



**National Club Survey 2023**  
**Arolwg Clybiau Cenedlaethol 2023**

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# BACKGROUND

Clybiau Plant Cymru Kids' Clubs' vision is a Wales where children play, and communities prosper. Our work is underpinned by our commitment to all children, their families and the communities in Wales, ensuring that they have access to quality Out of School Childcare.

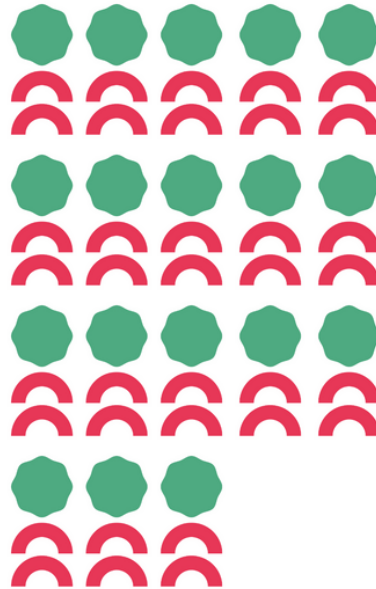
The organisation currently supports 1535 Out of School Childcare Clubs (within 850 individual settings), a key part of Wales' foundational

economy, providing over 46,500 childcare places and an estimated 5,500+ Playworker jobs. Settings enable parents and carers to work, train, progress their careers and improve their families' circumstances, whilst supporting children's rights including their right to play and all the benefits play brings.

We have extensive knowledge of the Out of School Childcare sector, developed over the past 22 years and work closely in partnership with the [Cwlwm](#) consortium, Welsh Government, [Care Inspectorate Wales](#) (CIW), local authorities, [Social Care Wales](#) and other key partners to ensure that the sector is understood, valued and supported to thrive.

To find out more about Clybiau Plant Cymru Kids' Clubs, click [here](#).

December 2023  
Rhagfyr 2023



**Currently:**  
**850 settings**  
**1535 clubs**  
**46,513 Out of School  
 Childcare places**

**Ar hyn o bryd:**  
**850 o leoliadau**  
**1535 clwb**  
**46,513 Lle Gofal Plant  
 Allysgol**

allweddol o economi sylfaenol Cymru, gan ddarparu dros 46,500 o leoedd gofal plant ac amcangyfrif o 5,500+ o swyddi Gweithwyr Chwarae. Mae lleoliadau'n galluogi rhieni a gofawyr i weithio, hyfforddi, datblygu eu gyrfaedd a gwella amgylchiadau eu teuluoedd, tra'n cefnogi hawliau plant, gan gynnwys eu hawl i chwarae a'r holl fanteision a ddaw yn sgil chwarae.

Mae gennym wybodaeth helaeth am y sector Gofal Plant All-ysgol, a ddatblygwyd dros y 22 mlynedd diwethaf ac rydym yn gweithio'n agos mewn partneriaeth â chonsortium [Cwlwm](#), Llywodraeth Cymru, [Arolygiaeth Gofal Cymru](#) (AGC), awdurdodau lleol, [Gofal Cymdeithasol Cymru](#) a phartneriaid allweddol eraill i sicrhau bod y sector yn cael ei ddeall, ei werthfawrogi a'i gefnogi i ffynnu.

I ddarganfod mwy am Clybiau Plant Cymru Kids' Clubs, cliciwch [here](#).

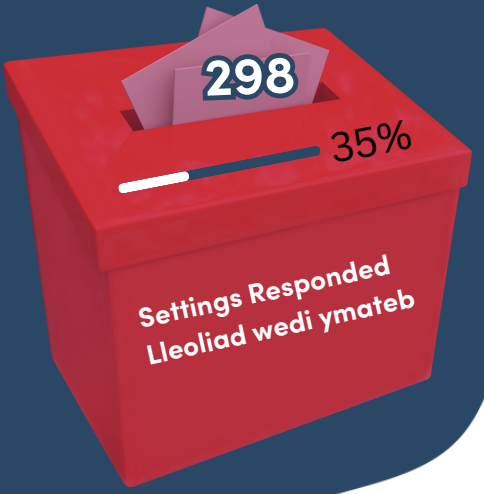
# CEFNDIR

Gweledigaeth Clybiau Plant Cymru Kids' Clubs yw Cymru lle mae plant yn chwarae, a chymunedau'n ffynnu. Mae ein gwaith wedi'i danategu gan ein hymrwymiad i bob plentyn, eu teuluoedd a'r cymunedau yng Nghymru, gan sicrhau bod ganddynt fynediad at Ofal Plant All-ysgol o safon.

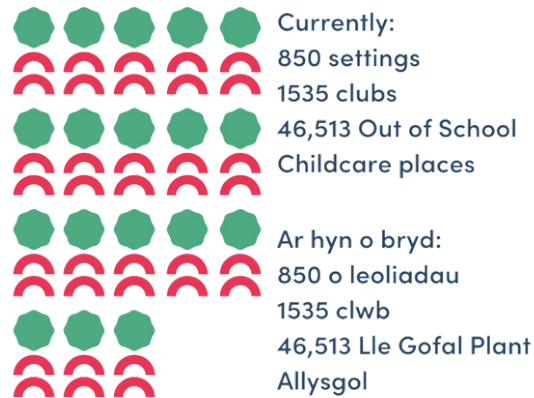
Ar hyn o bryd mae'r sefydliad yn cefnogi 1535 o Glybiau Gofal Plant All-ysgol (o fewn 850 o leoliadau unigol), sy'n rhan

# NATIONAL CLUB SURVEY SUMMARY

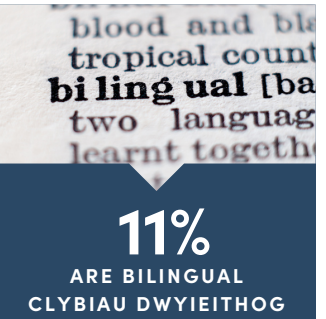
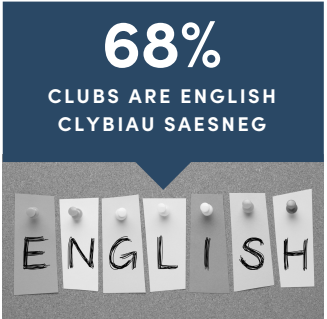
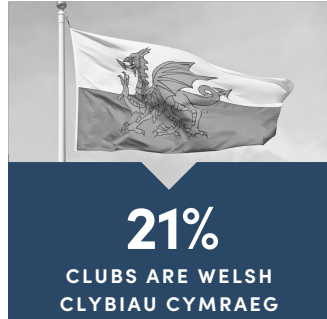
## CRYNODEB O'R AROLWG CLYBIAU CENEDLAETHOL



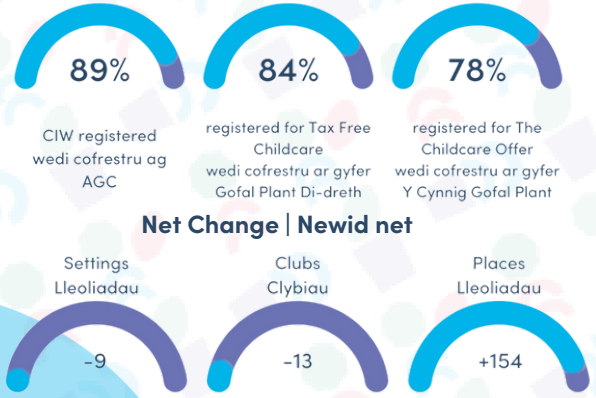
December 2023  
Rhagfyr 2023



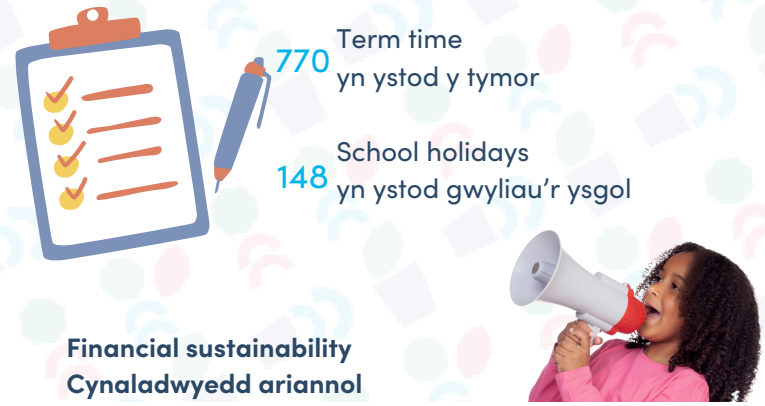
### Increased Welsh language clubs | Cynydd mewn clybiau Cymraeg



### Increased registration | Mwy o gofrestrriad

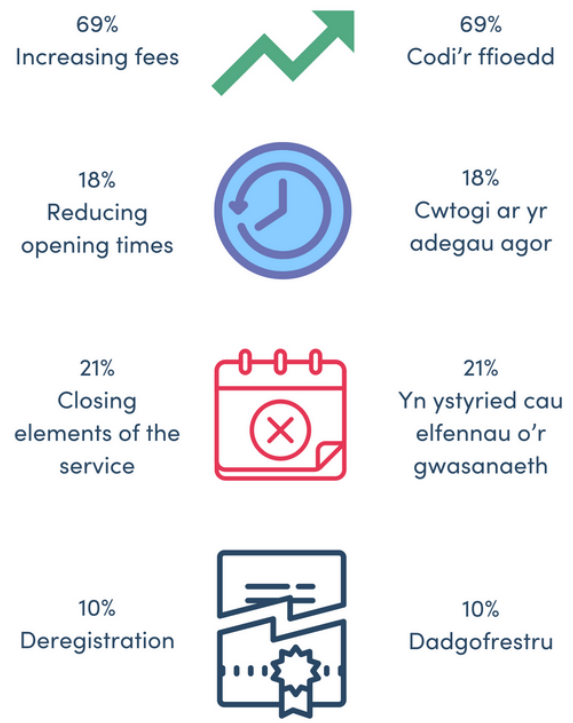


### Children on Waiting Lists | Plant ar restrau aros

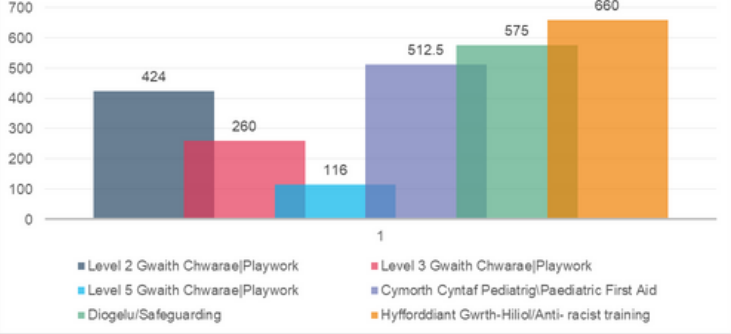


### Longer term impacts | Effeithiau'r tymor hirach

12 months+, considering: Mewn 12 mis+, gan ystyried:



### High qualification/training needs Anghenion am gymwysterau/hyfforddiant uwch





01.

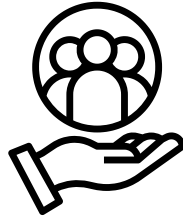


Llywodraeth Cymru  
Welsh Government

Continued commitment from Welsh Government to support the sustainability of the Out of School Childcare Sector with funding that is specifically ringfenced.

Ymrwymiad parhaus gan Lywodraeth Cymru i gefnogi cynladwyedd y Sector Gofal Plant All-Ysgol â chyllid sydd wedi ei glustnodi'n benodol

02.



Tailored and specific business support for clubs from knowledgeable Childcare Business Development Officers..

Cefnogaeth fusnes penodol ac wedi ei theilwra i glybiau gan Swyddogion Datblygu Busnesau Gofal Plant gwybodus

03.



Promote Playworkers' value and continue exploring solutions to the recruitment/retention challenges.

Hyrwyddo gwerth Gweithwyr Chwarae a pharhau i edrych ar atebion i'r heriau recriwtio/chadw.

04.



Continued commitment to funded qualification and training opportunities.

Ymrwymiad parhaus i gyfleoedd cymhwyso a hyfforddi wedi'u cyllido

05.



Promote to parents the value of play and CIW registered Out of School Childcare for their children.

Hyrwyddo i rieni gwerth chwarae a Gofal Plant Allysgol sydd wedi ei gofrestru gydag AGC.

06.



Promote the benefits of registering for Tax-Free Childcare and the Childcare Offer.

Hyrwyddo manteision cofrestru ar gyfer Gofal Plant Di-dreth a'r Cynnig Gofal Plant.

# Recommendations Argymhellion



## EXECUTIVE SUMMARY

Clubs provide an estimated 5,500 local Playworker jobs and enable parents/carers of over 46,000 children to provide for their families, whilst their children benefit from play.

With a 35% response rate, our National Club Survey 2023 is allowing us to provide tailored support to individual clubs, accurately represent the sector and provide key recommendations to decision makers and other key partners.

It is positive to observe higher percentages of clubs registered with Care Inspectorate Wales and for Tax-Free Childcare and The Childcare Offer, and the drive for quality through demand for Professional Development opportunities such as using Welsh and anti-racist practice (whilst the high need for funded qualifications continues). It is also clear that clubs provide play and socialisation opportunities for a high number of children with a variety of wellbeing and support needs.

However, financial sustainability and recruitment and retention remain a significant challenge. Clubs are considering increasing fees, reducing opening times and closing elements of their business. Staff shortages are continuing to undermine the sustainability of settings, their ability to register with CIW and expand their businesses to meet waiting lists. The majority of those leaving posts are leaving the sector; lack of candidates with qualifications is the main challenge when recruiting (56%), followed by lack of applicants generally (55%).

## CRYNODEB GWEITHREDOL

Mae clybiau'n darparu amcangyfrif o 5,500 o swyddi Gweithwyr Chwarae lleol ac yn galluogi rhieni/gofalwyr dros 46,000 o blant i ddarparu ar gyfer eu teuluoedd, tra bydd eu plant yn elwa o chwarae.

Gyda chyfradd ymateb o 35%, mae ein Harolwg Clybiau Cenedlaethol 2023 yn ein galluogi i ddarparu cymorth wedi'i deilwra i glybiau unigol, cynrychioli'r sector yn gywir a rhoi argymhellion allweddol i'r rhai sy'n gwneud penderfyniadau a phartneriaid allweddol eraill.

Mae'n gadarnhaol gweld canrannau uwch o glybiau sydd wedi'u cofrestru ag Arolygiaeth Gofal Cymru ac ar gyfer Gofal Plant Di-dreth a'r Cynnig Gofal Plant a'r ymdrech i sicrhau ansawdd oherwydd y galw am gyfleoedd Datblygiad Proffesiynol megis mewn defnyddio'r Gymraeg ac arferion gwrth-hiliol (tra bod yr angen mawr am gymwysterau wedi'u hariannu yn parhau). Y mae hefyd yn amlwg bod clybiau'n darparu cyfleoedd chwarae a chymdeithasu i nifer fawr o blant sydd ag amrywiaeth o anghenion lles a chymorth.

Fodd bynnag, mae cynaliadwyedd ariannol a recriwtio a chadw yn parhau i fod yn her sylweddol. Mae clybiau'n ystyried cynyddu ffioedd, lleihau oriau agor, a chau elfennau o'u busnes. Mae prinder staff yn dal i danseilio cynaliadwyedd lleoliadau, eu gallu i gofrestru gydag AGC ac i ehangu eu busnesau i fodloni rhestrau aros. Mae mwyafrif y rhai sy'n gadael swyddi yn gadael y sector; diffyg ymgeiswyr â chymwysterau yw'r brif her wrth recriwtio (56%), ac yna diffyg ymgeiswyr yn gyffredinol (55%).

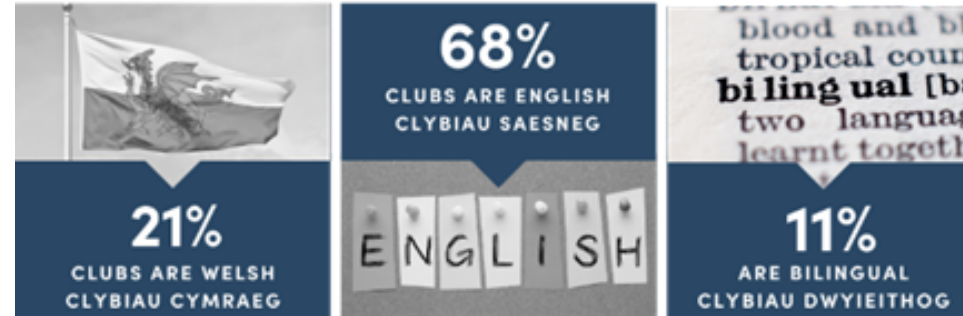


# CLUB SURVEY

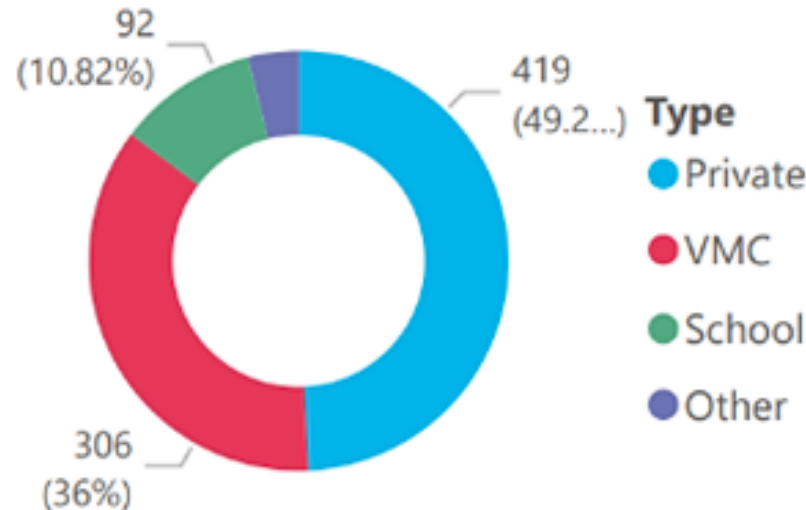
# AROLWG CLYBIAU

Our National Club survey (Autumn 2023) asked all Out of School Childcare Clubs across Wales to respond to a survey to better meet their support needs and enable us to fully represent the sector to policy colleagues and decision makers. The impact of the rising cost of living, including National Minimum Wage and rent, which represent a significant proportion of settings' costs, parents and carers increased home working and the continuing workforce shortages are taking their toll on the Out of School Childcare Sector.

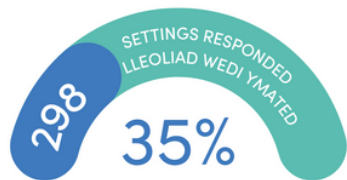
## Clubs by language | Clybiau yn ôl iaith



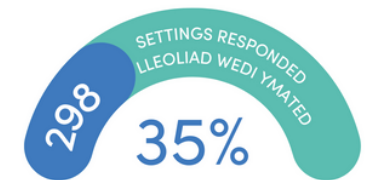
## Clybiau yn ôl Math Clubs by Type



Gofynnodd ein harolwg Clybiau Cenedlaethol (Hydref 2023) i bob Clwb Gofal Plant All-ysgol ledled Cymru ymateb i arolwg i ddiwallu eu hanghenion cymorth yn well a'n galluogi i gynrychioli'r sector yn llawn i gydweithwyr polisi a'r rhai sy'n gwneud penderfyniadau. Mae effaith costau byw cynyddol, gan gynnwys yr Isafswm Cyflog Cenedlaethol a rhent, sy'n cynrychioli cyfran sylweddol o gostau lleoliadau, cynnydd mewn gweithio gartref gan rieni a gofaldwyr a phrinder parhaus y gweithlu, yn effeithio ar y Sector Gofal Plant All-ysgol.



Thank you to the 298 settings that took the time to respond to the survey, representing 35% of the settings across Wales.



Diolch i'r 298 lleoliad sef 35% o'r lleoliadau yng Nghymru gyfan, a roddodd yr amser i ymateb i'r arolwg.

The responses highlighted within this report have already been used to provide tailored action plans and support to individual clubs. They will also help to inform support needed from communities, Clybiau Plant Cymru Kids' Clubs, local authorities and Welsh Government as well as other key partners to support this foundational sector. With worrying statistics relating to the longer term impact on settings, action is needed to ensure that the value that the sector provides for children and their families and the economy across Wales is not lost.

Last year (2022) we recorded an estimated overall net loss of 36 clubs in 14 settings providing 823 places. In the same period this year, there has been a loss of 9 settings/13 clubs. We continue to support new clubs to open.



### Registration

From Figure 2, we can see that the majority of respondents (89%, with another 5% actively working towards registration and 2% requiring support) are offering Care Inspectorate Wales registered services, meeting National Minimum Standards and if registered, enabling families to access financial support. It is encouraging to see that percentages of those registered with Care Inspectorate Wales (CIW) and for Tax Free Childcare (84%) and The Childcare Offer (78%) have all increased since our report last year (87%, 76% and 66% respectively).

Mae'r ymatebion a amlygwyd yn yr adroddiad hwn eisoes wedi'u defnyddio i ddarparu cynlluniau gweithredu wedi'u teilwra a chymorth i glybiau unigol. Byddant hefyd yn helpu i lywio'r cymorth sydd ei angen gan gymunedau, Clybiau Plant Cymru Kids' Clubs, awdurdodau lleol a Llywodraeth Cymru yn ogystal â phartneriaid allweddol eraill, i gefnogi'r sector sylfaenol hwn. Ac ystadegau pryderus yn ymwneud â'r effaith tymor hwy ar leoliadau, mae angen gweithredu i sicrhau nad yw'r gwerth y mae'r sector yn ei roi i blant a'u teuluoedd, a'r economi ledled Cymru, yn cael ei golli.

Y llynedd (2022) fe wnaethom gofnodi amcangyfrif o golled net cyffredinol o 36 clwb mewn 14 lleoliad, yn darparu 823 lle. Yn yr un cyfnod eleni, bu colled o 9 lleoliad/13 clwb. Rydym yn parhau i gefnogi clybiau newydd i agor

Figure 1: Net change in Out of School Childcare Clubs April-December 2023  
Ffigure 1: Newid net mewn Clybiau Gofal Plant All-Ysgol 2023

### Cofrestrïadau

O Ffigur 2, gallwn weld bod mwyafrif yr ymatebwyr (89%, gyda 5% arall wrthi'n gweithio tuag at gofrestru a 2% angen cymorth) yn cynnig gwasanaethau sy'n gofrestredig ag Arolygiaeth Gofal Cymru, yn bodloni'r Safonau Gofynnol Cenedlaethol ac, os ydynt wedi cofrestru, yn galluogi teuluoedd i gael mynediad at cymorth ariannol. Mae'n galonogol gweld bod canrannau'r rhai sydd wedi cofrestru ag Arolygiaeth Gofal Cymru (AGC), Gofal Plant Di-dreth (84%) a'r Cynnig Gofal Plant (78%) oll wedi cynyddu ers ein hadroddiad y llynedd (87%, 76% a 66% yn y drefn honno).



With the rising cost of living, we know families struggle to pay for childcare (and that clubs struggle to pay rent, wages which match the level of responsibility, food and other resources). Supporting our clubs to register with CIW and with funding support initiatives such as Tax Free Childcare and The Childcare Offer is a key strategic priority for us and it makes childcare more accessible and affordable.

For the sustainability of childcare businesses and to support families, we urge providers to ensure they understand and promote the support available to parents/carers, including Universal Credits, where families on low income could receive up to 85% of their childcare costs. It is imperative to approach new and existing families who are not using TFC and other initiatives and explain the benefits and how to apply. The schemes must be promoted on providers' website/social media/around settings and include useful links such as

- [Tax-Free Childcare - GOV.UK \(www.gov.uk\)](https://www.gov.uk)
- [Check what help you could get with childcare costs - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

Gyda chostau byw cynyddol, rydym yn gwybod bod teuluoedd yn ei chael hi'n anodd talu am ofal plant (a bod clybiau'n cael trafferth talu rhent, cyflogau sy'n cyfateb i lefel cyfrifoldeb, bwyd ac adnoddau eraill). Mae cefnogi ein clybiau i gofrestru ag AGC, ynghyd â chyda mentrau cymorth-ariannol fel Gofal Plant Di-dreth a'r Cynnig Gofal Plant, yn flaenoriaeth strategol allweddol i ni ac mae'n gwneud gofal plant yn fwy hygyrch a fforddiadwy.

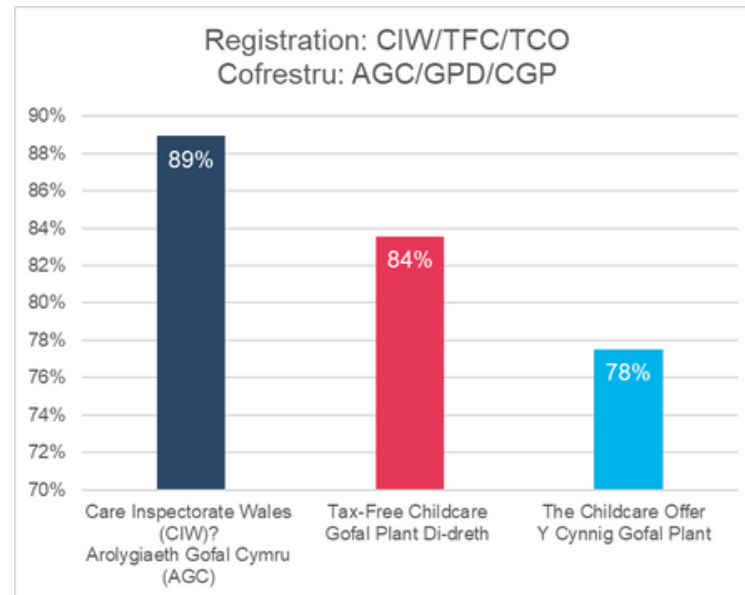


Figure 2: Registration status/Funded Childcare: Care Inspectorate Wales (CIW), Tax-Free Childcare (TFC), The Childcare Offer (TCO)

Ffigur 2: Statws cofrestru/Gofal Plant a Gyllidir: Arolygiaeth Gofal Cymru (AGC), Gofal Plant Di-dreth, Y Cynnig Gofal Plant

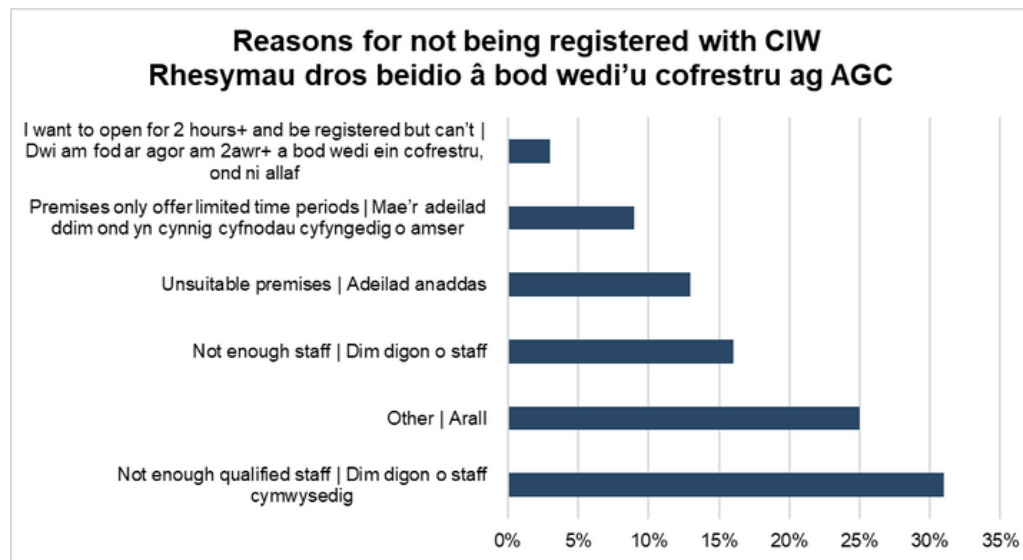
Far gyfer cynaliadwyedd eich busnesau gofal plant, ac i gefnogi teuluoedd, rydym yn annog darparwyr i wneud yn sicr eu bod yn deall ac yn hyrwyddo'r cymorth sydd ar gael i rieni/gofalwyr, gan gynnwys Credydau Cynhwysol, lle gallai teuluoedd ar incwm isel dderbyn hyd at 85% o'u costau gofal plant. Y mae'n hollbwysig cysylltu â theuluoedd presennol a newydd nad ydynt yn defnyddio Gofal Plant Di-dreth a mentrau eraill, esbonio'r manteision a sut i wneud cais. Rhaid i'r cynlluniau gael eu hyrwyddo ar wefannau/cyfryngau cymdeithasol, ac o amgylch lleoliadau'r darparwyr, a chynnwys dolenni defnyddiol megis

- [Gofal Plant Di-dreth - GOV.UK \(www.gov.uk\)](https://www.gov.uk)
- [Gwiriwch pa help y gallwch ei gael gyda'ch costau gofal plant - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

Figure 3 shows the reasons for not being registered with Care Inspectorate Wales, mainly due to insufficient qualified staff (31%).

It is imperative that settings and individuals seize the fully funded qualification opportunities presented by the Training and Support Programme (register [here](#)) and it is evident that the availability of funded qualifications will need to continue to mitigate these barriers. 25% quoted other reasons for not being registered, not enough staff – recruitment issues (16%), unsuitable premises (13%), premises only offer limited time periods (9%), want to open for 2 hours+ and be registered but can't (3%).

Figure 3: Reasons for not being registered with CIW  
Ffigur 3: Rhesymau dros beidio â bod wedi'u cofrestru ag AGC



Other reasons included (25%):

- I need to correspond with the parents to set up a parents' committee to enable the club to work towards registering with CIW.
- In process of registration (new setting)
- Struggling financially- worried they will apply and then need to close
- Have started the process
- Awaiting registration
- Club only offers care between 3.30-5.29 at present

Mae Ffigur 3 yn dangos y rhesymau dros beidio â chofrestru gydag Arolygiaeth Gofal Cymru, yn bennaf oherwydd diffyg staff cymwys (31%).

Mae'n hanfodol bod lleoliadau ac unigolion yn manteisio ar y cyfleoedd cymhwyster a ariennir yn llawn a gyflwynir gan y Rhaglen Hyfforddiant a Chymorth (cofrestrwch [yma](#)) ac mae'n amlwg y bydd angen i argaeledd cymwysterau wedi'u hariannu barhau i liniaru'r rhwystrau hyn. Dyfynnodd 25% resymau eraill dros beidio â chofrestru, dim digon o staff – materion recriwtio (16%), eiddo anaddas (13%), safleoedd yn cynnig cyfnodau amser cyfyngedig yn unig (9%), eisiau agor am 2 awr+ a bod yn gofrestredig ond yn methu â gwneud hynny. (3%).

Ymhlith y rhesymau eraill (25%) yr oedd:

- Mae angen i mi ohebu â'r rheini i sefydlu pwyllgor rhieni er mwyn galluogi'r clwb i weithio tuag at gofrestru ag AGC.
- Yn y broses o gofrestru (lleoliad newydd)
- Yn ei chael yn anodd yn ariannol, yn ofni y byddant yn gwneud cais i gofrestru ac yna'n gorfod cau
- Wedi dechrau'r broses
- Yn aros i gofrestru
- Y clwb ddim ond yn cynnig gofal rhwng 3.30 a 5.29 ar hyn o bryd.



## Occupancy

Our previous surveys reported that a significant percentage of clubs reported a decrease in attendance since March 2020. With some time passed since the Pandemic, we felt it more useful to measure occupancy compared to the number of places on offer: 79% term time and 73% during school holidays.

## Cyfradd Llenwi

Adroddodd ein harolygon blaenorol nododd ein harolygon blaenorol fod canran sylweddol o glybiau wedi nodi gostyngiad mewn presenoldeb ers mis Mawrth 2020. Gyda pheth amser wedi mynd heibio ers y Pandemig, roeddem yn teimlo ei bod yn fwy defnyddiol mesur y lleoedd a oedd yn cael eu llenwi o'u cymharu â'r nifer a oedd ar gynnig: 79% yn ystod y tymor a 73% yn ystod gwyliau ysgol.

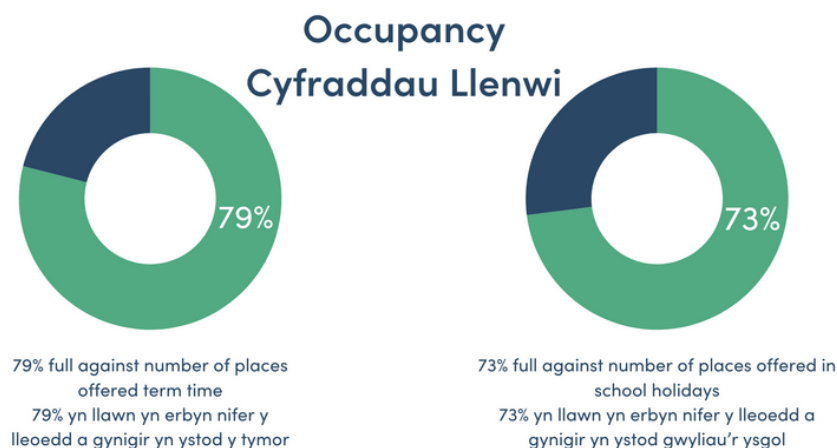


Figure 4: Average occupancy rates (term time and holiday time)  
Ffigur 4: Cyfraddau llenwi ar gyfartaledd (yn ystod y tymor a'r gwyliau)

At best this is likely to impact reserves, ability to purchase new equipment and resources, ability to offer staff any pay increase and potentially a need to increase fees, impacting affordability for parents/carers.

Ar y gorau mae hyn yn debygol o effeithio ar gronfeydd wrth gefn, y gallu i brynu offer ac adnoddau newydd, y gallu i gynnig unrhyw godiad cyflog i staff ac o bosibl yr angen i gynyddu ffioedd, gan effeithio ar fforddiadwyedd i rieni/gofalwyr.

### Recruitment and Retention

Respondents had waiting lists for 918 children (770 term time and 148 during school holidays). More staff, more qualified staff and funding would enable settings to expand in the majority of cases.

During term time, more staff would enable 62% of settings to expand, followed by more staff with qualifications (27%), funding to support expansion (24%) and finally more space (19%).

### Recriwtio a Chadw Staff

Roedd gan ymatebwyr restrau aros ar gyfer 918 o blant (770 yn ystod y tymor a 148 yn ystod gwyliau ysgol). Byddai mwy o staff, mwy o staff cymwys a chyllid yn galluogi lleoliadau i ehangu yn y mwyafrif o achosion.

Yn ystod y tymor, byddai mwy o staff yn galluogi 62% o leoliadau i ehangu, ac yna mwy o staff â chymwysterau (27%), cyllid i gefnogi ehangu (24%) ac yn olaf mwy o le (19%).

### Children on Waiting Lists | Plant ar restrau aros

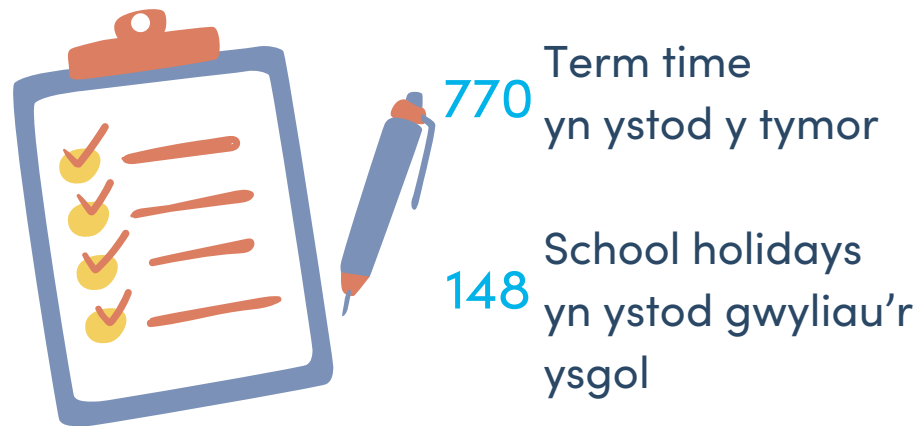


Figure 5: Waiting lists (term time and holiday time)

Ffigur 5: Rhestrau Aross (yn ystod y tymor a'r gwyliau)

During school holidays, more staff would enable 59% of settings to expand, followed by more staff with qualifications (29%), funding to support expansion (27%) and finally more space (2%).

Yn ystod gwyliau ysgol, byddai mwy o staff yn galluogi 59% o leoliadau i ehangu, ac yna mwy o staff gyda chymwysterau (29%), cyllid i gefnogi ehangu (27%) ac yn olaf mwy o le (2%).

The recruitment and retention challenges clearly continue. Of 298 respondents, 593 staff members had left positions in their settings over the last 12 months. National Minimum Wage has increased year on year and there are other cost of living increases (increased rent being more and more frequently charged, increased food bills and utilities, pension contributions) that mean that clubs are rarely able to offer pay that reflects the responsibility and professional nature of the Playworker role. Most Playworkers are on Minimum Wage, with an increasing amount of responsibility as legislation changes and expectations on the sector increase.

Staff are seeking alternative employment as they leave for other jobs outside the sector (52%). 34% of staff had left for another job inside the sector, 31% quoted other reasons, with longer hours better pay often quoted.

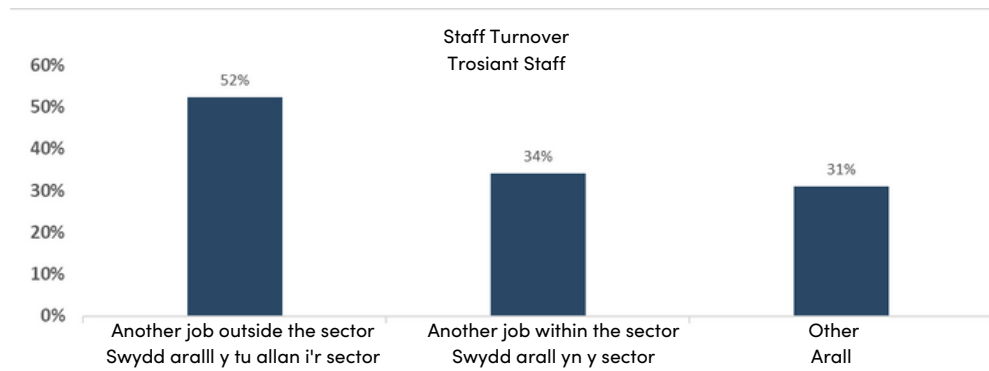


Figure 6: Staff Turnover  
Ffigur 6: Trosiant Staff

#### Heriau wrth recriwtio/Challenges when recruiting

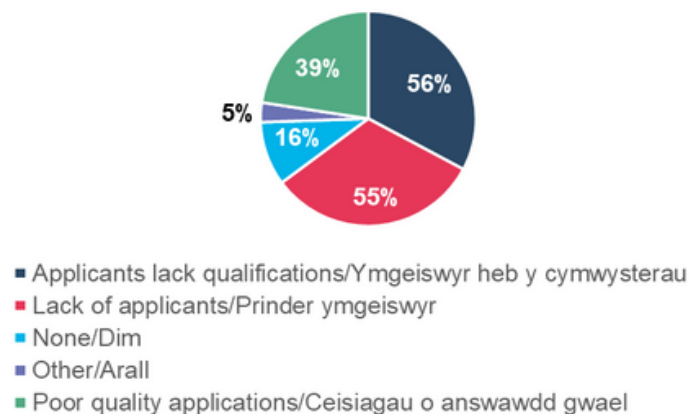


Figure 7: Challenges when recruiting  
Ffigur 7: Heriau wrth recriwtio

Mae'n gllir bod yr heriau recriwtio yn parhau. O'r 298 o ymatebwyr, roedd 593 o aelodau staff wedi gadael swyddi yn eu lleoliadau dros y 12 mis diwethaf. Mae'r Isafswm Cyflog Cenedlaethol wedi codi flwyddyn ar ôl blwyddyn ac mae codiadau costau byw eraill (mae rhent uwch yn cael ei godi'n amlach, biliau bwyd a chyfleustodau uwch, cyfraniadau pensiwn) sy'n golygu mai anaml y gall clybiau gynnig y tâl hwnnw yn adlewyrchu cyfrifoldeb a natur broffesiynol rôl y Gweithiwr Chwarae. Mae'r rhan fwyaf o Weithwyr Chwarae ar Isafswm Cyflog, a mwy a mwy o gyfrifoldeb wrth i ddeddfwriaeth newid a disgwyliadau ar y sector gynyddu.

Mae staff yn chwilio am waith arall wrth iddynt adael am swyddi eraill y tu allan i'r sector (52%). Roedd 34% o'r staff wedi gadael am swydd arall o fewn y sector, roedd 31% wedi dyfynnu rhesymau eraill – oriau hirach a thâl gwell yn aml.

Figure 7 shows that applicants lacking qualifications is the main challenge encountered by settings when recruiting (56%), followed closely by lack of applicants (55%) and poor quality applications (39%).

Settings have had most success recruiting on facebook (47%), followed by other job posting sites: Indeed/Total Jobs (40%), local school staff (28%), local posters (16%), local secondary students (8%), Clybiau Plant Cymru Kids' Clubs website (4%), Twitter (3%) and LinkedIn (1%).

### Qualifications and training needs

Within 35% of all Out of School Childcare Clubs (298) who responded to the survey, the following training and qualifications were required.

There is a high need for qualifications (800 staff members) and training (1088) and professional development (660) to keep improving practice for example to support using Welsh and diversity, and we are pleased to have accessed funding to meet these demands.

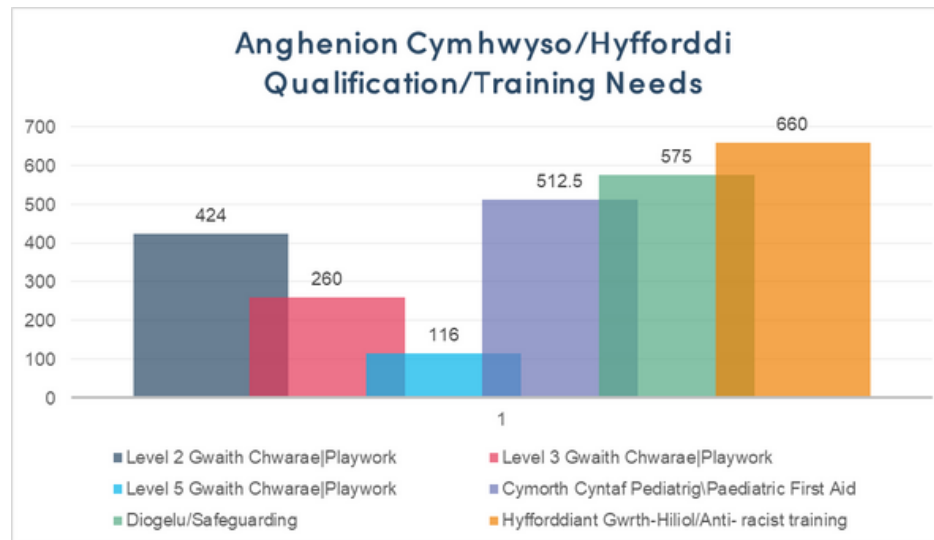


Figure 8: Qualifications and training needs  
Ffigur 8: Anghenion cymwysterau a hyfforddiant

Mae Ffigur x yn dangos mai ymgeiswyr heb gymwysterau yw'r brif her a wynebir gan leoliadau wrth recriwtio (56%), gyda diffyg ymgeiswyr yn dilyn yn agos (55%) a cheisiadau o ansawdd gwael (39%).

Mae lleoliadau wedi cael y llwyddiant mwyaf wrth recriwtio ar facebook (47%), ac yna safleoedd postio swyddi eraill: Yn wir/Cyfanswm Swyddi (40%), staff ysgolion lleol (28%), posteri lleol (16%), myfyrwyr uwchradd lleol (8%), gwefan Clybiau Plant Cymru Kids' Clubs (4%), Twitter (3%) a LinkedIn (1%).

### Anghenion cymwysterau a hyfforddiant

fewn 35% o'r holl leoliadau Gofal Plant All-ysgol a ymatebodd i'r arolwg, roedd angen yr hyfforddiant a'r cymwysterau canlynol.

Mae angen mawr am gymwysterau (800 o aelodau staff), hyfforddiant ((1088) a datblygiad proffesiynol (660) i dso dal i wella arferion, er enghraifft, cefnogi gan ddefnyddio Cymaeg ac amrywedd, ac rydym yn falch ein bod wedi gallu cael gafael ar gyllid i ateb y galwadau hyn.



### Children's support/wellbeing needs

Respondents had 1249 children with additional needs in their settings. 256 settings (86%) reported children's support/wellbeing needs and figure 9 shows that of those respondents expressing a support need, difficulty managing emotions was the most common need (66%), followed by speech and language challenges (60%), low self-confidence/esteem (47%), anxiety or low mood (45%), difficulty making new friends/other social skills (41%), poor independence (36%), increasing levels of neurodiversity (35%), poor physical fitness (16%). Other conditions included mutism, aggression, behaviour, ADHD, Autism, non-verbal, severe cognitive conditions.

*"There is not enough money available to support the wellbeing needs of the children, the impact of Covid has been massive on the children and is still obvious. More money is needed to provide free place spaces for children who are struggling with their physical and wellbeing abilities."*

There needs to be greater awareness of the benefits of play for children. Spontaneous play, recreation and creativity has a multitude of benefits for children including their psychological, social and cognitive development and positive impact on mental health and wellbeing. Out of School Childcare settings are able to create and actively encourage the time and space for children to engage in spontaneous play.

### Anghenion cefnogaeth/llesiant plant

Roedd gan yr ymatebwyr 1249 o blant ag anghenion ychwanegol yn eu lleoliadau. Adroddodd 256 o leoliadau (86%) ar anghenion cymorth/lles plant ac mae ffigur x yn dangos o'r ymatebwyr hynny a fynegodd angen cymorth, mai anhawster rheoli emosiynau oedd yr angen mwyaf cyffredin (66%), ac yna heriau lleferydd ac iaith (60%), isel hunanhyder/barch (47%), pryder neu hwyliau isel (45%), anhawster gwneud ffrindiau newydd/sgiliau cymdeithasol eraill (41%), annibyniaeth wael (36%), lefelau cynyddol o niwroamrywiaeth (35%) a lefel isel o ffitrwydd corfforol (16%). Roedd cyflyrau eraill yn cynnwys mudandod, ymddygiad ymosodol, ymddygiad, ADHD, Awtistiaeth, cyflyrau di-eiriau, cyflyrau gwybyddol difrifol.

*"Nid oes digon o arian ar gael i gefnogi anghenion lles y plant, mae effaith Covid wedi bod yn enfawr ar y plant ac yn dal yn amlwg. Mae angen mwy o arian i ddarparu lleoedd am ddim i blant sy'n cael trafferth gyda'u galluoedd corfforol a lles."*

Mae angen mwy o ymwybyddiaeth o fanteision chwarae i blant. Mae chwarae digymell, hamdden a chreadigedd yn dod â lluo o fanteision i blant gan gynnwys eu datblygiad seicolegol, cymdeithasol a gwybyddol, ac effaith gadarnhaol ar iechyd meddwl a lles. Mae lleoliadau Gofal Plant All-ysgol yn gallu creu ac annog yn weithredol yr amser a'r lle i blant gymryd rhan mewn chwarae digymell.

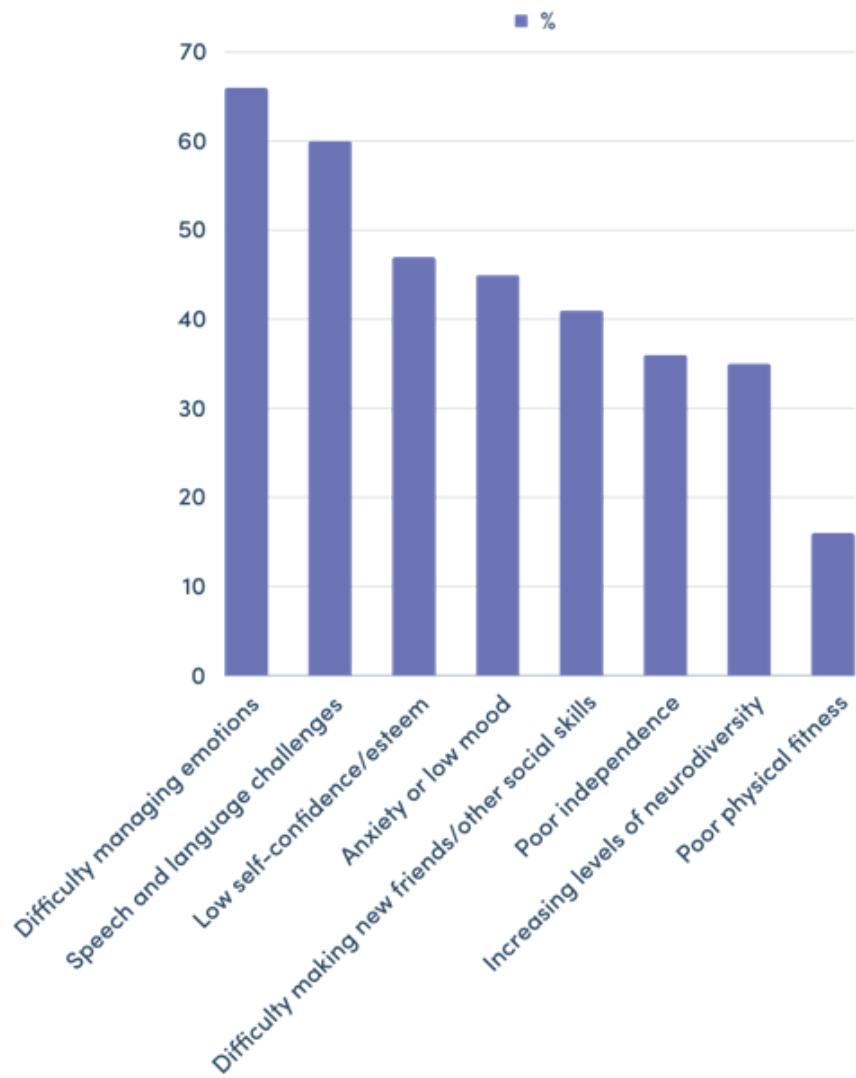
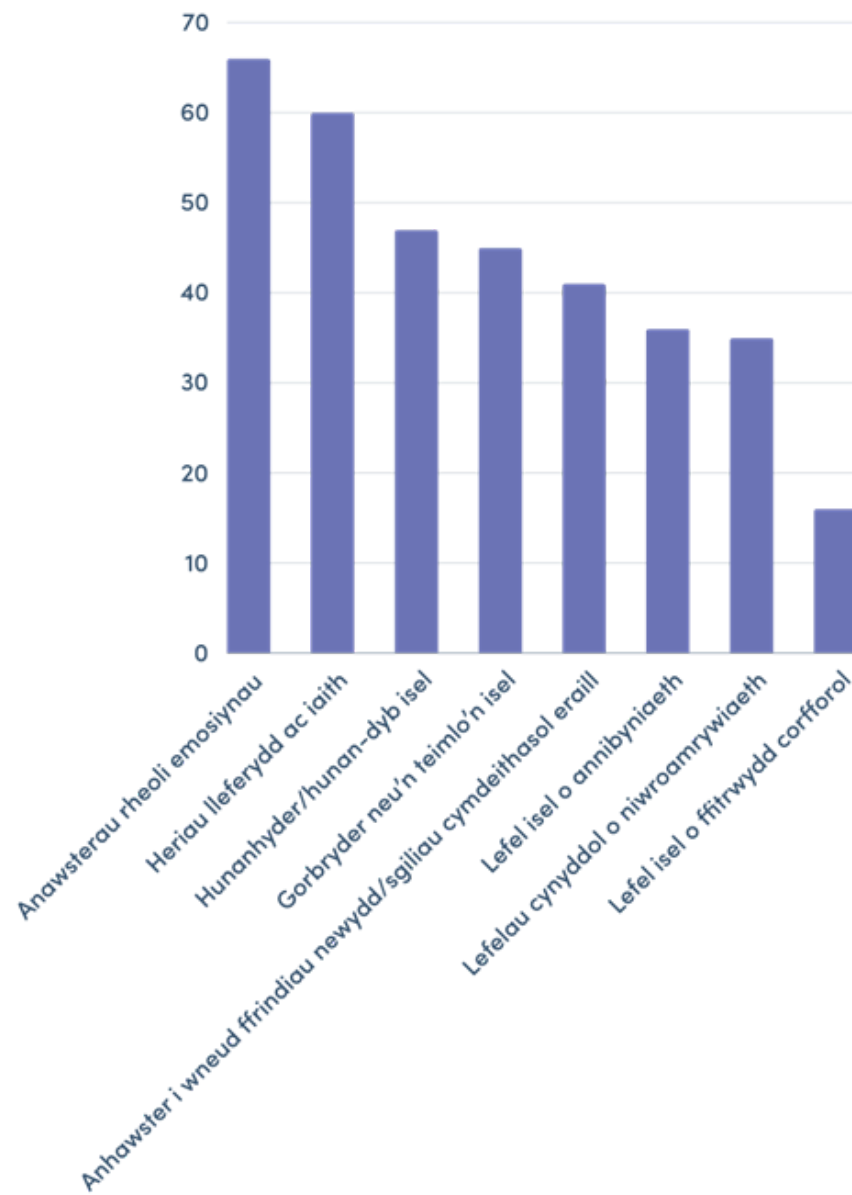


Figure 9: Children's support/wellbeing needs

Ffigur 9: Anghenion cefnogaeth/llesiant plant



## Welsh language and culture

Settings are showing a strong commitment to Professional Development and improving accessibility of their settings. The percentages of English (65%), Welsh (23%) and bilingual (12%) respondents closely mirror those across the whole of Wales. 28% are enhancing their use of Welsh with 22% planning to do so over the next year. 33% currently offer the Active Offer and 89% plan to over the next 12 months. 10% offer the Welsh Language Commissioner's Cynnig Cymraeg (meeting Welsh language requirements and have a strong plan to follow, maintain, and develop Welsh language services) and a further 8% plan to over the next 12 months.

*"We have recently signed up to the Welsh Promise and look forward to working with Clybiau Plant Cymru Kids' Clubs to improve our Welsh usage within our setting."*

A total of 525 staff had undertaken anti-racist practice training, with a further 660 planning to over the next year. 94% considered anti-racism in their policies and 94% celebrated diversity through play. 76% said that they shared job adverts with community groups and 39% had some staff from diverse backgrounds/global majorities and 75% engaged with the wider community to promote their childcare services and diversity through activities.



## Y Gymraeg a diwylliant Cymru

Mae lleoliadau yn dangos ymrwymiad cryf i Ddatblygiad Proffesiynol a gwella hygyrchedd eu lleoliadau. Mae canrannau yr ymatebwyr Saesneg (65%), Cymraeg (23%) a dwyieithog (12%) yn debyg iawn i'r rhai ar draws Cymru gyfan. Mae 28% yn ehangu eu defnydd o'r Gymraeg, a 22% yn bwriadu gwneud hynny dros y flwyddyn nesaf. Mae 33% yn cynnig y Cynnig Rhagweithiol ar hyn o bryd ac mae 89% yn bwriadu gwneud hynny dros y 12 mis nesaf. Mae 10% yn cynnig 'Cynnig Cymraeg' Comisiynydd y Gymraeg (sy'n cwrdd â gofynion y Gymraeg ac sydd â chynllun cryf i ddilyn, gan gynnal, a datblygu gwasanaethau Cymraeg) ac mae 8% arall yn bwriadu gwneud hynny dros y 12 mis nesaf.

*"Rydym wedi ymuno â'r Addewid Cymraeg yn ddiweddar ac yn edrych ymlaen at weithio gyda Clybiau Plant Cymru Kids' Clubs i wella ein defnydd o'r Gymraeg yn ein lleoliad."*

Roedd cyfanswm o 525 o staff wedi dilyn hyfforddiant mewn arferion gwrth-hiliol, a 660 arall yn bwriadu gwneud hynny dros y flwyddyn nesaf. Roedd 94% yn cynnwys gwrth-hiliaeth yn eu polisiâu a 94% yn dathlu amrywedd trwy chwarae. Dywedodd 76% eu bod yn rhannu hysbysebion swyddi gyda grwpiau cymunedol ac roedd gan 39% rai staff o gefndiroedd amryweddol/mwyafrif byd-eang a 75% yn ymgysylltu â'r gymuned ehangach i hyrwyddo eu gwasanaethau gofal plant ac amrywedd trwy weithgareddau.

## Financial sustainability

As part of the foundational economy, Wales needs childcare. Clubs provide an estimated 5,500 local Playworker jobs and over 46,000 childcare places allowing those parents and carers to provide for their families. The net number of settings and clubs is still decreasing and continued impact on the sector is a significant concern.

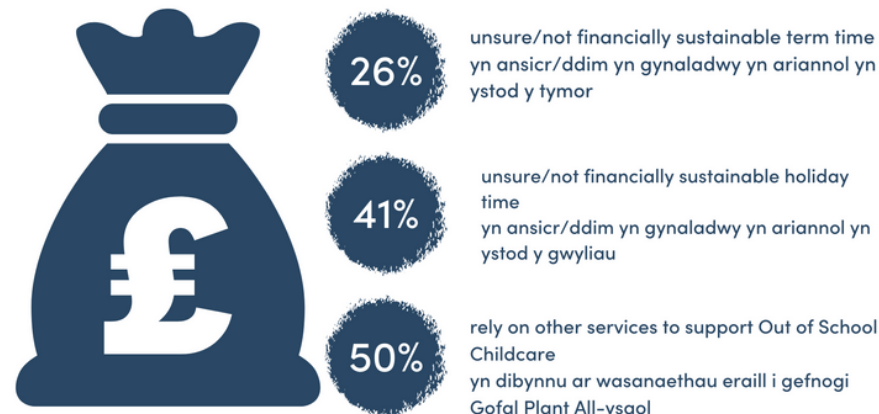
Staff recruitment and retention continues to pose a significant challenge to the sector impacting sustainability, the ability to register with CIW and meet waiting lists.

*“The biggest threat to sustainability is not financial but staffing. The lack of surplus qualified staff means we cannot recruit staff who are already qualified particular at level 3 which is coursing a barrier to sustainably and expansion within our business.”*

*“Could you create a Fair rent policy. [rent] has doubled in price.”*

Figure 10 indicates that a high proportion of holiday clubs in particular are not financially sustainable (41%) and 50% of settings rely on other services they provide such as full daycare and wrap around care to financially support their Out of School Childcare Club. Holiday Clubs have high rent and staffing costs to meet over a short period of time and compete with unregulated children’s activities that fall within the exceptions order. We urge settings to promote their CIW registration status and it’s benefits to parents such as quality, affordability, greater flexibility, strict adult:child ratios, suitably checked, trained and qualified staff and comprehensive policies to safeguard children.

Figure 10: Financial sustainability || Ffigur 10: Cynaliadwyedd ariannol



## Cynaliadwyedd ariannol

Fel rhan o'r economi sylfaenol, mae angen gofal plant ar Gymru. Mae clybiau'n darparu amcangyfrif o 5,500 o swyddi Gweithwyr Chwarae lleol a thros 46,000 o leoedd gofal plant gan alluogi'r rhieni a'r gofalwyr hynny i ddarparu ar gyfer eu teuluoedd. Mae nifer net y lleoliadau a chlybiau yn dal i ostwng ac mae'r effaith barhaus ar y sector yn bryder sylweddol.

Mae recriwtio a chadw staff yn parhau i fod yn her sylweddol i'r sector gan effeithio ar gynaliadwyedd, y gallu i gofrestru gydag AGC a bodloni rhestrau aros.

*“Nid bygythiad ariannol yw'r bygythiad mwyaf i gynaliadwyedd ond staffio. Mae'r diffyg staff cymwys dros ben yn golygu na allwn recriwtio staff sydd eisoes wedi cymhwyso'n benodol ar lefel 3, sy'n arwain at rwystr i gynaliadwyedd ac ehangu o fewn ein busnes.”*

*“Allech chi greu polisi rhent teg. Mae [rhent] wedi dyblu yn ei bris.”*

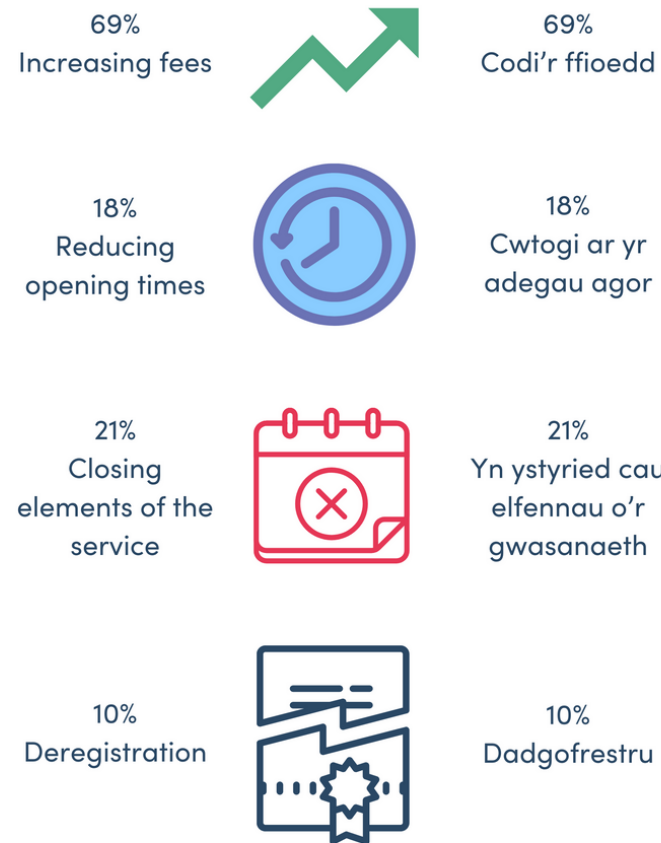
Mae Ffigur 10 yn dangos bod cyfran uchel o glybiau gwyliau yn arbennig nad ydynt yn gynaliadwy yn ariannol (41%) ac mae 50% o leoliadau yn dibynnu ar wasanaethau eraill y maent yn eu darparu megis gofal dydd llawn a gofal cofleidol i gefnogi'n ariannol eu Clwb Gofal Plant All-Ysgol. Mae gan Glybiau Gwyliau gostau rhent a staffio uchel i'w talu dros gyfnod byr o amser ac maent yn cystadlu â gweithgareddau plant heb eu rheoleiddio sy'n dod o fewn y gorchymyn eithriadau. Rydym yn annog lleoliadau i hyrwyddo eu statws, i fod yn gofrestredig ag AGC a'i fanteision i rieni, megis ansawdd, fforddiadwyedd, mwy o hyblygrwydd, cymarebau llym oedolyn:plentyn, staff sydd wedi'u gwirio, eu hyfforddi a'u cymhwyso'n briodol a pholisïau cynhwysfawr i ddiogelu plant.



Figure 11 | Ffigur 11

## Longer term impacts | Effeithiau'r tymor hirach

In 12 months+, considering: Mewn 12 mis+, gan ystyried:



With staff and other costs rising, now more than ever, it's important for settings to limit financial liability: 57% are incorporated to limit financial liability with a further 22% working towards or wanting further information. Our Childcare Business Development Officers can help settings review management structure and support incorporation to protect voluntary management committees in particular.

In addition, the cost of living increases, rent hikes and staffing shortages are increasingly leading clubs to consider increasing fees (69%), closing elements of the service (21%), reducing opening times (18%), and deregistration (10%). This is a significant hike compared to the survey report last year where 59% were considering increasing fees, 9% closing elements of their service and 12% anticipated reduced opening times.

*"We need to increase our fees to cater for the increase in the minimum wage. This will happen within 6 months but not 'only' within 6 months - it will be ongoing."*

Gyda chostau staff a chostau eraill yn cynyddu, yn awr yn fwy nag erioed, mae'n bwysig i leoliadau gyfyngu ar eu hatebolrwydd ariannol: mae 57% wedi'u hymgorffori i gyfyngu ar atebolrwydd ariannol a 22% arall yn gweithio tuag at hynny neu am wybodaeth bellach. Gall ein Swyddogion Datblygu Busnesau Gofal Plant helpu lleoliadau i adolygu strwythurau rheoli a chefnogi ymgorffori i ddioglu pwyllgorau rheoli gwirfoddol yn arbennig.

Yn ogystal, mae cynnydd mewn costau byw, codiadau rhent a phrinder staff yn arwain yn gynyddol at glybiau'n ystyried codi ffioedd (69%), cau elfennau o'r gwasanaeth (21%), lleihau oriau agor (18%), a dadgofrestru (10%). Mae hyn yn gynydd sylweddol o'i gymharu ag adroddiad arolwg y llynedd lle'r oedd 59% yn ystyried cynyddu ffioedd, 9% yn cau elfennau o'u gwasanaeth a 12% yn rhagweld llai o oriau agor.

*"Mae angen i ni gynyddu ein ffioedd i ddarparu ar gyfer y cynnydd yn yr isafswm cyflog. Bydd hyn yn digwydd o fewn 6 mis ond nid 'yn unig' o fewn 6 mis - bydd yn parhau."*

Our recommendations remain largely the same as the cost of living challenges prevail. Tailored and specific business support, access to funded qualifications and training to support quality and accessibility, for example in using the Welsh language, diversity, children with support needs, safeguarding, first aid on an ongoing basis, suitable funding and communities that understand the benefits of play and that utilise and recognise the value of quality, regulated (through Care Inspectorate Wales) childcare will be essential to ensure well managed, quality and sustainable childcare provision prevails. Indeed, recognition of the value of Out of School Childcare and the Playworker role to children, families, the economy and society in general needs to happen at all levels. The data and findings presented above highlight the need for:

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01. Continued commitment from Welsh Government to support the sustainability of the childcare sector for example through appropriate and accessible funding opportunities specifically designated within the Children and Communities Grant for the Out of School Childcare Sector, to support essential costs to be covered whilst fees remain as low as possible.. Also ensuring that new/existing initiatives do not impact the sustainability of regulated childcare and involving these providers in new initiatives from the outset.

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02. The Out of School Childcare Sector needs tailored and specific business support from knowledgeable Childcare Business Development Officers across Wales to address challenges: funding, cashflow forecast, marketing, governance, marketing, staff recruitment/retention.



Mae ein hargymhellion yn parhau i fod yr un fath i raddau helaeth ag y mae heriau costau byw yn drech. Cymorth busnes wedi'i deilwra a phenodol, mynediad at gymwysterau a hyfforddiant a ariennir i gefnogi ansawdd a hygyrchedd, er enghraifft wrth ddefnyddio'r Gymraeg, amrywiaeth, plant ag anghenion cymorth, diogelu, cymorth cyntaf yn barhaus, cyllid addas a chymunedau sy'n deall y Bydd buddion chwarae ac sy'n defnyddio ac yn cydnabod gwerth gofal plant o safon, wedi'i reoleiddio (drwy Arolygiaeth Gofal Cymru) yn hanfodol i sicrhau bod darpariaeth gofal plant gynaliadwy o ansawdd wedi'i rheoli'n dda yn bodoli. Yn wir, mae angen cydnabod gwerth Gofal Plant All-ysgol a rôl Gweithiwr Chwarae i blant, teuluoedd, yr economi a chymdeithas yn gyffredinol ar bob lefel. Mae'r data a'r canfyddiadau a gyflwynir uchod yn amlygu'r angen am:

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01. Parhad ymrwymiad Llywodraeth Cymru i gefnogi cynaliadwyedd y sector gofal plant, er enghraifft trwy gyfleoedd ariannu priodol a hygyrch, wedi eu dynodi'n benodol yn y Grant Plant a Chymunedau ar gyfer y Sector Gofal Plant All-Ysgol, i gynorthwyo gyda thalu costau hanfodol tra cedwir ffioedd mor isel â phosibl. Sicrhau hefyd nad yw mentrau newydd/presennol yn effeithio ar gynaliadwyedd gofal plant a reoleiddir a chynnwys y darparwyr hyn mewn mentrau newydd o'r cychwyn cyntaf.

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02. Cymorth busnes penodol a theilwredig i glybiau ledled Cymru i fynd i'r afael â heriau: cyllid, rhagolwg llif arian, marchnata, llywodraethu, marchnata, recriwtio/cadw staff.

# RECOMMENDATIONS

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03. Ongoing work to promote and recognise the value of Playworkers and continue exploring solutions to the recruitment and retention challenges.

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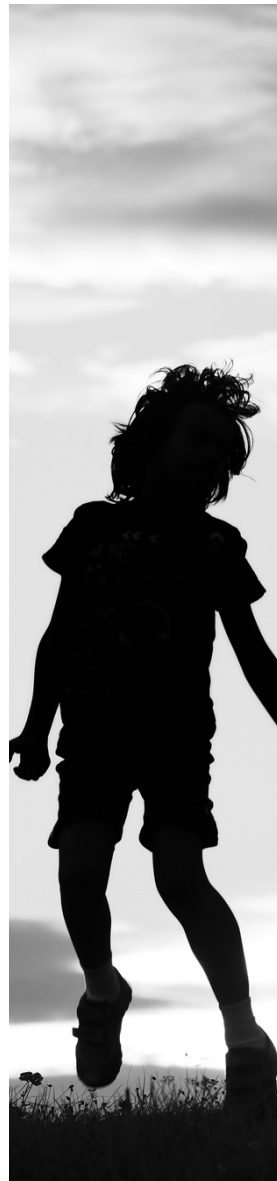
04. Continued commitment to funded qualification and training opportunities that meet a variety of eligibility requirements to support recruitment needs and CIW registration status.

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05. Ongoing work to educate and inform communities across Wales about children's right to play and the value of play and its positive impact on wellbeing (especially given the statistics on children's support needs) and CIW registered Out of School Childcare for children.

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06. Ongoing work to promote the benefits of registering for Tax-Free Childcare and the Childcare Offer to families and childcare businesses.



# ARGYMHELLION

21

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03. Gwaith parhaus i hyrwyddo a chydabod gwerth Gweithwyr Chwarae a pharhau i archwilio atebion i'r heriau recriwtio a chadw.

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04. Ymrwymiad parhaus i gyfleoedd cymhwysu a hyfforddi sy'n bodloni amrywiaeth o ofynion cymhwysu er mwyn cynorthwyo gyda'r anghenion recriwtio a statws cofrestriad gydag AGC.

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05. Gwaith parhaus i addysgu a hysbysu cymunedau ledled Cymru am hawl plant i chwarae a gwerth chwarae a'i effaith gadarnhaol ar les (yn enwedig o ystyried yr ystadegau ar anghenion cymorth plant) a Gofal Plant All-ysgol, sy'n gofrestrdig ag AGC, i blant.

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06. Gwaith parhaus i hyrwyddo manteision cofrestru ar gyfer Gofal Plant Di-dreth a'r Cynnig Gofal Plant i deuluoedd a busnesau gofal plant.

## Staffing:

“With all our services including the out of school provision we are finding it extremely difficult to recruit appropriately qualified staff or staff that are able to work the required hours.”

“The biggest threat to sustainability is not financial but staffing. The lack of surplus qualified staff means we cannot recruit staff who are already qualified particular at level 3 which is coursing a barrier to sustainably and expansion within our business.”

“Club struggling with qualification requirements due to being in a rural area- advertised online and in school (free ASC for children of parents who work) but no one interested.”

“Those candidates who have it want full time jobs in nurseries. Teachers, etc, who are available in school holidays, are not required to have play work - although play work/foundation phase is a massive part of their courses making the need for a separate qualification questionable. Holiday clubs need to be treated differently to full time care settings. Valuing the sector.”



## Staffio:

“Gyda'n holl wasanaethau gan gynnwys y ddarpariaeth y tu allan i oriau ysgol, rydym yn ei chael hi'n anodd iawn recriwtio staff â chymwysterau priodol neu staff sy'n gallu gweithio'r oriau gofynnol.”

“Nid ariannol yw'r bygythiad mwyaf i gynaliadwyedd ond staffio. Mae'r diffyg staff cymhwysedig dros ben yn golygu na allwn recriwtio staff sydd eisoes wedi cymhwyso'n benodol ar lefel 3 sy'n arwain at rwystr i gynaliadwyedd ac ehangu yn ein busnes.”

“Clwb yn cael trafferth gyda gofynion cymwysterau oherwydd ei fod mewn ardal wledig - wedi'i hysbysebu ar-lein ac yn yr ysgol (CPA am ddim i blant rhieni sy'n gweithio) ond nid oedd gan neb ddiddordeb.”

“Mae'r ymgeiswyr hynny sydd ag ef eisiau swyddi amser llawn mewn meithrinfeydd. Nid yw'n ofynnol i athrawon, ac ati, sydd ar gael yn ystod gwyliau'r ysgol, gael gwaith chwarae - er bod gwaith chwarae/cyfnod sylfaen yn rhan enfawr o'u cyrsiau sy'n gwneud yr angen am gymhwyster ar wahân yn amheus. Mae angen trin clybiau gwyliau yn wahanol i leoliadau gofal llawn amser. Gwerthfawrogi'r sector.”



## Sustainability/funding

“Could you create a Fair rent policy - I pay £1,595 a month rent to the school. It has doubled in price.”

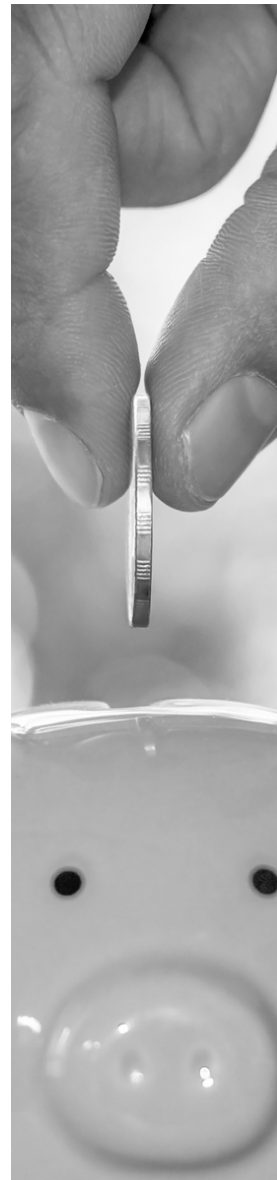
“We need to increase our fees to cater for the increase in the minimum wage. This will happen within 6 months but not 'only' within 6 months - it will be ongoing.”

“Club struggling financially- 2 staff relying on LSAs from school to volunteer. In a low income/diverse area. CIW registration would help financially for club and area however owner is worried.”

“Having the Welsh bursary funding for CIW registration and L2 & L3 Playwork training has enabled me to get the Directors on board with developing the Welsh language - thank you.”

“We have recently signed up to the Welsh Promise and look forward to working with Clybiau Plant Cymru Kids' Clubs to improve our Welsh usage within our setting.”

“Since COVID our after school club and holiday club has not gone back to previous numbers. We used to have 25 to 28 children each day for after school club. However, many parents have continued to either work from home or have adjusted their work hours around school times. Covid has had a huge impact on our after school club and holiday club provision, we continue to run at a loss, for how much longer we are unsure.”



## Cynaliadwyedd/cyllid

“Allech chi greu polisi rhent teg - rwy'n talu £1,595 y mis o rent i'r ysgol. Mae wedi dyblu yn y pris.”

“Mae angen i ni gynyddu ein ffioedd i ddarparu ar gyfer y cynnydd yn yr isafswm cyflog. Bydd hyn yn digwydd o fewn 6 mis ond nid 'yn unig' o fewn 6 mis - bydd yn parhau.”

“Clwb yn ei chael hi'n anodd yn ariannol - 2 aelod o staff yn dibynnu ar gynorthwyr cymorth dysgu o'r ysgol i wirfoddoli. Mewn ardal incwm isel/amrywiol. Byddai cofrestru gydag AGC yn gymorth ariannol i'r clwb a'r ardal, fodd bynnag mae'r perchennog yn poeni.”

“Mae cael cyllid bwrsariaeth Cymraeg ar gyfer cofrestru gydag AGC a hyfforddiant Gwaith Chwarae L2 a L3 wedi fy ngalluogi i gael y Cyfarwyddwyr i fod yn rhan o ddatblygu'r Gymraeg - diolch. “

“Rydym yn ddiweddar wedi ymuno ag Addewid Cymru ac yn edrych ymlaen at weithio gyda Chlybiau Plant Cymru Kids' Clubs i wella ein defnydd o'r Gymraeg yn ein lleoliad.”

“Ers COVID, nid yw ein clwb ar ôl ysgol a chlwb gwyliau wedi mynd yn ôl i'r niferoedd blaenorol. Roeddem yn arfer cael 25 i 28 o blant bob dydd ar gyfer clwb ar ôl ysgol. Fodd bynnag, mae llawer o rieni wedi parhau naill ai i weithio gartref neu wedi addasu eu horiau gwaith o gwmpas amserau ysgol. Mae Covid wedi cael effaith enfawr ar ein darpariaeth clwb ar ôl ysgol a chlybiau gwyliau, rydym yn parhau i redeg ar gollod, am faint hirach rydym yn ansicr.”

## Children and families

"We have seen an increase in children with ALN which I feel the LA are unable to meet the needs. We do on times feel pressured by services when requesting childcare places if we have stated that we feel we are unable to meet the child's needs. We are concerned with regards the impact on salary increases and how we are going to meet the ever increasing costs."

"We continue to look for funding and if needed we do have a fee wavering policy to help with inclusion."

"There is not enough money available to support the wellbeing needs of the children, the impact of Covid has been massive on the children and is still obvious. More money is needed to provide free place spaces for children who are struggling with their physical and wellbeing abilities."

"Parents don't sign up for the service because of the costs, even though it is the cheapest in the area."



## Plant a theuluoedd

"Rydym wedi gweld cynnydd yn nifer y plant ag ADY a theimlaf nad yw'r ALL yn gallu diwallu'r anghenion. Ar adegau rydym yn teimlo pwysau gan wasanaethau wrth ofyn am leoedd gofal plant os ydym wedi datgan ein bod yn teimlo na allwn ddiwallu anghenion y plentyn. Rydym yn pryderu ynghylch yr effaith ar godiadau cyflog a sut yr ydym am gwrdd â'r costau cynyddol."

"Rydym yn parhau i chwilio am gyllid ac os oes angen mae gennym bolisi hepgor ffioedd i helpu gyda chynhwysiant."

"Nid oes digon o arian ar gael i gefnogi anghenion lles y plant, mae effaith Covid wedi bod yn enfawr ar y plant ac yn dal yn amlwg. Mae angen mwy o arian i ddarparu lleoedd am ddim i blant sy'n cael trafferth gyda'u galluoedd corfforol a lles."

"Nid yw rhieni yn cofrestru ar gyfer y gwasanaeth oherwydd y costau, er mai dyma'r rhataf yn yr ardal"



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