



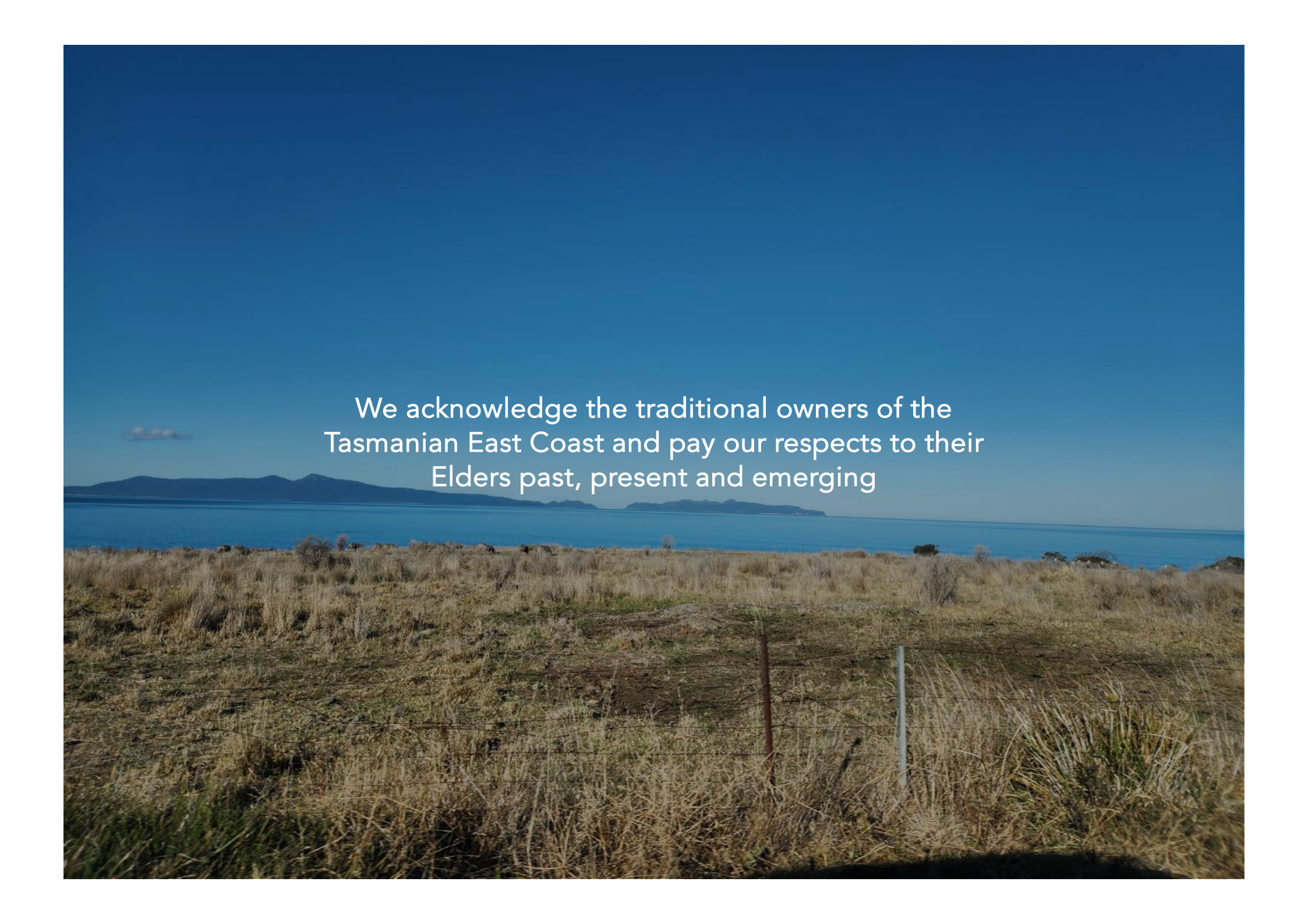
St Marys & East Coast Tasmania ECEC & OSHC Needs Analysis

For the Eastern Strategic Regional Partnership

Break O'Day Council (Funded by the Tasmanian Government)

October 2025





We acknowledge the traditional owners of the
Tasmanian East Coast and pay our respects to their
Elders past, present and emerging

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EXECUTIVE SUMMARY

Background, Key Challenge & Question

The project aims to create a sustainable ECEC & OSHC model for St Marys and the East Coast to close service gaps, support jobs, and strengthen the community



Background

The St Marys and East Coast ECEC & OSHC Needs Analysis, led by Break O'Day Council (BODC) and supported by the Tasmanian Government, aims to address critical gaps in early childhood education and care (ECEC) & outside school hours care (OSHC) services. Limited access to these services is a major barrier to workforce participation and regional growth. This two-part project will assess the need for a new facility in St Marys and expand the analysis to the East Coast region.



Key Challenge

Access to quality ECEC & OSHC remains a major challenge for families in St Marys and the East Coast, limiting employment and education opportunities. Service gaps, workforce shortages, and financial constraints hinder expansion. Sustainable solutions require a clear understanding of demand, service models, funding, and site feasibility, necessitating collaboration across government, providers, and the community.

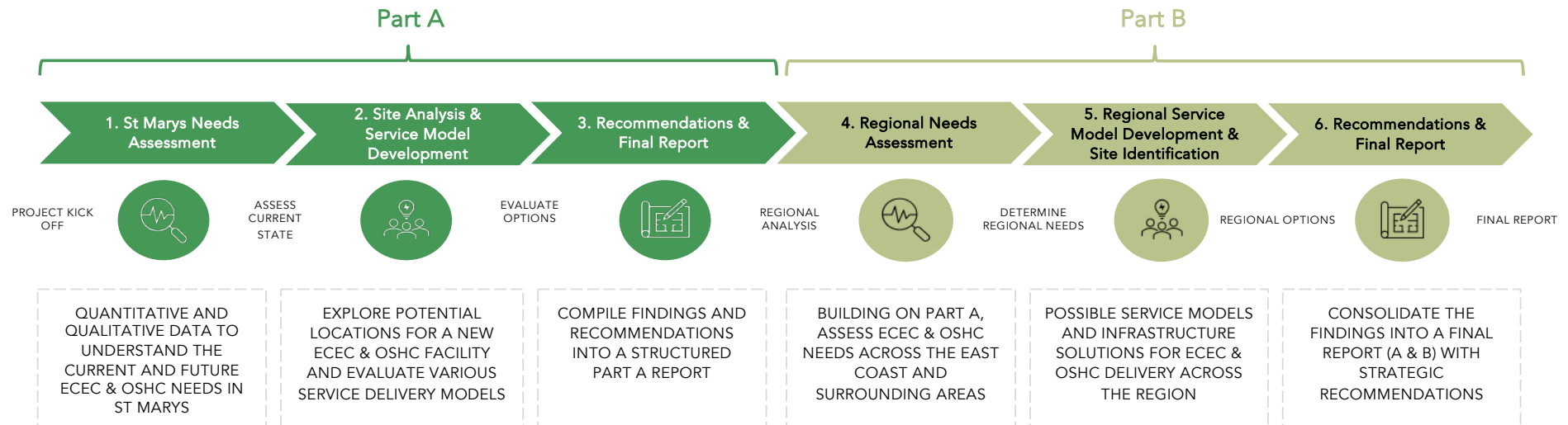


Key Question

How can a sustainable and accessible ECEC & OSHC model be developed for St Marys and the East Coast region to meet current and future demand, support workforce participation, and enhance community well-being while ensuring long-term economic viability?

Please note: While a key part of education and care, **Family Day Care** is not available on the East Coast and was excluded from deep analysis.

Recommended Approach



Part A: St Marys Needs Assessment Overview

Part A includes a comprehensive assessment of current and future ECEC & OSHC needs in St Marys to inform service models, workforce opportunities, funding options, and potential site development

Methodology

This section outlines the structure and purpose of Part A of the St Marys & East Coast Childcare Needs Analysis. It sets out the evidence base and approach used to assess current and future ECEC & OSHC needs, identify and evaluate potential sites, and develop recommendations for future service delivery and investment.

Purpose

Assess the ECEC & OSHC needs in St Marys and understand future service needs and requirements, identify and evaluate potential new site and recommend future service delivery model and funding sources/opportunities

St Marys Needs Assessment

Establishes the social, demographic, and economic context for St Marys and the Break O'Day region and helps identify the underlying factors influencing ECEC & OSHC demand and family needs.

BOD & St Marys Demographic Analysis

- Population
- Household
- Workforce
- Economic

ECEC & OSHC Service Models

- Current services
- Programs
- Delivery models

Future Service Requirements

- Future demand
- Future service needs

St Marys Future Service Requirements

Identifies and assesses potential locations for a future ECEC & OSHC facility and aligns service models with community needs, workforce access, and co-location opportunities.

Site Analysis & Evaluation

- Evaluation lenses
- Risk lenses
- Finance lenses

Future Service Model & Funding

- Future service model
- Funding pathways

Recommendation

- A recommendation informed by all Part A findings, encompassing the proposed scope of works for a new facility, workforce development opportunities, potential service delivery models—including collaborative care approaches—and an analysis of existing and prospective funding options to support a sustainable service.

Part A: Data Methodology

An in-depth understanding of the St Marys and East Coast Childcare Needs Assessment through comprehensive data analysis from key sources

Methodology

A thorough analysis of existing practises and data was undertaken to assess the ECEC & OSHC needs in St Marys and East Coast. This analysis helped identify key trends, gaps, and opportunities, providing valuable insights prior to engagement with the community.

Purpose

- Assess the current state including service provision
- Identify key trends, gaps, and opportunities for improvement
- Establish a robust foundation of evidence to inform strategic planning and decision-making for the St Marys and East Coast Childcare Needs Analysis

Approach

- **Data Collection:** Gathering relevant datasets from the identified sources
- **Data Validation:** Ensuring the accuracy, relevance, and timeliness of the data
- **Trend Analysis:** Examining historical and current trends to highlight patterns

Outcome

The findings from the data analysis established a strong foundation to engage with the community, providing a clear understanding of ECEC & OSHC needs in St Marys and East Coast and guide meaningful discussions which consider community needs and aspirations.

Sources

A range of existing data sources were utilised to conduct a comprehensive needs assessment. Key resources included:

- **Council Strategies and Reports:** Insights into past and current priorities, policies, and outcomes
- **Tasmania Strategies and Reports:** Early learning and population information
- **Economy ID:** Detailed demographic, economic, and social data specific to the region
- **Australian Bureau of Statistics (ABS):** National-level data providing benchmarks and broader context
- **Health care data:** Tasmania PHN (PHT) data
- **Lisa Denny Future Thinking Demographic Change Report:** Break O'Day specific demographic information
- **Thrive Group & Lady Gowrie Tasmania:** Region specific supply and demand data



The data methodology involved a comprehensive analysis of multiple data sources to assess the ECEC & OSHC needs in St Marys and East Coast, identify trends and gaps, and establish an evidence base to inform future planning and community engagement.

Part A: Consultation Methodology

NMC engaged stakeholders through 1:1 consultations to validate data insights, uncover valuable perspectives, and understand the needs of ECEC & OSHC and services along the Tasmanian east coast

Methodology

NMC conducted over 38 one-on-one consultations with key stakeholders during the engagement phase. These consultations were instrumental in validating insights derived from the data analysis and identifying key focus areas for inclusion in the St Marys and East Coast Childcare Needs Assessment.

Purpose

- Deepen understanding of stakeholder perspectives and priorities
- Identify 'Gold Nuggets' of information that provide unique insights and add significant value to the project
- Validate findings from data analysis to ensure alignment with community realities
- Co-design focus areas and actionable strategies to address identified gaps and opportunities

Approach

- Tailored, one-on-one discussions with a diverse cross-section of stakeholders
- Open-ended questions to encourage detailed input and foster meaningful dialogue
- Data-informed discussions to bridge findings with lived experiences

Outcome

The consultations provided critical qualitative insights, ensuring the Plan reflects the needs and aspirations of diverse stakeholders. This process built a foundation for a community-driven and inclusive approach to strategic planning.



NMC conducted over 38 one-on-one stakeholder consultations to validate data insights, capture diverse community perspectives, and co-design actionable strategies addressing ECEC & OSHC needs and service gaps along Tasmania's east coast.

Part A: St Marys ECEC Services

Long day care and kindergarten are offered in St Marys while outside school hours care and family day care services are not

Understanding the structure of ECEC (0-5y) & OSHC (5-12y) services is essential to assessing gaps in St Marys. The following outlines key service types, age groups, who provides them, and what government support is available.



Offered In St Marys

Long Day Care refers to centre-based education and care for children aged 0–5 years, typically operating full-day hours. In St Marys, this is delivered through a small, not-for-profit licensed service catering to mixed-age groups with capped daily places, regulated under the National Quality Framework (NQF).

Long Day Care: 0–5 years (with mixed-age grouping in small centres like St Marys).



Not offered In St Marys

Outside School Hours Care (OSHC) Out of school hours care (OSHC) is the name commonly given to services that provide education and care to school age children before/after school and during school holidays. St Marys previously offered OSHC, but it ceased in 2019 due to low demand and logistical barriers. Recent trends suggest a **renewed need** for OSHC to support working families, though space and staffing remain obstacles.

OSHC: 4–12 years (primary school-aged).



Not offered In St Marys

Family Day Care is flexible, home-based care for small groups of children (often across varied age ranges), delivered by registered educators. While available elsewhere in the region, it has proven **unsustainable in St Marys**, with services often short-lived due to limited local educator availability.

Family Day Care: 0–12 years (depending on educator capacity).



Offered In St Marys

Kindergarten in Tasmania is a part-time, play-based early learning program for children in the year before formal schooling (Prep). Kindertgartens are delivered through Tasmanian schools. Every government school offers at least 15 hours of kinder per week, over two to three days.

Kindergarten: 4–5 years (the year before Prep - age 4 by January 1)



Early Learning for Three-Year-Olds (EL3 Initiative)

The Tasmanian Government wants all children in Tasmania to be able to access quality early learning in the year before kindergarten, to give them a great start in life and learning.

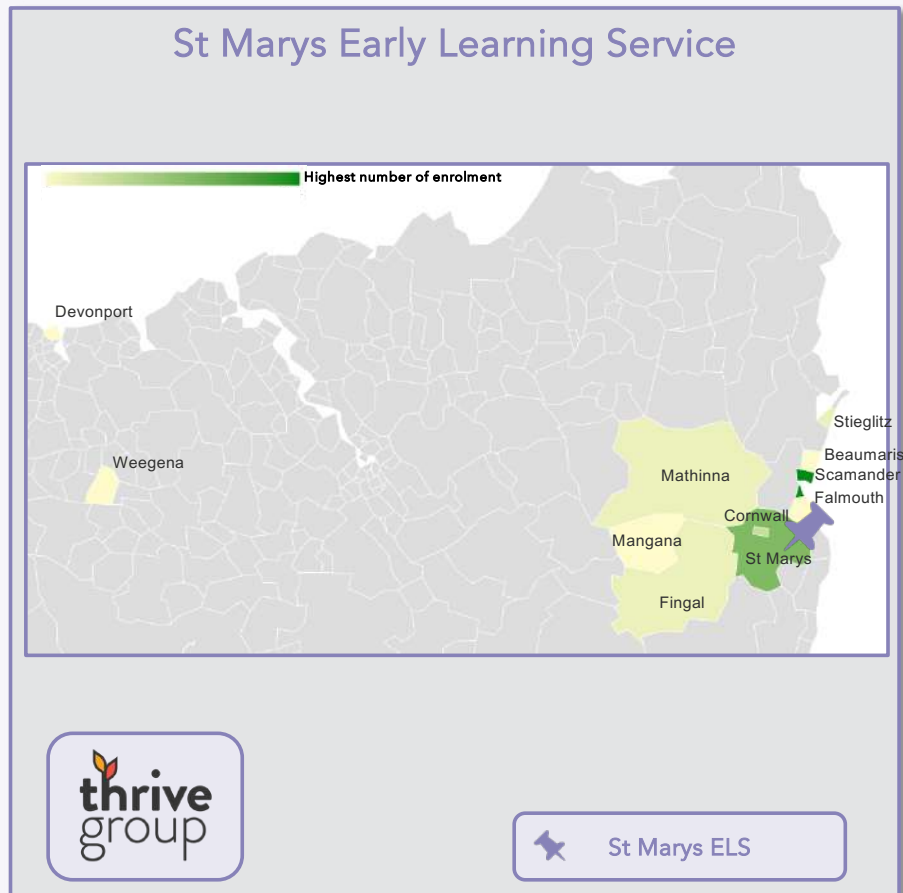
The Early Learning for Three Year Olds (EL3) initiative aims to support the capacity of Tasmania's Early Childhood Education and Care (ECEC) services to ensure that quality early learning is available where children and families need it.

Sources:

- Consultations
- DECYP
- National Quality Framework

Part A: Map of Enrolments

Children attend St Marys ELS from across several nearby towns—most notably Scamander, Mathinna and Fingal—highlighting regional reliance on a single central service and the need to expand access locally



Sources:

- ABS Census Data
- Thrive Group Data

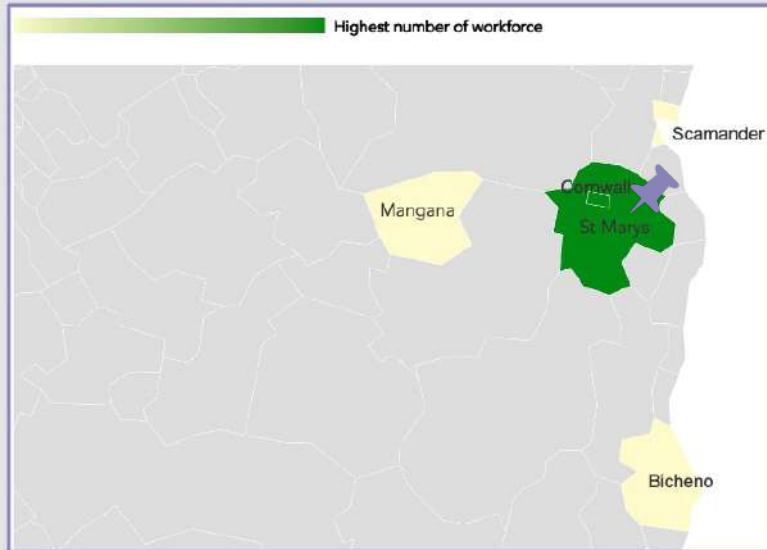
Analysis:

- Data shows that children attending the St Marys Early Learning Service come from a broad catchment area, including townships such as St Marys, Scamander, Mathinna and several outlying rural communities. This geographic spread reflects both the limited availability of childcare across the region and the central role St Marys plays in local early years service delivery.
 - Scamander accounts for the most enrolment (13), even higher than the St Marys township itself (8). This could be most likely due to parents preferring ECEC & OSHC services where their work is located.
 - Families places of residence appear in distant towns like Devonport and Weeena—over two hours away. While some families may travel this far for services, consultation insights suggest they may have failed to update their current address or instead may be part of a transient population based in these towns but accessing services along the East Coast.
 - The diversity of home locations underscores the region's transport disadvantage, making localised or co-located services in St Marys even more essential.
 - The service draws enrolments from over 11 different localities, reinforcing the lack of alternative ECEC & OSHC options on the east coast.
- The St Marys service is a regional hub for early learning, serving families well beyond the town boundary.
 - Transport distance is a barrier—underscoring the importance of expanding local capacity and co-locating services.
 - Demand is not confined to St Marys—there is regional unmet need, especially in towns like Scamander, Mathinna, and beyond.

Part A: ECEC & OSHC Workforce Challenges and Recruitment

Staffing and workforce attraction limitations are severely impacting ECEC & OSHC on Tasmania's east coast

St Marys Early Learning Service



St Marys ELS

Very few students complete their ECE Certificate III or Diploma on the east coast, with the highest annual completion between 2019 and 2023 being just 15.

Sources:

- Consultations
- Tasmania Workforce Compass Vocational Education



Workforce Challenges

- **Staff Shortages:** Centres like Swansea operate at capacity with limited flexibility; Bicheno relies on staff commuting from St Helens.
- **Low Training Completions:** The South East Coast recorded zero Certificate III completions in 2023.

Consultation Findings:

- **Recruitment Gaps:** In-home care programs remain inactive due to an inability to attract educators.
- **Poor Career Progression:** Minimal pay difference between Cert III and Diploma roles discourages upskilling.
- **High Turnover:** Consultations anecdotally revealed that Diploma-qualified staff often leave for better-paid or more flexible jobs.
- **Service Mismatch:** ECEC & OSHC hours don't meet the needs of hospitality and tourism workers.
- **Workforce Instability:** Seasonal population shifts and housing shortages undermine staffing continuity.



Pipeline of New Educators

- **Training Completions Remain Low And Unstable:** In the Northeast, only 5 people completed a Certificate III in 2023—down from 10 per year between 2020–2022. The Southeast Coast recorded just one year of completions (5 in 2022) over a five-year period, with zero completions in 2019, 2020, 2021, and 2023.
- **Limited Age Diversity:** Most completions are by younger and mid-career adults; almost none from older workers.
- **Few Traineeships:** Limited centre capacity and transport barriers restrict local training.
- **Poor Retention:** Relocation incentives have low impact, with many leaving within 2–3 years.
- **Current Support:** EL3 funds a study mentor and resources for five Certificate III in ECEC students who meet weekly at the CFLC. Thrive has hired a Project and Training Advisor to support learners, coordinate local placements, and assist with employment.
- **Support Coming:** Skills Tasmania plans new incentives (bonuses, mentoring, relocation) by mid-2025.

Part A: St Marys Early Learning Service Supply & Demand

St Marys ELS experiences reliance from surrounding towns highlighting the need for expansion

Demand

	2024	2025	2026	2027	2028	2029
St Marys & Scamander (0-4)*	56	55	55	56	56	57
LDC & OSHC Enrolments	49	33**	36	36	36	36
Capacity (Licensed Places)	10	10	10	10	10	10
Optimal Licensed Places	39	26	29	29	29	29
Licensed Places Gap	29	16	19	19	19	19

Supply

	Year	Number
Current Number of Educators	2025	7
Optimal Number of Educators	2029	10
Additional Educators to Meet Demand	2029	+3

- *St Helens & Scamander as these towns have the highest enrolment numbers at this centre.
- **Data collection occurred in mid-2025, figures for that year may be partial or incomplete.
- The additional places and educators are based on projected enrolments, a minimum of four care days per child, and an assumed average 1:7 educator-to-child ratio (average of 1:4, 1:5, and 1:10 ratios), to estimate FTE educators needed for optimal licensed capacity.
- See Appendix C for detailed supply/demand model.

To meet the projected growth in St Marys, where demand requires an additional **19 licensed places**, the workforce will need to expand by at **least 3 educators** to ensure safe ratios and service continuity.

Regional Reliance – The St Marys service supports families from more than 11 towns, with enrolments already well above its 10 licensed places.

Scamander Demand – Enrolments from Scamander are the highest in the region, surpassing even those from St Marys itself. Current regional development planning in Scamander-Beaumaris may proportionally increase enrolments at St Marys ELS over time.

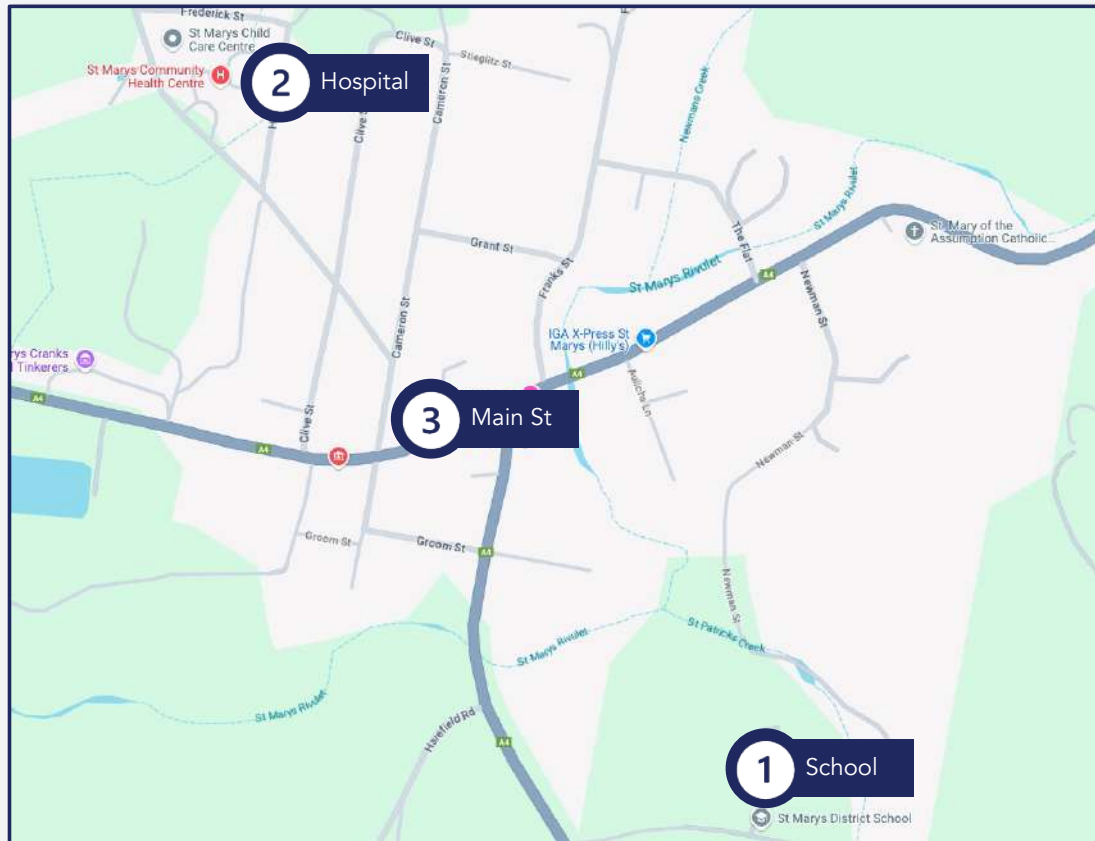
Transport Barrier – With only 10 places available against around 36 enrolments by 2025, many families are forced to travel long distances to access care.

Broad Catchment – Families from rural towns such as Mathinna, Fingal and Cornwall rely on the service, adding pressure to already limited places.

Unmet Need – The service faces a sustained shortfall of 16–29 places through to 2029, highlighting significant regional shortages in ECEC and OSHC.

Part A: Potential ECEC & OSHC Centre Locations

The three proposed sites for the St Marys ECEC & OSHC centre—at the school, health centre, and town centre—each offer unique advantages in education, health integration, and community access



Three potential locations have been identified for the new ECEC & OSHC facility in St Marys, each offering different benefits and challenges in terms of access, integration with existing services, and long-term suitability.

Option 1: St Marys District School 1

- Build a ECEC & OSHC facility co-located with the school to support smoother transitions, and collaboration between early learning and K–12.
- Address: 13 Gray Rd, St Marys

Option 2: Rear of St Marys Community Health Centre 2

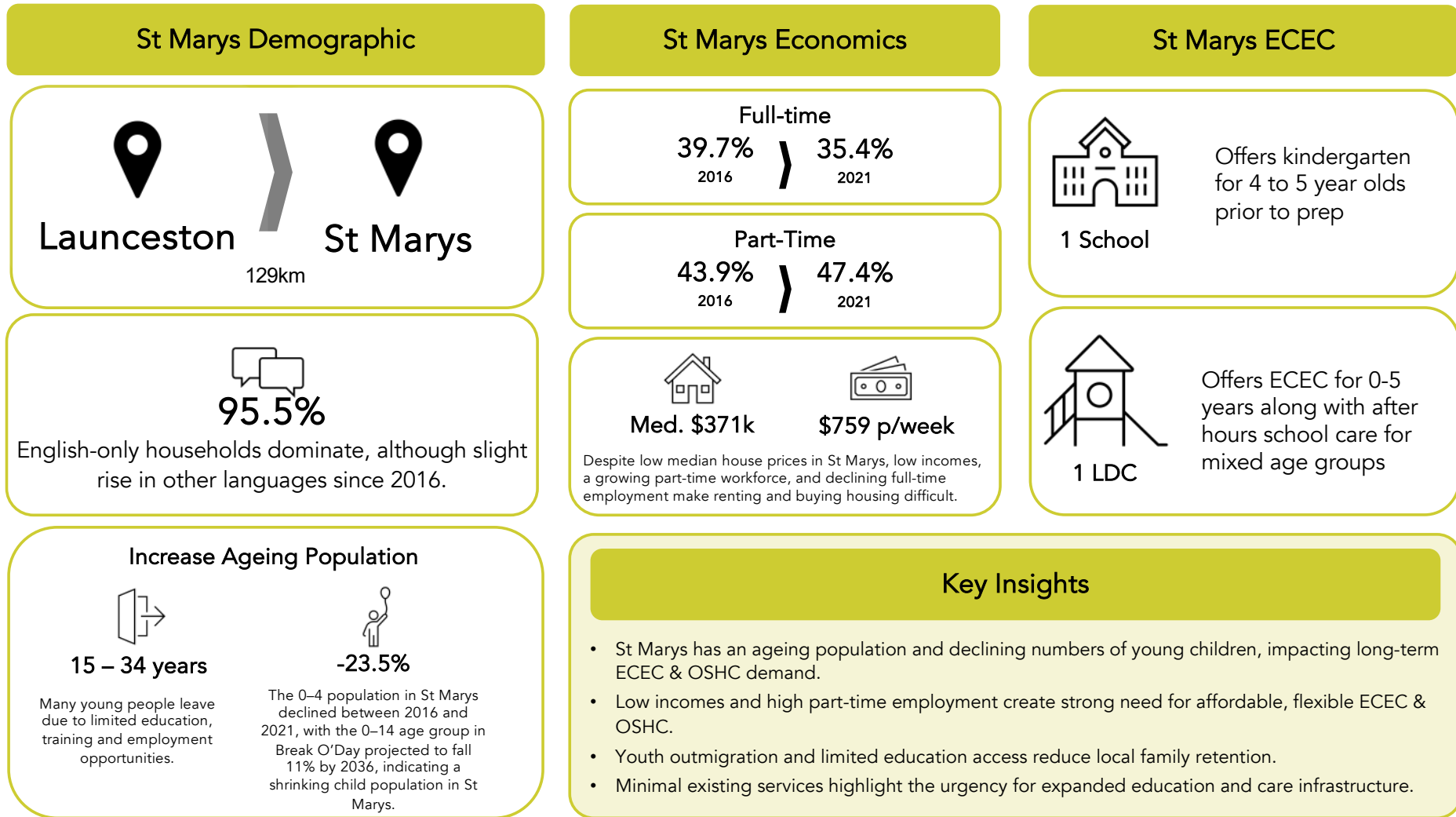
- Build on the existing site to strengthen ties between ECEC & OSHC and health services, improving convenience for staff and access to support for families.
- Address: 13-17 Gardiners Creek Road, St Marys

Option 3: Main Street 3

- Build a standalone ECEC & OSHC centre in the heart of town for maximum visibility and walkability, though with limited space and no co-location opportunities.
- Address: 17 Main Street, St Marys

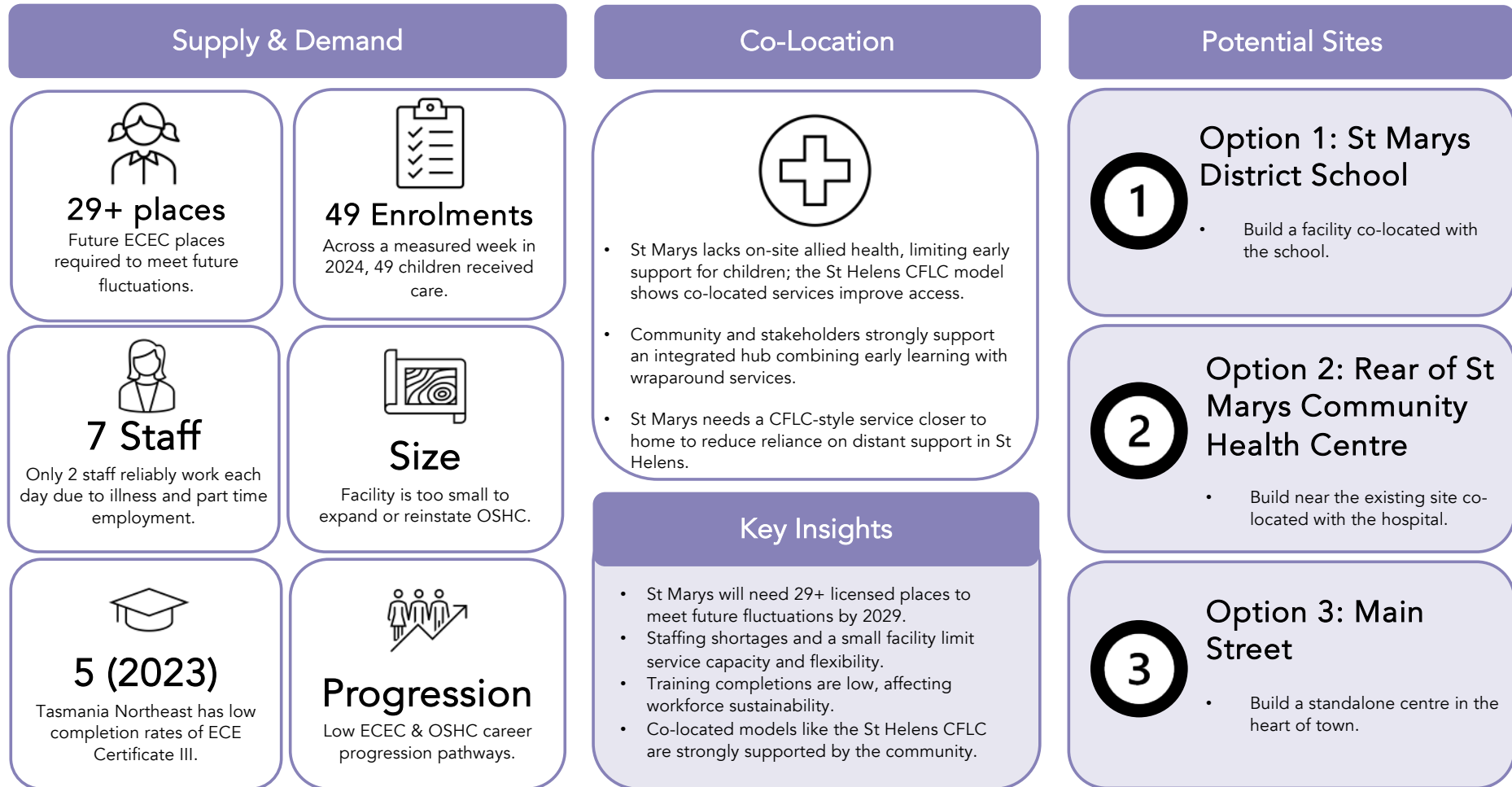
Part A: St Marys Needs Assessment Takeaways

St Marys' ageing population, youth outmigration, and limited services create urgent need for affordable, flexible ECEC & OSHC services to support local families and reverse long-term decline



Part A: St Marys Needs Assessment Takeaways (contd.)

St Marys needs 26 more enrolled places, but staffing, space, and training limitations require a co-located solution, with three potential sites identified



Part A: Evaluation Methodology

The feasibility of all options was comprehensively evaluated using quantitative and qualitative data, captured throughout the project

1.

Evaluation by Lenses

To evaluate the impact of implementing each option, the report uses **six evaluation lenses**.

Each lens combines qualitative and quantitative analysis.

The lenses are:

1. Demand
2. Location
3. Size
4. Workforce
5. Community & Families
6. Timeframe

2.

Evaluation by Risks

The implementation of each option presents several **risks** to the Council and community with **varying levels of likelihood and impact**.

The report identifies **six risk types** for the Council to prioritise, in order of potential impact to the key stakeholders.

The five risk types are:

1. Site Suitability & Land Use
2. Operational & Service Delivery
3. Regulatory Compliance
4. Family & Community
5. Financial & Economic

3.

Financial Evaluation

The implementation of each option carries financial implications that vary in scale, complexity, and long-term impact.

There are five key financial considerations for the Council to evaluate when assessing the viability of each option.

The five financial dimensions are:

1. Capital Cost (CapEx)
2. Operating Cost (OpEx)
3. Revenue & Funding Sources
4. Whole-of-Life Cost
5. Opportunity Cost/Value-for-Money

Part A: Evaluation Summary

Evaluation summary of three options across three criteria

		OPTION 1 St Marys District School	OPTION 2 Rear of St Marys Community Health Centre	OPTION 3 Main Street
Evaluation by Lenses	DEMAND			
	LOCATION			
	SIZE			
	WORKFORCE			
	COMMUNITY & FAMILIES			
	TIMEFRAME			
	SCORE			
Evaluation by Risk	SITE SUITABILITY & LAND USE			
	OPERATIONAL & SERVICE DELIVERY			
	REGULATORY COMPLIANCE			
	FAMILY & COMMUNITY			
	FINANCIAL & ECONOMIC			
	SCORE			
Evaluation by Finance	CAPITAL COST (CAPEX)			
	OPERATION COST (OPEX)			
	REVENUE & FUNDING SOURCES			
	WHOLE-OF-LIFE COST			
	OPPORTUNITY COST/VALUE-FOR-MONEY			
	SCORE			
Total Score		71/80	67/80	42/80

Legend: Very Low Low Moderate High Very High Very Low Low Medium High Very High

Part A: Future Service Model & Funding Summary

A co-located model at St Marys District School is the most viable option, but long-term success relies on sustainable funding, flexible service models, and low-cost premises to ensure resilience

Section Summary



The analysis confirms that a **co-located model at St Marys District School is the most viable pathway** to meet local demand while addressing space and workforce challenges.

However, long-term success will depend on securing sustainable funding through a combination of subsidies, targeted grants, and concessional land use, alongside exploring flexible service models to ensure resilience in a low-population market.

Co-location offers the strongest model

Positioning the new ECEC & OSHC facility at **St Marys District School** maximises access, overcomes site constraints, and enables integrated service delivery.

Alternative models remain valuable

Mini Child and Family Learning Centre and flexible OSHC reinstatement options were noted as complementary approaches to broaden access and meet community needs.

Funding sustainability is mixed

Services rely on a **blend of subsidies, parent fees, and one-off grants**, with thin markets like St Marys particularly exposed to revenue volatility.

Targeted funding opportunities exist

Future rounds of the **Community Child Care Fund** and ongoing supports (e.g. Inclusion Support Program, EL3) present viable pathways for capital, expansion, and business planning.

Low-cost premises improve viability

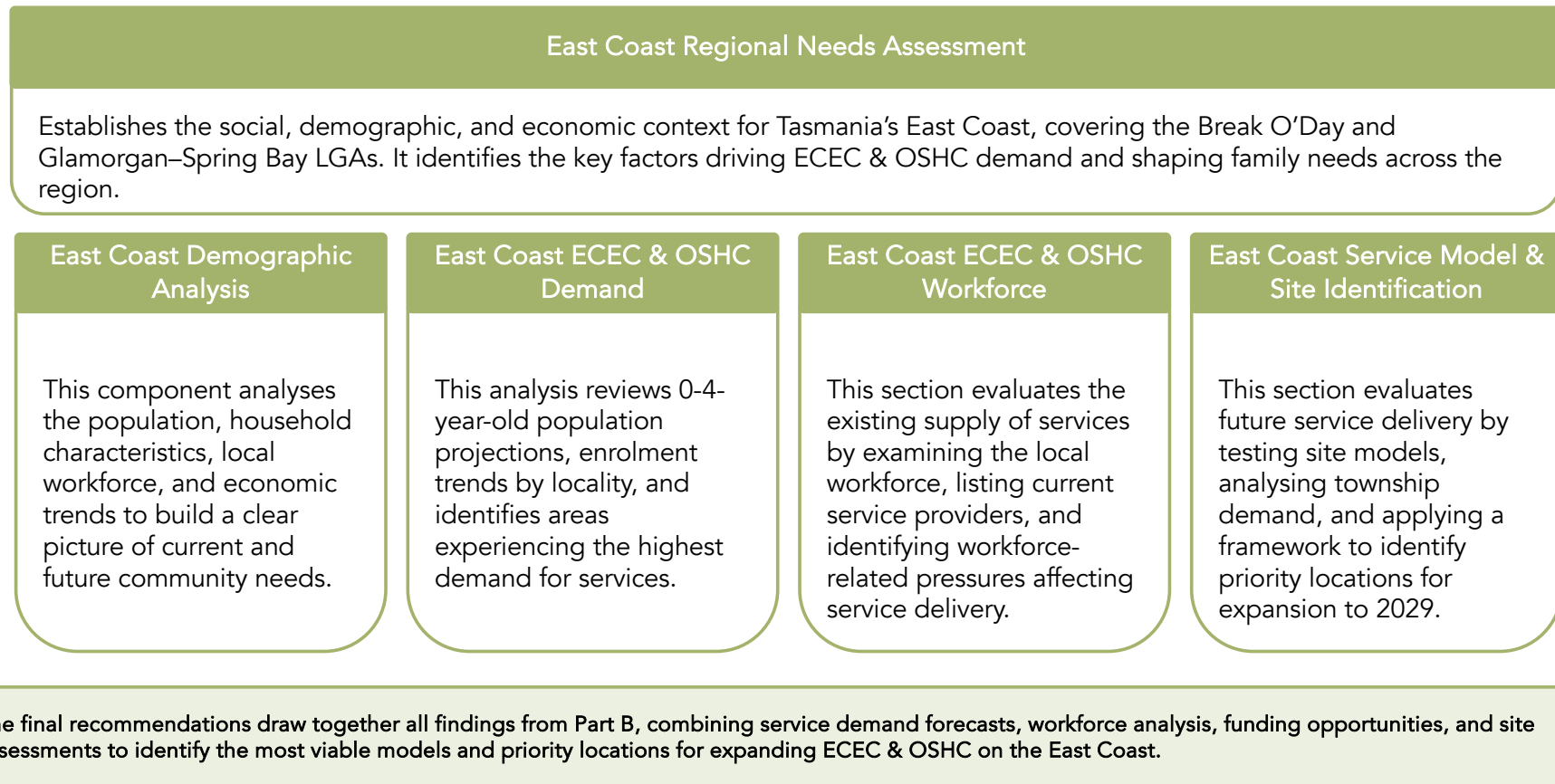
Leveraging concessional school land and shared infrastructure reduces operating costs and increases sustainability.

Part B: Part B Overview

Part B includes a comprehensive assessment of current and future ECEC & OSHC needs on the East Coast of Tasmania to inform service models, workforce opportunities, funding options, and potential site development

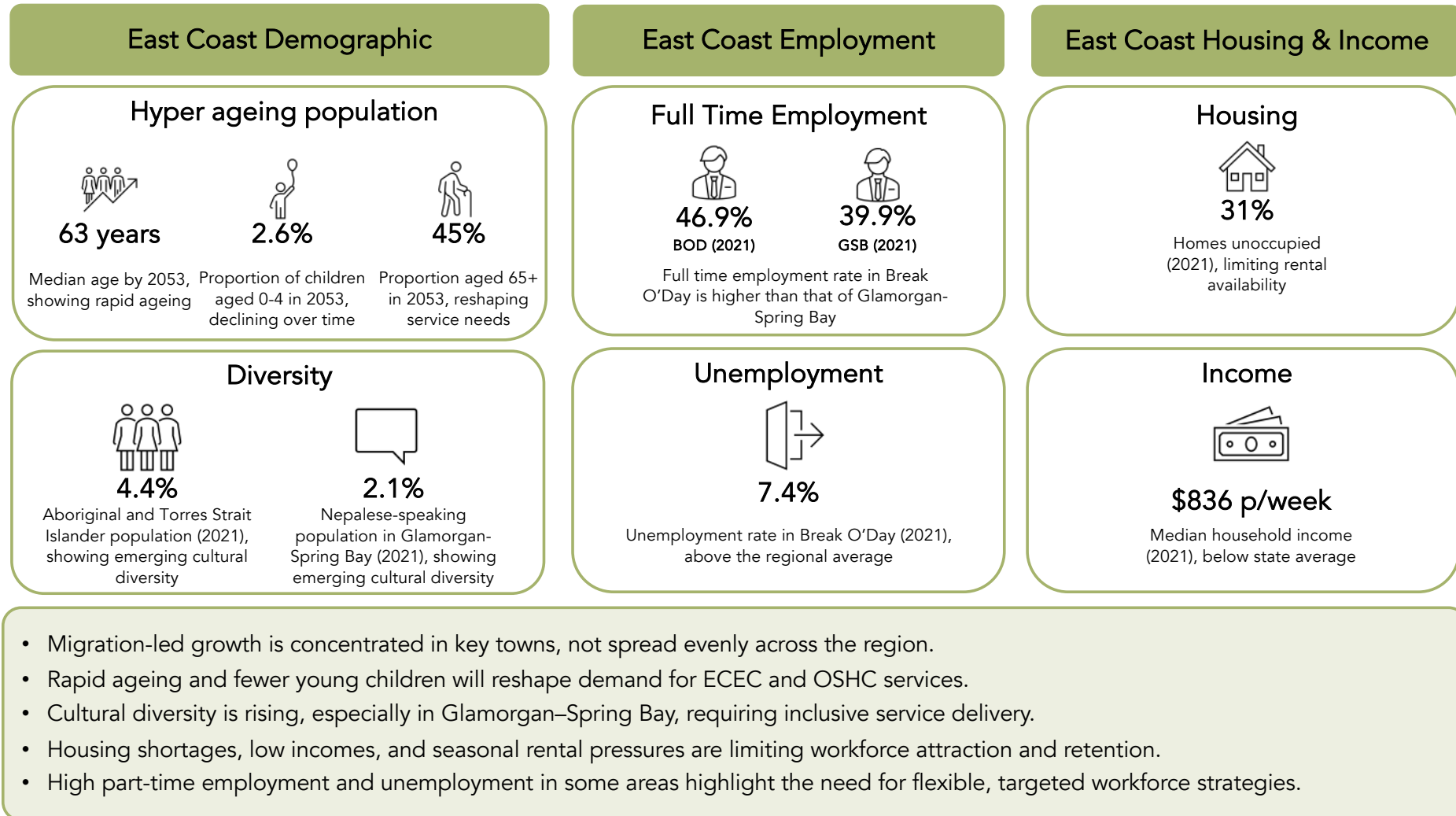
Methodology

This section outlines the structure and purpose of Part B of the St Marys & East Coast Childcare Needs Analysis. It sets out the evidence base and approach used to assess current and future ECEC & OSHC needs, identify and evaluate potential sites, and develop recommendations for future service delivery and investment.



Part B: East Coast Demographic Analysis Summary

The East Coast faces migration-led growth concentrated in key towns, rapid ageing, rising diversity, housing and income constraints, and workforce challenges requiring targeted strategies



Part B: ECEC & OSHC Demand Summary

By 2029, urgent expansion is needed to ensure accessible and resilient services

ECEC & OSHC Demand by Township

Projected demand to 2029 shows widening gaps across most East Coast centres, with several towns requiring significant expansion to keep pace with community needs.

Location	Current Licensed Places (2025)	Optimal Licensed Places (2029)	Additional Licensed Places (2029)
St Helens	66	106	+40
Bicheno	32	49	+17
Triabunna	20	38	+18
Swansea	28	46	+18
St Marys*	10	29	+19

Refer to Appendix C for full demand requirements methodology

*Please see Part A of this document for detailed St Marys forecasting

St Helens remains the *anchor town*, but its persistent 40-place gap shows the limits of relying on one regional hub. The current model concentrates too much demand here, forcing families from inland and coastal areas to travel.

St Marys demonstrates the risks of under-investment in inland services. Despite a small local child population, its role as a service hub (especially for Scamander) creates demand beyond its 10 licensed places. The data confirms consultation feedback that St Marys requires more places and a sustainable workforce strategy, otherwise shortfalls will continue. Additionally, St Marys required 39 optimal licensed places in 2024 demonstrating the need to account for fluctuations.

Bicheno and **Swansea** illustrate how *single-service towns* are highly vulnerable. With no alternatives nearby, even modest shortfalls (15–17 places) translate into major community impacts, especially for workforce participation and family stability. These towns present clear expansion opportunities, but also highlight the need for resilient, multipurpose infrastructure.

Triabunna's role as the southern hub, with the service originating from the community itself, is undermined by a persistent 18-place gap, with only 20 licensed places against demand for 38, leaving little buffer for growth or change.

Assumptions:

- Tasmania educator-to-child ratios applied are:
 - 0-24 months — 1 educator : 4 children
 - 24-36 months — 1 educator : 5 children
 - 36+ months — 1 educator : 10 children
- Children optimally require at least 4 days of care
- Average educator to child ratio is 1:7

Part B: East Coast ECEC & OSHC Demand Summary

East Coast childcare demand is uneven, with major shortfalls in St Helens, St Marys, Bicheno and Swansea, leaving families reliant on overstretched hubs and limited local options

Section Summary



The demand analysis shows that current ECEC & OSHC services **do not fully meet family needs today, with the sharpest gaps in St Helens, St Marys, Triabunna, Bicheno, and Swansea.**

Reliance on single providers and regional hubs forces families to travel long distances or go without care, leaving many inland and coastal towns underserved.

Looking ahead, by 2029 a significant expansion of places, new service models, and stronger regional planning will be required to ensure services can keep pace with demand.

St Helens is overstretched

As the regional anchor, it faces a persistent shortfall of ~40 licensed places, absorbing demand from multiple towns.

St Marys is under-resourced

A 10 licensed place centre with strong enrolments from Scamander and surrounding towns. A shortfall of +19 places highlights need for expansion.

Bicheno and Swansea face critical gaps

Both towns rely on single services; shortfalls of 15–17 places leave families without alternatives.

Triabunna requires expansion

Demand exceeds current and future supply, small demographic shifts could further exacerbate shortages.

Access is uneven across the region

Families in towns like Scamander, Coles Bay, and Orford travel 20–30 minutes for care, showing gaps in local service coverage.

OSHC shortfalls are widespread

Services in Swansea and Triabunna are particularly stretched, leaving school-aged care unmet.

Part B: East Coast ECEC & OSHC Summit 2025 Overview

The summit brought together over 30 stakeholders to validate findings and co-design solutions for strengthening ECEC & OSHC across the East Coast

Methodology

Purpose

- The East Coast ECEC & OSHC Summit (27 August 2025, Swansea) was convened to validate demand projections and co-design solutions with local and state stakeholders.
- Participants tested the Needs Analysis findings against local service realities and provided guidance on strategic priorities.

Approach

- NMC presented key findings on demographics, enrolments, and workforce data.
- Two rounds of group discussions explored challenges and potential solutions, structured around a four-pronged framework: infrastructure, capacity, location & service delivery, and workforce.
- The summit concluded with a final discussion focused on key takeaways and practical steps to bring the strategies to life.



Attendees

Over 30 participants attended, representing a diverse mix of stakeholders across the ECEC & OSHC sector, including:

- **Councils** – Break O'Day, Glamorgan–Spring Bay
- **State Government** – DECYP, State Growth, Skills Tasmania
- **Providers** – Thrive, Lady Gowrie, Building Blocks / Fingal Neighbourhood House
- **Training bodies** – CUC Eastern Tasmania, TasTAFE
- **Schools & community** – St Marys District School, Swansea Primary, Neighbourhood Houses, NDIS, B4 Early Years Coalition.



East Coast ECEC & OSHC Summit 2025

The summit demonstrated the value of bringing diverse stakeholders together — validating data with lived experience and confirming a shared commitment to finding practical, regionally tailored solutions for ECEC & OSHC.

Sources:

- East Coast ECEC & OSHC Summit 2025 Participation Notes

Part B: East Coast ECEC & OSHC Summit 2025 Summary

The summit validated critical challenges in capacity, infrastructure, and workforce, while co-designing practical solutions to strengthen ECEC & OSHC across the East Coast

Section Summary



The summit confirmed that capacity gaps, infrastructure limits, and workforce shortages are the most pressing barriers to ECEC & OSHC. Participants highlighted smaller, flexible builds, stronger local training pipelines, and coordinated regional planning as practical solutions, underscoring the need for collective action to secure liveability and growth on the East Coast.

Capacity gaps remain the most pressing issue

St Helens, St Marys, Bicheno, and Swansea all need major expansion to meet demand.

Infrastructure is constrained

Funding, land, and transport barriers prevent services from scaling.

Workforce shortages persist

Low pay, high attrition, and weak training pathways limit service growth.

Flexible service delivery is key

Smaller centres, co-location with schools/health, and multipurpose hubs fit rural needs.

Local pipelines must grow

Better pay, continued mentoring, and training via Lady Gowrie, TasTAFE, and CUC are essential.

Regional coordination is critical

A supply/demand roadmap and partnerships are needed to align services with housing and population growth.

Part B: East Coast ECEC & OSHC Workforce Recommendations

Locally targeted strategies are key to sustaining the East Coast early years workforce

NMC Early Years Workforce Profiles

NMC has undertaken extensive research into the early years workforce, engaging over **200+ survey respondents**, **50+ service providers** and stakeholders across **seven LGAs**. From this work, NMC developed **three key workforce profiles** to guide targeted recruitment and retention strategies in the ECEC and OSHC sectors.



Early Career (16–30 years)

- Trainees and young adults without dependents seeking full-time work and career development.
- Attracted by training pathways, supportive environments, and regular hours.
- Leave due to workload, low pay, and unmet role expectations.

Note: 16–18 year olds only if trainees.



Mid-Career (35–46 years)

- Return-to-work parents seeking part-time, local roles.
- Value flexibility, community contribution, and alignment with school hours.
- Leave due to high workload, low pay, and poor workplace culture.



Latter Career (46+ years)

- Experienced, often part-time educators nearing retirement.
- Value flexibility, local work, and community impact.
- Leave due to physical demands, workload pressures, and retirement.

Workforce Strategies

These strategies are designed to effectively support the three NMC early years workforce profiles by addressing their unique recruitment, career development, and retention needs within local communities.

Focus on Local Recruitment	Prioritise hiring within the township to reduce travel-related attrition.
Workforce Pipelines	Expand school traineeships and subsidised Certificate III programs with a focus on local coordination and delivery.
Life Stage Roles	Offer flexible rostering and lighter or mentoring roles for parents and older educators.
Induction & Mentoring	Provide structured onboarding, realistic job previews, and peer support.
Flexible Service Models	Use multi-age "Family Grouping" to ease staffing pressures in small teams.
Retention Barriers	Partner on affordable housing and recognise long service and community contribution.

Part B: Future Workforce Requirements

St Helens and Triabunna need more educators by 2029, Bicheno has a surplus, and Swansea's staffing meets projected demand

Future Workforce Requirements (2029)

NMC conducted an analysis to determine the staffing needed to meet projected future enrolments. The majority East Coast local ECEC/OSHC centres have high demand and include St Helens, Bicheno, Triabunna, Swansea and St Marys.

Location	Current Licensed Places (2025)	Optimal Licensed Places (2029)	Additional Licensed Places (2029)	Current Number of Educators (2025)	Optimal Number of Educators (2029)	Additional Educators to Meet Demand (2029)
St Helens	66	106	+40	16	26	+10
Bicheno	32	49	+17	12	14	+2
Triabunna	40	38	+18	7	10	+3
Swansea	28	46	+18	9	12	+3
St Marys*	10	29	+19	7	10	+3

Refer to Appendix C for full future workforce requirements methodology

Please see Part A of this document for detailed St Marys forecasting

- **St Helens:** Current staffing of 16 educators is insufficient for projected demand, which requires 26 full-time educators by 2029. A gap of 10 educators reflects ongoing capacity pressures and underscores the need for workforce expansion to meet safe staffing ratios.
- **Bicheno:** With 12 current educators and a projected need for 14, a small gap of 2 educators exists. While demand is more manageable than St Helens, minor increases in staffing are needed to fully meet future enrolments.
- **Triabunna:** Current staffing of 7 educators aligns with the projected need of 10, indicating a medium workforce gap. The service is requires further resources for both current and future enrolments.
- **Swansea:** 9 Current educators are insufficient for the projected 12 required by 2029, leaving a gap of 3 educators. Combined with high enrolment pressures, this highlights an urgent need for workforce growth.
- **St Marys:** Current staffing of 10 educators is below projected demand, which requires 13 full-time educators by 2029. A shortfall of 3 educators reflects the persistent gap of 16–29 licensed places and highlights the need for workforce expansion to meet safe staffing ratios.

St Helens, St Marys and Swansea face the most urgent workforce pressures, each requiring 3–10 additional educators by 2029. Bicheno and Triabunna show smaller gaps of 2–3 staff, but still need targeted growth to ensure safe ratios and maintain service stability across the coast.

Assumptions:

- Tasmania educator-to-child ratios applied are:
 - 0-24 months — 1 educator : 4 children
 - 24-36 months — 1 educator : 5 children
 - 36+ months — 1 educator : 10 children
- Children optimally require at least 4 days of care
- Average educator to child ratio is 1:7

Part B: East Coast ECEC & OSHC Workforce Summary

The East Coast ECEC & OSHC workforce is small, highly localised, and under pressure from low pay, high attrition, and poor training completion rates, despite being upheld by dedicated educators

Section Summary



The workforce analysis shows that the current ECEC & OSHC workforce **does not have sufficient capacity or qualification depth to meet future demand.**

Small teams, limited Bachelor-qualified staff, and high attrition constrain service viability, despite strong commitment from local educators.

By 2029, **St Helens, St Marys and Swansea carry the greatest workforce strain**, with demand for 3–10 extra educators by 2029. Bicheno and Triabunna have smaller shortfalls of 2–3 staff, but still require careful investment to uphold safe staffing ratios and sustain stable service delivery.

Small, fragile teams

Most centres operate with 5–7 educators, creating vulnerability to staff absences and limiting capacity to expand.

Limited bachelor qualified staff

The region relies heavily on Certificate III and Diploma staff, with only two Bachelor-qualified teachers across all sites.

Recruitment and retention challenges

Low pay, high workload, and housing and transport barriers drive attrition and make it hard to build a stable workforce.

Reliance on local and commuting staff

While 76% of staff travel under 20 minutes, towns like Bicheno depend on long-distance commuters, exposing services to disruption.

Training pathways exist but completions are low

Providers such as Lady Gowrie, TasTAFE, and CUC offer traineeships and mentoring, but qualification completion rates remain very low.

Future workforce gaps are significant

By 2029, St Helens will need +10 educators, St Marys +3, Triabunna +3 and Swansea +3, underscoring urgent growth needs in key hubs.

Part B: Site & Service Model Recommendations

Three sites & service models have been prioritised based on demand, site, employment, and training

Recommendations

Please see Part A for the St Marys new build recommendation, driven by limited infrastructure and significant unmet demand.

Priority 1	St Helens St Helens is the region's anchor service and employment hub.	School Co-Located (Via Expansion) Early Learning Centre already opposite the District High School and a CFLC nearby, providing strong integration opportunities. 	40+ Places By 2029 The largest shortfall in the region, with enrolments already at capacity and families reporting difficulty accessing care.
Priority 2	Swansea Swansea is a smaller but stable community with limited local services.	School Co-Located (Via New Build) Lady Gowrie childcare is ~500 m from the school; closer integration would require a new facility on or adjacent to the school site. 	18+ Places By 2029 Services are already stretched, and population growth will intensify pressure on limited local options.
Priority 3	Bicheno Bicheno is a tourism-driven economy with seasonal service pressures.	School Co-Located (Via Expansion) Little Penguins childcare already sits next to the Primary School, offering a natural co-location pathway. 	17+ Places By 2029 While numbers are smaller, demand regularly exceeds supply during peak tourism seasons, leaving local families with limited options.

Please note: Triabunna was not prioritised, as Bicheno was elevated due to its broader catchment (including Coles Bay), persistent shortfalls, and lack of nearby alternatives—making expansion more critical for regional access and family stability.

Part B: Site & Service Model Option Assessment

Assessment of St Helens, Bicheno, and Swansea, confirming school co-location as the preferred model

Assessment

The assessment applies this framework to St Helens, Bicheno, and Swansea, comparing demand, site options, economic role, and training access. It highlights relative strengths and sets out school co-location as the preferred model in each township.

 Impact of Criterion	Criterion	Priority 1: St Helens	Priority 2: Swansea	Priority 3: Bicheno
	Unmet Demand (2029)	High – Largest demand gap (+40 places; ~+10 educators by 2029).	Moderate–High – Gap of ~+18 places; ~+3 educators required.	Moderate – Gap of ~+17 places; ~+2 educators required.
	Site Suitability & Land Use	High – Early Learning Centre already opposite the high school; CFLC nearby; expansion most feasible.	Medium – Lady Gowrie ~500 m from the school; co-location would require new build adjacent to school.	High – Primary school and Little Penguins childcare located on the same land; natural co-location.
	Employment Hubs & Economic Role	High – Largest township; strong regional service and employment hub.	Moderate – Small township; limited service role but stable growth.	Moderate – Smaller permanent base; tourism economy; seasonal demand pressures.
	Access to Training Hubs	Medium – ~2 hrs to Launceston; moderate accessibility to training and placements.	Low–Medium – ~2 hrs to Hobart; still distant but somewhat better access.	Low – ~2.5 hrs to Hobart; weaker link to training pathways.
	Recommended Delivery Model	School co-located via expansion (build on existing ELC and CFLC proximity).	School co-located via new build adjacent to school (not possible to rely on existing Lady Gowrie site 500 m away).	School co-located via expansion/partnership with Little Penguins.

Part B: East Coast Regional Service Model & Site Identification Summary

St Helens, Swansea, Bicheno, and St Marys are prioritised for school-co-located expansion by 2029, while Triabunna is not elevated due to Bicheno's broader catchment and regional role

Section Summary



The site identification process confirms that **St Helens, Swansea, Bicheno, and St Marys should be prioritised for expansion through school co-located models**, reflecting the balance of 2029 demand, feasibility, and community access.

Triabunna, while showing demand growth, was not elevated above Bicheno due to its smaller catchment and the broader regional role played by Bicheno and Coles Bay. Together, these four towns provide a clear roadmap for targeted infrastructure investment and sustainable service delivery on the East Coast.

School co-location is the preferred model

Offers continuity between early learning and schools, supports OSHC delivery, and maximises use of existing infrastructure.

St Marys is High Priority (See Part A)

Recommendation included in Part A due to its unique infrastructure constraints and significant unmet demand.

St Helens is high priority

Requires ~+40 additional places and ~+10 educators by 2029; as the largest hub, it anchors regional access and employment.

Swansea is medium priority

Needs ~+18 places and +3 educators; a new school-adjacent build is recommended to address limited existing options.

Bicheno is medium priority

Requires ~+17 places and +2 educators; existing co-location with Little Penguins and the Primary School provides a natural pathway.

Triabunna is lowest priority

Despite a shortfall of +18 places, it was prioritised below Bicheno, which serves a broader catchment including Coles Bay with no alternatives.

ABOUT THE PROJECT



1.1 Background, Key Challenge & Question

The project aims to create a sustainable ECEC & OSHC model for St Marys and the East Coast to close service gaps, support jobs, and strengthen the community



Background

The St Marys and East Coast ECEC & OSHC Needs Analysis, led by Break O'Day Council (BODC) and supported by the Tasmanian Government, aims to address critical gaps in early childhood education and care (ECEC) & outside school hours care (OSHC) services. Limited access to these services is a major barrier to workforce participation and regional growth. This two-part project will assess the need for a new facility in St Marys and expand the analysis to the East Coast region.



Key Challenge

Access to quality ECEC & OSHC remains a major challenge for families in St Marys and the East Coast, limiting employment and education opportunities. Service gaps, workforce shortages, and financial constraints hinder expansion. Sustainable solutions require a clear understanding of demand, service models, funding, and site feasibility, necessitating collaboration across government, providers, and the community.

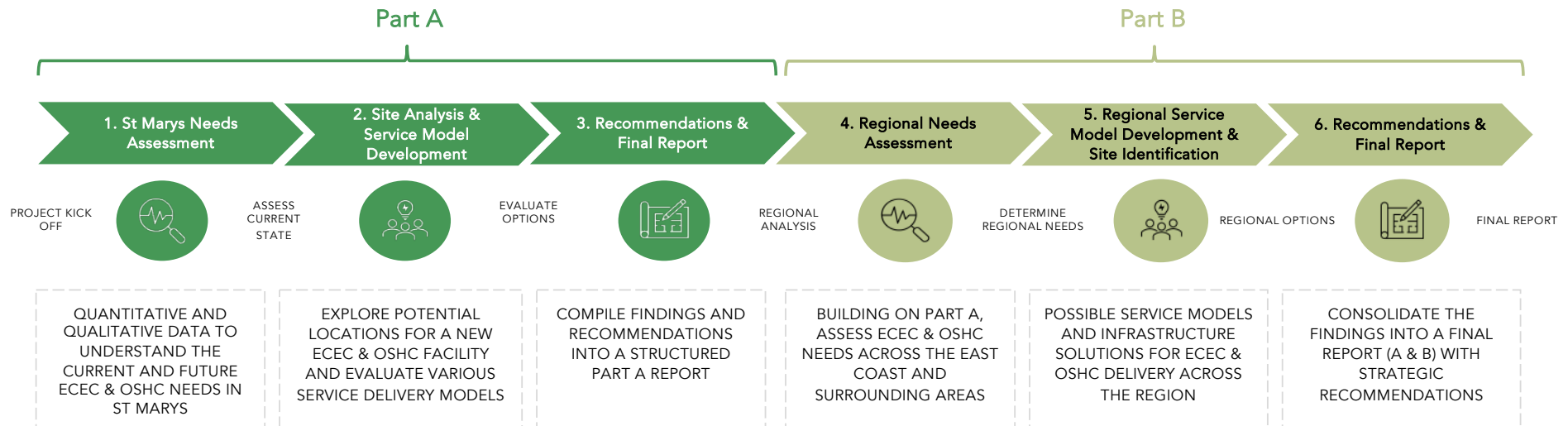


Key Question

How can a sustainable and accessible ECEC & OSHC model be developed for St Marys and the East Coast region to meet current and future demand, support workforce participation, and enhance community well-being while ensuring long-term economic viability?

Please note: While a key part of education and care, **Family Day Care** is not available on the East Coast and was excluded from deep analysis.

Recommended Approach



1.2 Break O'Day Community Youth Commitment Statement



Supporting Our Youth, Building Our Future

"We, the people of Break O'Day, recognise the vital role that young people play in shaping our community's present and future. We are committed to fostering an inclusive and supportive place to live where every young person can reach their full potential".

Declaration

"We declare our unwavering dedication to the present and future success of our young people. Together, we will strive to create a community where every young person feels valued, safe, and supported to thrive".

**Signed and endorsed by
community members of
Break O'Day.**



Community Commitment

Youth Voice

We commit to actively seeking and valuing the voices of young people, and ensuring they are aware of opportunities to participate in community decision-making processes.

Our community will promote, establish, or nurture channels for youth to express their ideas, concerns, and visions for our future.

Supporting Self-Empowerment

We commit to supporting young people in growing their knowledge, skills, and access to resources to become confident, resilient, and engaged citizens.

Our community will provide opportunities for leadership, learning, and personal growth.

Inclusivity

We commit to embracing the diversity of young people in our community, respecting their unique backgrounds, identities, and perspectives.

Our community will be inclusive, welcoming, and free from discrimination.

Equity

We commit to ensuring that all young people have access to basic needs such as shelter, food, clothing, and material support.

Our community will work collaboratively to support youth in need or at risk and advocate for youth-centred services.

Safety

We commit to upholding the safety and wellbeing of our young people in alignment with the UN Convention on the Rights of the Child and the Tasmanian Child and Youth Safe Framework.

Our community will provide welcoming, safe environments where youth can learn, play, and grow without fear.

Education

We commit to supporting access to quality education and lifelong learning opportunities for all young people.

Our community will promote educational equity and foster a culture of continuous learning.

Mental Health and Wellbeing

We commit to promoting mental health awareness, supporting wellbeing, and breaking down stigma.

Our community will advocate for and facilitate access to mental health services and resources for youth.

Employment and Economic Opportunity

We commit to fostering pathways to employment, career development, and economic stability for young people.

Our community will support, promote, or create job opportunities and training programs tailored for youth.

Recreation and Arts

We commit to providing safe and vibrant spaces and opportunities for youth to participate in arts, recreation, and cultural activities.

Our community values creative expression and celebrates the contributions of young people to our cultural life.

Community Participation

We commit to engaging in activities and efforts that support young people and their families.

Our community will build partnerships with families, schools, local businesses, and services to support youth development.

Accountability

We commit to regularly assessing our progress, being transparent, and welcoming feedback.

Our community is committed to learning, growing, and doing our best for young people.

1.3 Eastern Strategic Regional Partnership

The St Marys and East Coast Childcare Needs Analysis supports the Eastern Strategic Regional Partnership's goals by addressing ECEC & OSHC & ECEC access as a key driver of livability, workforce participation, and sustainable regional development

Alignment with the Eastern Strategic Regional Partnership

The St Marys and East Coast Childcare Needs Analysis is closely aligned with the goals of the Eastern Strategic Regional Partnership (ESRP) between Industry Sector Representatives and Associations, Local Government and the Tasmanian Government. This partnership brings together local and state government, industry, and community stakeholders to deliver practical, coordinated solutions to regional challenges, including population retention, workforce access, and service provision.

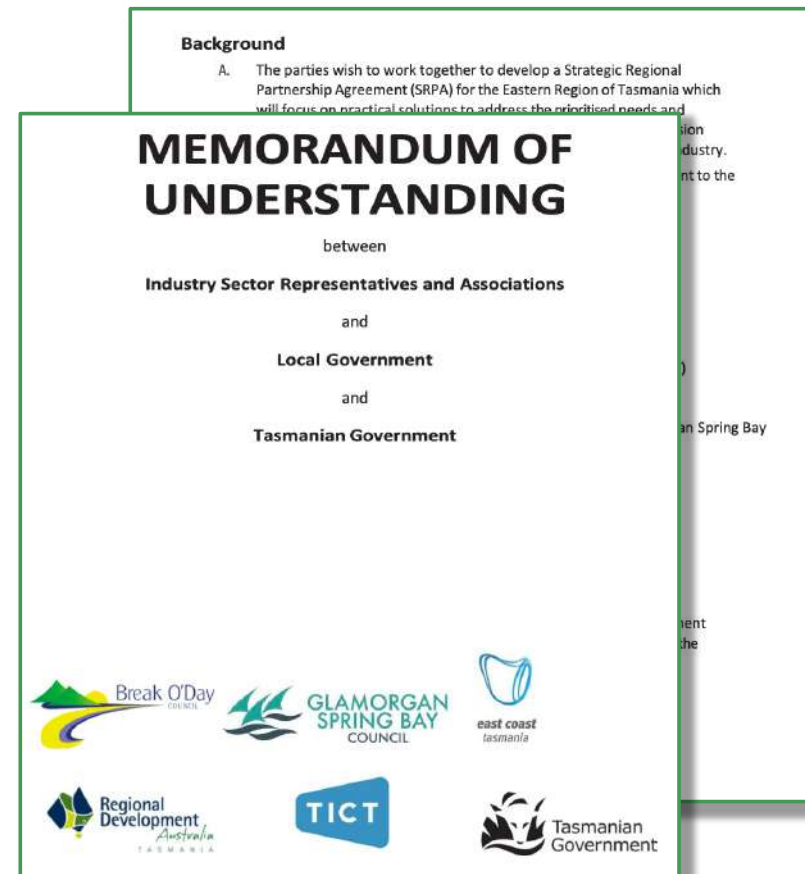
ESRP Key Objectives:

- Develop a long-term strategic regional plan focusing on areas such as health, housing, infrastructure, and economic diversification.
- Enhance liveability and sustainability for communities in Eastern Tasmania.
- Support workforce development and attract new residents to the region.

Improving access to early childhood education and care is central to the region's liveability and long-term sustainability — both of which are core ESRP priorities. The project addresses these by identifying service gaps, informing future infrastructure investment, and supporting workforce participation for families living in rural and remote areas.

The project's focus on data-driven planning, community-led engagement, and identification of collaborative service models complements the ESRP's broader approach to strategic regional development. It also contributes directly to shared regional goals such as building community resilience, enhancing wellbeing, and supporting a more diverse and sustainable local economy.

As a tangible early action under the ESRP framework, the project demonstrates how place-based planning can inform long-term decision-making and strengthen the case for targeted government investment in the east coast of Tasmania.



1.4 Drivers & Policy of ECEC & OSHC

Coordinated actions across state, national, and local levels can support children, families and workforce

ECEC & OSHC Impact



Improves lifelong outcomes

ECEC builds foundational skills, social development, and school readiness, with benefits lasting into adulthood.



Supports families & workforce participation

OSHC and flexible ECEC allow parents and carers to work, train, or study — essential for regional economic participation.



Drives regional liveability

Access to reliable early learning and OSHC services is a key factor in attracting and retaining families in rural communities.



Addresses equity gaps

Accessible, affordable services reduce developmental disparities for children in disadvantaged or remote areas.

Policy Alignment & Drivers

- **State population & liveability focus:** Tasmania's Population Policy (July 2024) prioritises liveability, people & skills and infrastructure to support families — including targeted early years actions to attract and retain families in regional communities.
- **Tasmanian Early Learning Initiative (Working Together: Supporting Early Learning and Early Learning for Three Year Olds)** – The Early Learning for Three Year Old's (EL3) initiative aims to increase access to early learning for young children in Tasmania. EL3 complements the Working Together – supporting early learning program (Working Together) that supports children and families who may experience additional barriers to access and participation in early childhood education and care services.
- **What communities told government:** co-design engagement (DECYP "What we heard") stresses accessibility, flexible local delivery and that cost/transport/workforce are primary barriers — exactly the problems this analysis addresses.
- **National priorities — quality & workforce:** the Australian Governments' National Children's Education & Care Workforce Strategy (Shaping Our Future) and the National Quality Framework emphasise a skilled, sustainable workforce and high-quality settings to improve child outcomes and support parental workforce participation.
- **Local workforce action & alignment:** ECATas and local evidence highlight severe educator shortages and low local training completions; this project's recommendations for place-based infrastructure, workforce pipelines and training supports directly align with those workforce actions.

Early childhood education, care, and OSHC support children's development, family workforce participation, and regional liveability. This project aligns with Tasmanian and national priorities, addresses community calls for accessible, flexible, affordable services, and tackles local educator shortages and training needs.

1.5 Key Terms

Key terms and acronyms used throughout the document

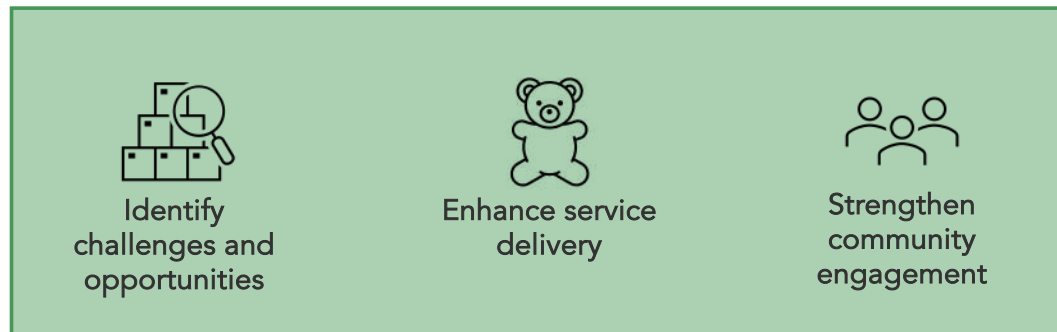
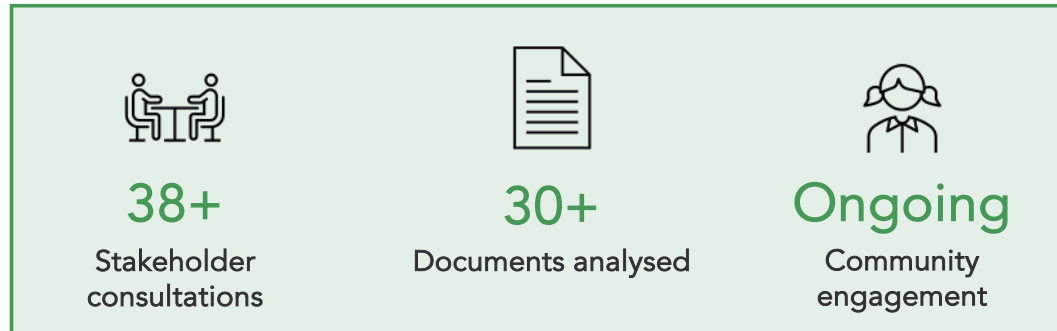
Please note: the names and acronyms referenced throughout this document are used in accordance with the definitions provided above.

Acronym	Name	Description
BODC	Break O'Day Council	The lead local government authority overseeing the St Marys and East Coast Childcare Analysis.
GSBC	Glamorgan-Spring Bay Council	A neighbouring council collaborating on the regional component of the project through the Eastern Strategic Regional Partnership.
ECEC	Early Childhood Education and Care	The structured delivery of social, emotional, physical, personal, creative, and cognitive learning to children aged 0 to school age , provided by qualified educators within a formal learning framework. Quality ECEC supports healthy early childhood development and prepares children for school.
EC	Education and Care	Combined provision of education and care for children between the birth to 12 ages .
OSHC	Outside School Hours Care	A key service type included in the project to support school-aged children and working families before and after school.
FDC	Family Day Care	A flexible, home-based care model being considered as part of the broader mix of ECEC & OSHC solutions for rural and remote areas.
OC	Occasional Care	Occasional care is a non-regular, ad hoc education and care service (usually for children under 13) provided for a fee when parents are not onsite, typically allowing flexible short-term care outside of regular long day care arrangements.
LDC	Long Day Care	A centre-based ECEC service offering full-day care and education for children aged 0–5.
LGA	Local Government Area	The defined geographic areas (Break O'Day and Glamorgan-Spring Bay) within which service demand and delivery options are being analysed.
EL3	Early Learning For Three-Year-Old Initiative	Five EL3 Trial Sites are being established in areas where there is low or no capacity of existing ECEC services including the Break O'Day/Glamorgan-Spring Bay Local Government Areas.
ESRP	Eastern Strategic Regional Partnership	Contains a number of strategic and infrastructure projects including the needs analysis and site investigation in relation to ECEC & OSHC at St Marys.
DECYP	Department of Education, Children and Young People	The Tasmanian Government department supporting early learning policy, program funding (e.g. Working Together), and alignment with broader education reforms in the St Marys project.
BODEC	Break O'Day Employee Connect	Regional Jobs Hub initiative, covers all of Break O'Day and the northern part of GSB.
NQF	National Quality Framework	The national system that sets standards for ECEC service quality, informing planning for any new service established in St Marys.
CFLC	Child and Family Learning Centre	While there is no CFLC in St Marys, the model (as seen in St Helens) is informing recommendations on how integrated health and family services could be co-located with ECEC & OSHC services.
ELS	Early Learning Service	A centre-based early childhood education and care service, typically catering to children aged birth to five years, including preschool-age children.

1.6 Methodology

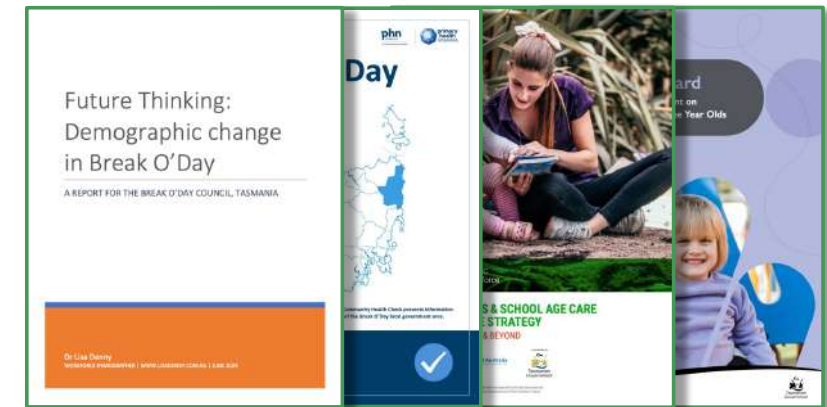
The St Marys and East Coast Childcare Needs Assessment combined data analysis and community input to identify gaps and opportunities to improve ECEC & OSHC access and support for families

Inputs and Outputs



NMC & Lady Gowrie Tasmania

NMC & Break O'Day Council



The St Marys and East Coast Childcare Needs Assessment combined data analysis, service mapping, and extensive community engagement to identify access gaps, workforce challenges, and opportunities to improve ECEC & OSHC delivery and family support.

1.7 Data Methodology

An in-depth understanding of the St Marys and East Coast Childcare Needs Assessment through comprehensive data analysis from key sources

Methodology

A thorough analysis of existing practises and data was undertaken to assess the ECEC & OSHC needs in St Marys and East Coast. This analysis helped identify key trends, gaps, and opportunities, providing valuable insights prior to engagement with the community.

Purpose

- Assess the current state including service provision
- Identify key trends, gaps, and opportunities for improvement
- Establish a robust foundation of evidence to inform strategic planning and decision-making for the St Marys and East Coast Childcare Needs Analysis

Approach

- **Data Collection:** Gathering relevant datasets from the identified sources
- **Data Validation:** Ensuring the accuracy, relevance, and timeliness of the data
- **Trend Analysis:** Examining historical and current trends to highlight patterns

Outcome

The findings from the data analysis established a strong foundation to engage with the community, providing a clear understanding of ECEC & OSHC needs in St Marys and East Coast and guide meaningful discussions which consider community needs and aspirations.

Sources

A range of existing data sources were utilised to conduct a comprehensive needs assessment. Key resources included:

- **Council Strategies and Reports:** Insights into past and current priorities, policies, and outcomes
- **Tasmania Strategies and Reports:** Early learning and population information
- **Economy ID:** Detailed demographic, economic, and social data specific to the region
- **Australian Bureau of Statistics (ABS):** National-level data providing benchmarks and broader context
- **Health care data:** Tasmania PHN (PHT) data
- **Lisa Denny Future Thinking Demographic Change Report:** Break O'Day specific demographic information
- **Thrive Group & Lady Gowrie Tasmania:** Region specific supply and demand data



The data methodology involved a comprehensive analysis of multiple data sources to assess the ECEC & OSHC needs in St Marys and East Coast, identify trends and gaps, and establish an evidence base to inform future planning and community engagement.

1.8 Consultation Methodology

NMC engaged stakeholders through 1:1 consultations to validate data insights, uncover valuable perspectives, and understand the needs of ECEC & OSHC and services along the Tasmanian east coast

Methodology

NMC conducted over 38 one-on-one consultations with key stakeholders during the engagement phase. These consultations were instrumental in validating insights derived from the data analysis and identifying key focus areas for inclusion in the St Marys and East Coast Childcare Needs Assessment.

Purpose

- Deepen understanding of stakeholder perspectives and priorities
- Identify 'Gold Nuggets' of information that provide unique insights and add significant value to the project
- Validate findings from data analysis to ensure alignment with community realities
- Co-design focus areas and actionable strategies to address identified gaps and opportunities

Approach

- Tailored, one-on-one discussions with a diverse cross-section of stakeholders
- Open-ended questions to encourage detailed input and foster meaningful dialogue
- Data-informed discussions to bridge findings with lived experiences

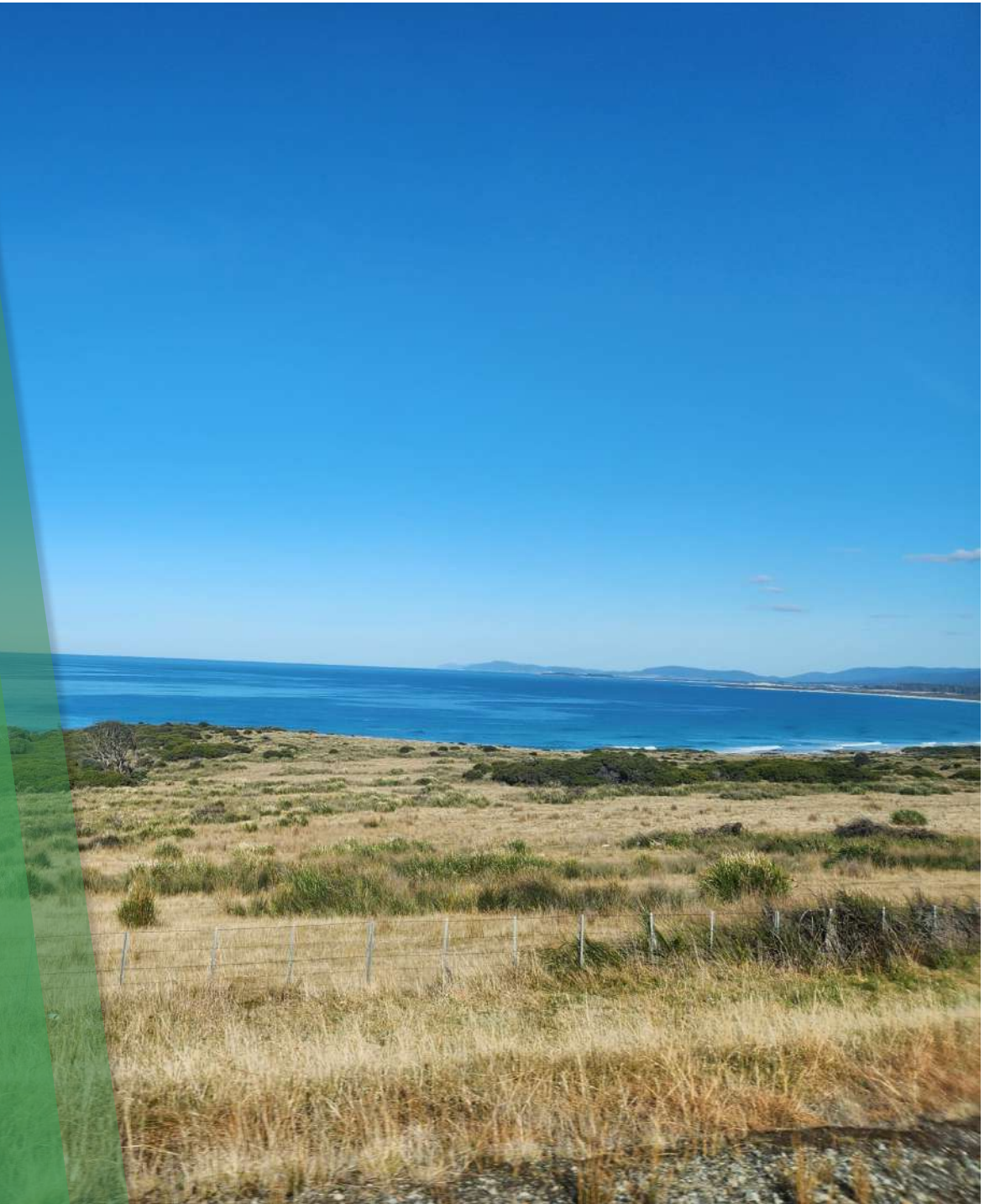
Outcome

The consultations provided critical qualitative insights, ensuring the Plan reflects the needs and aspirations of diverse stakeholders. This process built a foundation for a community-driven and inclusive approach to strategic planning.



NMC conducted over 38 one-on-one stakeholder consultations to validate data insights, capture diverse community perspectives, and co-design actionable strategies addressing ECEC & OSHC needs and service gaps along Tasmania's east coast.

PART A: ST MARYS DEMOGRAPHIC ANALYSIS



2.1 St Marys Needs Assessment Overview

Part A includes a comprehensive assessment of current and future ECEC & OSHC needs in St Marys to inform service models, workforce opportunities, funding options, and potential site development

Methodology

This section outlines the structure and purpose of Part A of the St Marys & East Coast Childcare Needs Analysis. It sets out the evidence base and approach used to assess current and future ECEC & OSHC needs, identify and evaluate potential sites, and develop recommendations for future service delivery and investment.

Purpose

Assess the ECEC & OSHC needs in St Marys and understand future service needs and requirements, identify and evaluate potential new site and recommend future service delivery model and funding sources/opportunities

St Marys Needs Assessment

Establishes the social, demographic, and economic context for St Marys and the Break O'Day region and helps identify the underlying factors influencing ECEC & OSHC demand and family needs.

BOD & St Marys Demographic Analysis

- Population
- Household
- Workforce
- Economic

ECEC & OSHC Service Models

- Current services
- Programs
- Delivery models

Future Service Requirements

- Future demand
- Future service needs

St Marys Future Service Requirements

Identifies and assesses potential locations for a future ECEC & OSHC facility and aligns service models with community needs, workforce access, and co-location opportunities.

Site Analysis & Evaluation

- Evaluation lenses
- Risk lenses
- Finance lenses

Future Service Model & Funding

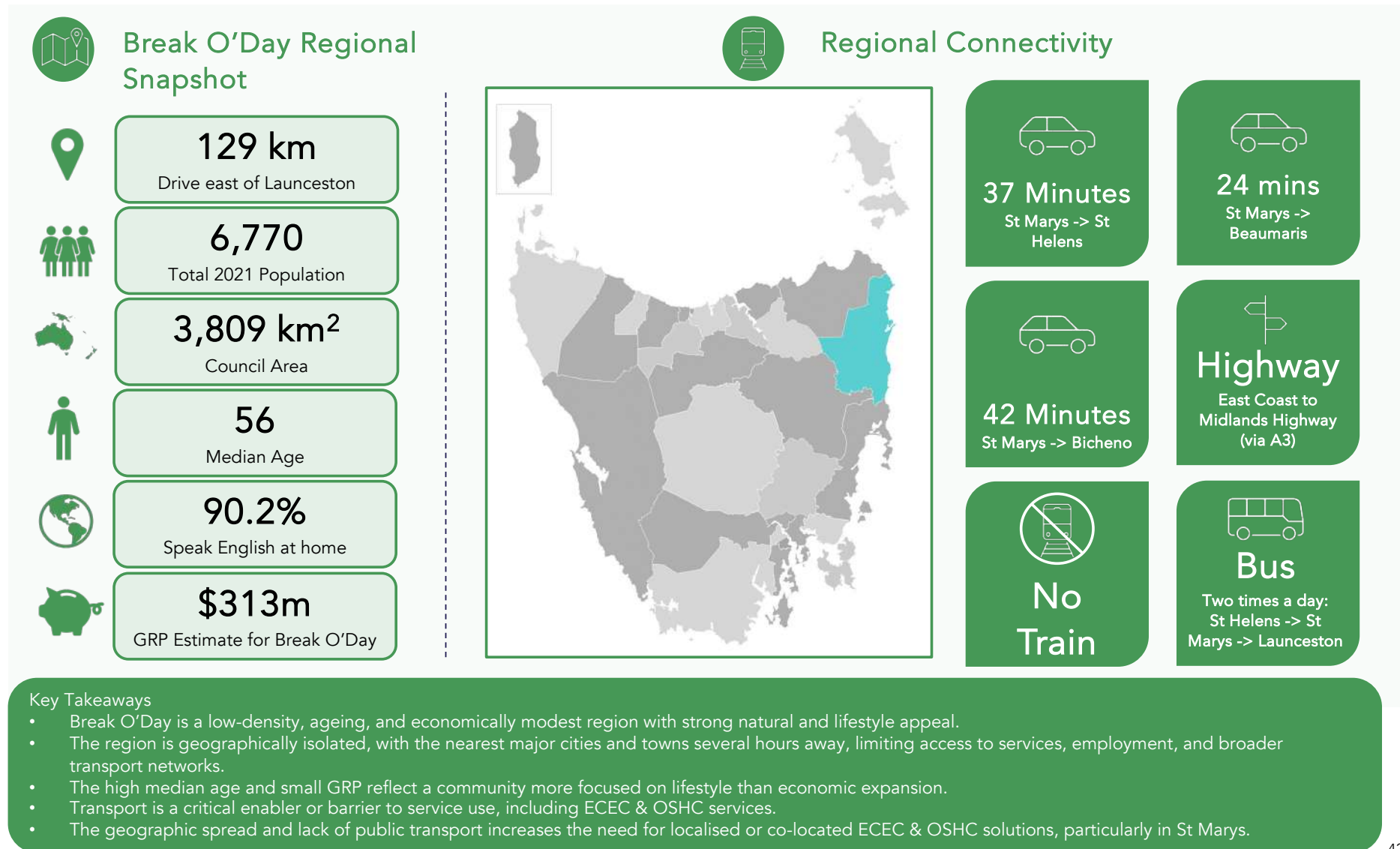
- Future service model
- Funding pathways

Recommendation

- A recommendation informed by all Part A findings, encompassing the proposed scope of works for a new facility, workforce development opportunities, potential service delivery models—including collaborative care approaches—and an analysis of existing and prospective funding options to support a sustainable service.

2.2 Break O'Day Regional Snapshot & Connectivity

The Break O'Day region in northeast Tasmania is an isolated, ageing, sparsely populated community with limited public transport, strong road links, and predominantly English-speaking residents



2.3 Break O'Day Overview By Township

Break O'Day is a geographically spread municipality where limited transport and service access create ECEC & OSHC challenges across six key townships, with St Marys as the central service hub



Break O'Day Township Breakdown

Break O'Day is a diverse municipality located on Tasmania's north-east coast, stretching from the inland Fingal Valley to the iconic Bay of Fires. It includes coastal and rural communities with varied access to services. While the region's natural beauty attracts families and retirees alike, its spread-out population and limited public transport create challenges for equitable ECEC & OSHC access.

This project focuses on six key townships within the Break O'Day local government area that are relevant to the St Marys ECEC & OSHC catchment:

- St Marys – the central inland township and location of the main existing ELS service.
- St Helens – the largest town and regional services hub, located on the coast.
- Fingal – a rural township supported by the Fingal Valley Neighbourhood House and the Building Blocks mobile preschool program, which delivers occasional care on Mondays and Tuesdays.
- Scamander – a popular coastal community with no local ECEC & OSHC services.
- Mathinna – an isolated rural area with limited access to early childhood services.
- Cornwall – a small settlement located just 7 km from St Marys.



Break O'Day LGA Entrance



Break O'Day LGA Map

Township	Distance to St Marys	% of Break O'Day Population (2021)
Cornwall	7 km	1.2% (82 people)
Scamander	18 km	11.9% (803 people)
Fingal	28 km	6.4% (431 people)
St Helens	36 km	23.2% (1,573 people)
Mathinna	65 km	2.0% (134 people)
St Marys	N/A	10.9% (738 people)

Sources:

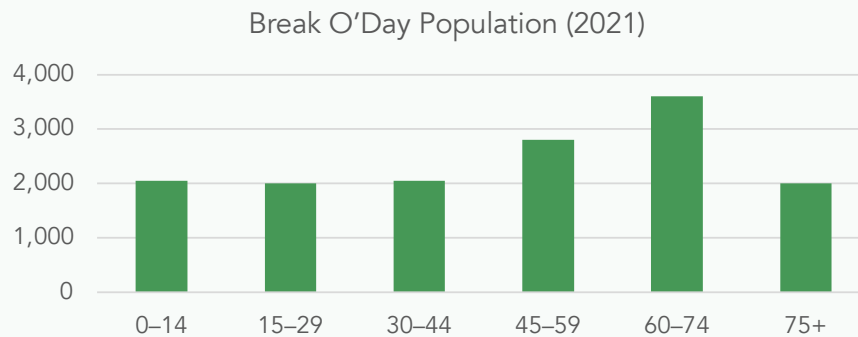
- Australian Bureau of Statistics
- Building Blocks Mobile Preschool
- Break O'Day Council Prospectus
- Fingal Valley Neighbourhood House

2.4 Population By Age Group

St Marys is likely to experience continued population ageing and a decline in younger cohorts, mirroring regional trends, highlighting the need to plan for older residents while attracting working-age families



Break O'Day Population by Age Group



Age Group	2016	2021	2036 (Projected)	% Change (2021–2036)
0–14	2,200	2,050	1,950	-11%
15–29	2,000	2,000	1,500	-25%
30–44	1,900	2,050	2,200	+16%
45–59	3,000	2,800	2,700	-10%
60–74	3,100	3,600	3,300	+6%
75+	1,500	2,000	3,200	+113%

Sources:

- Australian Bureau of Statistics
- Tasmanian Population Projections (TasPOPP) 2024



St Marys Population Age Group

St Marys total population (2021): 738

Age Group	2016	2021	% Change
0-4	17	13	-23.5%
5-9	31	27	-12.9%
0-14	41	25	-39.0%
15-29	61	78	+27.9%
30-44	79	78	-1.3%
45-59	200	166	-17.0%
60-74	220	232	+5.5%
75+	61	85	+39.3%

- St Marys is experiencing population ageing, with strong growth in residents aged 75+ and modest growth in working-age adults (30–44).
- There has been a significant decline in children (0–14) and mid-life adults (45–59), reflecting regional trends.
- While the overall population remains stable, these shifts highlight increasing demand for aged care services alongside the need to attract and retain younger families to support community sustainability.

2.5 Aboriginal & Torres Strait Islander Population

An overview of the Aboriginal and Torres Strait Islander population and community



Break O'Day Aboriginal & Torres Strait Islander Population

Proportion of Population	2016	3.8%
	2021	4.4%
Population	2016	235 People
	2021	286 People

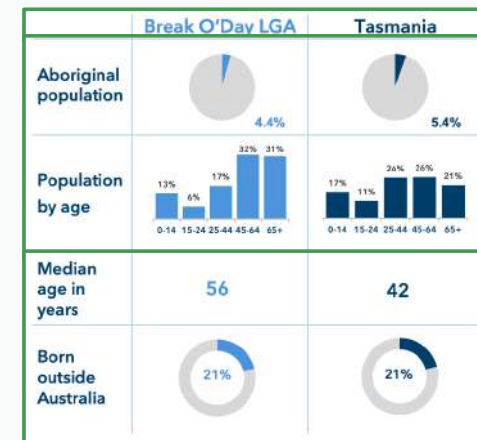
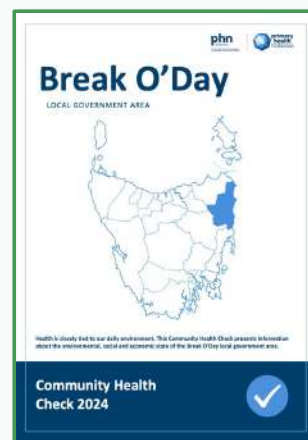
- **Growing Aboriginal & Torres Strait Islander population:**
 - Increased from 3.8% (2016) to 4.4% (2021); services should be culturally safe and inclusive.
- **Ageing community:**
 - Median age is 56 (vs 42 for Tasmania), indicating fewer young families.
- **Low child population:**
 - Only 13% are aged 0–14, suggesting lower overall ECEC & OSHC demand.
- **Equal cultural diversity:**
 - 21% born overseas, same as state average—some need for inclusive practices.
- **ECEC & OSHC implications:**
 - Focus on small scale, flexible and culturally responsive services, especially for Aboriginal/Torres Strait Islander and rural families.



St Marys Aboriginal & Torres Strait Islander Population

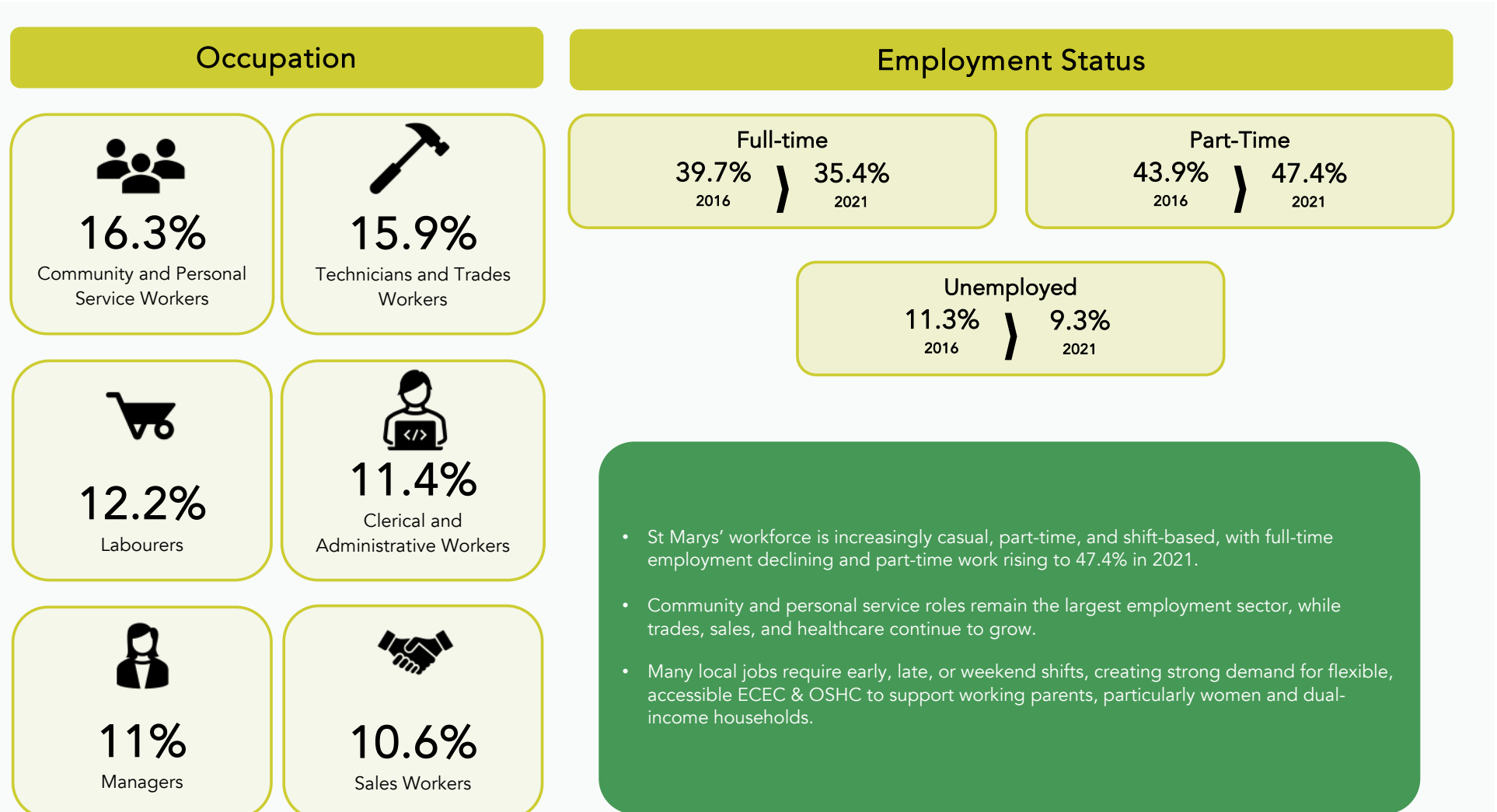
Median Age	2016	21 Years
	2021	56 Years
Population	2021	26 People

Ageing Population: The significantly higher median age indicates an ageing Aboriginal & Torres Strait Islander population in St Marys, which may have implications for healthcare, aged care services, and community support programs tailored to older residents.



2.6 St Marys Workforce

St Marys' workforce is increasingly casual, part-time, and shift-based, highlighting the need for flexible, accessible ECEC & OSHC to support participation in key industries like health, retail, and hospitality



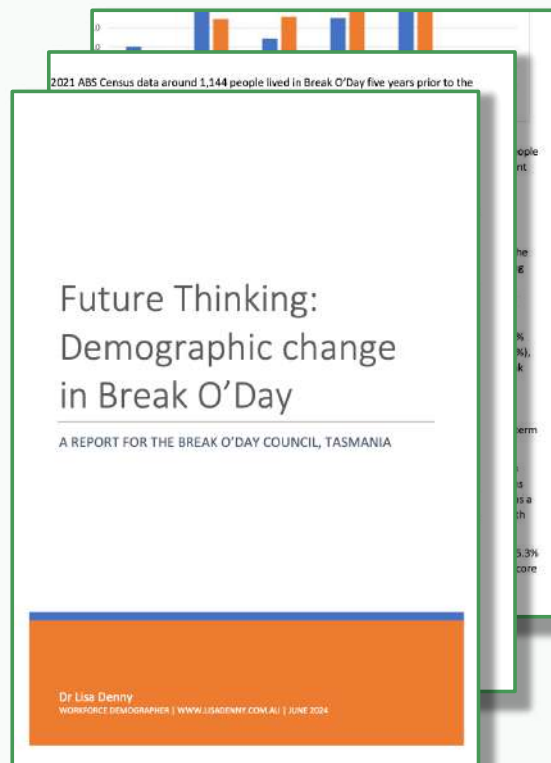
Sources:

- Australian Bureau of Statistics
- Tasmanian Population Projections (TasPOPP) 2024

2.7 Break O'Day Movers and Leavers

Break O'Day is losing young people and the very elderly while attracting early retirees and some families, highlighting the need for flexible ECEC & OSHC services that support population retention, workforce participation, and long-term community sustainability

The Future Thinking: Demographic Change in Break O'Day report by Dr Lisa Denny highlights ongoing population churn, with young people and families leaving and early retirees moving in — a trend that directly impacts ECEC & OSHC demand, workforce supply, and regional service planning.



Leavers: Youth and Older Residents

- Many young people (15–34 years) leave due to limited education, training, and employment options.
- Families with school-aged children may relocate for better schooling access.
- Older residents (85+) are leaving due to aged care and mobility needs. This group is expected to nearly triple by 2038, placing pressure on aged care services.

Movers: Early Retirees and Lifestyle Seekers

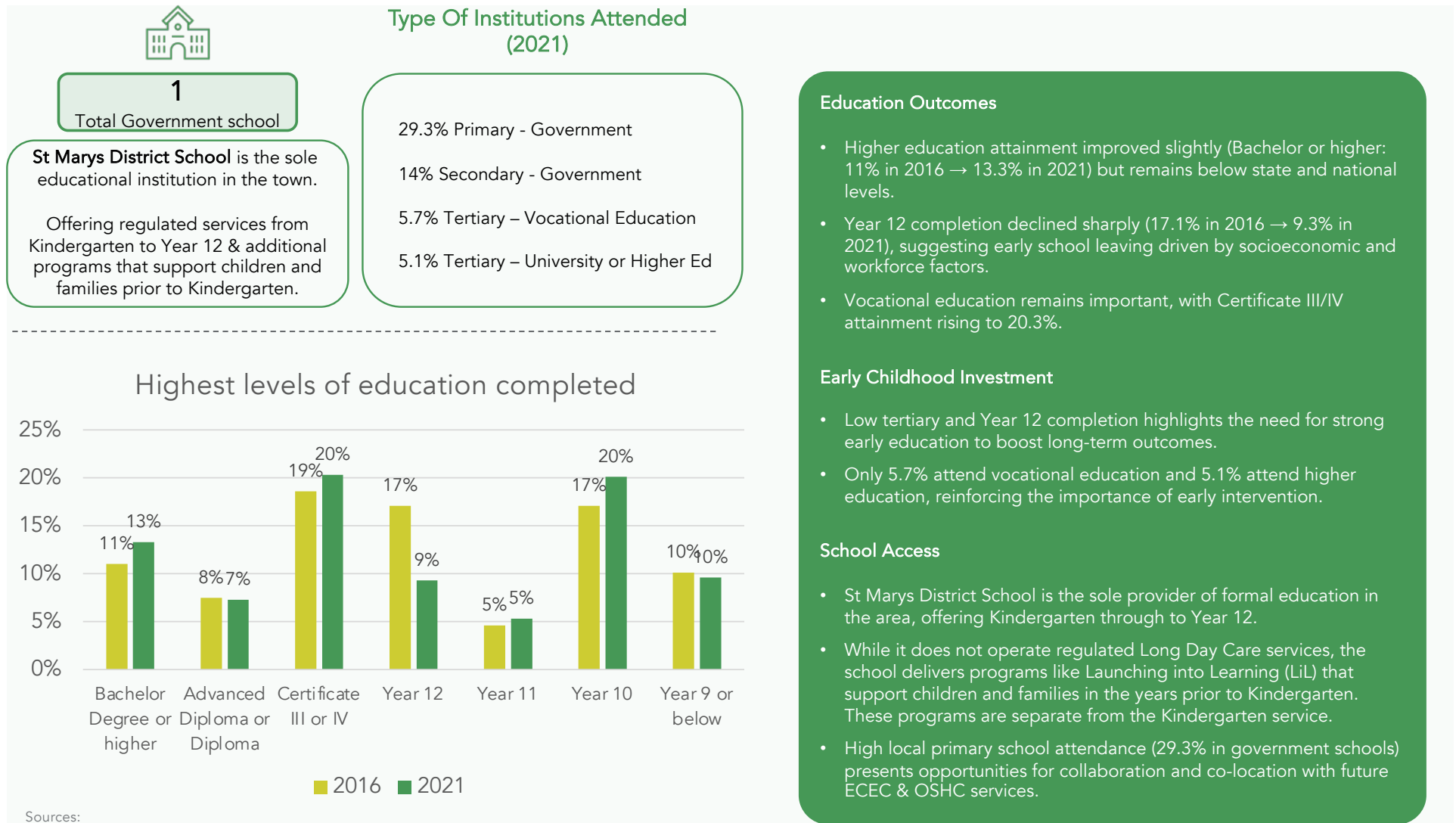
- Break O'Day attracts early retirees (50–64 years); 57% of new residents are aged 50+, many from other parts of Tasmania or interstate.
- Modest growth in families with children, particularly in the 5–14 and 30–49 age groups, sustaining some demand for ECEC & OSHC and schooling.

Implications for ECEC & OSHC and Service Planning

- Flexible ECEC & OSHC is essential to support families remaining or relocating.
- Workforce challenges highlight the need for strategies to attract essential workers.
- Long-term sustainability depends on reversing youth outmigration and balancing housing, care, and job opportunities for all age groups.

2.8 Education

St Marys faces low Year 12 and tertiary completion, modest vocational gains, and reliance on one school, highlighting the need for early education investment and targeted support



Sources:
 • Australian Bureau of Statistics

Education Outcomes

- Higher education attainment improved slightly (Bachelor or higher: 11% in 2016 → 13.3% in 2021) but remains below state and national levels.
- Year 12 completion declined sharply (17.1% in 2016 → 9.3% in 2021), suggesting early school leaving driven by socioeconomic and workforce factors.
- Vocational education remains important, with Certificate III/IV attainment rising to 20.3%.

Early Childhood Investment

- Low tertiary and Year 12 completion highlights the need for strong early education to boost long-term outcomes.
- Only 5.7% attend vocational education and 5.1% attend higher education, reinforcing the importance of early intervention.

School Access

- St Marys District School is the sole provider of formal education in the area, offering Kindergarten through to Year 12.
- While it does not operate regulated Long Day Care services, the school delivers programs like Launching into Learning (LiL) that support children and families in the years prior to Kindergarten. These programs are separate from the Kindergarten service.
- High local primary school attendance (29.3% in government schools) presents opportunities for collaboration and co-location with future ECEC & OSHC services.

2.9 St Marys vs Break O'Day Household Composition and Income

St Marys' small size, ageing population, lower incomes, and transport reliance highlight the need for accessible, affordable ECEC & OSHC tailored to a financially vulnerable and dispersed community

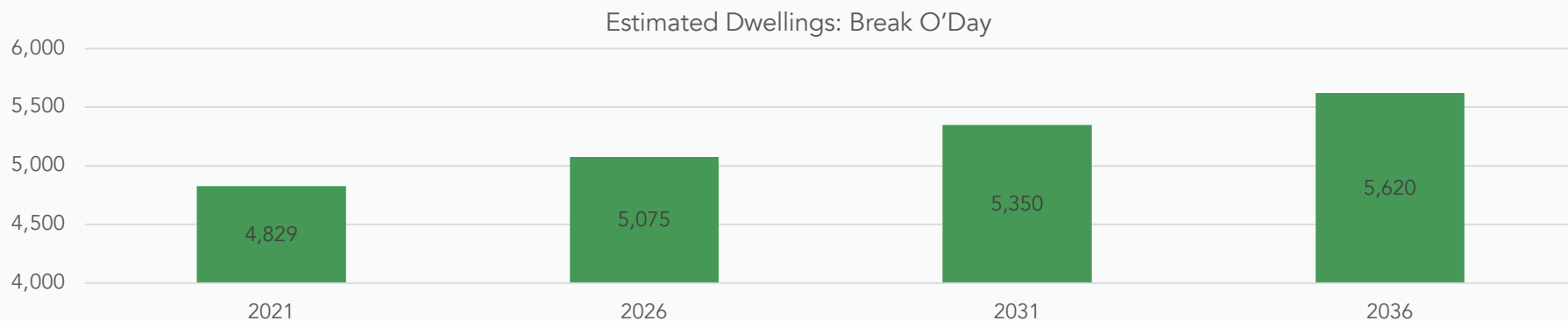


Household Composition and Income

St Marys vs Break O'Day (2021)		
	Break O'Day	St Marys
Total Private Dwellings	4,829	423
Average Household Size	2.0 people	2.0 people
Median Weekly Household Income	\$836	\$759
Median Monthly Mortgage Repayments	\$1,083	\$867
Median Weekly Rent	\$240	\$205
Average Motor Vehicles per Dwelling	1.9	2.1

Implication: St Marys has lower incomes and growing housing pressures, underscoring the need for affordable, flexible ECEC & OSHC options to support working families.

- **Low Share of Housing (423 Dwellings):** St Marys is small but significant; services like ECEC & OSHC must meet local needs without scale.
- **Small Household Size (2.0):** Ageing population and fewer children may reduce demand but increase isolation risks for families.
- **Lower Income Levels (\$759 vs \$836/Week):** Greater financial vulnerability; affordable ECEC & OSHC is critical to support employment.
- **Lower Housing Costs But Also Lower Income:** Families may still face housing stress, reducing ability to pay for private care options.
- **Higher Car Ownership (2.1 Vs 1.9):** Reliance on private transport; ECEC & OSHC must be easily accessible or co-located.



Sources:

- Australian Bureau of Statistics

2.10 St Marys Household Composition and Income

Slow population growth, stagnant family structure, and rising housing costs amid falling real incomes signal increasing financial pressure, reinforcing the need for affordable ECEC & OSHC to support family stability



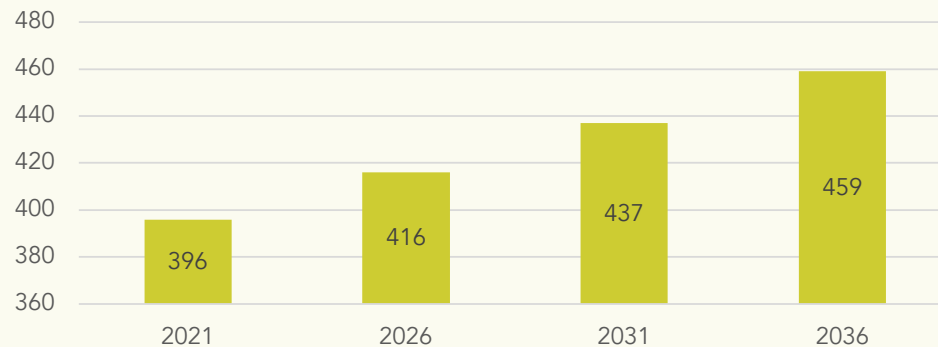
Household Composition and Income

St Marys 2016 vs 2021		
	2016	2021
Total Population	682	738
Total Private Dwellings	377	396
Average Household Size	2.0	2.0
Median Weekly Household Income	\$710	\$759
Median Monthly Mortgage Repayments	\$804	\$867
Median Weekly Rent	\$120	\$205

Implication: St Marys has lower incomes and growing housing pressures, underscoring the need for affordable, flexible ECEC & OSHC options to support working families.

- **Population growth (+8.2%):** Slow growth shows some attraction to the area; services must keep pace, even if modestly.
- **Stable household size (2.0):** Little change in family structure; no strong influx of young families to boost ECEC & OSHC demand.
- **Incomes up only 6.9% (below inflation):** Real incomes are falling; affordability of care will be a growing barrier.
- **Rent up 71%:** Rising housing costs are outpacing earnings, increasing cost-of-living pressure for families.

Estimated Dwellings: St Marys



Sources:

- Australian Bureau of Statistics, State Suburb Code (SSC) "St Marys".

St Marys & East Coast Tasmania ECEC & OSHC Needs Analysis



St Marys ELS Street View



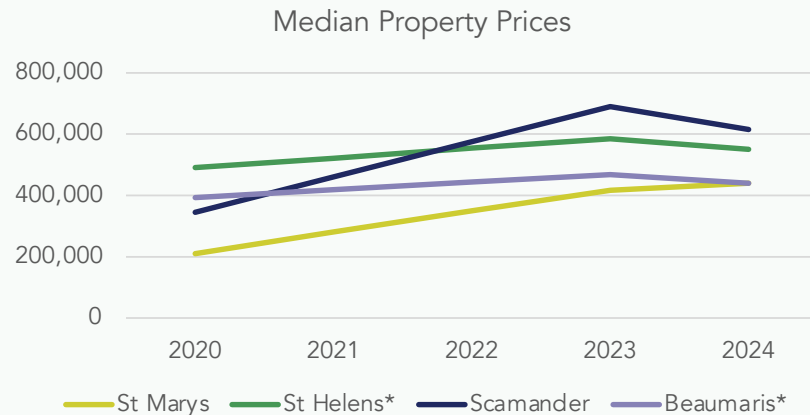
St Marys District School

2.11 Break O'Day Housing Pricing, Availability and Rentals

St Marys faces a tight housing market with rising property and rental costs, adding financial pressure on families and highlighting the need for affordable, flexible ECEC & OSHC options



House Price & Availability



Note: St Helens was estimated based on known 2018 and 2023 values while Beaumaris was estimated based on 80% of St Helens' median, reflecting typical local price differentials and confirmed by regional sales trends.*

	St Marys	St Helens	Scamander	Beaumaris
Number of available properties & estates for sale	149*	239*	252*	245*
Number of available properties & estates for rent	6*	16*	12*	15*

Sources:

- Realestate.com.au
- Domain
- Homes Australia
- REIT Quarterly Report (2023 – 2024)

Listings on realestate.com.au as of 28.5.25*



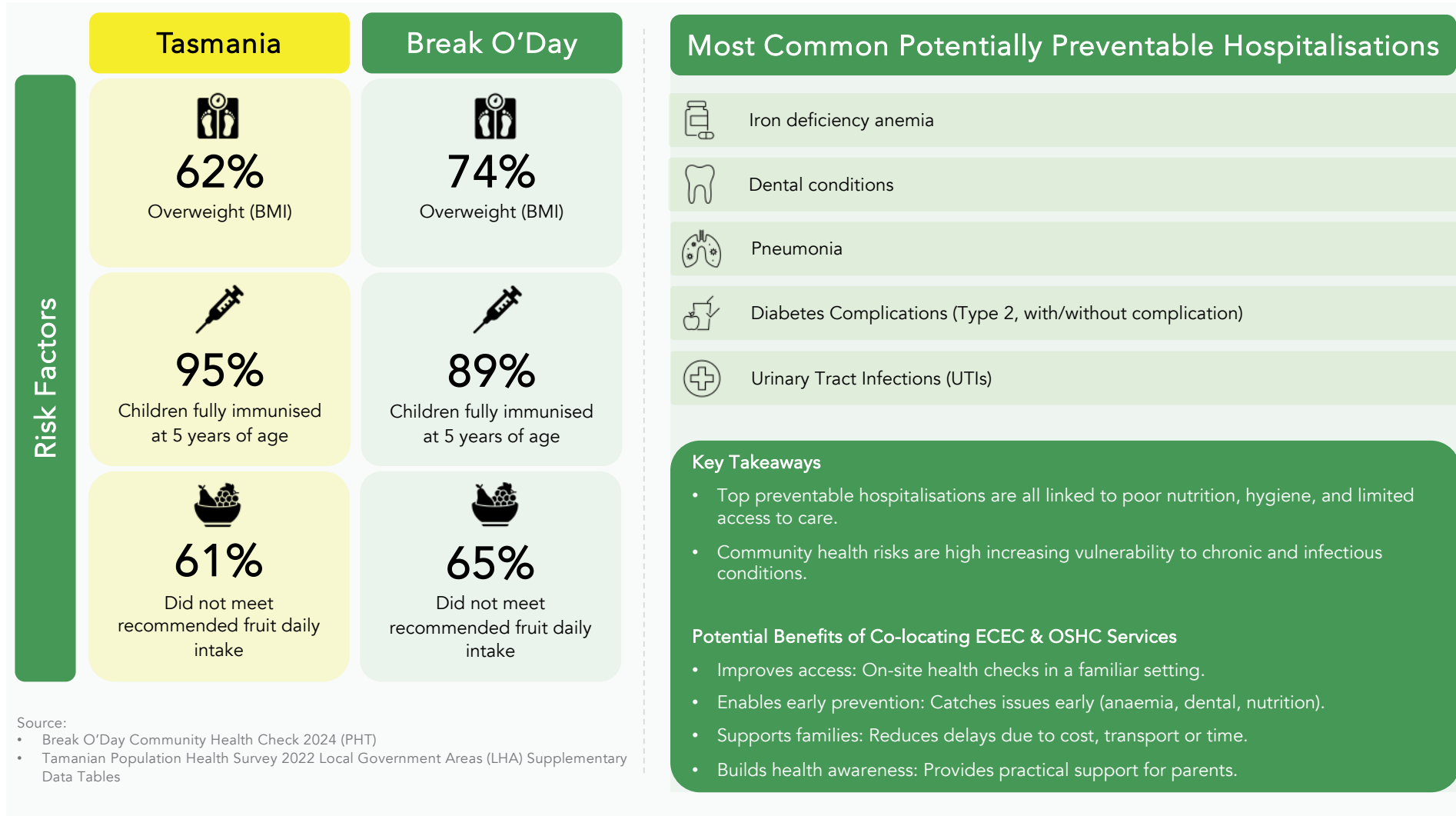
Break O'Day Rental Price

	2020	2021	2022	2023	2024	% Δ
St Marys	\$220	\$275	\$330	\$385	\$360	+64%
St Helens	\$450	\$450	\$450	\$450	\$410	-9%
Scamander	\$400	\$400	\$400	\$400	\$420	+5%
Beaumaris	\$240	\$300	\$360	\$390	\$390	+63%

- St Marys has the tightest housing and rental market in the region.
- Median house prices have doubled to ~\$440k, the fastest growth locally. While still the most affordable town in the region, rising costs may discourage young families and place pressure on existing residents.
- St Marys remains the most affordable purchase option despite price growth.
- Rental prices have increased by 64%, rising from \$220 to \$360 per week. This sharp growth contributes to rental stress, especially for families with young children who may rely on single or part-time incomes.
- Limited rental supply (only 6 properties available) adds further pressure.
- Expanded ECEC & OSHC services can support greater parental workforce participation and bolster the ability to deal with rental stress and affordability pressures.

2.12 Health and Wellbeing

Break O'Day has higher rates of preventable hospitalisations and lifestyle-related risks than Tasmania on average, with more overweight residents, poorer diets, and lower child immunisation



2.13 St Marys Language and Country of Birth

St Marys remains a predominantly English-speaking, Australian-born community with minimal cultural diversity, suggesting ECEC & OSHC services can focus on mainstream programs while preparing for gradual inclusion



Country of Birth

	Country of Birth	2016 Census	2021 Census
	Australia	79.6%	77.1%
	England	6.3%	6.2%
	New Zealand	1.6%	1.6%
	Chile	1.2%	–
	Scotland	1.0%	0.9%
	Wales	1.0%	1.1%
	China (excluding SARs and Taiwan)	–	0.8%

Sources:

- Australian Bureau of Statistics



Languages Used at Home

2016

96.4%
English

2021

95.5%
English

3.6%
Other

4.5%
Other

- St Marys remains predominantly Australian-born (77.1%) with small, stable migrant populations from England and New Zealand.
- English-only households (95.5%) dominate, though there's been a slight rise in other languages since 2016.
- ECEC & OSHC services should focus on English-based programs, while gradually embedding inclusive practices to support slow-growing cultural diversity.

PART A:
ST MARYS ECEC
& OSHC
SERVICES

3.1 St Marys ECEC Services

Long day care and kindergarten are offered in St Marys while outside school hours care and family day care services are not

Understanding the structure of ECEC (0-5y) & OSHC (5-12y) services is essential to assessing gaps in St Marys. The following outlines key service types, age groups, who provides them, and what government support is available.



Offered In St Marys

Long Day Care refers to centre-based education and care for children aged 0–5 years, typically operating full-day hours. In St Marys, this is delivered through a small, not-for-profit licensed service catering to mixed-age groups with capped daily places, regulated under the National Quality Framework (NQF).

Long Day Care: 0–5 years (with mixed-age grouping in small centres like St Marys).



Not offered In St Marys

Outside School Hours Care (OSHC) Out of school hours care (OSHC) is the name commonly given to services that provide education and care to school age children before/after school and during school holidays. St Marys previously offered OSHC, but it ceased in 2019 due to low demand and logistical barriers. Recent trends suggest a **renewed need** for OSHC to support working families, though space and staffing remain obstacles.

OSHC: 4–12 years (primary school-aged).



Not offered In St Marys

Family Day Care is flexible, home-based care for small groups of children (often across varied age ranges), delivered by registered educators. While available elsewhere in the region, it has proven **unsustainable in St Marys**, with services often short-lived due to limited local educator availability.

Family Day Care: 0–12 years (depending on educator capacity).



Offered In St Marys

Kindergarten in Tasmania is a part-time, play-based early learning program for children in the year before formal schooling (Prep). Kindertgartens are delivered through Tasmanian schools. Every government school offers at least 15 hours of kinder per week, over two to three days.

Kindergarten: 4–5 years (the year before Prep - age 4 by January 1)



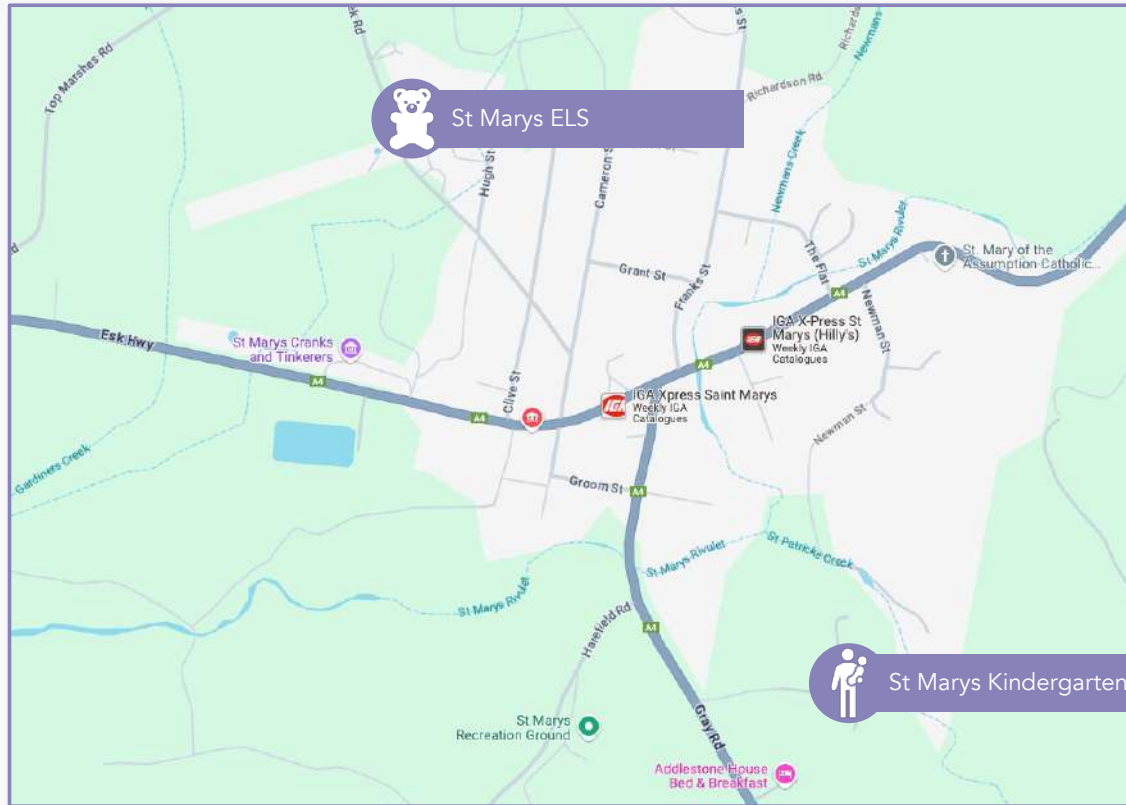
Early Learning for Three-Year-Olds (EL3 Initiative)

The Tasmanian Government wants all children in Tasmania to be able to access quality early learning in the year before kindergarten, to give them a great start in life and learning.

The Early Learning for Three Year Olds (EL3) initiative aims to support the capacity of Tasmania's Early Childhood Education and Care (ECEC) services to ensure that quality early learning is available where children and families need it.

3.2 St Marys ECEC & OSHC Locations

In St Marys, the school delivers the only Kindergarten service; St Marys ELS runs the only ECEC & OSHC program



Sources:

- Consultations

- Education and care in St Marys is delivered across two main locations, St Marys Early Learning Service co-located with the St Marys District Hospital, and St Marys District School providing kindergarten program for 4-year-olds.
- There are limited licensed places—due to staffing shortages and infrastructure constraints at the St Marys ELS—that is restricting access for local families. This has reportedly discouraged new families from settling in the area, impacting the growth of the St Marys township.
- St Marys District School offers a range of Birth–5 programs, including *Launching into Learning* (free play-based learning for ages 0–4), *Stepping Stones* (pre-kinder transition support), and formal *Kindergarten* for children who are 4 years old by 1 January.

St Marys ELS



- Licensed Places: 10
- Current Total Enrolment: 33
- Current Waitlist: 2 (Many families aren't interested in being waitlisted)
- Community-based
- Not-for-profit
- Programs:
 - Long Day Care (birth – 5Y)

St Marys District School Kindergarten



- Previous Total Enrolment (2024): 17
- Current Total Enrolment (2025): 9
- Future Total Enrolment (2026): 16
- Estimated Total Capacity: 25
- Programs:
 - Launching into Learning (birth – 4Y)
 - Stepping Stones (Pre-kinder)
 - Kindergarten (4Y)

3.3 St Marys Early Learning Service

The St Marys ELS urgently requires facility expansion, qualified staff, and support services to meet rising demand from high-needs families in a resource-limited rural setting



Targeted investment in infrastructure, staffing, and support services is essential to meet current demand and ensure long-term sustainability.

Sources:
• Consultations

About The Centre

- The St Mary's Early Learning Service is a regulated service under the National Quality Framework. The service is approved for 10 children per day yet supports up to 49 children across the week (2024) with a consistent waitlist. The mixed-age enrolments and strict educator-to-child ratios (e.g. 1:4 for infants) place daily pressure on the service.
- The current facility is small, inflexible, and unable to expand or support after-school care, which ceased in 2019 due to low demand and a low number of licensed places.
- The service, like all others along the East Coast, is a not-for-profit community-based service.

Workforce

- Workforce shortages significantly impact capacity. Most staff are part-time, leaving only two educators available most days—just enough to meet minimum ratios, with limited flexibility for breaks or planning. Maintaining the required 50% Diploma-qualified staffing ratio is a persistent challenge.

Families

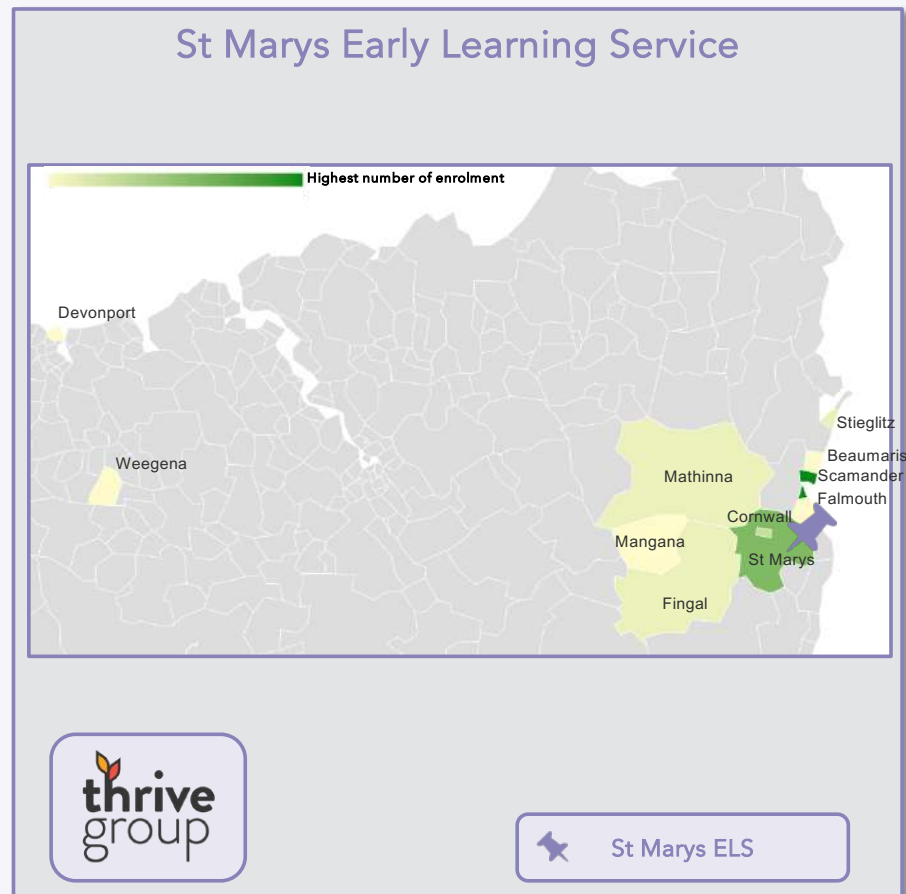
- The centre provides services for families in need of additional support, including foster carers and single-parent households. There is no local access to allied health services, and limited public transport restricts access. These factors constrain the centre's ability to meet current and future demand.

Key Needs

- Larger, purpose-built facility to increase licensed places and reinstate after-school care.
- Improved workforce capacity, including recruitment and retention of qualified educators.
- Access to allied health services to support children with developmental needs.
- Transport solutions to improve service access for isolated families.

3.4 Map of Enrolments

Children attend St Marys ELS from across several nearby towns—most notably Scamander, Mathinna and Fingal—highlighting regional reliance on a single central service and the need to expand access locally



Sources:

- ABS Census Data
- Thrive Group Data

Analysis:

- Data shows that children attending the St Marys Early Learning Service come from a broad catchment area, including townships such as St Marys, Scamander, Mathinna and several outlying rural communities. This geographic spread reflects both the limited availability of childcare across the region and the central role St Marys plays in local early years service delivery.
 - Scamander accounts for the most enrolment (13), even higher than the St Marys township itself (8). This could be most likely due to parents preferring ECEC & OSHC services where their work is located.
 - Families places of residence appear in distant towns like Devonport and Weeena—over two hours away. While some families may travel this far for services, consultations insights suggest they may have failed to update their current address or instead may be part of a transient population based in these towns but accessing services along the East Coast.
 - The diversity of home locations underscores the region's transport disadvantage, making localised or co-located services in St Marys even more essential.
 - The service draws enrolments from over 11 different localities, reinforcing the lack of alternative ECEC0 & OSHC options on the east coast.
- The St Marys service is a regional hub for early learning, serving families well beyond the town boundary.
 - Transport distance is a barrier—underscoring the importance of expanding local capacity and co-locating services.
 - Demand is not confined to St Marys—there is regional unmet need, especially in towns like Scamander, Mathinna, and beyond.

3.5 Tasmania ECEC Requirements and Pathways

Tasmania offers subsidised Certificate III to degree-level early childhood qualifications



The Early Years & School Age Care Workforce Strategy provides a state-wide framework to address the workforce shortages impacting early years services in St Marys, supporting local solutions through regional planning and staff development.

Sources:

- Early Years & School Age Care Workforce Strategy
- Consultations



ECEC & OSHC Qualifications

- **Certificate III in Early Childhood Education and Care** – required to work as an educator under the National Quality Framework (NQF).
- **Diploma of Early Childhood Education and Care** – enables roles with greater responsibility and can support centre compliance with staffing requirements.
- **Bachelor-level Qualification + Graduate Certificate** – allows recognition as an Early Childhood Teacher (ECT). Tasmania follows national staffing standards: services with 25–59 children require at least one ECT, and services under 25 must have access to an ECT, not necessarily on-site.



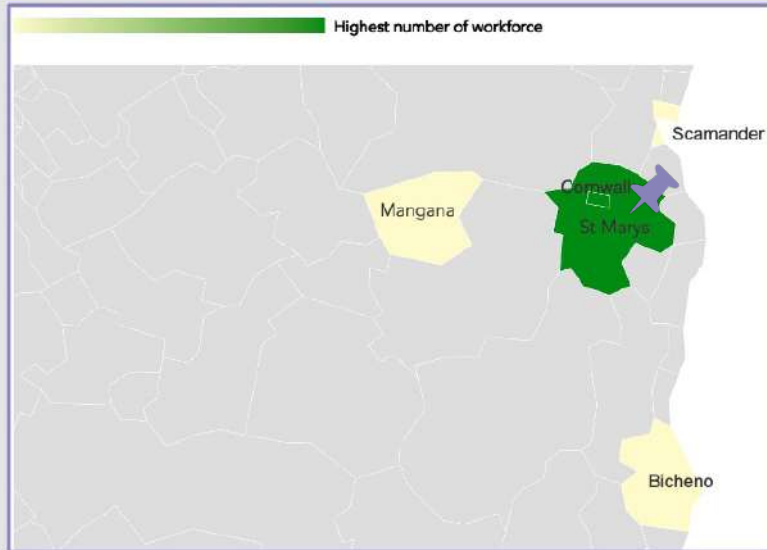
ECEC & OSHC Education Pathways

- **TasTAFE:** Offers Certificate III and Diploma with blended delivery, but entry is competitive due to state subsidies. Feedback suggests adult learners often struggle to re-engage with formal education.
- **Lady Gowrie Tasmania (RTO):** Operates its own accredited training, with 70–90 trainees and high completion rates. Their RTO provides online support, regular site visits, and subsidised training for staff across regional centres including Swansea.
- **University of Tasmania (UTAS):** Offers flexible online or blended Bachelor of Education (Primary) and Graduate Certificate in Early Childhood Education, taken separately or combined. The combined pathway qualifies graduates to teach birth to Grade 6, though most work in primary schools. Some in-person training occurs in Launceston or Cradle Coast; most study is online with local placements. Lady Gowrie subsidises rural travel and supports more online training to aid regional staff.
- **Online RTOs (mainland):** Popular among visa-holders and remote learners, though costs are higher due to lack of subsidies.

3.6 ECEC & OSHC Workforce Challenges and Recruitment

Staffing and workforce attraction limitations are severely impacting ECEC & OSHC on Tasmania's east coast

St Marys Early Learning Service



St Marys ELS

Very few students complete their ECE Certificate III or Diploma on the east coast, with the highest annual completion between 2019 and 2023 being just 15.

Sources:

- Consultations
- Tasmania Workforce Compass Vocational Education



Workforce Challenges

- **Staff Shortages:** Centres like Swansea operate at capacity with limited flexibility; Bicheno relies on staff commuting from St Helens.
- **Low Training Completions:** The South East Coast recorded zero Certificate III completions in 2023.

Consultation Findings:

- **Recruitment Gaps:** In-home care programs remain inactive due to an inability to attract educators.
- **Poor Career Progression:** Minimal pay difference between Cert III and Diploma roles discourages upskilling.
- **High Turnover:** Consultations anecdotally revealed that Diploma-qualified staff often leave for better-paid or more flexible jobs.
- **Service Mismatch:** ECEC & OSHC hours don't meet the needs of hospitality and tourism workers.
- **Workforce Instability:** Seasonal population shifts and housing shortages undermine staffing continuity.



Pipeline of New Educators

- **Training Completions Remain Low And Unstable:** In the Northeast, only 5 people completed a Certificate III in 2023—down from 10 per year between 2020–2022. The Southeast Coast recorded just one year of completions (5 in 2022) over a five-year period, with zero completions in 2019, 2020, 2021, and 2023.
- **Limited Age Diversity:** Most completions are by younger and mid-career adults; almost none from older workers.
- **Few Traineeships:** Limited centre capacity and transport barriers restrict local training.
- **Poor Retention:** Relocation incentives have low impact, with many leaving within 2–3 years.
- **Current Support:** EL3 funds a study mentor and resources for five Certificate III in ECEC students who meet weekly at the CFLC. Thrive has hired a Project and Training Advisor to support learners, coordinate local placements, and assist with employment.
- **Support Coming:** Skills Tasmania plans new incentives (bonuses, mentoring, relocation) by mid-2025.

3.7 ECEC & OSHC Workforce Recommendations

Recruitment, training, and service coordination are essential to expanding the St Marys ECEC Workforce



Workforce Strategies

Consultations with local stakeholders, including the current St Marys childcare service manager, and workforce data provided by Thrive highlight several targeted opportunities to strengthen and sustain the Early Childhood Education and Care (ECEC) and Out of School Hours Care (OSHC) workforce in St Marys.



Strategic recruitment

Work with Regional Jobs Hub, Break O'Day Employment Connect to recruit locals, return-to-work parents, migrants and school leavers as these are common profiles of the early years workforce.



Local placement pipeline

Leverage a future St Marys early years hub or school-based OSHC as student placement sites to build the workforce, while advocating for locally delivered Cert III training. Partner with the Regional University Study Hub, CUC Eastern Tasmania, and providers such as Lady Gowrie Tasmania to make training and upskilling more accessible and supportive.



Transport solutions

Advocate for road upgrades and increased frequency of transportation from nearby townships.



Investigate reinstating OSHC

Explore re-establishing OSHC by securing licensed space at the school; recent changes suggest demand may now be higher than in past surveys.



Further support & upskilling for educators

Expand workforce support by adapting models like Asuria's placement consultants and the mentoring systems used by Thrive and Lady Gowrie, giving educators a clear point of contact for guidance, while also providing targeted professional development to equip staff to better support the high proportion of children with additional needs at St Marys ELS.



Shared staff across centres to meet shortages

Coordinate across organisations to continue to share staff across services and improve attraction/retention strategies of diploma level educators for St Marys.



Local allied health expansion

Advocate for and partner with allied health providers to establish in-town or outreach services in St Marys, improving both child outcomes and the town's attractiveness as a place for staff to live and work.

3.8.1 Integrated Approaches: ECEC Programs

St Marys benefits from several early years programs that support child development and family engagement



ECEC Initiatives & Programs

Several key early years programs in St Marys support young children's development and family engagement, with a focus on access and inclusion.

Building Blocks – Play and Learn Together

A mobile early learning service operating since 2015, Building Blocks delivers early learning for three-year-olds across the Break O'Day region, including St Marys. The program offers play-based early learning experiences and parenting support. Sessions are held at various community venues, such as the Fingal Valley Neighbourhood House.

Working Together (WT)

Working Together is one of Tasmania's key initiatives to improve access to early learning for children and families who may face additional challenges.

- Working Together currently provides 220 fully funded placements annually across Tasmania in partnership with 43 ECEC services across the North-West, Northern, Midlands, East Coast and South of Tasmania.
- While specific enrolment numbers for St Marys are not detailed, the program is available in various locations, including St Marys, aiming to support children in accessing early learning opportunities.
- the Working Together - supporting early learning program (Working Together) supports children and families who may experience additional barriers to access and participate in early childhood education and care services.
- Working Together provides free access to two days per week (up to 20 hours) of early learning, delivered by ECEC services, for up to 50 weeks in the year before starting Kindergarten.
- Working Together also provides tailored, holistic support for children and their families to address barriers to access and participation. Supports may include referrals to other service supports, providing transport assistance or funding for additional educators to support the inclusion of children in early learning settings.
- Working Together also provides access to a range of professional learning and quality practice supports for ECEC service partners.



NMC with Tanya Greenwood of Building Blocks & Fingal Valley Neighbourhood House



3.8.1 Integrated Approaches: ECEC Programs (contd.)

St Marys benefits from several early years programs that support child development and family engagement



ECEC Initiatives & Programs

Launching into Learning (LiL)

Launching into Learning (LiL) in Tasmania is a free program for young children (birth-4 years) and their families, offered at all Tasmanian Government primary and district schools, as well as Child and Family Centres. It's a way for parents and children to get to know their local school and other families, with a focus on play-based learning. At St Marys District School, LiL sessions are run each Thursday by a qualified teacher.

Early Learning for Three Year Old's (EL3)

The Early Learning for Three Year Old's (EL3) initiative is one of several Tasmanian Government initiatives that aim to increase access to early learning for young children in Tasmania.

- EL3 is working in partnership with ECEC services and communities to co-design and implement trial sites across 5 Tasmanian Trial communities where there is little to no access to ECEC. Trial communities are: East Devonport, West Coast, Break O'Day, Bruny Island, Flinders Island and Cape Barren Island.
- In Break O'Day EL3 for Three Year olds trial commenced in February 2025 and is an expansion model offering an additional day of occasional care delivered by the Fingal Valley Neighbourhood house under the Tasmanian Child Care Act. The service has approval for 9 children per day.



Department for Education,
Children and Young People

Tasmania has several strong early years programs, and in St Marys these help support access to learning—but their limited scope highlights the need for more consistent, place-based services through a dedicated ECEC & OSHC and family hub.

Sources:

- Consultations
- Building Blocks TAS
- ABC
- DfE Children and Young People
- Lucy Fraser Working Together
- DECYP

3.8.2 Integrated Approaches: St Helens CFLC

The CFLC in St Helens shows how integrated ECEC and health services can improve outcomes



Co-Located Services: St Helens CFLC

The Child and Family Learning Centre (CFLC) in St Helens acts as a vital hub supporting families with children aged birth to five years, offering a comprehensive range of free, community-focused services that promote early childhood development, family wellbeing, and social inclusion. Services include access to social workers, child health nurses, allied health professionals, parenting support, playgroups, and practical assistance such as free food, coffee, and laundry facilities. This welcoming environment enables families to connect, access essential health and social services, and participate in early learning programs.

A core strength of the CFLC is building strong partnerships between families, educators, and health providers. It operates playgroups and school readiness programs while providing outreach support tailored to vulnerable families. Increasing demand for complex case support highlights the critical need for accessible, holistic services in communities facing health challenges linked to nutrition, hygiene, and limited care access—issues reflected in Break O'Day's high rates of preventable hospitalisations such as iron deficiency anaemia, dental conditions, and pneumonia.

The CFLC collaborates closely with local ECEC & OSHC centres; for instance, children attending St Helens ELS & OSHC are walked to the centre for additional services. This model demonstrates how ECEC settings can serve as an access points for integrated family supports.

St Marys currently lacks a dedicated CFLC-type facility despite facing similar health and social risks. Expanding or adapting ECEC services in St Marys to include outreach programs like those at the CFLC would improve access to health, education, and social support within a trusted, local setting. This approach would help address gaps in early intervention, reduce social isolation, and provide critical supports for vulnerable families, especially in a community where transport, cost, and workforce pressures limit care options.

Implementing a CFLC-style outreach within St Marys ECEC services could significantly strengthen the early years support network, improving health outcomes and family wellbeing by linking ECEC with comprehensive community services.

Family Services

Social Worker (Adults)

Abbie offers professional, confidential support on Wednesdays around mental health and wellbeing for any families accessing the CFLC. Please call or drop into the centre to make an appointment.

Physiotherapist

Neidra visits us on the first Friday of each month offering physiotherapy to parents/carers. Chat to us about her next visit if you would like an appointment.

Just Healthy Families Lawyer

Zoe Craven visit us here on the last Monday of each month. You can speak to us about booking an appointment or call 1800 874 986

Services Australia

Sonya Riley visits us every 4 weeks and can help families with Medicare, Centrelink and Child Care Subsidy supports.

Parent Pathways

Bianca visits the first month of the month and can help families who are looking at returning to the workforce or commence training.

Yemaya Counselling

Zoe and Rebecca? can offer domestic violence-based counselling



Toy Library

Borrow from our Toy Library. No fees, just ask one of our staff to borrow and become a member.



Playgroup

Birth to 5 years, community organised activities for families to connect and learn through hands on experiences and free play.

School Ready

A chance for children starting kinder in 2026 to meet new friends, have a play and practice some skills to help you to be school ready.

Baby Group

Meet other families with babies and enjoy a yummy lunch. Discover simple ways to support the development of your baby from birth until they are on the move.

Swimming

This program supports children to explore the water

The background image shows a two-story brick house with a blue corrugated metal roof. A window with a dark frame is visible on the right side. The house is surrounded by some landscaping, including bushes and a brick planter box. A large, semi-transparent blue overlay covers the left side of the image, and the title text is positioned within this area.

PART A: FUTURE SERVICE REQUIREMENTS

4.1 St Marys Early Learning Service Supply & Demand

St Marys ELS experiences reliance from surrounding towns highlighting the need for expansion

Demand

	2024	2025	2026	2027	2028	2029
St Marys & Scamander (0-4)*	56	55	55	56	56	57
LDC & OSHC Enrolments	49	33**	36	36	36	36
Capacity (Licensed Places)	10	10	10	10	10	10
Optimal Licensed Places	39	26	29	29	29	29
Licensed Places Gap	29	16	19	19	19	19

- *St Helens & Scamander as these towns have the highest enrolment numbers at this centre.
- **Data collection occurred in mid-2025, figures for that year may be partial or incomplete.
- The additional places and educators are based on projected enrolments, a minimum of four care days per child, and an assumed average 1:7 educator-to-child ratio (average of 1:4, 1:5, and 1:10 ratios), to estimate FTE educators needed for optimal licensed capacity.
- See Appendix C for detailed supply/demand model.

Supply

	Year	Number
Current Number of Educators	2025	7
Optimal Number of Educators	2029	10
Additional Educators to Meet Demand	2029	+3

To meet the projected growth in St Marys, where demand requires an additional **19 licensed places**, the workforce will need to expand by at **least 3 educators** to ensure safe ratios and service continuity.

Regional Reliance – The St Marys service supports families from more than 11 towns, with enrolments already well above its 10 licensed places.

Scamander Demand – Enrolments from Scamander are the highest in the region, surpassing even those from St Marys itself. Current regional development planning in Scamander-Beaumaris may proportionally increase enrolments at St Marys ELS over time.

Transport Barrier – With only 10 places available against around 36 enrolments by 2025, many families are forced to travel long distances to access care.

Broad Catchment – Families from rural towns such as Mathinna, Fingal and Cornwall rely on the service, adding pressure to already limited places.

Unmet Need – The service faces a sustained shortfall of 16–29 places through to 2029, highlighting significant regional shortages in ECEC and OSHC.

4.2 Infrastructure Requirements

Understanding the National Quality Framework and any Tasmanian specific to estimate the space and land size requirements to address the estimated unmet demand in St Marys

To address unmet demand in St Marys and accommodate projected enrolments, the planning for a new ECEC & OSHC centre must align with Tasmanian licensing requirements for both room capacity and indoor/outdoor space per child.

Room and Demand Assessment

- Based on current and projected data the **largest shortfall of optimal licensed places in St Marys in any one year is 29 (2024)**.
- While a gap of 19+ licensed places are projected by 2029, infrastructure planning should account for fluctuations and be to accommodate peak demand.
- In Tasmania, the average room accommodates approximately 12 children, though this varies depending on age group and room design. To meet demand:
 - $29 \div 12 = \sim 2.4$, indicating a need for at least 3 rooms.
 - Building 3 rooms would accommodate up to 36 children, addressing the current shortfall and providing capacity for future growth, enrolment fluctuations, and age-mix changes.

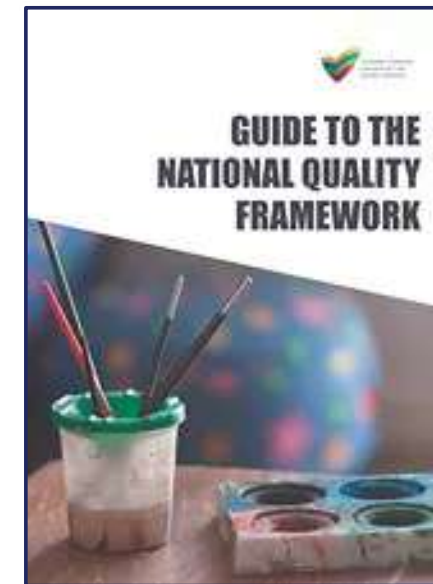
Age Group	Educator to Child Ratio
0-24 months (under 2)	1:4
24-36 months (2-3 years)	1:5
36 months+ (3+ years)	1:10 (TAS specific)

Space Requirements

- Tasmanian regulations require the following **minimum** space per child:
 - Indoor space:** $\sim 3.25 \text{ m}^2$
 - Outdoor space:** $\sim 7.0 \text{ m}^2$
- For a 3-room facility serving 36 children:
 - Indoor space needed:** $36 \times 3.25 \text{ m}^2 = 117 \text{ m}^2$
 - Outdoor space needed:** $36 \times 7.0 \text{ m}^2 = 252 \text{ m}^2$
 - Total required activity space:** 369 m^2
- This calculation does **not** include circulation space, staff amenities, storage, or parking.

Estimated Total Land Size Requirements

- Ideal floor space** $\sim 700 \text{ m}^2$ total floor area (500 m^2 enclosed + 200 m^2 unenclosed).
- Additional internal space** – staff rooms, amenities, storage, consulting rooms: $\sim 100 - 450 \text{ m}^2$.
- External site works** – parking, access roads, landscaping: $\sim 300 - 500 \text{ m}^2$.
- Total estimated land requirement:** $1,300+ \text{ m}^2$, depending on site layout and future expansion needs.



4.3 ECEC & OSHC Centre Option Considerations

Three possible sites for the new St Marys ECEC & OSHC service will be refined based on asset ownership, workforce access, co-location or outreach potential, family proximity, and site infrastructure

Three potential locations have been identified for the new service: the St Marys District School, the rear of the St Marys Community Health Centre, and 17 Main Street in the town centre.

These options will be further assessed and refined based on key considerations including asset ownership, workforce access, potential for co-location or outreach, proximity to families, and site infrastructure and access.

Key considerations

1

Land Availability & Ownership

- Understanding land ownership is essential. For instance, the rear of the St Marys Community Health Centre is a potential site; however, it's important to note that Homes Tasmania is considering housing developments at the northern end of this site, which may impact its availability for ECEC & OSHC purposes.

2

Workforce

- Evaluating where current and potential staff reside is crucial. A location that minimises commute times can aid in staff retention and recruitment, particularly in rural areas where workforce shortages are common.

3

Capacity for Services Co-Location or Outreach

- Sites that enable co-location with services like schools or health centres—or have space and flexibility to support outreach—can provide broader benefits. Outreach models can deliver early intervention and allied health services to children who might otherwise miss out, particularly in remote communities.

4

Proximity to Families

- Locating the centre close to where families live or travel frequently (e.g. near schools or in the town centre) increases accessibility and supports strong community uptake.

5

Infrastructure and Access

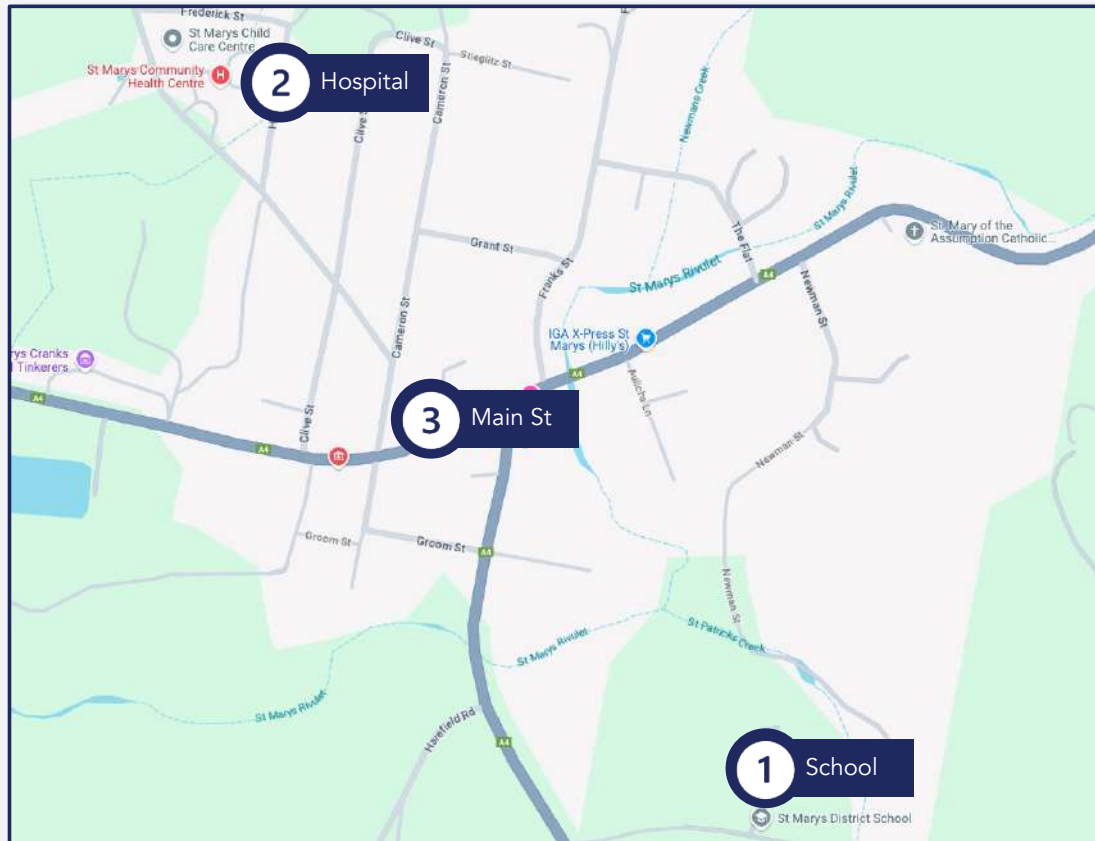
- Adequate utilities, road access, parking, and safe entry/exit points are essential. Sites with existing infrastructure can reduce setup costs and timeframes.



St Marys District School Land

4.4 Potential ECEC & OSHC Centre Locations

The three proposed sites for the St Marys ECEC & OSHC centre—at the school, health centre, and town centre—each offer unique advantages in education, health integration, and community access



Three potential locations have been identified for the new ECEC & OSHC facility in St Marys, each offering different benefits and challenges in terms of access, integration with existing services, and long-term suitability.

Option 1: St Marys District School 1

- Build a ECEC & OSHC facility co-located with the school to support smoother transitions, and collaboration between early learning and K–12.
- Address: 13 Gray Rd, St Marys

Option 2: Rear of St Marys Community Health Centre 2

- Build on the existing site to strengthen ties between ECEC & OSHC and health services, improving convenience for staff and access to support for families.
- Address: 13-17 Gardiners Creek Road, St Marys

Option 3: Main Street 3

- Build a standalone ECEC & OSHC centre in the heart of town for maximum visibility and walkability, though with limited space and no co-location opportunities.
- Address: 17 Main Street, St Marys

4.5 Option 1: St Marys District School

The first option for consideration of a new St Marys ECEC & OSHC service is to be co-located with St Marys District School

Solution Overview

- Option 1 proposes establishing a ECEC & OSHC facility at St Marys District School, located at 13 Gray Road. This site offers an immediate connection to the existing school environment, spanning early learning through to Year 12.
- The co-location with an established educational institution positions the site as a strong candidate for integrated early years education, with potential for smooth transitions into formal schooling.
- The site is owned by the Department for Education, Children and Young People (DECYP), and includes on-site parking, which is beneficial for both families and staff.

Drivers for this option

- Co-Location Potential:** The integration with the school supports collaborative learning models, shared resources, and a cohesive learning journey. There is also interest from stakeholder groups such as Thrive, St Marys District School staff, and local parents in co-locating ECEC & OSHC services with the school. This is largely due to the belief that such proximity can enhance collaboration and provide consistent developmental support for children across age groups.
- Proximity to Families:** Being centrally located within the township and on a known school route, the site is highly accessible for local families and could increase enrolments for the school.
- Workforce Considerations:** Locating the facility within the existing education precinct may help attract or retain staff, particularly if they are already working in or commuting to the school.
- Infrastructure Readiness:** The presence of car parking, road access, and utility connections means fewer barriers to development.

Detail	Option 1: St Marys District School
Location (Address)	13 Gray Rd, St Marys TAS 7215
Land Size	160,925 m ² (School ground total size)
Land Owner	DECYP
Co-Location	With school from kindergarten to year 12
Car Park	Yes



St Marys District School

4.5 Option 1: St Marys District School (contd.)

The first option for consideration of a new St Marys ECEC & OSHC service is to be co-located with St Marys District School

Advantages

- ✓ **Education Continuum:** The site supports continuity of learning from early childhood into school-age education, fostering familiarity and smoother transitions for children.
- ✓ **Service Integration:** Opportunities exist to collaborate with the school on shared health, wellbeing, and education programs.
- ✓ **Community Visibility:** The school is a known and trusted institution in the region, which may help build trust and uptake among families.
- ✓ **Reduced Setup Costs:** Existing infrastructure, such as parking and service connections, could reduce capital investment needs.

Disadvantages

- X **Space Constraints:** Depending on current land use, the school grounds may have limited space available for a new standalone ECEC & OSHC facility.
- X **Ownership and Governance:** As the asset is owned by DECYP, there may be additional governance and regulatory steps to secure approval for a new service.

Challenges

- **Stakeholder Coordination:** Establishing a new service within a school precinct requires close collaboration with DECYP, the school leadership team, and potentially unions or other workforce stakeholders.
- **Traffic and Safety Considerations:** While parking is available, an increase in daily drop-off and pick-up activity could impact existing traffic flows and safety unless managed with appropriate planning measures.



St Marys District School

4.6 Option 2: Rear of St Marys Community Health Centre

The second option for consideration of a new St Marys ECEC & OSHC service to be co-located with St Marys Community Health Centre

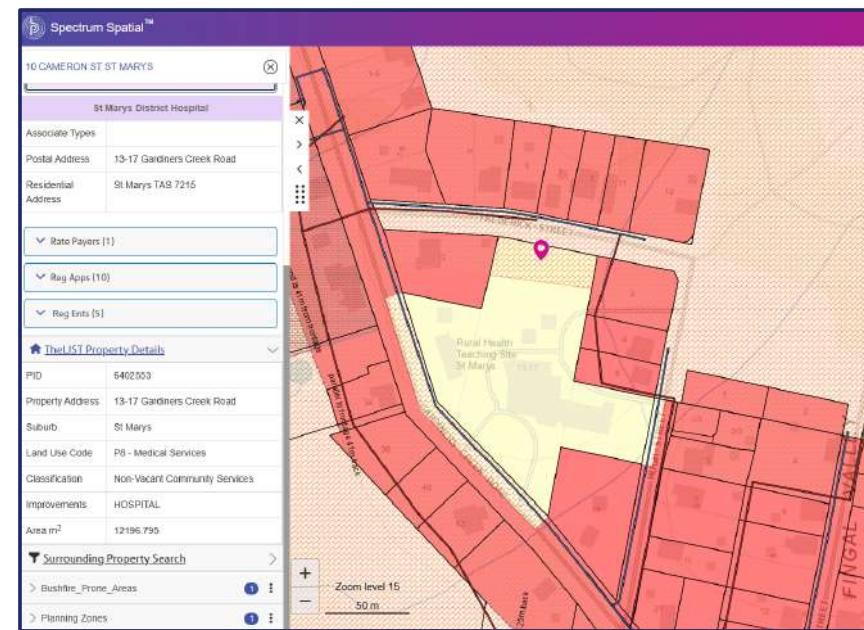
Solution Overview

- Option 2 proposes developing or expanding a ECEC & OSHC facility at 13–17 Gardiners Creek Road, co-located with the St Marys Community Health Centre.
- On-site parking is available, and the location offers potential for improved integration between early childhood education and allied health services, particularly for families needing more holistic, wraparound care in a rural context.

Drivers for this option

- Workforce Accessibility:** Health centre staff expressed a clear preference for ECEC & OSHC services near their workplace, particularly for those commuting from surrounding areas (e.g., St Helens, Bicheno, and Launceston). A local, co-located facility would increase workforce stability and allow nurses and allied health professionals to take on more hours.
- Child Health Integration Potential:** There is strong interest from the health service in exploring co-use of consulting rooms within the ECEC & OSHC facility, enabling visiting child health nurses or allied health professionals (e.g. occupational therapists) to work directly with young children on-site.
- Opportunity to Strengthen an Existing Location:** The existing co-location provides a foundation that could be further developed into a more collaborative, service-rich environment, reducing fragmentation of care and improving access for families who already visit the health centre for other reasons.
- Transport and Access:** Given transport limitations in the region, a centralised site that serves multiple purposes (health and education) reduces the travel burden on families.

Detail	Option 2: St Marys Community Health Centre
Location (Address)	13-17 Gardiners Creek Road
Land Size	12,196 m ²
Land Owner	Department of Health
Co-Location	No
Car Park	Yes



4.6 Option 2: Rear of St Marys Community Health Centre (contd.)

The second option for consideration of a new St Marys ECEC & OSHC service to be co-located with St Marys Community Health Centre

Advantages

- ✓ **Significant Land Size:** With over 12,000 m² of space, this site has strong potential for development or expansion, offering design flexibility to meet licensing requirements and accommodate growth.
- ✓ **Staff Convenience and Retention:** Locating ECEC & OSHC services next to the health centre supports working parents employed there, reducing time constraints and promoting workforce retention. Several staff have reduced hours due to ECEC & OSHC access issues—a co-located solution could address this.
- ✓ **Potential for Service Integration:** Stakeholders at the health centre expressed interest in closer collaboration, such as hosting child development consultations or allied health outreach at the ECEC & OSHC site. This could help address service gaps (e.g. speech therapy and occupational therapy) for children.
- ✓ **Existing Familiarity:** Families are already familiar with the location, which may support a smoother transition if the existing ECEC service is enhanced or reconfigured on-site.



Disadvantages

- X **Current Disconnect Between Services:** Although co-located, there is currently limited day-to-day interaction between the ECEC & OSHC service and the health centre. Realising the benefits of integration will require intentional planning, formal partnerships, and investment in shared objectives.
- X **Lack of Out of School Hours Care (OSHC):** While not specific to this site, several health staff mentioned the absence of OSHC options, limiting work flexibility—this is a service design consideration that may not be fully resolved by co-location alone.

Challenges

- **Collaboration Model Development:** Building a functional integration model between early years education and community health will require governance agreements, service design planning, and potentially capital investment in shared-use facilities (e.g., consulting rooms).
- **Recruitment of Allied Health Professionals:** Even if space is available, service gaps such as speech therapy are driven by workforce shortages across Tasmania. Co-location may help, but it is not a guaranteed solution without broader system change.
- **Operational Disruption:** Any redevelopment or expansion of the existing site will need to be carefully staged to avoid disrupting current ECEC services or health centre operations.



St Marys Community Health Centre

4.7 Option 3: Main Street

The third option for consideration of a new St Marys ECEC & OSHC service to be located in the centre of St Marys on Main Street

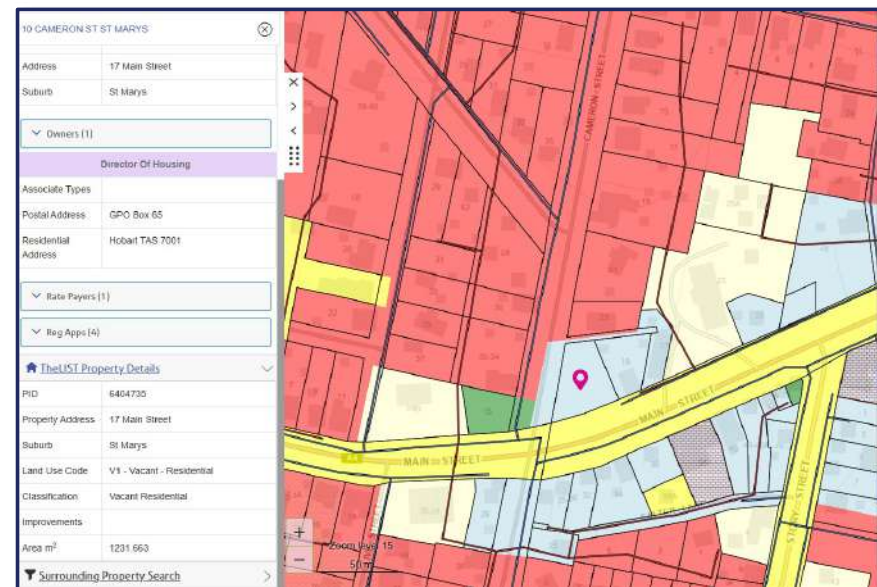
Solution Overview

- Option 3 involves the potential development of a ECEC & OSHC facility at 17 Main Street, St Marys, a centrally located land parcel within the town's main commercial and pedestrian zone.
- The site is owned by DECYP and spans approximately 1,231 m².
- Unlike the other options, this site does not offer immediate co-location with a school or health service, but its central position may offer accessibility and visibility advantages for families and the broader community. The site currently does not have an existing car park, which would need to be addressed through development planning.

Drivers for this option

- Proximity to Families:** Situated in the heart of town, the site aligns with patterns of foot and vehicle traffic, offering easy access for families dropping children off while running errands or commuting.
- Support for Local Business and Activity:** A centrally located ECEC & OSHC service could help stimulate the local economy, supporting parents who work or shop in town and possibly attracting new families to the area.
- Neutral, Community-Friendly Location:** Unlike school or health-based sites, this location may appeal to a broader cross-section of the community without the perception of exclusivity or institutional association.
- DECYP Ownership:** Public ownership simplifies the administrative and acquisition process, removing a significant barrier to development.

Detail	Option 3: Main Street
Location (Address)	17 Main Street
Land Size	1,231 m ²
Land Owner	Director of Housing
Co-Location	N/A
Car Park	No



4.7 Option 3: Main Street (contd.)

The third option for consideration of a new St Marys ECEC & OSHC service to be located in the centre of St Marys on Main Street

Advantages

- ✓ **High Accessibility:** Being on Main Street, the site is easily reachable by foot, bike, and vehicle, and is well placed for families who frequent town services or shops.
- ✓ **Community Presence:** A visible, central site promotes awareness of early childhood services, helping normalise and integrate ECEC & OSHC services into a main service hub.
- ✓ **Flexibility in Design and Operations:** Without the constraints of co-location, this site offers a blank canvas for designing a purpose-built facility that meets regulatory requirements and community needs.

Disadvantages

- X **Limited Land Size:** At just over 1,200 m², this site is significantly smaller than other options and may be constrained in terms of outdoor space, future expansion, or the ability to accommodate multiple programs (e.g. OSHC).
- X **Lack of Existing Infrastructure:** The site has no current car park, which would require development and may be challenging to achieve on a small footprint. Safe drop-off and pick-up zones would also need to be carefully planned given the Main Street location.
- X **Sloped Site:** The land has a noticeable slope, which may complicate design, accessibility, construction costs, and regulatory compliance (e.g. ramps, drainage, and retaining structures).
- X **No Built-In Service Integration:** Unlike the other options, there are no inherent opportunities for co-location or service collaboration with schools or health professionals unless formal partnerships are arranged off-site.

Challenges

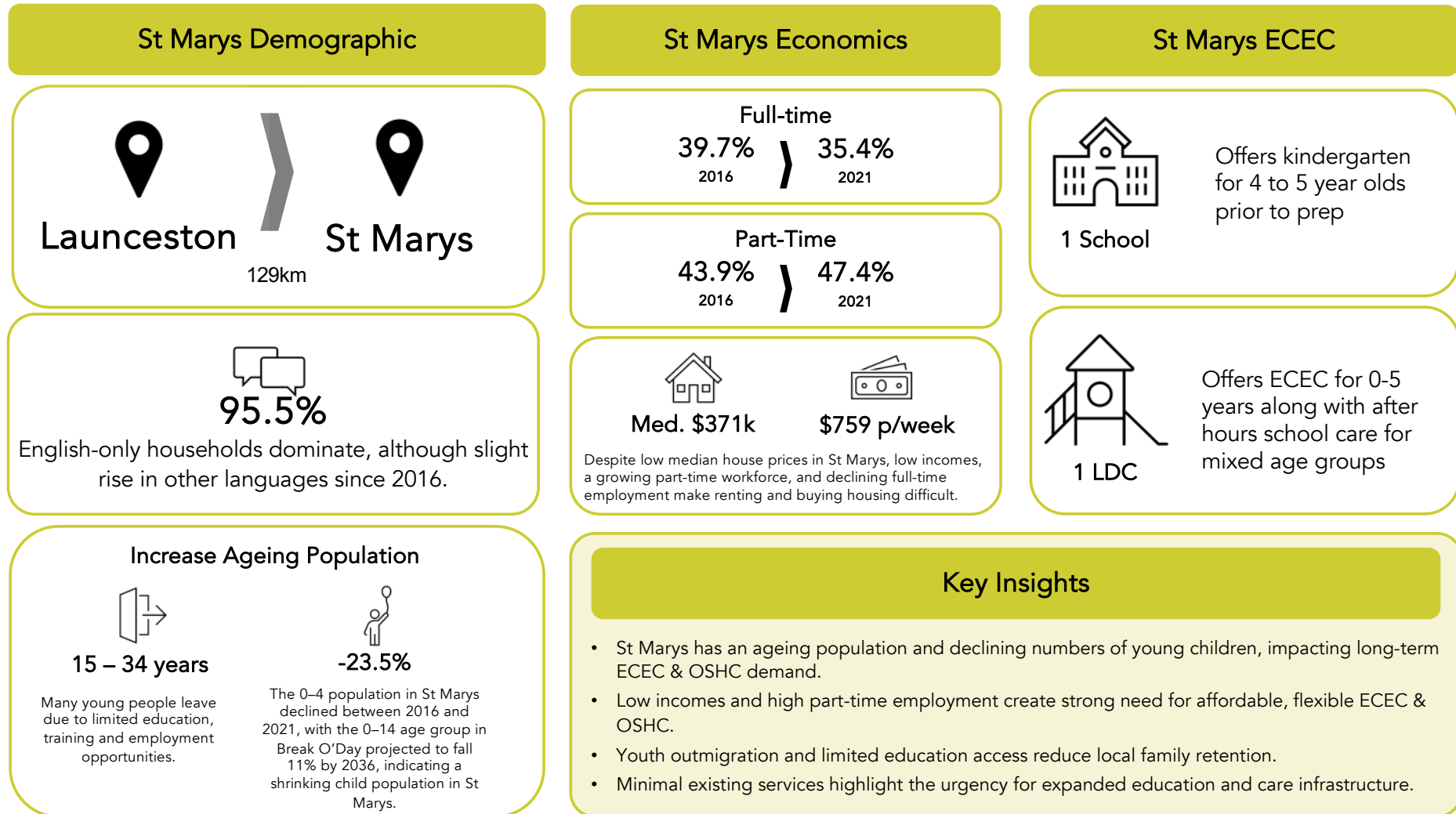
- **Infrastructure Requirements:** Developing this site would likely require investment in parking, access ways, fencing, and utilities—all from scratch. The small land size will make efficient planning critical.
- **Planning and Zoning:** As the site sits in a high-profile, central location, planning approvals may be more complex, particularly around traffic flow, noise, and compatibility with adjacent land uses.
- **Limited Co-location Benefits:** Without natural service partners on-site, delivering wraparound or allied health services would rely on external coordination and transportation, which is already a barrier for some families in the area.
- **Operational Constraints:** The central location may result in noise sensitivity or regulatory limitations related to proximity to businesses, residences, or public amenities.



Main Street

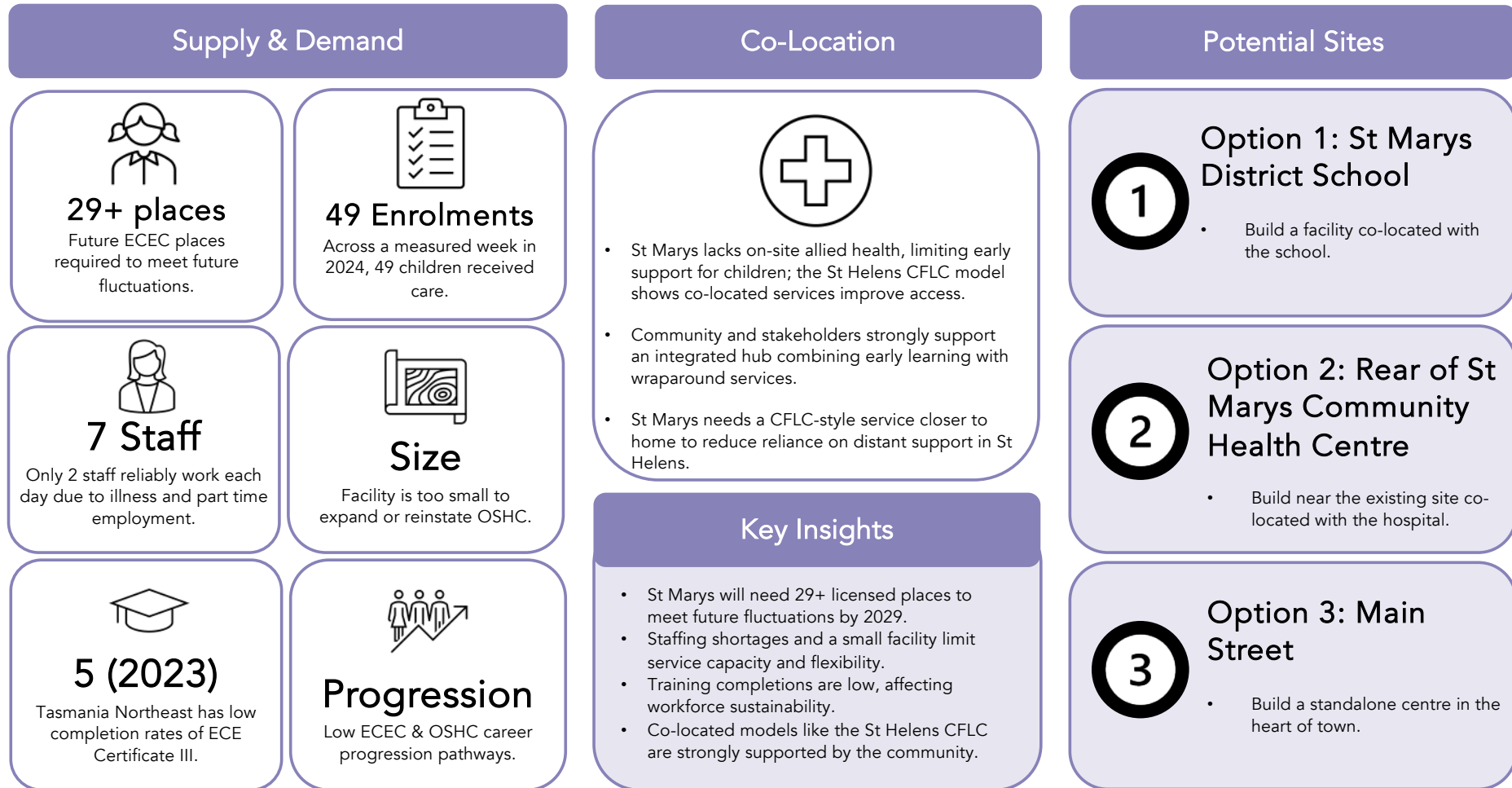
4.8 St Marys Needs Assessment Takeaways

St Marys' ageing population, youth outmigration, and limited services create urgent need for affordable, flexible ECEC & OSHC services to support local families and reverse long-term decline



4.9 St Marys Needs Assessment Takeaways (contd.)

St Marys needs 26 more enrolled places, but staffing, space, and training limitations require a co-located solution, with three potential sites identified



PART A: SITE ANALYSIS & EVALUATION



5.1 Evaluation Methodology

The feasibility of all options was comprehensively evaluated using quantitative and qualitative data, captured throughout the project

1.

Evaluation by Lenses

To evaluate the impact of implementing each option, the report uses **six evaluation lenses**.

Each lens combines qualitative and quantitative analysis.

The lenses are:

1. Demand
2. Location
3. Size
4. Workforce
5. Community & Families
6. Timeframe

2.

Evaluation by Risks

The implementation of each option presents several **risks** to the Council and community with **varying levels of likelihood and impact**.

The report identifies **six risk types** for the Council to prioritise, in order of potential impact to the key stakeholders.

The five risk types are:

1. Site Suitability & Land Use
2. Operational & Service Delivery
3. Regulatory Compliance
4. Family & Community
5. Financial & Economic

3.

Financial Evaluation

The implementation of each option carries financial implications that vary in scale, complexity, and long-term impact.

There are five key financial considerations for the Council to evaluate when assessing the viability of each option.

The five financial dimensions are:

1. Capital Cost (CapEx)
2. Operating Cost (OpEx)
3. Revenue & Funding Sources
4. Whole-of-Life Cost
5. Opportunity Cost/Value-for-Money

5.2 Evaluation by Lenses

NMC's evaluation lenses provide a comprehensive and mutually exhaustive assessment framework to identify the option/s that will best meet the children's needs of the St Marys and surrounding communities

EVALUATION LENSES

	LENS #1	DEMAND	Can the option meet or be scaled to meet current needs, and/or can the option be scaled further to meet future needs for LDC & OSHC services?
	LENS #2	LOCATION	Is the option in the best geographical location in St Marys to meet the needs of the St Marys and surrounding community?
	LENS #3	SIZE	Does the option allow for an appropriately sized facility that can meet current and projected demand?
	LENS #4	WORKFORCE	Can the option be successful with the current operating model, including workforce (educators) – what changes are required and are they achievable?
	LENS #5	COMMUNITY & FAMILIES	Will the option resonate with the community and meet family needs and perspectives on the availability and accessibility of services?
	LENS #6	TIMEFRAME	Can the option be delivered in a timeframe that meets immediate and medium-term needs?

5.3 Evaluation by Lenses – Criteria Matrix

To evaluate the impact of implementing each option, the report uses six evaluation lenses

EVALUATION CRITERIA FOR LENSES

		VERY LOW 	LOW 	MODERATE 	HIGH 	VERY HIGH 
	DEMAND	Cannot adequately support demand without major redesign.	Supports limited demand; major changes needed for future needs.	Meets current needs but future growth constrained.	Meets current and scalable with investment.	Fully meets current/future demand and scalable.
	LOCATION	Isolated from key services; difficult for families to access.	Limited access to schools or health services; some transport barriers.	Accessible but not integrated; some services nearby.	Near schools or health services; good transport links.	Co-located or directly adjacent to schools, health, and family services.
	SIZE	Too small; can't meet design or licensing standards.	Below ideal; compromises required.	Sufficient for now; limited room for expansion.	Adequate space with some flexibility.	Ample space for full design and future growth.
	WORKFORCE	Known workforce shortage; minimal recruitment support.	Limited local workforce; challenges expected.	Some local staff, but attraction/retention uncertain.	Near health/education services supporting staffing.	Close to workforce hubs; supports co-location.
	COMMUNITY & FAMILIES	Likely mistrust or lack of community support.	Limited familiarity or alignment with local needs.	Neutral perception; trust-building needed.	Good alignment with local values; likely support.	Strong alignment, inclusive, trusted by community.
	TIMEFRAME	Major delays likely due to unresolved issues.	Long timeframe due to zoning or infrastructure gaps.	Moderate delays from planning or design issues.	Minor works or approvals needed; short-term feasible.	Ready for immediate development; fast-track potential.

5.4 Evaluation by Lenses – Option 1: St Marys District School

Option evaluation by six lenses identified through qualitative and quantitative data



Option 1 Evaluation Lens Summary

The St Marys District School site is centrally located and well-regarded by the community, with strong existing demand, a purpose-built facility, workforce development opportunities, and prior planning that enables timely delivery of an integrated early learning service.

LENS	Option 1: St Marys District School	Rating
Demand	- Strong connection to early learning programs currently operating on site (e.g. Launching into Learning) - Families already engaged with the school community, supporting sustained enrolments - Co-location supports smooth transitions into primary education	
Location	- Central and well-used location for families with school-aged children - Accessible via local transport and established walking routes - Enables efficient drop-off and pick-up for families with multiple children	
Size	- Concept plans include a purpose-designed early learning wing - Site is sufficient for current needs, with some scope for future expansion - Opportunities for shared use of existing infrastructure, such as parking and access	
Workforce	- Potential for shared staffing models and local workforce development - May support education pathways for trainees and returning professionals - Attractive setting for educators due to its link with existing learning services	
Community & Families	- Strong community trust and familiarity with the school - Identified in stakeholder feedback as a preferred site for early learning - Supports continuity in children's education and care journey	
Timeframe	- Previous design work has already been completed - Existing site arrangements and stakeholder engagement support early progress - Strong foundation for collaborative project development	
Legend: Very Low Low Moderate High Very High		Overall Score

5.5 Evaluation by Lenses – Option 2: Rear of St Marys Community Health Centre

2

Option evaluation by six lenses identified through qualitative and quantitative data



Option 2 Evaluation Lens Summary

The rear of the St Marys Community Health Centre site offers ample space for a full-service early learning hub and future growth, with moderate demand, a practical but less education-connected location and some workforce potential.

LENS	Option 2: Rear of St Marys Community Health Centre	Rating
Demand	- Large site with capacity to meet both current needs and future growth - Suitable for additional services such as OSHC, EL3, and allied health - Potential to support families in surrounding rural communities	
Location	- Positioned near health services already accessed by families - Slightly further from the town centre, but still easily accessible - Less foot traffic and daily engagement than a school-based site	
Size	- Ample space for a full-service early learning and care hub - Supports future expansion, outdoor learning areas, and multipurpose rooms - No known development constraints	
Workforce	- Potential for use by nearby health sector staff with children	
Community & Families	- Known and trusted location for health and parenting services - Consultations reflected a more neutral perception for early learning purposes - Seen as practical, though less connected to education settings	
Timeframe	- Public site availability supports planning - Strong potential for inter-service coordination to support delivery	
Legend: Very Low Low Moderate High Very High		Overall Score

5.6 Evaluation by Lenses – Option 3: Main Street

Option evaluation by six lenses identified through qualitative and quantitative data



Option 3 Evaluation Lens Summary

The Main Street site, while centrally located and highly visible, is limited by its small size, lack of integration with education or health services, minimal stakeholder support, and workforce and design challenges, resulting in low demand alignment.

LENS	Option 3: Main Street	Rating
Demand	- Highly visible location could attract community interest - Site size limits capacity to meet projected enrolment demand - Was not prioritised in stakeholder or community feedback	
Location	- Located in the centre of town with nearby amenities - Not connected to school or health-based services - Less opportunity for integrated care and education delivery	
Size	- Smallest site, with known slope and design challenges - Limited ability to include outdoor space or additional services - Constrained for future expansion or flexible use	
Workforce	- No direct links to education or care services for workforce development - Recruitment and retention could be more difficult at a standalone site - Limited options for shared staffing or student placement	
Community & Families	- Neutral identity with no established role in early learning - May feel disconnected from children's education pathways - Less recognised by families as a trusted location for care	
Timeframe	- Owned land simplifies initial access - Full design and development needed - Sloping site conditions may impact design feasibility and timeframes	
Legend: Very Low Low Moderate High Very High		Overall Score

5.7 Evaluation by Risk

Option implementation risks are assessed through six key risk lenses to ensure all risk factors are well considered and evaluated

Understanding the risks involved with **three options** is **vital**.

A comprehensive understanding and evaluation of risks enables informed decision-making and aids selection of an option to pursue further.

To **assess risk levels** across each aspect of the identified options, the following risk lenses were identified:

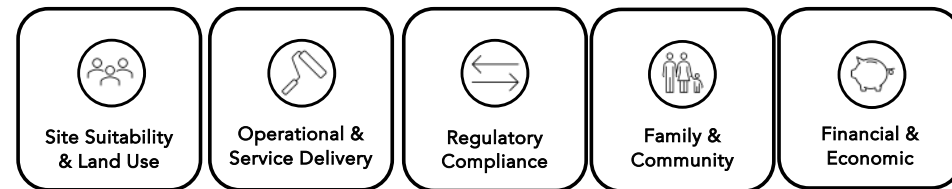
- Site Suitability & Land Use
- Operational & Service Delivery
- Regulatory Compliance
- Family & Community
- Financial & Economic

Based on the *ISO 31000 International Risk Management Framework*, a **thorough assessment** was **generated to summarise risks** and provide a response and rating, defined by the following:

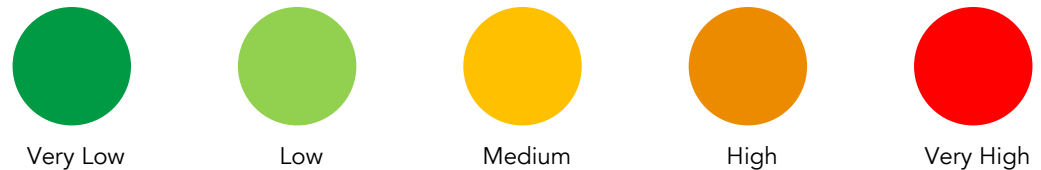
- **Accept:** Contingency plans for risk
- **Avoid:** Eliminate cause of risk
- **Transfer:** Have third party take on responsibility for risk
- **Mitigate:** Reduce probability or impact of risk

Risk Assessment Methodology

Risk Components



RISK ASSESSMENT



OVERALL OPTION RISK ASSESSMENT

5.8 Risk Evaluation Matrix

The risk evaluation matrix outlines and defines the key components

EVALUATION CRITERIA FOR RISK

Component	Description	Very Low	Low	Medium	High	Very High
Site Suitability & Land Use	Alignment of the site with zoning, planning, safety, and functional requirements	Site is fully compliant, flat, serviced, and appropriately zoned	Minor planning considerations; no major works required	Site needs moderate work to meet compliance or suitability	Significant constraints (e.g. zoning change, land prep)	Site is incompatible or not feasible without major intervention
Operational & Service Delivery	Ability to deliver high-quality and integrated education and care services from the site	Fully supports integrated, efficient service delivery	Minor layout or access limitations	Operational compromises required but manageable	Operational model significantly impacted	Site cannot support required services effectively
Regulatory Compliance	Capacity of the site and plan to meet legal, safety, and accreditation standards	Meets all current regulations with no changes required	Minor compliance adjustments needed	Moderate risk of non-compliance without proactive mitigation	High risk of breaching regulations without major redesign	Non-compliant or unlikely to be licensable without fundamental change
Family & Community	Accessibility, appeal, and perceived value of the site for families and the broader community	Centrally located, safe, accessible, and trusted by community	Slightly less accessible or lower perceived value	Some concerns about access, reputation or appeal	Location may deter some families or community engagement	Actively resisted or viewed as unsuitable by families/community
Financial & Economic	Affordability of site development and operations, and potential return on investment	Minimal cost; strong value for money; sustainable long-term	Manageable cost; no major financial risks	Moderate upfront or ongoing cost; may impact sustainability	High cost; limited long-term economic value	Cost-prohibitive or poses unacceptable financial risk

5.9 Evaluation by Risk – Option 1: St Marys District School

1

Option evaluation by five risk components identified through qualitative and quantitative data



Option 1 Risk Summary

A low-risk, well-supported site with existing infrastructure and strong community trust. Co-location with the school enables integrated service delivery and efficient use of space. Some design work is already complete, supporting a streamlined development process.

COMPONENT	Option 1: St Marys District School	Rating
Site Suitability & Land Use	- Site is already used for education and care programs - Proposed location is within existing school boundary - No rezoning required - Some site design work has been completed	●
Operational & Service Delivery	- Strong opportunity to integrate with school programs (e.g. Launch into Learning) - Shared infrastructure supports efficient delivery - Limited space may constrain some program flexibility	●
Regulatory Compliance	- Existing education site; known regulatory environment - Purpose-built extension is likely to meet standards with moderate adjustments - Close working relationships support compliance	●
Family & Community	- Highly trusted site; strong familiarity with families - Located in centre of town and used daily by families - Viewed positively during consultations	●
Financial & Economic	- Reuse of existing infrastructure reduces cost - Designs already developed - Co-location reduces long-term operational overheads	●
Legend: ● Very Low ● Low ● Medium ● High ● Very High		Overall Score ●

5.10 Evaluation by Risk – Option 2: Rear of St Marys Community Health Centre

2

Option evaluation by five risk components identified through qualitative and quantitative data



Option 2 Risk Summary

Spacious and accessible site with potential for integrated health and early years services. While development costs are higher, the site is practical and free of major constraints. Slightly lower visibility and school connection are the main limitations.

COMPONENT	Option 2: Rear of St Marys Community Health Centre	Rating
Site Suitability & Land Use	- Large, flat, publicly owned site - No known zoning or land use conflicts - Site is undeveloped and may require works to access rear area	●
Operational & Service Delivery	- Supports potential for integrated early years and allied health services - Separation from school may reduce educational alignment - Site is large enough to accommodate flexible layouts	●
Regulatory Compliance	- New build required; compliance depends on design execution - No known barriers to meeting regulations - Greater control over new construction may reduce compliance risks	●
Family & Community	- Trusted health centre location - Not as visible or familiar as the school site - Seen as a practical, but less educationally aligned choice	●
Financial & Economic	- More costly than school expansion due to full new build - Department of Health owns the site - Long-term value if co-location model is implemented well	●
Legend: ● Very Low ● Low ● Medium ● High ● Very High		Overall Score ●

5.11 Evaluation by Risk – Option 3: Main Street

Option evaluation by five risk components identified through qualitative and quantitative data



Option 3 Risk Summary

A high-risk option due to slope, limited size, and lack of integration with other services. Development would be costly and complex, with fewer operational and community benefits compared to other sites.

COMPONENT	Option 3: Main Street	Rating
Site Suitability & Land Use	- Site is sloped, small, and undeveloped - May require significant earthworks or design adjustments - Constraints likely to limit usable space	●
Operational & Service Delivery	- Site is disconnected from school and health services - Standalone nature limits service integration - Scale may restrict delivery of full program range	●
Regulatory Compliance	- Sloped terrain may pose building compliance challenges - No prior planning or design completed - Risk of design not meeting licensing requirements	●
Family & Community	- Neutral location with no strong identity or use history - Not referenced in consultations as a preferred site - May feel disconnected from learning or care journey	●
Financial & Economic	- Full build required on a constrained site - Higher design costs likely due to gradient and limited footprint - Standalone nature limits operational economies	●
Legend: ● Very Low ● Low ● Medium ● High ● Very High		●

5.12 Evaluation by Finance – Methodology

In-depth financial modelling provides a view of the potential future financial viability and opportunities provided by each identified option

Understanding the financial implications of each option is essential to making an informed decision. A detailed evaluation helps clarify the costs, benefits, and long-term value associated with each pathway.

This financial analysis supports the selection of the most cost-effective and sustainable option, ensuring that resources are allocated wisely and aligned with strategic goals.

Financial modelling outputs across the following categories were assessed for each option.

1. Capital Cost (CapEx)
2. Operating Cost (OpEx)
3. Revenue & Funding Sources
4. Whole-of-Life Cost
5. Opportunity Cost/Value-for-Money

A rating for each category is used to determine if the financial model is:

- Very Low
- Low
- Medium
- High
- Very High

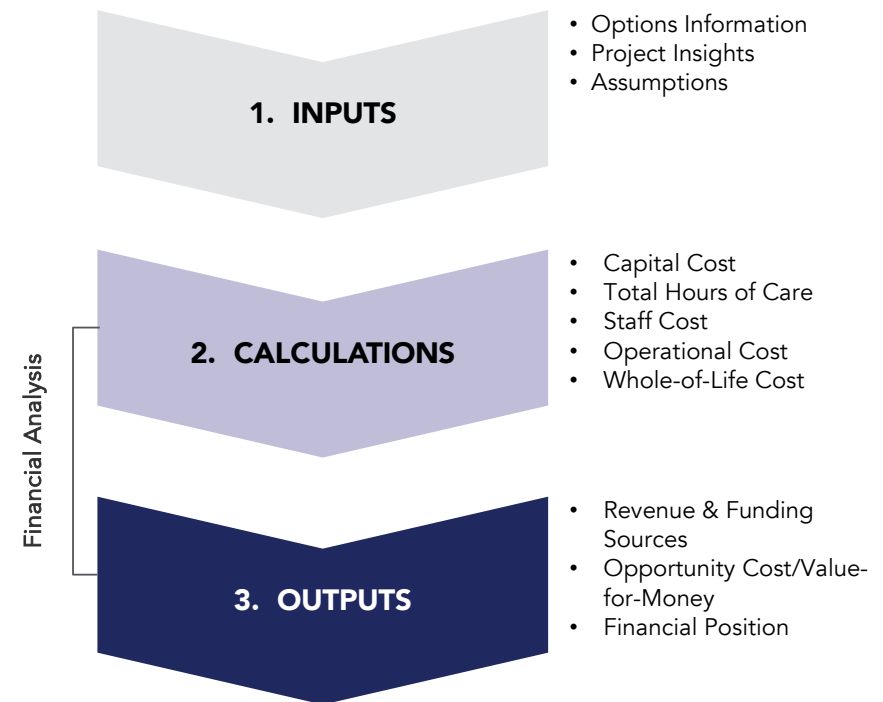
The financial model was built using inputs based on the design of each option. Key assumptions were utilised to shape the model where required.

Each financial model and the associated calculations provide a financial snapshot of each option and forecast. The output is a summary of the key financial metrics assessed and a forecasted view of the option.

Please refer to Appendix A for the full financial evaluation matrix

Legend: ● Very Low ● Low ● Medium ● High ● Very High

NMC's Options Analysis Financial Modelling Framework



5.13 Evaluation by Finance – Option 1: St Marys District School

Option evaluation by five risk components identified through qualitative and quantitative data



Option 1 Financial Summary

Option 1 involves a total project cost of \$3.49 million (ex. GST) to deliver a co-located ECEC & OSHC facility at St Marys District School. The 700 sqm facility would support integrated service delivery with minimal site duplication and aligns with DECYP's priorities for school-based early learning. The model leverages existing infrastructure, enables joint use of public assets, and provides the community with a sustainable, future-focused solution to meet longstanding demand.

Community & Strategic Alignment:

Co-locating with the school lets the community expand early-learning access where families already gather, strengthening educational continuity from birth through Year 12.

Aligns with DECYP's state program to embed early learning services on school grounds reducing duplication and streamlining licence approvals.

Supports Break O'Day Council's Liveability and Youth goals by placing an early learning service next to other youth-focused services, while Council remains an advocate and connector—not a builder or operator.

The shared campus model opens joint grants and shared-use spaces, giving the community the opportunity to maximise existing public assets with minimal additional footprint.

Inclusions

- Fit-out costs for kitchens, bathrooms, reception, lockers
- Project management
- Engineering and design
- Architect site supervision
- Basic Landscaping and fencing

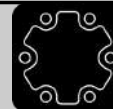
Exclusions

- FFE
- Taswater
- Tasnetworks
- Council fees and charges
- Land purchase
- Gst
- Finance, holding charges and costs
- Removal and disposal of asbestos
- Excavation in rock

Option 1		Value (\$) EXC GST
Building Size		1300sqm
CONSTRUCTION COST	RATE	COST
Fully enclosed covered area: 500 sqm	\$3600/sqm	\$1,800,000
Unenclosed covered area: 200 sqm	\$3600/sqm	\$720,000
Total Floor area: 700sqm	\$3600/sqm	\$2,520,000
Site Works & services: 600sqm	\$650/sqm	\$390,000
SUBTOTAL	Subtotal	\$2,910,000
CONTINGENCY & PROFESSIONAL FEES		
Design Contingency - Allowance 10%	\$291,000	
Construction Contingency - Allowance 5%	\$145,500	
Local condition allowance	\$145,500	
Market Conditions Loading		excl.
Design & Professional Fees 12%	\$349,200	
Statutory Authority Fees & Other Project Cost		excl.
Headworks Charges Allowance		excl.
	Subtotal	\$582,000
TOTAL PROJECT COST (Excluding GST):		
Overall sqm rate \$4,988.57		\$3,492,000

Please note the above figures do not constitute a budget or quote. It is a high-level cost opinion generated July 2025 utilising recent market data + information supplied by Ninety Mile Consulting

Estimates provided by Cykel
Architecture



5.13 Evaluation by Finance – Option 1: St Marys District School (contd.)

Option evaluation by five risk components identified through qualitative and quantitative data



Option 1 Financial Summary

Option 1 involves a total project cost of \$3.49 million (ex. GST) to deliver a co-located ECEC & OSHC facility at St Marys District School. The 700 sqm facility would support integrated service delivery with minimal site duplication and aligns with DECYP's priorities for school-based early learning. The model leverages existing infrastructure, enables joint use of public assets, and provides the community with a sustainable, future-focused solution to meet longstanding demand.

Component	Information	Evaluation	Score
Capital Cost (CapEx)	\$3.49 million total: \$2.52m (building) \$390k (site works) \$291k design contingency \$145.5k construction contingency \$145.5k locality loading \$349.2k professional fees	Low – appropriate for purpose-built centre; cost-effective compared to new greenfield site	●
Operating Cost (OpEx)	~\$600,000/year: \$500,000 staffing (6–8 FTE) \$100–150k operations (utilities, materials, admin)	Medium – Reflects rural staffing costs and service scale	●
Revenue & Funding Sources	- CCS (Child Care Subsidy) - Parent fees (partial cost recovery) - Future CCCF or Building Blocks grant rounds - Admin levy (if implemented)	Medium – Viability improves with subsidy access and stable enrolment	●
Whole-of-Life Cost	~\$1.04 million: - Estimated maintenance \$34,800/year (1.5% of total project cost) 30-year facility life	Medium – Co-location improves asset utilisation and efficiency	●
Opportunity Cost / Value-for-Money	- Directly addresses unmet demand - Reduces family travel burden - Supports youth outcomes, workforce, and liveability goals - Aligns with DECYP and Council priorities	Low – Strong strategic alignment and long-term value for the community	●
			Score ●

Legend: ● Very Low ● Low ● Medium ● High ● Very High

5.14 Evaluation by Finance – Option 2: Rear of St Marys Community Health Centre

Option evaluation by five risk components identified through qualitative and quantitative data



Option 2 Financial Summary

Option 2 involves a total capital cost of \$3.49 million and estimated annual operating costs of ~\$550,000 to deliver a 36-place ECEC & OSHC service co-located with the St Marys Community Health Centre. The model enables integrated early years and health supports, offering strong alignment with community priorities and regional service needs. Financial viability would rely on a combination of CCS subsidies, parent fees, and grant funding, with co-location presenting opportunities to streamline delivery for high-needs families and improve long-term value.

Community & Strategic Alignment:

Co-locating with the health precinct enables integrated early learning and allied health services—supporting wraparound care for families and aligning with regional priorities for rural wellbeing.

Strengthens connections to services like speech, mental health, and family support, while Council remains an advocate and connector, not a provider.

Aligns with Break O'Day Council's focus on community wellbeing and liveability, and opens access to co-location grants and joint-use planning with the Tasmanian Government. The shared campus model opens joint

Inclusions

- Fit-out costs for kitchens, bathrooms, reception, lockers
- Project management
- Engineering and design
- Architect site supervision
- Basic Landscaping and fencing

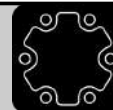
Exclusions

- FFE
- Taswater
- Tasnetworks
- Council fees and charges
- Land purchase
- Gst
- Finance, holding charges and costs
- Removal and disposal of asbestos
- Excavation in rock

Option 2		Value (\$) EXC GST
Building Size		1300sqm
CONSTRUCTION COST	RATE	COST
Fully enclosed covered area: 500 sqm	\$3600/sqm	\$1,800,000
Unenclosed covered area: 200 sqm	\$3600/sqm	\$720,000
Total Floor area: 700sqm	\$3600/sqm	\$2,520,000
Site Works & services: 600sqm	\$650/sqm	\$390,000
SUBTOTAL	Subtotal	\$2,910,000
CONTINGENCY & PROFESSIONAL FEES		
Design Contingency - Allowance 10%	\$291,000	
Construction Contingency - Allowance 5%	\$145,500	
Local condition allowance	\$145,500	
Market Conditions Loading		excl.
Design & Professional Fees 12%	\$349,200	
Statutory Authority Fees & Other Project Cost		excl.
Headworks Charges Allowance		excl.
	Subtotal	\$582,000
TOTAL PROJECT COST (Excluding GST):		
Overall sqm rate \$4,988.57		\$3,492,000

Please note the above figures do not constitute a budget or quote. It is a high-level cost opinion generated July 2025 utilising recent market data + information supplied by Ninety Mile Consulting

Estimates provided by Cykel Architecture



5.14 Evaluation by Finance – Option 2: Rear of St Marys Community Health Centre (contd.)

Option evaluation by five risk components identified through qualitative and quantitative data



Option 2 Financial Summary

Option 2 involves a total capital cost of \$3.49 million and estimated annual operating costs of ~\$550,000 to deliver a 36-place ECEC & OSHC service co-located with the St Marys Community Health Centre. The model enables integrated early years and health supports, offering strong alignment with community priorities and regional service needs. Financial viability would rely on a combination of CCS subsidies, parent fees, and grant funding, with co-location presenting opportunities to streamline delivery for high-needs families and improve long-term value.

Component	Information	Evaluation	Score
Capital Cost (CapEx)	\$3.49 million total: \$2.52m (building) \$390k (site works) \$291k design contingency \$145.5k construction contingency \$145.5k locality loading \$349.2k professional fees	Low – appropriate for purpose-built centre; cost-effective compared to new greenfield site	●
Operating Cost (OpEx)	~\$600,000/year: \$500,000 staffing (6–8 FTE) \$100–150k operations (utilities, materials, admin)	Medium – Reflects rural staffing costs and service scale	●
Revenue & Funding Sources	- CCS (Child Care Subsidy) - Parent fees (partial cost recovery) - Future CCCF or Building Blocks grant rounds - Admin levy (if implemented)	Medium – Viability improves with subsidy access and stable enrolment	●
Whole-of-Life Cost	~\$1.04 million: - Estimated maintenance \$34,800/year (1.5% of total project cost) 30-year facility life	Medium – Co-location improves asset utilisation and efficiency	●
Opportunity Cost / Value-for-Money	- Directly addresses unmet demand - Reduces family travel burden - Supports youth outcomes, workforce, and liveability goals - Aligns with DECYP and Council priorities	Low – Strong strategic alignment and long-term value for the community	●

Legend: ● Very Low ● Low ● Medium ● High ● Very High

Score

●

5.15 Evaluation by Finance – Option 3: Main Street

Option evaluation by five risk components identified through qualitative and quantitative data



Option 3 Financial Summary

Option 3 involves a total project cost of \$4.50 million (ex. GST) to deliver a standalone ECEC & OSHC facility at 17 Main Street, St Marys. The 700 sqm facility would operate independently from other community or school infrastructure, requiring higher upfront costs due to site slope, utilities, and absence of shared assets. While offering strong civic visibility and walkable access for families, the model does not provide co-location or integration benefits and carries a significantly higher capital outlay compared to other options.

Community & Strategic Alignment:

Co-locating with the school lets the community expand early-learning access where families already gather, strengthening educational continuity from birth through Year 12.

Aligns with DECYP's state program to embed early learning services on school grounds reducing duplication and streamlining licence approvals.

Supports Break O'Day Council's Liveability and Youth goals by placing an early learning service next to other youth-focused services, while Council remains an advocate and connector—not a builder or operator.

The shared campus model opens joint grants and shared-use spaces, giving the community the opportunity to maximise existing public assets with minimal additional footprint.

Inclusions

- Fit-out costs for kitchens, bathrooms, reception, lockers
- Project management
- Engineering and design
- Architect site supervision
- Basic Landscaping and fencing

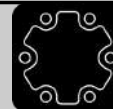
Exclusions

- FFE
- Taswater
- Tasnetworks
- Council fees and charges
- Land purchase
- Gst
- Finance, holding charges and costs
- Removal and disposal of asbestos
- Excavation in rock

Option 3		Value (\$) EXC GST
Building Size		1300sqm
CONSTRUCTION COST	RATE	COST
Fully enclosed covered area: 500 sqm	\$4,000/sqm	\$2,000,000
Unenclosed covered area: 200 sqm	\$4,000/sqm	\$720,000
Total Floor area: 700sqm	\$4,000/sqm	\$2,800,000
Site Works & services: 600sqm	\$1,000/sqm	\$600,000
SUBTOTAL	Subtotal	\$3,400,000
CONTINGENCY & PROFESSIONAL FEES		
Design Contingency - Allowance 10%	\$340,000	
Construction Contingency - Allowance 5%	\$170,000	
Local condition allowance	\$180,000	
Market Conditions Loading		excl.
Design & Professional Fees 12%	\$408,000	
Statutory Authority Fees & Other Project Cost		excl.
Headworks Charges Allowance		excl.
	Subtotal	\$1,098,000
TOTAL PROJECT COST (Excluding GST):		
Overall sqm rate \$6,426		\$4,498,000

Please note the above figures do not constitute a budget or quote. It is a high-level cost opinion generated July 2025 utilising recent market data + information supplied by Ninety Mile Consulting

Estimates provided by Cykel
Architecture



5.15 Evaluation by Finance – Option 3: Main Street (contd.)

Option evaluation by five risk components identified through qualitative and quantitative data



Option 3 Financial Summary

Option 3 involves a total project cost of \$4.50 million (ex. GST) to deliver a standalone ECEC & OSHC facility at 17 Main Street, St Marys. The 700 sqm facility would operate independently from other community or school infrastructure, requiring higher upfront costs due to site slope, utilities, and absence of shared assets. While offering strong civic visibility and walkable access for families, the model does not provide co-location or integration benefits and carries a significantly higher capital outlay compared to other options.

Component	Information	Evaluation	Score
Capital Cost (CapEx)	\$4.5 million total: \$2.8m (building) \$600k (site works, slope adjustment) \$170k contingency \$180k locality loading \$408k design & professional fees	Medium – Higher than Options 1 and 2 due to slope, premium build rate, and full standalone construction	●
Operating Cost (OpEx)	~\$620,000/year: \$500,000 staffing (6–8 FTE) \$120–150k operations (utilities, materials, admin)	Medium – Standard operating costs; standalone nature may limit flexibility	●
Revenue & Funding Sources	- CCS (Child Care Subsidy) - Parent fees (partial cost recovery) - Potential future CCCF or Building Blocks grant rounds	Medium – Viability depends on high occupancy; lacks integration efficiency	●
Whole-of-Life Cost	~\$1.35 million: - Estimated maintenance \$45,000/year (1.5% of total project cost) 30-year facility life	High – Long-term cost is elevated due to limited shared infrastructure	●
Opportunity Cost / Value-for-Money	- Improves access and civic visibility - Reduces access barriers for families without transport - Lacks co-location benefits for integration or workforce	Medium – Provides equity benefit but lower systemic value than other models	●
Score			●

Legend: ● Very Low ● Low ● Medium ● High ● Very High

5.16 Evaluation Summary

Evaluation summary of three options across three criteria

		OPTION 1 St Marys District School	OPTION 2 Rear of St Marys Community Health Centre	OPTION 3 Main Street
Evaluation by Lenses	DEMAND			
	LOCATION			
	SIZE			
	WORKFORCE			
	COMMUNITY & FAMILIES			
	TIMEFRAME			
	SCORE			
Evaluation by Risk	SITE SUITABILITY & LAND USE			
	OPERATIONAL & SERVICE DELIVERY			
	REGULATORY COMPLIANCE			
	FAMILY & COMMUNITY			
	FINANCIAL & ECONOMIC			
	SCORE			
Evaluation by Finance	CAPITAL COST (CAPEX)			
	OPERATION COST (OPEX)			
	REVENUE & FUNDING SOURCES			
	WHOLE-OF-LIFE COST			
	OPPORTUNITY COST/VALUE-FOR-MONEY			
	SCORE			
Total Score		71/80	67/80	42/80

Legend: Very Low Low Moderate High Very High Very Low Low Medium High Very High

PART A: FUTURE SERVICE MODEL & FUNDING



6.1 Service Models & Recommendation

NMC recommends co-locating the new ECEC & OSHC facility with St Marys District School to maximise access, address infrastructure constraints, and support integrated service delivery

NMC Recommends Option 1: St Marys District School

1

- Based on analysis of site suitability, community feedback, service gaps, and infrastructure limitations, **NMC recommends co-locating the new ECEC & OSHC facility with St Marys District School.**
- This model delivers the strongest outcomes across access, flexibility, and long-term sustainability. It also enables potential integration of OSHC, supports workforce development, and maximises existing educational infrastructure to meet local demand.

Current St Marys Service Models

- Long Day Care (0–5 years)**
 - Delivered by St Marys Early Learning Service.
 - Operating at full capacity (licensed for 10 places).
 - No enrolment for children under 9 months.
- No OSHC (3–12 years)**
 - Ceased in 2019 due to very low enrolments.
 - A later attempt to reintroduce OSHC faced licensing, space, and supervision challenges.
 - Demand is uncertain; previous surveys received minimal parent response.

Planning Considerations

- Opportunity to align with Tasmanian early years initiatives (e.g. EL3, 15 hours for 3-year-olds).
- Space, workforce, and transport remain key enablers.
- Community-led co-design will be essential to test and grow service models that reflect local needs.

Future Service Model Opportunities

Model	Description	Strategic Value
Integrated School Partnership	Co-locate long day care and outside school hours care within St Marys District School	Creates continuity across early years and school; overcomes site and licensing constraints.
Mini Child and Family Learning Centre (CFLC)	Combine long day care, allied health, family support and outreach	Builds on successful St Helens model; supports holistic child development and inclusion.
Flexible OSHC Reinstatement	Trial school-based after-school care model, with built-in demand review	Addresses historic low demand while responding to renewed community need; co-location avoids transport issues.

6.2 Funding Streams

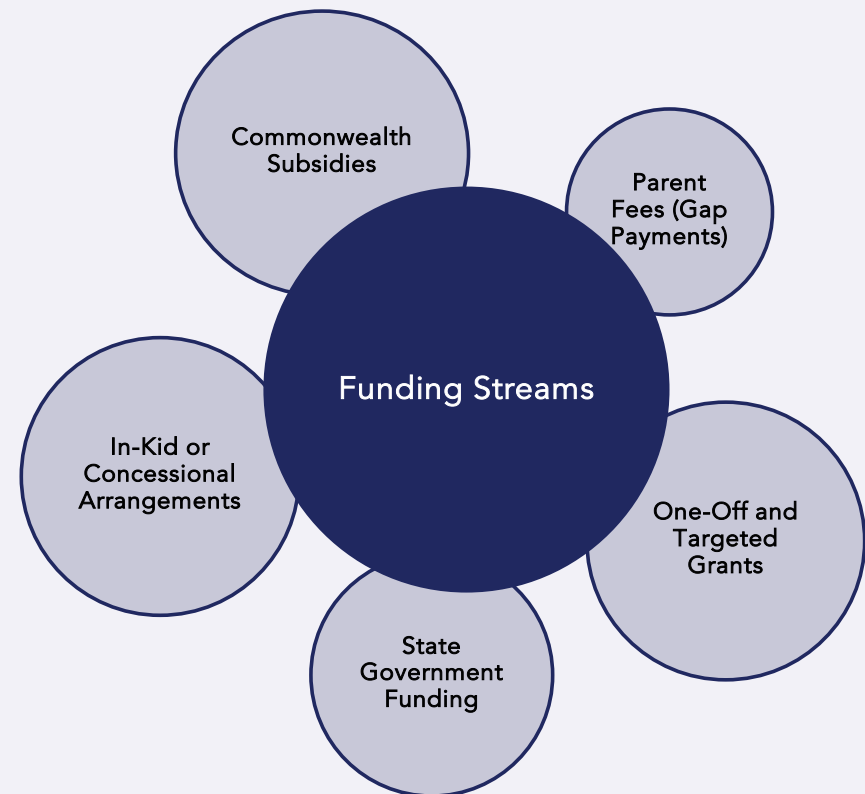
Tasmanian ECEC & OSHC services are funded through subsidies, fees, grants, and in-kind support, with low-population areas reliant on both ongoing and one-off funding

ECEC & OSHC Funding Model In Tasmania

ECEC & OSHC services in Tasmania operate under a mixed-funding model combining government subsidies, grants, and private contributions.

- **Commonwealth subsidies** – The Child Care Subsidy (CCS) covers a percentage of childcare fees based on family income, activity level, and the hourly rate cap. Most families in the East Coast region are CCS-eligible, but low enrolment numbers can still limit service revenue. The Additional Child Care Subsidy (ACCS) provides higher support for vulnerable or disadvantaged families, covering up to 100% of fees.
- **Parent fees (gap payments)** – Families pay the difference between the CCS/ACCS amount and the total service fee. In low-income or thin markets like St Marys, this “gap” can be a barrier to access if services set fees at sustainable levels.
- **State government funding** – Programs like Early Learning for Three-Year-Olds (EL3) provide additional hours for eligible children, while capital and operational grants may support new facilities or expansions.
- **One-off and targeted grants** – Competitive programs such as the Community Child Care Fund (CCCCF) provide capital works, business support, or service expansion funding, particularly in remote or disadvantaged areas.
- **In-kind or concessional arrangements** – Access to low-cost premises (e.g., school land) or shared facilities can reduce operating costs, improving viability.

This funding mix means sustainability often relies on securing both ongoing subsidies and periodic grants, especially where low population density limits fee revenue.



6.3 Funding Opportunities

Funding and support programs to grow and strengthen early childhood services in low-supply areas like St Marys

Program/Initiative	Administrator	Purpose & Relevance	Status (as of July 2025)	Notes
CCCF: Disadvantaged & Vulnerable Communities	Australian Government, Dept of Education	Provides capital or operating support in areas of entrenched socio-economic disadvantage — directly targets places like St Marys.	Closed (Round 4 closed Mar 2024) – Next round expected late 2025.	Priority will be given to remote, high-disadvantage LGAs.
CCCF: Limited Supply		One-off grants to expand or create new licensed places where local supply is very limited or non-existent.		St Marys's 10-place service qualifies as a "thin market"; can apply in Round 5 for up to 20 new places.
CCCF: Restricted Expansion		Funding to increase an existing small service's licensed places by up to 10 without full competitive process.		Enables incremental growth at minimal lead time; ideal for adding 5–10 places at the new school-co-located facility.
CCCF: Business Support		Provides consultancy, project management, or capacity-building to help services develop sustainable business models.		Can fund early-stage planning, governance frameworks, and community engagement work needed for the co-located service's launch and operation.
Inclusion Support Program (ISP)		Extra staffing & resources to include children with additional needs in mainstream ECEC services.	Ongoing	Apply any time via approved Inclusion Development Fund Managers.
Building Early Education Fund	Tasmanian Government, DECYP	Capital grants to construct and expand ECEC centres in regions and suburbs where access is limited	Commencing as of July 2025	Support for co-location of ECEC centres with schools and Not for Profit providers
Early Learning for Three-Year-Olds (EL3)		Under the EL3 initiative, Trial Sites are being established in communities across Tasmania (including in Break O'Day) to test different models of early learning service delivery to meet local community needs.	Ongoing , currently in Phase 4 – Test, evaluate, refine and review (2025/26)	DECYP has partnered with the ECEC sector; providing operational funding for the duration of the trial for up to 15 hours per week for eligible children.
Access to Government Land EOI		Six-week EOI for new ECEC sites on school-owned land; free or concessional lease arrangements.	Closed (EOI closed 20 Jun 2025)	Tasmanian Government to determine the interest of ECEC providers and services in utilising land on government school sites to develop new ECEC facilities.

- 4 CCCF streams suit St Marys; next round expected late 2025.
- Inclusion Support is open year-round.
- Government Land EOI closed (June 2025); future rounds possible.
 - Potential opportunity to engage with the Tasmanian Government/DECYP directly, outside of the current government land EOI process, as St Marys was not included among the 10 identified school sites.



Department for Education,
Children and Young People



Australian Government
Department of Education



6.4 Future Service Model & Funding Summary

A co-located model at St Marys District School is the most viable option, but long-term success relies on sustainable funding, flexible service models, and low-cost premises to ensure resilience

Section Summary



The analysis confirms that a **co-located model at St Marys District School is the most viable pathway** to meet local demand while addressing space and workforce challenges.

However, long-term success will depend on securing sustainable funding through a combination of subsidies, targeted grants, and concessional land use, alongside exploring flexible service models to ensure resilience in a low-population market.

Co-location offers the strongest model

Positioning the new ECEC & OSHC facility at **St Marys District School** maximises access, overcomes site constraints, and enables integrated service delivery.

Alternative models remain valuable

Mini Child and Family Learning Centre and flexible OSHC reinstatement options were noted as complementary approaches to broaden access and meet community needs.

Funding sustainability is mixed

Services rely on a **blend of subsidies, parent fees, and one-off grants**, with thin markets like St Marys particularly exposed to revenue volatility.

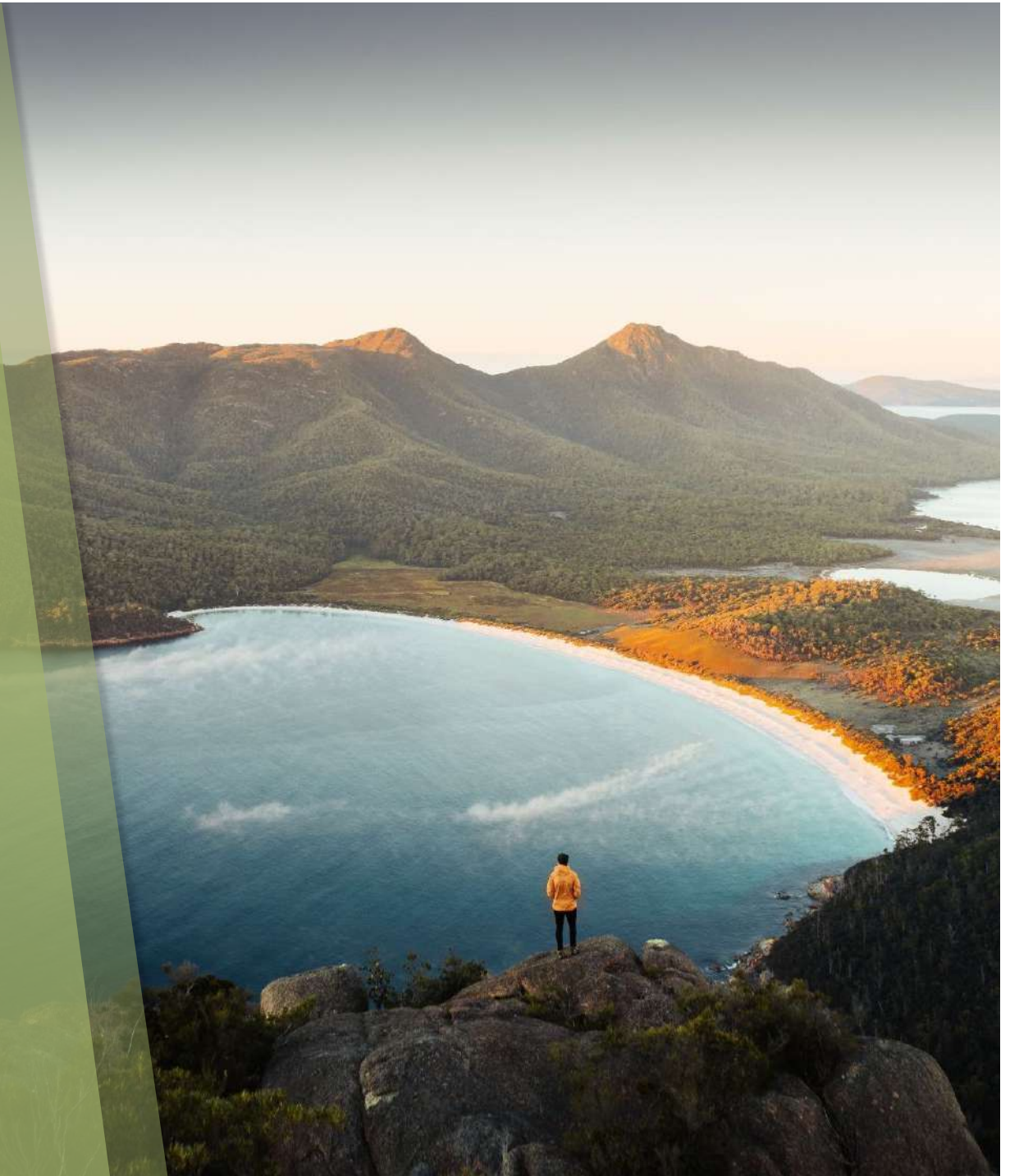
Targeted funding opportunities exist

Future rounds of the **Community Child Care Fund** and ongoing supports (e.g. Inclusion Support Program, EL3) present viable pathways for capital, expansion, and business planning.

Low-cost premises improve viability

Leveraging concessional school land and shared infrastructure reduces operating costs and increases sustainability.

PART B: EAST COAST DEMOGRAPHIC ANALYSIS

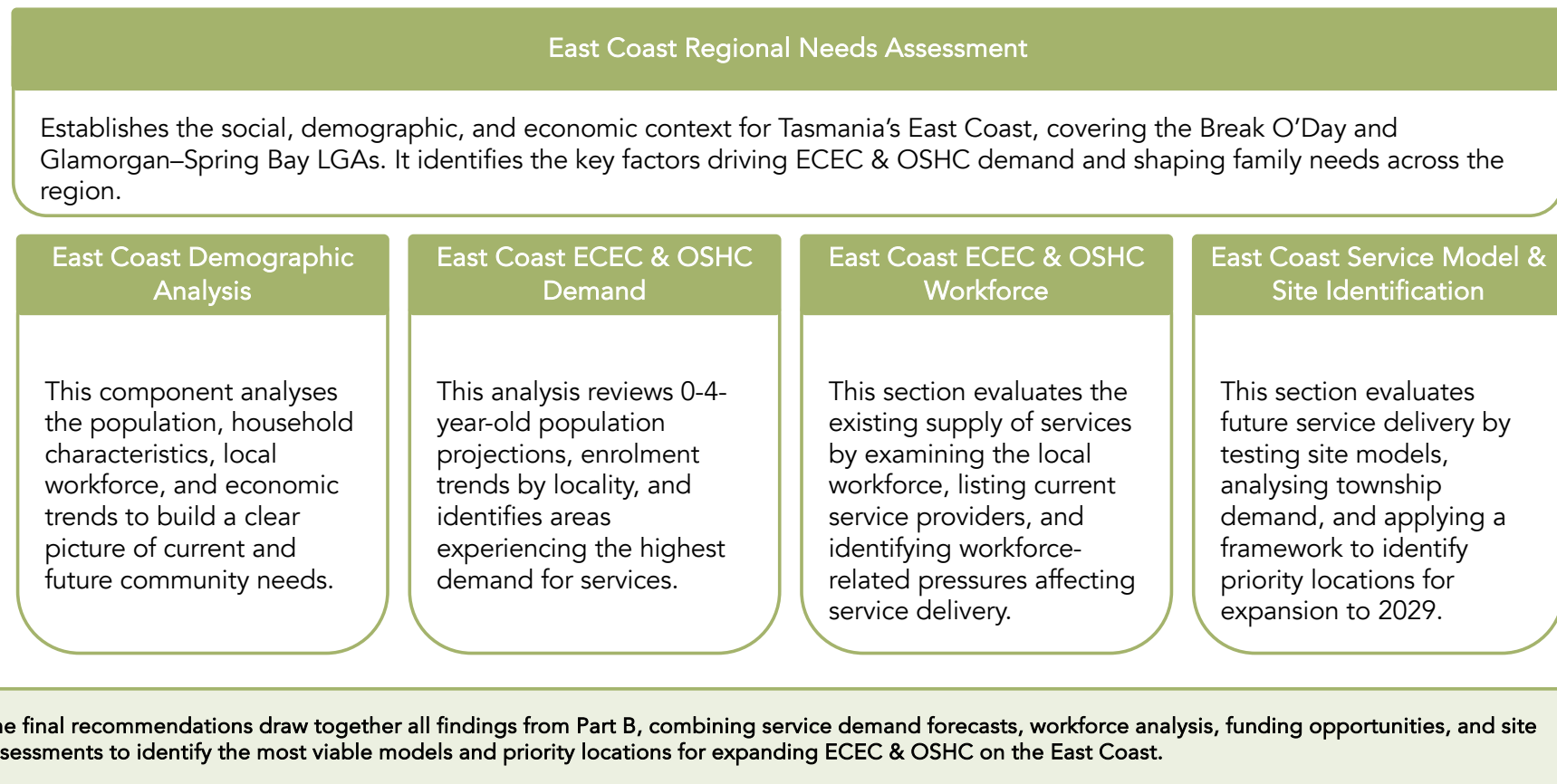


7.1 Part B Overview

Part B includes a comprehensive assessment of current and future ECEC & OSHC needs on the East Coast of Tasmania to inform service models, workforce opportunities, funding options, and potential site development

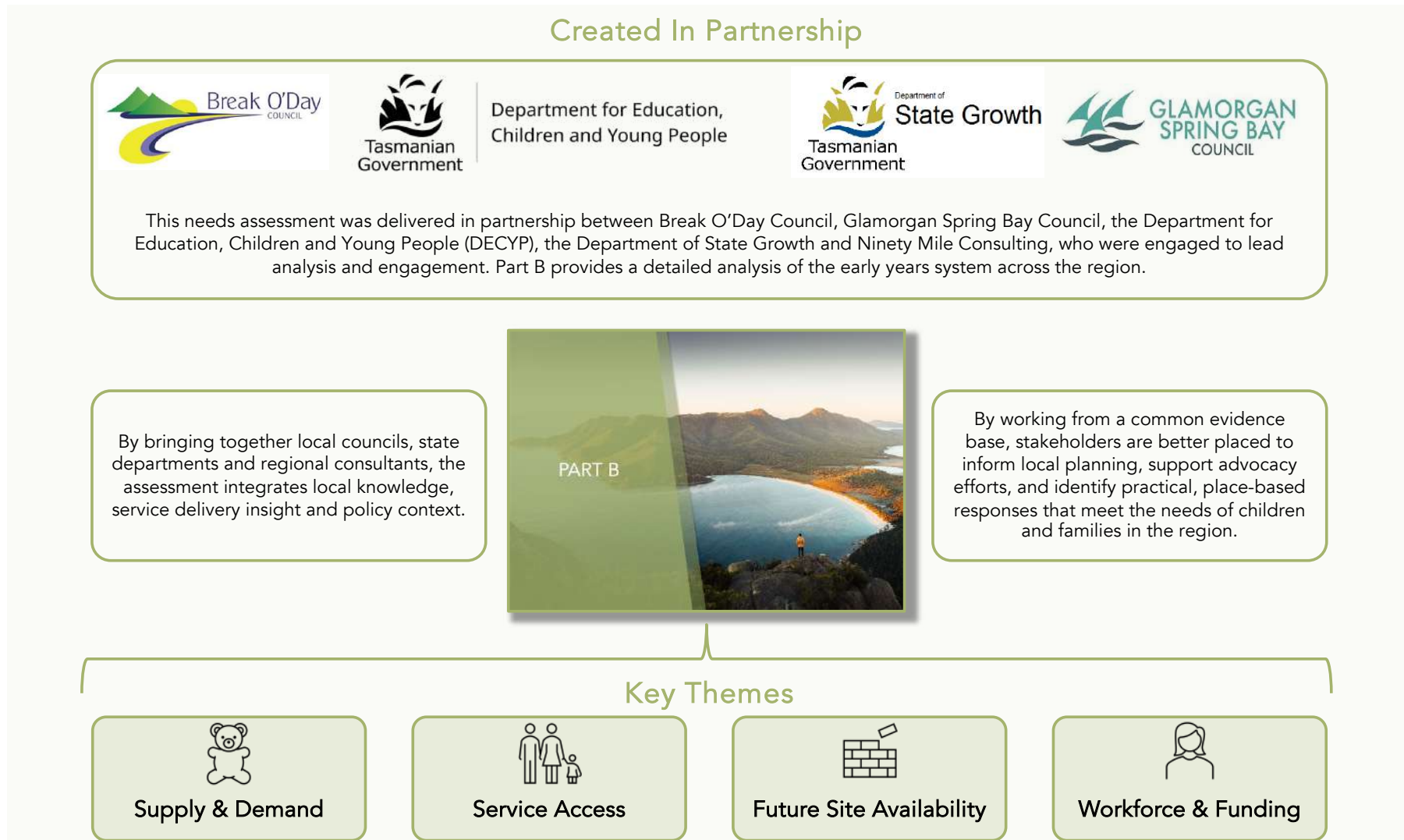
Methodology

This section outlines the structure and purpose of Part B of the St Marys & East Coast Childcare Needs Analysis. It sets out the evidence base and approach used to assess current and future ECEC & OSHC needs, identify and evaluate potential sites, and develop recommendations for future service delivery and investment.



7.2 Created In Partnership

This collaborative assessment provides an evidence-based analysis of early years services to guide local planning, addressing access, infrastructure, workforce, and funding needs



7.3 Goals and Activities

A mixed-methods approach delivered locally validated insights to assess the ECEC & OSHC needs on Tasmania's East Coast

Goals

Profile the East Coast region – demographic and economic trends

Assess Supply & Demand for ECEC & OSHC in the East Coast of Tasmania

Engage Stakeholders – local and state government, service providers, families, community groups

Identify Potential Service Sites, including feasibility of existing public assets

Analyse Workforce Dynamics – training, recruitment, retention, and funding/incentive landscape

Activities



38

Stakeholder consultations

(See Appendix for full consultation list)



30+

Documents analysed



Summit

East Coast ECEC Summit 2025



6 Centres

ECEC/OSHC workforce and enrolment data analysed



Scan

East Coast spatial, economic & workforce scan



Validation

Continuous, iterative feedback with key stakeholders

This project delivered a robust, evidence-based understanding of ECEC & OSHC needs across Tasmania's East Coast.

By combining demographic, spatial, and economic analysis with extensive local engagement, the approach revealed critical service gaps, workforce pressures, and seasonal demand fluctuations—particularly in tourism-reliant communities.

The findings are locally validated and provide a strong foundation for future service planning, site investment, and workforce development.



NMC at Glamorgan Spring Bay Council Offices

7.4 East Coast Demographic Snapshot

The East Coast is experiencing modest, migration-led growth alongside rapid ageing and declining child populations, with key townships emerging as service anchors

 Break O'Day COUNCIL	Major Townships % of LGA	Population Metrics	2021	2053
 3,552km²	St Helens (32.5%)	Estimated Population	6,770	7,795
	Scamander (12.5%)	Median Age	56 yrs	63 yrs
	St Marys (9.5%)	% Aged 0-4	3.8%	2.6%
		% Aged 65+	31.7%	45.3%
		Net Migration	N/A	+3,081
 GLAMORGAN SPRING BAY COUNCIL	Bicheno (20.0%)	Estimated Population	5,012	6,199
	Swansea (19.0%)	Median Age	57 yrs	65 yrs
	Triabunna (17.3%)	% Aged 0-4	3.1%	2.3%
		% Aged 65+	34.1%	40.7%
		Net Migration	N/A	+2,610

The East Coast's demographic future is defined by ageing populations and lower birth rates, with limited natural population growth. This leads to a projected reduction in demand for early years services over time, but **in-migration will sustain modest growth**—primarily in key townships. These service hubs will play an increasingly important role in meeting local needs. Strategic investment is required to future-proof early childhood infrastructure, workforce capacity, and service delivery in these priority locations.

Sources:

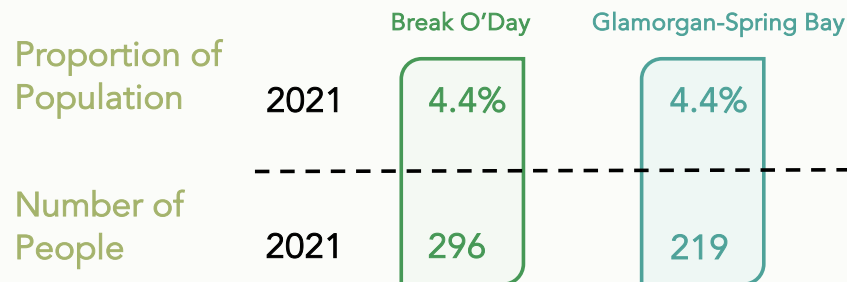
- Australian Bureau of Statistics
- Tasmanian Population Projections (TasPOPP) 2024
- Department of Treasury and Finance Tasmania
- Future Thinking: Demographic change in Break O'Day – Dr Lisa Denny

7.5 Aboriginal & Torres Strait Islander Population, Languages & Country of Birth

First Nations people make up 4.4% of the East Coast population—above the national average—while Glamorgan–Spring Bay shows greater cultural and linguistic diversity than Break O’Day



Aboriginal & Torres Strait Islander Population in the East Coast (2021)

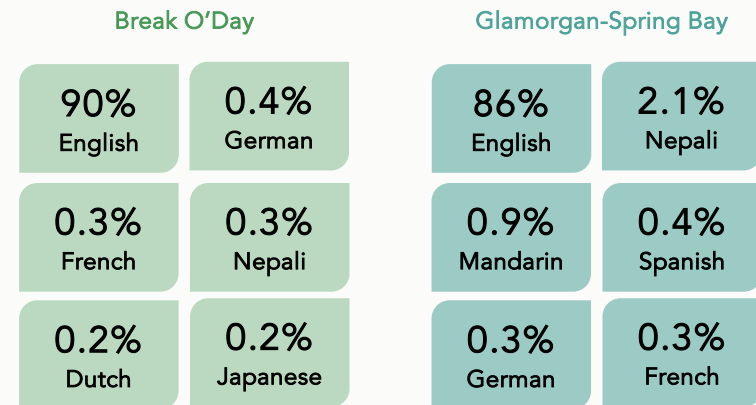


Country of Birth

	Country of Birth	Break O'Day	%	Glamorgan-Spring Bay	%
	Australia	5,334	78.8%	3,873	77.3%
	England	333	4.9%	210	4.2%
	New Zealand	110	1.6%	62	1.2%
	Germany	43	0.6%	–	–
	Philippines	35	0.5%	–	–
	Scotland	33	0.5%	–	–
	Nepal	–	–	107	2.1%
	India	–	–	29	0.6%
	China (excl. SARs and Taiwan)	–	–	25	0.5%



Languages Used at Home



Both LGAs have strong Aboriginal and Torres Strait Islander representation (4.4%), reflecting vibrant First Nations communities across the East Coast.

While Break O’Day’s migrant population is concentrated among English-speaking countries, Glamorgan–Spring Bay displays greater cultural and linguistic diversity, particularly through emerging Nepalese, Indian, and Chinese communities.

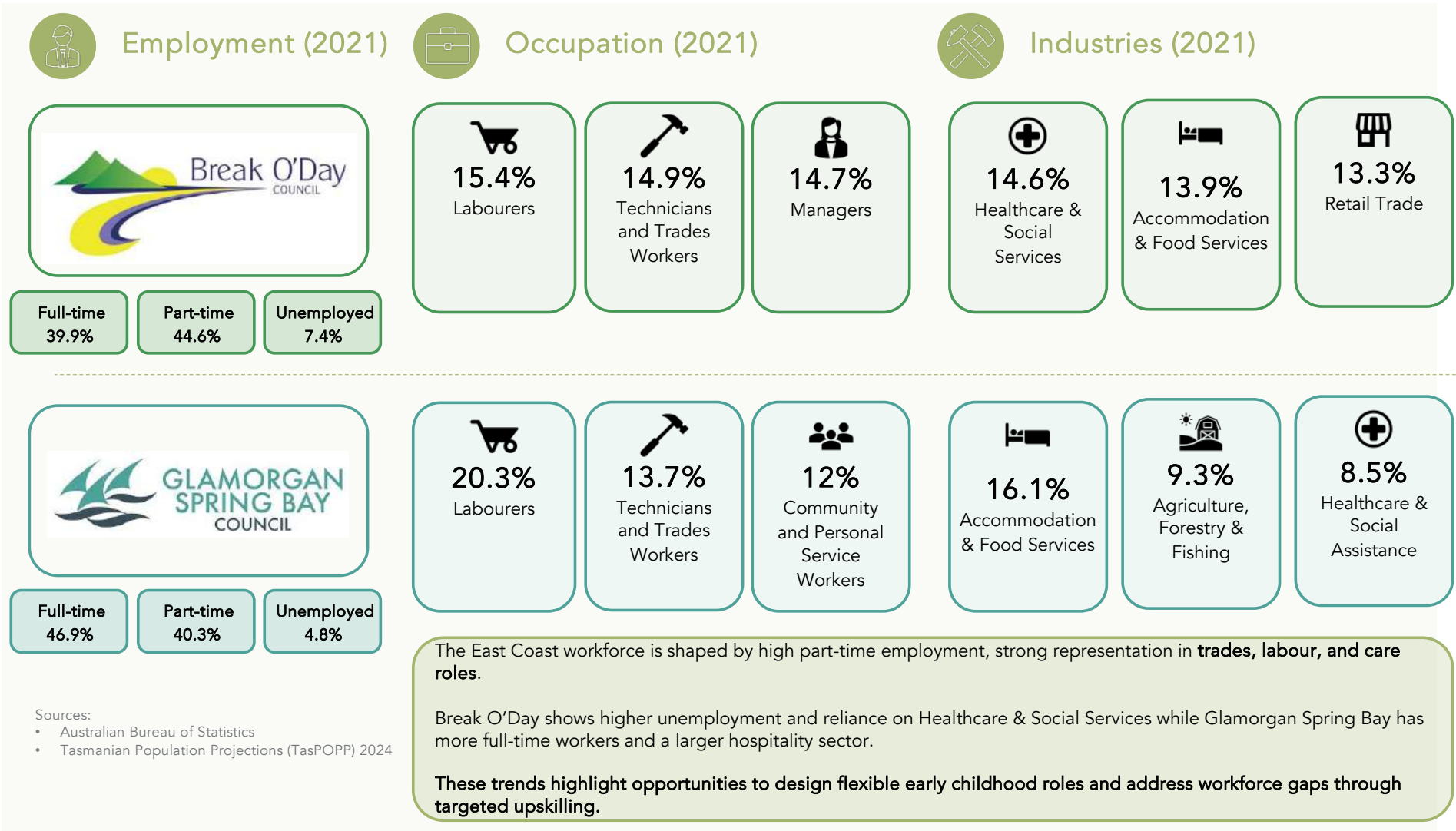
This highlights the need for inclusive service models and culturally responsive practices, especially in Glamorgan–Spring Bay.

Sources:

- Australian Bureau of Statistics
- Future Thinking: Demographic change in Break O’Day – Dr Lisa Denny
- Department of Treasury and Finance Tasmania

7.6 Key Industries & Employment

The East Coast of Tasmania is characterised by high part-time employment, strong representation in trades, labour, and community service roles, and higher unemployment in Break O'Day LGA



7.7 Economic and Infrastructure Constraints

Seasonal housing pressure, low incomes, and underdeveloped infrastructure in key towns are limiting ECEC & OSHC workforce retention, highlighting the need for targeted housing, economic, and facility investment



Residential Infrastructure

Metric	BOD	GSBC
% Unoccupied Dwellings	31.3%	31.2%
% Renting	20.6%	24.0%
Vehicles per Dwelling	2.1	1.9



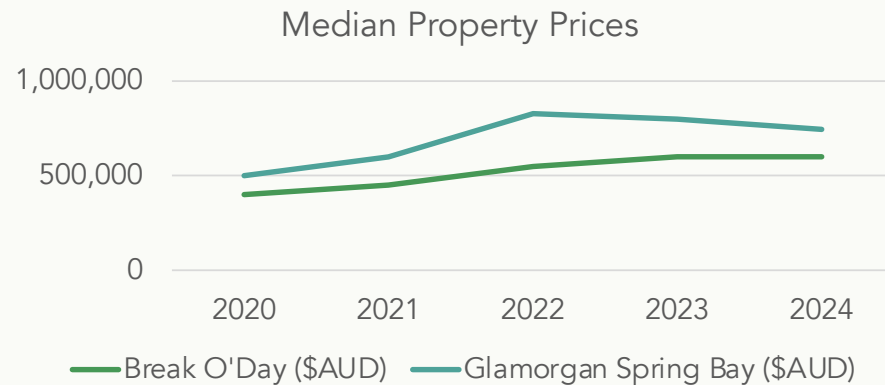
Median Income

	BOD	GSBC
Median HH Income	\$836/wk	\$1,005/wk

Township	LGA	Median HH Income
St Helens	Break O'Day	\$779/wk
Bicheno	Glamorgan–Spring Bay	\$1,030/wk
Triabunna	Glamorgan–Spring Bay	\$919/wk



Housing Prices



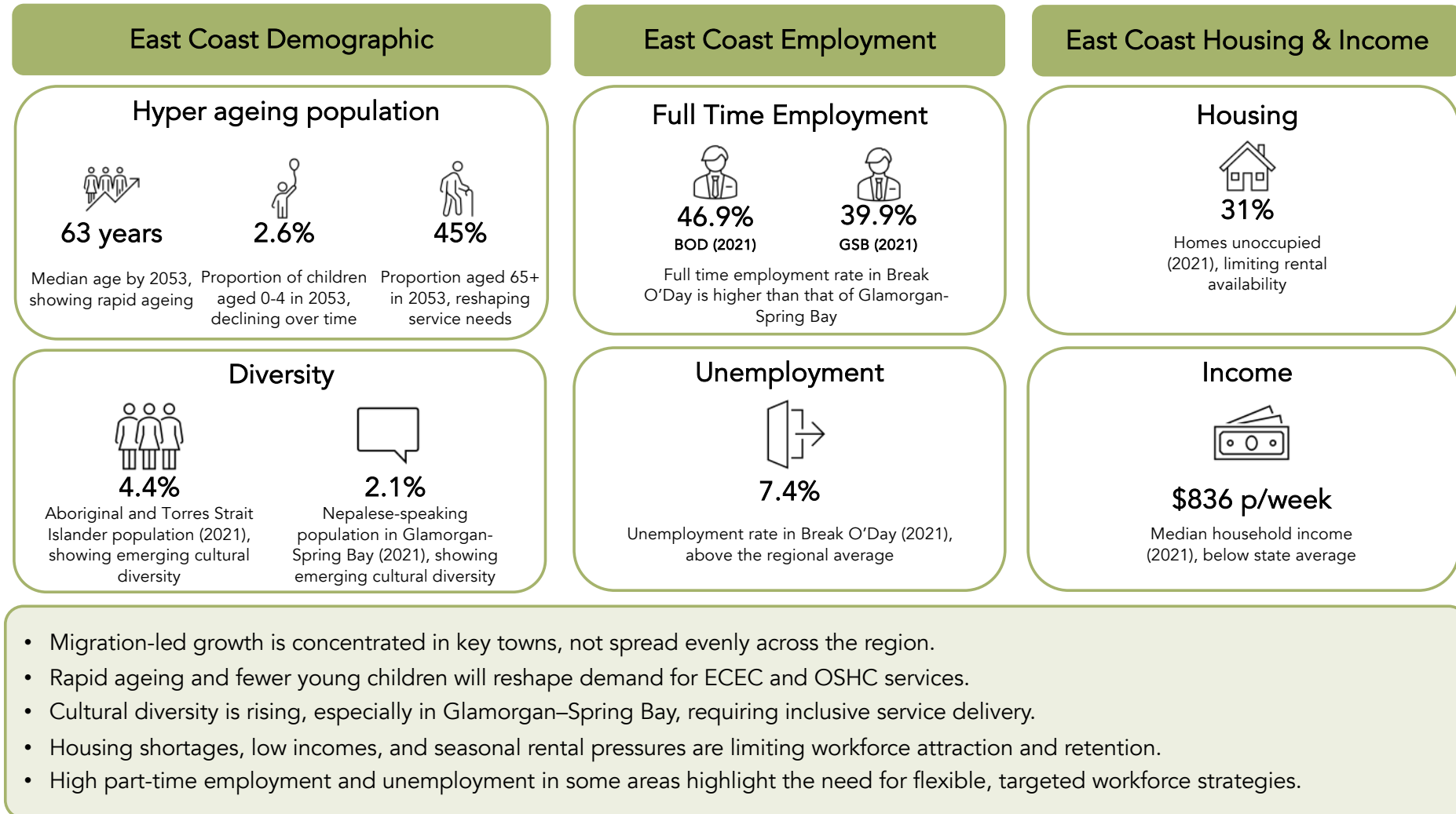
Across the East Coast, low incomes, seasonal rental shortages, and underdeveloped infrastructure are key constraints on workforce attraction and retention—particularly in towns like Swansea, Bicheno, and St Helens.

While Glamorgan–Spring Bay faces sharper property price increases, Break O'Day contends with lower household incomes and limited housing diversity.

These factors collectively challenge service affordability and the sustainability of the early years workforce, underscoring the need for coordinated investment in housing, economic development, and social infrastructure.

7.8 East Coast Demographic Analysis Summary

The East Coast faces migration-led growth concentrated in key towns, rapid ageing, rising diversity, housing and income constraints, and workforce challenges requiring targeted strategies



PART B: EAST COAST ECEC & OSHC DEMAND



8.1 East Coast ECEC & OSHC Demand Analysis Methodology

An overview of the upcoming sections within the demand analysis of East Coast ECEC & OSHC

Demand Analysis Methodology

Do current services meet the needs of families today, and what additional capacity will be required by 2029?

Through mapping services, analysing enrolment and access patterns, and forecasting future demand, this section identifies shortfalls and highlights where expansion and new models are most urgently needed.

1

Service Landscape Mapping

- Mapping of existing ECEC & OSHC services across the East Coast
- Analysis of provider distribution, licensed places, and service types

2

Enrolment & Access Patterns

- Examination of enrolment data from providers
- Identification of commuting patterns and service catchments
- Assessment of travel times between townships to understand access

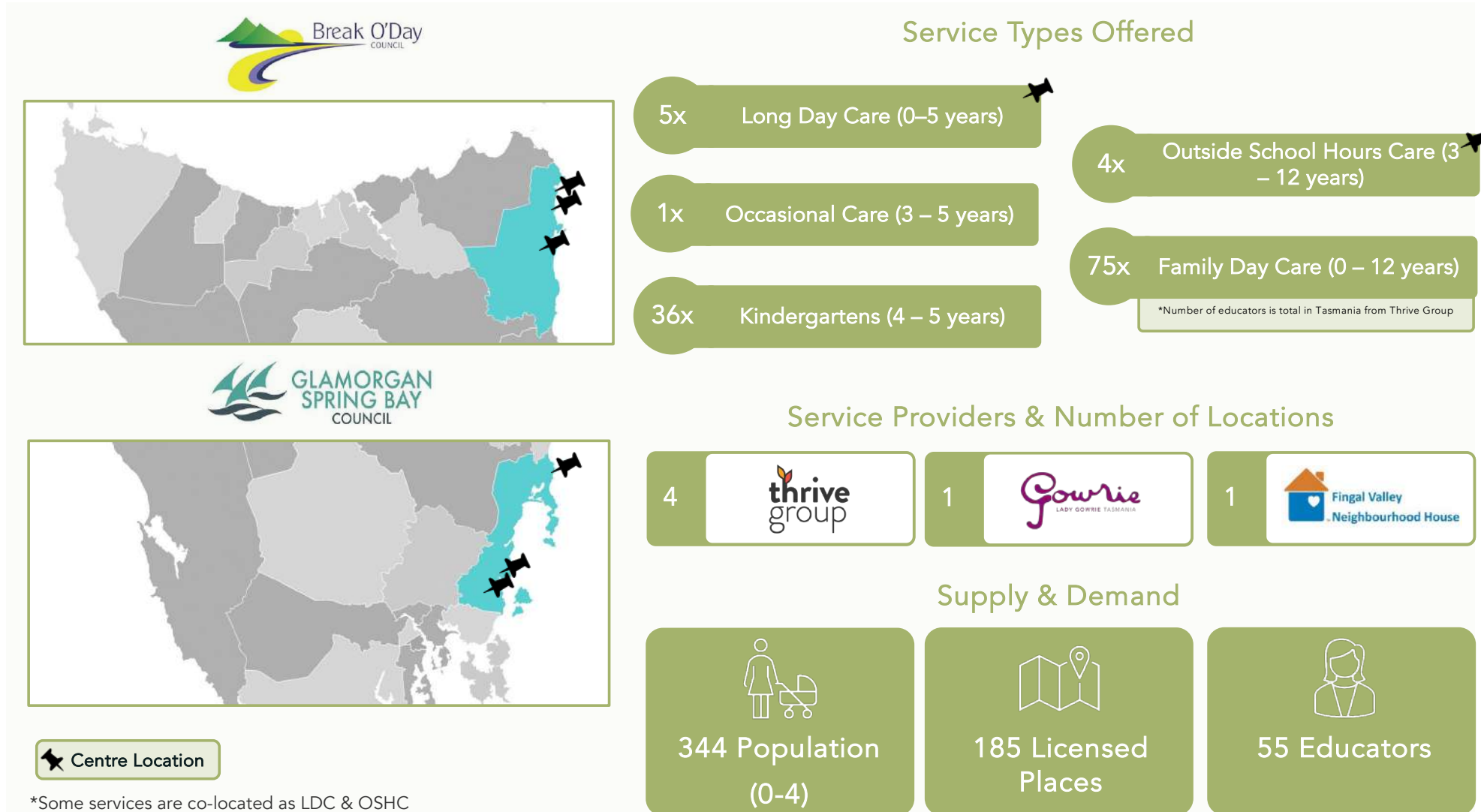
3

Demand Forecasting

- Modelling of current and future demand to 2029
- Application of educator-to-child ratios and average care day assumptions
- Identification of current shortfalls and projected future requirements
- Township-level and regional forecasts for service expansion needs

8.2 East Coast ECEC & OSHC Demand Snapshot

The East Coast of Tasmania has 10 Long Day Care (LDC), Outside School Hours Care (OSHC), and Occasional Care services across 6 locations—predominantly delivered by Thrive Group



8.3 East Coast LDC, OSHC & OC Current Capacity

There is a low number of providers offering long day care (LDC), outside school hours (OSHC), and occasional care (OC) across Tasmania's East Coast, with Thrive Group operating the majority of services

Service Providers on the East Coast:



Service	Organisation	Type of Service	Contact Hours	Licensed Places
St Marys ELS	Thrive Group	LDC	8:00 – 17:30	10
Bicheno ELS & OSHC	Thrive Group	LDC & OSHC	8:00 – 17:30	32
Triabunna ELS & OSHC	Thrive Group	LDC & OSHC	8:00 – 17:30	20
St Helens ELS	Thrive Group	LDC	7:30 – 18:00	46
St Helens OSHC	Thrive Group	OSHC	7:30 – 18:00	20
Swansea ELS & OSHC	Lady Gowrie Tasmania	LDC & OSHC	8:00 – 17:30	28
FVNH OC	Fingal Valley Neighbourhood House	OC	9:30-14:30 (Mon & Tues only)	9

Across the East Coast, **all services are not-for-profit community-based services** reflecting limited viability from private providers and strong local ownership.

Thrive operates the majority of services in the region, including all LDCs and OSHCs in St Marys, Bicheno, Triabunna, and St Helens.

St Helens ELS has the largest licensed capacity (46 LDC places), with the earliest and longest hours (7:30–18:00).

Most LDC services operate standard hours (8:00–17:30), with place numbers ranging from 10 (St Marys) to 32 (Bicheno).

Fingal Valley Neighbourhood House provides the only occasional care service, operating independently (not by Thrive) two days per week with 9 places.

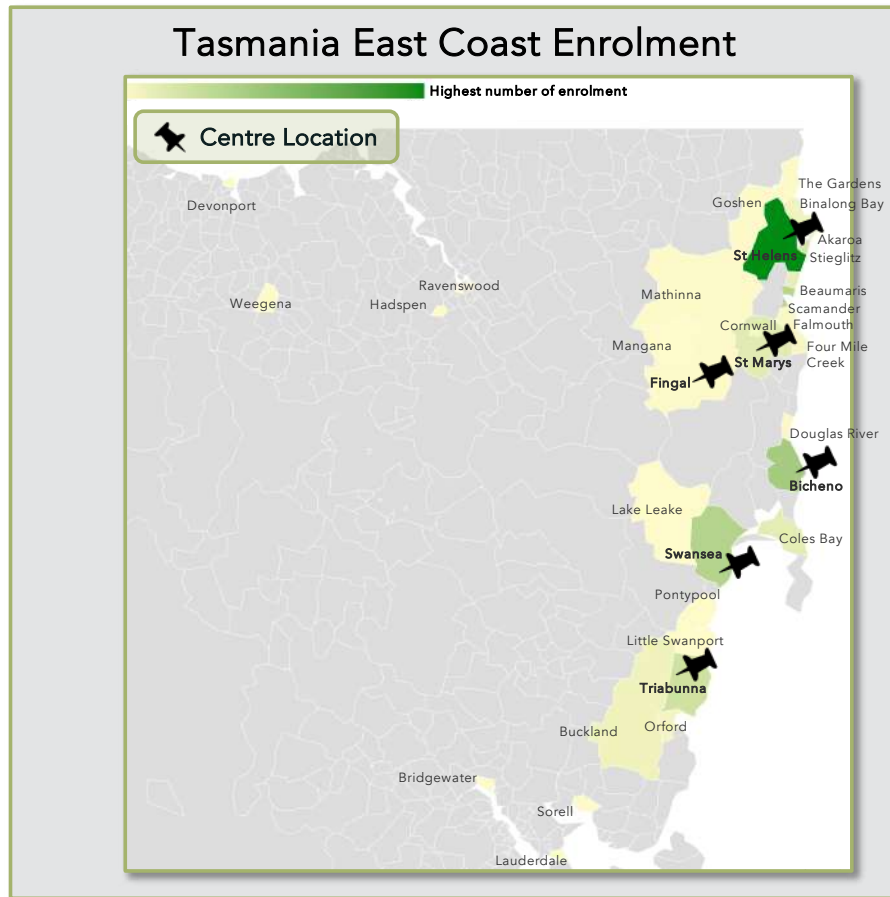
Swansea ELS & OSHC is operated by **Lady Gowrie Tasmania**, the **only major provider in the region other than Thrive**.

OSHC is available at five sites, typically co-located with LDCs, with licensed capacities of 20 places per site.

Family Day Care has been previously utilised to meet seasonal demand for education & care services. Despite this, there is limited information on future demand and Thrive has reported limited sustainability in running the services due to uptake across Tasmania.

8.4 Demand Overview by Suburb & Distance

Families access ECEC & OSHC where they work or plan to send children to school—primarily St Helens/St Marys—with emerging demand in Scamander–Beaumaris and low uptake in transient inland areas like Fingal



ECEC & OSHC enrolment data highlights how families access services across the East Coast. It reflects regional population movement, service availability, and family decision-making based on proximity to work, school, and long-term residence.

Key Insights

- St Helens is the regional hub, with 183 enrolments from over 20 towns, reflecting its central role in work and school commuting patterns.
- St Marys serves a smaller but localised group, with families often linking care to future schooling at St Marys District School.
- Bicheno and Coles Bay form a mid-coast cluster, while Triabunna and Swansea serve discrete southern communities.
- Fingal OC supports low-uptake, high-barrier families, including some ineligible for CCS-funded care.

Settlement Patterns

- Future demand is expected in Scamander–Beaumaris, driven by younger families moving in for rentals or land.
- Some inland areas (e.g. Fingal, Mangana) show low enrolment due to short-term residency and social housing turnover.

Travel Patterns

- Many families access services near employment or school hubs (St Helens or St Marys), not just where they live.
- Remote inland areas face access barriers, reinforcing the need for flexible or mobile service models.

St Helens and St Marys anchor enrolment around employment and schooling, not just residence.

Scamander–Beaumaris will likely drive future demand, suggesting a need to plan for service expansion or flexibility in this corridor.

Fingal and surrounds represent low-uptake, high-barrier populations, requiring tailored models like occasional care or outreach.

Enrolment patterns confirm strong **links between care access, stability of residence, and broader community infrastructure** (e.g. schools, transport).

Sources:

- Thrive Group Enrolment & Workforce Data
- Building Blocks Enrolment & Workforce Data
- Lady Gowrie Tasmania Enrolment & Workforce Data

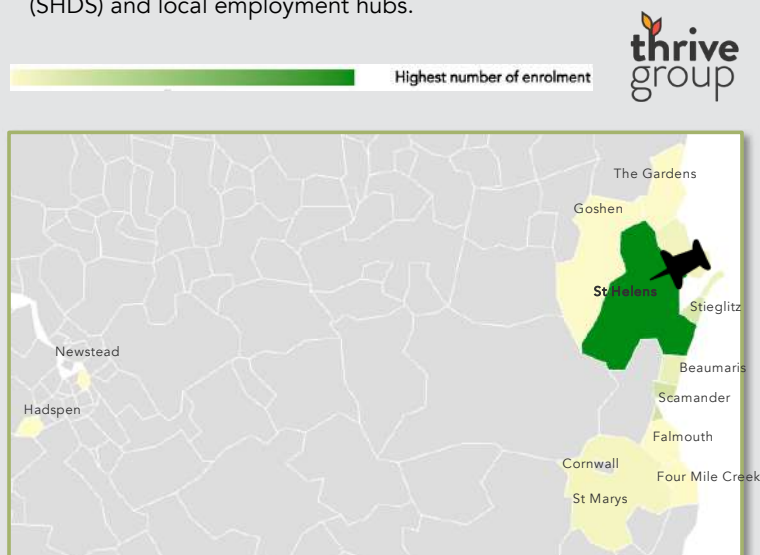
St Marys & East Coast Tasmania ECEC & OSHC Needs Analysis

8.5 St Helens Early Learning Service & OSHC Demand

St Helens Early Learning Service draws enrolment from a large geographical area

St Helens Early Learning Service & OSHC

St Helens ELS provides quality early childhood education and care for children aged 0-12 years, including long day care (LDC) and outside school hours care (OSHC). It supports local families with flexible, accessible ECEC & OSHC linked closely to St Helens District School (SHDS) and local employment hubs.



	2024	2025	2026	2027	2028	2029
St Helens & Surrounds (0-4)*	172	173	174	175	176	177
LDC & OSHC Enrolments	138	120**	130	131	131	132
Capacity (Licensed Places)	66	66	66	66	66	66
Optimal Licensed Places	110	96	104	105	105	106
Licensed Places Gap	44	30	38	39	39	40

- *St Helens & Surrounds includes Stieglitz, St Helens, Beaumaris & Scamander as these towns have the highest enrolment numbers at this centre.
- **Data collection occurred in mid-2025, figures for that year may be partial or incomplete.
- The additional places and educators are based on projected enrolments, a minimum of four care days per child, and an assumed average 1:7 educator-to-child ratio (average of 1:4, 1:5, and 1:10 ratios), to estimate FTE educators needed for optimal licensed capacity.
- See Appendix C for detailed supply/demand model.

Regional Anchor – St Helens ELS & OSHC serves a wide catchment, including Beaumaris and Scamander; families often prefer care near employment or future schooling

Capacity Gap – Licensed places (66) remain well below optimal demand (110 in 2024; 106 in 2029), leaving a persistent shortfall of ~40–44 places.

Enrolment Pressure – Enrolments exceed licensed capacity, indicating reliance on part-time/shared places; the 2025 drop likely reflects incomplete mid-year data rather than reduced demand.

Access Inequities – Inland and northern Break O'Day have few early childhood services, limiting local access.

Demand Drivers – Population growth is slowing, so future demand will depend more on service accessibility and quality than raw demographics.

8.6 Bicheno Early Learning Service & OSHC Demand

Bicheno Early Learning Service & OSHC facilitates enrolments tend to live in Bicheno or Coles Bay

Bicheno Early Learning Service & OSHC

Bicheno ELS provides long day care (LDC) and outside school hours care (OSHC) for families in Bicheno, Coles Bay, and nearby areas. With a focus on early education and community support, the service is a key part of family life for many in this tight-knit coastal region.



	2023	2024	2025	2026	2027	2028	2029
Bicheno & Coles Bay 0-4	62	63	64	65	66	67	68
LDC & OSHC Enrolment	72	61	36**	58	59	60	61
Capacity (Licensed Places)	32	32	32	32	32	32	32
Optimal Licensed Places	-	49	29**	46	47	48	49
Licensed Place Gap	-	17	-3**	14	15	16	17

- **Data collection occurred in mid-2025, figures for that year may be partial or incomplete.
- The additional places and educators are based on projected enrolments, a minimum of four care days per child, and an assumed average 1:7 educator-to-child ratio (average of 1:4, 1:5, and 1:10 ratios), to estimate FTE educators needed for optimal licensed capacity.
- See Appendix C for detailed supply/demand model.

Local Reliance – Bicheno primarily serves local families, with notable enrolments from Coles Bay (~30 minutes away).

Capacity Pressure – Licensed places (32) remain well below optimal demand (49 in 2024 and 2029), leaving a persistent shortfall of 17 places.

Enrolment Strain – Enrolments consistently exceed licensed capacity; the 2025 drop likely reflects incomplete mid-year data rather than reduced demand.

Expansion Potential – Stable population growth and a high catchment-to-population ratio point to clear potential for increasing licensed places.

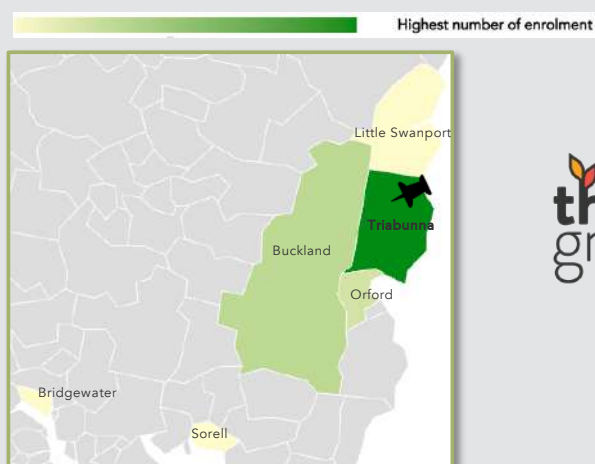
Sustained Demand – Even with modest 0–4 population growth, demand is expected to remain strong due to limited local alternatives and ongoing Coles Bay inflows.

8.7 Triabunna Early Learning Service & OSHC Demand

Most of Triabunnas enrolments come from within the township and adjacent areas

Triabunna Early Learning Service & OSHC

Triabunna ELS provides long day care (LDC) and outside school hours care (OSHC) to children across the southern part of Glamorgan Spring Bay. As the southernmost service in the region, it plays a crucial role in supporting families from both coastal and inland towns. The service offers long day care and OSHC, helping local parents balance work, education, and care responsibilities close to home.



	2023	2024	2025	2026	2027	2028	2029
Triabunna & Surrounds (0-4)*	54	55	56	57	58	59	60
LDC & OSHC Enrolment	44	44	32**	46	47	48	48
Capacity (Licensed Places)	20	20	20	20	20	20	20
Optimal Licensed Places	-	35	26	37	38	38	38
Licensed Place Gap	-	15	6	17	18	18	18

- *Triabunna & Surrounds includes Buckland & Orford as these towns have the highest enrolment numbers at this centre.
- **Data collection occurred in mid-2025, figures for that year may be partial or incomplete.
- The additional places and educators are based on projected enrolments, a minimum of four care days per child, and an assumed average 1:7 educator-to-child ratio (average of 1:4, 1:5, and 1:10 ratios), to estimate FTE educators needed for optimal licensed capacity.
- See Appendix C for detailed supply/demand model.

Southern Hub Role – Serves as a central hub for several smaller towns and rural communities, with most enrolments from Triabunna and nearby townships. Acts as a key service anchor for the southern Glamorgan Spring Bay region.

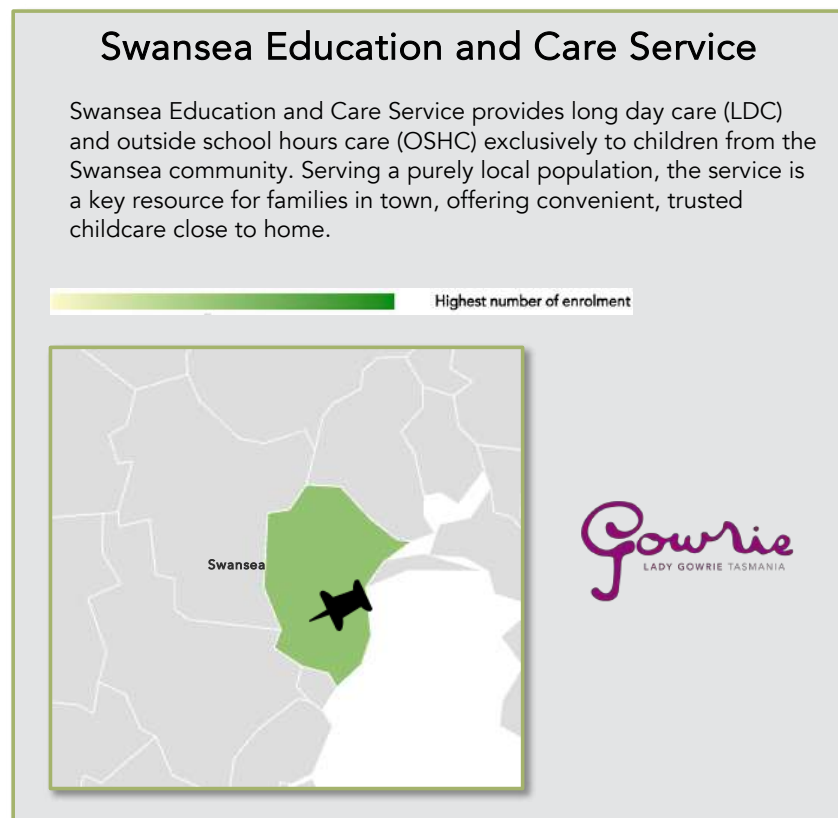
Capacity Misalignment – Licensed places (20) are considerably lower than optimal demand (35 in 2024; 38 in 2029), creating a deficit of 6–18 places.

Enrolment Requirements – Enrolment levels do not align closely with capacity, suggesting the expansion of the service is required to meet current and future needs.

Steady Demand – Steady population growth sustains the need for increasing the number of places available for children from Triabunna and surrounds.

8.8 Swansea Education and Care Service Demand

The Swansea Education and Care Service services only Swansea residents



	2025	2026	2027	2028	2029
Swansea (0-4)	24	25	25	25	26
LDC & OSHC Enrolment	54**	55	56	57	58
Capacity (Licensed Places)	28	28	28	28	28
Optimal Licensed Places	43	44	45	46	46
Licensed Place Gap	15	16	17	18	18

- **Data collection occurred in mid-2025, figures for that year may be partial or incomplete.
- The additional places and educators are based on projected enrolments, a minimum of four care days per child, and an assumed average 1:7 educator-to-child ratio (average of 1:4, 1:5, and 1:10 ratios), to estimate FTE educators needed for optimal licensed capacity.
- See Appendix C for detailed supply/demand model.

Purely Local Demand – Swansea ELS serves only local families, with no inflows from surrounding towns, likely due to transport constraints and strong community ties.

Capacity Constraints – Licensed places (28) are less than half of enrolled children (54+), creating a persistent and growing shortfall (15–18 places) and highlighting urgent need for expansion.

OSHC Pressure – Limited OSHC capacity (e.g., Lady Gowrie service with only 10 places) intensifies unmet demand for school-age care.

Direct Impact – Families are highly dependent on the service; any reduction or change in availability would disproportionately affect local access.

8.9 Top Areas of ECEC & OSHC Demand

ECEC & OSHC demand on the East Coast exceeds local supply, with key hubs like St Helens and Bicheno absorbing enrolments from multiple underserviced towns

Town	Nearest Hub	Travel	Service	Demand
St Helens	Local	–	LDC & OSHC (Thrive)	Very high – regional overflow
Bicheno	Local	–	LDC & OSHC (Thrive)	High – draws 3+ towns
Triabunna	Local	–	LDC & OSHC (Thrive)	High – services Orford & surrounds
Swansea	Local	–	LDC & OSHC (Lady Gowrie)	High – strong local uptake
Scamander	St Helens	20 min	None	High – >30 children enrolled elsewhere
Coles Bay	Bicheno	30 min	None	High – steady off-site enrolment
Stieglitz	St Helens	10 min	None	Med-High – consistent usage
Fingal	Local	–	Occasional care only	Medium – no long-day option
Little Swanport	Triabunna	25 min	None	Medium – uses Triabunna
Douglas River	Bicheno	20 min	None	Medium – off-site uptake
Cornwall	St Marys	20 min	None	Medium – small cohort enrolled
Orford	Triabunna	20 min	None	Medium – consistent demand
Pontypool	Triabunna	30 min	None	Low-Med – low base, isolated
Mangana	St Marys	30 min	None	Low – transient families, low enrolment
Four Mile Creek	St Helens	25 min	None	Low-Med – some enrolment evident

There is high demand for almost all LDC & OSHC service models within each centres township. Despite this, surrounding townships drive can drive between 10 – 30 minutes to reach a service.

Hubs under pressure: Services in St Helens, Triabunna, and Bicheno have some of the highest 0–4 enrolments on the East Coast. These sites absorb children from surrounding towns with no direct provision.

No services in key areas: Several localities (e.g. Scamander, Coles Bay) record 10–20+ enrolments despite having no licensed local provider.

Limited licensed capacity: In some cases (e.g. Bicheno 32 places), service usage is approaching or exceeding licensed capacity—suggesting tight scheduling or capped enrolments.

Seasonal & commuting load: Locations like Coles Bay and Douglas River show patterns of seasonal worker inflow or part-time enrolments not tied to residency, adding to service volatility.

LDC service demand outpaces capacity in Bicheno and St Helens, fuelled by both local enrolments and spillover from nearby towns with no provision.

OSHC shortfalls are widespread, particularly in Swansea and Triabunna, with families relying on single services to cover wide catchments.

No on-site provision exists in at least **9 localities**, with children travelling 20–30 minutes or more to attend care elsewhere.

Existing hubs are stretched: Services are absorbing more than just local children, affecting viability, waitlisting, and staffing pressure.

Sources:

- Thrive Group Enrolment & Workforce Data
- Building Blocks Enrolment & Workforce Data
- Lady Gowrie Tasmania Enrolment & Workforce Data
- Consultations

8.10 ECEC & OSHC Demand Summary

By 2029, urgent expansion is needed to ensure accessible and resilient services

ECEC & OSHC Demand by Township

Projected demand to 2029 shows widening gaps across most East Coast centres, with several towns requiring significant expansion to keep pace with community needs.

Location	Current Licensed Places (2025)	Optimal Licensed Places (2029)	Additional Licensed Places (2029)
St Helens	66	106	+40
Bicheno	32	49	+17
Triabunna	20	38	+18
Swansea	28	46	+18
St Marys*	10	29	+19

Refer to Appendix C for full demand requirements methodology

*Please see Part A of this document for detailed St Marys forecasting

St Helens remains the *anchor town*, but its persistent 40-place gap shows the limits of relying on one regional hub. The current model concentrates too much demand here, forcing families from inland and coastal areas to travel.

St Marys demonstrates the risks of under-investment in inland services. Despite a small local child population, its role as a service hub (especially for Scamander) creates demand beyond its 10 licensed places. The data confirms consultation feedback that St Marys requires more places and a sustainable workforce strategy, otherwise shortfalls will continue. Additionally, St Marys required 39 optimal licensed places in 2024 demonstrating the need to account for fluctuations.

Bicheno and **Swansea** illustrate how *single-service towns* are highly vulnerable. With no alternatives nearby, even modest shortfalls (15–17 places) translate into major community impacts, especially for workforce participation and family stability. These towns present clear expansion opportunities, but also highlight the need for resilient, multipurpose infrastructure.

Triabunna's role as the southern hub, with the service originating from the community itself, is undermined by a persistent 18-place gap, with only 20 licensed places against demand for 38, leaving little buffer for growth or change.

Assumptions:

- Tasmania educator-to-child ratios applied are:
 - 0-24 months — 1 educator : 4 children
 - 24-36 months — 1 educator : 5 children
 - 36+ months — 1 educator : 10 children
- Children optimally require at least 4 days of care
- Average educator to child ratio is 1:7

8.11 Engagement Outcomes

Consultations revealed core themes around access, workforce, infrastructure, and service clarity

Based on 35+ consultations with 18 organisations, across 10 townships key early learning challenges and solutions emerged. Themes include workforce and infrastructure gaps, and opportunities for integrated hubs, mobile models, and local training. The following quotes reflect the voices that shaped this analysis

Engagement Groups

Education and Care Providers

- Lady Gowrie Tasmania
- Thrive Group
- Building Blocks / Fingal Valley Neighbourhood House

Primary and Secondary Schools

- St Marys District School
- Swansea Primary School

Health and Child Development Services

- Break O'Day Child and Family Centre
- St Marys Community Health Centre
- Emerge Allied Health

Local Government

- Break O'Day Council
- Glamorgan-Spring Bay Council

State Government Departments

- Department for Education, Children and Young People
 - Early Childhood Inclusion Service
- Department of State Growth

Community, Employment and Planning Organisation

- Asuria Australia
- Cykel Architecture
- Break O'Day Employment Connect

Tertiary Education

- University of Tasmania



Key Findings

"You can't **retain** educators if they have to **drive 30km every day** and still can't find a rental."

"In some towns, people still think 'kindy' starts at three. That's how **confusing** the system is here."

"The Neighbourhood Houses are **holding this system together**, but they're not built for licensed care."

"There's **no infant care, no OSHC** where we live, and the nearest service is full. We just do what we can – or go without."

"We've got families **willing to relocate just to access better school** and childcare options. That tells you how urgent this is."

For a full summary of consultation findings, please see Appendix B

St Marys & East Coast Tasmania ECEC & OSHC Needs Analysis

8.12 East Coast ECEC & OSHC Demand Summary

East Coast childcare demand is uneven, with major shortfalls in St Helens, St Marys, Bicheno and Swansea, leaving families reliant on overstretched hubs and limited local options

Section Summary



The demand analysis shows that current ECEC & OSHC services **do not fully meet family needs today, with the sharpest gaps in St Helens, St Marys, Triabunna, Bicheno, and Swansea.**

Reliance on single providers and regional hubs forces families to travel long distances or go without care, leaving many inland and coastal towns underserved.

Looking ahead, by 2029 a significant expansion of places, new service models, and stronger regional planning will be required to ensure services can keep pace with demand.

St Helens is overstretched

As the regional anchor, it faces a persistent shortfall of ~40 licensed places, absorbing demand from multiple towns.

St Marys is under-resourced

A 10 licensed place centre with strong enrolments from Scamander and surrounding towns. A shortfall of +19 places highlights need for expansion.

Bicheno and Swansea face critical gaps

Both towns rely on single services; shortfalls of 15–17 places leave families without alternatives.

Triabunna requires expansion

Demand exceeds current and future supply; small demographic shifts could further exacerbate shortages.

Access is uneven across the region

Families in towns like Scamander, Coles Bay, and Orford travel 20–30 minutes for care, showing gaps in local service coverage.

OSHC shortfalls are widespread

Services in Swansea and Triabunna are particularly stretched, leaving school-aged care unmet.

An aerial photograph of a coastal town, likely in New Zealand, featuring a large bay with several sailboats, a residential area with houses and trees, and a commercial area with larger buildings and parking lots. In the background, there are rolling hills and mountains under a blue sky with scattered white clouds. A semi-transparent green overlay covers the left side of the image, containing the event title in white text.

PART B: EAST COAST ECEC & OSHC SUMMIT 2025

9.1 East Coast ECEC & OSHC Summit 2025 Overview

The Summit brought together over 30 stakeholders to validate findings and co-design solutions for strengthening ECEC & OSHC across the East Coast

Methodology

Purpose

- The East Coast ECEC & OSHC Summit (27 August 2025, Swansea) was convened to validate demand projections and co-design solutions with local and state stakeholders.
- Participants tested the Needs Analysis findings against local service realities and provided guidance on strategic priorities.

Approach

- NMC presented key findings on demographics, enrolments, and workforce data.
- Two rounds of group discussions explored challenges and potential solutions, structured around a four-pronged framework: infrastructure, capacity, location & service delivery, and workforce.
- The summit concluded with a final discussion focused on key takeaways and practical steps to bring the strategies to life.

Attendees

Over 30 participants attended, representing a diverse mix of stakeholders across the ECEC & OSHC sector, including:

- **Councils** – Break O'Day, Glamorgan–Spring Bay
- **State Government** – DECYP, State Growth, Skills Tasmania
- **Providers** – Thrive Group, Lady Gowrie Tasmania, Building Blocks / Fingal Neighbourhood House
- **Training bodies** – CUC Eastern Tasmania, TasTAFE
- **Schools & community** – St Marys District School, Swansea Primary, Neighbourhood Houses, NDIS, B4 Early Years Coalition.



East Coast ECEC & OSHC Summit 2025

The Summit demonstrated the value of bringing diverse stakeholders together — validating data with lived experience and confirming a shared commitment to finding practical, regionally tailored solutions for ECEC & OSHC.

9.2 East Coast ECEC & OSHC Summit 2025 Challenges Discussion

Participants highlighted critical issues across infrastructure, workforce, service delivery, and location that impact access and quality

Challenges Identified

Participants identified and validated a series of critical challenges across infrastructure, capacity, workforce, and service delivery, highlighting the systemic and place-based barriers limiting access to ECEC & OSHC.



Infrastructure

- Participants noted funding and capital works as a **major barrier**.
- **Lack of multipurpose, co-designed centres** and poor site availability.
- Transport and accessibility issues limit service reach.
- Large-scale builds are not viable in low-demand towns; small providers face viability issues.



Capacity

- Desired ECEC & OSHC Demand for 3–4 days/week **exceeds available resources**.
- Families face barriers linked to transport, affordability, and mental health.
- No Family Day Care available on the East Coast.
- Growth areas (e.g. Coles Bay) lack planning for ECEC & OSHC services.



Service Deliver & Location

- Long travel times and lack of affordable transport restrict access.
- Limited OSHC resourcing and no Family Day Care options.
- Participants noted **confusing access pathways** for families and lack of innovation in delivery.
- Not-for-profit, community-based services dominate the East Coast, underscoring the lack of viability for private providers.



Workforce

- Participants identified **attrition from burnout, paperwork, and low pay**.
- Recruitment and retention are undermined by poor flexibility, housing shortages, and transport challenges.
- Educators' own children lack care access, creating further stress.
- ECEC & OSHC roles are undervalued, with low awareness of training pathways and weak long-term visa retention.

Workforce shortages, infrastructure limitations, and uneven service access remain the central challenges across the region, placing increasing pressure on services and requiring coordinated, region-wide solutions to meet growing demand.

9.3 East Coast ECEC & OSHC Summit 2025 Solutions Discussion

Strategic solutions were co-developed to address challenges, strengthen services, and guide future ECEC & OSHC planning

Solutions Identified

Participants co-designed a suite of solutions and emphasised strategic insights, noting that ECEC & OSHC must be integrated with housing, workforce, and town planning priorities to secure liveability and growth for the region.



Infrastructure

- Participants proposed **smaller, flexible builds** in towns such as St Marys and Bicheno.
- **Co-location with schools and health hubs** was seen as a way to lower costs and improve access.
- **Multipurpose spaces** tailored to rural needs were identified as critical for liveability.



Capacity

- A **regional supply and demand roadmap** was recommended to guide future planning.
- **Outreach and mobile models** were suggested, with Fingal's Building Blocks noted as a proven example.
- Participants highlighted that **growth hubs (St Helens, St Marys, Swansea, Bicheno)** must be prioritised.



Service Deliver & Location

- Participants stressed the need to **improve pay, mentoring, and flexible conditions** to retain staff.
- **Strengthening local training pipelines** through Lady Gowrie, TasTAFE, and CUC was identified as vital.
- Building a **sustainable local workforce** was seen as essential for regional growth.



Workforce

- Participants called for expansion of **wraparound supports** such as the Safe Haven model.
- **Raising awareness** of available options and promoting **multi-stakeholder partnerships** were seen as priorities.
- **Councils were identified as pivotal** in aligning ECEC & OSHC with housing, population, and town planning.

Participants emphasised that addressing East Coast needs requires smaller, flexible infrastructure, stronger local workforce pipelines, expanded wraparound services, and a coordinated regional roadmap to prioritise growth hubs like St Helens, St Marys, Swansea, and Bicheno.

9.4 East Coast ECEC & OSHC Summit 2025 Summary

The Summit validated critical challenges in capacity, infrastructure, and workforce, while co-designing practical solutions to strengthen ECEC & OSHC across the East Coast

Section Summary



The Summit confirmed that capacity gaps, infrastructure limits, and workforce shortages are the most pressing barriers to ECEC & OSHC. Participants highlighted smaller, flexible builds, stronger local training pipelines, and coordinated regional planning as practical solutions, underscoring the need for collective action to secure liveability and growth on the East Coast.

Capacity gaps remain the most pressing issue

St Helens, St Marys, Bicheno, and Swansea all need major expansion to meet demand.

Infrastructure is constrained

Funding, land, and transport barriers prevent services from scaling.

Workforce shortages persist

Low pay, high attrition, and weak training pathways limit service growth.

Flexible service delivery is key

Smaller centres, co-location with schools/health, and multipurpose hubs fit rural needs.

Local pipelines must grow

Better pay, continued mentoring, and training via Lady Gowrie, TasTAFE, and CUC are essential.

Regional coordination is critical

A supply/demand roadmap and partnerships are needed to align services with housing and population growth.

PART B: EAST
COAST ECEC &
OSHC
WORKFORCE

10.1 East Coast ECEC & OSHC Workforce Methodology

An overview of the upcoming sections within the workforce analysis of East Coast ECEC & OSHC

Workforce Analysis Methodology

Does the current workforce have the capacity, skills, and pathways needed to meet future demand?

By examining educator supply, distribution, training supports, and projected requirements, this section provides the evidence needed to identify gaps and plan for a sustainable workforce to 2029.

1

Workforce Supply & Composition

- Analysis of educator numbers, qualifications, and team sizes across all East Coast centres
- Identification of reliance on small teams, limited Bachelor-qualified staff, and commuter workers

2

Workforce Distribution & Dynamics

- Mapping where educators live and how far they travel to work
- Examination of casual pool limitations, attrition rates, and reliance on flexible staffing models

3

Training Pathways & Supports

- Review of traineeships, mentoring, and study hubs provided by organisations such as Lady Gowrie, TasTAFE, and CUC Eastern Tasmania
- Assessment of barriers to qualification completions and the effectiveness of local training access

4

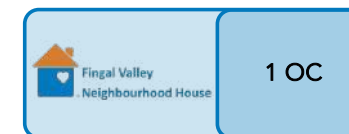
Future Workforce Requirements

- Forecasting of educator needs to 2029 based on projected enrolments and ratio requirements
- Identification of town-specific workforce gaps, highlighting priority areas such as St Helens, St Marys, and Swansea

10.2 Workforce Supply & Education Levels

Early childhood services on the East Coast operate with small teams, primarily composed of Certificate III and Diploma-qualified educators. Bachelor-qualified staff are present in half of all sites

Service Providers on the East Coast:



The East Coast ECEC & OSHC workforce is upheld by committed local educators who provide flexibility and continuity across towns, but remains stretched by small teams, limited qualified staff, and reliance on commuting workers

Service	Provider	#Other Staff	#Cert III Staff	#Diploma Staff	#Bachelor Staff	Attrition 2023/2024	Total Staff
St Marys ELC	Thrive	0	2	4	0	5	6
Bicheno ELC	Thrive	0	8	4	0	9	12
Triabunna ELC	Thrive	0	6	1	0	9	7
Triabunna OSHC	Thrive						
St Helens ELC	Thrive	0	9	6	1 (ELC Only)	6	16
St Helens OSHC	Thrive						
Swansea	Lady Gowrie Tasmania	0	4	4	1	N/A	9
Fingal Valley	Fingal Valley Neighbourhood House	3	0	2	0	N/A	5
Total		3	29	21	2	29	55

St Helens has the largest and most qualified workforce, with 16 ECEC & OSHC staff across LDC and OSHC, including 21 Diploma educators and the BODC region's only Bachelor-qualified teacher.

Most other centres are thinly staffed, with 5–7 total educators—creating high exposure to staff absence and limited capacity to expand or adapt services.

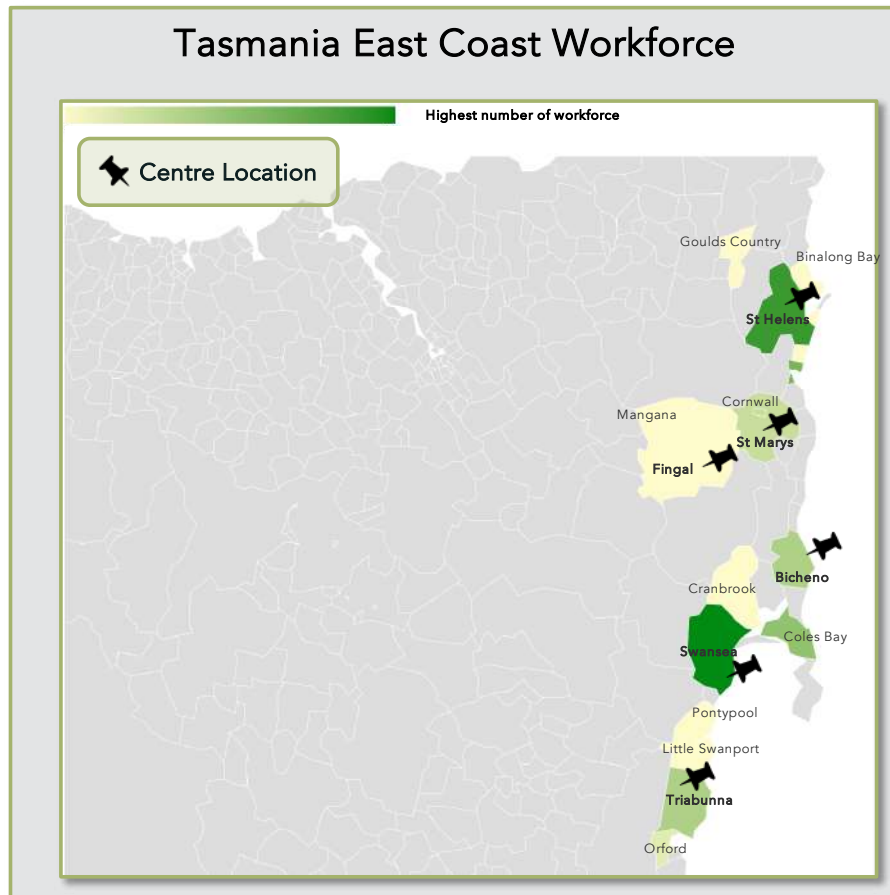
Cert III educators are concentrated in St Helens (9) and Bicheno (8); smaller towns rely on minimal teams with limited qualification depth.

Workforce gaps in small towns, combined with few tertiary-qualified teachers, limit access to higher-quality programs and create operational fragility.

Workforce instability occurs at all East Coast centres, this is reflective of the wider sector across Australia and is commonly due to low sector pay and burnout.

10.3 Supply Overview by Suburb & Distance

The East Coast ECEC & OSHC workforce is locally based but stretched, relying on flexible models and online training amid ongoing challenges in recruitment, retention, and access to qualified staff



Sources:

- Thrive Group Enrolment & Workforce Data
- Building Blocks Enrolment & Workforce Data
- Lady Gowrie Tasmania Enrolment & Workforce Data
- Consultations

St Marys & East Coast Tasmania ECEC & OSHC Needs Analysis

East Coast early learning services face persistent staffing challenges driven by limited local supply, high attrition, and reliance on commuting workers. Despite this, services are supported by a flexible workforce familiar with online training and adaptable care models.

Workforce Dynamics

- Most educators live locally, especially in St Helens, Triabunna, and St Marys. However, centres like Bicheno rely on long-distance commuters from Hobart suburbs (e.g. Tarooma, Lutana).
- Recruitment is constrained by a shallow training pipeline — fewer than 5 Cert III completions/year in north east Tasmania — and visa, housing, and transport barriers.

Current Workforce Strategies

- The use of “Family Grouping” (multi-age care) enables staffing flexibility and supports continuity in smaller centres.
- Sharing staff across services allows centres to stay open when they would otherwise fall short of required ratios.

Most centres depend on local staff, but some rely on permanent and casual long-distance commuting due to local shortages.

Limited casual relief pool, as Thrive Group run most of the centres across the East Coast, they supply casual relief staff during shortages but more staff are needed, causing centres to close for days at a time.

76% of staff travel under 20 minutes to work, meaning recruitment efforts should be focused within a 20km radius.

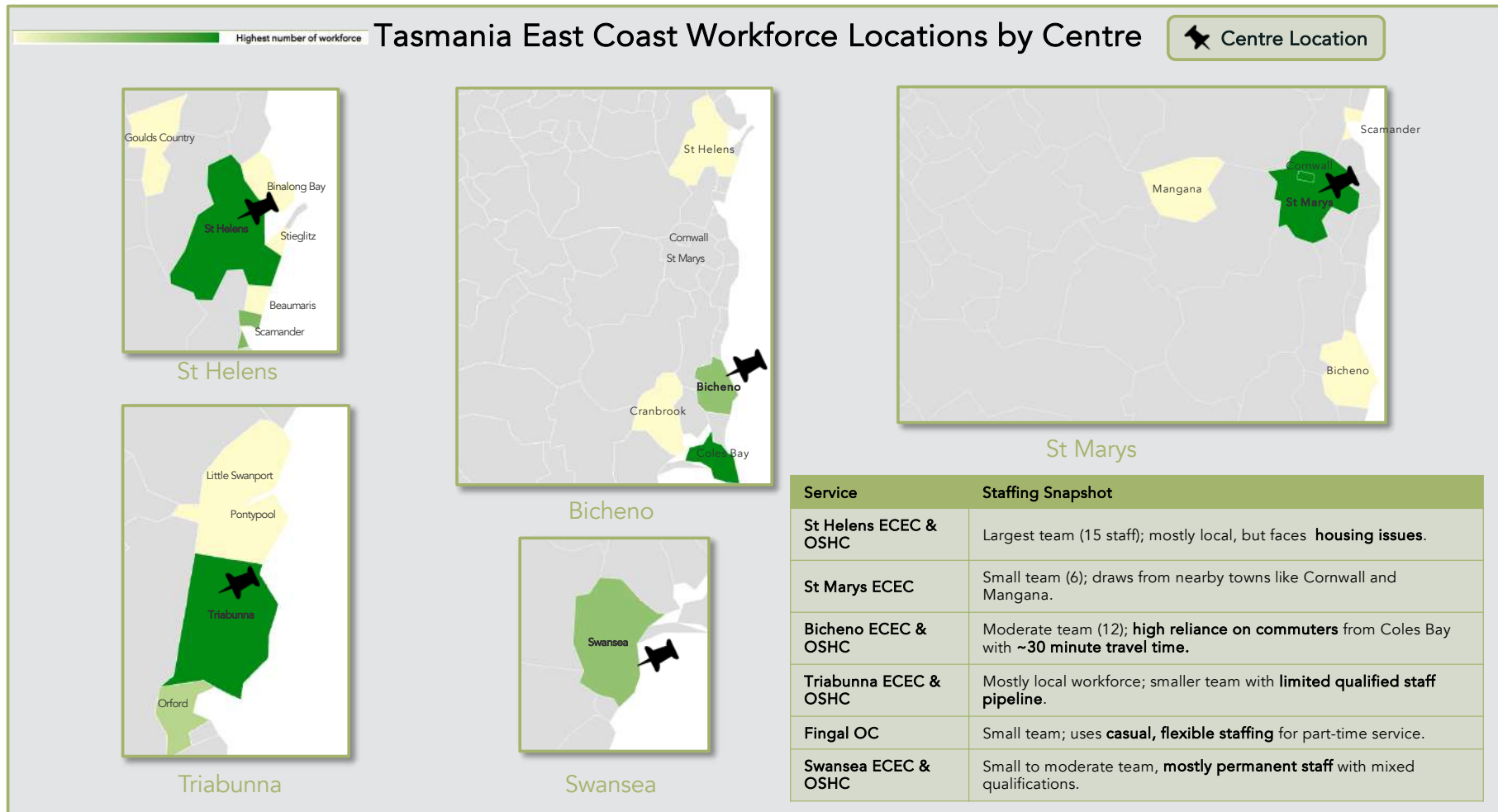
Online training is commonly utilised, due to lack of local qualification access.

Recruitment is constrained by workforce availability, housing, and transport.

Building a **sustainable workforce** will require **local training access, housing incentives, family groupings for children attending centres, and support for career pathways.**

10.4 Supply Deep Dive by Suburb & Distance

Staffing across services varies from small, flexible teams to larger local or commuter-based workforces, with common challenges including retention, housing, and limited qualified staff pipelines



Sources:

- Thrive Group Enrolment & Workforce Data
- Building Blocks Enrolment & Workforce Data
- Lady Gowrie Tasmania Enrolment & Workforce Data

St Marys & East Coast Tasmania ECEC & OSHC Needs Analysis

10.5 Workforce Training & Support

Clear pathways for educators include traineeships, online/in-person/hybrid training, mentoring and study hubs



- Delivers **Certificate III and Diploma** qualifications in ECEC.
- Training is primarily online, which can limit accessibility for East Coast students without strong digital or study supports.



- Runs a **traineeship** model combining on-the-job learning with **RTO training** (online, in-person, Hobart travel, and RTO visits to Swansea).
- Provides **unaccredited professional learning** for managers and staff.
- Offers a **trainee coordinator** to support and answer questions.



- Employ a **project officer** to guide staff through training and placements.
- Offers **mentoring** and sector orientation for new educators.
- Provides **on-the-job traineeships** across its East Coast centres.



- Runs a **mobile early learning service** that introduces families and educators to early years learning.
- Provides **entry pathways** for return-to-work parents, creating local opportunities to study and train.
- Offers childcare and learning environments where trainees can gain **practical experience**.



- Provides **free career coaching, job search, and training support** for jobseekers.
- Offers **recruitment services for employers** and connects local people with local jobs.
- Runs **outreach in communities (such as GSBC LGA) and businesses** to improve access.



- Offers a **placement consultant** service that helps trainees find and maintain placements, navigate enrolment, and access mentoring.
- Provides **ongoing support** to ensure students remain connected during training.



- Operates a **local study hub** in St Helens for online learners.
- Provides **facilities, internet access, and study support** for trainees completing TAFE or university qualifications remotely.



- Connects residents with **training, placement, and job opportunities** in the early years workforce.
- Acts as a **local employment hub**, linking job seekers with providers.



- Provides **advocacy, peer mentoring, and networking support**.
- Helps create stronger professional communities and **sector collaboration** across the East Coast.

Sources:

- Consultations

10.6 East Coast ECEC & OSHC Workforce Recommendations

Locally targeted strategies are key to sustaining the East Coast early years workforce

NMC Early Years Workforce Profiles

NMC has undertaken extensive research into the early years workforce, engaging over **200+ survey respondents**, **50+ service providers** and stakeholders across **seven LGAs**. From this work, NMC developed **three key workforce profiles** to guide targeted recruitment and retention strategies in the ECEC and OSHC sectors.



Early Career (16–30 years)

- Trainees and young adults without dependents seeking full-time work and career development.
- Attracted by training pathways, supportive environments, and regular hours.
- Leave due to workload, low pay, and unmet role expectations.

Note: 16–18 year olds only if trainees.



Mid-Career (35–46 years)

- Return-to-work parents seeking part-time, local roles.
- Value flexibility, community contribution, and alignment with school hours.
- Leave due to high workload, low pay, and poor workplace culture.



Latter Career (46+ years)

- Experienced, often part-time educators nearing retirement.
- Value flexibility, local work, and community impact.
- Leave due to physical demands, workload pressures, and retirement.

Workforce Strategies

These strategies are designed to effectively support the three NMC early years workforce profiles by addressing their unique recruitment, career development, and retention needs within local communities.

Focus on Local Recruitment	Prioritise hiring within the township to reduce travel-related attrition.
Workforce Pipelines	Expand school traineeships and subsidised Certificate III programs with a focus on local coordination and delivery.
Life Stage Roles	Offer flexible rostering and lighter or mentoring roles for parents and older educators.
Induction & Mentoring	Provide structured onboarding, realistic job previews, and peer support.
Flexible Service Models	Use multi-age "Family Grouping" to ease staffing pressures in small teams.
Retention Barriers	Partner on affordable housing and recognise long service and community contribution.

10.7 Future Workforce Requirements

St Helens and Triabunna need more educators by 2029, Bicheno has a surplus, and Swansea's staffing meets projected demand

Future Workforce Requirements (2029)

NMC conducted an analysis to determine the staffing needed to meet projected future enrolments. The majority East Coast local ECEC/OSHC centres have high demand and include St Helens, Bicheno, Triabunna, Swansea and St Marys.

Location	Current Licensed Places (2025)	Optimal Licensed Places (2029)	Additional Licensed Places (2029)	Current Number of Educators (2025)	Optimal Number of Educators (2029)	Additional Educators to Meet Demand (2029)
St Helens	66	106	+40	16	26	+10
Bicheno	32	49	+17	12	14	+2
Triabunna	40	38	+18	7	10	+3
Swansea	28	46	+18	9	12	+3
St Marys*	10	29	+19	7	10	+3

Refer to Appendix C for full future workforce requirements methodology

Please see Part A of this document for detailed St Marys forecasting

- **St Helens:** Current staffing of 16 educators is insufficient for projected demand, which requires 26 full-time educators by 2029. A gap of 10 educators reflects ongoing capacity pressures and underscores the need for workforce expansion to meet safe staffing ratios.
- **Bicheno:** With 12 current educators and a projected need for 14, a small gap of 2 educators exists. While demand is more manageable than St Helens, minor increases in staffing are needed to fully meet future enrolments.
- **Triabunna:** Current staffing of 7 educators aligns with the projected need of 10, indicating a medium workforce gap. The service is requires further resources for both current and future enrolments.
- **Swansea:** 9 Current educators are insufficient for the projected 12 required by 2029, leaving a gap of 3 educators. Combined with high enrolment pressures, this highlights an urgent need for workforce growth.
- **St Marys:** Current staffing of 10 educators is below projected demand, which requires 13 full-time educators by 2029. A shortfall of 3 educators reflects the persistent gap of 16–29 licensed places and highlights the need for workforce expansion to meet safe staffing ratios

St Helens, St Marys and Swansea face the most urgent workforce pressures, each requiring 3–10 additional educators by 2029. Bicheno and Triabunna show smaller gaps of 2–3 staff, but still need targeted growth to ensure safe ratios and maintain service stability across the coast.

Assumptions:

- Tasmania educator-to-child ratios applied are:
 - 0-24 months — 1 educator : 4 children
 - 24-36 months — 1 educator : 5 children
 - 36+ months — 1 educator : 10 children
- Children optimally require at least 4 days of care
- Average educator to child ratio is 1:7

10.8 East Coast ECEC & OSHC Workforce Summary

The East Coast ECEC & OSHC workforce is small, highly localised, and under pressure from low pay, high attrition, and poor training completion rates, despite being upheld by dedicated educators

Section Summary



The workforce analysis shows that the current ECEC & OSHC workforce **does not have sufficient capacity or qualification depth to meet future demand.**

Small teams, limited Bachelor-qualified staff, and high attrition constrain service viability, despite strong commitment from local educators.

By 2029, **St Helens, St Marys and Swansea carry the greatest workforce strain**, with demand for 3–10 extra educators by 2029. Bicheno and Triabunna have smaller shortfalls of 2–3 staff but still require careful investment to uphold safe staffing ratios and sustain stable service delivery.

Small, fragile teams

Most centres operate with 5–7 educators, creating vulnerability to staff absences and limiting capacity to expand.

Limited Bachelor-qualified staff

The region relies heavily on Certificate III and Diploma staff, with only two Bachelor-qualified teachers across all sites.

Recruitment and retention challenges

Low pay, high workload, and housing and transport barriers drive attrition and make it hard to build a stable workforce.

Reliance on local and commuting staff

While 76% of staff travel under 20 minutes, towns like Bicheno depend on long-distance commuters, exposing services to disruption.

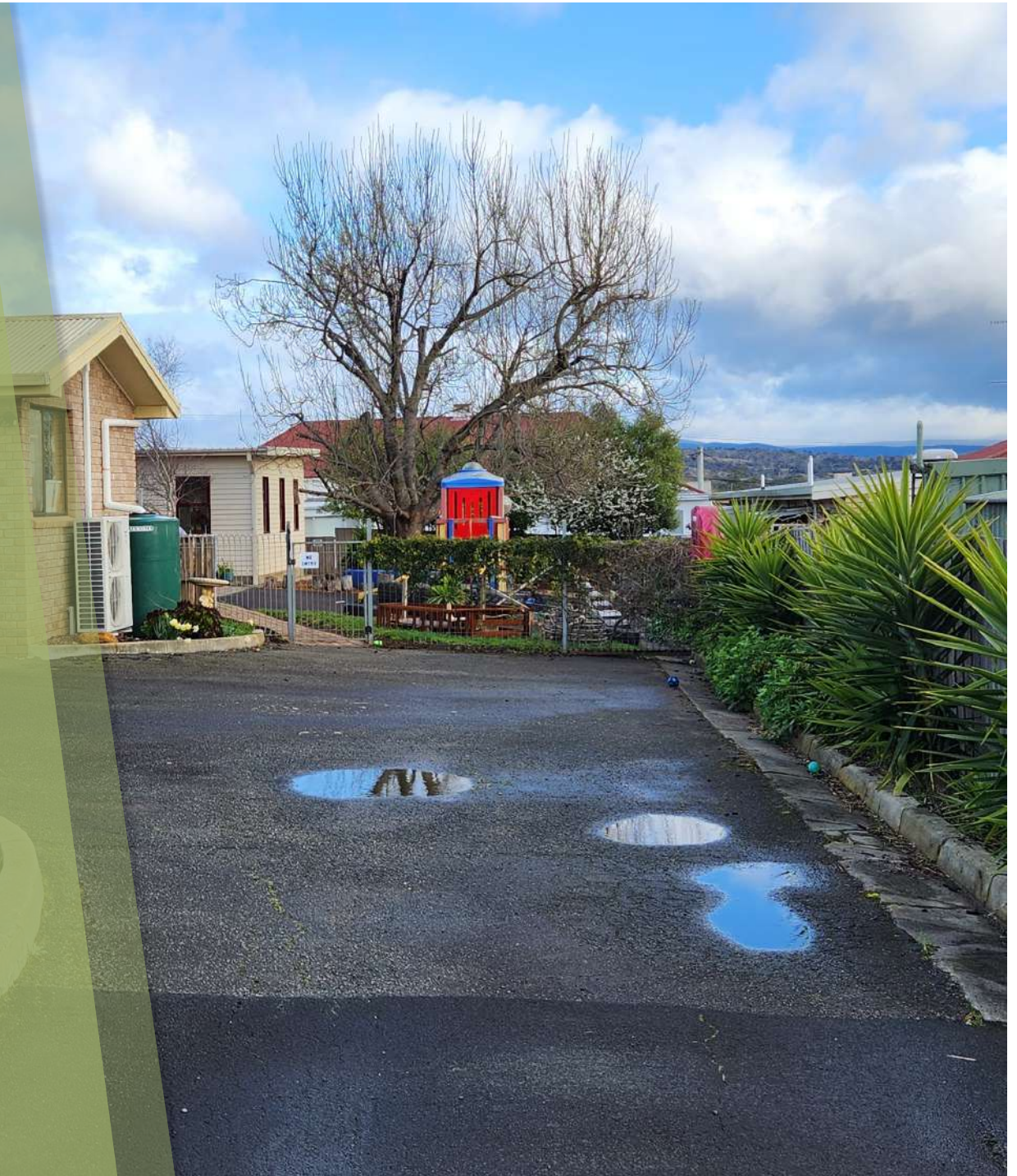
Training pathways exist but completions are low

Providers such as Lady Gowrie, TasTAFE, and CUC offer traineeships and mentoring, but qualification completion rates remain very low.

Future workforce gaps are significant

By 2029, St Helens will need +10 educators, St Marys +3, Triabunna +3 and Swansea +3, underscoring urgent growth needs in key hubs.

PART B: EAST
COAST
REGIONAL
SERVICE MODEL
& SITE
IDENTIFICATION



11.1 East Coast Regional Service Model & Site Identification Methodology

An overview of the upcoming sections within the service model/site identification of East Coast ECEC & OSHC

Service Model & Site Identification Methodology

Where should new or expanded services be located to meet demand to 2029?

By testing different site models and applying a structured assessment framework across high-demand towns, this section identifies priority locations and the most viable service delivery models for the East Coast.

1

Site Model Options

- Assessment of school co-location, Child & Family Learning Centres, and greenfield builds.
- Consideration of advantages, challenges, and long-term sustainability of each approach.

2

Top Areas of Demand

- Analysis of future demand to 2029 in St Helens, Swansea, Bicheno, Triabunna, and St Marys.
- Identification of where service shortfalls are most acute and where investment is most critical.

3

Recommendation Framework

- Sites assessed against criteria: unmet demand, site suitability, economic role, and access to training hubs.
- Prioritisation of townships to guide future infrastructure planning and investment.

11.2 ECEC & OSHC Site Option Categories

Multiple types of site options exist with varying advantages and challenges

Selection of site model should balance capital cost, integration opportunities, workforce access, and long-term sustainability, with co-location options offering stronger immediate service integration, and greenfield allowing the greatest design flexibility.



School Co-Located

- **Advantages:**
 - Direct transition pathway from early learning to school.
 - Potential to share facilities (playgrounds, parking, hall, kitchen).
 - Easier family drop-off/pick-up.
 - Supports before/after-school care delivery (OSHC) without additional transport.
- **Challenges:**
 - Limited space in existing school footprint.
 - Requires heavy coordination and planning for licensing, access, and security.
 - May need separate entry for ECEC to meet National Quality Framework requirements.



Child Family Learning Centre (CFLC)

- **Advantages:**
 - Wrap-around support — health checks, allied health, parenting support on-site.
 - Proven to improve outcomes for vulnerable families.
 - Potential to pool staffing and professional development resources.
- **Challenges:**
 - Some East Coast areas currently lack a CFLC — would require a new build or expansion of an ECEC hub to incorporate CFLC functions.
 - Higher capital cost for integrated facility.
 - Requires multi-agency governance model.



Greenfield

- **Advantages:**
 - Maximum design flexibility — can plan for capacity, OSHC rooms, outdoor space, parking.
 - Choice of location to optimise access for multiple catchment towns.
 - Potential to future-proof for population growth or co-locate with other services later.
- **Challenges:**
 - Highest upfront land and construction cost.
 - No existing shared facilities — all infrastructure (utilities, parking, landscaping) must be built.
 - Risk of reduced foot traffic if not near existing community hubs.

11.3 Top Area of ECEC & OSHC Demand: St Marys – Part A Recommendation

Expansion is needed to meet future demand at the East Coast's smallest centre

St Marys is projected to face one of the most persistent service shortfalls on the East Coast, requiring 19 additional licensed places, 2 new rooms, and 3 extra educators by 2029.

This unmet demand highlights the need for investment in local infrastructure—whether through expansion of existing facilities or a new purpose-built service—supported by a coordinated workforce recruitment and training approach.

As a regional hub drawing families from St Marys, Scamander, Fingal and surrounding rural areas, strengthening service capacity in St Marys is critical to ensuring equitable access, reducing travel barriers, and supporting community growth.



10 Current
Places



29 Future
Places



19 Increase

The number of licensed places needed in 2029 to offer services to children 4 days a week.



7 Current
Educators



10 Future
Educators



3 Increase

The number of educators required to match the increase in licensed places by 2029. Based on an averaged 1:7 educator-to-child ratio (from 1:4, 1:5, and 1:10).



+2 Rooms



61.75m² Indoor



133m² Outdoor

The number of additional rooms required to meet the increased number of licensed places in 2029. This is based on an average room accommodating 12 children, although this varies based on age group and room design.



School Co-Located

Located within or beside a school for smooth transition to primary, shared facilities, and easier drop-off. Enables OSHC without transport but needs careful planning for licensing, access, and space.

NMC Recommendation



Greenfield

Co-located with family, health, and wellbeing services for wrap-around support and shared resources. Requires significant investment and multi-agency coordination if no existing hub.



Child Family Learning Centre (CFLC)

Purpose-built facility designed for capacity, OSHC, outdoor play, and parking, located for optimal catchment access. Highest cost due to no existing infrastructure.

Sources:

- Consultations
- National Quality Framework
- Thrive Group Workforce Data

- Lady Gowrie Tasmania Workforce Data
- Fingal Valley Neighbourhood House Workforce Data

11.4 Top Area of ECEC & OSHC Demand: St Helens – Recommended

Highest Growth in ECEC & OSHC Demand Across the East Coast

St Helens is projected to face the most significant expansion in early childhood education and care (ECEC) and outside school hours care (OSHC) demand by 2029, driven by population growth and service uptake trends.

The scale of growth underlines the need for strategic investment in infrastructure—whether through school co-location, integration with family service hubs, or purpose-built facilities—and a strong workforce pipeline to sustain delivery. These findings align with the project brief's emphasis on targeted infrastructure planning and workforce strategies to enable equitable access.



66 Current
Places



106 Future
Places



40 Increase

The number of licensed places needed in 2029 to offer services to children 4 days a week.



16 Current
Educators



26 Future
Educators



10 Increase

The number of educators required to match the increase in licensed places by 2029. This is based on the average educator to child ratio of 1:7.



+4 Rooms



130m² Indoor



280m² Outdoor

The number of additional rooms required to meet the increase number of licensed places in 2029. This is based on an average room accommodating 12 children, although this varies based on age group and room design.



School Co-Located

Located within or beside a school for smooth transition to primary, shared facilities, and easier drop-off. Enables OSHC without transport but needs careful planning for licensing, access, and space.

NMC Recommendation



Greenfield

Co-located with family, health, and wellbeing services for wrap-around support and shared resources. Requires significant investment and multi-agency coordination if no existing hub.



Child Family Learning Centre (CFLC)

Purpose-built facility designed for capacity, OSHC, outdoor play, and parking, located for optimal catchment access. Highest cost due to no existing infrastructure.

Sources:

- Consultations
- National Quality Framework
- Thrive Group Workforce Data

- Lady Gowrie Tasmania Workforce Data
- Fingal Valley Neighbourhood House Workforce Data

11.5 Top Area of ECEC & OSHC Demand: Bicheno – Recommended

Steady growth requiring scalable, flexible service models

By 2029, Bicheno will require 14 more educators, four rooms, and 49 licensed places to meet optimal service levels. **While growth is moderate compared to St Helens**, the challenge lies in scaling services proportionately to ensure viability in a smaller market.

Co-location with schools or community hubs could help maximise resource efficiency, with an emphasis on adaptable design to meet fluctuating enrolment needs. This scenario reinforces the brief's focus on place-based solutions that support both sustainability and responsiveness in smaller population centres.



32 Current
Places



49 Future
Places



17 Increase

The number of licensed places needed in 2029 to offer services to children 4 days a week.



12 Current
Educators



14 Future
Educators



2 Increase

The number of educators required to match the increase in licensed places by 2029. Based on an averaged 1:7 educator-to-child ratio (from 1:4, 1:5, and 1:10).



+2 Rooms



55.25m² Indoor



119m² Outdoor

The number of additional rooms required to meet the increase number of licensed places in 2029. This is based on an average room accommodating 12 children, although this varies based on age group and room design.



School Co-Located

Located within or beside a school for smooth transition to primary, shared facilities, and easier drop-off. Enables OSHC without transport but needs careful planning for licensing, access, and space.

NMC Recommendation



Greenfield

Co-located with family, health, and wellbeing services for wrap-around support and shared resources. Requires significant investment and multi-agency coordination if no existing hub.



Child Family Learning Centre (CFLC)

Purpose-built facility designed for capacity, OSHC, outdoor play, and parking, located for optimal catchment access. Highest cost due to no existing infrastructure.

Sources:

- Consultations
- National Quality Framework
- Thrive Group Workforce Data

- Lady Gowrie Tasmania Workforce Data
- Fingal Valley Neighbourhood House Workforce Data

11.6 Top Area of ECEC & OSHC Demand: Triabunna – Not Recommended

Stable demand with opportunity for service optimisation

Triabunna faces a projected shortfall of 18 places by 2029, signalling strong local demand and pressure on existing services.

While this demand exceeds that of Bicheno, Triabunna has not been prioritised for expansion, as the Bicheno service supports a wider regional catchment, including Coles Bay, where no alternative service options exist.



20 Current
Places



38 Future
Places



18 Increase

The number of licensed places needed in 2029 to offer services to children 4 days a week.



7 Current
Educators



10 Future
Educators



3 Increase

The number of educators required to match the increase in licensed places by 2029. Based on an averaged 1:7 educator-to-child ratio (from 1:4, 1:5, and 1:10).



+2 Rooms



58.5m² Indoor



126m² Outdoor

The number of additional rooms required to meet the increase number of licensed places in 2029. This is based on an average room accommodating 12 children, although this varies based on age group and room design.



School Co-Located

Located within or beside a school for smooth transition to primary, shared facilities, and easier drop-off. Enables OSHC without transport but needs careful planning for licensing, access, and space.



Greenfield

Co-located with family, health, and wellbeing services for wrap-around support and shared resources. Requires significant investment and multi-agency coordination if no existing hub.



Child Family Learning Centre (CFLC)

Purpose-built facility designed for capacity, OSHC, outdoor play, and parking, located for optimal catchment access. Highest cost due to no existing infrastructure.

11.7 Top Area of ECEC & OSHC Demand: Swansea – Recommended

Significant expansion needed to meet future childcare demand

Swansea is projected to require one of the largest infrastructure and workforce increases on the East Coast, with 3 additional educators, 2 new rooms, and 18 more licensed places by 2029.

This surge in demand signals a need for bold infrastructure investment—likely through purpose-built facilities or major expansions of existing services—supported by a coordinated recruitment and training strategy.

The scale mirrors the brief's emphasis on forward planning to address both the physical and human resource capacity required for sustainable, accessible services in high-growth areas.



28 Current
Places



46 Future
Places



18 Increase

The number of licensed places needed in 2029 to offer services to children 4 days a week.



9 Current
Educators



12 Future
Educators



3 Increase

The number of educators required to match the increase in licensed places by 2029. Based on an averaged 1:7 educator-to-child ratio (from 1:4, 1:5, and 1:10).



+2 Rooms



58.5m² Indoor



126m² Outdoor

The number of additional rooms required to meet the increased number of licensed places in 2029. This is based on an average room accommodating 12 children, although this varies based on age group and room design.



School Co-Located

Located within or beside a school for smooth transition to primary, shared facilities, and easier drop-off. Enables OSHC without transport but needs careful planning for licensing, access, and space.

NMC Recommendation



Greenfield

Co-located with family, health, and wellbeing services for wrap-around support and shared resources. Requires significant investment and multi-agency coordination if no existing hub.



Child Family Learning Centre (CFLC)

Purpose-built facility designed for capacity, OSHC, outdoor play, and parking, located for optimal catchment access. Highest cost due to no existing infrastructure.

11.8 Site & Service Model Recommendations

Three sites & service models have been prioritised based on demand, site, employment, and training

Recommendations



Please see Part A for the St Marys new build recommendation, driven by limited infrastructure and significant unmet demand.

Priority 1	St Helens St Helens is the region's anchor service and employment hub.	School Co-Located (Via New Build) Early Learning Centre already opposite the District High School and a CFLC nearby, providing strong integration opportunities. 	40+ Places By 2029 The largest shortfall in the region, with enrolments already at capacity and families reporting difficulty accessing care.
Priority 2	Swansea Swansea is a smaller but stable community with limited local services.	School Co-Located (Via New Build) Swansea Education and Care Service is ~500 m from the school; closer integration would require a new facility on or adjacent to the school site. 	18+ Places By 2029 Services are already stretched, and population growth will intensify pressure on limited local options.
Priority 3	Bicheno Bicheno is a tourism-driven economy with seasonal service pressures.	School Co-Located (Via Expansion) The Little Penguins centre already sits next to the Primary School, offering a natural co-location pathway. 	17+ Places By 2029 While numbers are smaller, demand regularly exceeds supply during peak tourism seasons, leaving local families with limited options.

Please note: Triabunna was not prioritised, as Bicheno was elevated due to its broader catchment (including Coles Bay), persistent shortfalls, and lack of nearby alternatives—making expansion more critical for regional access and family stability.

11.9 Site & Service Model Recommendation Assessment

Assessment of St Helens, Bicheno, and Swansea, confirming school co-location as the preferred model

Assessment

The assessment applies this framework to St Helens, Bicheno, and Swansea, comparing demand, site options, economic role, and training access. It highlights relative strengths and sets out school co-location as the preferred model in each township.

 Impact of Criterion	Criterion ¹	Priority 1: St Helens	Priority 2: Swansea	Priority 3: Bicheno
	Unmet Demand (2029)	High – Largest demand gap (+40 places; ~+10 educators by 2029).	Moderate–High – Gap of ~+18 places; ~+3 educators required.	Moderate – Gap of ~+17 places; ~+2 educators required.
	Site Suitability & Land Use	High – Early Learning Centre already opposite the high school; CFLC nearby; expansion most feasible.	Medium – Lady Gowrie ~500 m from the school; co-location would require new build adjacent to school.	High – Primary school and Little Penguins childcare located on the same land; natural co-location.
	Employment Hubs & Economic Role	High – Largest township; strong regional service and employment hub.	Moderate – Small township; limited service role but stable growth.	Moderate – Smaller permanent base; tourism economy; seasonal demand pressures.
	Access to Training Hubs	Medium – ~2 hrs to Launceston; moderate accessibility to training and placements.	Low–Medium – ~2 hrs to Hobart; still distant but somewhat better access.	Low – ~2.5 hrs to Hobart; weaker link to training pathways.
	Recommended Delivery Model	School co-located via new build (build on existing ELC and CFLC site).	School co-located via new build adjacent to school (not possible to rely on existing Lady Gowrie site 500 m away).	School co-located via partnership/expansion with Little Penguins.

11.10 Priority 1: St Helens New Build Financial Evaluation

Financial Assessment of Priority 1: A new centre build, co-located with St Helens District High School



Priority 1: St Helens Financial Summary

Priority 1 involves a total project cost of **\$2.59 million (ex. GST)** to deliver a new co-located ECEC & OSHC facility at St Helens District High School. The **1,010 sqm build** will address a persistent shortfall of 40+ places, positioning St Helens as the East Coast hub for early learning and care. The model maximises use of public land, clusters services alongside the CFLC and school, and provides a sustainable, community-anchored solution to meet long-term regional demand.

Community & Strategic Alignment:

Co-locating with the school and CFLC cements St Helens as the East Coast hub, reducing travel for families from surrounding towns.

This addresses a persistent 40+ place shortfall by embedding early years infrastructure where demand is highest.

This priority supports Break O'Day Council's Liveability and Youth goals by clustering education, care, and health services on one campus.

Infrastructure co-location maximises public land and assets, lowering build costs and unlocking joint funding opportunities.

Inclusions

- Fit-out costs for kitchens, bathrooms, reception, lockers
- Project management
- Engineering and design
- Architect site supervision
- Basic Landscaping and fencing

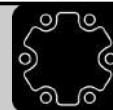
Exclusions

- FFE
- Taswater
- Tasnetworks
- Council fees and charges
- Land purchase
- Gst
- Finance, holding charges and costs
- Removal and disposal of asbestos
- Excavation in rock

Priority 1: St Helens New Build		Value (\$) EXC GST
Building Size		1010sqm
CONSTRUCTION COST	RATE	COST
Fully enclosed covered area: 130 sqm	\$3600/sqm	\$468,000
Unenclosed covered area: 280 sqm	\$3600/sqm	\$1,008,000
Total Floor area: 410sqm	\$3600/sqm	\$1,504,800
Site Works & services: 600sqm	\$650/sqm	\$390,000
SUBTOTAL	Subtotal	\$1,894,800
CONTINGENCY & PROFESSIONAL FEES		
Design Contingency - Allowance 10%	\$189,480	
Construction Contingency - Allowance 5%	\$94,740	
Local condition allowance	\$180,000	
Market Conditions Loading		excl.
Design & Professional Fees 12%	\$227,376	
Statutory Authority Fees & Other Project Cost		excl.
Headworks Charges Allowance		excl.
	Subtotal	\$691,596
TOTAL PROJECT COST (Excluding GST):		\$2,586,396

Please note the above figures do not constitute a budget or quote. It is a high-level cost opinion generated **July 2025** utilising recent market data + information supplied by Ninety Mile Consulting

Estimates provided by Cykel
Architecture



11.11 Priority 2: Swansea Financial Evaluation

Financial Assessment of Priority 2: A new centre build, co-located with Swansea Primary School



Priority 2: Swansea Financial Summary

Priority 2 involves a total project cost of **\$1.52 million (ex. GST)** to deliver a new co-located ECEC & OSHC facility at Swansea Primary School. The **784.5 sqm build** will address a persistent shortfall of 15–18 places, ensuring families retain local access to services in a town with no alternatives. The model strengthens continuity from early years to primary school, maximises use of school land, and enables shared grants and partnerships to support sustainable service delivery.

Community & Strategic Alignment:

Co-locating with Swansea Primary expands local access in a town where families rely on a single service and face a 15–18 place shortfall.

This strengthens continuity of learning by linking early years to primary, reducing drop-off barriers and supporting family routines.

This priority advances Break O'Day and Glamorgan–Spring Bay Councils' Liveability and Youth priorities by keeping services in the heart of the community.

A new build on existing infrastructure makes best use of school land and facilities, lowering build costs and enabling shared grants and partnerships.

Inclusions

- Fit-out costs for kitchens, bathrooms, reception, lockers
- Project management
- Engineering and design
- Architect site supervision
- Basic Landscaping and fencing

Exclusions

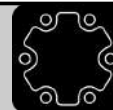
- FFE
- Taswater
- Tasnetworks
- Council fees and charges
- Land purchase
- Gst
- Finance, holding charges and costs
- Removal and disposal of asbestos
- Excavation in rock

St Marys & East Coast Tasmania ECEC & OSHC Needs Analysis

Priority 2: Swansea		Value (\$) EXC GST
Building Size		784.5sqm
CONSTRUCTION COST	RATE	COST
Fully enclosed covered area: 58.5sqm	\$3600/sqm	\$210,600
Unenclosed covered area: 126sqm	\$3600/sqm	\$453,600
Total Floor area: 184.5sqm	\$3600/sqm	\$664,200
Site Works & services: 600sqm	\$650/sqm	\$390,000
SUBTOTAL	Subtotal	\$1,054,200
CONTINGENCY & PROFESSIONAL FEES		
Design Contingency - Allowance 10%	\$105,420	
Construction Contingency - Allowance 5%	\$52,710	
Local condition allowance	\$180,000	
Market Conditions Loading		excl.
Design & Professional Fees 12%	\$126,504	
Statutory Authority Fees & Other Project Cost		excl.
Headworks Charges Allowance		excl.
	Subtotal	\$464,634
TOTAL PROJECT COST (Excluding GST):		\$1,518,834

Please note the above figures do not constitute a budget or quote. It is a high-level cost opinion generated July 2025 utilising recent market data + information supplied by Ninety Mile Consulting

Estimates provided by Cykel
Architecture



11.12 Priority 3: Bicheno Financial Evaluation

Financial Assessment of Priority 3: Little Penguins Centre expansion, co-located with Bicheno Primary School



Priority 3: Bicheno Financial Summary

Option 3 involves a total project cost of **\$1.47 million (ex. GST)** to expand the co-located Little Penguins Centre at Bicheno Primary School. The **774.25 sqm expansion** will respond to steady demand and a 17-place shortfall, with added reach into Coles Bay where no childcare options exist. The model strengthens Bicheno's role as a mid-coast hub, leverages existing infrastructure, and provides a cost-effective, scalable solution aligned with council priorities for community growth.

Community & Strategic Alignment:

Expanding the co-located service at Bicheno Primary responds to steady demand and a 17-place shortfall, with added reach into Coles Bay where no alternatives exist.

This supports continuity for families by linking early years to schooling on one campus, reducing travel and improving daily routines.

This priority aligns with Glamorgan–Spring Bay Council's Liveability and Youth goals by strengthening a key mid-coast hub.

An expansion maximises existing infrastructure through shared land and facilities, opening opportunities for joint funding and efficient growth.

Inclusions

- Fit-out costs for kitchens, bathrooms, reception, lockers
- Project management
- Engineering and design
- Architect site supervision
- Basic Landscaping and fencing

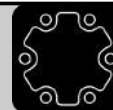
Exclusions

- FFE
- Taswater
- Tasnetworks
- Council fees and charges
- Land purchase
- Gst
- Finance, holding charges and costs
- Removal and disposal of asbestos
- Excavation in rock

Priority 3: Bicheno		Value (\$) EXC GST
Building Size		774.25sqm
CONSTRUCTION COST	RATE	COST
Fully enclosed covered area: 55.25 sqm	\$3600/sqm	\$198,900
Unenclosed covered area: 119 sqm	\$3600/sqm	\$428,400
Total Floor area: 174.25sqm	\$3600/sqm	\$627,300
Site Works & services: 600sqm	\$650/sqm	\$390,000
SUBTOTAL	Subtotal	\$1,017,300
CONTINGENCY & PROFESSIONAL FEES		
Design Contingency - Allowance 10%	\$101,730	
Construction Contingency - Allowance 5%	\$50,865	
Local condition allowance	\$180,000	
Market Conditions Loading		excl.
Design & Professional Fees 12%	\$122,076	
Statutory Authority Fees & Other Project Cost		excl.
Headworks Charges Allowance		excl.
	Subtotal	\$454,571
TOTAL PROJECT COST (Excluding GST):		\$1,471,871

Please note the above figures do not constitute a budget or quote. It is a high-level cost opinion generated **July 2025** utilising recent market data + information supplied by Ninety Mile Consulting

Estimates provided by Cykel
Architecture



11.13 East Coast Regional Service Model & Site Identification Summary

St Helens, Swansea, Bicheno, and St Marys are prioritised for school-co-located expansion by 2029, while Triabunna is not elevated due to Bicheno's broader catchment and regional role

Section Summary



The site identification process confirms that **St Helens, Swansea, Bicheno, and St Marys should be prioritised for expansion through school co-located models**, reflecting the balance of 2029 demand, feasibility, and community access.

Triabunna, while showing demand growth, was not elevated above Bicheno due to its smaller catchment and the broader regional role played by Bicheno and Coles Bay. Together, these four towns provide a clear roadmap for targeted infrastructure investment and sustainable service delivery on the East Coast.

School co-location is the preferred model

Offers continuity between early learning and schools, supports OSHC delivery, and maximises use of existing infrastructure.

St Marys is High Priority (See Part A)

Recommendation included in Part A due to its unique infrastructure constraints and significant unmet demand.

St Helens is high priority

Requires ~+40 additional places and ~+10 educators by 2029; as the largest hub, it anchors regional access and employment.

Swansea is medium priority

Needs ~+18 places and +3 educators; a new school-adjacent build is recommended to address limited existing options.

Bicheno is medium priority

Requires ~+17 places and +2 educators; existing co-location with Little Penguins and the Primary School provides a natural pathway.

Triabunna is lowest priority

Despite a shortfall of +18 places, it was prioritised below Bicheno, which serves a broader catchment including Coles Bay with no alternatives.

APPENDICES



Appendix A: Financial Evaluation Matrix

Financial Impact Evaluation incorporates five key components to define and generate the criteria used to rate the potential financial performance of each option

EVALUATION CRITERIA FOR FINANCIAL IMPACT

Component	Description	Very Low	Low	Medium	High	Very High
Capital Cost (CapEx)	The upfront cost to develop the site, including construction, site works, and fit-out.	\$0—\$1m	\$1m—\$2m	\$2m—\$3m	\$3m—\$4m	>4m
Operating Cost (OpEx)	The ongoing cost of running the service, including staffing, utilities, maintenance, and administration.	<\$200k	\$200k-\$400k	\$400k-\$600k	\$600k-\$800k	>\$800k
Revenue & Funding Sources	The availability, diversity, and stability of income and funding to support the site.	Single funding source, unstable or short-term	Limited funding diversity; moderate stability	Multiple funding sources; stable with some risk	Diverse and stable funding mix; low risk	Highly diverse, long-term secured funding sources
Whole-of-Life Cost	The total cost of ownership over the facility's lifecycle, including depreciation, maintenance, and capital renewal.	<\$500k	\$500k-\$700k	\$700k-\$900k	\$900-\$1.1m	>\$1.1m
Opportunity Cost / Value-for-Money	The balance of investment versus long-term benefit; efficiency of resource use compared to other options.	Low strategic alignment; poor value	Moderate alignment; low efficiency	Good alignment; fair value	Alignment; good systemic value	Exceptional alignment; maximises benefits and systemic efficiency

Appendix B: Consultation Summary findings

There is growing momentum on Tasmania's East Coast to expand ECEC & OSHC through flexible delivery, co-located hubs, and local workforce development to meet changing community needs

Challenges		Opportunities
 Service Availability & Access	Many towns (Coles Bay, Scamander) lack permanent ECEC or OSHC	Strong appetite for mobile, pop-up, and seasonal models (e.g. <i>Building Blocks</i> in Fingal)
	No infant care in several centres; limited hours and places across the region	CFLC in St Helens and Neighbourhood Houses offer entry points for integrated or expanded services
	Families often travel long distances for care or go without	Potential for co-locating services with schools, halls or community facilities
 Workforce Capacity & Development	Workforce shortages across the region; Cert III completions in SE Coast were zero in 2023	Skills Tasmania planning mid-2025 incentives: bonuses, mentoring, relocation support
	Poor retention: educators leave after 2–3 years; limited local training	Local pipelines: return-to-work parents, migrant communities (Bicheno), and school leavers
	Transport and housing barriers make recruitment difficult in remote towns	Strong stakeholder support for regional training and hosted placements (e.g. within service hubs)
 Infrastructure & Facilities	Existing facilities (e.g. Neighbourhood Houses, halls) not fit for licensed care without upgrades	Community infrastructure (e.g. Fingal Play Centre - FVNH, Coles Bay Hall) identified as adaptable shared-use sites
	Limited available land or zoning constraints in some towns	Stakeholders keen on co-investment and multi-use builds (e.g. health, education under one roof)
 Community Demographics & Demand Trends	St Helens is becoming a hyper-ageing community; declining young family cohorts	Scamander is a growing family-oriented area; viewed as a priority for long-term service planning
	Seasonal population increases (e.g. Easter/summer in Bicheno, Coles Bay) stretch service capacity	Seasonal and pop-up childcare models could meet peak demand and support hospitality workforce
 Governance & Service Model	Some communities unsure how early learning, OSHC, and kindergarten are defined or coordinated	Strong regional appetite for integrated models and shared governance (e.g. CFLC-style hubs)
	Variability in service models and funding access across towns	Positive sentiment toward cross-provider partnerships and trial-based innovation

Appendix C: Future Supply & Demand Methodology

Methodology used to estimate 2029 staffing requirements for the St Marys, St Helens, Bichino, Triabunna and Swansea Centres based on population projections and workforce data

This methodology was used to project future childcare demand across the East Coast of Tasmania, based on enrolments, four care days per child, and an average 1:7 educator-to-child ratio (drawn from Tasmanian regulatory ratios). It highlights where extra places and staff will be needed to meet community demand.

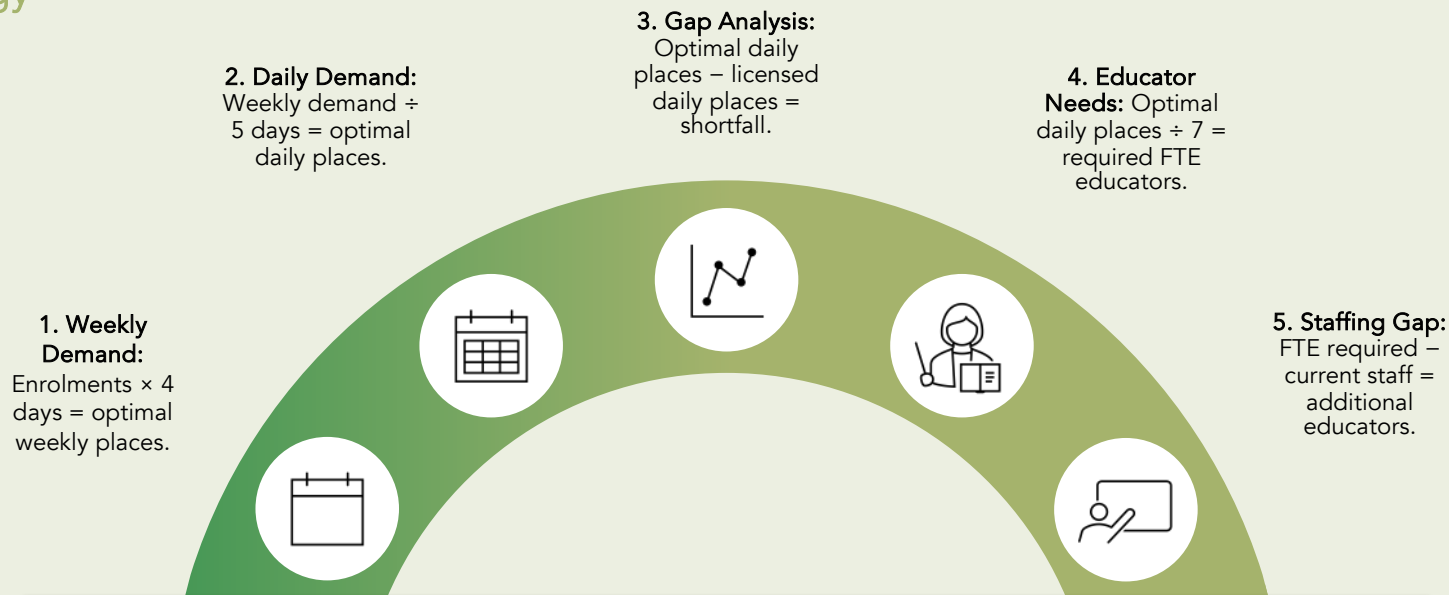
Inputs & Predictions

- **Inputs (Known):**
 - Current enrolments, licensed daily places, licensed weekly places.
- **Projections (Predicted):**
 - Estimated enrolments (2025–2029), optimal places needed, educator shortfall.

Assumptions

- Children require a **minimum of 4 care days per week**.
- Average **educator-to-child ratio = 1:7**.
- Derived as a weighted average of Tasmanian legal ratios:
 - 1:4 (0–2 yrs)
 - 1:5 (2–3 yrs)
 - 1:10 (3+ yrs)
- Projections assume stable service demand with incremental annual increases.

Methodology



Appendix D: Site & Service Model Option Assessment Criterion Matrix

A framework that defines Low–High ratings across demand, site, employment, and training

Criterion Matrix

The criterion matrix defines how “Low,” “Medium,” and “High” ratings are applied across four factors: unmet demand, site suitability, employment hubs, and access to training. It provides a consistent framework to compare townships and guide recommendations.

 Impact of Criterion	Criterion	Low	Medium	High
	Unmet Demand (2029)	Small projected gap in licensed vs optimal places (< +10 places by 2029); little or no workforce uplift required (0–2 educators).	Moderate projected gap (+10 to +20 places by 2029); workforce uplift required (3–7 educators).	Large projected gap (> +20 places by 2029); significant workforce uplift required (8+ educators); strong evidence of unmet need.
	Employment Hubs & Economic Role	High – Largest township; strong regional service and employment hub.	Moderate – Smaller permanent base; tourism economy; seasonal demand pressures.	Moderate – Small township; limited service role but stable growth.
	Site Suitability & Land Use	No adjacent childcare; school land constrained; expansion only possible through full new build on greenfield land.	Childcare nearby (within ~500 m) or partial capacity for expansion on school land; moderate redesign/build required.	Existing childcare directly adjacent to or within school grounds, or an operational CFLC; strong potential for co-location or direct expansion.
	Access to Training Hubs	Distant (>2.5 hrs) from Launceston or Hobart; limited access to RTOs/universities; weak workforce pipeline.	Within ~2–2.5 hrs of Launceston or Hobart; moderate access; some challenges for attracting/retaining trainees.	Within ~1.5 hrs of Launceston or Hobart; strong connectivity to training providers; feasible for placements and staff development.

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