



Royal Greenwich Childcare Sufficiency Assessment Annual Update Autumn 2020

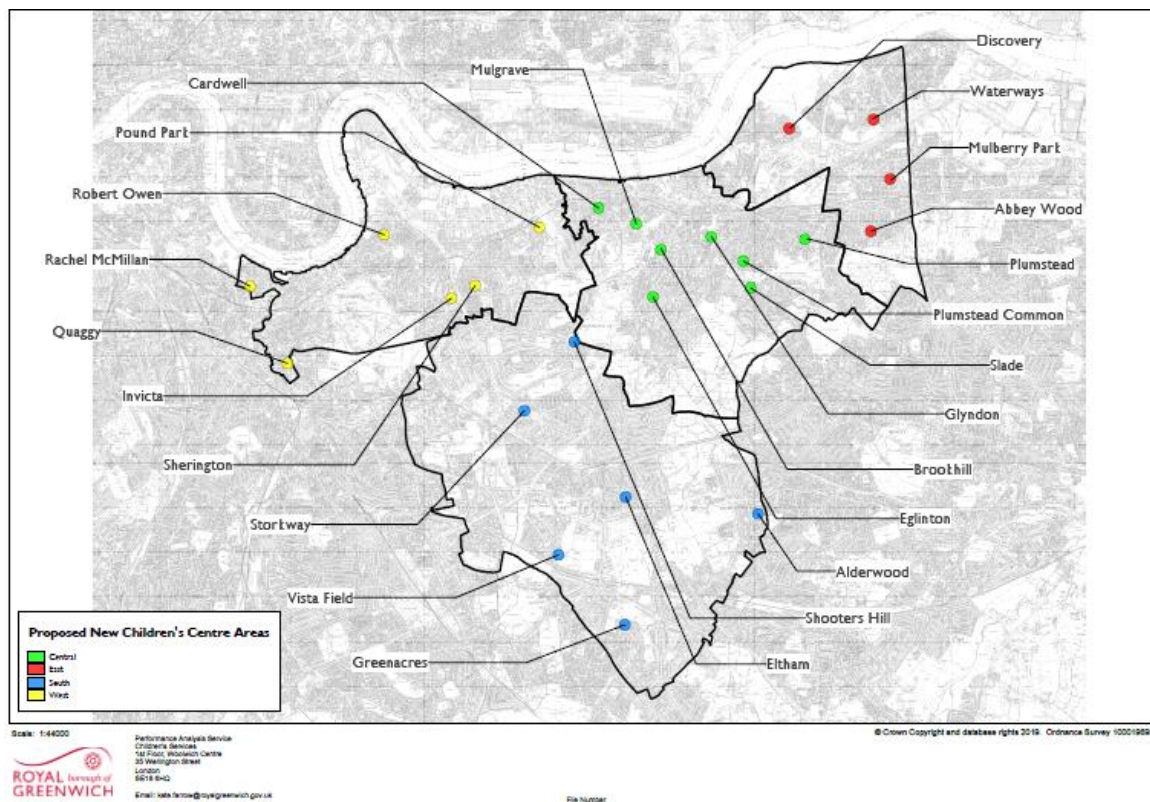


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Children's Centres Areas

We use our Children's Centres areas when assessing sufficiency of childcare provision

Figure 1: Royal Greenwich Children's Centres Areas



1. Overall assessment and summary

As stated in our 2019-21 Childcare Strategy and Sufficiency Assessment we want all children in Greenwich, whatever their background or circumstances to have the best possible start in life. Having sufficient, high quality childcare that meets the needs of our residents plays a key part in helping to achieve this.

Royal Greenwich continues to have a very strong track record of supporting the development and quality improvement of early education and childcare provision, meeting the needs of families and supporting them to engage in early learning. Giving children the best possible early learning experiences coupled with a comprehensive range of early help support is a high priority.

Our commitment to training and developing the workforce, improving practice and supporting the development of new provision reflects this and continues to be at the heart of the work we do – along with raising the profile of this valuable sector. Our Childcare Strategy and Sufficiency Assessment 2019-2021 (CSSA 2019-21) set out how Greenwich's excellent Early Years Foundation Stage profile outcomes would be sustained as well confirming our plans to continue to support sufficiency and the availability of good quality early learning and childcare.

In this annual update we have assessed sufficiency using data available about the need, demand and availability of provision.

As well as our statutory duties and responsibilities there have been a number of changes that have, and will continue to have impact on the provision, take-up and delivery of early learning and childcare.

Some of the key changes are:

- The introduction of the Early Years National Funding Formula – which positively impacted on the hourly rate payable to early learning providers in Royal Greenwich. Although this was well received many providers, consulted as part of CSSA 2019-21, said it was not reflective of the actual delivery cost.
- The introduction 30 hour funded places – which provides an additional 15 hours for three and four-year-old children of parents who are eligible based on their employment income. As a result of this being introduced many providers, across the sector, changed their business models to accommodate the delivery of the take-up in settings.
- The manifesto of the newly elected government, as presented in the December 2019 general election, does have reference to early learning and childcare, with an additional focus on wraparound and out of school provision. We await details of the expectations on local authorities and of the resources available.

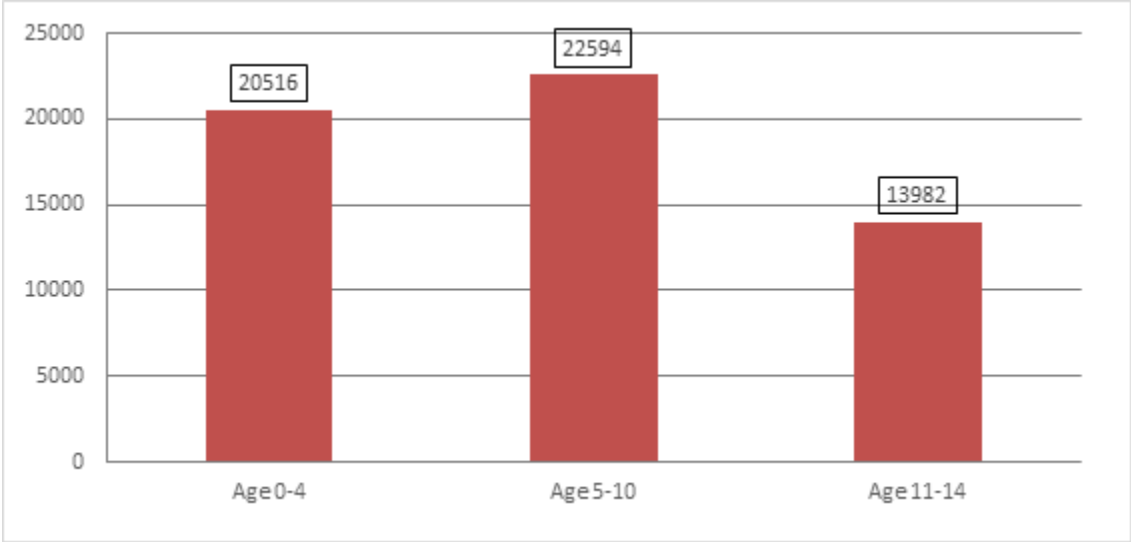
At the time of writing this update document there is sufficient early learning and childcare provision in Royal Greenwich. The market is relatively stable and unlike the national picture the childminding rate in the borough is sustaining with no notable decline in childminders / childminding places.

Covid-19 Pandemic

During this reporting period and at the time of writing (October 2020) the impact of the worldwide pandemic has of course affected the early learning and childcare sector which is noted throughout this update and in a specific section relating to business support and sustainability matters.

2. Demand for childcare

Figure 2: Royal Greenwich population estimates by childcare age groups, 2020



Source: GLA 2018-based BPO mid-year estimates

Children with Special Educational Needs and Disabilities

Children with lower level additional needs

As at 2020

- **6,166 of children within Greenwich schools** receive SEN support; this reflects 13.8% of the school population. The most prevalent need for SEN support pupils is Speech, Language and Communication Difficulties

Children with higher level additional needs

As at 2020

- Approximately 2% (1,726) of the 0-19 resident population in Greenwich have an Education, Health and Care Plan (EHCP)
- **63 children aged 0-4** have an EHCP, 43 of whom have Autistic Spectrum Disorder (ASD) and is the most prevalent primary need in this age group (28) followed by Speech, Language and Communication Needs (SLCN) (19)
- **1,411 school aged children (to Year 13)** have an EHCP. ASD is the most prevalent primary need for children and young people with an EHCP (approximately 47% of children with an EHCP) followed by SLCN (16%)

3. Supply of childcare

Types of childcare available

- There are 661 childcare providers in Greenwich
- Over two thirds (67%) of childcare in the borough is registered as childminders
- The second most common type of provision is the private, voluntary and independent (PVI) sector
- Nursery schools and nurseries within primary schools make up 9% of registered provision
- There is variation in the proportion of provision registered in different areas of the borough: in the East, 83% of registered provision is childminders and 7% by PVIs. In the West, 56% is registered childminders and 26% is PVIs.

Childminders have different registrations

- *The Early Years Register only - caring for children aged 5 and under*
- *The Childcare Register only - caring for children aged 5 to 7*
- *Both registers - caring for children of any age under 8*
- *The voluntary part of the Childcare Register - caring for children aged 8 and above*

Childminders can only care for 6 children under 8 of which only 3 can be under 5.

Early Years providers and places

- 90% of childcare providers (597) in the borough offer early years provision; either funded early learning places, childcare or both.
- They offer a maximum of 10,912 (estimated) early years childcare places. These figures include schools that provide early years or wraparound care and mark a 22% increase in provision since the CSSA 2019-21.
- This increase in provision has enabled the access to extended early learning provision for three and four year olds across the sector.
- There is variation in the proportion of provision registered in different areas of the borough: in the East, 81% of registered provision is childminders and 7% PVI groupcare provision. In the West, 53% of registered provision is childminders and 27% PVI group care provision.

Figure 3: Type of Early Years childcare provision and estimated number of places¹

Type of provision	Number of providers	Number of registered places including estimates ²
Childminder	332	1991
Maintained Nursery	4	454
Out of School	38	1165
PVI	112	4913
School	57	2153
Special School	1	26

¹ Data in this table was correct on: 06/10/2020

² Some childminder places may also be available for older children.

Grand Total	544	10702
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Source: Ofsted March 2020 and Royal Greenwich Local Ofsted Outcome Tracker

For private, voluntary and independent nurseries and childminders, the number of registered places represents the maximum number of children who can be on the premises at any given time. In practice, many providers choose to operate below their number of registered places.

Children may attend childcare full time or part time. Figure 3 above records places for children who are attending full time, or for as many hours as the setting is open. In some cases, two or more children attending part time may use one full time equivalent place. For example, one child may attend in the morning and one child may attend in the afternoon.

Vacancy rates are a snapshot, and often change rapidly. In some cases, providers may have a vacancy which is only available for a specific age group, or for a particular part time arrangement. In general, vacancy rates are higher in the autumn, when children move to school.

Figure 4: Estimated full time equivalent places for 0-4s currently available and needed to 2024

Area	Childminder	Maintained Nursery School	Out of school	Primary schools with nursery	Private, voluntary and independent	Special school	Grand Total	Estimated 0-4 population change by 2024	FTE shift based on pop change	Est. minimum FTE required for 2024
Central	495		163	752	1,476	26	2,912	7.0%	204	3,115
East	445	78	51	416	327		1,317	7.0%	92	1,409
South	688		663	534	1,401		3,286	-5.0%	-164	3,122
West	363	376	288	451	1,709		3,187	8.0%	255	3,442
Grand Total	1,991	454	1,165	2,153	4,913	26	10,702	4.0%	428	11,130

Source: Ofsted August 2019

GLA 2018-based BPO mid-year estimates

This estimated increase of 4% in the next four years is likely to be deliverable based on market trend in Royal Greenwich.

Early years provision: typical hours provided

Childcare is most commonly delivered during the typical working day: between 8am and 6pm on weekdays. Some parents require childcare outside these times in order to fit with their work or other responsibilities.

- The typical **earliest** hours are between **7am and 7.30am**, with some childminders in Central B, East and West areas offering provision from between 6am and 6.30am
- The typical **latest** hours tend to be **6pm and 6.30pm**, with some childminders offering atypical services to 8pm, 9pm and 10pm in the East and South areas.

School age providers and places

- There are 475 providers for school age children during term time
- There are 44 groupcare providers of childcare for school age children during the holidays
- There are 431 childminders who may provide care for school age children.

Tracking supply of childcare for school age children is difficult because not all of this type of provision is **registerable** with Ofsted. It is possible that we have under-counted the provision of breakfast and afterschool clubs and holiday clubs. Parents may also use provision which is not considered 'childcare', for example sports or arts clubs after school or in the holidays.

School age provision: typical hours provided

- There may also be demand for more school-based breakfast/ before and after school provision, longer hours/extended days and wrap-around childcare.
- Schools have identified growing demand as a result of an increase in working families, new housing developments and not knowing what other provision is available
- Schools are responsive to parental need and demand for childcare and more schools are planning to offer 30-hour places to expand provision or are working in partnership with local childcare providers.
- 44% schools and 30% PVIs and childminders who responded to our survey are keen to collaborate and build partnerships to meet parental demand for childcare

4. Funded Early Education

Introduction to funded early education

Some children are entitled to free early learning and childcare, funded by the government. These entitlements are calculated on the basis of 38 weeks per year.

- **All children aged three and four are entitled to 15 hours per week** during term time until they start reception class in school. Children become eligible for the 15 hours the term after they turn three
- Children aged three and four **where both parents** (including foster parents) **are working**, or from lone parent families where that parent is working, are [entitled to 30 hours per week](#) during term time until they start reception class in school
- **Some children aged two** whose families receive qualifying benefits (including low income families in receipt of in-work benefits), or those who meet additional non-economic [criteria](#) are entitled to **15 hours per week** term time.
- Other criteria for two year old eligibility includes children in our care, children with Education and Health Care Plan or in receipt of Disability Living Allowance, and children who left care under a special guardianship order, child arrangements order or adoption order. The criteria now support through Part 4 of the Immigration and Asylum Act 1999; child of a Zambrano carer and meet income criteria and leave to remain in the UK under Article 8 of the European Convention on Human Rights and meet income criteria.
- Children become eligible in the term after they turn two if they meet the eligibility criteria. Nationally, about 40% of two-year olds are entitled to this offer, proportion varies by area.

Parents do not have to use all the hours of their funded entitlement and they may choose to split them between providers. With the agreement of their provider, parents may also spread them across the year – for example, rather than taking 15 hours for 38 weeks a year they could take fewer hours over more weeks within each term as long as they receive 190 or 380 hours per term and no more than 570 or 1140 hours over the year.

Take up of funded early education places

Figure 5: Take up of funded places

	Autumn 2019			
	2 year old places	3 and 4 year old universal	3 and 4 year old extended	All
Funded Take Up				
Maintained Nursery	216	392	111	719
School	42	1,924	315	2,281
Private, voluntary & independent	626	1,688	725	3,039
Childminders	36	73	79	188
Free entitlements	920	4,077	1,230	6,227

- 77% of those who were eligible took up 2 year old funded provision in Autumn 2019

- 91% of 3 year olds and 82% of 4 year olds of those who were eligible took up funded universal provision in Autumn 2019
- 98% of codes issued to parents eligible for the extended 30-hour offer were validated by providers and with 88% of those children taking up a place in Summer 2019
- 45% of early years funded places are taken up in non-maintained settings

Figure 6: Providers delivering funded early education places

Type of Provision	No of providers delivering funded early years places (Spring 2020)
Childminders	78
Nursery classes in schools	54
Maintained nursery schools	4
Private, voluntary and independent nurseries	98
Total	234

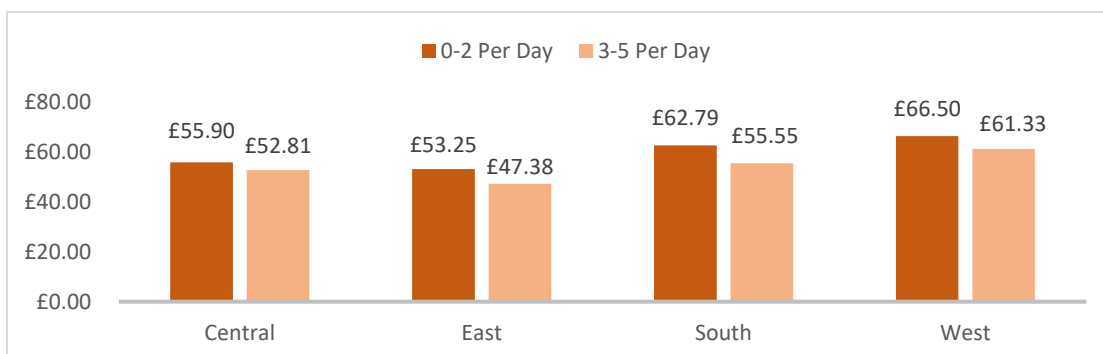
Providers are paid by government via the local authority for delivering funded early education. They are not required to offer them to parents, but of course parents may choose to use a different provider if they do not. Some providers offer a restricted number of funded places.

5. Prices

Prices of early years childcare

- Childcare costs are highest for the youngest age group, under 2s and under 3s as adult to child ratios are higher for these ages (1:3 and 1:4).
- On average, childminding prices are lower than PVI nurseries for 0-2 year olds

Figure 7: Average cost per day for under 5s by area



For early years learning and childcare outside the funded entitlements, we report on average prices per hour and day as reported to us by settings. There may be variations to prices based on the number of hours a family uses, with reductions for longer hours, or discounts for sibling groups. There may be additional payments for additional services, e.g. lunch and other meals which are not included in these prices.

Prices of school age childcare

- The average prices of childminders and PVI group care provision are similar
- The average price of before and after school provision is less than the average price of childcare provision for school aged children.
- The price of breakfast /before school provision tends to be slightly higher than after school, due to sessions tending to be shorter before school than after school **and the challenges with making them economical to run.**
- The cost of holiday provision varies significantly depending on provider type, location, length of day, number of weeks per year, age of children and adult to child ratio. It ranges from £18.55 to around £30 up to £78 per day.

Figure 8: Average cost of out of school provision

Setting type and average price	Price
Breakfast club per hour	£5.35
After-school club per hour	£4.08
School age childminder per hour	£6.11
Holiday club per day	£34.50

Comparing childcare prices over time

- In 2014, prices in Greenwich for childcare for 0-2 year olds and over 2's were significantly less than the London average
- Prices of childcare for babies and infants under 2 in Greenwich are now more in line with those across London for both groupcare and childminding provision.
- For children over 2 childminding places are cheaper than the London average and group care is in line with the London average

- Prices have increased in Greenwich in the last year but remain in line with London, except over 2 childminding places, which remain slightly under.

6. Quality of Early Years Education and Childcare in our area

Ofsted inspection grades

All childcare providers must register with and be inspected by Ofsted. Inspected providers are given an overall grade for the quality of their provision. Childminders and private and voluntary providers are on the Early Years Register, and schools and standalone maintained nursery schools are on the Schools register. The grades for both registers are equivalent. Schools with nurseries have an overall inspection grade for the whole school and most also have separate early years grades.

Both schools and early years providers have four possible Ofsted grades: ‘outstanding’, ‘good’, ‘requires improvement’, and ‘inadequate’. Where the provision has no children on roll. The inspection judgement is that the provider either does or does not meet the requirements for registration (i.e. “Met” or “Not Met”). Some providers are still awaiting their first full inspection. These providers are excluded from our calculation.

Nursery classes in independent schools do not generally have an Ofsted grade.

Figure 9: Ofsted outcomes for childcare and early learning provision

Type of provision (as at 31st March 2020)	Total number of providers	Newly registered	Number achieving met, good or outstanding of those inspected	% achieving met, good or outstanding of those inspected ³
Childminder	332	70	239	91%
Maintained Nursery	4		4	100%
Out of School	38	15	22	96%
PVI	114	27	79	91%
School	58	1	53	93%
Grand Total	547	113	397	91%

³ The % achieving good or outstanding relates only to provision which has been inspected (calculation excludes newly registered provision) and the judgement relates to the early years and childcare provision, not overall effectiveness.

There have been no Ofsted inspections of settings throughout the pandemic. Ofsted carried out some monitoring visits in the Autumn 2020 term and anticipate, at time of writing, to resume inspections from January 2021. This of course is dependent on the rate of Covid-19 infections and associated restrictions / regulations

Section 7: Covid-19

When the national lockdown came into force on 23 March 2020 the early years and childcare sector were asked to stay open to support the childcare needs of vulnerable children and those of parents who were critical workers. This remained the case throughout, with the sector opening to “all children” from 1 June 2020, working initially in small groups / bubbles (this requirement was lifted at the end of the Summer term).

Throughout this time the Local Authority, via the Early Years and Childcare Service, adapted quickly to the changing situation and focused on supporting providers to:

- Understand and apply the changes in guidance and subsequent iterations
- Provide places across the borough for all eligible children who required it
- Be Covid Secure and operate safely
- Ensure if closed, children of critical workers and vulnerable children had alternative provision
- Maximise any financial support available
- Adapt business operating models, which included merging provision
- Work to the disapplied Early Years Foundation Stage temporary regulations
- Work through any issues arising relating to fee-paying parents and contracts
- Provide regular and accurate data on take-up of provision by vulnerable children and children of critical workers
- Worked with the Families Information Service to broker places for the children of critical workers coming into the borough
- Worked across the council, specifically with Planning and Rates departments to support childcare delivery

At the beginning of the lockdown period work was carried out with the local hospital and NHS providers, as well as Royal Greenwich Human Resources teams, to make sure that critical workers knew what was available locally and how to access it. Throughout lockdown there were sufficient places for eligible children and there were no reports of critical workers, working or living in the borough, having issues with accessing what they needed.

Financial support from Central Government

There were / are a range of support offers for businesses; a key task for the local authority was to make sure that providers were aware of what was available and how to access it.

Funded places

The Department for Education (DfE) instructed local authorities to pay providers, across all sectors, in the Summer term at the same rate as the Spring term irrespective of how many children were attending or whether the setting was opened or closed. Autumn 2020 funding was also enabled for all open settings at the same rate as Autumn 2019, so that the impact of any low take-up due to Covid-19 was mitigated. If settings close or partially close due to Covid-19, whereby confirmed cases result in periods of self-isolation (staff and children) funding continues as if the setting was open.

Business Interruption Loan Scheme

Only 9% of providers reported that they had accessed the scheme. Due to the business set-up / model of many settings and the limitations of the scheme many were ineligible. Of those who were eligible but did not take up the offer it was because they wanted to resist taking on a loan.

Coronavirus Job Retention Scheme

81% of providers reported that they had accessed this scheme; they were able to do this based on their private income and used February 2020 as a “typical month” on which to make their calculations.

Self-Employment Income Support Scheme

Two-thirds of childminders reported that they had accessed the scheme; unfortunately, many were not able to get any support as they were relatively new to childminding. A handful of childminders were able to access Universal Credit during lockdown.

Delaying payments to HMRC

This offer was made to businesses as part of the support available. In terms of groupcare providers, 42% took up the offer with 23% choosing not to and 11% unaware that this was an option for them.

This was quite different for childminders where only 13% took up the offer of deferring payments, 65% choosing not to and again 11% unaware that this was an option for them.

Feedback from the sector

Independent research was undertaken during the period late June – Early August 2020. This included fieldwork, surveys and telephone interviews. A sample of 50 groupcare settings and seven childminders were interviewed with a complimentary online survey for others.

Overall feedback from the sector is that there has been significant loss of income and revenue throughout the period and to date. Restrictions to trading throughout lockdown meant that provision paid for by parents either stopped promptly or was significantly reduced. Once settings were able to reopen to all children in June, the rate of purchased places and additional hours was less, due to changes in parent's work patterns/hours and parental confidence in using provision during the pandemic.

Occupancy

Demand for places was significantly reduced; initial Government advice encouraged critical workers who could have their children cared for at home to do so. This message did change, and parents were encouraged to take up places / send children to school, the demand for places was lower than previously experienced, ranging from 20%-63% reduction.

Financial pressures

Whilst some financial support was put in place and elements available to some providers, the monetary impact of the pandemic has been significant. Providers report high levels of stress and worry about their sustainability and uncertainty for the future with so much still unknown.

Lower than expected take-up is a key feature but also the full extent of the impact on the sector of parental un/employment is yet to be known; again, this uncertainty is making it difficult to confidently plan and assume sustainability.

The added costs of addressing additional cleaning, PPE and signage have also had an impact. Providers had many examples of where the costs of previous regular purchases of gloves, for example, had exponentially increased – as much as 1000% in one case, but on average between 100% and 200%.

Delivery of the Early Years Foundation Stage

A total of 29% of group care providers and 37% of childminders noted that there was an impact on the delivery of the curriculum to children through this time with 54% and 40% respectively asserting that it had not impacted.

There was however shared concern from providers noting how some children, when they returned in June and July, were less confident and their social skills had been negatively affected. With several noting children returning to settings in nappies where they had previously stopped using them (in the daytime at least).

All providers expressed worry about the impact on children's socialisation, school readiness and all areas of development; with particular concern for children who already were already at risk of poorer outcomes.

Fee-paying throughout the period

The approach taken by providers was variable and contracts between providers and parents did not stretch to include a pandemic scenario. Guidance from the DfE requested providers to be "reasonable and balanced", so was open to interpretation. Some providers made no charges whilst closed to non-eligible children, with others offering reductions starting at 20%. As expected, this issue caused considerable stress for parents as well as providers and both parties were supported in coming to a resolution. The matter was taken up by the Competitions and Markets Authority (CMA) and in late July they published an open letter to providers. Whilst no changes in law were made the CMA asked them to consider their contracts and arrangements with consumers (parents and carers) and take any necessary steps to ensure they comply with the law. They did note that in the main, providers were being reasonable but there were instances of excessive fees being charged when no service was being delivered.

Summary

Take-up in the Autumn 2020 term has been a mixed picture with some providers closer to full occupancy than anticipated. However, the additional hours and paid places are still not at the level expected for the term. At the time of writing London is into the first week of further restrictions as it has entered "tier two". The impact on parental confidence and employment is likely to be further understood in the coming weeks and uncertainty about take-up in Spring 2021 is a concern.

Recommendations

The key recommendations arising as a result of this review are that:

- Local Authority promotes the value and benefits of childcare and early learning to parents to encourage take-up

- Providers are supported in delivering throughout this stressful time by being kept up to date with guidance and relevant information
- Local Authority works with providers to support digital / virtual introductions to settings for new parents
- Local Authority continue to support the sector with the information about any grants or financial support relating to PPE resources

Section 8: Data Sources

GLA 2018-based BPO mid-year estimates (April 2020)

Early Years Headcount Royal Greenwich (Autumn term 2019)

Pupil level school census January 2020

January 2020 SEN2 return

Ofsted inspections report March 2020

Royal Greenwich Local Ofsted Outcome Tracker

2018 ONS with GLA projection data

2020 Place Group Childcare Sufficiency and Sustainability Intelligence Assessment

Glossary

Types of settings

Childminder – private business which is delivered from the registered person’s own home either alone or with assistants

Groupcare – care provided on non-domestic premises delivered by a private, independent, community or voluntary sector organisation; this can be full day or sessional care

School – local authority / voluntary maintained or academy school setting

Nursery school – Nursery school (all nursery schools in Greenwich are local authority maintained)

Providers / provision – all of the above

Types of registration

Early years register - providers working with children aged from birth to five. Providers must deliver the Early Years Foundation Stage (EYFS) which brings together care and learning. Typically, this will be full daycare, preschools, childminders and some out of school provision (holiday schemes or after school clubs).

Compulsory childcare register – this is childcare for children aged five to seven. Typically, this will be childminders and out of school providers (unless they are exempt).

Voluntary childcare register - this is for providers who are not required to register but can choose to do so. Typically, this will be nannies, activity-based settings, short term care and care for children aged eight and over.

Funded provision / Free childcare - is funded by the government to childcare providers via the local authority.

Disadvantaged 2 year olds - Some children aged 2 whose families receive certain benefits (including low income families in receipt of in-work benefits), or those who meet additional non-economic [criteria](#) are entitled to 15 hours per week term time.

3 & 4 year olds - Universal entitlement - All children aged 3 and 4 are entitled to 15 hours per week during term time until they start reception class in school.

3 & 4 year olds - Extended entitlement - Children aged 3 and 4 where both parents working, or from lone parent families where that parent is working, are [entitled](#) to 30 hours per week during term time until they start reception class in school

Our Statutory Duties and Responsibilities

Early education and childcare is legislated for in the Childcare Act 2006 and 2016 and the Children's Act 2004.

We have a duty to ensure there is sufficient high quality childcare for working parents of children aged 0-14 (or up to 18 for disabled children).

Two main objectives of the Childcare Act 2006 are to:

- Improve the well-being of all young children and reduce inequalities
- Drive up the quality of childcare provision

Our **statutory responsibilities** also include:

- Securing **sufficient high quality funded early learning places for disadvantaged 2 year olds** (who meet prescribed criteria relating to low income, being in care or having left care through a permanence arrangement, or having special educational needs or a disability) to access 15 hours free early learning each week for 38 weeks a year;
- Ensuring there are **sufficient early learning places for all 3 and 4 year olds** whose parents want to access 15 hours free early learning each week for 38 weeks a year and an extended entitlement of 30 hours per week for eligible working families;
- Ensuring we meet our **duties under the Equality Act 2010** when securing early learning places; and
- Providing **information, advice and assistance to parents and prospective parents** who intend to use childcare

Children's Centres by area and ward

	Ward	Centre
Central	Glyndon Plumstead Shooters Hill Woolwich Common Woolwich Riverside	Brookhill Slade Glyndon Plumstead Plumstead Common Cardwell (PS) Mulgrave (PS) Eglinton (PS)
East	Abbey Wood Glyndon Thamesmead Moorings	Abbey Wood (NS) Discovery (PS) Waterways Mulberry Park
South	Blackheath Westcombe Coldharbour and New Eltham Eltham North Eltham South Eltham West Kidbrooke with Hornfair Middle Park and Sutcliffe	Storkway Shooters Hill Vista Field Eltham Alderwood (PS) Greenacres (PS)
West	Blackheath Westcombe Charlton Greenwich West Peninsula Woolwich Riverside	Rachel McMillan (NS) Robert Owen (NS) Sherington (PS) Pound Park (NS) Invicta (PS) Quaggy
<i>(NS): Linked to nursery school (PS): Linked to primary school</i>		