

2019

# CHILDREN'S EDUCATION AND CARE

INDUSTRY REFERENCE COMMITTEE

INDUSTRY SKILLS FORECAST



**SKILLSIQ**

CAPABLE PEOPLE MAKE CLEVER BUSINESS

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# Executive Summary

The Children's Education and Care (CEC) sector provides education, care and support to children under eighteen years of age. The sub-sectors include:

- Early childhood education and care (ECEC)
- School age education and care
- Outside school hours care (OSHC)
- Education support.

The sector is large, diverse and growing. Children's education and care services operate under a number of different ownership/management arrangements, including private operators, community and non-profit organisations, state/territory and local governments, and public, independent and private schools. Service types recognised within the National Quality Framework (NQF) are Long-day Care (LDC), Family Day Care (FDC), Outside School Hours Care (OSHC) and Preschools/Kindergartens. In 2017, there were over 149,600 enrolments across all Vocational Education and Training (VET) qualifications catered for by the Children's Education and Care Training Package Products.

Educators play a key role in supporting the social, emotional, physical and educational needs of infants and young children in various early childhood settings. Children are a vulnerable group in society and quite often people working in the children's education and care sectors are in a position to identify concerns and to work with families, allied health professionals and broader groups within communities with respect to sensitive matters which affect children's health and wellbeing. This means that emotional intelligence and 'soft' skills have always been critically important attributes among workers in the sector.

The sector has been evolving over time in response to key reviews and framework developments, and it is expected

to continue adapting as reforms are implemented. There are significant variations across Australia relating to children's age ranges and the environments in which care is provided. However, the National Quality Framework, including seven national standards introduced in 2012, provides a national structural foundation on which to deliver effective ECEC. The sector provides many opportunities, with strong growth envisaged over the next five years. This growth also raises opportunities to improve the quality of care, as well as presenting challenges which will need to be addressed. These can be summarised as follows:

- Government policy/legislative framework reviews and modifications
- The attraction and retention of staff
- The challenges faced by regional and remote communities
- The need for diversity and variance in perspectives
- The need for ongoing professional development.

There is no new Training Package development work proposed for 2019–2020. Please note that the Children's Education and Care Training Package Products are currently being updated as part of an existing project. This update includes six qualifications and associated Units of Competency in early childhood education and care, school age education and care, and education support.

Note: The National Schedule details the Training Package update and development work commissioned by the Australian Industry and Skills Committee (AISC). The National Schedule is informed by this Industry Skills Forecast, which outlines the proposed timing for the update of existing Training Package Products. This Forecast has been compiled using a number of information sources, including academic literature, statistical data, Industry Reference Committee (IRC) member input and expertise, feedback received via public consultation, SkillsIQ's 2019 Future Skills Survey, and an industry analysis of both new and emerging workforce skills needs overseen by the Children's Education and Care IRC.

# Administrative Information

## Industry Reference Committee (IRC)

### Children's Education and Care

The Children's Education and Care Industry Reference Committee (IRC) is responsible for ensuring that nationally recognised qualifications deliver the skills and knowledge required to equip the sectors under its remit with a highly skilled workforce.

## Skills Service Organisation (SSO)

### SkillsIQ Limited

SkillsIQ supports 19 IRCs representing diverse 'people-facing' sectors. These sectors provide services to people in a variety of contexts such as customer, patient or client. The IRCs are collectively responsible for overseeing the development and review of Training Package Products, including qualifications, serving the skills needs of sectors comprising almost 50 per cent of the Australian workforce.

## SkillsIQ's Industry Reference Committees (IRCs)

- Aboriginal and Torres Strait Islander Health Worker
- Aged Services
- Ambulance and Paramedic
- Children's Education and Care
- Client Services
- Community Sector and Development
- Complementary Health
- Dental
- Direct Client Care and Support
- Disability Support
- Enrolled Nursing
- First Aid
- Local Government
- Personal Services
- Public Sector
- Sport and Recreation
- Technicians Support Services
- Tourism, Travel and Hospitality
- Wholesale and Retail Services.

“ It takes skill to make a difference. We will only get skilled, valued and rounded workers when training provider, employee and employer are connected in their views on continuous learning. ”

SkillsIQ's Cross-sector Skills Committee

## IRC Sign-off

Sign-off of this Industry Skills Forecast and Proposed Schedule of Work has been confirmed by the Children's Education and Care Industry Reference Committee.

**Brian Newman,**  
Chair

# A. Skills Forecast

## A.1 Sector Overview

### Introduction

The Children's Education and Care (CEC) sector provides education, care and support to children under eighteen years of age. The sub-sectors include:

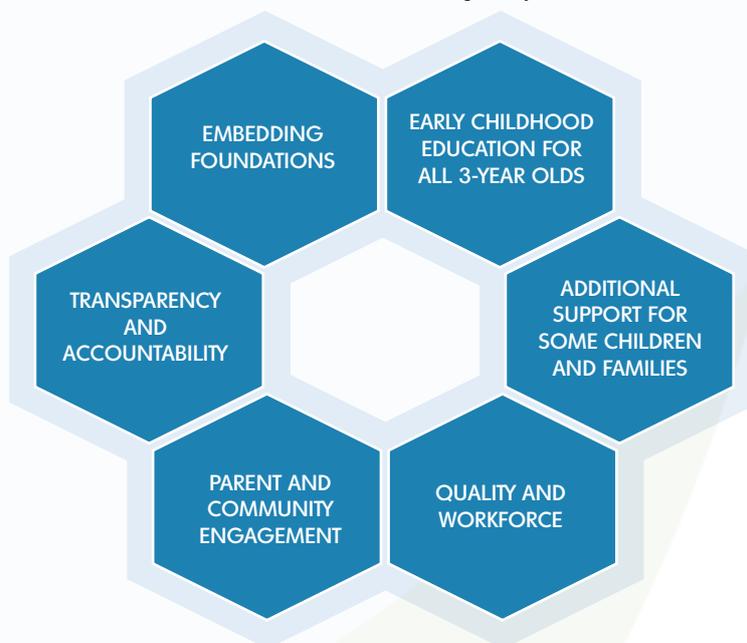
- Early childhood education and care (ECEC)
- School age education and care
- Outside school hours care (OSHC)
- Education support.

**The sector is large, diverse and growing.** Almost every family that lives in Australia has had, or in the future will have, some interaction with one or more of the sub-sectors listed.

Educators play a key role in supporting the social, emotional, physical and educational needs of infants and

young children in various early childhood settings. The sector has been evolving over time in response to key reviews and framework developments, and it is expected to continue adapting as reforms are implemented. For example, the most recent report, *Lifting Our Game: Report of the Review to Achieve Educational Excellence in Australian Schools through Early Childhood Interventions* (December 2017), has identified workforce reforms as one of six key reform themes for the ECEC sector (see Figure 1). In particular, it makes a specific recommendation regarding workforce development and establishing a new national early childhood education and care workforce strategy. In general, the review calls on the broader view of education to include collectively schools and early childhood education, as well maximise consistency of goals and objectives across governments (i.e. federal, state/territory and local) to achieve better outcomes.

**Figure 1:** Six Reform Themes - *Lifting our Game: Report of the Review to Achieve Educational Excellence in Australian Schools through Early Childhood Interventions*<sup>1</sup>



Early childhood educators work in a variety of environments, including those outlined in Table 1. There are significant variations across Australia in the age ranges covered across the different environments.

**Table 1:** Service types across the Children's Education and Care (CEC) industry

	Descriptor	Number of services
Long-Day Care (LDC)	This service provides education and care for children usually aged from birth–5 years	7,669
Family Day Care (FDC)	An increasingly popular service, especially within regional areas, through which flexible education and developmental activities for other people's children are provided in an approved family day care educator's home	618
Outside School Hours Care (OSHC)	Encompassing before- and after-school care, and vacation care, this service provides education and care for school-aged children	4,486
Preschools / Kindergartens	These services generally cater to children 3–5 years of age	3,125

Source: Australian Children's Education and Care Quality Authority, NQF Snapshot Q1 2019

Note: This data is related to approvals and may see LDC & OSHC service types combined under a single approval, thus not portraying a true picture of the number of individual service types.

**Services can operate under a number of different ownership/management types**, including small private operators, community and non-profit organisations, large commercial providers, state/territory and local governments, and public, independent and private schools.

**The industry's<sup>2</sup> revenue is expected to reach \$12.9 billion in 2018–19**, driven by federal government assistance for parents in the workforce; an increasing maternal workforce participation rate; and legislative freedom for child care centres to register as kindergarten providers.<sup>3</sup> The Preschool Education sector is also experiencing strong growth and is expected to reach **\$1.6 billion in revenue by 2018–19**.<sup>4</sup> Growth will be attributed to the continual federal funding for the state and territory provision of preschool services, as part of the National Partnerships Agreements (NPAs) to meet the Council of Australian Governments' (COAG) National Quality Framework objective to achieve universal access to preschool education.

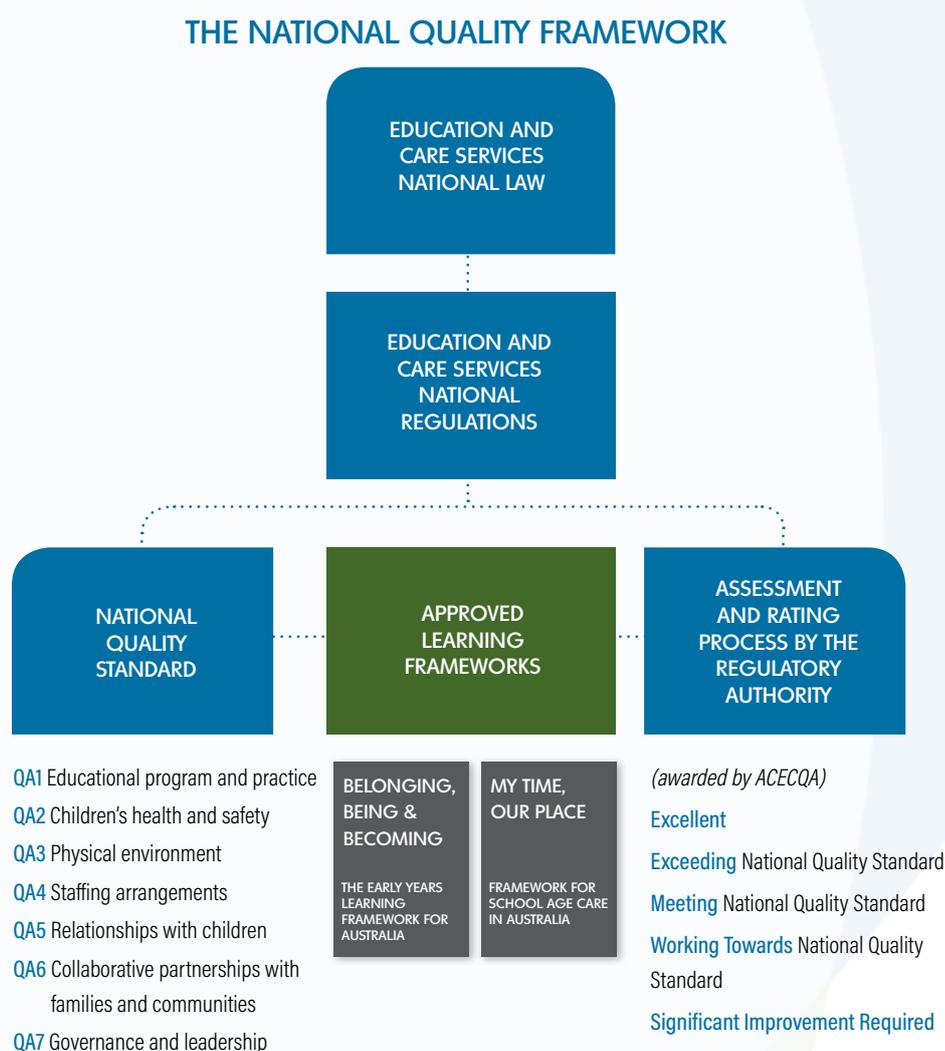
**The Australian Government provides financial assistance** to families, mainly as subsidies, under the Family Assistance Law. A regulatory authority in

each state and territory has primary responsibility for the approval, monitoring and quality assessment of approved education and care providers and services in its jurisdiction. This role is performed under National Law and National Regulations which make up the National Quality Framework (NQF). The Australian Children's Education and Care Quality Authority (ACECQA) is a national body which supports the states and territories in their roles.<sup>5</sup>

### **National Quality Framework**

In 2012, the Australian government presented the National Quality Framework for Early Childhood Education and Care (ECEC). The NQF includes a national legislative framework for regulation and quality assessment of education and child care services; A National Quality Standard (NQS) that benchmarks education and care services; and a national quality rating and assessment process that evaluates services against the National Quality Standard. The NQF provides a structural foundation on which to deliver effective ECEC. An overview of the NQF, including the seven National Quality Standards, is provided in Figure 2.

Figure 2: Overview of the National Quality Framework and structure



Source: The Guide to the National Quality Framework (NQF). ACECQA. <https://www.acecqa.gov.au/nqf/about/guide>

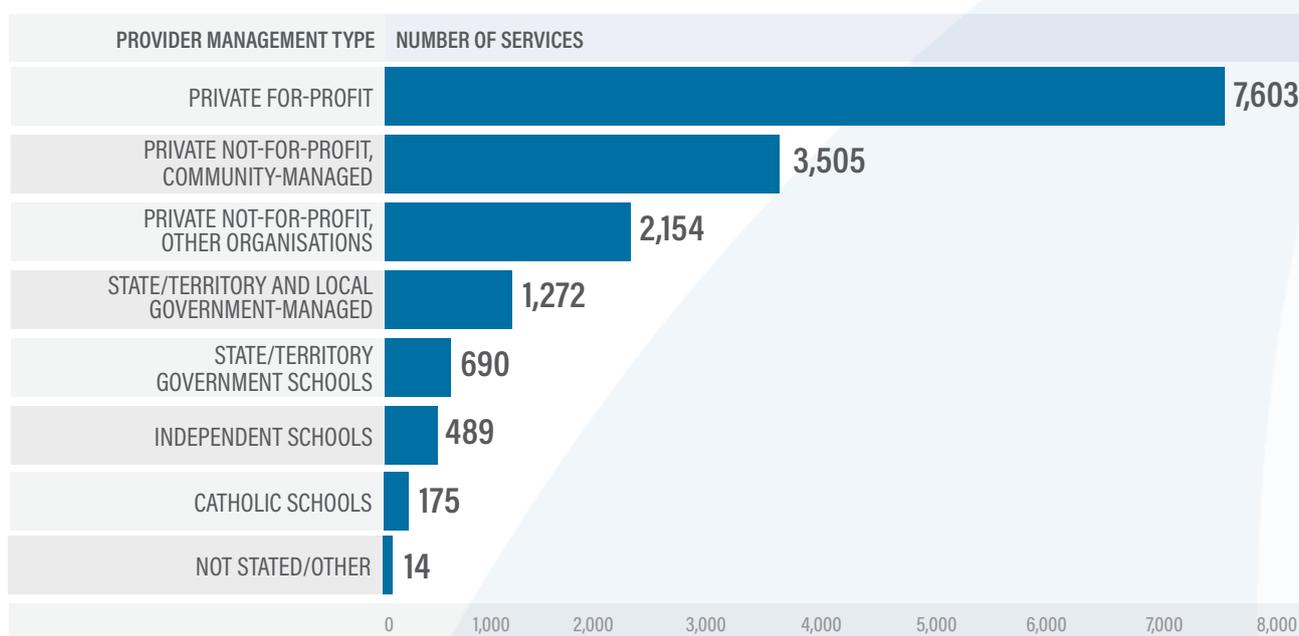
**State and territory governments' roles and responsibilities** vary across jurisdictions. Generally, state and territory governments are responsible for funding and/or providing preschool/kindergarten services. They may solely fund some ECEC services or contribute to services in receipt of Australian Government funding. They also approve ECEC services to operate under the NQF. State and territory governments are responsible for regulating services under the NQF, and their roles and responsibilities can include:

- regulating approved services under the NQF and licensing and/or registering child care services **not** approved under the NQF
- implementing strategies to improve the quality of ECEC programs, and
- providing curriculum, information, support, advice, and training and development to ECEC providers.

## Businesses Involved

Businesses operating in the service areas outlined earlier include a range of public and private, small, medium and large enterprises, spread across the country. Descriptors of the main service types have been outlined earlier (i.e. family day care, long-day care, etc.) and a further breakdown of the service providers by management type is outlined below, showing that nearly half are private, for-profit organisations:

**Table 2:** Total number of services by provider management types across the Children's Education and Care (CEC) industry



Source: Australian Children's Education and Care Quality Authority, NQF Snapshot Q1 2019

Note: This data is related to approvals and may see LDC & OSHC service types under a single approval, thus not portraying a true picture of the number of individual service types.

## Stakeholders

Key stakeholders represent a range of organisations that perform a variety of strategic, regulatory and operational roles in the Children's Education and Care sector.

Stakeholders play an important role during Training Package updates by supplying industry insights to ensure proposed changes are in line with industry needs.

Examples of stakeholder organisations include:

- Government departments and agencies (Commonwealth and state/territory-based)
- Peak bodies and industry associations (i.e. across the sectors listed earlier)
- Employee associations
- Registered Training Organisations (RTOs) both public and private and their representative bodies

- Small, medium and large-sized private and public employers across metropolitan, regional, rural and remote areas, including for-profit and not-for-profit organisations.

## Challenges and Opportunities

Note: These findings are based on desk research and SkillsIQ's *2019 Future Skills Survey* (conducted between November 2018 and January 2019) which have been filtered to include stakeholders from the Children's Education and Care sector only. Further consultation will be used to validate this information and provide further insights.



## **Government policy / legislative framework environment**

### **National Quality Review 2019**

The National Quality Framework (NQF), which provides a national approach to the regulation of the quality of education and care services across Australia, is under review.<sup>8</sup> This is a significant national project which is being conducted from April 2019. An issues paper<sup>9</sup> is available and Phase One of the consultation process is scheduled to run from April – July 2019.

### **Impact of regulation**

In October 2016, the Senate established a Select Committee on Red Tape to inquire into and report on the effect of restrictions and prohibitions on business, the economy and the community. The introduction of the NQF for the ECEC sector has provided a more nationally unified system but has also raised several administration and compliance issues for providers. In 2018 the interim report, *Effect of red tape on child care*, was published and raised a number of key issues (and subsequent recommendations):<sup>10</sup>

- **Family day care sector:** The family day care sector is predominantly impacted by regulatory compliance costs and caps on the number of educators registered with an approved service.
- **Staffing and qualification requirements:** There is a lack of an evidence base for the current staffing ratios imposed (educator-to-child, coordinator-to-educator, etc.). There is also a lack of consensus on evidence regarding higher qualifications obtained by educators leading to better outcomes for children.
- **Regulatory compliance costs:** Although 97% of the ECEC sector support the NQF, more than 60% believe that the NQF increases paperwork and that the sector spends considerable time and money on compliance.

The recommendations made by the Select Committee seek to minimise the regulation and compliance issues being experienced across the CEC sector.

During the review, IRC members were active in submitting responses on behalf of their organisations which are available via the Parliament of Australia website.<sup>11</sup> In addition, feedback has highlighted research and literature

which suggests an alternative view to the issues raised via the inquiry. For example, a number of studies show that both educator qualifications and ratios have a direct impact on the overall quality of education and care services and in return, have a significant long-term impact on child outcomes and return on investment.<sup>12</sup> Overall, there is ongoing and contemporary research available which continues to add data and qualitative perspectives to support broad studies such as those relating to the links between service quality, staff qualifications and child outcomes and progress throughout life.

### **Child Care Subsidy**

The sector is sensitive to changes in government policies and funding. The Child Care Subsidy is the most recent reform and was introduced in July 2018.<sup>13</sup> Concerns are being expressed about the impact of requirements on disadvantaged families. For example, the activity test which is used to determine the number of hours of subsidised care to which a family is entitled requires household members to be involved in a structured employment or learning activity.<sup>14</sup> This criterion is considered to disadvantage these families, as some parents and/or partners may not be participating in either employment or learning. The structure of the Subsidy has been in place since July 2018 and other impacts will continue to arise as the implementation period progresses. The new requirements are of particular concern in remote communities where meeting the current activity requirements is more challenging than under the Budget-based Funded Programs (BBFP) which previously applied.

Child care, early childhood education and family subsidies have been ongoing areas of focus for political parties, whether they are in government or not, and in the recent federal election, both major parties (i.e. the Coalition and Labor) expressed strong policy positions in their election campaigns.

### **Royal Commissions and other sector activities**

In April 2013, public hearings commenced for the federal **Royal Commission into Institutional Responses to Child Sexual Abuse**. The final report was released on 15 December 2017. The recommendations from the report that refer to education and care settings are as follows (Volume 6, Recommendation 6.2):<sup>15</sup>

... *The national strategy to prevent child sexual abuse should encompass the following complementary initiatives:*

*prevention education for tertiary students studying university, technical and further education, and vocational education and training courses before entering child-related occupations. This should aim to increase awareness and understanding of the prevention of child sexual abuse and potentially harmful sexual behaviours in children.*

Other Royal Commissions and associated framework developments applicable to the ECEC sector include:

- The Victorian *Royal Commission into Family Violence* (established in February 2015)
- *Our Watch* – a national initiative launched in 2014 which reports on and advocates for national bipartisan and preventative measures, raising the level of awareness and understanding of the complexity of family violence within Australian society.<sup>16</sup>
- *Change the Story* (a framework for the prevention of violence against women in Australia) is currently being reviewed, including the initiation of an *Intersectional Approach 2017–18*.<sup>17</sup>

In addition, a number of VET and teaching-related reviews have been conducted recently, the outcomes of which are of relevance to the wider VET-sector of which the Children's Education and Care Training Package Products form a part. Some examples include the Australian Government's *Review of the Vocational Education and Training (VET) Sector* (where a final report was delivered in March 2019),<sup>18</sup> the *National Review of Teacher Registration* (where an Expert Panel made 17 recommendations in its final report submitted in September 2018),<sup>19</sup> and the Department of Education and Training's *Consultation on Unduly Short Courses and Training Product Reforms* (conducted between December 2017 and March 2018).<sup>20</sup>

Overall, recommendations and findings from the Royal Commissions, as well as reviews and updates conducted by state, territory and advocacy bodies, will impact the ways of working and the skills needs of the current workforce supported by these Training Package Products.

For example, the findings and recommendations of the Victorian *Royal Commission into Family Violence* established the need to raise awareness of domestic and family violence as well as undertaking training for the current and future workforce, so workers are better equipped to understand their roles and responsibilities and take the appropriate action within the authority of their job roles, and the legislative framework.

The update work currently taking place on the CEC Training Package Products takes into particular account the recommendations of the federal *Royal Commission into Institutional Responses to Child Sexual Abuse*.

### **Skills shortages**

The CEC sub-sectors are all experiencing skills shortages with their current workforces, and this issue has been voiced by industry through various channels, including SkillsIQ's *2019 Future Skills Survey* conducted between November 2018 and January 2019. The workforce is involved in delivering a range of services to infants and children and, depending on the structure of the service of the employing provider, individuals may also be tasked with a range of administrative, supervisory and management activities.

Skills gaps identified represent a combination of technical and 'soft skill' areas, with examples including:

- Digital literacy and computer application
- Language, literacy and numeracy (LLN)
- Communication (to engage with families, work peers, allied health professionals, etc.)
- Business skills (in particular for Family Day Care providers, to become adept at understanding the liabilities and responsibilities, including risk management, of running a small business)
- Problem solving
- Leadership of, and within, work groups
- Reflection.

Reflection is a particular skill area that has been raised during the update work of the CEC Training Package. Terminology and associated practices have implications for the skills acquired and used by educators throughout their careers. Reflective practice is increasingly recognised as an essential skill area for educators to possess, as it is considered highly effective in supporting children's

advanced learning and development.<sup>21</sup> Industry has particularly voiced that 'critical reflection' is a high-level cognitive skill that needs to be learnt and developed over time with practical experience.

Across the sector, a range of pedagogical and philosophical approaches may inform practice in particular services. These may include Montessori, Steiner, Reggio Emilia, multi-age grouping, bush kinder, and rights-based approaches. Whilst new graduates may have a broad understanding of a range of approaches to learning, it is the responsibility of services to ensure they provide employees with detailed training programs that are congruent with their own particular philosophies.

ECEC is also part of a broader Early Childhood Development (ECD) workforce. It will be beneficial to enhance the skills of ECEC educators to effectively engage with other ECD professionals towards the integration of early childhood services. The integration of ECD services encompasses a wide range of professionals working with children and families, including child and family health services, social workers, family support workers, child protection officers, speech therapists and physiotherapists. Enhanced integration of ECD service delivery supports the accessibility and responsiveness of services to better meet the needs of families.<sup>22</sup> To achieve integration, it is important for ECEC workers to possess the confidence and skills to interact with other ECD professionals to benefit the children under their care.

An area for possible future development is the emerging need for national Training Package Products that address two key leadership skills areas. Firstly, there is a growing awareness of the importance of management skills for those in senior positions in CEC services. These include finance and administration and, particularly, skills needed for the management of staff. Secondly, every service under the NQF is required to have a designated Educational Leader, and there is an emerging need for education and training with a focus on pedagogical leadership. This could lead to an Advanced Diploma qualification with two alternative streams: managerial leadership and educational leadership.

SkillsIQ and the CEC IRC will continue to liaise with the sector to measure the need for such future Training Products.

## Regional and Remote Communities

In 2018, approximately one-third of Australia's population lived in rural and remote areas (8.13 million people).<sup>23</sup> Australians living in rural and remote areas tend to experience unique challenges due to their geographic isolation from major cities. Within the ECEC context, it can be more difficult to create a sustainable workforce that has access to continual training and professional development.

Furthermore, rural and remote areas are home to many Aboriginal and Torres Strait Islander communities. A workforce that is familiar with matters of Aboriginal cultural significance, including communication methods and respected networks, can deliver a trusted and more targeted service to families in these communities. As such, it will be beneficial to attract Aboriginal and Torres Strait Islander ECEC workers from within their communities. The recognition of skills and pathways for Aboriginal and Torres Strait Islander ECEC workers in these communities is critical to delivering strong outcomes within these communities and addressing issues of disadvantage.

With the introduction of the new Child Care Subsidy in June 2018, Budget-based Funded Programs (BBFP) that supported child care services in locations where the for-profit market was not viable were abolished. However, eligible services are now supported by other programs. Please refer to the *Child Care Provider Handbook (Section 9. Services exempt from the National Law and Regulations)* for an overview of the current exemption requirements. Concerns have been expressed in relation to the administrative and reporting processes now required and in relation to decline in enrolments/numbers as a result of the new Child Care Subsidy requirements.

Regional and remote communities can also face barriers in accessing flexible training delivery options which require internet access and other resources. Planned approaches incorporating residential training programs can be of benefit, and it is critical that these and other options be considered for these communities in relation to providing successful skills development initiatives.

## Retention of staff

Staff retention is a significant issue within the ECEC industry. There is competition between long-day care services and preschools/schools to attract and retain teachers. Preschools/schools typically offer teachers higher salaries, shorter and more consistent hours, more leave entitlements and a professional status. As a result, many ECEC teachers leave the long-day care sector due to relatively low wages, longer hours, low professional status and difficult work conditions (i.e. both physically demanding and stressful).<sup>24,25</sup> A recent Australian study found that one in five educators plan to leave their job within twelve months<sup>26</sup> due to low pay, feeling undervalued and an increase in the amount of time spent on paperwork.<sup>27</sup> Cited reasons for low pay in the ECEC sector include a high proportion of female workers; dependency of educators on modern awards that set minimum standards of pay and conditions; and various funding models that operate in the sector.<sup>28</sup> The current low level of remuneration makes it difficult to retain highly qualified staff. Furthermore, the unfavourable work circumstances can act as barriers to educators investing additional time and resources into upskilling/professionalisation.<sup>29</sup>

Remuneration of ECEC staff was a particular area of focus during the 2019 federal election by the Labor Party, who announced wage increases to be phased in over the next eight years.<sup>30</sup> Although Labor did not form the government, at the time of writing remuneration and working conditions within the sector continue to be debated by a cross-section of stakeholders and at both state and federal levels of government.

The issue of staff turnover can act as a disincentive to employers to invest in workplace training. However, ongoing professional development opportunities are necessary for quality provision of ECEC services. ECEC is recognised as a profession that requires strong and broad-reaching relationship-building skills as well as specialist skills and knowledge which support children's development and learning. Quality professional development learning opportunities are required to ensure workforce skills remain updated and relevant to

the workplace environment, and to ensure that industry is kept abreast of evidence-based theory and practice. Additionally, professional development must continue post-qualification to support the embedding of learning. The National Quality Standard outlines the requirement for continuous improvement through the implementation of 'effective self-assessment and quality improvement processes'.<sup>31</sup> Well-trained and qualified ECEC educators equipped with the relevant knowledge, skills and attributes provide quality outcomes for children.

The NQF supports professionalisation through its updated and nationally consistent qualification requirements and references to capability, leadership, teaching and learning. The promotion of qualification pathways and professional learning expectations can also contribute to improved professionalisation in the industry.

## Vocational Education and Training (VET) Qualifications Supporting Industry

The nationally recognised VET qualifications that cater to this sector are:

### Early childhood education and care (ECEC)

- CHC30113 Certificate III in Early Childhood Education and Care
- CHC50113 Diploma of Early Childhood Education and Care

### School age education and care

- CHC40113 Certificate IV in School Age Education and Care
- CHC50213 Diploma of School Age Education and Care

### Education support

- CHC30213 Certificate III in Education Support
- CHC40213 Certificate IV in Education Support

**Table 3:** Number of Registered Training Organisations (RTOs) by nationally recognised **Children's Education and Care** qualifications on scope – Children's Education and Care Training Package Products

Qualification Code	Qualification Name	No. of RTOs with Qualification on Scope
<b>Early childhood education and care (ECEC)</b>		
CHC30113	Certificate III in Early Childhood Education and Care	435
CHC50113	Diploma of Early Childhood Education and Care	403
<b>School age education and care</b>		
CHC40113	Certificate IV in School Age Education and Care	44
CHC50213	Diploma of School Age Education and Care	41
<b>Education support</b>		
CHC30213	Certificate III in Education Support	122
CHC40213	Certificate IV in Education Support	75

Source: Training.gov.au. RTOs approved to deliver this qualification. Accessed 12 February 2019.



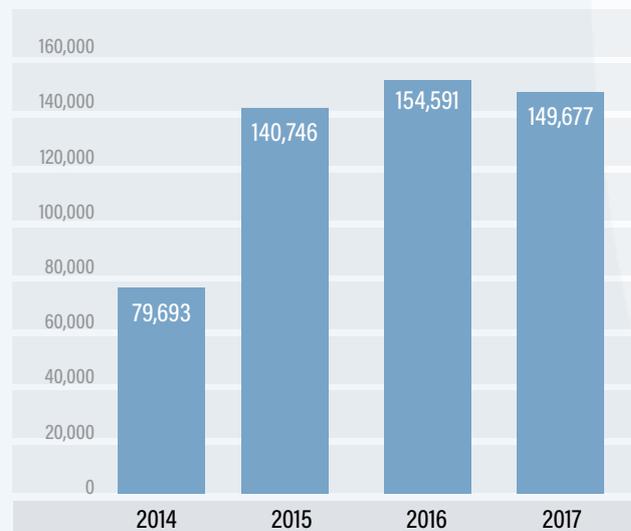
### Enrolments and Completions

In 2017, there were approximately **149,600 enrolments** across all VET qualifications catered for by the Children's Education and Care Training Package Products. This represents a 3% decrease (equivalent to 4,914 enrolments) from the previous year (see Figure 3).

The most popular qualifications in 2017 were:

- CHC50113 Diploma of Early Childhood Education and Care (67,532 enrolments)
- CHC30113 Certificate III in Early Childhood Education and Care (54,226 enrolments).

**Figure 3:** Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope – Children's Education and Care Training Package Products, 2014-2017



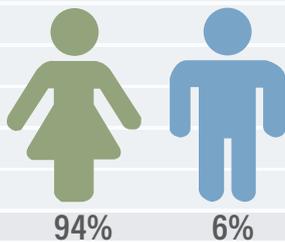
Source: NCVET VOCSTATS. Program enrolments 2014-2017.

A snapshot of key traits of the *HLT Training Package - Children's Education and Care* enrolments for 2017 is provided below, followed by a breakdown of enrolments and completions for individual qualifications (see Table 4 and Table 5).

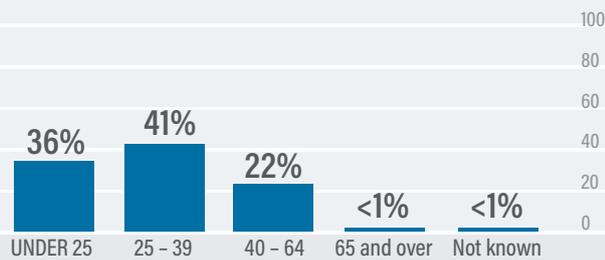
## 2017 ENROLMENT SNAPSHOT

### CHILDREN'S EDUCATION AND CARE TRAINING PACKAGE PRODUCTS

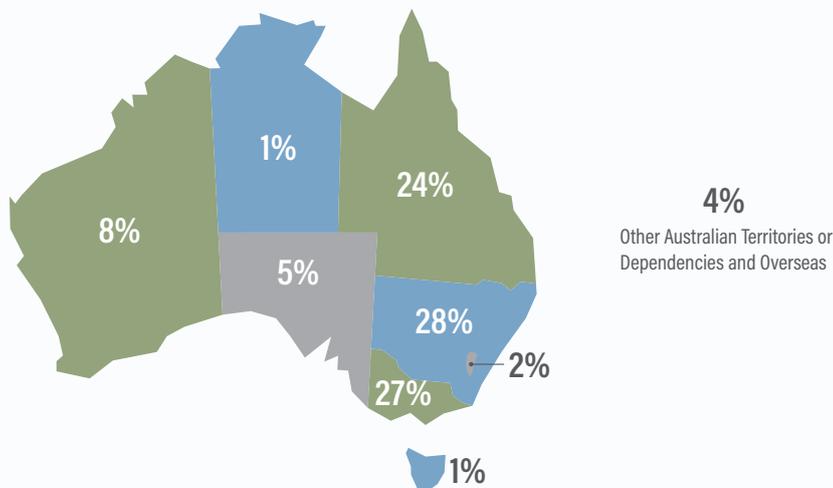
#### GENDER



#### AGE

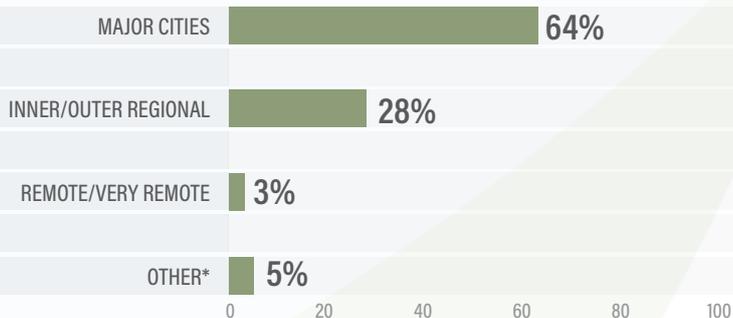


#### STATE/TERRITORY OF RESIDENCE



#### STUDENT REMOTENESS REGION

2011 Accessibility and Remoteness Index of Australia (ARIA+)



Source: NCVER VOCSTATS. Program enrolments 2017 by various breakdowns.

\*Includes 'Outside Australia' and 'Not known'.

#### General notes on statistics:

1. Enrolment and completion data is sourced from NCVER VOCSTATS (program enrolments and completions 2014–2017), accessed August 2018.
2. The increase in enrolments and completions between 2014 and 2017 is due in part to the inclusion of private providers in 2015.
3. It is important to note that not all training providers were required to submit enrolment and completion data at the time of collection, and some figures presented may therefore under-represent the true count of enrolments and completions for a qualification. From 2018, **all** training providers were required to submit data, and current discrepancies noted in the national NCVER figures versus actual attendance should therefore be minimal in future releases. The data presented in this report is shown for indicative purposes.
4. Figures reflect public and private RTO data.
5. Completion data for 2017 represents preliminary outcomes (i.e. not a full year).
6. Superseded qualifications and their respective enrolment and completion data are not tabled.

**Table 4:** Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope – Children's Education and Care Training Package Products, 2014–2017

Qualification	2014	2015	2016	2017	TOTAL
CHC30113 Certificate III in Early Childhood Education and Care	34,187	51,954	54,300	54,226	194,657
CHC30213 Certificate III in Education Support	8,303	16,062	17,816	18,413	60,594
CHC40113 Certificate IV in School Age Education and Care	337	703	436	479	1,954
CHC40213 Certificate IV in Education Support	1,757	4,059	6,134	8,022	19,974
CHC50113 Diploma of Early Childhood Education and Care	34,901	67,397	75,060	67,532	244,889
CHC50213 Diploma of School Age Education and Care	208	571	845	1,005	2,631

Source: NCVET VOCSTATS. Accessed August 2018.

**Table 5:** Total number of completions (Total VET Activity [TVA]) by nationally recognised qualifications on scope - Children's Education and Care Training Package Products, 2014–2017

Qualification	2014	2015	2016	2017	TOTAL
CHC30113 Certificate III in Early Childhood Education and Care	5,492	15,055	15,610	15,021	51,171
CHC30213 Certificate III in Education Support	1,469	3,951	4,943	5,489	15,857
CHC40113 Certificate IV in School Age Education and Care	65	346	144	122	677
CHC40213 Certificate IV in Education Support	469	1,693	2,355	2,803	7,322
CHC50113 Diploma of Early Childhood Education and Care	1,682	8,583	15,542	13,538	39,345
CHC50213 Diploma of School Age Education and Care	7	76	178	227	486

Source: NCVET VOCSTATS. Accessed August 2018.

## A.2 Employment and Skills Outlook Overview

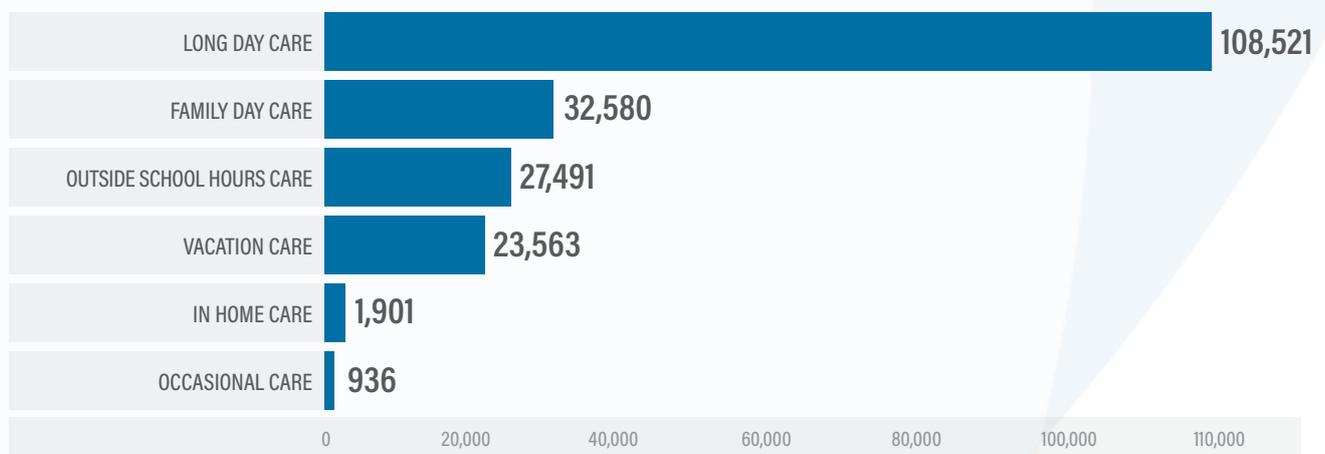
### Employment – Current and Projected

Note: The principal data source that provides workforce data and trends regarding roles of relevance to this Training Package at a national level is Census data collected by the Australian Bureau of Statistics (ABS) and the Department of Jobs and Small Business. Workforce data for this sector is also collected via the Department of Education and Training's Early Childhood Education and Care National Workforce Census. This Census data has been the main source used to outline workforce trends.

The Department of Education and Training conducts the *Early Childhood Education and Care National Workforce Census* every three years to improve the quality of information used to develop and measure early childhood policy and programs. The latest Census was conducted in 2016.

The majority of ECEC workers are employed in Long Day Care (108,521 which is equivalent to 55.7%) (Figure 4), followed by a relatively uniform spread of workers across Family Day Care (32,580, 16.7%), Outside School Hours Care (27,491, 14.1%) and Vacation Care (23,563, 12.1%).

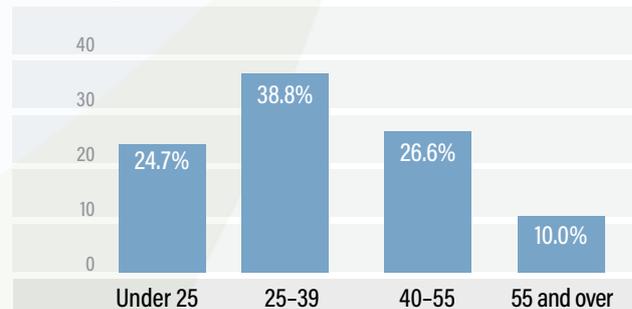
**Figure 4:** Size of ECEC workforce (total number) in Australia, 2016



Source: Department of Education and Training (2016) - 2016 Early Childhood Education and Care National Workforce Census. The Social Research Centre.

In 2016, the majority of ECEC workers were between 20–24 years of age (19.6%), followed by 25–29 years (15.2%) and 30–34 years (12.7%) (see Figure 5).<sup>32</sup> The majority of ECEC workers were female (91.1%).<sup>33</sup>

**Figure 5:** Age distribution of ECEC workforce (%) 2016



Source: Department of Education and Training, 2016 ECEC National Workforce Census

The majority (85.2%) of paid contact staff in the ECEC workforce had an ECEC-related qualification (see Table 6); 38.0% had a Certificate III/IV, 34.1% had a Diploma or Advanced Diploma, and 11.9% had a Bachelor degree or above in an ECEC-related field. Almost all paid contact staff in Occasional Care (95%), Family Day Care (93.2%)

and Long-day Care (91.8%) services had an ECEC-related qualification. Paid contact staff were most likely qualified at the Certificate III/IV level in Family Day Care Services (54.3%) and the Diploma/Advanced Diploma level in Occasional Care Services (47.5%).

**Table 6:** Highest level of ECEC-related qualifications of paid contact staff by service type(a)(b)

Highest level of qualification completed	Long Day Care	Family Day Care	In Home Care	Occasional Care	Outside School Hours Care	Vacation Care	Total
Bachelor degree and above	12.9%	3.0%	8.9%	9.8%	14.0%	18.7%	11.9%
Advanced Diploma / Diploma	38.8%	34.6%	22.4%	47.5%	22.5%	21.4%	34.1%
Certificate III / IV	39.1%	54.3%	31.9%	35.8%	23.1%	21.9%	38.0%
Below Certificate III	1.0%	1.3%	3.0%	1.9%	1.8%	1.7%	1.2%
Total staff with an ECEC-related qualification (c)	91.8%	93.2%	66.2%	95.0%	61.4%	63.7%	85.2%
Total staff without an ECEC-related qualification (c)	8.2%	6.8%	33.8%	5.0%	38.6%	36.3%	14.8%

Source: Department of Education and Training (2016) - 2016 Early Childhood Education and Care National Workforce Census. The Social Research Centre.

Note:

(a) Totals may not equal the sum of components due to rounding of weighted data.

(b) Table includes paid contact staff only (staff who are paid and doing primary or other contact work).

(c) ECEC-related qualifications include early childhood teaching, primary teaching, other teaching, child care, nursing (including Mothercraft nursing), other human welfare studies, behavioural science and other early childhood education and care-related qualifications.

Note: The workforce statistics and projections presented in the following section are based on Census collections, and are reported according to prescribed Australian and New Zealand Standard Industrial Classification (ANZSIC) and Australian and New Zealand Standard Classification of Occupations classifications (ANZSCO). The current definitions, and the labelling used for some ANZSIC and ANZSCO codes, as well as the aggregation of roles across codes, can be limited in providing a true picture of some sectors' workforces. Sectors can host a multitude of job functions, and consequently comprise job titles which go beyond the categories listed in ANZSCO. The statistics in this section are provided as an indicative overview of the sector only.

The relevant job roles are captured across the following ANZSCO categories. National forecast data is presented below for these job roles in order to depict potential future demand across the education sector as a whole:

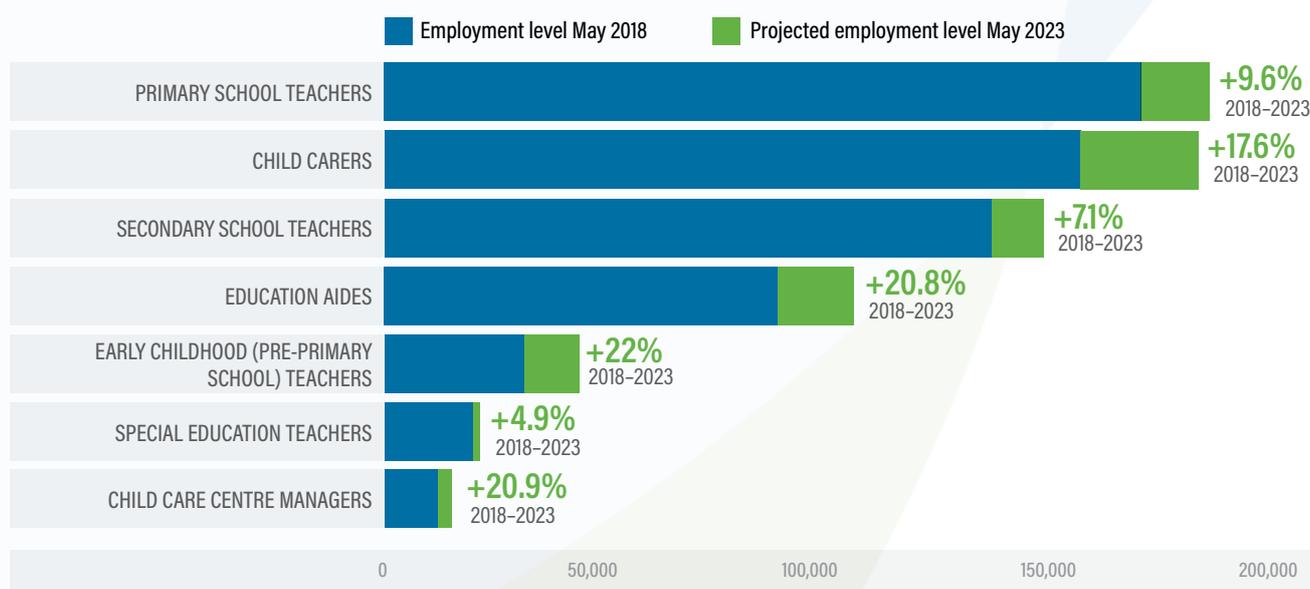
- ANZSCO 2411 **Early Childhood (Pre-primary school) Teachers** – representing in aggregate Kindergarten and Early Childhood (pre-primary school) Teachers.
- ANZSCO 4221 **Education Aides** – representing in aggregate Aboriginal and Torres Strait Islander Education Workers, Integration Aides, Preschool Aides and Teacher’s Aides.
- ANZSCO 4211 **Child Carers** – representing in aggregate Child Care Workers, Family Day Care Workers, Out of School Hours Care Workers and Nannies.
- ANZSCO 2412 **Primary School Teachers**
- ANZSCO 2415 **Special Education Teachers** – representing in aggregate Special Needs Teachers, Teachers of the Hearing Impaired, Teachers of the Sight Impaired and Other Special Education Teachers.
- ANZSCO 2414 **Secondary School Teachers**
- ANZSCO 2413 **Middle School Teachers**
- ANZSCO 1341 **Child Care Centre Managers.**

Over the next five years there is predominantly strong growth in the children’s education and care sector. Early childhood (pre-primary school) teacher job roles will experience the largest relative growth in the sector, growing by 22% or reaching 9,000 jobs by 2023 (see Figure 6).

State-based government policy initiatives can have a significant impact on the demand for job roles in the sector, and current examples of this are policies relating to various subsidised programs for 3-year olds which have been enacted in NSW, Victoria and Tasmania.<sup>34</sup>

In absolute terms, child carers are expected to experience the largest surge in jobs, with a forecast of **27,600 jobs growth** by 2023. Other noteworthy strong job growth trends over the next five years will be experienced by education aides (20.8% or 18,800 jobs), child care centre managers (20.9% growth to 16,000 jobs) primary school teachers (9.6% or 16,300 jobs) and secondary school teachers (7.1% or 9,900 jobs).

**Figure 5:** Employment levels (May 2018 and May 2023) and forecast % growth to May 2023 for selected occupations in Children’s Education and Care



Source: Department of Jobs and Small Business. 2018 Occupational Projections – five years to May 2023. Accessed November 2018.

## Future Skills

Note: The findings are based on desk research as well as SkillsIQ's *2019 Future Skills Survey* (conducted between November 2018 and January 2019) which have been filtered to include stakeholders from the Children's Education and Care sector only. Further consultation will be used to validate this information and provide further insights.

The work environment across all industries is continuously evolving to adapt to external and internal industry trends. Technology, automation, Artificial Intelligence (AI),

globalisation, an ageing population, shifts in workforce demographics and industry (i.e. the transition from manufacturing and production to a largely service-based economy)<sup>35</sup> are just some of the ongoing trends driving change. The Children's Education and Care sector, like others, has been impacted by these trends and, as a result, so too have the skills needs of the workforce. Whilst technical skills to perform job tasks are imperative, employers in the short-to-medium future will be looking beyond these and have indicated that it will be important for workers in their organisations to be **equipped with key soft skills**:



CRITICAL THINKING



EMOTIONAL INTELLIGENCE



PROBLEM-SOLVING



RESILIENCE, STRESS TOLERANCE AND FLEXIBILITY



TEAMWORK AND COMMUNICATION

These results are in line with wider studies, including the World Economic Forum and its *Future of Jobs Survey 2018* which indicates that the top skills in demand in 2022 will include **analytical thinking** and **innovation, creativity, originality** and **initiative, critical thinking, complex problem-solving, leadership** and **emotional intelligence**.<sup>36</sup>

The VET system plays a pivotal role in supporting employers and employees in adapting to technologies and changes in the workplace. Its role in skilling the workforce with current and emerging skills needs will only grow more strongly in the future as it continues to support individuals entering the workplace or transitioning into different roles.<sup>37</sup>

Perhaps more significant to job roles in the Children's Education and Care sectors is the fact that workers have always been required to have strong **communication** and **emotional intelligence skills**. The ability to engage with children is a fundamental practical skill with unique benefits in the work context. Consultation in relation to the update of the existing Training Package Products has highlighted the significance of skills relating to **reflection** and the role these play in **translating theory into practice** in the ongoing professional development of educators. Skills such as these can be enhanced over time with practical application and ongoing communication with peers and leaders within the workplace.

The 12 generic skills listed below, including the descriptors, were provided by the Department of Education and Training for the purpose of being ranked by industry representatives. For the 2019 ranking exercise, an 'Other' generic skill option was included in the list to capture any additional key skills considered important for an industry. Please note that, in this case, no other generic skills were identified.

### Key Generic Skills – Ranked in Order of Importance

1	<b>Language, Literacy and Numeracy (LLN)</b> - Foundation skills of literacy and numeracy.
2	<b>Learning agility / Information literacy / Intellectual autonomy and self-management</b> - Ability to identify a need for information. Ability to identify, locate, evaluate, and effectively use and cite the information. Ability to discriminate and filter information for importance. Ability to do more with less. Ability to quickly develop a working knowledge of new systems to fulfil the expectations of a job.
3	<b>Communication / Collaboration including virtual collaboration / Social intelligence</b> - Ability to understand and apply the principles of creating more value for customers with fewer resources (lean manufacturing) and collaborative skills. Ability to critically assess and develop content that uses new media forms and leverage these media for persuasive communications. Ability to connect to others in a deep and direct way, to sense and stimulate reactions and desired interactions.
4	<b>Design mindset / Thinking critically / System thinking / Solving problems</b> - Ability to adapt products to rapidly shifting consumer tastes and trends. Ability to determine the deeper meaning or significance of what is being expressed via technology. Ability to understand how things that are regarded as systems influence one another within a complete entity, or larger system. Ability to think holistically.
5	<b>Customer service / Marketing</b> - Ability to interact with other human beings, whether helping them find, choose or buy something. Ability to supply customers' wants and needs both via face-to-face interactions or digital technology. Ability to manage online sales and marketing. Ability to understand and manage digital products.
6	<b>Environmental and Sustainability</b> - Ability to focus on problem solving and the development of applied solutions to environmental issues and resource pressures at local, national and international levels.
7	<b>Technology use and application skills</b> - Ability to create and/or use technical means, understand their interrelation with life, society, and the environment. Ability to understand and apply scientific or industrial processes, inventions, methods, etc. Ability to deal with increasing mechanisation and automation and computerisation. Ability to do work from mobile devices rather than from paper.
8	<b>Managerial / Leadership</b> - Ability to effectively communicate with all functional areas in the organisation. Ability to represent and develop tasks and work processes for desired outcomes. Ability to oversee processes, guide initiatives and steer employees toward achievement of goals.
9	<b>Science, Technology, Engineering and Maths (STEM)</b> - Sciences, mathematics and scientific literacy.
10	<b>Entrepreneurial</b> - Ability to take any idea, whether it be a product and/or service, and turn that concept into reality and not only bring it to market, but make it a viable product and/or service. Ability to focus on the very next step to get closer to the ultimate goal.
11	<b>Data analysis skills</b> - Ability to translate vast amounts of data into abstract concepts and understand data-based reasoning. Ability to use data effectively to improve programs, processes and business outcomes. Ability to work with large amounts of data: facts, figures, number crunching, analysing results.
12	<b>Financial</b> - Ability to understand and apply core financial literacy concepts and metrics, streamlining processes such as budgeting, forecasting, and reporting, and stepping up compliance. Ability to manage costs and resources, and drive efficiency.



## A.3 Key Drivers for Change and Proposed Responses Overview

### Key Drivers

There is no new Training Package Product development work proposed for 2019–2020.

### Current Projects

The Children's Education and Care Training Package Products are currently being updated. This update includes the following qualifications and associated Units of Competency:

#### Early Childhood Education and Care

- CHC30113 Certificate III in Early Childhood Education and Care
- CHC50113 Diploma of Early Childhood Education and Care

#### School Age Education and Care

- CHC40113 Certificate IV in School Age Education and Care
- CHC50213 Diploma of School Age Education and Care

#### Education Support

- CHC30213 Certificate III in Education Support
- CHC40213 Certificate IV in Education Support.

## A.4 Consultation Undertaken

A widespread **multi-channel consultation** involving the following stakeholders has been conducted to identify and substantiate the key skills gaps and training needs of the sector, and to determine whether or not there is a need to develop additional Training Package Products:

- All Children's Education and Care Industry Reference Committee (IRC) members representing the following key bodies:
  - KU Children's Services
  - Gowrie Victoria
  - Charles Darwin University
  - TAFE SA
  - Department of Education and Care (NT)
  - Secretariat of National Aboriginal and Islander Child Care (SNAICC) - National Voice for our Children
  - Family Day Care Australia (FDCA)
  - Australian Community Children's Services
  - National Outside School Hours Services Association
  - Australian Childcare Alliance (ACA)
  - Early Childhood Australia
  - Australian Children's Education and Care Quality Authority (ACECQA)
  - United Voice
  - United Services Union.
- Networks of the Children's Education and Care IRC members
- A national online survey (*2019 Future Skills Survey*) was distributed via the SkillsIQ database between November 2018 and January 2019 which sought to identify top skills needs and priority industry issues
- Public consultation on the draft Industry Skills Forecast took place in early 2019, and notifications of this were distributed by email to over 17,000 stakeholders registered in SkillsIQ's database network
- The Industry Skills Forecast, including the Proposed Schedule of Work, was promoted to stakeholders and made available via SkillsIQ's website.

## B. Proposed Schedule of Work

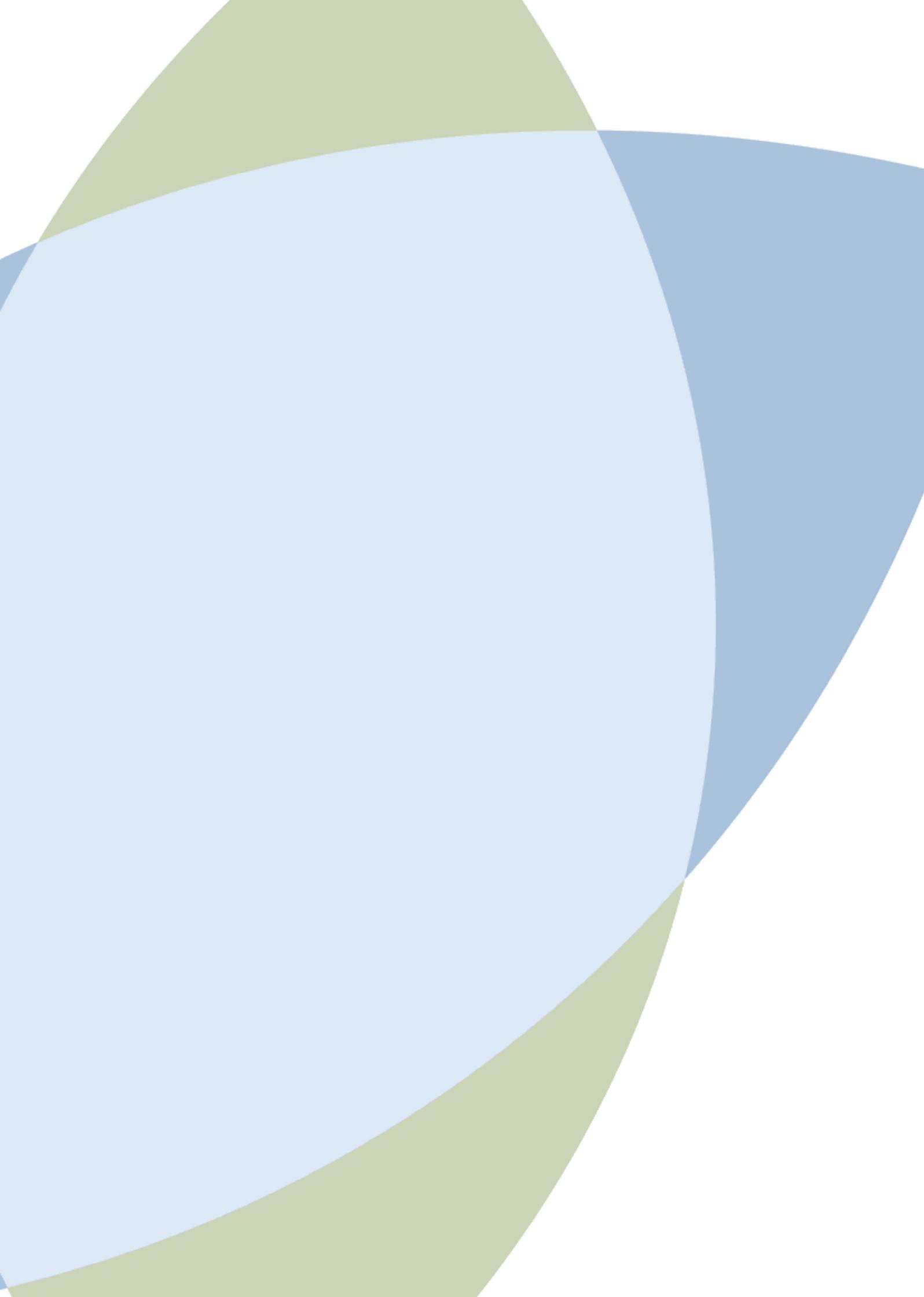
2020–21

YEAR	PROJECT TITLE AND DESCRIPTOR
2020–21	NO NEW PROJECTS ARE PROPOSED

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