

NSW Department of Community Services
Review of the Children's Services Regulation 2004

Internet Survey Findings



Survey and Report Prepared By
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Contents

1	Introduction	3
2	Parents' Survey	5
2.1	Who responded to the survey?	5
2.2	Overall assessment of children's services	7
2.3	Main priorities	8
2.4	Staff qualifications	11
2.4.1	Responses to options	11
2.4.2	Which services?	12
2.5	Staff to child ratios	15
2.6	Family day care and home-based care	17
2.7	Group size requirements	18
2.8	Excursions	19
2.9	Provision of information to parents	22
2.10	Dealing with increased costs	24
2.10.1	Willingness to pay more	24
2.10.2	How respond to costs	26
2.11	Selected findings for non-form survey respondents	30
2.11.1	Overall assessment of children's services	30
2.11.2	Main priorities	31
2.11.3	Staff qualifications	32
2.11.4	Staff to child ratios	33
2.11.5	Willingness to pay more	34
2.11.6	How respond to costs	35
3	Service Providers' Survey	36
3.1	Who responded to the survey?	36
3.2	What should be regulated	39
3.3	Staff to child ratios	40
3.4	Proposed changes to group size	46
3.4.1	Importance of group size requirements	46
3.4.2	Support for changes to group size requirements	48
3.4.3	Likelihood of using flexibility to increase numbers of 2 to 6 year olds	50
3.5	Excursions	52
3.5.1	Making excursions safer	54
3.6	Staff qualifications	55
3.6.1	Responses to options	55
3.6.2	Application of minimum qualifications	59
3.7	Compliance and enforcement	61
3.7.1	Severity of penalties	61
3.7.2	Enforcement tools	65
3.8	Licensing model	66

A	Survey questionnaires	69
A.1	Internet survey form for parents	69
A.2	Internet survey form for service providers	76

List of Figures

2.1	How parents assess the quality of services	7
2.2	Main priorities of parents	8
2.3	Views on options for changes to staff qualifications	11
2.4	Parents' views on which services minimum qualifications requirement should apply to	14
2.5	Staff to child ratios: proposed changes	15
2.6	Family day care and home-base care options	17
2.7	Views on removal of group size requirements for those aged 3 and over	18
2.8	Importance of excursions for parents	20
2.9	Provision of information to parents	22
2.10	Willingness to pay increased costs	24
2.11	Willingness to pay increased costs, by family income	25
2.12	How parents would respond to increased child care costs	27
2.13	How parents would respond to increased child care costs, by family income	29
2.14	How parents assess the quality of services, reduced sample	30
2.15	Main priorities of parents, reduced sample	31
2.16	Views on options for changes to staff qualifications, reduced sample	32
2.17	Staff to child ratios: proposed changes, reduced sample	33
2.18	Willingness to pay increased costs, reduced sample	34
2.19	How parents would respond to increased child care costs, reduced sample	35
3.1	Whether following should be regulated	39
3.2	Staff to child ratios: proposed changes	41
3.3	Staff to child ratios: proposed changes by type	43
3.4	Staff to child ratios: proposed changes by category	44
3.5	Staff to child ratios: proposed changes by respondent position	45
3.6	Importance of group size requirements for age groups	47
3.7	Option to remove group size requirement for 3 to under 6s, by category	49
3.8	Frequency of excursions	52
3.9	Which staff qualifications most benefit children	56
3.10	Which staff qualifications most benefit children, by type	57
3.11	Which staff qualifications most benefit children, by category	58
3.12	Severity of penalties which should apply for breaches	61
3.13	Which enforcement tools most effective	65
3.14	Preferences for licensing model	66

List of Tables

2.1	Parents' own use of child care	6
2.2	Parents' own children—age groups	6
2.3	Family income of respondents	6
2.4	How parents assess the quality of services (%)	7
2.5	Main priorities of parents (%)	9
2.6	Main priorities of parents, by type of service	10
2.7	Views on options for changes to staff qualifications (%)	12
2.8	Views on staff qualifications, by type of service (%)	13
2.9	Parents' views on which services minimum qualifications requirement should apply to	14
2.10	Staff to child ratios: proposed changes	16
2.11	Staff to child ratios: proposed changes by type of service (%)	16
2.12	Staff to child ratios: proposed changes by ages of children (%)	16
2.13	Family day care and home-base care options	17
2.14	Views on removal of group size requirements for those aged 3 and over	18
2.15	Views on removal of group size requirements for those aged 3 and over (%)	19
2.16	Importance of excursions for parents	20
2.17	Importance of excursions for parents, by type of service (%)	21
2.18	Provision of information to parents (%)	22
2.19	Provision of information to parents, by type of service (%)	23
2.20	Willingness to pay increased costs	24
2.21	Willingness to pay increased costs, by type of service (%)	25
2.22	Willingness to pay increased costs by family income (%)	26
2.23	How parents would respond to increased child care costs	27
2.24	How parents would respond to increased child care costs, by type of service (%)	27
2.25	How parents would respond to increased child care costs, by family in- come (%)	28
2.26	How parents assess the quality of services, reduced sample (%)	31
2.27	Main priorities of parents, reduced sample (%)	32
2.28	Views on options for changes to staff qualifications, reduced sample (%)	33
2.29	Staff to child ratios: proposed changes, reduced sample	34
2.30	Willingness to pay increased costs, reduced sample	35
2.31	How parents would respond to increased child care costs, reduced sample	35
3.1	Respondents to the survey	36
3.2	Organisational size of service providers	37
3.3	Characteristics of respondents and population comparisons (%)	38
3.4	Whether following should be regulated (%)	39
3.5	Staff to child ratios: proposed changes	41
3.6	Staff to child ratios: proposed changes breakdown (%)	42

Review of the Children’s Services Regulation: Survey Results

3.7	Importance of group size requirements for age groups (%)	46
3.8	Importance of group size requirements for age groups, by category (%)	47
3.9	Option to remove group size requirement for 3 to under 6s	48
3.10	Option to remove group size requirement for 3 to under 6s, breakdown (%)	49
3.11	How likely to use flexibility to increase maximum numbers of 2–6 year olds	50
3.12	How likely to use flexibility, breakdown (%)	51
3.13	Frequency of excursions (%)	53
3.14	Frequency of excursions, by type of service (%)	53
3.15	Risk assessment and excursions	54
3.16	Risk assessment and excursions, breakdown (%)	55
3.17	Which staff qualifications most benefit children (%)	56
3.18	Which staff qualifications most benefit children, breakdown (column %)	59
3.19	To whom should minimum qualifications apply	59
3.20	To whom should minimum qualifications apply, breakdown (%)	60
3.21	Severity of penalties which should apply for breaches (%)	62
3.22	Severity of penalties which should apply for breaches, by type of service (%)	63
3.23	Severity of penalties which should apply for breaches, by category of service (%)	64
3.24	Which enforcement tools most effective (%)	65
3.25	Preferences for licensing model (%)	66
3.26	Preferences for licensing model, by type of service (%)	67
3.27	Preferences for licensing model, by category of service (%)	68

Key Findings

◇ Parents' Survey

Some 1,366 parents responded to this survey, with about 70 per cent having children in long day care.

A large majority of parents assessed the quality of long day care, family day care, home-based care and preschools as being very high. Assessments of school-based preschool and mobile services were not as favourable.

The main priorities of parents—apart from having caring staff—were the physical environment and equipment of services, followed by the number of staff caring for each child. The qualifications of the staff were seen as the lowest priority.

A majority of parents saw the option of increasing the number of staff with child protection and first aid qualifications as having benefits for children.

Parents mainly thought that preschools, long day care and school-based preschools should be the services to which a minimum qualifications requirement should apply.

Parents were evenly divided on the issue of replacing the 1 to 5 staff to child ratio (for under 2 year olds) with a 1 to 4 ratio. 30 per cent opposed this change and 29 per cent thought the new ratio

should simply replace the old. Much smaller proportions endorsed phasing the ratio in, or applying it to only the youngest children.

Parents were also divided over options for changing group size requirements. About 40 per cent of parents were 'very concerned' about the option to relax the current requirements for 3 to under 6 year olds, while 38 per cent were 'not concerned'. About 16 per cent were 'slightly concerned'.

Parents were keen that their children should have the opportunity of going to local parks, schools and shops, and, to a lesser extent, on longer excursions (such as museums). There was very little support for their children going on excursions which took them near water.

The majority of parents agreed that a range of information about their child[ren]'s service should be made available to them.

About half of all parents were not willing to pay more for child care, while about one quarter were willing to pay up to \$5 more per day (per child). Among parents on low incomes, some three quarters were not willing to pay more.

If additional child care costs caused

financial difficulties, parents reported they would 'stop working in a paid job' (29 per cent) or make household savings by cutting back on their

expenditure (25 per cent). About 19 per cent indicated they would make other child care arrangements.

◆ Service Providers' Survey

Some 1,145 persons responded to this survey, with the majority being supervisors, licensees or staff in children's services. About 55 per cent of respondents were based in long day care and 30 per cent were in preschools. About 38 per cent were in services run by private providers and another 40 per cent were in the community-based not-for-profit sector.

When asked what services should be regulated, a solid majority of respondents felt regulation should apply to those services where the parents were not on the premises (86 per cent) and where the care was provided in a community venue, not usually used for child care (71 per cent).

On the issue of staff to child ratios there was strong support—some 40 per cent—for simply replacing the old ratio (1 to 5) with the new ratio (1 to 4). Only 16 per cent of respondents opposed the change, and smaller proportions wanted its introduction modified in some way.

On the issue of giving centres some flexibility in the size of groups for children aged 3 to under 6, respondents were divided. About 38 per cent supported the option but 47 per cent opposed it and about 16 per cent were unsure.

When asked if they would make use of this flexibility, a majority indicated they would.

When it came to making excursions for children safer, more respondents favoured requiring risk assessments (45

per cent) than favoured requiring higher staff to child ratios (34 per cent).

Respondents were asked which changes to staff qualifications would have the most benefit for children. The options which rated most highly were introducing minimum qualification requirements for all centres and increasing the number of staff with child protection and first aid qualifications.

When asked to whom a minimum qualifications requirement should apply, a majority of respondents indicated that it should apply to all staff in all types of children's services (57 per cent). A minority (30 per cent) thought the requirement should not be introduced and a smaller proportion (14 per cent) thought it should only apply to staff in centre-based and mobile services.

Respondents were asked which breaches of the Regulation they thought should attract the highest penalties. Large majorities of respondents indicated that three types of breaches should attract the most censure: where facilities and equipment were unsafe; where there was poor hygiene or food preparation; and where there was inadequate staffing.

A majority of respondents thought that compliance notices were the most effective enforcement tools. All other options fell a long way behind in popularity.

The most highly favoured licensing model was for extending the licence period from 3 to 5 years.



Introduction

This report contains detailed findings for the two internet surveys conducted by RPR Consulting, as part of the consultation component of the Review of the Children's Services Regulation 2004 by the NSW Department of Community Services. For information on that review, see the *Discussion Paper* produced by DoCS and available at http://www.community.nsw.gov.au/docswr/_assets/main/documents/reg_review_paper.pdf.

The first survey sought the views of parents on a number of options outlined in the *Discussion Paper*, while the second survey sought the views of service providers (including licensees, staff and other interested parties). Both surveys were conducted as online surveys and were open to the general public for participation. In this respect, the surveys were not probability samples, but rather, samples which were determined by self-selection. As such, one cannot generalise to a larger population from these findings. Since these surveys have been a consultation process, this research limitation is not a serious shortcoming.

In the findings discussed below, responses to all of the main questions are presented in a standard format. A table of counts (and percentages) as well as a chart (either a barchart or a dotplot) are shown first, and a short discussion of the results accompanies these. Where feasible, these counts are

shown in descending order of importance so that the reader can see at a glance what respondents thought was most important. If the counts follow some kind of natural ordering, then this descending order presentation is not used.

Generally, the table of counts for each question are followed by a breakdown of the data in the form of cross-tabulations (and multiple panel dotplots). For the parents, the additional information included in these cross-tabulations is the type of service used by the parents (e.g. long day care, family day care etc.). A few cross-tabulations on family income are also included where this is appropriate (such as in the discussion of child care costs).

In the case of the service providers, the breakdown includes not only the type of service, but also its category (e.g. provide provider, community-based not-for-profit, local council). In addition, geographical breakdowns are often provided.

Many of the tables have an 'n' column, which is the number of observations for each row in the table. This allows readers to calculate for themselves the number of observations in any particular category they might be interested in.

Where cross-tabulations are involved, the ordering of the items or options reverts to the original order in the questionnaire, rather than the

descending order of importance. This sometimes means that the order of the options changes in adjacent tables, as one moves from a table of counts to a two-way table.

The charts generally omit the 'don't knows' but these are usually shown in the tables. Sometimes, the tables show totals of 99 and 101 per cent, and these are just the result of rounding. More importantly, the totals in some tables do not equal 100 per cent (and the counts do not match the sample size). This is the result of questions which allowed multiple answers (e.g. 'tick all that apply') and is a common phenomenon. It is important to keep in mind that the

percentages in all the tables are for the respondents who answer, not for the responses themselves.

The commentary and the tables provide sufficient information about each question, but readers who would like to see the exact wording of the questions and the options can find the survey forms at the back of this report, in Appendix [A.1](#) and [A.2](#).

Finally, RPR Consulting would like to thank John Mason, Rachel Smith, John Tansey and Carol Phillips (all from D0CS) and Deborah Brennan (from SPRC at UNSW) for their generous assistance in the conduct of these surveys.

◇ 2

Parents' Survey

◇ 2.1 Who responded to the survey?

The DoCS parents' survey was conducted as an online survey, and was open to the public for the period 24 November 2008 to 14 December 2008. People accessed the survey website via a link on the DoCS website. The survey form is reproduced in Appendix A.1.

After removing duplicates the final sample size was 1,366 persons. Of these, 166 were classified as 'form surveys', responses which were orchestrated to provide the same information. In the main parts of this chapter, the results are presented for all 1,366 persons. In the final section of the chapter, some of the key findings are presented for 1,200 respondents, the group which did not include the 'form survey' responses.

While some respondents may not have been parents, for ease of expression the terms 'parents', 'persons' and 'respondents' are used interchangeably.

Nearly three quarters of parents had children in long day care while 31 per cent had children in preschools (Table 2.1). About 16 per cent had children in

family day care, and small numbers made use of the other types of children's services. Because parents used multiple types of services, these proportions add up to more than 100 per cent. In the remainder of this report, school-based and mobile services are combined into an 'other' category, since the numbers are so small.

About two thirds of parents had children aged from 3 to under 6, and about one third had children aged 0 to under 2 and another third had children aged 2 to under 3. (Again, totals add to more than 100 per cent because many parents had more than one child.) Table 2.2 shows the details.

The parents who responded were spread across a range of income groups. About one quarter were 'low income', with a gross family income of under \$50,000 per annum. One fifth were 'high income', with a gross family income of \$125,000 or more. The remaining parents were in 'middle income' families. Table 2.3 provides more details.

Review of the Children’s Services Regulation: Survey Results

Table 2.1: Parents’ own use of child care

Childrens’ services	Number	Per cent
Long day care	843	70
Preschools	369	31
Family day care	186	16
Occasional care	84	7
Home-based services	50	4
School-based preschools	28	2
Mobile services	16	1

Notes: Totals add to more than 1,366 (and 100%) because multiples allowed.

Source: DoCS Parents’ Internet Survey. *Population:* All respondents (n = 1,366).

Table 2.2: Parents’ own children—age groups

Age groups	Number	Per cent
Child aged 0 to under 2	434	32
Child aged 2 to under 3	440	32
Child aged 3 to under 6	891	65

Notes: Totals add to more than 1,366 (and 100%) because many parents had more than one child.

Source: DoCS Parents’ Internet Survey. *Population:* All respondents (n = 1,366).

Table 2.3: Family income of respondents

Gross family income	Number	Per cent
< \$50,000 pa	340	25
\$50,000 < \$90,000 pa	408	30
\$90,000 < \$125,000 pa	297	22
\$125,000 plus pa	267	20
Don’t know	54	4
Total	1,366	101

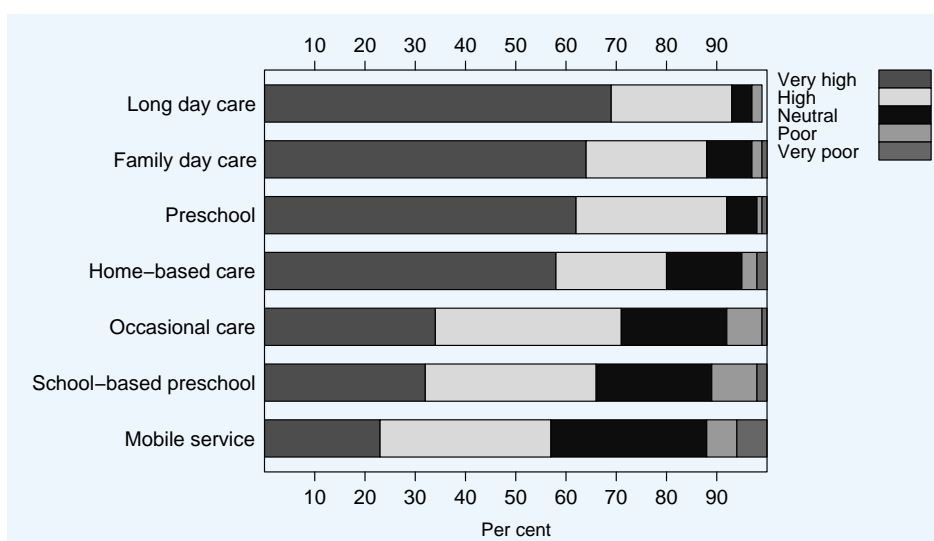
Source: DoCS Parents’ Internet Survey. *Population:* All respondents who provided information on family income (n = 1,345).

◇ 2.2 Overall assessment of children’s services

Parents were asked at the outset of the survey to assess the quality of the children’s services which they used. As Figure 2.1 and Table 2.4 show, long day care centres, preschools, family day care centres and home-based care arrangements were regarded favourably. Between 58 and 69 per cent of parents rated these services as being ‘very high’ quality. These services also rated well in the ‘high’ quality category. By way of

contrast, mobile services, school-based preschools and occasional care were rated much less favourably. The percentage of parents who rated these services as ‘very high’ in quality was between 23 and 34 per cent of parents. Indeed, between 21 and 31 per cent of parents gave them only a ‘neutral’ rating, and between 8 and 12 per cent of parents actually rated them as either ‘poor’ or ‘very poor’.

Figure 2.1: How parents assess the quality of services



Source: DoCS Parents’ Internet Survey. See Table 2.4

Table 2.4: How parents assess the quality of services (%)

Services used by parents	Very high	High	Neutral	Poor	Very poor	Total
Long day care	69	24	4	2	0	99
Family day care	64	24	9	2	2	101
Preschool	62	30	6	1	1	100
Home-based care	58	22	15	3	3	101
Occasional care	34	37	21	7	1	100
School-based preschool	32	34	23	9	2	100
Mobile service	23	34	31	6	6	100

Notes: Total number of respondents exceeds 1,366 because multiple responses allowed. That is, parents had children in more than one type of service.

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

◇ 2.3 Main priorities

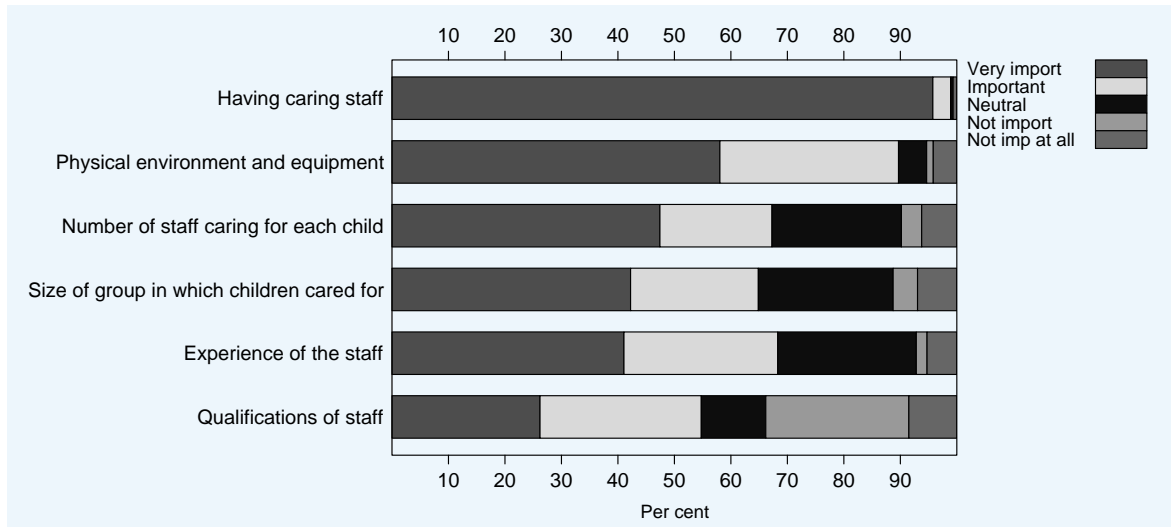
Parents were asked what factors they considered most important when it came to assessing the *quality* of child care. As expected, ‘having caring staff’ was universally endorsed. This item was included by the survey design team only to facilitate the wording of the question, so the real interest lies in the other items.

Figure 2.2 and Table 2.5 show that, apart from this item on caring staff, the ‘physical environment and equipment’ was the most important priority for parents, followed by the ‘number of staff

caring for each child’. Some 58 per cent of respondents endorsed the former as ‘very important’ and 47 per cent endorsed the latter as ‘very important’. A larger proportion of ‘important’ ratings went to the physical environment item (32 per cent), well ahead of the number of staff item (20 per cent).

The ‘qualifications of the staff’ had the lowest priority among parents: only 26 per cent of respondents gave this item a ‘very important’ rating, while 25 per cent actually rated it as ‘not important’.

Figure 2.2: Main priorities of parents



Source: DoCS Parents’ Internet Survey. See Table 2.5

Table 2.5: Main priorities of parents (%)

Priority	Very imp	Important	Neutral	Not imp	Not imp at all	Total
Having caring staff	96	3	0	0	1	100
Physical environment and equipment	58	32	5	1	4	100
Number of staff caring for each child	47	20	23	4	6	100
Size of group in which children cared for	42	23	24	4	7	100
Experience of the staff	41	27	25	2	5	100
Qualifications of staff	26	29	11	25	8	100

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

A breakdown of these results for each type of service is shown in Table 2.6 and these reveal some interesting patterns. Before looking at these more closely, it’s worth noting that the overall results (discussed above) are sometimes driven by the respondents whose children were in long day care. With nearly three quarters of parents using this type of service, the overall figures are bound to be considerably influenced by what these respondents have to say.

The ‘qualifications of staff’ item was endorsed more strongly by parents with children in preschools and occasional care centres. The weakest supporters for this item were those parents with children in long day care.

Support for the ‘number of staff caring for each child’ item was strong across most types of service with the exception of long day care. Here the ‘very important’ category was endorsed by about 41 per cent of parents, whereas in other types of services the equivalent percentages were in the 60 to 70 per cent range.

The item ‘size of group in which children

were cared for’ also showed a similar pattern. Parents using long day care showed weakest support for this item—with 35 per cent saying it was very important—while parents in other services were more supportive (in the 60 per cent range).

The item dealing with the ‘experience of the staff’ followed the same pattern. While parents using long day care were again weakest in support—with 35 per cent in the very important group—the parents using other services were mostly in the 50 to 60 per cent range.

Finally, the item which dealt with the ‘physical environment and equipment’ was most strongly endorsed by parents using long day care (some 60 per cent). It is worth noting that this item was still strongly endorsed by parents using other services (mostly in the 50 per cent range). This item’s high ranking is reinforced by the fact that it also scored highly in the ‘important’ category as well (averaging 32 per cent). Indeed, some 90 per cent of all parents felt that this item was either ‘very important’ or ‘important’, a percentage well ahead of any other item in this table.

Table 2.6: Main priorities of parents, by type of service

Priority	Very imp	Important	Neutral	Not imp	Not imp at all	Total	n
Qualifications of staff							
Long day care	22	24	9	33	11	100	1,009
Preschools	39	40	13	5	3	100	370
Family day care	27	39	26	7	1	100	186
Home-based	28	44	14	12	2	100	50
Occasional care	39	42	11	7	1	100	84
Other	37	34	22	7	0	100	41
All respondents	26	29	11	25	8	100	1,366
Number of staff caring for each child							
Long day care	41	16	30	5	8	100	1,009
Preschools	67	26	3	2	1	100	370
Family day care	57	35	6	1	1	100	186
Home-based	60	28	6	6	0	100	50
Occasional care	70	25	2	1	1	100	84
Other	66	27	5	2	0	100	41
All respondents	47	20	23	4	6	100	1,366
Size of group in which children cared for							
Long day care	35	19	31	5	9	100	1,009
Preschools	59	31	5	3	2	100	370
Family day care	56	37	5	2	0	100	186
Home-based	66	22	2	10	0	100	50
Occasional care	65	27	2	4	1	100	84
Other	61	24	7	5	2	100	41
All respondents	42	23	24	4	7	100	1,366
Experience of the staff							
Long day care	35	25	31	2	7	100	1,009
Preschools	58	32	6	2	1	100	370
Family day care	53	39	6	1	0	100	186
Home-based	54	36	8	2	0	100	50
Occasional care	61	35	4	1	0	100	84
Other	51	39	5	5	0	100	41
All respondents	41	27	25	2	5	100	1,366
Physical environment and equipment							
Long day care	60	27	6	1	6	100	1,009
Preschools	52	41	5	1	1	100	370
Family day care	51	45	4	1	0	100	186
Home-based	52	42	6	0	0	100	50
Occasional care	58	38	4	0	0	100	84
Other	49	37	7	7	0	100	41
All respondents	58	32	5	1	4	100	1,366

Notes: 'Other' category includes mobile services and school-based services. Note that these items are no longer sorted in descending order but are presented in the order in which they appeared in the survey. The item 'having caring staff' has been omitted because it was universally endorsed.

Source: DoCS Parents' Internet Survey. Population: All respondents (n = 1,366).

◇ 2.4 Staff qualifications

2.4.1 Responses to options

Parents were asked for their views on possible changes to the qualification requirements for staff in children’s services. Four options were presented, and parents were asked to rate the importance of each option in terms of the likely benefit to children. The overall findings for this question are shown in Figure 2.3 and in Table 2.7.

The key finding in this area is that parents appear divided on the issue of staff qualifications (though not evenly divided). All four options received solid levels of support, but there was also opposition to the options presented. This opposition was generally expressed as a strong endorsement of the ‘not important at all’ category.

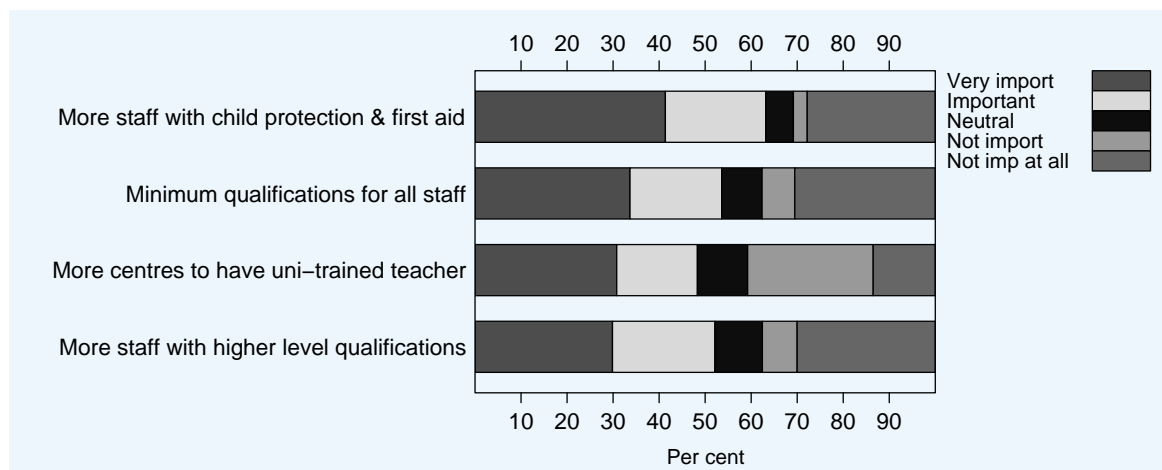
The option of increasing the number of staff who had child protection and first aid qualifications in all types of children’s services received the most support. Some 41 per cent of parents regarded it as ‘very important’ and another 22 per

cent regarded it as ‘important’ (a total of 63 per cent). However, a sizeable minority—some 31 per cent—opposed the option, with the strongest sentiment (‘not important at all’) being endorsed by 28 per cent of parents.

The option with the second highest level of support was introducing a minimum qualification for staff and carers across all types of children’s services. This option was endorsed by 54 per cent of parents (34 per cent in the ‘very important’ category; 20 per cent in the ‘important’ category). Again, opposition was also notable, with 38 per cent dismissing this option.

The option of increasing the proportion of staff with higher level qualifications in child care centres and preschools was supported by 52 per cent of parents and opposed by 38 per cent. The option of requiring more child care centres and preschools to employ a university-trained early childhood teacher was supported by 49 per cent of parents and opposed by 40 per cent.

Figure 2.3: Views on options for changes to staff qualifications



Source: DoCS Parents’ Internet Survey. See Table 2.7

Table 2.7: Views on options for changes to staff qualifications (%)

Options for changes	Very imp	Important	Neutral	Not imp	Not imp at all	Total
More staff with child protection & first aid	41	22	6	3	28	100
Minimum qualifications for all staff	34	20	9	7	31	100
More centres to have uni-trained teacher	31	18	11	27	13	100
More staff with higher level qualifications	30	22	10	8	30	100

Source: DoCS Parents' Internet Survey. Population: All respondents (n = 1,366).

A breakdown of these findings by the type of children's services which parents used is shown in Table 2.8. As with the earlier findings, the overall results are often driven by the responses of parents using long day care. (Note that these options are discussed below in the original order they appeared in the survey, rather than in descending order of importance).

The option for minimum qualifications for all staff was endorsed most strongly by parents with children in preschools and occasional care, with the weakest support among those with children in long day care. Indeed outright opposition to this option—expressed in the 'not important at all' category—was only prominent among the long day care parents. For this group, some 41 per cent endorsed this category, while another 8 per cent endorsed the 'not important' category. Among parents using other types of service, opposition remained in single figures, though some 12 per cent of parents using home-based services endorsed the 'not important' category.

Increasing the proportion of staff with higher level qualifications was also strongly endorsed by parents with children in preschools and occasional care. For parents using preschools some 75 per cent were positive (with 47 per cent in the 'very important' category) and for those using occasional care the figure was 81 per cent (with 49 per cent in the 'very important' category). Again,

the only notable opposition was among parents using long day care, where 40 per cent endorsed the 'not important at all' category.

The option of increasing the proportion of staff with qualifications in child protection and first aid was supported strongly by parents whose children attended all types of services, though with long day care still the domain of those in opposition. The level of support hovered around 80 to 90 per cent for most services. Among parents using long day care the level of support was 62 per cent and some 37 per cent indicated this option was 'not important at all'. For parents using other types of services, this kind of low rating stayed in single figures.

Finally, the option of having more centres employing university-trained early childhood teachers largely followed the same pattern. Again, parents with children in long day care were the weakest supporters of this option (42 per cent in favour), while parents with children in occasional care were the strongest supporters (72 per cent in favour). Support among parents using other types of services was mainly in the mid-60 per cent range.

2.4.2 Which services?

The survey explained to parents that if any changes were introduced to require minimum qualifications, or upgraded qualifications for staff and carers, then

Table 2.8: Views on staff qualifications, by type of service (%)

Options for changes	Very imp	Important	Neutral	Not imp	Not imp at all	Total	n
Minimum qualifications for all staff							
Long day care	28	16	8	8	41	100	1,009
Preschools	51	25	12	6	5	100	370
Family day care	35	37	16	9	3	100	186
Home-based	42	36	8	12	2	100	50
Occasional care	50	29	12	6	4	100	84
Other	44	27	10	17	2	100	41
All respondents	34	20	9	7	31	100	1,366
More staff with higher level quals							
Long day care	25	18	9	8	40	100	1,009
Preschools	47	28	12	8	5	100	370
Family day care	30	42	17	9	2	100	186
Home-based	34	36	22	6	2	100	50
Occasional care	49	32	8	8	2	100	84
Other	34	37	12	15	2	100	41
All respondents	30	22	10	8	30	100	1,366
More staff with child prot & first aid							
Long day care	34	20	5	4	37	100	1,009
Preschools	59	29	8	2	2	100	370
Family day care	58	32	8	2	1	100	186
Home-based	60	22	6	4	8	100	50
Occasional care	56	33	7	1	2	100	84
Other	66	32	0	2	0	100	41
All respondents	41	22	6	3	28	100	1,366
More centres with uni-trained teacher							
Long day care	27	15	8	34	17	100	1,008
Preschools	45	22	16	8	9	100	370
Family day care	33	29	23	12	3	100	185
Home-based	36	32	18	6	8	100	50
Occasional care	52	20	13	12	2	100	84
Other	41	17	17	10	15	100	41
All respondents	31	18	11	27	13	100	1,364

Notes: 'Other' category includes mobile services and school-based services. Note that these items are no longer sorted in descending order but are presented in the order in which they appeared in the survey.

Source: DoCS Parents' Internet Survey. Population: All respondents (n = 1,366).

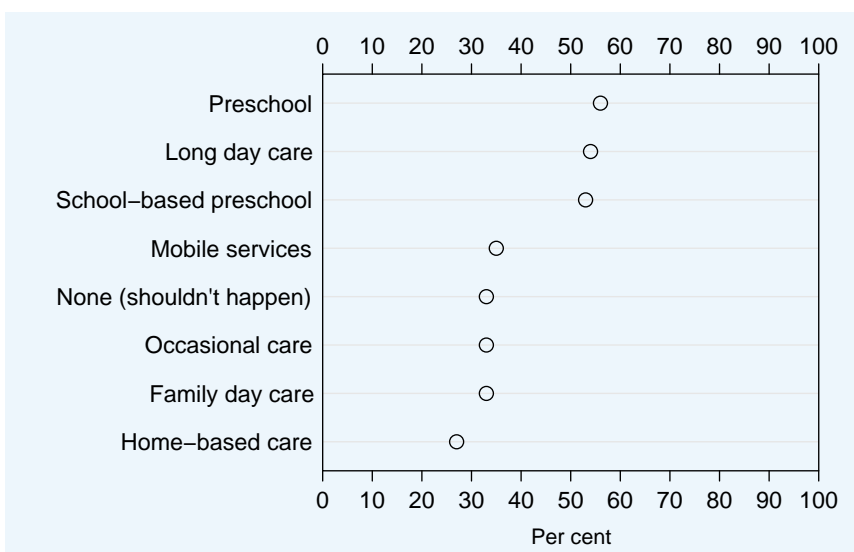
this would be phased in over time. This would give existing staff and carers an opportunity to gain qualifications and/or have their prior experience recognised. Parents were then asked to nominate which services they thought this minimum qualifications requirement should apply to.

As Figure 2.4 and Table 2.9 show, the highest percentages of parents thought this requirement should apply to preschool, long day care and

school-based preschool (mid 50 per cent range). A smaller percentage thought it should apply in mobile services, occasional care and family day care (mid 30 per cent range). The least percentage of parents thought it should apply in home-based care (27 per cent).

Parents were also given the option of nominating ‘none’, meaning that the changes should not be introduced. Some 33 per cent of parents agreed with this option.

Figure 2.4: Parents’ views on which services minimum qualifications requirement should apply to



Source: DoCS Parents’ Internet Survey. See Table 2.9

Table 2.9: Parents’ views on which services minimum qualifications requirement should apply to

	Number	Per cent
Preschool	760	56
Long day care	735	54
School-based preschool	721	53
Mobile services	476	35
Occasional care	456	33
None (shouldn't happen)	456	33
Family day care	446	33
Home-based care	366	27

Notes: Multiple responses allowed, hence totals exceed 1,366 (and 100%).

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

◇ 2.5 Staff to child ratios

Parents were informed that the NSW Government had decided that there should be a ratio of 1 staff member for every 4 children (for under 2 year olds) in centre-based and mobile services. They were then asked about the best way to introduce the new ratio. While the option of leaving the ratio at 1 to 5 was not included in the list, a large proportion chose ‘other’ and wrote in a ‘no change’ option in the text box provided on the survey form.

Figure 2.5 and Table 2.10 show that this ‘no change’ option was the most common response, with 30 per cent of parents expressing this view. (Once the ‘form survey’ respondents are removed, this figure drops to 20 per cent, as Table 2.29 below shows. For a more detailed explanation of the ‘form surveys’ see Section 2.11 below.)

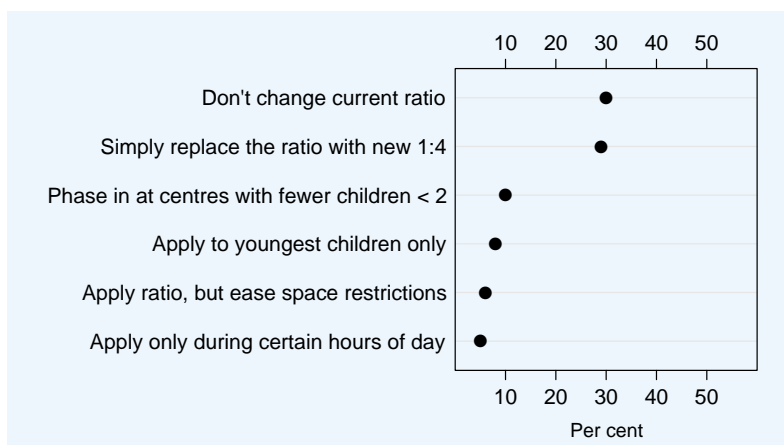
The next most common response, just one percentage point lower, was to ‘simply replace the ratio with the new 1 to 4 ratio’, with 29 per cent of parents supporting this option. Of the remaining

options, phasing in was endorsed by 10 per cent of parents and applying to the youngest children only was supported by 8 per cent.

The least support for changing the ratio was among those parents with children in long day care. As Table 2.11 shows, some 39 per cent of these parents endorsed the ‘no change’ option, whereas among parents using other centres the percentages for this were in single figures. Among these other parents, the largest response was to simply replace the ratio, with around 40 per cent expressing this view. An exception to this were parents using family day care, of whom 27 per cent wanted to see the new ratio just introduced and 20 per cent wanted to see it phased in.

Looking at these data from the perspective of the children’s ages, Table 2.12 suggests that there are no differences in parents’ perceptions across the different age groups.

Figure 2.5: Staff to child ratios: proposed changes



Source: DoCS Parents’ Internet Survey. See Table 2.10

Table 2.10: Staff to child ratios: proposed changes

Options	Number	Per cent
Don't change current ratio	411	30
Simply replace the ratio with new 1:4	400	29
Phase in at centres with fewer children < 2	131	10
Apply to youngest children only	107	8
Don't know	91	7
Apply ratio, but ease space restrictions	86	6
Other	78	6
Apply only during certain hours of day	62	5
Total	1,366	101

Source: DoCS Parents' Internet Survey. Population: All respondents (n = 1,366).

Table 2.11: Staff to child ratios: proposed changes by type of service (%)

Type of service	No change	Replace	Ease space	Phase in	Youngest	Core hours	Other	DK	Total	n
Long day care	39	26	6	6	7	5	6	5	100	1,009
Preschools	6	44	5	14	9	5	5	11	100	370
Family day care	6	27	6	20	17	5	5	13	100	186
Home-based	8	40	8	14	10	6	8	6	100	50
Occasional care	5	40	11	12	10	6	7	10	100	84
Other	7	37	20	2	17	2	7	7	100	41
All respondents	30	29	6	10	8	5	6	7	100	1,366

Notes: Full wording of options: 'Don't change the existing ratio'; 'Simply replace the current 1 to 5 ratio with the new 1 to 4 ratio'; 'Apply the 1 to 4 ratio, and ease restrictions on use of space for affected services'; 'Phase it in by applying it first to centres with more children under 2 before centres with fewer children under 2'; 'Apply it to the youngest children only (those under 18 months)'; 'Apply it only during certain parts of the day, such as core hours like 9am to 5pm'.

Source: DoCS Parents' Internet Survey. Population: All respondents to which the question was applicable (n = 1,366).

Table 2.12: Staff to child ratios: proposed changes by ages of children (%)

Age of child	No change	Replace	Ease space	Phase in	Youngest	Core hours	Other	DK	Total	n
Child aged 0 to under 2	28	29	7	11	9	5	7	4	100	434
Child aged 2 to under 3	30	29	7	9	8	4	5	6	100	440
Child aged 3 to under 6	30	29	6	9	7	5	6	7	100	891
All respondents	30	29	6	10	8	5	6	7	100	1,366

Notes: See notes to Table 2.11 for full wording of options.

Source: DoCS Parents' Internet Survey. Population: All respondents to which the question was applicable (n = 1,366).

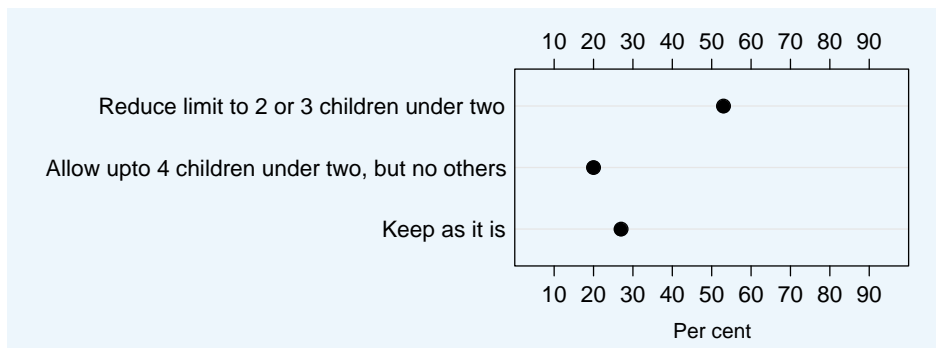
◇ 2.6 Family day care and home-based care

The survey contained a question which was specific to family day care services and home-based carers, a sub-group of the population which numbered 850 respondents (the ‘not applicable’s and ‘don’t know’s being excluded). The survey noted that at present these services can look after up to five under 2 year olds at any one time and

canvassed with parents whether this number should be reduced.

The majority of this sub-population—some 53 per cent—supported a reduction in the limit to 2 or 3 children aged under two year olds. About 27 per cent wanted the current requirement retained. (See Figure 2.6 and Table 2.13).

Figure 2.6: Family day care and home-base care options



Source: DoCS Parents’ Internet Survey. See Table 2.13

Table 2.13: Family day care and home-base care options

Options	Number	Per cent
Reduce limit to 2 or 3 children under two	450	53
Allow upto 4 children under two, but no others	169	20
Keep as it is	231	27
Total	850	100

Notes: Full wording of options: 1) ‘Reducing the limit on the number of under 2 year olds to either two or three children’ and 2) ‘Allowing a family day or home-based carer to care for four children under two years, but no other children at the same time’

Source: DoCS Parents’ Internet Survey. Population: All respondents to which the question was applicable (n = 850).

◇ 2.7 Group size requirements

Parents were informed in the survey about the current Regulation requirements for group sizes in centre-based and mobile services. For those aged under 2, the maximum group size is 10. For those aged 2 to under 3, it is 16, and for those aged 3 to under 6, the requirement is 20.

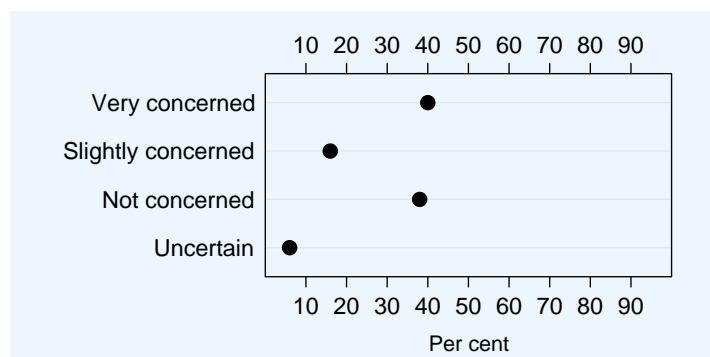
Parents were then asked if they would be concerned if this requirement was removed for 3 to under 6 year olds, to give centres some flexibility in the size of groups.

Parents were strongly divided on this issue (though not evenly). Some 40 per cent said they were ‘very concerned’, and another 16 per cent said they were

‘slightly concerned’. On the other hand, about 38 per cent said they were ‘not concerned’ (see Figure 2.7 and Table 2.14).

Among parents with children in preschools, the level of concern was much higher: some 58 per cent were ‘very concerned’ and 19 per cent were ‘slightly concerned’, a total of 77 per cent. Only 17 per cent of these parents were ‘not concerned’. By way of contrast, those parents with children in long day care were more evenly divided in their position, with 49 per cent concerned (36 per cent ‘very concerned’, 13 per cent ‘slightly concerned’) as against 47 per cent who were ‘not concerned’.

Figure 2.7: Views on removal of group size requirements for those aged 3 and over



Source: DoCS Parents’ Internet Survey. See Table 2.14

Table 2.14: Views on removal of group size requirements for those aged 3 and over

Options for changes	Number	Per cent
Very concerned	550	40
Slightly concerned	213	16
Not concerned	522	38
Uncertain	81	6
Total	1,366	100

Source: DoCS Parents’ Internet Survey.
Population: All respondents (n = 1,366).

Table 2.15: Views on removal of group size requirements for those aged 3 and over (%)

Type of service	Very concerned	Slightly concerned	Not concerned	Uncertain	Total	n
Long day care	36	13	47	4	100	1,009
Preschools	58	19	17	6	100	370
Family day care	48	24	13	16	100	186
Home-based	64	20	12	4	100	50
Occasional care	60	17	14	10	100	84
Other	56	27	12	5	100	41

Notes: Multiple types of service included, so total n will exceed 1,145.

Source: DoCS Parents’ Internet Survey.

Population: All respondents (n = 1,366).

◇ 2.8 Excursions

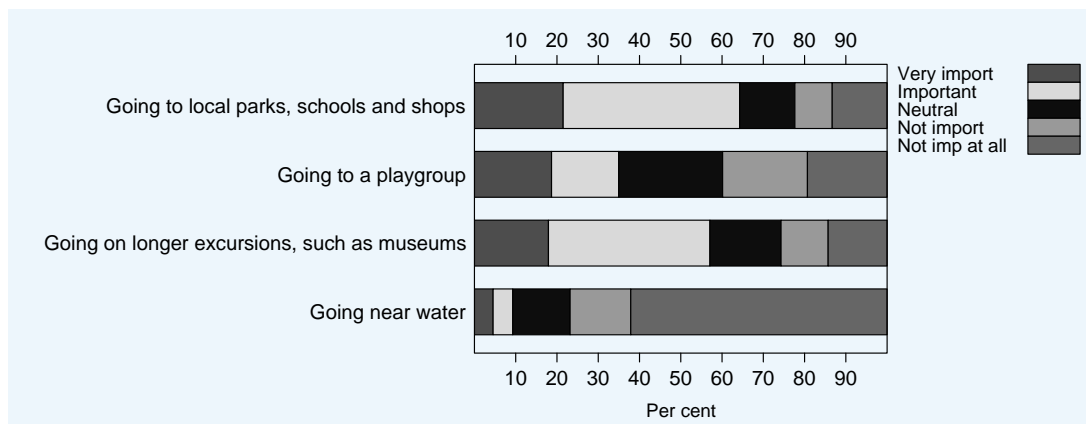
Parents were asked how they rated the importance of excursions for their children. They were given a list of four aspects of excursions and asked to rate their importance.

As Figure 2.8 and Table 2.16 show, parents were keen that their children should have the opportunity of going to local parks, schools and shops. Around 65 per cent regarded these kinds of excursion as either ‘very important’ or ‘important’. Some 57 per cent of parents thought that the opportunity for their children to go on longer excursions (such as museums) was either ‘very important’ or ‘important’. Another 35 per

cent regarded going to a playgroup as either ‘very important’ or ‘important’. A large majority—some 77 per cent—thought that excursions which involved their children going near water were ‘not important’ (or ‘not important at all’).

Among parents whose children were in family day care, excursions to local parks, as well as longer excursions, were highly regarded (see Table 2.17). Some 82 per cent of these parents thought visits to local parks were either ‘very important’ or ‘important’, while the figure for longer excursions was 81 per cent.

Figure 2.8: Importance of excursions for parents



Source: DoCS Parents’ Internet Survey. See Table 2.16

Table 2.16: Importance of excursions for parents

Type of excursion (%)	Very imp	Important	Neutral	Not imp	Not imp at all	Total
Going to local parks, schools and shops	22	43	13	9	13	100
Going to a playgroup	19	16	25	21	19	100
Going on longer excursions, such as museums	18	39	17	11	14	100
Going near water	5	5	14	15	62	100

Source: DoCS Parents’ Internet Survey.

Population: All respondents for whom excursions were relevant (n varied between 1,144 and 1,261).

Table 2.17: Importance of excursions for parents, by type of service (%)

Type of service	Very imp	Important	Neutral	Not imp	Not imp at all	Total	n
Going to local parks, school & shops							
Long day care	13	13	29	24	20	100	832
Preschools	22	17	20	16	24	100	280
Family day care	57	25	13	4	1	100	181
Home-based	15	24	17	17	27	100	41
Occasional care	31	14	24	11	19	100	70
Other	21	15	26	24	15	100	34
All respondents	19	16	25	21	19	100	1,124
Going on longer excursions (eg museums)							
Long day care	17	48	13	9	13	100	954
Preschools	29	30	15	10	16	100	344
Family day care	56	25	13	4	3	100	183
Home-based	20	42	11	16	11	100	45
Occasional care	31	29	9	13	18	100	78
Other	21	37	16	16	11	100	38
All respondents	22	43	13	9	13	100	1,293
Going to a playgroup							
Long day care	16	45	15	10	14	100	951
Preschools	20	24	23	14	19	100	345
Family day care	32	21	24	14	8	100	179
Home-based	9	31	22	22	16	100	45
Occasional care	23	23	22	14	18	100	78
Other	18	26	18	24	13	100	38
All respondents	18	39	17	11	14	100	1,288
Going near water							
Long day care	4	3	11	13	68	100	912
Preschools	6	7	19	17	50	100	326
Family day care	8	9	21	19	43	100	168
Home-based	4	4	7	27	58	100	45
Occasional care	11	7	22	23	37	100	73
Other	11	13	8	32	37	100	38
All respondents	5	5	14	15	62	100	1,238

Notes: 'Other' category includes mobile services and school-based services. Note that these items are no longer sorted in descending order but are presented in the order in which they appeared in the survey.

Source: DoCS Parents' Internet Survey.

Population: All respondents for whom excursions were relevant (n varied between 1,144 and 1,261)

◇ 2.9 Provision of information to parents

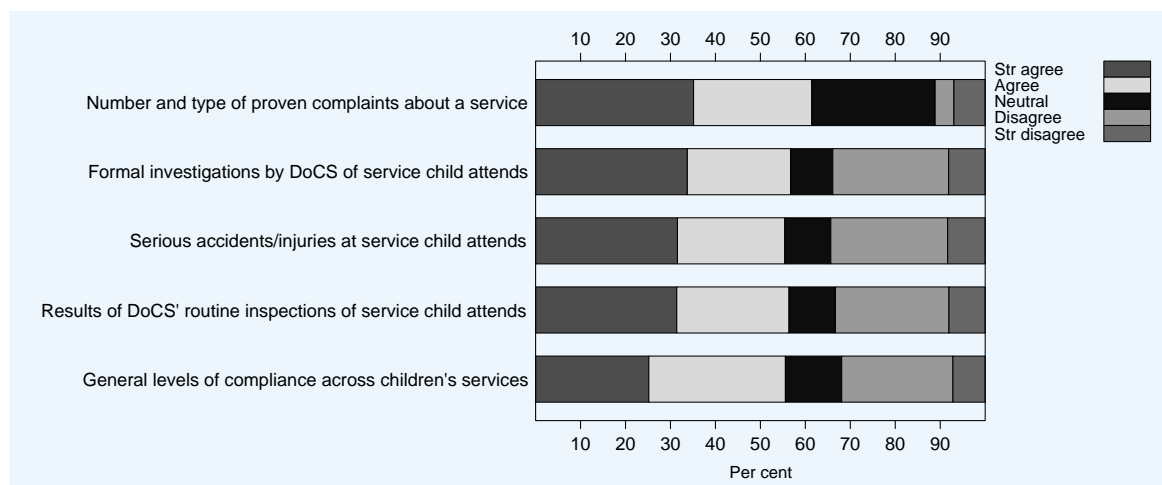
The survey sought to elicit opinions from parents about how much information about their child[ren]’s service should be made available by DoCS. A number of options were presented and parents were asked to agree or disagree with these. The results are shown in Figure 2.9 and Table 2.18.

With one exception, the level of support for most of the options was similar. The option which garnered the most support was for DoCS to make available the number and type of proven complaints made about a service. Some 61 per cent of parents ‘agreed’ (or ‘strongly agreed’) with this option and only 11 per cent ‘disagreed’ (or ‘strongly disagreed’). The remaining options had support in the mid-50 per cent range, but they also

had considerable opposition, with just over 30 per cent of parents opposing these options. A closer look at the data showed that among parents whose child[ren] attended long day care the levels of opposition were highest. As Table 2.19 shows, some 42 to 45 per cent of these parents expressed ‘disagreement’ or ‘strong disagreement’ across the various options.

It is worth noting that the ‘form surveys’ contribute considerably to these results. If these responses are omitted (as is done more comprehensively in Section 2.11 below), then the figures of 32–34 per cent for long day care services shown in Table 2.19 drop to 20–22 per cent.

Figure 2.9: Provision of information to parents



Source: DoCS Parents’ Internet Survey. See Table 2.18

Table 2.18: Provision of information to parents (%)

Type of information	Str agree	Agree	Neutral	Disagree	Str disag	Total
Number and type of proven complaints about a service	35	26	27	4	7	100
Formal investigations by DoCS of service child attends	34	23	9	26	8	100
Serious accidents/injuries at service child attends	32	24	10	26	8	100
Results of DoCS’ routine inspections of service child attends	31	25	10	25	8	100
General levels of compliance across children’s services	25	30	13	25	7	100

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

Table 2.19: Provision of information to parents, by type of service (%)

Type of service	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Total	n
Results of DoCS’ routine inspections of service child attends							
Long day care	28	19	9	33	10	100	1,009
Preschools	43	37	11	4	5	100	370
Family day care	38	40	18	3	2	100	186
Home-based	48	26	14	2	10	100	50
Occasional care	45	42	11	1	1	100	84
Other	44	34	17	0	5	100	41
All respondents	31	25	10	25	8	100	1,366
Formal investigations by DoCS of service child attends							
Long day care	29	19	8	33	10	100	1,009
Preschools	47	31	12	5	5	100	370
Family day care	45	34	13	4	3	100	186
Home-based	52	28	6	4	10	100	50
Occasional care	45	33	12	8	1	100	84
Other	44	39	10	2	5	100	41
All respondents	34	23	9	26	8	100	1,366
Serious accidents/injuries at service child attends							
Long day care	27	19	9	34	11	100	1,009
Preschools	43	33	15	5	4	100	370
Family day care	41	38	16	3	2	100	186
Home-based	50	30	8	2	10	100	50
Occasional care	43	37	11	7	2	100	84
Other	41	41	12	0	5	100	41
All respondents	32	24	10	26	8	100	1,366
General levels of compliance across children’s services							
Long day care	22	25	11	32	10	100	1,009
Preschools	36	42	15	4	4	100	370
Family day care	30	47	20	2	1	100	186
Home-based	32	46	10	8	4	100	50
Occasional care	35	45	14	2	4	100	84
Other	37	51	5	2	5	100	41
All respondents	25	30	13	25	7	100	1,366
Number and type of proven complaints about a service							
Long day care	30	22	34	5	9	100	1,009
Preschools	49	35	9	4	3	100	370
Family day care	44	38	15	3	1	100	186
Home-based	52	36	0	2	10	100	50
Occasional care	49	33	10	6	2	100	84
Other	49	37	5	2	7	100	41
All respondents	35	26	27	4	7	100	1,366

Notes: ‘Other’ category includes mobile services and school-based services. Note that these items are no longer sorted in descending order but are presented in the order in which they appeared in the survey.

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

◇ 2.10 Dealing with increased costs

Parents were advised in the survey that introducing changes to the Regulation to increase the quality of child care might result in increased child care costs. They were then asked how much more they were willing to pay (per child) for improvements in quality. They were also asked how such cost increases might influence their behaviour.

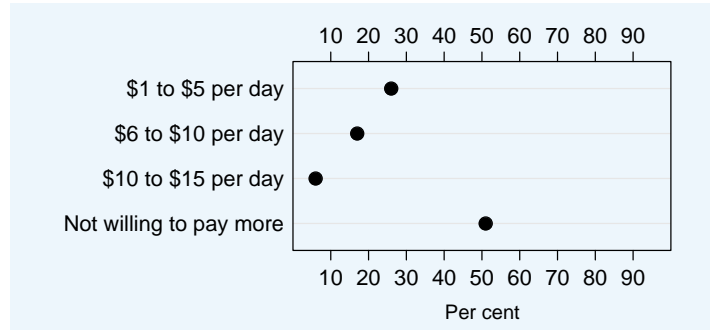
care while another 26 per cent indicated they would only pay up to \$5 per day. About 17 per cent indicated a willingness to pay between \$6 and \$10 per day and a small group (6 per cent) indicated they would pay between \$10 to \$15 per day. (See Figure 2.10 and 2.20).

Among parents child[ren] attended long day care, the proportion indicating they were ‘not willing to pay more’ was 58 per cent. This figure was much higher than the comparable figure among other parents (where it ranged from 34 per cent to 40 per cent). (See Table 2.21).

2.10.1 Willingness to pay more

About 51 per cent of parents said they were not willing to pay any more for child

Figure 2.10: Willingness to pay increased costs



Source: DoCS Parents’ Internet Survey. See Table 2.20

Table 2.20: Willingness to pay increased costs

Amount willing to pay	Number	Per cent
\$1 to \$5 per day	357	26
\$6 to \$10 per day	230	17
\$10 to \$15 per day	76	6
Not willing to pay more	703	51
Total	1,366	100

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

Review of the Children’s Services Regulation: Survey Results

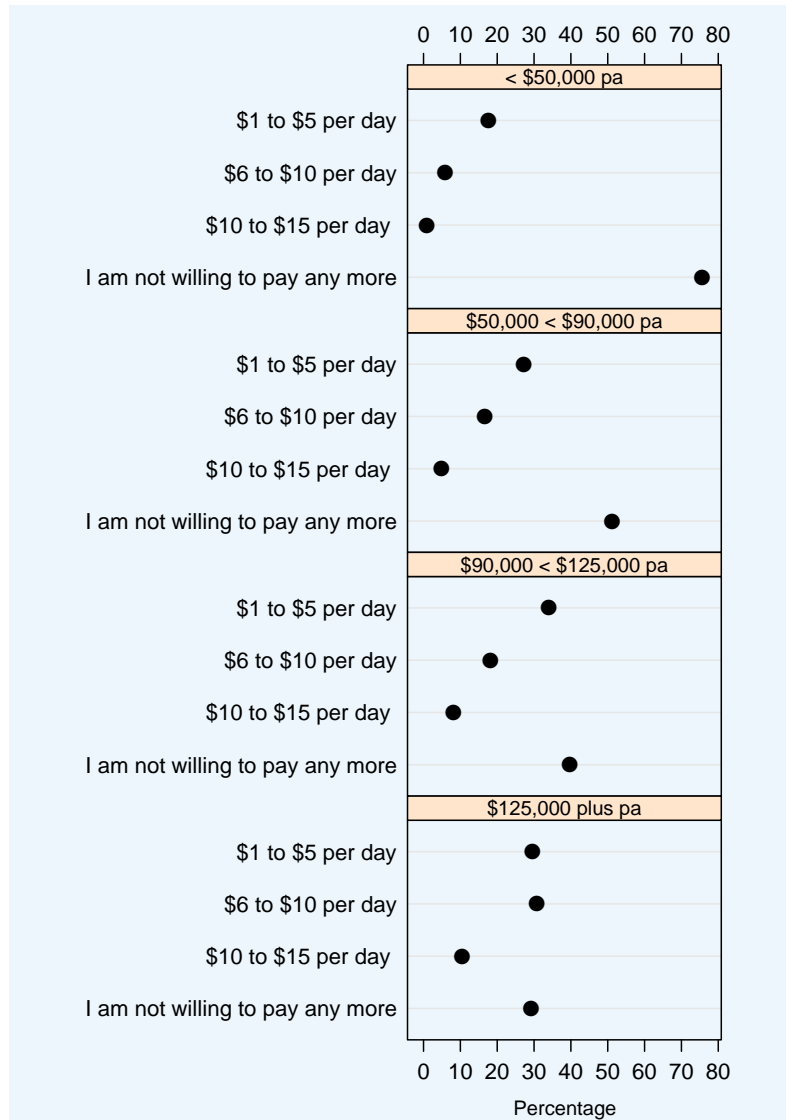
Table 2.21: Willingness to pay increased costs, by type of service (%)

Type of service	\$1 to \$5 per day	\$6 to \$10 per day	\$10 to \$15 per day	Not willing to pay more	Total	n
Long day care	22	15	5	58	100	1,009
Preschools	35	22	6	36	100	370
Family day care	40	26	4	30	100	186
Home-based	26	20	16	38	100	50
Occasional care	35	18	7	40	100	84
Other	37	22	7	34	100	41
All respondents	26	17	6	51	100	1,366

Notes: ‘Other’ category includes mobile services and school-based services.

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

Figure 2.11: Willingness to pay increased costs, by family income



Source: DoCS Parents’ Internet Survey. See Table 2.22

Table 2.22: Willingness to pay increased costs by family income (%)

Family income	\$1 to \$5 per day	\$6 to \$10 per day	\$10 to \$15 per day	Not willing to pay more	Total	n
< \$50,000 pa	18	6	1	76	100	340
\$50,000 < \$90,000 pa	27	17	5	51	100	408
\$90,000 < \$125,000 pa	34	18	8	40	100	297
\$125,000 plus pa	30	31	10	29	100	267

Notes: Respondents who did not know their family income have been omitted from this table.

Source: DoCS Parents’ Internet Survey. Population: All respondents providing information on family income (n = 1,312).

The survey collected data on family income, so this information was cross-tabulated against this question on child care costs. As Figure 2.11 and Table 2.22 show, those families on lower incomes were much less willing to pay any more. Some three quarters of families whose income was less than \$50,000 per annum were not willing to pay any more in child care costs. Among families whose income was \$125,000 per annum or more, this figure dropped to 29 per cent. Among these families, 30 per cent were willing to pay \$1 to \$5 per day more and another 31 per cent were willing to pay \$6 to \$10 per day more.

2.10.2 How respond to costs

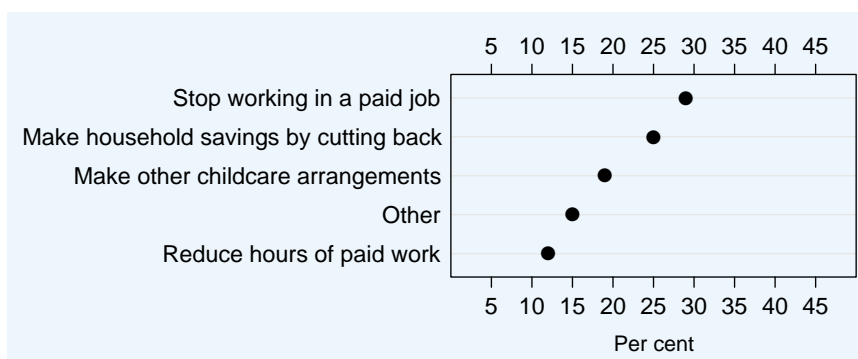
Parents were asked what their responses might be if the proposed changes to the Regulation increased the cost of child care and made it difficult for them financially. The most common response was to ‘stop working in a paid job’, an option endorsed by 29 per cent of parents. The second most common response was to ‘make household savings by cutting back other expenses’, an option chosen by 25 per cent of

parents. Another 19 per cent indicated they would ‘make other child care arrangements, such as making use of family or friends’, while about 12 per cent thought they might ‘reduce their hours of paid work’ (see Figure 2.12 and 2.23).

The expectation that they might stop working was more strongly voiced by parents with children in long day care. Some 36 per cent of them chose this option, though another 22 per cent of these parents also indicated they would make household savings. It is worth noting the influence of the ‘form surveys’ on these figures. This figure of 36 per cent drops to 23 per cent once the ‘form surveys’ are omitted from the analysis.

By way of contrast, no other group of parents nominated the stop working option to this degree, with most in the 10 to 13 per cent range. Among other parents, the most common responses were to make other arrangements (24 to 30 per cent range) and to make household savings (29 to 38 per cent). For parents in family day care, reducing their hours of work was an option among 20 per cent of them. (See Table 2.24 for full details).

Figure 2.12: How parents would respond to increased child care costs



Source: DoCS Parents’ Internet Survey. See Table 2.23

Table 2.23: How parents would respond to increased child care costs

Response	Number	Per cent
Stop working in a paid job	391	29
Make household savings by cutting back	339	25
Make other childcare arrangements	262	19
Other	208	15
Reduce hours of paid work	166	12
Total	1,366	100

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

Table 2.24: How parents would respond to increased child care costs, by type of service (%)

Type of service	Alternate	Reduce hrs	Stop working	Make hhold savings	Other	Total	n
Long day care	17	11	36	22	14	100	1,009
Preschools	24	15	10	32	19	100	370
Family day care	26	20	11	34	9	100	186
Home-based	30	4	2	38	26	100	50
Occasional care	30	12	13	29	17	100	84
Other	24	22	10	32	12	100	41
All respondents	19	12	29	25	15	100	1,366

Notes: ‘Other’ category includes mobile services and school-based services. Full wording of responses: ‘Make other child care arrangements (eg. family or friends)’; ‘Reduce your hours of paid work’; ‘Stop working in a paid job’; ‘Make household savings by cutting back other expenses’.

Source: DoCS Parents’ Internet Survey. Population: All respondents (n = 1,366).

The data on family income was used to see if these responses were sensitive to the level of family income. Figure 2.13 and Table 2.25 show the results of these cross-tabulations. The option of ‘stopping work’ was the strongest response among parents in low income families: nearly half of them indicated that this might be their response to increased child care costs. Among parents in the next income bracket the highest percentage endorsing the ‘stop working’ option was 29 per cent. In the two higher income brackets, the ‘make household savings’ option rated more highly than did stopping work.

Stopping work is, of course, the more extreme work-related option. Reducing

hours of work is a less extreme one, but still an option with implications for parents’ working lives. This combination of either stopping work or reducing hours also appears sensitive to family income. For families with less than \$50,000 annual income some 54 per cent fit into these two categories. For families in the two middle income brackets (from \$50,000 to under \$125,000) the proportion in this combination drops to around 40 per cent. In the highest income bracket this combination affects 26 per cent of parents. By way of contrast, in the highest income bracket a large percentage (43 per cent) of parents indicate they would cut back on their expenditure.

Table 2.25: How parents would respond to increased child care costs, by family income (%)

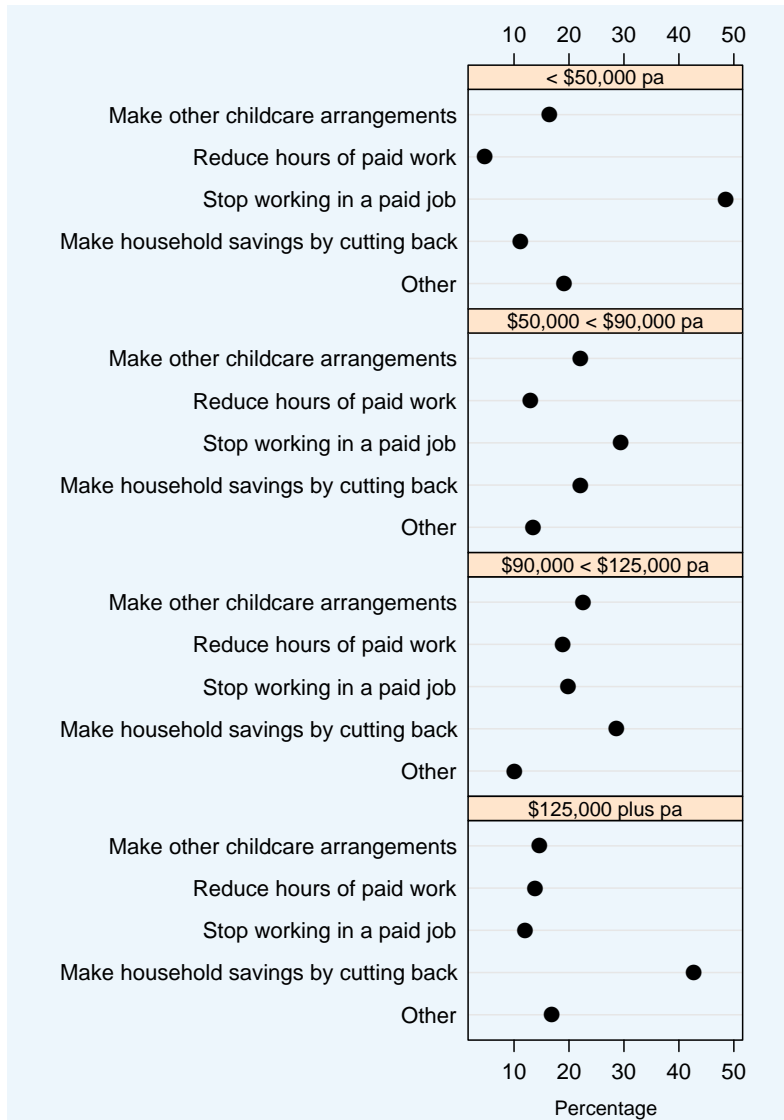
Family income	Alternate	Reduce hrs	Stop working	Make hhold savings	Other	Total	n
< \$50,000 pa	16	5	49	11	19	100	340
\$50,000 < \$90,000 pa	22	13	29	22	13	100	408
\$90,000 < \$125,000 pa	23	19	20	29	10	100	297
\$125,000 plus pa	15	14	12	43	17	100	267

Notes: See notes to Table 2.24 for full wording of the options.

Source: DoCS Parents’ Internet Survey.

Population: All respondents providing information on family income (n = 1,312).

Figure 2.13: How parents would respond to increased child care costs, by family income



Source: DoCS Parents’ Internet Survey. See Table 2.25

◇ 2.11 Selected findings for non-form survey respondents

As mentioned earlier, 166 survey responses were deemed to be ‘form surveys’, in that they appeared to be orchestrated responses. Two criteria were used for deciding what constituted a ‘form survey’:

1. the responses contained identical answers on a number of key issues related to staff qualifications, staff to child ratios, and parental responses to increased child care costs; and
2. the responses were lodged on two particular days.

To explore how the findings might differ if these ‘form surveys’ were omitted, some of the earlier figures and tables are reproduced in this section using a ‘reduced sample’.

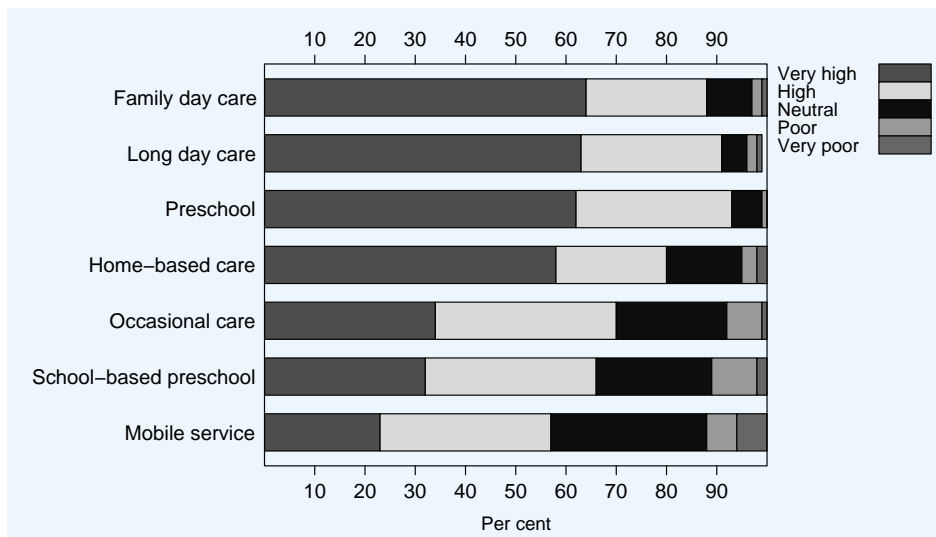
While this information is presented here to enable some comparison of the differences between the two samples, it should be noted that all survey responses were included in the sample reported on throughout the body of this report.

2.11.1 Overall assessment of children’s services

As mentioned earlier, parents were asked to assess the quality of the children’s services which they used. The full sample showed that long day care centres, preschools, family day care centres and home-based care arrangements were regarded favourably.

The results with the reduced sample are largely the same, with the figures for ‘very high’ quality ranging from 62 to 64 per cent (compared with 62 to 69 per cent in the full sample). The full details are shown in Figure 2.14 and Table 2.26.

Figure 2.14: How parents assess the quality of services, reduced sample



Source: DoCS Parents’ Internet Survey. See Table 2.26

Table 2.26: How parents assess the quality of services, reduced sample (%)

Services used by parents	Very high	High	Neutral	Poor	Very poor	Total
Family day care	64	24	9	2	2	101
Long day care	63	28	5	2	1	99
Preschool	62	31	6	1	1	101
Home-based care	58	22	15	3	3	101
Occasional care	34	36	22	7	1	100
School-based preschool	32	34	23	9	2	100
Mobile service	23	34	31	6	6	100

Notes: Total number of respondents exceeds 1,200 because multiple responses allowed. That is, parents had children in more than one type of service.

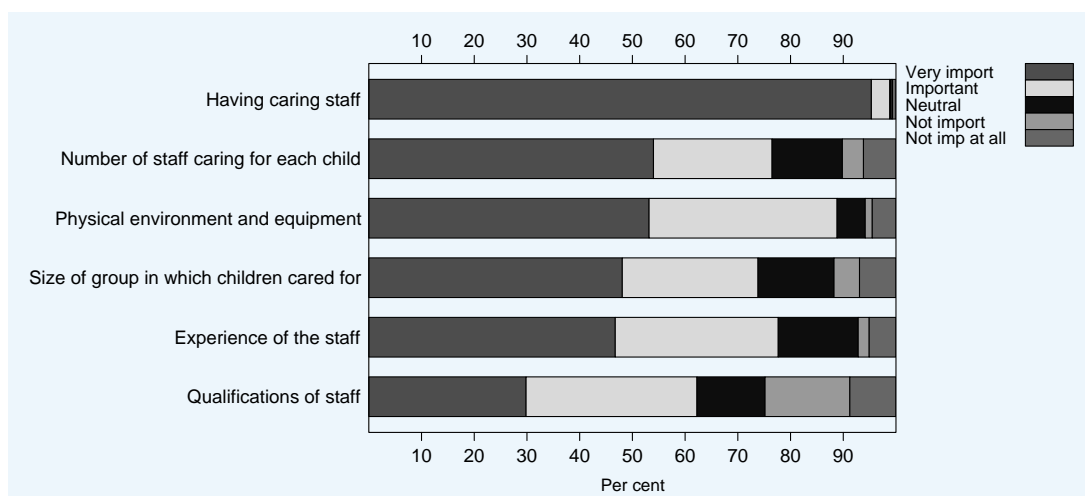
Source: DoCS Parents’ Internet Survey. Population: All respondents in reduced sample (n = 1,200).

2.11.2 Main priorities

Figure 2.15 and Table 2.27 show that the main priorities of parents remain similar to before, but with one important difference. With the reduced sample, the proportion of respondents emphasising the ‘number of staff caring for each child’ has increased considerably. Now some 54 per cent rate this as ‘very important’

(compared with 47 per cent before), which now put its slightly ahead of the proportion who rate ‘physical environment and equipment’ as very important (53 per cent). At the other end of the list, the proportion of respondents who rated the ‘qualifications of the staff’ as ‘not important’ or ‘not important at all’ has dropped from 33 per cent to 25 per cent in the reduced sample.

Figure 2.15: Main priorities of parents, reduced sample



Source: DoCS Parents’ Internet Survey. See Table 2.27

Table 2.27: Main priorities of parents, reduced sample (%)

Priority	Very imp	Important	Neutral	Not imp	Not imp at all	Total
Having caring staff	95	4	0	0	1	100
Number of staff caring for each child	54	22	13	4	6	100
Physical environment and equipment	53	36	5	1	4	100
Size of group in which children cared for	48	26	14	5	7	100
Experience of the staff	47	31	15	2	5	100
Qualifications of staff	30	32	13	16	9	100

Source: DoCS Parents’ Internet Survey. Population: All respondents in reduced sample (n = 1,200).

2.11.3 Staff qualifications

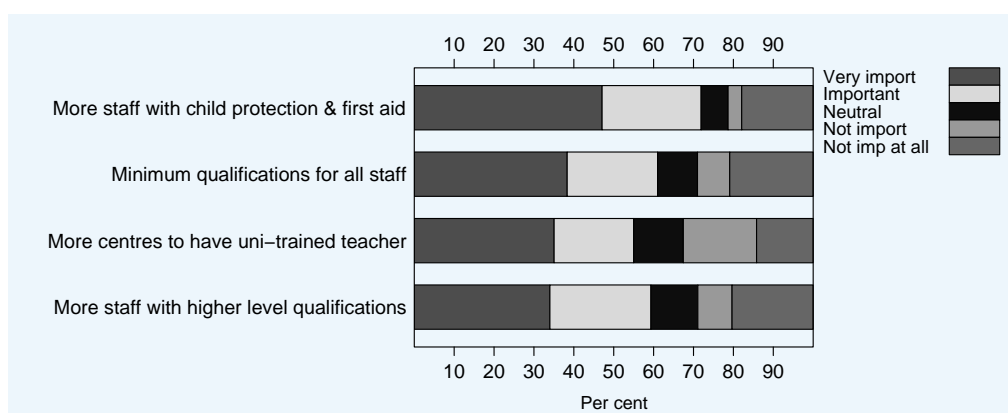
On the issue of changes to staff qualifications, the figures for this reduced sample are largely in line with the full sample. Nevertheless, there are some interesting differences.

The ordering of the options remains the same—most parents support having more staff with child protection and first aid qualifications—but it is notable that the extent of opposition to some of these options has fallen away.

In the full sample, around 38 to 40 per cent of respondents rated the bottom three options as either ‘not important’ or ‘not important at all’. In the reduced sample, this proportion fell to 29 to 32 per cent.

It is also worth noting that, compared with the full sample, the reduced sample showed support for all options at a slightly higher level (about 4 to 6 per cent). Nevertheless, this did not change the overall pattern. (See Table 2.28 for more details.)

Figure 2.16: Views on options for changes to staff qualifications, reduced sample



Source: DoCS Parents’ Internet Survey. See Table 2.28

Table 2.28: Views on options for changes to staff qualifications, reduced sample (%)

Options for changes	Very imp	Important	Neutral	Not imp	Not imp at all	Total
More staff with child protection & first aid	47	25	7	3	18	100
Minimum qualifications for all staff	38	23	10	8	21	100
More centres to have uni-trained teacher	35	20	12	18	14	100
More staff with higher level qualifications	34	25	12	9	20	100

Source: DoCS Parents’ Internet Survey.

Population: All respondents in reduced sample (n = 1,200).

2.11.4 Staff to child ratios

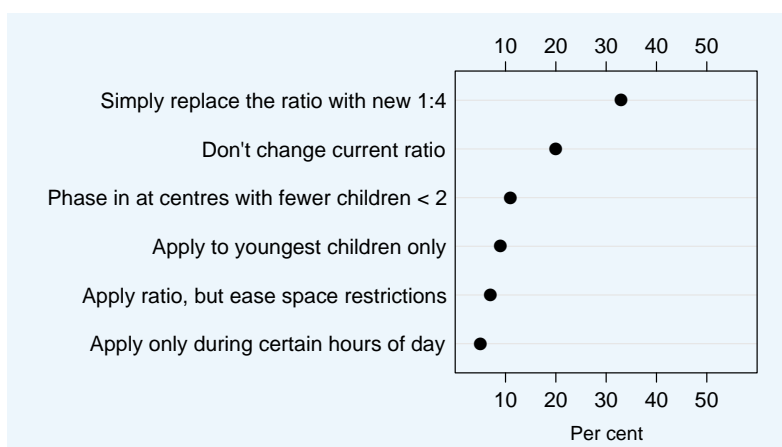
A more dramatic difference between the full sample and this reduced sample is evident in the item concerning staff to child ratios.

Whereas the full sample showed parents almost evenly divided on this issue, with 30 per cent wanting ‘no change’ and 29 per cent wanting the new ratio to simply

replace the old, the figures for the reduced sample are quite different. One third of parents in the reduced sample want the new ratio to simply replace the old, while the percentage who want ‘no change’ has dropped to one fifth. See Figure 2.29 and Table 2.29.

The remaining options are largely unchanged, both in their ranking and their magnitudes.

Figure 2.17: Staff to child ratios: proposed changes, reduced sample



Source: DoCS Parents’ Internet Survey. See Table 2.29

Table 2.29: Staff to child ratios: proposed changes, reduced sample

Options	Number	Per cent
Simply replace the ratio with new 1:4	400	33
Don't change current ratio	245	20
Phase in at centres with fewer children < 2	131	11
Apply to youngest children only	107	9
Don't know	91	8
Apply ratio, but ease space restrictions	86	7
Other	78	6
Apply only during certain hours of day	62	5
Total	1,200	99

Notes: Full wording of options: 1) 'Reducing the limit on the number of under 2 year olds to either two or three children' and 2) 'Allowing a family day or home-based carer to care for four children under two years, but no other children at the same time'

Source: DoCS Parents' Internet Survey.

Population: All respondents in reduced sample (n = 1,200).

2.11.5 Willingness to pay more

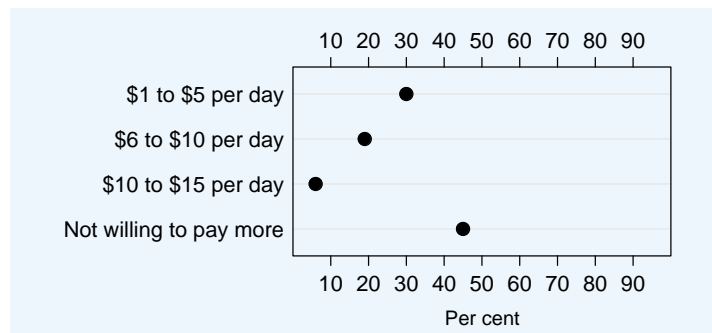
Compared with the full sample, the reduced sample shows a slightly smaller proportion of parents indicating that they are unwilling to pay more for child care.

Whereas in the full sample 51 per cent of parents said they were not willing to

pay any more, in the reduced sample this figure is 45 per cent.

The proportion willing to pay up to \$5 per day has increased slightly (from 26 per cent to 30 per cent), while the other results are largely the same as before. (See Figure 2.18 and 2.30).

Figure 2.18: Willingness to pay increased costs, reduced sample



Source: DoCS Parents' Internet Survey. See Table 2.30

Table 2.30: Willingness to pay increased costs, reduced sample

Amount willing to pay	Number	Per cent
\$1 to \$5 per day	357	30
\$6 to \$10 per day	230	19
\$10 to \$15 per day	76	6
Not willing to pay more	537	45
Total	1,200	100

Source: DoCS Parents’ Internet Survey. Population: All respondents in reduced sample (n = 1,200).

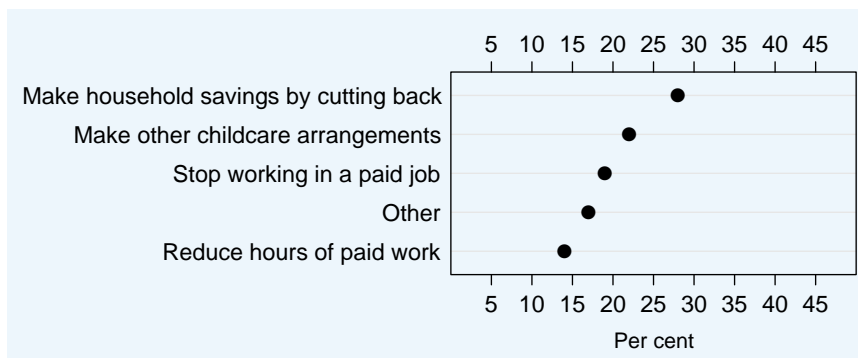
2.11.6 How respond to costs

Finally, in looking at how parents would respond to a potential increase in their child care costs, the differences between the full sample and the reduced sample are notable.

Whereas most parents in the full sample nominated stopping work (29 per cent),

in the case of the reduced sample the option of making household savings was the most common one (28 per cent) followed by making other child care arrangements (22 per cent). Stopping work was now ranked third, and was endorsed by 19 per cent of the reduced sample. (See Figure 2.19 and Table 2.31).

Figure 2.19: How parents would respond to increased child care costs, reduced sample



Source: DoCS Parents’ Internet Survey. See Table 2.31

Table 2.31: How parents would respond to increased child care costs, reduced sample

Response	Number	Per cent
Make household savings by cutting back	339	28
Make other childcare arrangements	262	22
Stop working in a paid job	225	19
Other	208	17
Reduce hours of paid work	166	14
Total	1,200	100

Source: DoCS Parents’ Internet Survey. Population: All respondents in reduced sample (n = 1,200).

◇ 3

Service Providers' Survey

◇ 3.1 Who responded to the survey?

As with the parents' survey, the DoCS service providers' survey was conducted as an online survey, and was open to the public for the same period (24 November 2008 to 14 December 2008). Again, people accessed the survey website via a link on the DoCS website. The survey form for service providers is reproduced in Appendix A.2.

After removing duplicates the final sample size was 1,145 respondents. For ease of expression the terms 'services', 'service providers' and 'respondents' are used interchangeably in this chapter of the report.

The actual respondents to the survey were mostly supervisors, licensees and staff. As Table 3.1 shows, some 42 per cent of respondents were supervisors in centre-based or mobile-services. Another 24 per cent were licensees in such services, while another 22 per cent were staff. The respondents who fell outside these categories ('other') tended to be respondents based in family day care and occasional care services.

Where information was available on the size of the service provider, the vast majority were single services, though a small percentage (some 11 per cent) were multiple services (Table 3.2).

Table 3.1: Respondents to the survey

	Number	Per cent
Authorised supervisor of centre based or mobile service	479	42
Licensee of centre based or mobile service	270	24
Staff of centre based or mobile service	248	22
Family day carer	178	16
Other	142	12
Authorised supervisor of family day care scheme	50	4
Licensee of family day care scheme	34	3
Home-based carer	24	2
All	1,145	100

Notes: Multiples allowed so totals exceed 1,145 and 100%.

Source: DoCS Service Providers' Internet Survey. *Population:* All respondents (n = 1,145).

Table 3.2: Organisational size of service providers

	Number	Per cent
1 service	387	34
2 to 5 services	100	9
6 or more services	28	2
Not licensee (or don’t know)	630	55
Total	1,145	100

Source: DoCS Service Providers’ Internet Survey.

Population: All respondents (n = 1,145).

Unlike the parents’ survey, where there is no data on the population against which the sample might be compared, with the the service providers the situation is different. The DoCS database contains information on service providers in NSW and this database can be used to compare the characteristics of the survey sample to the larger population. Table 3.3 provides data on some of these key characteristics, and also includes this comparison as an additional set of columns. It needs to be kept in mind that the ‘unit of analysis’ differs between these two columns. The population column is based on ‘services’ while the survey column is based on ‘respondents’ (and there can be multiple respondents within a single service).

Some 55 per cent of respondents were in long day care and another 30 per cent were in preschools. The next largest grouping was family day care (25 per cent), followed by the remaining services (in single figures). Because multiple responses were possible for this question the totals exceed 1,145 and 100 per cent. Because of the small numbers in the remainder of this report the school-based and mobile services are combined into a single ‘other’ category.

By way of comparison, long day care makes up 66 per cent of the population of services in NSW and preschools make up 23 per cent. It is not realistic to

compare the family day care figures, since the numbers in the population column represent ‘licensed schemes’ rather than carers per se. (As the DoCS Review’s *Discussion Paper* notes, there are some 3,632 carers covered by these schemes).

In terms of service category, some 38 per cent of respondents were private providers. A similar percentage (40 per cent) were community-based, not-for-profits and about 17 per cent were local councils. A comparison with the overall population is not possible at this level of detail, but by combining categories, it is possible to compare the relevant proportions of private providers. This shows that they make up 62 per cent of the overall population, but only 38 per cent of the survey sample.

Finally, when it comes to geographical distribution, Table 3.3 shows that about half of all respondents were in Sydney. The next largest grouping was in small regional centres (22 per cent). About 12 per cent were in Newcastle, the Central Coast or Wollongong, and another 11 per cent were in large regional centres.

To make comparisons with the DoCS database, collapsing categories is required. While the boundaries are not exactly comparable, the figures for the Newcastle etc / Hunter etc comparison show a close match, as do the figures for outer Sydney. On the other hand, the match is much weaker for inner Sydney and for rural and regional NSW.

Table 3.3: Characteristics of respondents and population comparisons (%)

	Internet Survey		Population	
	Number	Per cent	Number	Per cent
Type of service				
Long day care	625	55	2,260	66
Preschools	344	30	769	23
Family day care	288	25	102	3
Home-based	47	4	111	3
Occasional care	91	8	87	3
School-based	26	2	15	0
Mobile services	37	3	61	2
All respondents	1,145	100	3,405	100
Full category of service				
Private provider	440	38	–	–
Community-based not-for-profit	456	40	–	–
Local council	195	17	–	–
Other	54	5	–	–
Total	1,145	100	–	–
Short category of service				
Private provider	440	38	2,026	62
Other	705	62	1,229	38
Total	1,145	100	3,255	100
Full geographical area				
Inner Sydney	264	23	–	–
Outer Sydney	320	28	–	–
N'castle, W'gong ‡	133	12	–	–
Large regional	127	11	–	–
Small regional	257	22	–	–
Multiple locations	44	4	–	–
Total	1,145	100	–	–
Short geographical area				
Inner Sydney	264	23	1,092	32
Outer Sydney	320	28	966	28
Hunter, Illawarra †	133	12	365	11
Other	428	37	982	29
Total	1,145	100	3,405	100

Notes: The figure for 'All respondents' (in type of service) for internet survey is not a total, because multiples were allowed (totals will exceed 1,145 and 100%). Note that the figure for family day care in the DoCS population is for 'licensed schemes' and that these schemes are responsible for some 3,632 carers.

‡ 'Newcastle, Central Coast, Wollongong'.

† 'Hunter, Illawarra, Central Coast'.

Source: DoCS Service Providers' Internet Survey for survey column; DoCS database of licensed services for population column.

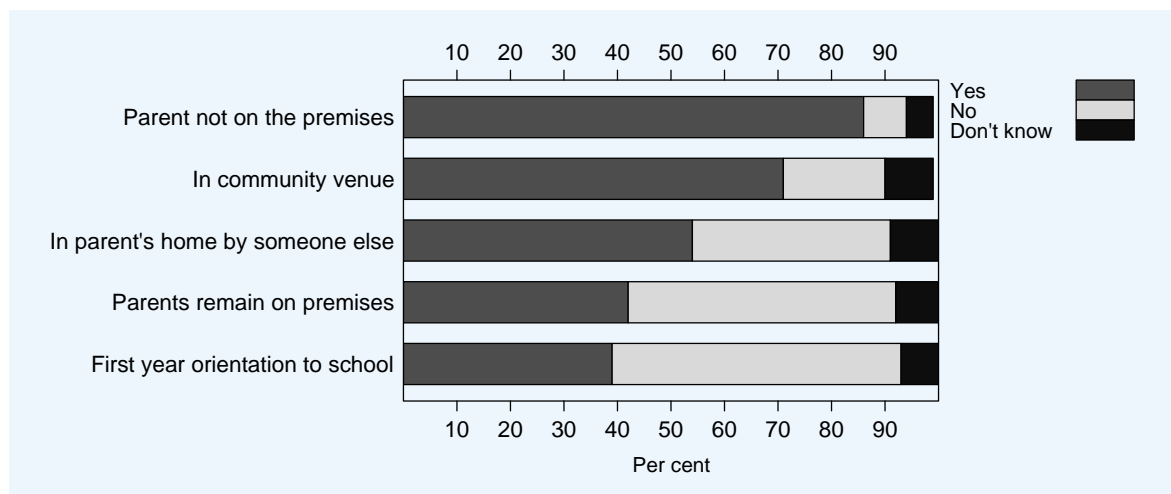
Population: n = 1,145 for Internet Survey; n = 3,405 for DoCS database. Note that certain exclusions were carried out on the population column to make it comparable with the survey column (hence the differing totals).

◇ 3.2 What should be regulated

At the outset the survey noted that not all children’s services in NSW were currently regulated and asked respondents to nominate which types of services should be regulated. The results are shown in Figure 3.1 and Table 3.4. A solid majority of respondents felt regulation should apply to those services where the parents were not on the premises (86 per cent) and where the care was provided in a

community venue, not usually used for child care (71 per cent). Where the care took place in a parent’s home by someone else, respondents were less sure, with 54 per cent nominating ‘yes’ and 37 per cent ‘no’. Finally, where parents remained on the premises and where care was provided by a school as part of orientation to school, the majority nominated ‘no’ to regulation (50 per cent and 54 per cent respectively).

Figure 3.1: Whether following should be regulated



Source: DoCS Service Providers’ Internet Survey. See Table 3.4

Table 3.4: Whether following should be regulated (%)

Type of service	Yes	No	Don't know	Total
Parent not on the premises	86	8	5	99
In community venue	71	19	9	99
In parent's home by someone else	54	37	9	100
Parents remain on premises	42	50	8	100
First year orientation to school	39	54	7	100

Source: DoCS Service Providers’ Internet Survey.
Population: All respondents (n = 1,145).

◇ 3.3 Staff to child ratios

Service providers were informed that the NSW Government had decided that there should be a ratio of 1 staff member for every 4 children (for under 2 year olds) in centre-based and mobile services. As in the parents' survey, they were then asked about the best way to introduce the new ratio. While the option of leaving the ratio at 5 to 1 was not included in the list, a large proportion chose 'other' and wrote in the 'no change' option in the text box provided on the survey form. Figure 3.2 and Table 3.5 show that this 'no change' option was the second most common response, with 16 per cent of service providers responding in this way.

The most common response, by a considerable margin, was to 'simply replace the ratio with the new 1 to 4 ratio', with 40 per cent of services supporting this option. The remaining options were endorsed by smaller proportions (between 5 and 12 per cent of services).

Respondents in long day care, family day care and home-based care expressed the most opposition to change, with some 20 per cent of the long day care respondents taking this position. Even within this type of service, however, a larger percentage (36 per

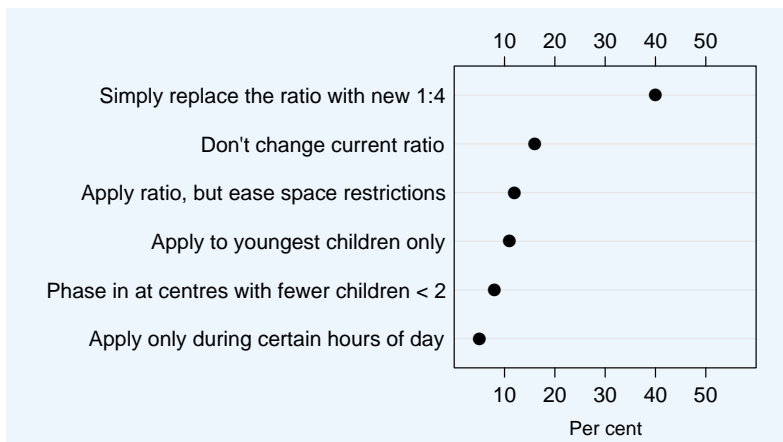
cent) wanted to see the ratio simply replaced. (See Table 3.6 and Figure 3.3.)

Turning to the category of the service provider, the opposition among private providers was high, with 29 per cent of these respondents not wanting to see any change. By way of contrast, among community-based not-for-profit services, only 3 per cent did not want change, and a majority (55 per cent) wanted to see the old ratio simply replaced by the new one. Among services provided by local councils some 44 per cent also wanted to see the ratio simply replace the old. (See Table 3.6 and Figure 3.4.)

There appeared to be little in the way of geographical patterns, though it seems there was greater support for the changed ratio in rural and regional NSW and weaker support in inner Sydney (though even here a greater proportion supported change). (See Table 3.6.)

Finally, those respondents who gave their position as either staff or authorised supervisors were more likely to prefer the ratio to be simply replaced. Only among licensees was the preferred position one of 'no change', but even for this group this was only marginally more popular than the 'simply replace' option. (See Table 3.6 and Figure 3.5.)

Figure 3.2: Staff to child ratios: proposed changes



Source: DoCS Service Providers’ Internet Survey. See Table 3.5

Table 3.5: Staff to child ratios: proposed changes

Options	Number	Per cent
Simply replace the ratio with new 1:4	460	40
Don't change current ratio	179	16
Apply ratio, but ease space restrictions	132	12
Apply to youngest children only	131	11
Phase in at centres with fewer children < 2	96	8
Apply only during certain hours of day	62	5
Other	50	4
Don't know	35	3
Total	1,145	99

Source: DoCS Service Providers’ Internet Survey.
Population: All respondents (n = 1,145).

Table 3.6: Staff to child ratios: proposed changes breakdown (%)

	Don't change	Replace	Ease space	Phase in	Youngest only	Core hours	Other	Don't know	Total	n
Type of service										
Long day care	20	36	13	6	11	6	6	2	100	625
Preschools	5	56	12	10	7	5	2	3	100	344
Family day care	18	34	7	11	17	5	3	5	100	288
Home-based	19	30	11	11	21	2	6	0	100	47
Occasional care	5	56	5	9	12	7	2	3	100	91
Other	4	56	14	11	5	7	0	4	100	57
All respondents	16	40	12	8	11	5	4	3	100	1,145
Category										
Private provider	29	22	12	7	15	4	8	2	99	440
Community †	3	55	12	10	7	7	2	3	99	456
Local council	14	44	8	7	15	4	3	6	101	195
Other	19	50	15	9	2	4	0	2	101	54
All respondents	16	40	12	8	11	5	4	3	100	1,145
Geography										
Inner Sydney	21	37	12	7	12	4	5	3	101	264
Outer Sydney	19	40	11	5	9	9	4	3	100	320
N'castle, W'gong ‡	12	39	14	7	14	7	6	1	100	133
Large regional	8	45	8	13	14	2	4	6	100	127
Small regional	11	42	14	12	12	3	4	3	101	257
Multiple locations	20	43	7	11	7	7	5	0	100	44
All respondents	16	40	12	8	11	5	4	3	100	1,145
Respondent position										
Licensee	29	24	13	4	15	3	10	3	100	270
Authorised supervisor	8	51	13	8	8	8	4	2	100	479
Staff	19	39	15	10	10	3	3	1	100	248

Notes: † 'Community-based not-for-profit'; ‡ 'Newcastle, Central Coast, Wollongong'. Full wording of options:

'Simply replace the current 1 to 5 ratio with the new 1 to 4 ratio';

'Apply the 1 to 4 ratio, and ease restrictions on use of space for affected services';

'Phase it in by applying it first to centres with more children under 2 before centres with fewer children under 2';

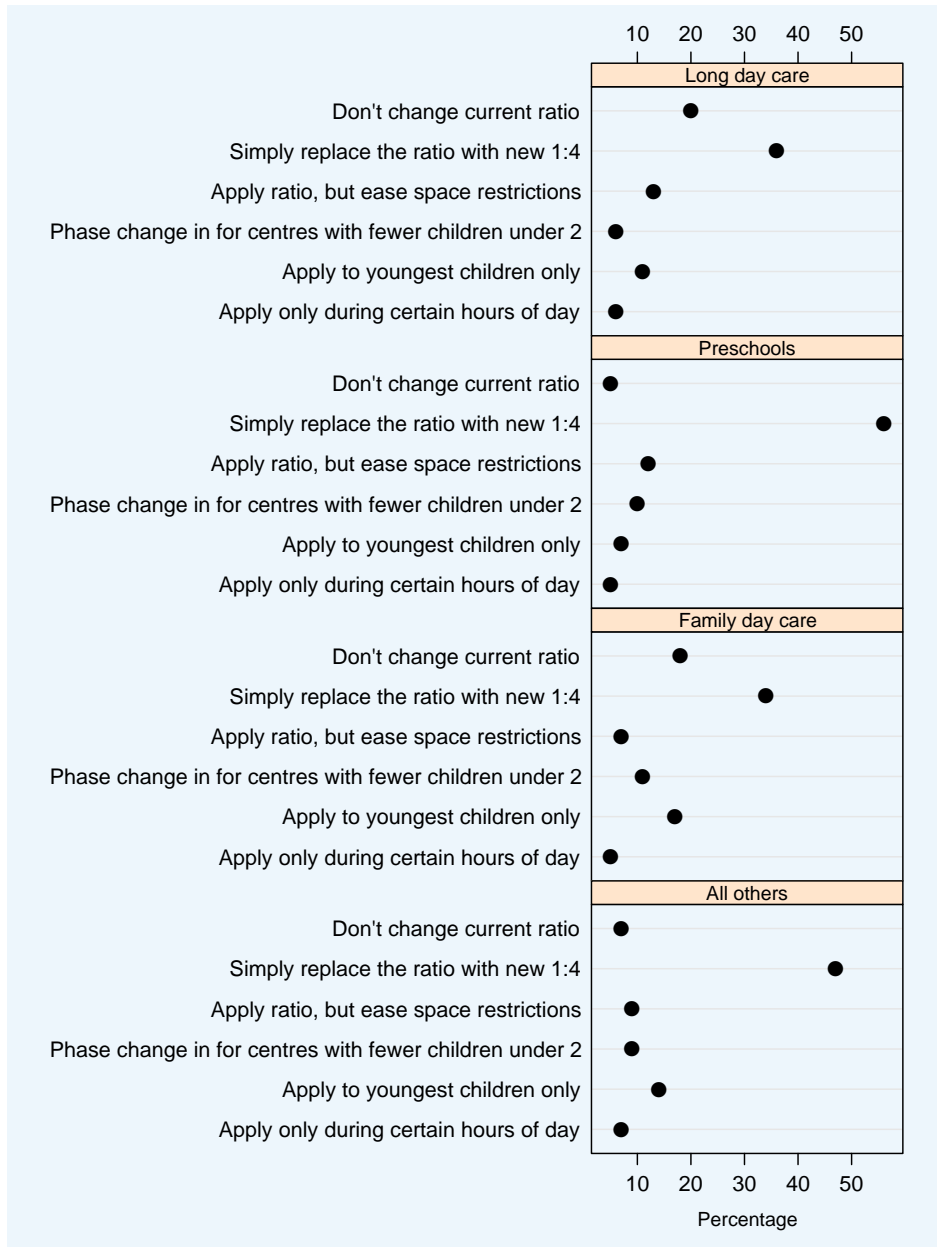
'Apply it to the youngest children only (those under 18 months)';

'Apply it only during certain parts of the day, such as core hours like 9am to 5pm';

The 'Don't change current ratio' answer was based on recoding open-ended responses to the 'Other' category.

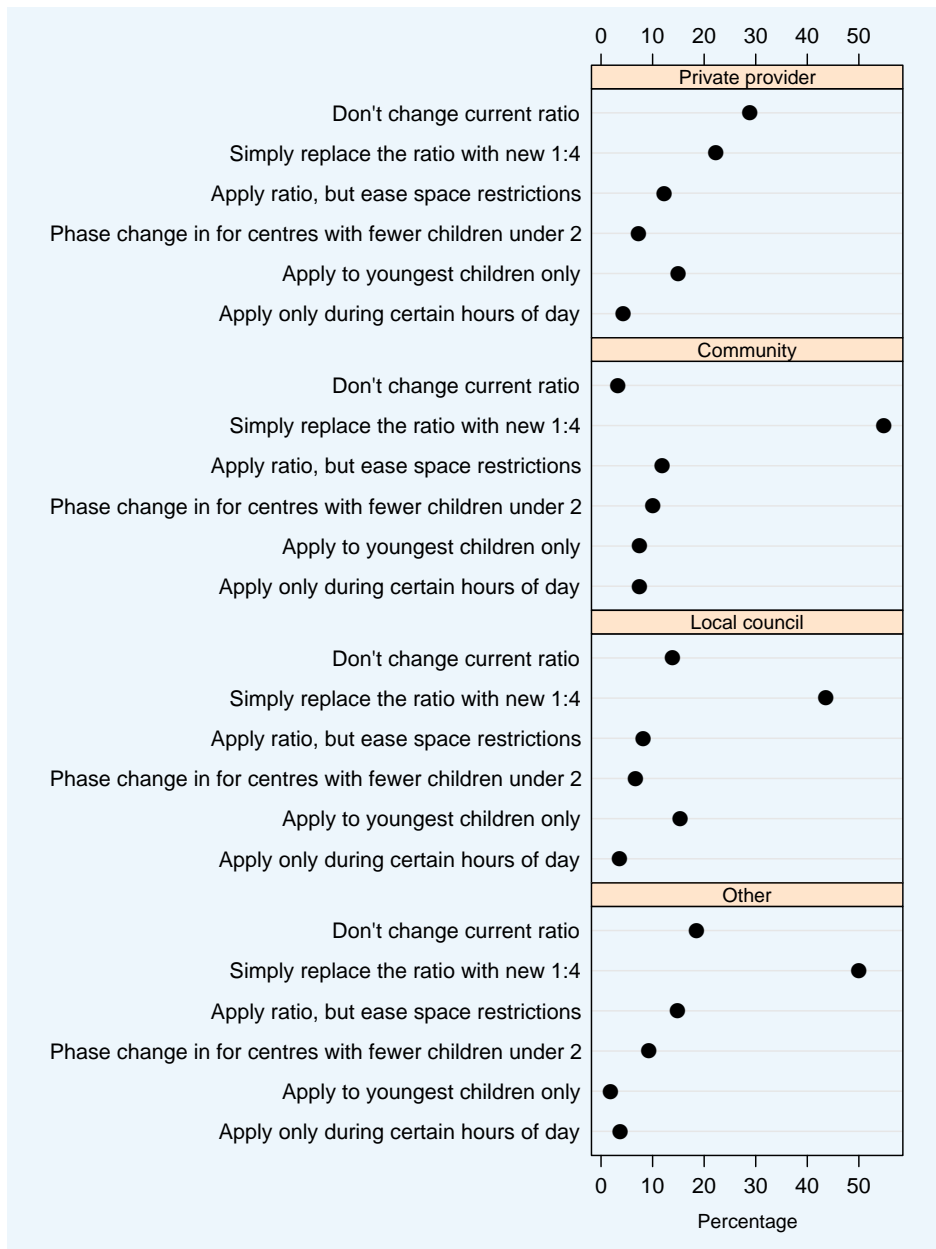
Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145), except for respondent position panel, where restricted to respondents in centre-based and mobile services.

Figure 3.3: Staff to child ratios: proposed changes by type



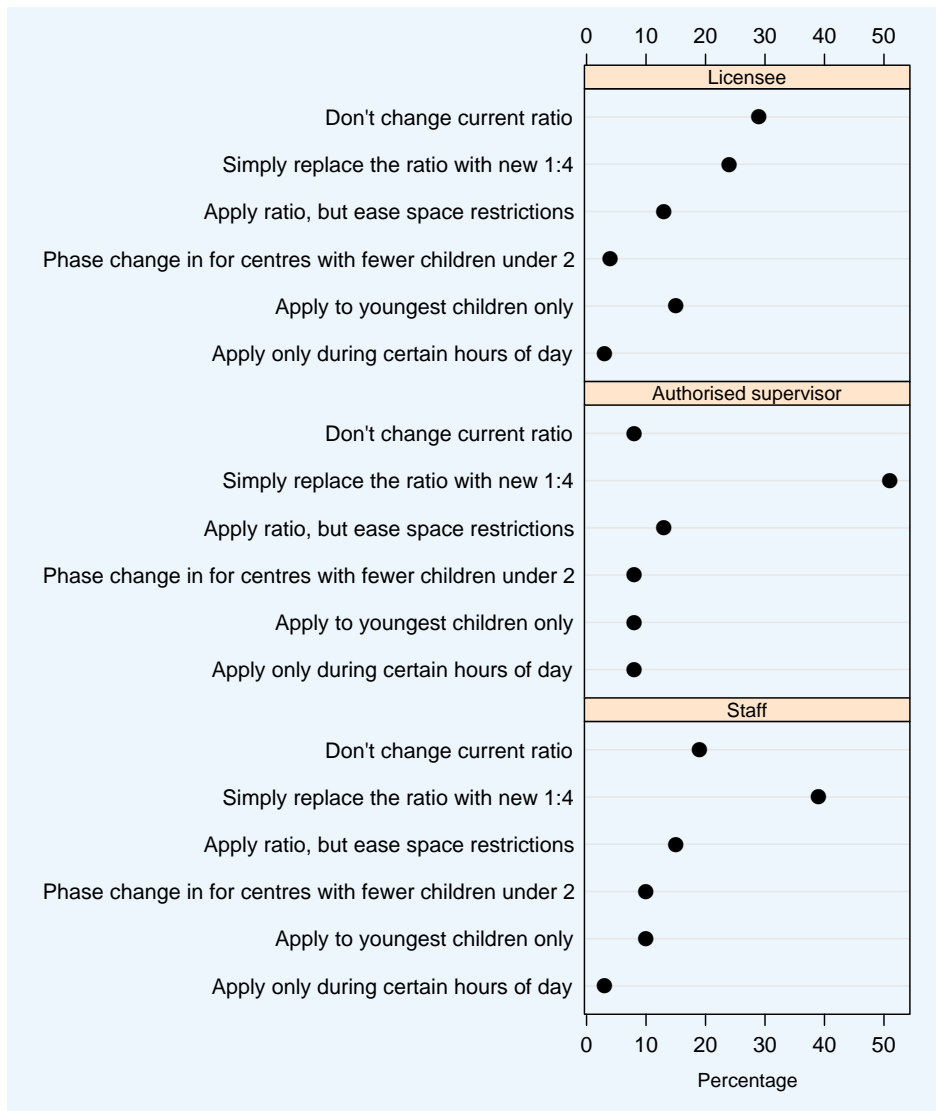
Source: DoCS Service Providers' Internet Survey. See Table 3.6

Figure 3.4: Staff to child ratios: proposed changes by category



Source: DoCS Service Providers' Internet Survey. See Table 3.6

Figure 3.5: Staff to child ratios: proposed changes by respondent position



Source: DoCS Service Providers' Internet Survey. See Table 3.6

◇ 3.4 Proposed changes to group size

Service providers were informed in the survey about the current Regulation requirements for group sizes in centre-based and mobile services. For those aged under 2, the maximum group size is 10. For those aged 2 to under 3, it is 16, and for those aged 3 to under 6, the requirement is 20. The survey then mentioned that one option under consideration was to keep the current requirements for under 2 year olds and 2 to under 3 year olds, but to remove the group size requirement for children aged 3 to under 6. Service providers were asked if they supported this option and if they were likely to make use of it. As a prelude to these questions, they were asked how important they considered group size requirements were for each of the main age groups.

3.4.1 Importance of group size requirements

As Figure 3.6 and Table 3.7 show, a large majority of respondents (74 per cent) thought group size requirements for the under 2 year olds was ‘very important’ and a smaller majority (54 per cent) thought them ‘very important’ for the 2 to under 3 year olds. When it came to 3 to under 6 year olds, some 38 per cent of respondents thought such requirements were ‘very important’,

though another 32 per cent thought them ‘important’.

In summary, whereas only about 9 to 11 per cent of respondents thought such requirements were either ‘not important’ or ‘not important at all’ for the two younger age groups, for the 3 to under 6 year olds this figure rose to 17 per cent. In other words, group size requirements were seen as either ‘important’ or ‘very important’ by the vast majority of respondents.

When these responses are examined by category of service provider, the importance of group size requirements in the two younger age groups is almost universally endorsed by all services except private providers (Table 3.8). Among this group of respondents, some 20 per cent (in the under 2 year olds) and 26 per cent (in the 2 to under 3 year olds) think such requirements are either ‘not important’ or ‘not important at all’. In terms of the oldest age group, the 3 to under 6 year olds, this sentiment is even stronger, with some 36 per cent of private providers taking this position. By way of contrast, among other category of service provider, the figures for ‘very important’ drop for this age group, but they tend to move to the ‘important’ or ‘neutral’ categories rather than to the ‘not important’ end of the scale.

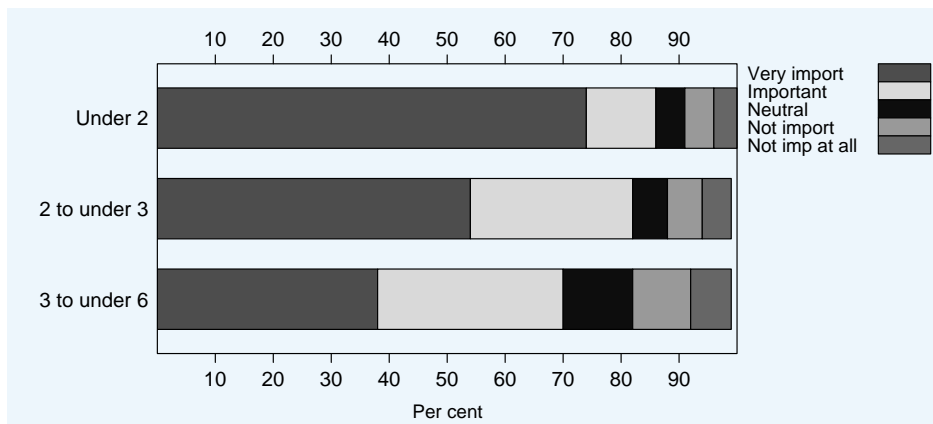
Table 3.7: Importance of group size requirements for age groups (%)

Age groups	Very imp	Important	Neutral	Not imp	Not imp at all	Total
Under 2	74	12	5	5	4	100
2 to under 3	54	28	6	6	5	99
3 to under 6	38	32	12	10	7	99

Source: DoCS Service Providers’ Internet Survey.

Population: All respondents to which the question was applicable (n = 1,145).

Figure 3.6: Importance of group size requirements for age groups



Source: DoCS Service Providers’ Internet Survey. See Table 3.7

Table 3.8: Importance of group size requirements for age groups, by category (%)

	Very imp	Important	Neutral	Not important	Not imp at all	Total	n
Under 2 year olds							
Private provider	51	18	10	11	9	99	440
Community-based not-for-profit	88	9	1	1	0	99	456
Local council	87	8	5	1	0	101	195
Other	89	6	4	2	0	101	54
Total	74	12	5	5	4	100	1,145
2 to under 3 year olds							
Private provider	30	32	11	15	11	99	440
Community-based not-for-profit	73	23	2	2	0	100	456
Local council	61	33	6	0	0	100	195
Other	69	26	2	4	0	101	54
Total	54	28	6	6	5	100	1,145
3 to under 6 year olds							
Private provider	21	27	16	20	16	100	440
Community-based not-for-profit	52	34	7	5	2	100	456
Local council	43	39	15	3	0	100	195
Other	44	37	13	4	2	100	54
Total	38	32	12	10	7	100	1,145

Source: DoCS Service Providers’ Internet Survey.

Population: All respondents to which the question was applicable (n = 1,145).

3.4.2 Support for changes to group size requirements

When it came to support for the idea of giving centres some flexibility in the size of groups for children aged 3 to under 6, respondents were divided. As Table 3.9 shows, some 38 per cent supported the option but 47 per cent opposed it (with 16 per cent unsure).

Among private providers, the level of support for this option was much stronger (at 59 per cent) and opposition much weaker (at 29 per cent). The situation was reversed among community-based not-for-profit respondents: some 27 per cent supported the option and 58 per cent opposed it. Services provided by local councils followed the pattern of the community-based not-for-profit respondents. (See Figure 3.7 and the second panel in Table 3.9.)

Among service provider types, respondents in long day care services showed high levels of support—some 49 per cent—and lower levels of opposition—some 38 per cent. Within

that support the percentage endorsing ‘strongly support’ was 28 per cent. Respondents in preschools were also divided, but with a greater percentage opposing (52 per cent) than supporting (36 per cent). Among other service types the support for changing this group size regulation was much weaker, with very small figures in the ‘strongly support’ category.

Geographical patterns were again muted, though services in regional areas were more strongly inclined towards opposition than support, while services in outer Sydney and the Newcastle - Central Coast - Wollongong area were more evenly divided.

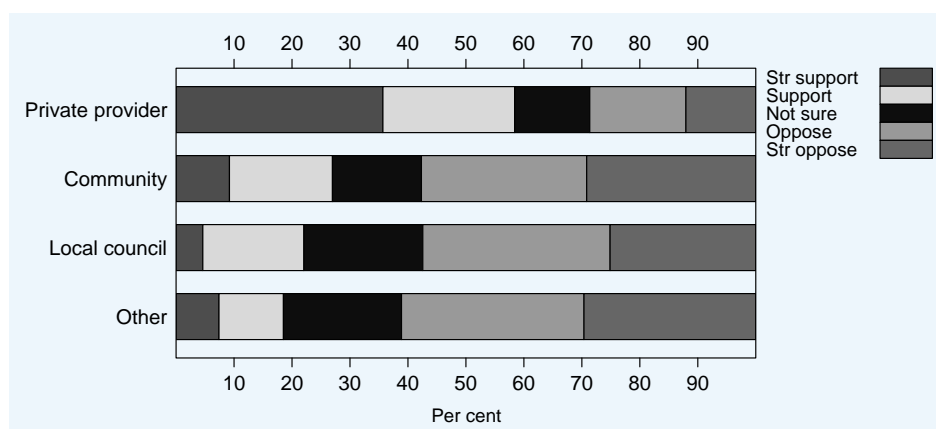
Finally, those respondents who gave their position as either staff or authorised supervisors were much less likely to ‘strongly support’ the proposed changes than were licensees (20 per cent among the former compared to 42 per cent among the latter). Indeed, nearly half of staff and supervisors either ‘opposed’ or ‘strongly opposed’ the proposed changes (see Table 3.6).

Table 3.9: Option to remove group size requirement for 3 to under 6s

Options	Number	Per cent
Strongly support	212	19
Support	221	19
Not sure	178	16
Oppose	283	25
Strongly oppose	251	22
Total	1,145	101

Source: DoCS Service Providers’ Internet Survey.
Population: All respondents (n = 1,145).

Figure 3.7: Option to remove group size requirement for 3 to under 6s, by category



Source: DoCS Service Providers' Internet Survey. See Table 3.10

Table 3.10: Option to remove group size requirement for 3 to under 6s, breakdown (%)

	Strongly support	Support	Not sure	Oppose	Strongly oppose	Total	n
Type of service							
Long day care	28	21	13	20	18	100	625
Preschools	16	20	11	24	28	100	344
Family day care	3	15	24	33	25	100	288
Home-based	2	21	23	21	32	100	47
Occasional care	3	19	15	40	23	100	91
Other	7	16	9	39	30	100	57
All respondents	19	19	16	25	22	100	1,145
Category							
Private provider	36	23	13	17	12	101	440
Community †	9	18	15	29	29	100	456
Local council	5	17	21	32	25	100	195
Other	7	11	20	31	30	99	54
All respondents	19	19	16	25	22	100	1,145
Geography							
Inner Sydney	22	17	13	23	24	99	264
Outer Sydney	22	22	16	21	20	101	320
N'castle, W'gong ‡	19	22	20	20	20	101	133
Large regional	7	17	18	30	28	100	127
Small regional	15	18	16	31	20	100	257
Multiple locations	23	18	7	25	27	100	44
All respondents	19	19	16	25	22	100	1,145
Respondent position							
Licensee	42	23	9	15	12	100	270
Authorised supervisor	19	20	14	24	24	100	479
Staff	21	21	13	23	21	100	248

Notes: † 'Community-based not-for-profit'; ‡ 'Newcastle, Central Coast, Wollongong'.

Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145), except for respondent position panel, where restricted to respondents in centre-based and mobile services.

3.4.3 Likelihood of using flexibility to increase numbers of 2 to 6 year olds

Separate from the group size issue, the survey asked a question about whether centre based and mobile services would make use of having the flexibility to increase the total number of places for 2 to 6 year olds (whilst still remaining within the total number of licensed places for children).

A majority of service providers (62 per cent) for whom this option was relevant indicated they were likely to take up this opportunity. Some 34 per cent indicated they were ‘very likely’ and another 28 per cent indicated they were ‘somewhat likely’ to make use of this flexibility. Only 8 per cent indicated they were ‘not likely at all’ and another 14 per cent indicated

they were ‘not likely’. (See Table 3.11.)

It was mainly among preschools that respondents indicated the least willingness to make use of this flexibility. Even so, almost half indicated they were likely to respond. Among long day care services the figure for willingness to make use of this option was quite high, at 69 per cent.

Community-based not-for-profit services also showed less willingness, with 33 per cent indicating they were unlikely to make use of the option (compared with 13 per cent among private providers).

Again, there were no distinct geographical patterns, though services in rural and regional NSW dropped below the average in the ‘very likely’ category. (See Table 3.12.)

Table 3.11: How likely to use flexibility to increase maximum numbers of 2–6 year olds

Options	Number	Per cent
Very likely	293	34
Somewhat likely	242	28
Neutral	140	16
Not likely	119	14
Not likely at all	70	8
Total	864	100

Source: DoCS Service Providers’ Internet Survey.

Population: All respondents providing centre-based or mobile services for whom the question was relevant (n = 864).

Table 3.12: How likely to use flexibility, breakdown (%)

	Very likely	Somewhat likely	Neutral	Not likely	Not likely at all	Total	n
Type of service							
Long day care	39	30	15	11	5	100	570
Preschools	28	22	16	18	16	100	265
Family day care	25	31	23	13	7	100	134
Home-based	33	29	21	4	12	100	24
Occasional care	31	39	10	9	10	100	67
Other	23	31	17	17	11	100	35
All respondents	34	28	16	14	8	100	864
Category							
Private provider	44	28	15	8	5	100	389
Community †	26	27	15	20	13	101	324
Local council	21	32	25	16	5	99	117
Other	29	29	21	6	15	100	34
All respondents	34	28	16	14	8	100	864
Geography							
Inner Sydney	36	29	13	15	7	100	207
Outer Sydney	38	30	14	11	7	100	234
N'castle, W'gong ‡	41	26	13	14	6	100	105
Large regional	25	25	23	16	11	100	83
Small regional	24	29	22	14	10	99	200
Multiple locations	46	20	17	11	6	100	35
All respondents	34	28	16	14	8	100	864

Notes: † 'Community-based not-for-profit'; ‡ 'Newcastle, Central Coast, Wollongong'.

Full wording of question: 'If you are involved in providing a centre-based or mobile children's service, how likely is it that you would make use of having the flexibility to increase the number of children in the 2 to under 6 age group while still keeping within the total numbers of children?'

Source: DoCS Service Providers' Internet Survey.

Population: All respondents providing centre-based or mobile services for whom the question was relevant (n = 864).

◆ 3.5 Excursions

Services were asked about the frequency of excursions for the children in their care. They were given a list of four aspects of excursions and asked to rate their frequency. As Figure 3.8 and Table 3.13 show, about one fifth of respondents indicated that going to local parks, schools and shops, and going to playgroups occurred frequently in their services.

Another 38 per cent indicated that going to local parks happened occasionally and about 25 per cent indicated that going on longer excursions happened occasionally. Only a small number indicated these kinds of excursions happened frequently. Excursions which took children near water were almost universally avoided, with 96 per cent of respondents indicating that these were rare or non-existent.

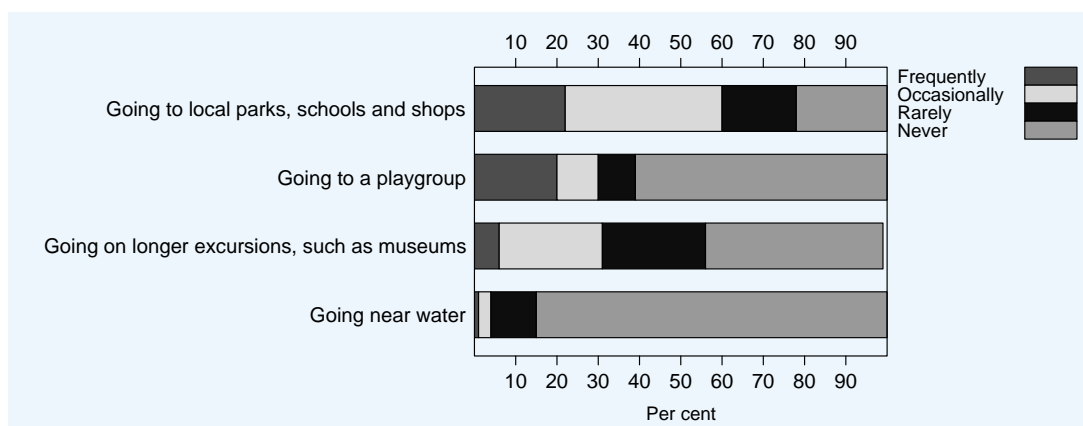
Among family day care services, excursions which went to local parks, schools and shops were common, with 68 per cent of respondents nominating frequent excursions and another 19 per

cent indicating occasional excursions. Home-based carers also made considerable use of these types of excursions. Among long day care and preschools, these types of excursions were very rare (see Table 3.14).

A similar pattern was evident when it came to longer excursions. Respondents in both family care care and home-based care indicated that longer excursions were frequent (55 per cent and 42 per cent respectively) or occasional (29 per cent and 30 per cent). Long day care and preschools were more prominent in this category than in the local park, schools and shops category. Some 50 per cent of long day care service providers went on longer excursions, either frequently or occasionally, while the figure for preschool respondents was 56 per cent.

In terms of playgroup excursions and excursions near water, most services showed similar patterns with no noteworthy differences.

Figure 3.8: Frequency of excursions



Source: DoCS Parents’ Internet Survey. See Table 3.13

Table 3.13: Frequency of excursions (%)

	Frequ- ently	Occas- ionally	Rarely	Never	Total	n
Going to local parks, schools and shops	22	38	18	22	100	1,069
Going to a playgroup	20	10	9	61	100	936
Going on longer excursions, such as museums	6	25	25	43	99	1,056
Going near water	1	3	11	85	100	1,053

Source: DoCS Service Providers' Internet Survey.

Population: All respondents for whom excursions were relevant (n varied between 936 and 1,069).

Table 3.14: Frequency of excursions, by type of service (%)

Type of service	Frequ- ently	Occas- ionally	Rarely	Never	Total	n
Going to local parks, schools & shops						
Long day care	3	8	10	79	100	478
Preschools	2	8	10	80	100	263
Family day care	68	19	5	9	100	269
Home-based	42	24	5	29	100	38
Occasional care	9	20	9	62	100	66
Other	8	39	3	50	100	36
All respondents	20	10	9	61	100	936
Going on longer excursions, eg. museums						
Long day care	11	39	22	28	100	569
Preschools	11	45	21	24	100	308
Family day care	55	29	9	8	100	276
Home-based	42	30	10	18	100	40
Occasional care	20	38	20	22	100	79
Other	13	51	16	20	100	45
All respondents	22	38	18	22	100	1,069
Going to a playgroup						
Long day care	5	26	24	46	100	564
Preschools	4	28	24	44	100	308
Family day care	10	28	32	30	100	266
Home-based	12	22	20	45	100	40
Occasional care	10	25	24	41	100	79
Other	15	28	30	26	100	46
All respondents	6	25	25	43	100	1,056
Going near water						
Long day care	0	3	9	87	100	563
Preschools	0	5	13	83	100	310
Family day care	1	3	13	83	100	263
Home-based	0	8	16	76	100	38
Occasional care	3	9	11	78	100	76
Other	4	15	20	61	100	46
All respondents	1	3	11	85	100	1,053

Source: DoCS Parents' Internet Survey.

Population: All respondents for whom excursions were relevant (n varied between 936 and 1,069).

3.5.1 Making excursions safer

Service providers were also asked which measures to make excursions safer they supported. The two main options canvassed were requiring services to undertake risk assessments prior to the excursion or requiring higher staff to child ratios.

The clear preference of respondents was for the former, with 45 per cent supporting this option. Some 34 per cent supported the second option, and 20 per cent nominated the ‘other’ category. (See Table 3.15.)

In family day care, the gap favouring risk assessment over higher ratios was quite wide (49 percentage points), whereas it was somewhat narrower for home-based care (17 per cent) and long day care (13 per cent). On the other hand, among respondents in preschools the preference was reversed, with those favouring a higher ratio (49 per cent)

outnumbering those favouring risk assessment (37 per cent).

Turning to category of service, respondents in community-based not-for-profit services favoured each option equally (44 to 45 per cent) whereas respondents working in local council-provided services had a much greater preference for risk assessments (64 per cent) over higher ratios (23 per cent). Among private providers, the split was more even, with a large proportion (over a third) indicating they wanted the ‘other’ option. This ‘other’ category mainly consisted of those who did not conduct excursions, or those who wanted both options, plus a range of other diverse opinions.

Finally, in all regions the dominant view was for risk assessments over higher ratios. The gap was narrowest in inner Sydney (just 2 percentage points) and widest in large regional centres (37 percentage points). (See Table 3.16).

Table 3.15: Risk assessment and excursions

Options	Number	Per cent
Require risk assessment prior to excursion	520	45
Require higher staff to child ratios	394	34
Other	231	20
Total	1,145	99

Source: DoCS Service Providers’ Internet Survey.

Population: All respondents providing centre-based or mobile services for whom question was relevant (n = 1,145).

Table 3.16: Risk assessment and excursions, breakdown (%)

	Assessment¶	Ratios§	Other	Total	n
Type of service					
Long day care	40	33	26	100	625
Preschools	37	49	14	100	344
Family day care	68	17	15	100	288
Home-based	53	36	11	100	47
Occasional care	52	43	5	100	91
Other	54	40	5	100	57
All respondents	45	34	20	100	1,145
Category					
Private provider	37	30	34	101	440
Community †	45	44	11	100	456
Local council	64	23	13	100	195
Other	56	31	13	100	54
All respondents	45	34	20	100	1,145
Geography					
Inner Sydney	39	37	24	100	264
Outer Sydney	44	36	21	101	320
N'castle, W'gong ‡	43	38	19	100	133
Large regional	61	24	15	100	127
Small regional	46	35	19	100	257
Multiple locations	59	20	20	99	44
All respondents	45	34	20	100	1,145

Notes: Full wording of options: ¶'Requiring services to undertake a risk assessment prior to an excursion'; §'Higher staff to child ratios'.

Abbreviations: † 'Community-based not-for-profit'; ‡ 'Newcastle, Central Coast, Wollongong'.

Population: All respondents (n = 1,145)

◇ 3.6 Staff qualifications

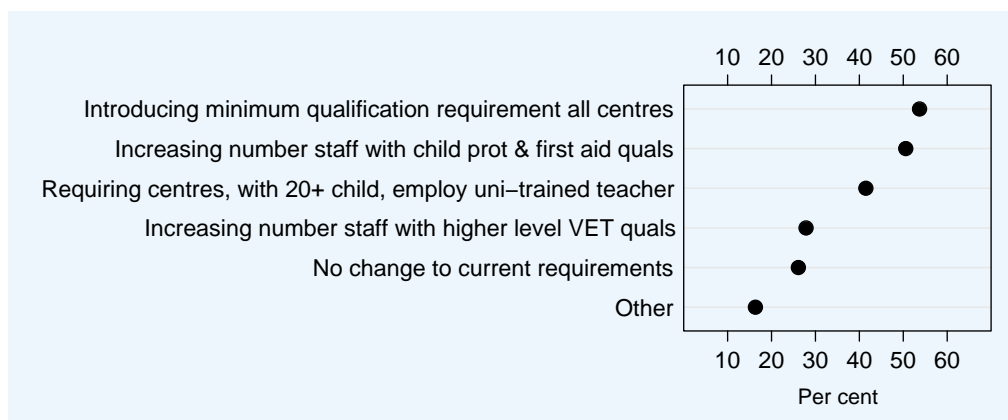
3.6.1 Responses to options

Service providers were asked for their views on possible changes to the qualification requirements for staff in children's services. Five options were presented, as well as a 'no change' option, and respondents were asked to nominate up to three of these options as having the most benefit for children. The findings for this question are shown in Figure 3.9 and in Table 3.17.

The two options which rated most highly were introducing minimum qualification

requirements for all centres (54 per cent) and increasing the number of staff with child protection and first aid qualifications (51 per cent). The next most favoured option, at 41 per cent, was requiring centres, with 20 or more children, to employ a university-trained early childhood teacher. The lowest levels of support were for increasing the number of staff with higher level VET qualifications (28 per cent) and not making any changes at all (26 per cent). (Note that because multiples were allowed, the totals exceed 100 per cent).

Figure 3.9: Which staff qualifications most benefit children



Source: DoCS Service Providers’ Internet Survey. See Table 3.17

Table 3.17: Which staff qualifications most benefit children (%)

Options	Number	Per cent
Introducing minimum qualification requirement all centres	615	54
Increasing number staff with child prot & first aid quals	579	51
Requiring centres, with 20+ child, employ uni-trained teacher	475	41
Increasing number staff with higher level VET quals	319	28
No change to current requirements	299	26
Other	187	16
Don’t know	12	1

Notes: Totals add to more than 1,145 (and more than 100%) because multiples were allowed. Respondents were asked to nominate three options. Percentages show percentage of respondents nominating that option (not percentage of nominations).

Source: DoCS Service Providers’ Internet Survey.

Population: All respondents (n = 1,145).

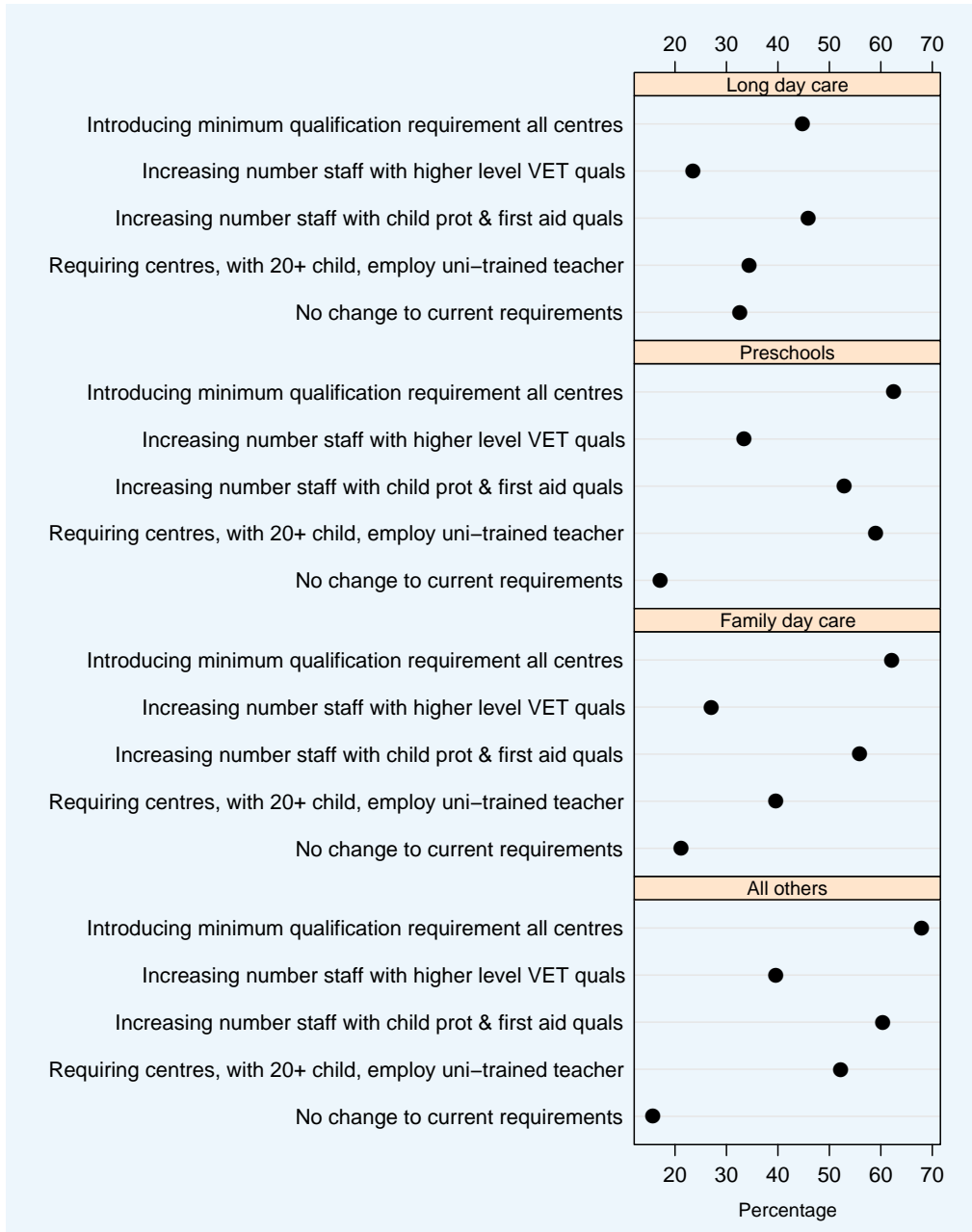
The responses by different different service types are shown in Figure 3.10 and Table 3.18 and indicate that the pattern among long day care respondents mirrored the overall averages. Among preschools, on the other hand, there was a much stronger preference for the university-trained teacher option and very weak support for the ‘no change’ option. Family day care respondents also differed from the long day care respondents, with slightly greater support for minimum qualifications in all centres and with weaker support for the ‘no change’ option.

Across the different categories of service provider some sharp differences were evident (see Figure 3.11 and Table 3.18). In particular, respondents in private provider services favoured ‘no

change’ very strongly, and indeed it had top ranking at 45 per cent. By way of comparison, among other respondents this option garnered no more than 15 per cent. The second most popular option for private providers was increasing the number of staff with child protection and first aid qualifications (41 per cent).

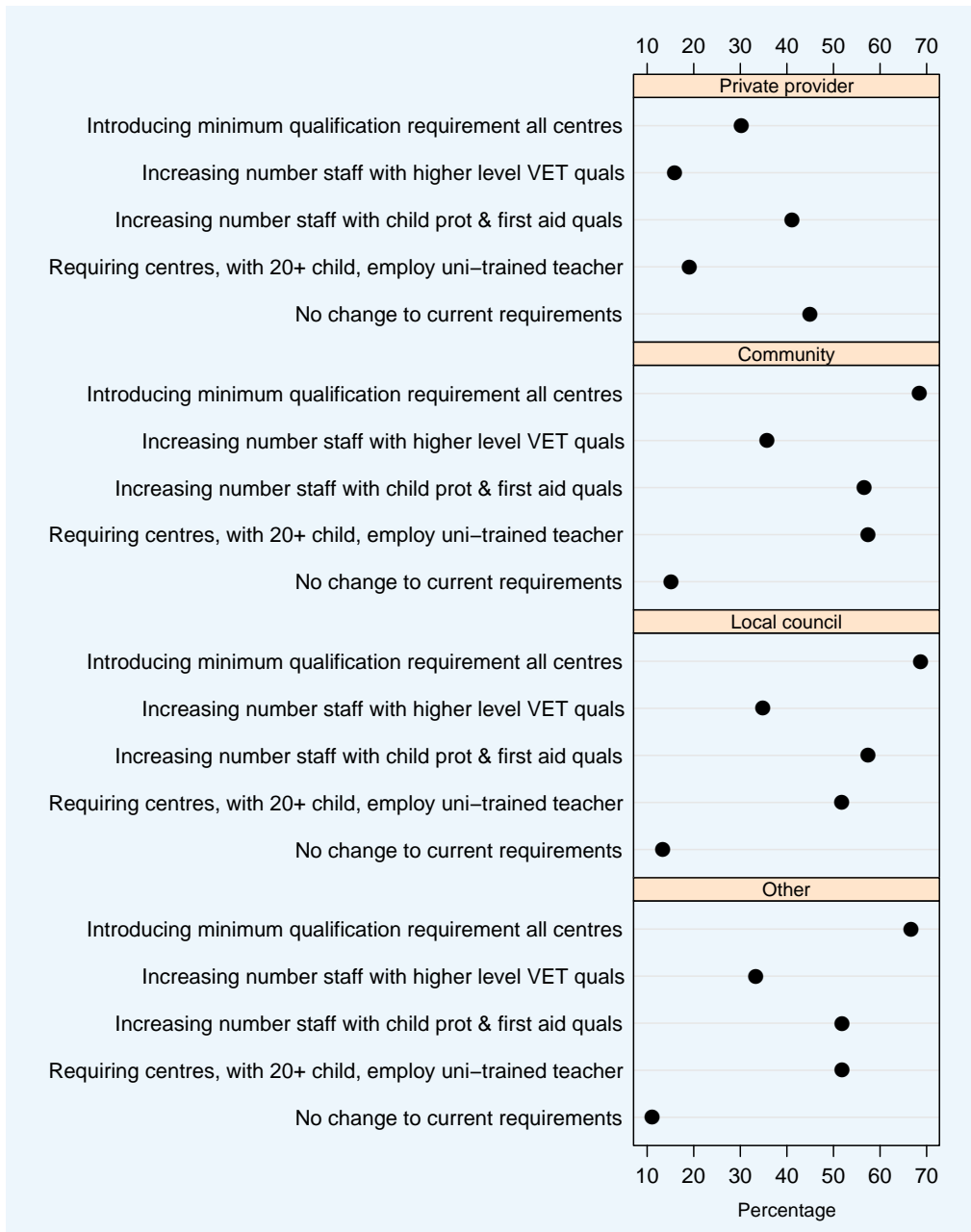
Among community-based not-for-profits services and local council provided services, the most popular options were introducing minimum qualifications in all centres (68 to 69 per cent), the child protection/first aid option (57 per cent) and the university-trained teacher option (57 and 52 per cent). Among private providers, the university-trained teacher option had very low support (19 per cent).

Figure 3.10: Which staff qualifications most benefit children, by type



Source: DoCS Service Providers’ Internet Survey. See Table 3.18

Figure 3.11: Which staff qualifications most benefit children, by category



Source: DoCS Service Providers’ Internet Survey. See Table 3.18

Table 3.18: Which staff qualifications most benefit children, breakdown (column %)

Options	Type of service			
	Long	Pre	Fam	Other
Introducing minimum qualification requirement all centres	45	62	62	68
Increasing number staff with higher level VET quals	24	33	27	40
Increasing number staff with child prot & first aid quals	46	53	56	60
Requiring centres, with 20+ child, employ uni-trained teacher	34	59	40	52
No change to current requirements	33	17	21	16
Don't know	1	1	3	1
Other	23	11	10	9

Options	Category of service			
	Priv	Comm	Counc	Other
Introducing minimum qualification requirement all centres	30	68	69	67
Increasing number staff with higher level VET quals	16	36	35	33
Increasing number staff with child prot & first aid quals	41	57	57	52
Requiring centres, with 20+ child, employ uni-trained teacher	19	57	52	52
No change to current requirements	45	15	13	11
Don't know	0	1	2	6
Other	29	7	9	17

Notes: Type of service: Long = Long day care; Pre = Preschools; Fam = Family day care; Other = All other services. Category of service: Priv = Private provider; Comm = Community-based not-for-profit; Counc = Local council; Other = All other categories. Totals add to more than 100% because multiples allowed. Respondents were asked to nominate three options. Percentages show percentage of respondents nominating that option (not percentage of nominations). Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145).

3.6.2 Application of minimum qualifications

Service providers were informed that if any changes were introduced to require minimum qualifications, or upgraded qualifications for staff and carers, then this would be phased in over time. This would give existing staff and carers an opportunity to gain qualifications and/or have their prior experience recognised. Respondents were then asked to decide which services they thought this minimum qualifications requirement

should apply to. They were given three choices: only staff in centre-based services and mobile services; all staff in all types of services; and a 'no change' option.

As Table 3.19 shows, a majority of respondents (57 per cent) felt that the requirement should apply to all staff in all types of children's services. A sizeable minority (30 per cent) preferred no change, and a smaller proportion (14 per cent) opted for only staff in centre-based services and mobile services.

Table 3.19: To whom should minimum qualifications apply

Options	Number	Per cent
All staff in all types of children's services	649	57
I don't think such a requirement should be introduced	341	30
Only staff in centre-based services and in mobile services	155	14

Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145).

The breakdown of these results by type of service and category show some distinct patterns (Table 3.20). Among long day care respondents, a bare majority (51 per cent) supported the 'all services' option while a large minority (41 per cent) supported the 'no change' option.

This contrasted sharply with other services. Among occasional care services, and in preschools, the level of support for 'all services' was 76 per cent and 66 per cent respectively, with only 11 per cent (and 21 per cent) preferring 'no change'.

Among private providers, a majority (57 per cent) favoured 'no change', though a considerable proportion (36 per cent) chose the 'all services' option. Among both community-based not-for-profit services and local council-provided services, a large majority (69 per cent) favoured the 'all services' option and only 11 to 13 per cent favoured 'no change'.

Respondents located in Sydney were less supportive of the 'all services' option (though still in the majority) while rural and regional respondents were more strongly supportive of this option (in the 60 to mid-60 per cent range).

Table 3.20: To whom should minimum qualifications apply, breakdown (%)

	Centre based¶	All staff§	No change*	Total	n
Type of service					
Long day care	8	51	41	100	625
Preschools	13	66	21	100	344
Family day care	24	59	17	100	288
Home-based	26	60	15	100	47
Occasional care	13	76	11	100	91
Other	11	81	9	100	57
All respondents	14	57	30	100	1,145
Category					
Private provider	7	36	57	100	440
Community †	18	69	13	100	456
Local council	19	69	11	99	195
Other	7	78	15	100	54
All respondents	14	57	30	100	1,145
Geography					
Inner Sydney	13	50	37	100	264
Outer Sydney	15	52	33	100	320
N'castle, W'gong ‡	8	65	27	100	133
Large regional	15	66	19	100	127
Small regional	13	61	26	100	257
Multiple locations	16	55	30	101	44
All respondents	14	57	30	100	1,145

Notes: Full wording of options: ¶'Only staff in centre-based services and in mobile services'; §'All staff in all types of children's services'; * 'I don't think such a requirement should be introduced'.

Abbreviations: † 'Community-based not-for-profit'; ‡ 'Newcastle, Central Coast, Wollongong'.

Source: DoCS Service Providers' Internet Survey.

Population: All respondents (n = 1,145)

◇ 3.7 Compliance and enforcement

3.7.1 Severity of penalties

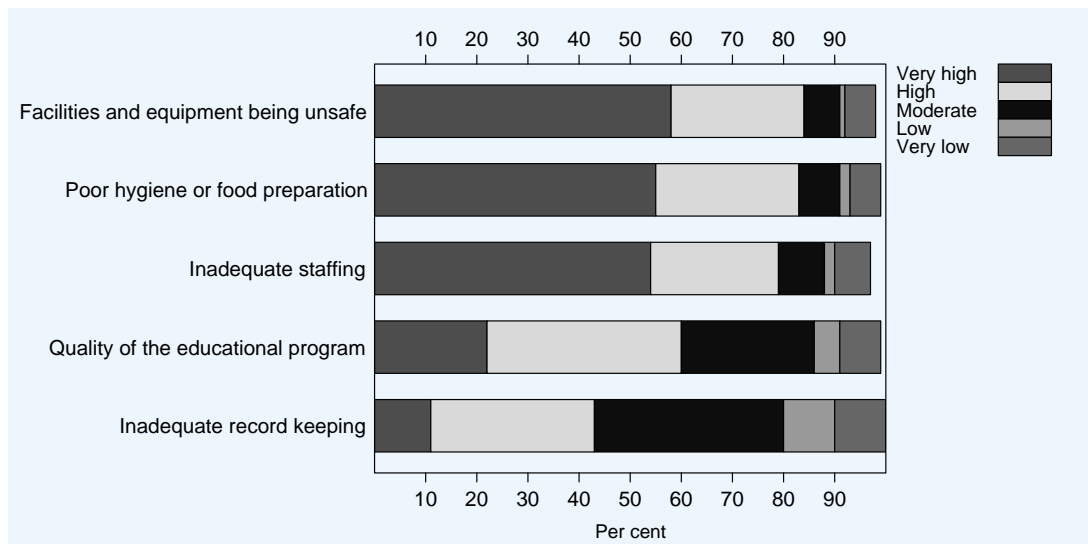
Service providers were informed that the Regulation Review was considering aligning DoCS compliance and enforcement efforts to those breaches which posed the greatest risks to children’s outcomes and that penalties would then reflect the seriousness of these risks. Respondents were then asked about which breaches of the Regulation should attract the highest penalties.

As Figure 3.12 and Table 3.21 show, three types of breaches attracted the most censure: where facilities and equipment were unsafe; where there was poor hygiene or food preparation; and where there was inadequate staffing. For these breaches between 79

and 84 per cent of respondents indicated that penalties should be either ‘very high’ or ‘high’, with the percentage in the ‘very high’ category hovering in the mid-50 per cent range.

On the other hand, where centres breached requirements in terms of the quality of their educational program or their record keeping, the level of censure was lower. In the case of educational program breaches, 60 per cent of respondents thought the penalties should be ‘very high’ or ‘high’ (and only 22 per cent were in the ‘very high’ category). Only 11 per cent of respondents thought inadequate record keeping should attract a ‘very high’ penalty, though another 32 per cent thought it rated a ‘high’ penalty.

Figure 3.12: Severity of penalties which should apply for breaches



Source: DoCS Service Providers’ Internet Survey. See Table 3.21

Table 3.21: Severity of penalties which should apply for breaches (%)

Breaches	Very high	High	Mod-erate	Low	Very low	Don’t know	Total
Facilities and equipment being unsafe	58	26	7	1	6	1	99
Poor hygiene or food preparation	55	28	8	2	6	1	100
Inadequate staffing	54	25	9	2	7	2	99
Quality of the educational program	22	38	26	5	8	2	101
Inadequate record keeping	11	32	37	10	10	1	101

Source: DoCS Service Providers’ Internet Survey. Population: All respondents (n = 1,145).

Turning now to a more detailed look at these responses, Table 3.22 shows that respondents in long day care services regarded breaches of inadequate staffing as less serious than did respondents in other services. Some 26 per cent thought penalties for these should be ‘moderate’, ‘low’ or ‘very low’. By contrast, the comparable figures for other services was about 14 per cent.

When it came to inadequate record keeping, most services had a similar profile, regarding this breach as the least serious of all.

Respondents in home-based services took breaches of poor hygiene or food preparation very seriously, with 81 per cent suggesting that the penalties should be ‘very high’. The average across all services was 55 per cent.

A similar difference was evident with breaches for unsafe facilities and equipment. Some 77 per cent of home-based care respondents wanted penalties to be ‘very high’ for such breaches, compared with an average of 58 per cent across all services.

As for breaches of educational program quality requirements, preschool respondents took this most seriously and long day care were the least concerned. Among the former, 71 per cent thought the penalties should be ‘very high’ or ‘high’, while among the latter, the comparable figure was 52 per cent.

Looking at the category of service provider (Table 3.23), most respondents in private provider services rated all the penalties at a much lower level than did those in community-based not-for-profit services or local council-provided services. This difference was somewhat weaker for the inadequate record keeping breaches and breaches of educational program quality, but quite pronounced in the other three categories. For example, some 92 per cent of respondents in community-based not-for-profit services thought penalties for inadequate staffing should be ‘very high’ or ‘high’. The comparable figure among respondents in private provider services was 63 per cent.

Table 3.22: Severity of penalties which should apply for breaches, by type of service (%)

Breaches	Very high	High	Moderate	Low	Very low	Don't know	Total	n
Inadequate staffing								
Long day care	48	24	10	3	13	2	100	625
Preschools	66	21	6	1	4	1	100	344
Family day care	55	30	10	2	0	2	100	288
Home-based	64	23	9	2	0	2	100	47
Occasional care	64	22	10	2	1	1	100	91
Other	61	25	11	0	2	2	100	57
All respondents	54	25	9	2	7	2	100	1,145
Inadequate recording keeping								
Long day care	10	27	36	10	16	1	100	625
Preschools	12	37	35	10	5	1	100	344
Family day care	11	33	43	10	2	1	100	288
Home-based	13	34	45	6	0	2	100	47
Occasional care	13	34	45	7	1	0	100	91
Other	16	35	33	11	4	2	100	57
All respondents	11	32	37	10	10	1	100	1,145
Poor hygiene or food prep								
Long day care	49	28	8	3	11	1	100	625
Preschools	56	30	10	1	2	1	100	344
Family day care	62	30	6	1	0	1	100	288
Home-based	81	15	2	2	0	0	100	47
Occasional care	65	30	5	0	0	0	100	91
Other	63	23	9	2	2	2	100	57
All respondents	55	28	8	2	6	1	100	1,145
Facilities & equip unsafe								
Long day care	52	25	8	3	11	1	100	625
Preschools	58	30	8	1	2	1	100	344
Family day care	69	25	5	1	0	1	100	288
Home-based	77	19	4	0	0	0	100	47
Occasional care	64	32	4	0	0	0	100	91
Other	63	28	4	2	2	2	100	57
All respondents	58	26	7	1	6	1	100	1,145
Quality of educat program								
Long day care	19	33	26	6	13	2	100	625
Preschools	31	40	22	3	3	1	100	344
Family day care	19	39	34	5	2	1	100	288
Home-based	23	40	34	0	2	0	100	47
Occasional care	26	44	25	3	1	0	100	91
Other	30	39	23	4	4	2	100	57
All respondents	22	38	26	5	8	2	100	1,145

Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145)

Table 3.23: Severity of penalties which should apply for breaches, by category of service (%)

Breaches	Very high	High	Mod- erate	Low	Very low	Don't know	Total	n
Inadequate staffing								
Private provider	37	26	12	4	18	3	100	440
Community-based not-for-profit	68	24	6	1	0	1	100	456
Local council	61	24	10	3	0	2	100	195
Other	56	33	4	2	4	2	101	54
Total	54	25	9	2	7	2	100	1,145
Inadequate recording keeping								
Private provider	8	22	35	11	22	2	100	440
Community-based not-for-profit	12	39	36	9	2	1	99	456
Local council	11	35	41	11	3	0	101	195
Other	11	37	39	7	4	2	100	54
Total	11	32	37	10	10	1	100	1,145
Poor hygiene or food prep								
Private provider	45	26	8	4	15	2	100	440
Community-based not-for-profit	62	28	9	0	0	1	100	456
Local council	61	31	7	1	0	0	100	195
Other	63	33	0	0	4	0	100	54
Total	55	28	8	2	6	1	100	1,145
Facilities & equip unsafe								
Private provider	47	24	10	3	15	2	101	440
Community-based not-for-profit	65	28	6	0	0	1	100	456
Local council	67	26	6	1	0	0	100	195
Other	72	22	2	0	4	0	100	54
Total	58	26	7	1	6	1	100	1,145
Quality of educat program								
Private provider	14	32	25	8	18	3	100	440
Community-based not-for-profit	27	44	23	3	2	1	100	456
Local council	22	37	35	5	1	0	100	195
Other	31	33	28	0	7	0	99	54
Total	22	38	26	5	8	2	100	1,145

Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145)

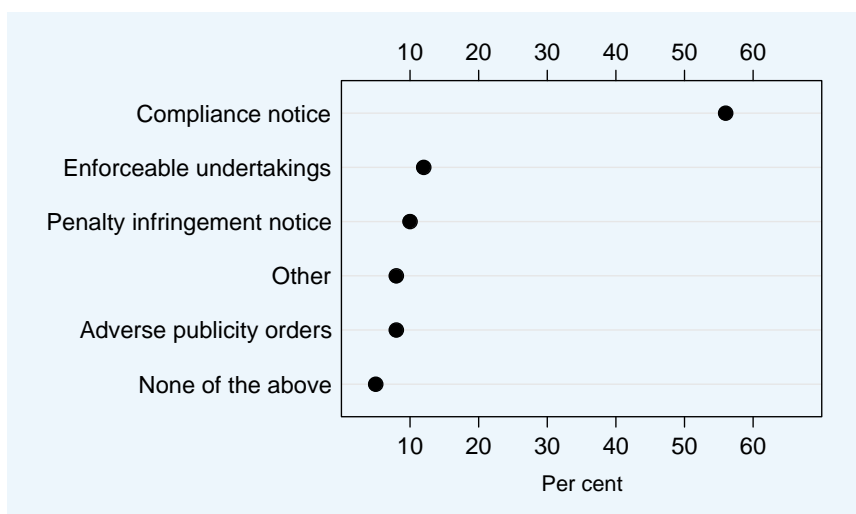
3.7.2 Enforcement tools

Respondents were also asked which enforcement tools were most effective in encouraging non-compliant services to comply more quickly with the requirements of the Regulation. Five options were listed, but only one option was endorsed by a majority of respondents. Some 56 per cent indicated that they believed issuing

compliance notices was most effective. The next most popular—a long way behind—was issuing enforceable undertakings (12 per cent), followed by penalty infringement notices (10 per cent).

There were no discernible differences on this issue between different service types or different service categories (results not shown).

Figure 3.13: Which enforcement tools most effective



Source: DoCS Service Providers’ Internet Survey. See Table 3.24

Table 3.24: Which enforcement tools most effective (%)

Options	Number	Per cent
Compliance notice	645	56
Enforceable undertakings	143	12
Penalty infringement notice	115	10
Other	96	8
Adverse publicity orders	91	8
None of the above	55	5
Total	1,145	99

Notes: Definitions: **Compliance Notice**—sets out what action is required to fix the problem and the timeframe by which it must be done; **Penalty Infringement Notice**—imposes a fine for specific breaches of the Regulation. The matter is finalised once the fine is paid and the problem fixed; **Enforceable Undertakings**—a written commitment to carry out remedial measures to avoid prosecution. It is enforceable in court; **Adverse Publicity Orders**—a court order that would require a licensee to make known to the public specified information about an offence for which they have been found guilty.

Source: DoCS Service Providers’ Internet Survey.

Population: All respondents (n = 1,145).

◇ 3.8 Licensing model

The views of service providers on options for changing the licensing model were sought. The survey noted that the concept of a master licence was being considered. Such a licence would replace the current model where each licence is granted for a particular service. A master licence, by contrast, would cover all the services that a licensee operated.

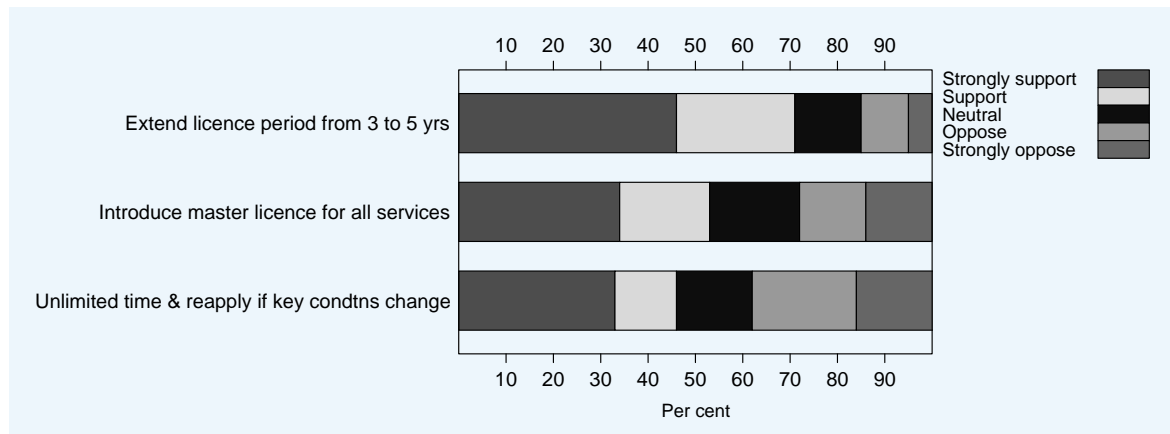
The survey then asked whether respondents supported such a model, as well as two other options: extending the licence period from 3 to 5 years and granting a licence for an unlimited time period, and then requiring re-application only if key conditions changed.

The greatest level of support was for extending the licence period from 3 to 5 years. Some 46 per cent of respondents ‘strongly supported’ this and another 25 per cent ‘supported’ it, a total of 71 per cent. There was very little opposition (15 per cent).

The master licence also had majority support (53 per cent), though only 34 per cent ‘strongly supported’ it. The level of opposition was notable (28 per cent). (See Table 3.25).

Finally, providing unlimited time period licences garnered 46 per cent support in total, with 33 per cent expressing ‘strong support’. The level of opposition was considerable (39 per cent).

Figure 3.14: Preferences for licensing model



Source: DoCS Service Providers’ Internet Survey. See Table 3.25

Table 3.25: Preferences for licensing model (%)

Options	Strongly support	Support	Neutral	Oppose	Strongly oppose	Total
Extend licence period from 3 to 5 yrs	46	25	14	10	5	100
Introduce master licence for all services	34	19	19	14	14	100
Unlimited time & reapply if key condtns change	33	13	16	22	17	101

Source: DoCS Service Providers’ Internet Survey. Population: All respondents (n = 1,145).

Table 3.26: Preferences for licensing model, by type of service (%)

Options	Strongly support	Support	Neutral	Oppose	Strongly oppose	Total	n
Master licence							
Long day care	41	17	17	12	12	100	625
Preschools	28	18	20	18	16	100	344
Family day care	27	22	23	11	17	100	288
Home-based	30	17	13	17	23	100	47
Occasional care	33	30	13	11	13	100	91
Other	37	26	7	12	18	100	57
All respondents	34	19	19	14	14	100	1,145
Extending licence							
Long day care	51	21	13	9	6	100	625
Preschools	46	26	11	11	6	100	344
Family day care	29	32	19	13	7	100	288
Home-based	34	28	13	9	17	100	47
Occasional care	34	32	14	11	9	100	91
Other	39	18	18	18	9	100	57
All respondents	46	25	14	10	5	100	1,145
Unlimited time period & re-apply†							
Long day care	44	13	11	18	14	100	625
Preschools	28	13	12	26	20	100	344
Family day care	14	12	28	25	21	100	288
Home-based	21	9	15	23	32	100	47
Occasional care	14	13	16	31	25	100	91
Other	19	12	18	26	25	100	57
All respondents	33	13	16	22	17	100	1,145

Notes: † 'Granting a licence for an unlimited time period, and re-application only necessary if key conditions change'.

Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145)

Among long day care service providers the master licence was well supported. Some 58 per cent of respondents expressed support, with 41 per cent 'strongly supportive'. Some 24 per cent of these types of respondents opposed this model. (See Table 3.26).

By way of comparison, other respondents were more evenly divided on this model. While 47 per cent of home-based carers supported it, some 40 per cent opposed it. Similarly, among respondents in preschools, some 46 per cent supported it, but 34 per cent opposed it.

A similar, but somewhat weaker, pattern was evident in the model of extending the licence period. Long day care services expressed high levels of

support (72 per cent), with those 'strongly supportive' accounting for 51 per cent. Only 15 per cent expressed opposition.

By contrast, respondents in home-based care were less supportive (62 per cent in total) and more critical (26 per cent in opposition).

The final option, of offering an unlimited time period licence, met with much stronger opposition across most service types. Indeed, the level of opposition was considerably greater than the level of support (with the exception of long day care). For example, opposition was in the majority among home-based carers and respondents in occasional care (55 and 56 per cent), and figured prominently among respondents in

preschools and family day care (46 per cent). Among respondents in long day care, on the other hand, the level of opposition was 32 per cent, considerably behind the others.

Turning to category of service provider, Table 3.27 shows that among private providers the master licence model met with considerable support. Some 58 per cent supported it, and only 26 per cent opposed it. By contrast, respondents in community-based not-for-profit services were more evenly divided: some 44 per cent supported it, and 33 per cent opposed it.

The model of extending the licence period met with greater levels of support

across all categories. Not only did private providers support it strongly (79 per cent), but it met it greater approval among community-based not-for-profit services (70 per cent) and local council-provided services (57 per cent).

The sharpest differences were evident for the unlimited time period model. Among private providers the support was considerable (67 per cent) whereas among community-based not-for-profit services opposition outweighed support (49 per cent opposing and 35 per cent in support.) Similarly, respondents in local council-provided services were much more against the model (51 per cent) than in favour (25 per cent).

Table 3.27: Preferences for licensing model, by category of service (%)

Options	Strongly support	Support	Neutral	Oppose	Strongly oppose	Total	n
Master licence to cover all services							
Private provider	42	16	16	13	13	100	440
Community-based not-for-profit	24	20	23	16	17	100	456
Local council	35	22	17	13	13	100	195
Other	37	19	22	6	17	101	54
Total	34	19	19	14	14	100	1,145
Extending licence period 3 to 5 yrs							
Private provider	59	20	11	5	5	100	440
Community-based not-for-profit	41	29	13	12	5	100	456
Local council	30	27	21	18	4	100	195
Other	30	26	22	11	11	100	54
Total	46	25	14	10	5	100	1,145
Unlimited time period & re-apply†							
Private provider	54	13	11	12	10	100	440
Community-based not-for-profit	24	11	16	29	20	100	456
Local council	9	16	25	27	24	101	195
Other	20	9	19	30	22	100	54
Total	33	13	16	22	17	100	1,145


Notes: † 'Granting a licence for an unlimited time period, and re-application only necessary if key conditions change'.

Source: DoCS Service Providers' Internet Survey. Population: All respondents (n = 1,145)

Appendix A

Survey questionnaires

A.1 Internet survey form for parents







Welcome to the Parents' Survey


This survey is being conducted on behalf of the New South Wales Department of Community Services by independent researchers at RPR Consulting.

The aim of the survey is to help parents and carers contribute their ideas to the review of the Children's Services Regulation 2004.

How to fill in the survey

Filling in this survey should take less than 10 minutes. There are a total of 16 questions, most of them involve clicking buttons like this  or this  and two involve typing in your views. The boxes you type into don't limit how much you can say. Just keep typing and you will find you can move down in the box.

At the bottom of each question you will see an arrow like this . Clicking it will take you on to the next question. You may get a message saying you haven't completed the question. This might happen if you haven't clicked the  buttons properly.

You will also see an arrow like this  which will allow you to return to earlier questions if you want to change anything.

If you have any TECHNICAL problems with the internet side of this survey, please phone 02 9555 2899.

Login now

Please enter a login code below. This helps us to keep track of duplicates. It **does not** identify you in any way. (It just combines some of the letters from your name and birthdate, e.g. Mary Jones born in 1980 has the login: ryjo80).

Enter the last two letters in your first name:

Enter the first two letters in your last name:

Enter the last two numbers in your year of birth:

The information you supply will be treated confidentially. It is not possible for information supplied to be linked with individuals or organisations. The report based on this survey will not present findings in a way which identifies individuals or organisations.

Your current child care

We are interested in your views about the **quality** of the child care your children currently receive from children's services.

Q1 How would you rate the quality of any of the following types of children's services which you use. If you don't use that type of service, please select NA.

	Very high	High	Neutral	Poor	Very poor	NA
Long day care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preschool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobile service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family day care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home-based care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School-based preschool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Occasional care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Your main priorities

Parents decisions about child care will be influenced by a number of factors including availability, convenience and cost. Quality is also an important consideration. In regards to quality, how important are the following issues for you when it comes to the quality of child care?

Q2 Please rate the importance of each of the following:

	Very important	Important	Neutral	Not important	Not important at all
Caring staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The formal qualifications of the staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The number of staff that care for each child	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The size of the group in which children are cared for	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The experience of staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The physical environment and equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Staff qualifications

Early childhood research shows that staff qualifications make a positive difference to the quality of child care. Options for the new Regulation include improving staff qualifications.

Q3 How important do you think each of the following options is, when it

comes to benefiting children?

	Very important	Important	Neutral	Not important	Not important at all
Introducing a minimum qualification for staff and carers across all types of children's services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing the proportion of staff who have higher level qualifications (eg. TAFE or similar) in child care centres and preschools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing the number of staff who have child protection and first aid qualifications in all types of children's services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Requiring more child care centres and preschools to employ a university-trained early childhood teacher than are currently required to do so	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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If changes were to occur which required minimum qualifications, or upgraded qualifications for staff and carers, consideration would be given to phasing in this requirement over time so that existing staff and carers have an opportunity to gain qualifications and/or have their prior experience recognised.

Q4 With this in mind, which children's services do you think this requirement for minimum qualifications should apply to?

Tick ALL that apply

- Long day care staff
- Preschool staff
- Staff in mobile services
- Family day carers
- Home-based carers
- School-based preschool staff
- Occasional care staff
- None - I don't think such a requirement should be introduced

 [Continue](#) 

What DoCS should do ... your views

Q5 DoCS is responsible for setting the minimum standards for child care. What do you think it is most important for DoCS to focus on?



Staff to child ratios

The NSW Government has decided that there should be a ratio of 1 staff member for every 4 children (under 2 years old) for centred-based and mobile services as part of the new Regulation.

Q6 With this in mind, what do you think would be the best way to introduce the new ratio?

- Simply replace the current 1 to 5 ratio with the new 1 to 4 ratio
- Apply the 1 to 4 ratio, and ease restrictions on use of space for affected services
- Phase it in by applying it first to centres with more children under 2 before centres with fewer children under 2
- Apply it to the youngest children only (those under 18 months)
- Apply it only during certain parts of the day, such as core hours like 9am to 5pm
- I don't know
- Other (please specify)

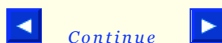


Family day care and home-based care

At present, a family day carer or home-based carer can look after up to five under 2 year olds at any one time. The Regulation Review is considering whether this number should be reduced.

Q7 With this in mind, which of the following do you prefer?

- Reducing the limit on the number of under 2 year olds to either two or three children
- Allowing a family day or home-based carer to care for four children under two years, but no other children at the same time
- Keep as it is
- I don't know (or it doesn't apply to me)



Group sizes

Currently the Regulation requires that children should be cared for in groups no larger than 10 for children aged under 2. For those aged 2 to under 3, the group size requirement is 16, and for those aged 3 to under 6, it is 20. We are only talking about centred-based and mobile services here.

One option being considered is to keep the current requirement for under 2 year olds and 2 to under 3 year olds, but give centres some flexibility in the size of groups for children aged 3 to under 6 years.

Q8 If the group size requirements for those aged 3 and over was removed, would this concern you?



- I would be very concerned
- I would be slightly concerned
- I would not be concerned
- I'm not sure how I would feel

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Importance of excursions

Q9 How important for you is it that your children can go on the following kinds of excursions while in child care? (Please select NA if it is not applicable to you.)

	Very important	Important	Neutral	Not important	Not important at all	NA
Going to a playgroup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Going to local parks, schools and shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Going on longer excursions, such as museums	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Going near water	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Providing information

Q10 Do you agree or disagree with the following statements. "I think parents should have more information made available to them about ..."

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
the results of DoCS' routine inspections of the service my child attends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
formal investigations by DoCS of the service my child attends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
serious accidents and injuries to children that occur at the service my child attends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
general levels of compliance across children's services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the number and type of proven complaints about a service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Increased costs

Whatever options are finally introduced, increasing the quality of child care may cost parents more.

Q11 With this in mind, how much more are you willing to pay (per child) for improvements in quality?

- \$1 to \$5 per day
- \$6 to \$10 per day
- \$10 to \$15 per day
- I am not willing to pay any more

 [Continue](#) 

Your own use of child care

Q12 Which of the following types of children's services do you currently use?:

Tick ALL that apply

- Long day care
- Preschools
- Mobile services
- Family day care
- Home-based services
- School-based preschools
- Occasional care

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Your children

Q13 How many children do you have attending children's services in each of the following age groups:

Under 2 year olds:

2 to under 3 year olds:

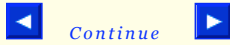
3 to under 6 year olds:

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Family income

Q14 When it comes to your gross family income, which of the following categories do you fit into:

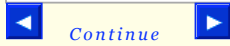
- Under \$50,000 per year
- \$50,000 to under \$90,000 per year
- \$90,000 to under \$125,000 per year
- \$125,000 or higher per year
- I don't know



The future ...

Q15 If various changes go ahead which increase the cost of child care and you find it difficult to manage financially, what are you most likely to do?

- Make other child care arrangements (eg. family or friends)
- Reduce your hours of paid work
- Stop working in a paid job
- Make household savings by cutting back other expenses
- Other (please specify)



Finally ...

Q16 Do you have any other comments or suggestions?

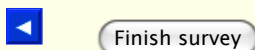


Thank you

If you are ready to submit your answers, please click "Finish survey".

You cannot return to this form once you have finished.

If you wish to review any of your answers, click on the arrow.



◇ A.2 Internet survey form for service providers




Welcome to the Service Providers' Survey


This survey is being conducted on behalf of the New South Wales Department of Community Services by independent researchers at RPR Consulting.

The aim of the survey is to help service providers, staff and others contribute their ideas to the review of the Children's Services Regulation 2004.

How to fill in the survey

Filling in this survey should take less than 10 minutes. There are a total of 16 questions, most of them involve clicking buttons like this or this and two involve typing in your views. The boxes you type into don't limit how much you can say. Just keep typing and you will find you can move down in the box.

At the bottom of each question you will see an arrow like this . Clicking it will take you on to the next question. You may get a message saying you haven't completed the question. This might happen if you haven't clicked the buttons properly.

You will also see an arrow like this  which will allow you to return to earlier questions if you want to change anything.

If you have any TECHNICAL problems with the internet side of this survey, please phone 02 9555 2899.

Login now

Please enter your email address to login to the survey. We are asking for this only because we wish to avoid double-counting. Your email address will NOT be linked with this survey form. Even the researchers cannot link email addresses with the answers.

Email address:

Begin survey now

The information you supply will be treated confidentially. It is not possible for information supplied to be linked with individuals or organisations. The report based on this survey will not present findings in a way which identifies individuals or organisations.

What should be regulated

Q1 Not all children's services are currently regulated by the NSW Government. Do you think any of the following types of services should be regulated:

	Yes	No	Don't know
If the parents remain on the premises	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If a parent is not on the premises of the service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the care is provided in the parent's home by someone other than a parent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If care is provided in a community venue not usually used for child care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If care is provided by a school for a short period as orientation to the first year of school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Continue 

Staff to child ratios

The NSW Government has decided that there should be a ratio of 1 staff member for every 4 children (under 2 years old) for centred-based and mobile services as part of the new Regulation.

Q2 With this in mind, what do you think would be the best way to introduce the new ratio?

- Simply replace the current 1 to 5 ratio with the new 1 to 4 ratio
- Apply the 1 to 4 ratio, and ease restrictions on use of space for affected services
- Phase it in by applying it first to centres with more children under 2 before centres with fewer children under 2
- Apply it to the youngest children only (those under 18 months)
- Apply it only during certain parts of the day, such as core hours like 9am to 5pm
- I don't know
- Other (please specify)

 Continue 



Group size proposed changes

Currently the Regulation requires that children should be supervised in groups no larger than 10 for children aged under 2. For those aged 2 to under 3, the group size requirement is 16, and for those aged 3 to under 6, it is 20. We are only talking about centred-based and mobile services here.

One option being considered is to keep the current requirement for under 2 year olds and 2 to under 3 year olds, but give centres some flexibility in the size of groups for children aged 3 to under 6 years.

Q3 In regards to group size requirements, how important do you consider group size requirements to be for the following age groups:

	Very important	Important	Neutral	Not important	Not important at all
Under 2 year olds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2 to under 3 year olds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3 to under 6 year olds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

 [Continue](#) 

Group size proposed changes

Q4 What is your view about the option to remove the group size requirement for 3 to under 6 year olds?

- I strongly support it
- I support it
- I'm not sure
- I oppose it
- I strongly oppose it

 [Continue](#) 

Maximum numbers flexibility

Services are licensed for a total number of places and then for a maximum number of children in different age groups.

Q5 If you are involved in providing a centre-based or mobile children's service, how likely is it that you would make use of having the flexibility to increase the number of children in the 2 to under 6 age group while still keeping within the total numbers of children?


- Very likely
- Somewhat likely
- Neutral
- Not likely
- Not likely at all
- Don't know (or doesn't apply to me)

 [Continue](#) 

Excursions of children

Q6 How often do you take children in your care on the following kinds of excursions?

	Frequently	Occasionally	Rarely	Never	NA
Going to a playgroup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Going to local parks, schools and shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Going on longer excursions, such as museums	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Going near water	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

 [Continue](#) 

Risk assessment and excursions

Q7 If a decision is made to change the operational requirements for conducting excursions to make them safer, which of the following measures do you most support:

- Requiring services to undertake a risk assessment prior to an excursion
- Higher staff to child ratios
- Other (please specify)

 *Continue* 


Staff qualifications

Early childhood research shows that staff qualifications make a positive difference to the quality of child care. Options for the new Regulation include improving staff qualifications.

Q8 Which three of the following options to improve the qualification levels of staff do you think would have the most benefit for children?

Tick upto THREE options

- Introducing a **minimum qualification** requirement for staff across all types of children's services (eg. TAFE Certificate III)
- Increasing the number of staff with **higher level VET qualifications** in child care centres (eg. TAFE Certificate IV)
- Increasing the number of staff who have child protection and first aid qualifications
- Requiring child care centres, with more than 20 children, to employ a university-trained early childhood teacher
- No change to the current requirements
- I don't know
- Other (please specify)

 *Continue* 

If changes were to occur which required minimum qualifications, or upgraded qualifications for staff and carers, consideration would be given to phasing in this requirement over time so that existing staff and carers have an opportunity to gain qualifications and/or have their prior experience recognised.

Q9 With this in mind, who do you think this requirement for minimum qualifications should apply to?

- Only staff in centre-based services and in mobile services
- All staff in all types of children's services
- I don't think such a requirement should be introduced

 *Continue* 

Removing restrictions ... your views

Q10 If there were one area where you could remove restrictions which are imposed by the current Regulation, what would it be? Please give a concrete example in your comments.

 [Continue](#) 

Compliance and enforcement

The Regulation Review is considering aligning DoCS **compliance** and **enforcement** efforts to those breaches which pose the greatest risks to children's outcomes. Penalties would then reflect the seriousness of these risks.

Q11 In your view, which breaches of the Regulation should attract the highest penalties? Please indicate the severity of penalties which should apply to the following?

	Very high	High	Moderate	Low	Very low	Don't know
Inadequate staffing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inadequate record keeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Poor hygiene or food preparation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilities and equipment being unsafe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of the educational program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

 [Continue](#) 

Enforcement tools

To encourage higher levels of compliance, the Regulation Review is considering increasing its **enforcement tools** under the Regulation.

Q12 Which of the following do you think would be most likely to encourage non-compliant services to comply more quickly with the requirements of the Regulation?

- Compliance Notice** (sets out what action is required to fix the problem and the timeframe by which it must be done)
- Penalty Infringement Notice** (imposes a fine for specific breaches of the Regulation. The matter is finalised once the fine is paid and the problem fixed.)
- Enforceable Undertakings** (a written commitment to carry out remedial measures to avoid prosecution. It is enforceable in court.)
- Adverse Publicity Orders** (a court order that would require a licensee to make known to the public specified information about an offence for which they have been found guilty).
- None of the above
- Other (please specify)

◀ Continue ▶

Licensing model

One option under consideration is for a **master** licence to be introduced. This would replace the current model where each licence is for a particular service. A master licence would cover all the services that a licensee operates.

Q13 Do you support or oppose the following licensing models?

	Strongly support	Support	Neutral	Oppose	Strongly oppose
Introducing a master licence to cover all services held by a licensee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Extending the licence period from 3 to 5 years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Granting a licence for an unlimited time period, and re-application only necessary if key conditions change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

◀ Continue ▶

Your own service

Q14 Please tell us something about yourself. Which of the following applies to you?

Tick ALL that apply

- Licensee of a centre based or mobile service
- Licensee of a family day care scheme
- Authorised Supervisor of a centre based or mobile service
- Authorised Supervisor of family day care scheme
- Staff of a centre based or mobile service
- Family day carer
- Home-based carer
- Other (please specify)

◀ Continue ▶

Type of service

Q15 Which of the following types of children's services does your service/services belong mostly within?:

Tick ALL that apply

- Long day care
- Preschools
- Mobile services
- Family day care
- Home-based care
- School-based preschools


Occasional care

 *Continue* 

Service category

Q16 Which of the following categories does your service belong in?

- Private provider
- Community-based not-for-profit
- Local council
- Don't know
- Other (please specify)

 *Continue* 

Organisational size

Q17 Are you a licensee of:



- 1 service
- 2 to 5 services
- 6 or more services
- I'm not a licensee (or I don't know)

 *Continue* 

Geographical location

Q18 Where is your service located?



- Sydney: inner suburbs
- Sydney: outer suburbs
- Newcastle, Central Coast or Wollongong
- Large regional city or town
- Small regional or rural town or location
- Spread over more than one of the above areas

 *Continue* 

Finally ...

Q19 Do you have any other comments or suggestions?



 *Continue* 

Now to submit your answers ...

If you are ready to submit your answers, please click "Finish survey".

You cannot return to this form once you have finished.

If you wish to review any of your answers, click on the arrow.

