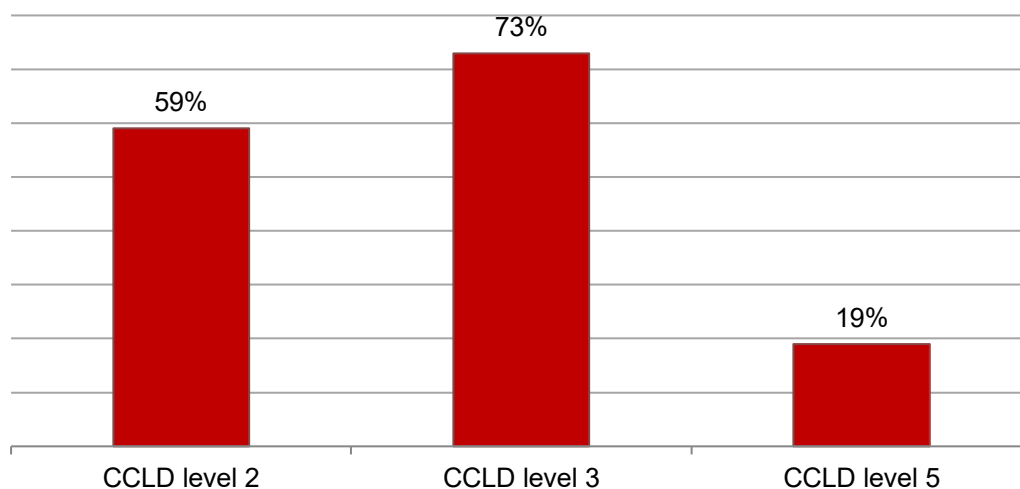
Figure 7.3: Qualifications amongst child-minders



Base: All child-minders (108)

7.6 Day care of children respondents were asked how many staff at their service had CCLD level 2, CCLD level 3 and CCLD level 5. Figure 7.4 presents this data as a percentage of managers and childcare practitioners – the groups most likely to be eligible to study for these qualifications. The survey found that over half (59%) of managers and childcare practitioners within this subsector have CCLD level 2, while almost three quarters (73%) have CCLD level 3 and a fifth (19%) CCLD level 5.

Figure 7.4: Qualifications within day care of children



Base: All day care of children (249)

8. Summary and conclusions

- 8.1 An estimated 6.4% of staff within registered social care services and 4.5% of staff within registered childcare services in Wales are non-UK EU nationals. This equates to between around 2,060 to 3,730 social care workers, and between approximately 410 and 1,100 childcare workers.
- 8.2 The survey highlighted general difficulties recruiting staff within both social care and childcare, with 58% of registered social care respondents and 47% of day care of children respondents saying they found it difficult to recruit within the last year.
- 8.3 Within social care, these challenges are most likely to be acute within domiciliary care, and when recruiting NMC registered nurses and health and social care practitioners. Within childcare, it is the recruitment of childcare practitioners (rather than administrative/support staff or managers) that poses the biggest challenge.
- 8.4 Retention issues were less widespread, but still reported by a substantial minority of registered social care services (26%). Similar proportions of day care of children services reported having found staff retention easier (10%) and more difficult (12%) in the last year. Again, retention issues were most acute with respect to NMC registered nurses within social care and (to a lesser extent) childcare practitioners within day care of children services.
- 8.5 There was relatively little reported change in either sector in the level of job applications from EU27 workers over the last 12 months, or the ease or difficulty of retaining staff from non-UK EU27 countries. However, again registered social care services were slightly more likely to report challenges recruiting and retaining NMC registered nurses from EU27 countries.
- 8.6 Moreover, when viewed against the broader context of staffing challenges in the social and childcare sectors, any impact of Brexit in terms of the rights or propensity of non-UK EU nationals to remain in the UK has the potential to exacerbate existing recruitment challenges for the sector.

Reference section

Ipsos MORI. (2018). *The Contribution of Non-UK EU Workers in the Social Care Workforce in Scotland* [online]. Edinburgh: Scottish Government. Available from:

<https://www.gov.scot/publications/contribution-non-uk-eu-workers-social-care-workforce-scotland/> [Accessed 13 February 2019]

Welsh Government. (2017-2018). *Staff of local authority social services departments by local authority and post title (2014-15 onwards)* [online]. Stats Wales. Available at:

<https://statswales.gov.wales/Catalogue/Health-and-Social-Care/Social-Services/Staffing/staffoflocalauthoritiesocialservicesdepartments-by-localauthority-posttitle>
[Accessed 13 February 2019].

Annex A: Questionnaire

Blue text = routing instructions/notes for scripter

ONLINE EMAIL INVITATION TEXT

Share your experiences of staffing!

Dear [text substitution name],

We would like to invite you to participate in an important survey we are conducting on behalf of the **Welsh Government** about **staffing in the social care and childcare sector**.

What is this about and why should I take part?

The Welsh Government and its partners want to understand more about the numbers and types of staff working in the social care and childcare sector, including the current contribution of non-UK EU workers. The findings will help them to understand the potential challenges you face and to develop responses to help support the sector, so it is **really important that we hear from as many services** as possible.

We are contacting care services listed in the Care Inspectorate Wales's database of providers. This survey is endorsed by the Royal College of Nursing, UK Home Care Association, Care Forum Wales and Social Care Wales.

What is involved?

Taking part is easy – all you need to do is go to <https://ipsos.uk/welsheu27>

and enter this unique login - **<ID>**.. The survey should only take around 5-10 minutes to complete.

In the survey, I specifically want to ask you about the **<servicesector>** provided by/at **<servicename>** only.

SCRIPTING INSTRUCTION DUPLICATE FLAG (SAMPLE COLUMN X): We recognise that your organisation may also provide other services but we want you to focus on the **<servicesector>** provided by/at **<servicename>** only when answering this survey.

The questions include the total number of people employed at this service, the numbers performing different functions and the number that have left over the last year. You may find it helpful to have this information to hand when you complete the survey. However, you will be able to pause the survey at any point and go back to it later (via the link above,) should you need to do so. There is also an option to forward this survey to the most relevant person at your service to complete (e.g. a manager or HR professional).

The final deadline for completing the survey is 16th January 2019.

How will my answers be used?

Individual responses will be **completely confidential** and will not be seen by anybody outside of Ipsos MORI. It will **not** be possible to identify any individuals or organisations from the results – only aggregated statistics will be reported. All your data (survey responses) will be **securely stored by Ipsos MORI** in accordance with the General Data Protection Regulation (GDPR). On publication of the report (expected by Spring 2019) all survey responses will be destroyed. The Welsh Government is commissioning this research under the legal basis of ‘public task’.

If you have any questions or would like any further information regarding the survey please do not hesitate to contact the research team at Ipsos MORI by emailing

WalesSCCsurvey@ipsos.com or telephoning **0808 238 5376**, or the project manager at the Welsh Government, Faye Gracey on 03000 257 459. If you would like to review the Privacy Notice for this study, this is available at:

https://images1.ipsosinteractive.com/images/UK/UK1807629201MMWELSH_EU27_Social_Care_Workers/docs/privacy.pdf

Many thanks for your time,

Linda Hutcheson

Project Manager, Ipsos MORI

Linda.hutcheson@ipsos.com, 0131 240 3262

TELEPHONE SURVEY INTRO SCREENS

May I speak with [manager name]?

S1. IS THE RESPONDENT THE NAMED CONTACT FROM THE SAMPLE?

| | |
|-----|-------------|
| Yes | Go to INTRO |
| No | Go to S2 |

S2. I need to speak with the manager at the <<servicesector> provided by/at <servicename>. Are they available?

| | |
|---|--------------------|
| Yes – RESPONDENT IS THE BEST PERSON TO SPEAK TO | Go to intro |
| Yes – ASK TO BE TRANSFERRED TO THE MANAGER | Go to intro |
| No – SCHEDULE AN APPOINTMENT TO CALL THEM BACK | Appointment Screen |

INTRO

Good morning/afternoon/evening. My name is and I am calling from Ipsos MORI, the independent research organisation. We are conducting an important survey on behalf of the Welsh Government about staffing in the social care and childcare sectors. Would you like to speak to us in Welsh or English?

The aim is to understand more about the numbers and types of staff working in these services, including the current contribution of non-UK EU workers. The research will enable the Welsh Government and its partners who plan, commission and provide social care services to identify the scale and nature of the potential challenge care providers may face, both now and in the future, particularly as a result of the UK's decision to leave the EU, and to develop appropriate responses.

The survey will only take about 5-10 minutes to complete.

S2b. Would you prefer to complete the survey in Welsh or English?

| | |
|---------|---|
| Welsh | Route to appointment screen for Welsh interviewer |
| English | Continue |

TEXT FOR APPOINTMENT SCREEN:

I will make an appointment for a Welsh speaking interviewer to call you back as soon as possible.

CONTINUING INTERVIEW:

In the survey, I specifically want to ask you about the <servicesector> provided by/at <servicename> only.

The questions include the total number of people employed at this service, the numbers performing different functions and the number that have left over the last year. You may find it helpful to have this information to hand as we go through the survey.

Please be assured that individual responses will be completely confidential and will not be seen by anybody outside of Ipsos MORI. It will not be possible to identify any individuals or organisations from the results as these will be reported in the form of aggregated statistics. All your data will be securely stored by Ipsos MORI in accordance with GDPR and destroyed after this project is completed.

If you have any questions, or would like any further information about the survey, please do not hesitate to contact the research team at Ipsos MORI by emailing WalesSCCSurvey@ipsos.com or telephoning 0808 238 5376, or the project manager at the Welsh Government, Faye Gracey on 03000 257 459. If you would like to review the Privacy Notice for this study, this is available online (read out address if required: https://images1.ipsosinteractive.com/images/UK/UK1807629201MMWELSH_EU27_Social_Care_Workers/docs/privacy.pdf).

S3. Are you able to take part in the survey right now?

If you don't have the information to hand to take part in the survey right now, I can schedule an appointment to call you back at a later date/time in the next few weeks. We can also

send you an email with a link to the online survey so you can complete it at a time that is suitable for you?

| | |
|-------------------------|--------------------|
| Continue | Go to S4 |
| Make appointment | Appointment screen |
| Send online survey link | Send email |
| Refused | Thank and close |

S4. Before we start, I just want to clarify that participation in the survey is voluntary and you can change your mind at any time. Are you happy to proceed with the interview? IF NECESSARY: If you would like to read the Privacy Notice beforehand you

can access it online at

<https://images1.ipsosinteractive.com/images/UK/UK1807629201MMWELSH_EU27_Social_Care_Workers/docs/privacy.pdf>

| | |
|---|-----------------|
| Yes, happy to continue | Go to Q1 |
| No, not happy to continue | Thank and close |
| Requires further information/wants to review privacy notice | Send email |

ONLINE SURVEY INTRO SCREENS

[OPENING SCREEN OF ONLINE SURVEY]

Thank you for logging on to this survey. Your participation is very much appreciated.

S5. Would you prefer to complete the survey in Welsh or English?

| | |
|---------|--------------------------|
| Welsh | Route to Welsh version |
| English | Route to English version |

Please be assured that all the information you provide will be kept in the strictest confidence and used for research purposes only. It will not be possible to identify any particular individual or organisation in the results as these will be reported in the form of aggregated statistics. If you would like to read the study Privacy Notice, you can access it online at <https://images1.ipsosinteractive.com/images/UK/UK1807629201MMWELSH_EU27_Social_Care_Workers/docs/privacy.pdf>

[NEXT SCREEN]

Just a reminder that the survey asks about the <servicesector> provided by/at <servicename> so please answer in relation to this service only. The survey should take around 5-10 minutes to complete. You can leave the questionnaire at any time and return to it later by clicking on the link in the e-mail sent to you. However, please complete it in full by the **16th January 2019**.

Please complete **all questions** to the best of your knowledge - remember you will be able to pause the survey at any point and go back to it later should you need to do so (via the unique link in the email or letter we sent you). You can also forward the survey link to someone else at your service if you feel they are better placed to answer the questions.

[NEXT SCREEN]

S6. Before you start, just to remind you that participation in the survey is voluntary and you can change your mind at any time. Are you happy to continue?

| | |
|-----|-----------------|
| Yes | Go to Q1 |
| No | Thank and close |

SAMPLE CONTENT (FOR QUOTAS/ROUTING/TEXTFILLS)

Service type (field = <servicequota>)

1. Domiciliary care service
2. Residential care home for adults/children
3. Childminding service
4. Day care for children service

Service type textfill (field = <servicesector>)

1. Domiciliary care service
2. Residential care service
3. Residential home for children
4. Childminding service
5. Day care for children service

Name of service (field = <servicename>)

Name of service manager (field = <managename>)

Regional Partnership Board (field = <Region>)

1. North Wales
2. Powys
3. West Wales
4. Western Bay
5. Cwm Taf
6. Gwent
7. Cardiff and Vale

Organisation type (field in sample = <Org type>)

1. Public
2. Private
3. Voluntary
4. Unknown

MAIN SURVEY CONTENT (TELEPHONE AND ONLINE)

ASK ALL

Q1. Which of the following best describes your role in the <servicesector> provided by/at <servicename>?

ASK ALL

Single code

Please select one answer only

| | |
|---|---|
| Manager (including Service/Home Manager) – including: unit/project managers, group managers/directors, assistant managers | 1 |
| Administrative/support staff member – including: clerical, finance and HR and ancillary staff (e.g. catering, domestic, gardening) | 2 |
| Childcare Practitioner - including: childminders, day care managers/supervisors, sessional care supervisors, room supervisors or team leaders, nursery nurse assistants, and out of school childcare practitioners | 3 |
| NMC Registered Nurse | 4 |
| Social care or healthcare practitioner (except NMC Registered nurses) – including: social workers, care assistants, care workers, care officers, care co-ordinators, senior care workers, occupational therapists, health care support workers | 5 |
| Other (please write in) | 6 |

ASK IF SERVICESECTOR = 1, 2, OR 3 (I.E. NOT CHILDMINDERS OR DAY CARE FOR CHILDREN)

| | | |
|------------|---|---|
| Q1b | Can I just check, is <servicename> private sector, public sector or a voluntary sector business/service? | |
| | Private sector | 1 |
| | Public sector | 2 |
| | Voluntary sector | 3 |
| | Don't know | 4 |

ASK ALL

| | |
|--|---|
| Q2. Are you a.....? ASK ALL Single code | |
| UK national | 1 |
| Irish national (from the Republic of Ireland) | 2 |
| Other EU national (From Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain or Sweden) | 3 |
| Other national | 4 |
| Don't know | 5 |

QUESTION FOR BOTH CHILDMINDERS AND OTHER CHILDCARE PROVIDERS

ASK IF <careservice> = 4 OR 5. ALL OTHERS, SKIP TO Q14

Q3. What is the maximum registered capacity of your childcare service? That is, the total number of children you are registered to take at any one time.

Single Code

Please enter the number here

Don't know

Q4. Do you currently have a waiting list of children wanting a space starting now in your <servicesector>? (Please exclude children who are on a waiting list for a space to start at a future date – e.g. next school year)

Single code

| | | |
|--|------------|---|
| | Yes | 1 |
| | No | 2 |
| | Don't know | 3 |

ASK IF CODE 1, YES, AT Q4

Q5. If yes, approximately how many children are waiting for a space to become available now (not including those waiting to start in the future)?

Single Code

Please enter the number here

Don't know

QUESTIONS FOR CHILDMINDERS ONLY

ASK IF <careservice> = 4 (childminder). ALL OTHERS, SKIP TO Q14

| Q5a. Which of the following qualifications do you have? Multicode | | | |
|--|-----|------|----|
| A CYPOS 5 qualification | Yes | No | DK |
| Childhood, Care, Learning and Development qualification at level 2 | Yes | No | DK |
| Childhood, Care, Learning and Development qualification at level 3 | Yes | No | DK |
| Childhood, Care, Learning and Development qualification at level 5 | Yes | No | DK |
| None of these qualifications | | NONE | DK |

| | |
|--|---|
| Q6. Do you employ any staff other than yourself? ASK ALL Single code <i>Please select once answer only</i> | |
| Yes | 1 |
| No | 2 |
| Don't know | 3 |

ASK IF ANSWERED YES AT Q6 (i.e. do employ staff other than self). OTHERS, SKIP TO Q29

| | | | |
|--|--|------|----|
| Q7. How many staff currently working in your childminding service are....? Multicode | | | |
| a. UK nationals | | NONE | DK |
| b. EU nationals (From Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain or Sweden) | | NONE | DK |

ASK IF NUMERIC RESPONSE =1 AT Q7b (i.e. 1 EU staff). OTHERS, SKIP TO Q9

| | |
|---|---|
| Q8a. You said that you have 1 EU national staff member. Are they from the Republic of Ireland? | |
| Yes | 1 |
| No | 2 |
| Don't know | 3 |

ASK IF NUMERIC RESPONSE >1 AT Q7b (i.e. 2+ EU staff). OTHERS, SKIP TO Q9

| |
|---|
| <p>Q8b. You said that you have [NUMERIC RESPONSE FROM Q4b] EU national staff. How many of these are from the Republic of Ireland?</p> <p>Single code</p> <p><i>Please enter number below</i></p> <p>NONE</p> <p>DON'T KNOW</p> |
|---|

SCRIPTING: SOFT CHECK TO APPEAR IF TOTAL AT Q8b IS > THAN TOTAL AT Q7b

Can you just confirm that <ENTER VALUE GIVEN AT Q8b> is the total number of staff from the Republic of Ireland currently employed at your childminding service?

If yes, click on NEXT

If no, 'Please enter the correct number of staff from the Republic of Ireland'.

ASK IF ANSWERED YES AT Q6 (DO EMPLOY STAFF).

| | | |
|-----------|--|---|
| Q9 | In the last 12 months, have you found it easier or more difficult to <u>recruit</u> staff than previously, or has there been no change? Single code <i>Please select one answer only</i> | |
| | A lot easier | 1 |
| | A little easier | 2 |
| | There has been no change | 3 |
| | A little more difficult | 4 |
| | A lot more difficult | 5 |
| | Don't know | 6 |
| | Not applicable – have not tried to recruit in the last 12 months | 7 |

| | | |
|------------|--|---|
| Q10 | And in the last 12 months, have you found it easier or more difficult to <u>retain</u> staff than previously or has there been no change? Single code <i>Please select one answer only</i> | |
| | A lot easier | 1 |
| | A little easier | 2 |
| | There has been no change | 3 |
| | A little more difficult | 4 |
| | A lot more difficult | 5 |
| | Don't know | 6 |
| | Not applicable | 7 |

ASK IF ANSWERED YES AT Q6 (DO EMPLOY STAFF).

| | | |
|------------|---|---|
| Q11 | Over the last 12 months, have you received more or fewer applications from EU nationals (including the Republic of Ireland but <u>excluding</u> the UK), or has there been no change? Single code <i>Please select one answer only.</i> | |
| | A lot more | 1 |
| | A little more | 2 |
| | There has been no change | 3 |
| | Slightly fewer | 4 |
| | Far fewer | 5 |
| | Don't know | 6 |
| | Not applicable | 7 |

| | | |
|------------|--|---|
| Q12 | <p>And have you found it easier or more difficult to <u>retain</u> workers from the EU (including the Republic of Ireland but <u>excluding</u> the UK) in the last 12 months or has there been no change?</p> <p>If you have not had any EU staff in the last 12 months, please code as ‘Not applicable’.</p> <p>Single code</p> <p><i>Please select one answer only.</i></p> | |
| | A lot easier | 1 |
| | A little easier | 2 |
| | There has been no change | 3 |
| | A little more difficult | 4 |
| | A lot more difficult | 5 |
| | Don't know | 6 |
| | Not applicable – have not had any EU staff/workers in last 12 months | 7 |

| | |
|--|--|
| <p>Q13. How many workers/staff from the EU, if any, have chosen to leave your childminding service in the last 12 months? Again, please include staff from the Republic of Ireland but <u>exclude</u> those from the UK.</p> <p>If you have not had any EU staff in the last 12 months, please code as ‘Not applicable’.</p> <p>Single code</p> | |
| | <p><i>Please enter the number here</i></p> <p>NONE</p> <p>DON'T KNOW</p> <p>NOT APPLICABLE – have not had any EU staff/workers in last 12 months</p> |

QUESTIONS FOR ORGANISATIONS OTHER THAN CHILDMINDERS

ASK IF <careservice> = 1, 2, 3 OR 5. IF CARE SERVICE = 4, SKIP TO ROUTING BEFORE Q28.

Q14 In total, how many staff are currently employed at the <servicesector> provided by/at <servicename>? Please include yourself and both full and part time employees on your payroll at your service, and any working proprietors or owners. You should include casual, relief, (including non-guaranteed hours) and agency staff working for you at the time of your response, but please do not include any external staff from nursing agencies (if you use these).

Single code

Please enter the number here

Don't know

Q15 And how many <STAFFGROUP> are currently employed at your <servicesector>? You should include casual, relief, (including non-guaranteed hours) and agency staff working for you at the time of your response, but please do not include any external staff from nursing agencies (where you use nursing agencies) As above, please include yourself and both full- and part-time staff in these numbers.

Remember, you can pause the survey and come back to it once you have the information required to answer this question. If you are not able to get this information within the survey period, please provide your best estimate.

ONLINE ONLY: To pause the survey, just close your browser. You can reopen it using the unique link in the letter or email we sent you when you are ready.

| | | | | | |
|--|--|--|------|------------|----------------|
| | CATI: If necessary, make an appointment to call back. | | | | |
| | Managers | | NONE | Don't know | Not applicable |
| | Administrative/support staff | | NONE | Don't know | Not applicable |
| | Childcare Practitioners | | NONE | Don't know | Not applicable |
| | NMC Registered nurses | | NONE | Don't know | Not applicable |
| | Social care or healthcare practitioners (except NMC registered nurse) | | NONE | Don't know | Not applicable |
| | Other staff | | NONE | Don't know | Not applicable |

SCRIPTING: SOFT CHECK IF BREAKDOWN OF STAFF AT Q15 DOES NOT EQUAL THE TOTAL NUMBER OF STAFF AT Q14

Can you just confirm that you have [*textfill number and staff group for each staff group mentioned at Q15*] employed at your <servicesector>?

Yes - correct

No – please check

LOOP - ASK FOR EACH OF THE CATEGORIES OF STAFF WHERE RESPONSE >0 GIVEN AT Q15

| | | | | | |
|------------|---|--------|------|------------|----------------|
| Q16 | <p>You said that you have [NUMBER] [STAFF GROUPING FROM Q15]. How many of these are from:</p> <p>a) The EU (from Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden?</p> <p>ONLINE INSTRUCTION IF RESPONDENT SELECTS ‘DON’T KNOW’ - Remember you can pause the survey (by closing your browser) and come back to it, using the unique link in the letter or email we sent you, once you have the information required to answer this question. If you are not able to get this information within the survey period, please provide your best estimate.</p> <p>CATI INSTRUCTION IF RESPONDENT SELECTS ‘DON’T KNOW’ - We can resume the interview at a later/date time to give you the opportunity to obtain this information. If you are not able to get this information within the survey period, please provide your best estimate.</p> | | | | |
| | | The EU | None | Don't know | Not applicable |
| | Managers | | | | |
| | Administrative / support staff | | | | |
| | Childcare practitioners | | | | |
| | NMC Registered nurses | | | | |
| | Social or health care practitioners (except NMC registered nurses) | | | | |
| | Other staff | | | | |

SCRIPTING: SOFT CHECK TO APPEAR IF TOTAL AT Q16 FOR ANY GIVEN STAFF GROUP IS > THAN TOTAL GIVEN FOR THAT STAFF GROUP AT Q15.

Can you just confirm that <ENTER VALUE GIVEN AT Q16> is the total number of [STAFF GROUPING] from the EU currently employed at your service?

Yes – correct

No – please check

LOOP - ASK FOR EACH OF THE CATEGORIES OF STAFF WHERE >0 EU NATIONAL STAFF AT Q16

| | | | | |
|------------|--|---------------------|------|------------|
| Q17 | <p>You said that you have [NUMBER] [STAFF GROUPING] who are EU nationals. How many of these are from the Republic of Ireland?</p> <p>ONLINE INSTRUCTION IF RESPONDENT SELECTS ‘DON’T KNOW’ - Remember you can pause the survey (by closing your browser) and come back to it, using the unique link in the letter or email we sent you, once you have the information required to answer this question. If you are not able to get this information within the survey period, please provide your best estimate.</p> <p>CATI INSTRUCTION IF RESPONDENT SELECTS ‘DON’T KNOW’ - We can resume the interview at a later/date time to give you the opportunity to obtain this information. If you are not able to get this information within the survey period, please provide your best estimate.</p> | | | |
| | | Republic of Ireland | None | Don't know |
| | Managers | | | |
| | Administrative/support staff | | | |
| | Childcare practitioners | | | |
| | NMC Registered nurses | | | |
| | Social or healthcare practitioners (except NMC registered nurses) | | | |
| | Other | | | |

SCRIPTING: SOFT CHECK TO APPEAR IF TOTAL AT Q17 FOR ANY GIVEN STAFF GROUP IS > THAN TOTAL GIVEN FOR THAT STAFF GROUP AT Q16.

Can you just confirm that <ENTER VALUE GIVEN AT Q17> is the total number of [STAFF GROUPING] from the Republic of Ireland currently employed at your service?

If yes, click on NEXT

If no, 'Please enter the correct number of [STAFF GROUPING] from the Republic of Ireland'.

QUESTIONS 17A and 17B FOR DAY CARE FOR CHILDREN SERVICES ONLY
(SEVICESECTOR = 5.) OTHERS GO TO Q18.

| | | | | |
|--|--|------|------------|----------------|
| Q17a. You said that you had [NUMBER AT Q14] members of staff overall. How many of these have... <i>Please enter the number here</i> | | | | |
| Childhood, Care, Learning and Development qualification at level 2 | | None | Don't know | Not applicable |
| Childhood, Care, Learning and Development qualification at level 3 | | None | Don't know | Not applicable |
| Childhood, Care, Learning and Development qualification at level 5 | | None | Don't know | Not applicable |
| None of these qualifications | | None | Don't know | Not applicable |

SCRIPTING – HARD CHECK – VALUE IN ANY CELL CANNOT BE GREATER THAN Q14

ASK IF >0 EU NATIONAL STAFF AT Q16 AND SERVICESECTOR = 5)

| | | | | |
|--|--|------|------------|----------------|
| Q17b. And you said that you have [NUMBER USED IN Q17] members of staff who are EU nationals. How many of these have... <i>Please enter the number here</i> | | | | |
| Childhood, Care, Learning and Development qualification at level 2 | | None | Don't know | Not applicable |
| Childhood, Care, Learning and Development qualification at level 3 | | None | Don't know | Not applicable |
| Childhood, Care, Learning and Development qualification at level 5 | | None | Don't know | Not applicable |
| None of these qualifications | | None | Don't know | Not applicable |

SCRIPTING – HARD CHECK – VALUE IN ANY CELL CANNOT BE GREATER THAN Q17

GENERAL QUESTIONS ABOUT RECRUITMENT AND RETENTION

ASK IF <servicesector> = 1, 2, 3 OR 5.

| | |
|---|---|
| Q18. Overall, how easy or difficult have you found it to <u>recruit</u> staff in the last 12 months? | |
| Very easy | 1 |
| Fairly easy | 2 |
| Fairly difficult | 3 |
| Very difficult | 4 |
| Don't know | 5 |
| Not applicable – have not tried to recruit in the last 12 months | 6 |

LOOP - ASK FOR EACH OF THE CATEGORIES OF STAFF WHERE >0 STAFF (I.E. 1 OR MORE STAFF IN THIS CATEGORY) AT Q15 AND Q18 IS NOT 6 ('Not applicable – have not tried to recruit in the last 12 months'.)

| | | | | | | | |
|------------|---|----------|----------------------------------|-------------------------|-----------------------|---|-------------|
| Q19 | <p>And in the last 12 months, has your <servicesector> found it easier or more difficult than previously to <u>recruit</u> [STAFF GROUP], or has there been no change?</p> <p>Single code</p> <p><i>Please select one answer only.</i></p> | | | | | | |
| | | Managers | Administrative/ support staff | Childcare practitioners | NMC registered nurses | Social or healthcare practitioners (except NMC registered nurses) | Other staff |
| | A lot easier | | | | | | |
| | A little easier | | | | | | |
| | There has been no change | | | | | | |
| | A little more difficult | | | | | | |
| | A lot more difficult | | | | | | |
| | Don't know | | | | | | |
| | Not applicable/My service has not tried to recruit to this staff group | | | | | | |

ASK IF CODE 1-5 AT Q18 (I.E. NOT 'NOT APPLICABLE – HAVE NOT TRIED TO RECRUIT'). IF CODE 6, SKIP TO Q21.

| Q20. How much would you estimate you have spent on staff recruitment at the <servicesector> provided by/at <servicename> in the last 12 months? | |
|---|---|
| Nothing | 1 |
| Under £100 | 2 |
| £101-£500 | 3 |
| £501-£1,000 | 4 |
| £1,001-£5,000 | 5 |
| £5,000+ | 6 |
| Don't know | 7 |

ASK IF <careservice> = 1, 2, 3 OR 5.

| Q21. Overall, how easy or difficult have you found it to <u>retain</u> staff in the last 12 months? | |
|---|---|
| Very easy | 1 |
| Fairly easy | 2 |
| Fairly difficult | 3 |
| Very difficult | 4 |
| Don't know | 5 |
| Not applicable | 6 |

LOOP - ASK FOR EACH OF THE CATEGORIES OF STAFF WHERE >0 STAFF (I.E. 1 OR MORE STAFF IN THIS CATEGORY) AT Q15

| | | | | | | | |
|---------|---|----------|--------------------------------|-------------------------|-----------------------|---|-------------|
| Q2 2 | <p>b) And in the last 12 months, has your the <servicesector> found it easier or more difficult than previously to <u>retain</u> [STAFF GROUP], or has there been no change?</p> <p>Single code</p> <p><i>Please select one answer only.</i></p> | | | | | | |
| | | Managers | Administrative / support staff | Childcare practitioners | NMC registered nurses | Social or healthcare practitioners (except NMC registered nurses) | Other staff |
| | A lot easier | | | | | | |
| | A little easier | | | | | | |
| | There has been no change | | | | | | |
| | A little more difficult | | | | | | |
| | A lot more difficult | | | | | | |
| | Don't know | | | | | | |
| | Not applicable | | | | | | |

ASK IF <careservice> = 1, 2, 3 OR 5.

| Q23. How frequently, if at all, have you used supply or agency staff in the last 12 months? | |
|---|---|
| Not at all | 1 |
| Occasionally | 2 |
| Fairly regularly | 3 |
| Very regularly/all the time | 4 |
| Don't know | 5 |

| |
|---|
| Q24. How many staff vacancies do you have at present? Please include vacancies for full- and part-time roles, and for permanent and temporary staff. |
| <i>Please enter number below</i> NONE DON'T KNOW |

SPECIFIC QUESTIONS ABOUT RECRUITMENT AND RETENTION OF EU STAFF

LOOP - ASK FOR EACH OF THE CATEGORIES OF STAFF WHERE >0 STAFF (I.E. 1 OR MORE STAFF IN THIS CATEGORY) AT Q15

| | | | | | | | |
|---------|---|----------|--------------------------------|-------------------------|-----------------------|---|-------------|
| Q2 5 | <p>a) Thinking <u>specifically about workers from the EU</u> (including the Republic of Ireland but <u>excluding</u> the UK), is your <servicesector> receiving more or fewer suitable applications <u>from EU nationals</u> for <JOB ROLE> in the last 12 months or has there been no change?</p> <p>Single code</p> <p><i>Please select one answer only.</i></p> | | | | | | |
| | | Managers | Administrative / support staff | Childcare practitioners | NMC registered nurses | Social or healthcare practitioners (except NMC registered nurses) | Other staff |
| | A lot more applications from EU nationals | | | | | | |
| | A few more applications from EU nationals | | | | | | |
| | There has been no change | | | | | | |
| | Slightly fewer applications from EU | | | | | | |

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | nationals | | | | | | |
| | Far fewer applications from EU nationals | | | | | | |
| | Don't know | | | | | | |
| | Not applicable / My service has not tried to recruit to this staff group | | | | | | |

LOOP - ASK FOR EACH OF THE CATEGORIES OF STAFF WHERE >0 STAFF (I.E. 1 OR MORE STAFF IN THIS CATEGORY) AT Q15

| | | | | | | | |
|---------|--|----------|--------------------------------|-------------------------|-----------------------|---|-------------|
| Q2 6 | <p>And still thinking <u>specifically about workers from the EU</u>, has your <servicesector> found it easier or more difficult to <u>retain EU staff (including staff from the Republic of Ireland but excluding the UK) <STAFF GROUP></u>he last 12 months (including the Republic of Ireland but excluding the UK) or has there been no change?</p> <p>If you have not had any EU staff in this role in the last 12 months, please code as 'Not applicable'.</p> <p>Single code</p> <p><i>Please select one answer only.</i></p> | | | | | | |
| | | Managers | Administrative / support staff | Childcare practitioners | NMC registered nurses | Social or healthcare practitioners (except NMC registered nurses) | Other staff |
| | A lot easier to retain EU staff | | | | | | |
| | A little easier to retain EU staff | | | | | | |
| | There has been no change | | | | | | |
| | A little more | | | | | | |

| | | | | | | | |
|--|---|--|--|--|--|--|--|
| | difficult to retain EU staff | | | | | | |
| | A lot more difficult to retain EU staff | | | | | | |
| | Don't know | | | | | | |
| | Not applicable – have not had any EU nationals in this role in last 12 months | | | | | | |

LOOP - ASK FOR EACH OF THE CATEGORIES OF STAFF WHERE >0 STAFF (I.E. 1 OR MORE STAFF IN THIS CATEGORY) AT Q15

| | | | | | |
|------------|--|--|------|------------|---|
| Q27 | <p>And how many [STAFF GROUPING] from the EU, if any, have chosen to leave your <servicesector> in the last 12 months? Again, please include staff from the Republic of Ireland but <u>exclude</u> those from the UK.</p> <p>If you have not had any EU staff in this role in the last 12 months, please code as 'Not applicable'.</p> <p>Single code</p> | | | | |
| | Managers | | NONE | Don't know | Not applicable - have not had any EU nationals in this role in last 12 months |
| | Administrative / support staff | | NONE | Don't know | Not applicable - have not had any EU nationals in this role in last 12 months |
| | Child care practitioners | | NONE | Don't know | Not applicable - have not had any EU nationals in this role in last 12 months |
| | NMC Registered nurses | | NONE | Don't know | Not applicable - have not had any EU nationals in this role in last 12 months |
| | Social or healthcare practitioners (except NMC registered nurses) | | NONE | Don't know | Not applicable - have not had any EU nationals in this role in last 12 months |
| | Other staff | | NONE | Don't know | Not applicable - have not had any EU nationals in this role in last 12 months |

ASK IF:

- ANY RESPONSE >0 AT Q27 (FOR ANY CATEGORY OF STAFF)
- OR Q13 >0.
- I.E. IF EMPLOY STAFF AND ANY OF THEIR EU STAFF HAVE LEFT IN LAST 12 MONTHS.
- OTHERS SKIP TO Q29

| | | |
|------------|---|----|
| Q28 | As far as you are aware, what are the main reasons these staff from non-UK EU countries have given for leaving your <servicesector> in the last 12 months? MULTICODE | |
| | Changes in personal circumstances | |
| | Retirement | 1 |
| | Pregnancy/maternity leave/childcare commitments | 2 |
| | Illness/Physical or mental health problems | 3 |
| | Career change/to study | 4 |
| | Promotion/to start a better job elsewhere | 5 |
| | Unhappy with aspects of their job – e.g., tasks/change in tasks, salary, hours/shift patterns etc | 6 |
| | Relocation | |
| | Relocation within the UK | 7 |
| | Relocation to non-UK EU country | 8 |
| | Relocation to a country outside the EU | 9 |
| | Other reasons | |
| | Unable to afford necessary qualifications | 10 |
| | Concerns or uncertainty about the possible impact on their work or residence status of the UK leaving the EU | 11 |

| | | |
|--|---|----|
| | Other <i>Please write in</i> | 12 |
| | Don't know | 13 |
| | Not applicable/no non-UK EU staff have left in the last 12 months | 14 |

ASK ALL

| | | | | |
|------------|---|-----------------|---|--|
| Q29 | <p>In the future, we hope to conduct some follow up research among people who have taken part in this survey. The research will help us obtain a fuller understanding of some of the issues we have asked you about. Please be assured that any information you provide for this purpose will be securely held by Ipsos MORI only and will not be passed on in a way that could identify you or your employers to anyone else, including the Welsh Government. Would you be willing to be re-contacted for this follow up research?</p> <p>Single code</p> <p><i>Please select one answer only.</i></p> | | | |
| | | Consent given | 1 | |
| | | Consent refused | 2 | |

If consent given, ask Q30

| | |
|---|---------------------------------|
| <p>Q30. Thank you very much, what is the best number to contact you on?</p> | <p><i>Enter number here</i></p> |
|---|---------------------------------|

ONLINE ONLY [NEXT SCREEN SHOW]

You have now reached the end of the questionnaire. To submit your answers, please click the 'Submit' button below. Once you have clicked this, you will not be able to change your answers to the survey.

If you wish to make any changes before submitting, please use the 'Back' button to move back through the questions. Once you have completed your changes, please return to this page and click the 'Submit' button.

ALL

Thank you for your time. The findings from this research will be published on the Welsh Government website in Summer 2019: <https://gov.wales/statistics-and-research/>