

National Day Nurseries Association

Early Years Workforce Survey England 2016



INTRODUCTION

This fourth NDNA Annual Workforce Survey is published at a crucial time for the early years sector in England. NDNA will give to Government these findings on the challenges experienced by those providing the foundations for care, learning and development that very young children need to become successful adults.

The new Government Under Secretary of State for Early Years is currently working on a workforce strategy for early years, looking at ways of getting and keeping the best individuals in the sector. This includes recognising that excellence can be measured by qualities other than exam results; helping to develop people's talents while they are working in the sector; keeping the most able and experienced staff and ensuring that those who work in the profession feel valued and appreciated¹.

This year, NDNA's Workforce Survey includes the views of **practitioners as well as employers** to inform the Government's intended workforce strategy. The survey represents the views of 278 nursery owners and managers in England, employing around 12,500 practitioners caring for over 58,000 children, and a further 385 individual practitioners who responded in their own right.

The survey shows employers are committed to providing excellent childcare, but are facing increasing difficulties in recruiting and retaining practitioners, especially those qualified at level 3. Employers are concerned about the impact of changes to qualification levels for those undertaking sector training, changes to apprenticeships, the National Living Wage and the impact of the introduction of 30 hours funded childcare on their ability to recruit, develop and retain a high quality workforce.

Workforce turnover, now at 18% (up four percentage points from 2015), combined with a lack of suitable applicants for posts at level 3 and below means that maintaining sufficient staff is increasingly difficult. There is a serious risk that lack of staff may affect the numbers of places available for extended free childcare. Furthermore, level 2 is not fit for purpose and the sector aspires to level 3 as it provides an in-depth understanding of childcare.

Workforce turnover

14%
IN 2015



18%
IN 2016



"The training received at level 2 does not provide enough work experience and skill to be working in a room without direct mentoring and support which distracts from supporting children."

¹ Interview in Nursery World, 19 September 2016: www.nurseryworld.co.uk/nursery-world/opinion/1158946/caroline-dinenage-i-am-ready-to-roll-up-my-sleeves

While larger providers are more able to support staff progression through 'growing their own' staff, other providers are finding that there are no or very few applicants, particularly for level 3 posts. Where applicants do come forward, their quality and calibre is also a concern.

Practitioners at all levels continue to leave the workforce because of higher pay outside the sector, particularly at level 2 and 3 because routes to progression are barred if they do not hold the necessary GCSEs to improve their early years qualifications. **There are not enough routes to help employers support practitioners to gain GCSEs and a lack of appetite for existing practitioners to do so.**

Many employers are worried about rising costs including using agency staff to fill vacancies, paying the National Living Wage and pensions. These affect some employers' ability to provide high-quality continuing professional development to staff. The results of these recruitment challenges and the increased need to use agencies to meet statutory requirements and ratios, will impact on costs and availability of childcare. This combination of changes presents a serious threat to businesses and parents, with a risk that nurseries will be forced both to turn children away and push up the cost of childcare.

Access to sufficient high-quality affordable training is also a concern to both employers and practitioners. Providers are increasingly using online and in-house training as more cost effective options. There is a particular lack of training to support help for children with special educational needs and disabilities (SEND), a key Government priority.

There was a mixed response as to whether the Department for Education's forthcoming workforce strategy should give guidance on continuing professional development (CPD) and progression routes. As in previous years, many early years providers continue to hold negative views about perceived Government interference. Current Government funding rates fall short of delivery costs for many nurseries, ultimately threatening sustainability. The sector feels over-regulated and under-valued.

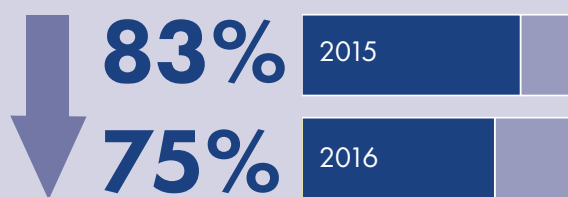
"I need to complete my English and science aged 40. I have a full early years degree but am unable to do higher training due to GCSEs. It's terrible! I would question, does not having GCSEs when we have been excellent practitioners for many years make a difference?"

"Already at crisis point with regards to workload and low pay rates. The Government's intention to raise standards in the early years sector is not supported by a raise in wages."

KEY MESSAGES

- For the first time since the NDNA Annual Workforce Survey started in 2013 there has been a downward trend in the workforce's qualification levels (a drop to 75% in the number of staff qualified at level 3 or above from 83% in 2015 - this does not include managers). The survey results show a concerning picture for employers to deliver the funded childcare promise and for practitioners who are leaving because of their inability to improve their pay and prospects due to the lack of progression opportunities
- The numbers of staff leaving the workforce has increased with turnover now at 18% (the number of level 3 qualified staff leaving is the highest at 21% with 19% at level 2, 18% unqualified staff and 12% for those qualified to higher than level 3; 68% of respondents lost staff qualified to level 3)
- The main reasons for leaving the sector were higher salaries and lack of progression within the sector. The majority of comments suggested the lack of progression was due to the GCSE qualification requirements. (For level 3 qualified staff 60% left for higher salaries and 59% because of lack of progression within the sector. For level 2 staff 63% left for higher pay and 30% because of lack of progression)
- Over half the respondents found recruiting staff qualified to level 3 problematic: there are too few staff with this level of qualification and the knowledge and skills of some applicants are very poor (58% of respondents found recruiting level 3 staff difficult or very difficult)
- Current staff qualified at level 2 and level 3 cannot match the requirements for GCSE Grade C and above in maths and English so they become undervalued in the workforce or cannot progress. (46% of the workforce qualified to level 3 and 31% of those qualified at level 2 hold GCSEs in these subjects at grades A* - C)
- The majority of employers responded that a change to GCSE requirements for level 3 training (such as Functional Skills at level 2) would have a positive impact on their business (59%, with 17% thinking it would have a negative impact and 24% unsure about the impact)
- Accessing training in SEND is found difficult by employers and practitioners. This is particularly worrying as employers indicated that staff at grade 3 and below lacked

Workforce qualification levels



Reasons for leaving the sector



GCSE requirements



understanding of the Education, Health and Care (EHC) process. Only 55% of employers have access to sufficient training in SEND with employers stating they had little or no confidence in their level 2 staff's understanding of the EHC process and 22% in their level 3 staff

- Employers use a range of methods to source and provide training, with local authorities and online training the most popular sources (87% of respondents used local authorities to source and access training, 86% used online training)
- Although almost all nurseries have training budgets, about a third of employers will have less to spend on training in the coming year. The National Living Wage, pensions and worries about funding for 30 hours childcare are cited as reasons for cutting training. (31% indicated the budget would be reduced and gave a variety of reasons for this).

RECOMMENDATIONS

Our top priority is to see a viable long-term strategy for recruiting, retaining and developing the early years workforce.

NDNA's recommendations to Government are:

Government must work with the sector to develop a workforce strategy that is fit for purpose and works in practice for the entire early years workforce



The Government's workforce strategy must:

Be clearly costed and account for funding shortfalls for the delivery of 30 hours and the National Living Wage increases



Include financial investment from Government to address workforce improvement and CPD with a particular focus on supporting children with SEND



Change the requirements for grade A* - C in maths and English GCSEs to accept revised functional skills, whilst maintaining a continuing focus on improving quality



Consider affordability of CPD for the sector to prevent a negative impact in driving up costs of childcare for parents



Give long-term commitment for the development of the early years workforce with clear progression pathways that predict the skills gaps for the next five to ten years



Have a strong focus on attracting new candidates to the workforce as well as retaining those already employed



Focus on a vision of level 3 staff delivering quality early education and a graduate leading practice in every setting



Government must ensure the school system is challenged and supported to improve the number of pupils exiting with both English and maths at grade C or above.

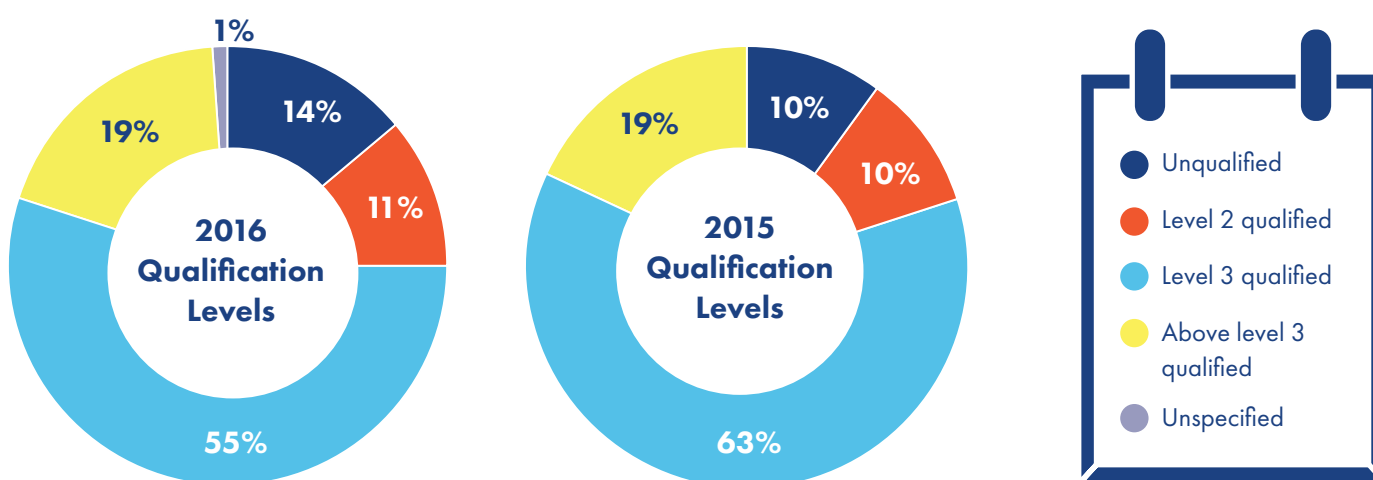


SURVEY FINDINGS

The early years workforce

The composition of the early years workforce is showing a worrying downward trend in relation to qualifications, training and employment. Previous NDNA workforce surveys have shown a year-on-year improvement in qualification levels, with a great deal of alignment with the findings of the Department for Education's (DfE) Childcare and Early Years Providers Survey 2013².

The DfE survey found 87% of paid staff in full day care in 2013 were qualified to at least level 3. The NDNA Workforce Survey 2015 reported that 83% of staff were qualified at level 3 or above. This year the percentage has dropped to 75%. The following charts show the differences in qualification levels.



Staff qualifications

The number of staff employed with no qualifications has increased from 10% to 14% from 2015 and the number of those employing staff with no qualifications is around 61% of respondents. There has also been a small rise in the number of staff qualified to level 2 from 10% to 11% of the total staff surveyed, with 64% of providers employing staff qualified to this level.

Almost all providers (96%) continue to employ level 3 qualified practitioners. These continue to form the highest proportion of staff employed in nurseries with 55% of the workforce qualified to this level. However, the percentage of staff with this level of qualification has dropped from 63% in 2015. Set against the increase in unqualified and level 2 qualified staff, this is a worrying trend.

Around 19% of staff are qualified at above level 3, a very similar proportion to 2015 although the employment pattern has changed significantly, especially in relation to employing graduates or those with early years teacher or early years professional qualifications.

The percentage of staff with level 4 and level 5 qualifications is about 11%, with 50% of employers having at least one staff member at level 4 and 42% having at least one person at level 5.

Those with graduate-level qualifications lead practice across all age ranges from birth to five as well as a proportion not working directly with children. There was an increase in the number of graduates employed against those with EYT/EYP Status from previous years although this may be because a different cohort of employers responded.

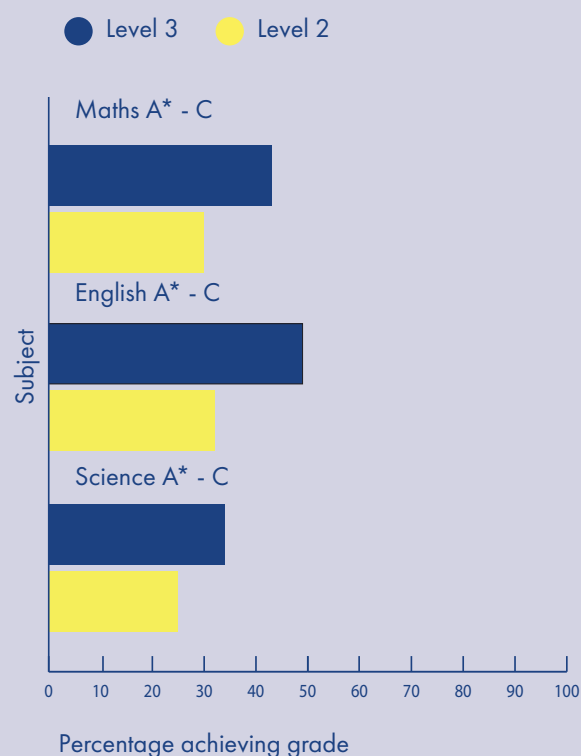
GCSE maths and English

The survey looked at current practitioner qualification levels in GCSE maths, English and science as part of the Government's drive to improve the qualifications of the sector. This shows how many current practitioners would not be able to enter the market now, or are barred from improving their early years qualifications. The findings are slightly down on the previous year for staff qualified at level 3 and are significantly worse for staff at level 2.

Many current staff qualified at level 2 and level 3 cannot match the requirements for GCSE grade C and above in maths and English. Only 46% of the workforce qualified to level 3 and 31% of those qualified at level 2 hold GCSEs in these subjects at grades A* - C. For level 2 staff this has reduced from 48% in 2015.

In 2016, GCSE grades in science were included. Those holding science at any grade are only 34% for those staff qualified to level 3 and 25% for those qualified to level 2. This bars progression to the Early Years Teacher qualification.

Percentage of current practitioners at level 2 and level 3 with GCSEs in maths, English and science



Staff leaving the sector

Turnover of staff was around 18% in the 12 months up to the survey. This is a significant increase on last year's findings of **14% and from the DfE's Childcare and Early Years Providers Survey 2013³** which reported 12% turnover for full daycare. This represents a considerable change for the sector and coupled with the reduction in staff qualifications adds to a difficult picture of the early years workforce.

This year a higher percentage of staff with level 3 qualifications left than any other group with **21% of level 3** staff leaving against **19% of level 2** and **18% of unqualified staff**. Turnover of staff qualified to higher than level 3 was relatively low in comparison at 12%. **More respondents (68%) lost staff at level 3** than any other category, not surprisingly as more settings have level 3 staff than any other grade.

Higher salaries was the main reason given for staff leaving. For level 3 qualified staff these were both in and out of the sector with around 60% of leavers citing salaries and 59% because of lack of progression within the sector. For level 2 staff the main reasons were also higher salaries (63%) and 30% because of lack of progression within the sector. GCSE qualification requirements were cited in the comments as the main reason.

A small proportion left because of poor conduct or relationships and as in previous years very few staff (4%) were made redundant. Other reasons given as to why staff left were family issues, usually because of pregnancy or young children indicating that the hours worked were not conducive to home life.

Recruitment and retention challenges

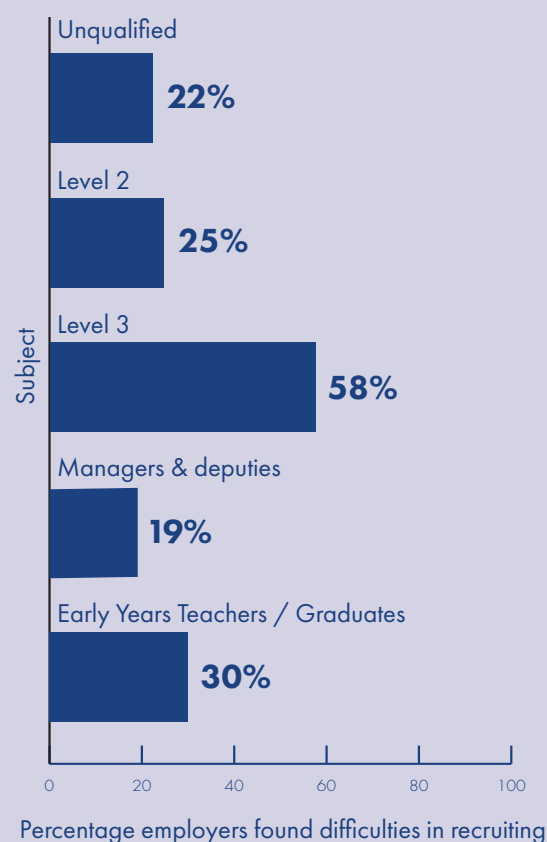
When asked about recruitment and staff retention, employers indicated fewer problems at some levels but this was outweighed by a significant increase in difficulties in recruiting staff with level 3 qualifications.

The lack of suitable candidates with maths and English GCSE at A* - C was by far the main reason given for problems in recruiting unqualified staff and staff at level 2 by over half the respondents. This is also having an impact on recruitment at level 3 as there are insufficient numbers of staff available across the country. This does not appear linked to any region or to an urban or rural location.

Even where there are applicants for posts, the poor calibre of applicants including the quality of training they receive was also a recurrent theme for level 2 and level 3 qualified staff.

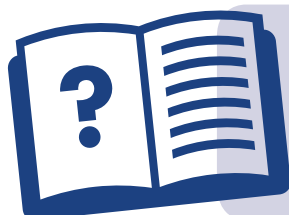
Pay was also an issue in recruiting and retaining staff at all levels but in particular higher qualified staff. For managers and deputies, pay was a factor especially alongside pay offered by schools. However, the main reason given was lack of suitable knowledge and leadership experience linked to the training candidates had received.

When asked about whether the ability to recruit and retain staff would affect the setting's ability to deliver 30 hours free childcare from 2017, **86% of respondents thought it would have a moderate to severe impact** - with 21% saying it would have a severe impact. Only 14% thought it would not.



Respondents who experienced difficulties in recruiting

"The number of qualified level 3 staff (with appropriate GCSEs) has dropped significantly and the quality of the staff applying for positions has also decreased."



"The potential staff coming forward need to obtain GCSEs which would cost our setting money we don't have to enable career progression."

Training and continuing professional development (CPD)

Respondents were asked about a range of training and staff development issues including where they source training; how it is funded; who they used and barriers to training or lack of access to CPD.

Funding training

How training will be funded in the coming year was mixed according to the type of training accessed. Employers are now the main source of funding for early years practice short courses linked to continuing professional development (CPD), mandatory training and leadership and management training. Employees are most likely to fund fully their own early years degree course. Many local authorities continue to make a contribution to early years CPD and mandatory training.

There has been an increase in employer-funded early years practice training from 64% of providers in 2015 to 79% in 2016, with 55% of providers now contributing the full amount of this training. For mandatory training the picture is similar with 82% of respondents contributing to the cost of training, a rise of 11% on last year with 65% paying the full cost. Local authorities contributed to costs for 34% of providers and of these covered the full cost for 11%, a drop of 13%.

Employers receive less support with funding for leadership and management training with 85% of employers having employees accessing training in this area. Employers funded or partly funded 77% of this training with employees funding or part funding 14% and the local authority funding or part funding 30%.

Overall local authorities are the main funder of early years practice long courses such as level 3 with local authorities contributing fully to just under a quarter (24%) of this training and partly supporting a further 18%. Employers fully funded 20% and partly funded a further 23% whereas 32% of employees funded or part funded their training.

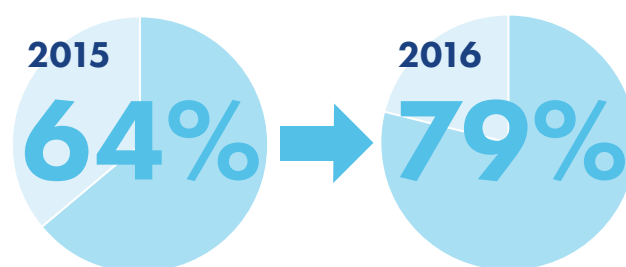
For early years degree courses over half (51%) of employees funded their own education with a further 21% part funding their degree. Employers part funded or fully funded 27% and the local authority contributed some or all of the costs for 22%. Eighty-eight practitioners responding had accessed a student loan to help them pay for their professional development.

When asked how much they spent on training and development last year, 94% of providers responded. Amounts varied from zero to over a million pounds depending on the size of provider. Only two respondents had no funds at all for training.

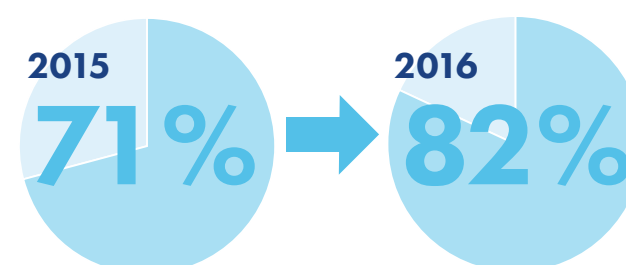
When asked whether the budget was reduced for 2016/17, 31% of respondents said they had a reduced budget, 23% an increased budget and 35% the same budget. A third of all respondents (33%) intended to spend less than £100 per employee. A further 24% intended to spend between £100 and £200.

Reasons why they were spending less on training were varied with 42% responding. Paying the living wage was the most common reason often coupled with paying for pensions and the funding issues connected with offering 30 hours childcare.

Percentage of practice training funded by employers



Percentage of mandatory training funded by employers



Sourcing training

The local authority still remains the main source of training with 87% of respondents using local authorities to source and access training, about the same as last year (88%).

Online training is almost as popular with 86% of respondents using this. Other answers included local training providers (59%) and national membership organisations such as NDNA (57%) with 34% of respondents having an in-house team.

The comments made in response to this question show that developing in-house training is becoming the only viable option for many providers based on costs.

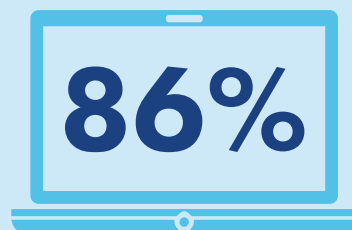
87%

USED LOCAL AUTHORITIES
TO SOURCE TRAINING



86%

USED
ONLINE
TRAINING



Practitioner access to training

Just over a quarter (27%) of practitioners responding were undertaking higher level accredited qualifications and 25% were undertaking accredited qualifications at the same grade as they are now.

Very few practitioners were undertaking training to improve their skills in maths, English and science. Only 7% of practitioner respondents had undertaken training to improve their functional skills in maths and 3% in English. No practitioners had undertaken training in science. **When asked about taking GCSE training 4% had undertaken this in maths, 3% in English and only two in science.**

Almost a third of practitioners (31%) responding had accessed no training to improve their early years practice and skills in the past year, although another third (37%) had completed between one to five days of training.

The practitioners' access to training supports the growing trend identified with employers using cascade methods and in-house training to provide CPD. Just over half the practitioners (53%) had received cascade training and 43% had received in-house training. Very little of this training was given to the full nursery team, just 16 respondents had experienced training of half to one day for the full team and 15 had experienced this for one to five days' duration.

Worryingly around 19% of practitioner respondents have not read any publications or articles or best practice factsheets in the past year, although just over a quarter of respondents (27%) spent more than five days doing so. This rose to almost 27% of practitioners who have not undertaken any research to improve their practice, although again the same sort of percentage (21%) spent more than five days on research.

Where practitioners held a particular area of responsibility they were more likely to access annual specialist training to help them fulfil that role. Around two thirds (65%) of those indicating they held such a responsibility had access to such training although **23% had specific training needs they were unable to access to support their development.** From the answers given **SEND was most commonly cited as hard to access,** followed by access to higher level qualifications sometimes prohibited by difficulties in accessing maths, English and science.

Practitioners were also asked how their CPD was undertaken. Again there was a mix of responses but almost half (47%) combined training done in the nursery time and their own time, paid and unpaid. Almost a quarter did training in their own time unpaid with only 18% having training in nursery time paid. Around 40% of the practitioners had at least one nursery inset day, with the majority of these just one day per year.

Training in SEND

One of the key areas of interest for the Government is children with SEND. The launch of the new SEND Code of Practice in 2015⁴ and the revision of the help available to children with SEND and their families has not been matched with a well trained early years workforce.

The survey looked at numbers of staff who have received training in SEND. Worryingly 5% of providers have no staff with

training in SEND. In those settings where staff have had training, numbers range from one to everyone. When asked about how well their staff team understood their responsibilities in relation to the Education, Health and Care assessment and plans, respondents indicated that they had good or full confidence that those in management positions (85%) or with graduate level qualifications (76%) understood the process. This reduced to 42% for level 3 staff and 15% for level 2 qualified staff.

Availability of CPD

Respondents were asked if there was sufficient CPD available locally. Again almost all respondents (97%) answered this question with 39% agreeing there was sufficient available locally, 49% responding there was insufficient availability and 10% being unsure.

It is apparent from the responses that larger providers, more able to offer in-house training or CPD from senior managers, fare better than smaller providers who tend to be reliant still on local authority training as the most affordable option.

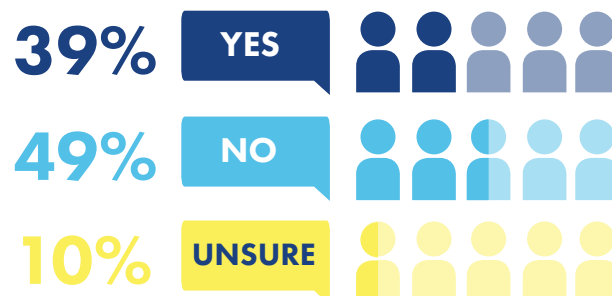
Most of those saying there was insufficient availability cited difficulties in access, capacity and cost as the main reasons. Reductions in local authority training, the distance to travel and the timing of training were also given as reasons alongside the basic nature of the courses being offered.

Around 33% of respondents also felt that the quality of CPD offered locally was not good enough from local authorities and also mentioned the very differing standards of quality from private trainers. Just over 39% of respondents said CPD was not offered at different levels to meet the needs of all staff. The cost of more advanced training was also mentioned as this often has to be accessed through private training providers.

Many providers looked to online training, cascading training or providing in-house training and development to bridge gaps. The larger providers are able to deliver most training through these means but some of the smaller providers were also now looking to do this.

When asked if gaps in training should be addressed by the DfE workforce strategy, 34% of respondents thought this should be the case. They gave a range of training gaps but most commonly mentioned were gaps in training for SEND and helping staff to gain GCSE qualifications in maths, English and science.

Is sufficient CPD available locally?



“If we had more funding we would be able to train more staff, simple really. The choice is often do I pay the staff or do I train them?”

The Government's workforce strategy

Continuing professional development

Respondents were asked about whether CPD should be supported by the Government within its workforce strategy, for example by providing funding to enable a nursery to close for a day to train its staff. A large majority of respondents (82%) expressed a range of views on this. A number thought funding inset days would be very welcome but impractical as children needed continuity of care. Several mentioned early years providers having parity with schools and having five mandatory inset days as well as paid time for staff meetings. How such set requirements might be funded was an issue for many as well as the potential loss of 'personalised' nursery-specific content based on staff needs and interests.

The most popular option was to have Government funding for mandatory training required by the Early Years Foundation Stage such as first aid, safeguarding and food hygiene training, including funding for the courses and for staff cover.

Providers were also asked if set requirements for CPD would be helpful. Almost all providers (97%) answered this question with 44% agreeing that set requirements would be helpful and 56% expressing differing levels of concern that this might be too restrictive, including a number of providers who did not want further Government interference in their business. Some employers and practitioners thought that set requirements might help with consistency of approach and a recognition that set inset days may help raise the importance of CPD with parents.

There was some significant support from practitioners that set requirements might also help some providers recognise the importance of CPD. Views were mixed about how much CPD those without specialist roles should undertake, but the majority of respondents wanted two or three days a year. For those with a specialist responsibility most practitioners (59%) thought they should have five days a year.

Progression pathways

The survey asked employer respondents if it would be helpful for the workforce strategy to provide guidance on career paths and qualifications required for the sector. Almost all respondents (99%) answered this question with 77% agreeing such guidance would be helpful. Those not wanting such guidance commented that Government should not interfere in private businesses and linked this to views about funding the 30 hours and maths and English GCSE requirements.

Practitioners were also asked if they had enough information on progression routes and 44% indicated they did have enough information. Those who did not have enough information said it was a mix of costs and nursery managers not supporting progression or giving enough information. When asked about opportunities and pathways to allow staff to progress, 74% of respondents expressed an opinion, most mentioning the need for funding support and better access to training.

Workforce strategy

Would it be helpful for the workforce strategy to provide guidance on career paths and qualifications?

77% YES 

Progression routes

Practitioners - do you have enough information on progression routes?

44% NO 

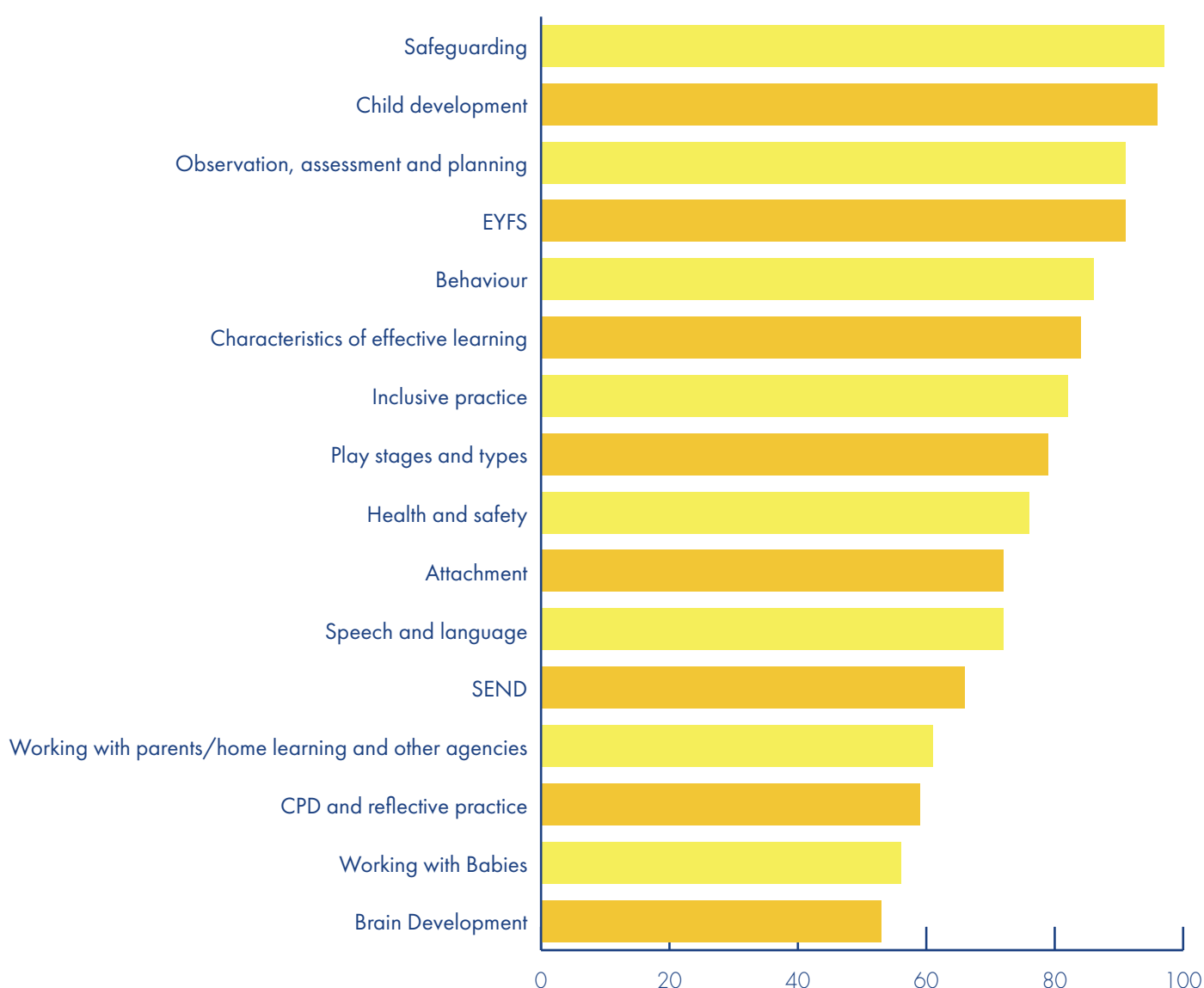
Specialist roles

The survey asked for views on whether the workforce strategy should include guidance and qualifications requirements for specialist roles. Almost all respondents answered this question (97%) with 81% agreeing that guidance would be helpful. Comments mainly related to those who did not want more regulation or Government interference.

Progression pathways and competencies

When asked about the fundamental competencies practitioners must have as professionals and achieve at level 2 and 3, respondents ranked the main areas in the graph below. The additional competencies needed to progress to level 5 or graduate level were split fairly evenly between increased professional early years knowledge and management or business knowledge. This should be used to inform qualification development.

Fundamental knowledge and competencies recognised by employers for level 2 and 3 professions



Apprenticeship levy

The apprenticeship levy requires all employers operating in the UK with a pay bill of over £3 million each year to make an investment in apprenticeships. Only four of the respondents met this criterion and only 8% of respondents had heard about the levy. This affected the number of responses about whether respondents might benefit from the levy. There was a significant split between larger providers, even if not levy payers and smaller providers, with many smaller providers not understanding enough about the issues.

When asked about the ability to take on apprentices or level 2/3 learners if they had to contribute to the cost of training as a non-levy payer, the majority of respondents (74%) thought that this would impact negatively on them. When asked about the impact on supporting practitioners' development from level 2 to level 3 and beyond, 58% of respondents thought that it would and 24% were unsure.

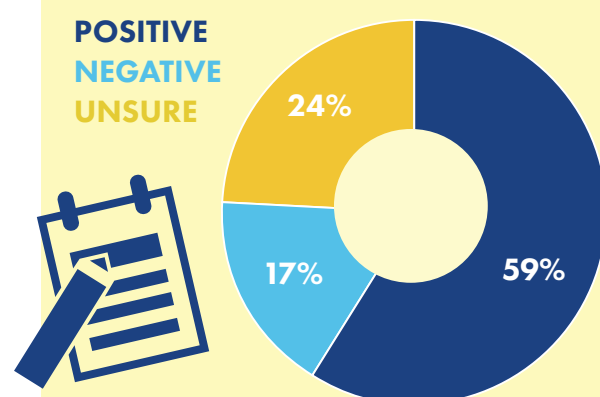
A few providers indicated they would stop taking apprentices and level 2 qualified staff and just employ level 3 instead as this would be more cost effective. This is likely to exacerbate the level 3 recruitment issue further.

Change to GCSE requirements

The survey asked if there was a change within the workforce strategy to GCSE requirements for level 3 training (such as Functional Skills at level 2) what the impact might be on the respondent's nursery business.

Again almost all respondents (99%) replied to this question with 59% agreeing it would have a positive impact, 17% thinking it would have a negative impact and 24% unsure about the impact.

While a number put forward the usual arguments about the impact of qualifications on abilities to care for children, a number of comments supported the idea of GCSE qualifications or at the very least a more literate and numerate workforce.



What impact would a change to GCSE requirements for level 3 training have?

"I have two very competent staff that will not get level 3 status while this GCSE rule stands yet they are fantastic staff!"

"There is a significant shortage of qualified staff with GCSE maths and English. There appears to be a bottleneck of staff who are struggling to obtain either one or both of the entry qualifications."



Survey details

NDNA's Workforce Survey 2016 ran from July 2016 to September 2016 and received 278 responses from employers and 385 responses from practitioners.

The Department for Education will be publishing a workforce strategy for the early years in late Autumn and we will use the results from our 2016 Workforce Survey to lobby policy makers in Government to help shape this strategy.

Who we are

NDNA is a national charity representing children's nurseries across England, Scotland and Wales, giving them information, training and support, so they can provide the best possible care to young children. NDNA is the voice of the sector, which totals 21,000 nurseries and employs 250,000 people - an integral part of the lives of one million children and their families.

National Day Nurseries Association  @NDNATalk  /ndna.org.uk  National Day Nurseries Association www.ndna.org.uk 	NDNA Head Office, National Early Years Enterprise Centre Longbow Close, Huddersfield HD2 1GQ. Tel: +44 (0)1484 40 70 70, Email: info@ndna.org.uk NDNA Cymru, Office 2, Crown House, 11 Well Street, Ruthin, Denbighshire, LL15 1AE. Tel: +44 (0)1824 70 78 23, Email: wales@ndna.org.uk NDNA Scotland, The Mansfield Traquair Centre, 15 Mansfield Place, Edinburgh, EH3 6BB. Tel: +44 (0)1315 16 69 67, Email: scotland@ndna.org.uk
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