



Royal Greenwich Childcare Sufficiency Assessment Annual Update Autumn 2022

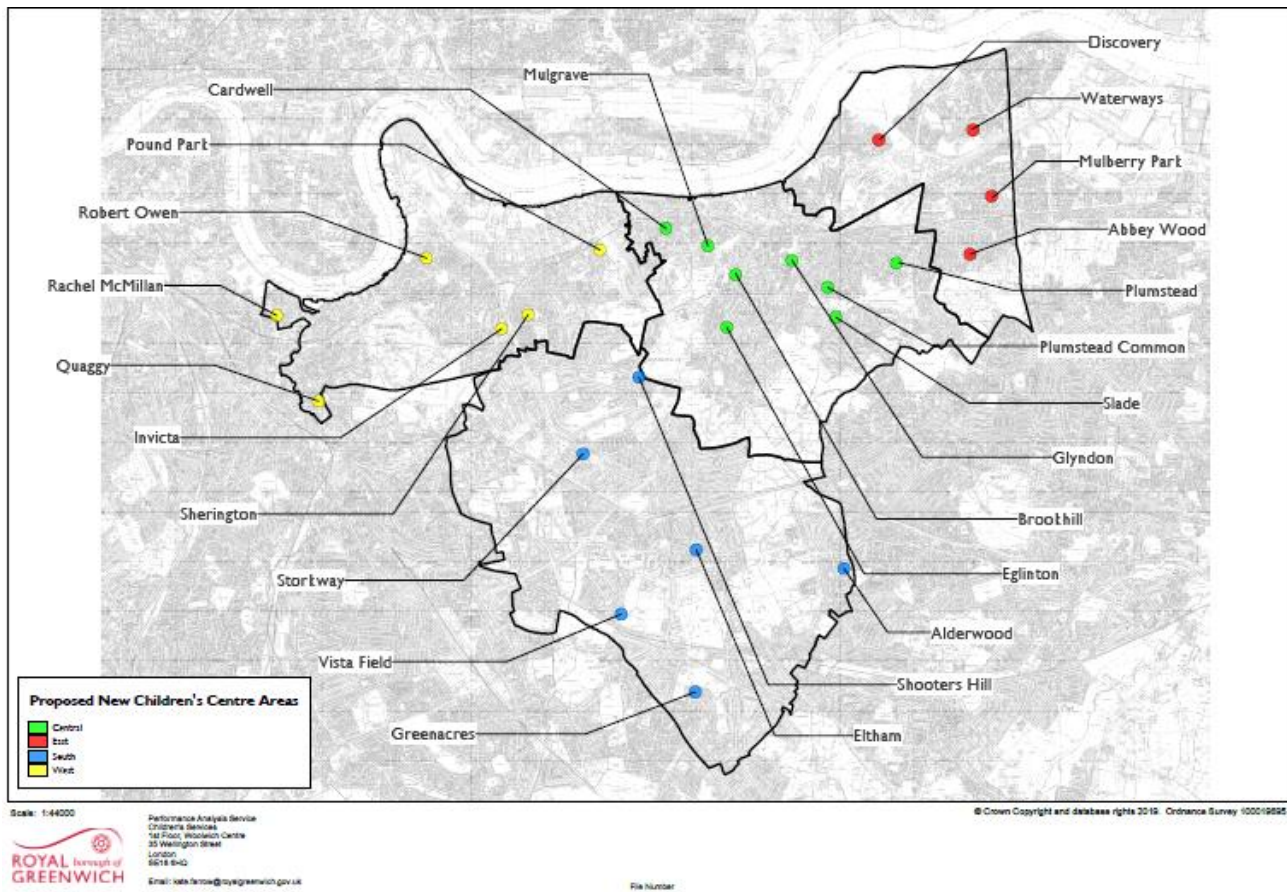


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Children's Centres Areas

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

Figure 1: Royal Greenwich Children's Centres Areas



I. Overall assessment and summary

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.

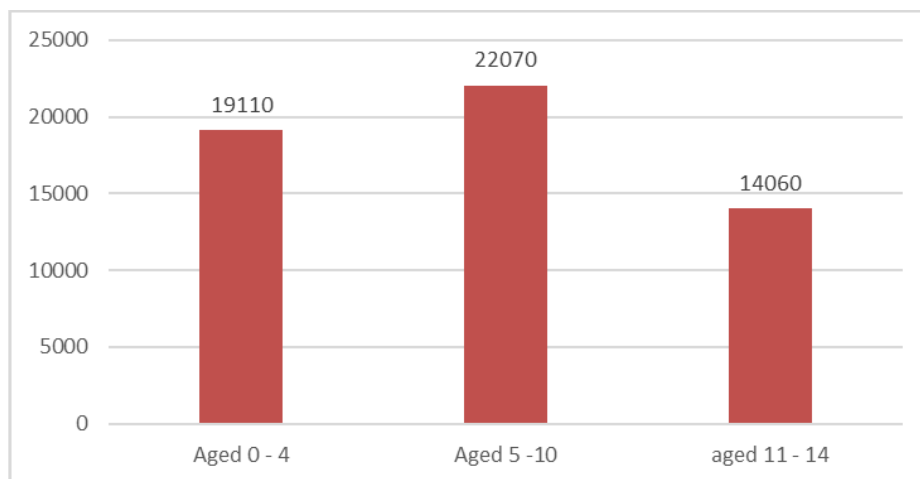
As well as our statutory duties and responsibilities there have been a number of changes that have, and will continue to have impact on the provision, take-up and delivery of early learning and childcare.

Covid 19 impacted on business sustainability of providers who had the least flexible model and the childcare needs of parents also adapted to hybrid working. It is a mixed picture with some providers reporting vacancies and others with waiting lists. Providers do expect to see increasing demand going forward. The local authority continues to promote the free early learning entitlements and provide both business and marketing support and advice.

At the time of writing this update document there is sufficient early learning and childcare provision in Royal Greenwich.

2. Demand for childcare

Figure 2: Royal Greenwich population estimates by childcare age groups, 2022



Source: GLA 2022-based BPO mid-year estimates

Children with Special Educational Needs and Disabilities

Children with lower level additional needs

As at January 2022

- **6,581 of children attending Greenwich schools** receive SEN support; this reflects 15% of the school population. The most prevalent primary need for SEN support pupils is Speech, Language and Communication needs (SLCN)

Children with higher level additional needs

As at January 2022

- **1,633 children attending Greenwich schools** have an **Education, Health and Care Plan (EHCP)**; this reflects 3.6% of the school population. Autistic Spectrum Disorder (ASD) is the most prevalent primary need, accounting for 47% of these EHCPs, followed by SLCN at 16%
- When focusing on the Greenwich 0-25 population – **2,180 CYP have an EHCP, 2,018 of which are aged 0-19**; this reflects 3% of the 0-19 resident population. As with schools, ASD is the most prevalent need in this cohort at 45%
- There are **65 children aged 0-4** in the resident EHCP cohort. 22 (34%) have a primary need of SLCN and 20 (31%) ASD

3. Supply of childcare

Types of childcare available

- There are 633 childcare providers (including 4 maintained nursery schools and 64 maintained and faith schools) in Royal Greenwich
- Close to two thirds (68%) 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 settings

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

- 86% of childcare providers (543) in the borough offer early years provision; either funded early learning places, childcare or both.
- They offer a maximum of 11,270 (estimated) early years childcare places. These figures include schools that provide early years or wraparound care.
- Access to extended early learning provision for three and four year olds has been maintained across the sector in challenging times and broadly demonstrates the resilience of the sector in Royal Greenwich.

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

Type of Provision	Number of providers	Number of registered places including estimates
Childminder	325	1773
Maintained Nursery	4	454
Out of School	42	1420
PVI	118	5555
School	53	2042
Special School	1	26
Grand Total	543	11270

The data in this table was correct on: 31/03/2022

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

Source: Ofsted March 2022 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 2026

	Childminder	Maintained Nursery	Out of School	PVI	School	Special School	Grand Total	Estimated 0-4 population change by 2026	FTE shift based on pop change	Est. minimum FTE required for 2026
Central	452		264	1552	789	26	3083	-7.9%	-244	2839
East	380	78	145	231	442		1276	-3.5%	-45	1231
South	631		638	1765	486		3520	-4.3%	-151	3369
West	310	376	373	2007	325		3391	-2.6%	-88	3303
Grand Total	1773	454	1420	5555	2042	26	11270	-4.8%	-541	10729

Source: Ofsted March 2022
GLA 2022-based BPO mid-year estimates

The estimated -5% reduction in the 0-4 population could lead to an overall over supply of provision.

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 offering provision from between **5am 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 Central, East and South areas.

School age providers and places

- There are 508 providers for school age children during term time
- There 58 primary schools (including faith schools and special schools). 8 schools have split sites.
- There are 20 secondary schools including the Pupil Referral Unit
- There are 50 groupcare providers of childcare for school age children (both school based, school commissioned and independent, offering out of school hours childcare)

- There are 380 childminders who may provide care for school age children.
- There has been an increased interest in school holiday provision in response to the Holiday Activities Fund

Tracking supply of childcare for school age children is difficult because not all of this type of provision is registered 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 and study provision after school or in the holidays.

School age provision: typical hours provided

- Demand for more flexible school based breakfast/ before and after school provision, longer hours/extended days and wrap-around childcare has been identified.
- Schools are responsive to parental need and demand for childcare with schools offering 30-hour places to expand provision or working in partnership with local childcare providers.
- There is growing demand for affordable holiday provision

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, the 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 Spring 2022

Figure 5: Take up of funded places

Funded take up	2yo	3 & 4yo Universal	3 & 4yo Universal & extended	3 & 4yo Extended	Grand Total
Childminder	30	39	71	10	150
Maintained Nursery	185	250	160	0	595
PVI	607	1215	851	4	2677
School	18	1616	453	0	2087
Grand Total	840	3120	1535	14	5509

One place is calculated as 15 hours of provision

- 69% of those who were eligible took up 2-year-old funded provision in Spring 2022
- 79% of 3 year olds and 79% of 4 year olds of those who were eligible took up funded universal provision in Spring 2022
- 52% 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 2022)
Childminders	86
Nursery classes in schools	53
Maintained nursery schools	4
Private, voluntary & independent nurseries	112

Total	255
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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 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 £20 to around £30 up to £50 per day.

Figure 8: Average cost of out of school provision

Setting type and average price	Price
Breakfast club per hour	£4.56
After-school club per hour	£5.23
School age childminder per hour	£6.42
Holiday club per day	£29.50

Comparing childcare prices over time

- Prices of childcare for babies and infants under 2 in Greenwich are 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 2s childminding places which continue to be a little cheaper.

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’. 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 2022)	Total number of providers	Newly registered	Number achieving met, good or outstanding of those inspected	% achieving met, good or outstanding of those inspected *
Childminder	374	106	250	93%
Maintained Nursery	4	n/a	4	100%
Out of School	63	40	21	91%
PVI	118	23	87	92%
School	53	11	41	98%
Grand Total	612	180	403	93%

* 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.

Ofsted have resumed Ofsted inspection activity following interruption during Covid 19. Taking into account the impact on children during their formative months and years, Ofsted are focusing on “minding the gap” through emphasis on communication and language, physical development and personal, social and emotional development and wellbeing of children.

Feedback from the sector

Post Covid 19 Demand

The majority of providers who responded to the survey report that demand had stabilised and expect gradual increase between Autumn 2022 and Spring/Summer 2023.

In some cases demand for full-time and 30 hours places has increased.

Private, voluntary and independent providers and childminders indicated that there is sufficiency of provision in the childcare sector with 895 vacancies and 575 on waiting lists.

Between 66% and 78% of providers reported that they were able to meet demand for 2 year old, 15 hours universal entitlement and 30 hours extended entitlement.

What works well

- Children attending up to 5 hours over 3 days allows the children more opportunities to interact and play both independently as well as benefit from planned adult led activities till the end of the morning or afternoon sessions
- Speed of application, communication with children centre, processing the application and ease of funding payments and returns
- Regular attendance up to 5 hours per session which enables children play with their peers and participate in adult directed activities. This encourages children to develop a sense of belonging, form friendships with others and get used to the nursery routine
- Having flexible options
- Parents who spread the offer over the whole year enables us to manage our numbers better

Priorities going forward

Type of support for parents

Providers indicated that parents need more support with 30 hours around

- Eligibility criteria
- The process of application for places
- How to reconfirm 30 hour places

Type of support for providers

Private, voluntary and independent

- Recruitment and retention
- Staff training
- Special Educational Needs

Childminders

- Marketing and business support
- Registration and inspection
- Networking with peers
- Special Educational Needs

Feedback from parents

- 85% use childcare to go to work and 83% use childcare to support children's play and learning, socialisation and to be ready for school.
- The highest demand is from Monday to Thursday with lower demand on Fridays.
- Of those who no longer use childcare, 67% cite cost as the determining factor.

- Parents identified that they need more help in understanding “free entitlement”. This may reflect that 46% of providers put in place additional charges around the entitlements.
- 11% of parents identified that they had children with SEN and of those speech, communication and language, Autism and ADHD were listed

Feedback from children aged 2-4

What is the best thing about coming to nursery?

All of the children were very positive about the settings they were in but overwhelming the “best things” for most children were making use of the bikes and playing with their childcare practitioner.

- JP aged 4 – “I love everything and the bikes and the cars and the teachers”
- JF aged 2 “I love playing train tracks”
- B aged 2 – “I like learning”

If you could change anything about nursery what would it be?

This big question for little children garnered some interesting responses. Many children didn’t offer any suggestions, others were keen to suggest new equipment, mostly relating to bikes with others thinking big, wanting robots, princesses and to see more butterflies!

- WH aged 3 – “a big, big, big nursery”
- TY aged 3 – “more bird peckers”
- C aged 2 – “bring daddy to play sometimes”

What are the best things about the grown-ups who play with you at nursery?

The children really thought about this answer and the consensus across all of the groups was very positive. The practical help was noted but the majority of children reported that they liked how their childcare practitioners were happy, played with them and were kind.

- JC aged 3 - “They read to me and let me play”
- T aged 3 - “They do good listening”
- A aged 2 – “They give good cuddles”

What can you do at nursery that is different to what you do at home?

The majority of children noted the access to outdoor play opportunities and the equipment both inside and out. Painting and drawing at nursery was also important for many children and most reflected that a key difference was being able to play with their friends and childcare practitioners.

- B aged 2 – “Sit on the carpet and read with my friends”
- JP aged 4 – Grow vegetables or fruit!

Summary of Children's Feedback

While this is a small sample, the responses in regard to outdoor play and the value of the childcare practitioners was consistent. The role of the adult in the learning experience of our youngest children cannot be underestimated and therefore makes recruitment and ongoing opportunities for professional development high priorities for both providers and the Local Authority. In response to the feedback from children the Early Years and Childcare training offer will be shaped to provide opportunities to support the workforce in outdoor play, the role of the adult, attachment and supporting home learning.

Recommendations

- Local Authority promotes the value and benefits of childcare and funded early learning to parents to encourage take-up
- Early Learning providers continue to be supported in adjusting to the focus of the Early Years Foundation Stage framework and learning from Ofsted inspections around “minding the gap”, home learning and school readiness
- Local Authority works with providers to support the workforce in continuing professional development and training and support recruitment and retention
- Local Authority continue to support the sector with the information about financial support, business remodeling and marketing

Section 8: Methodology

GLA 2020-based BPO mid-year estimates (March 2022)

Early Years Headcount Royal Greenwich (Spring term 2022)

Pupil level school census January 2022

January 2022 SEN2 return

Ofsted inspections report March 2022

Royal Greenwich Local Ofsted Outcome Tracker

2020 ONS with GLA projection data

2020 Place Group Childcare Sufficiency and Sustainability Intelligence Assessment

DWP list of eligible 2 year olds August 2021

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	Abbey Wood Charlton Village & Riverside Plumstead & Glyndon Plumstead Common Shooters Hill West Thamesmead Woolwich Arsenal Woolwich Common Woolwich Dockyard	Brookhill Slade Glyndon Plumstead Plumstead Common Cardwell (PS) Mulgrave (PS) Eglinton (PS)
East	Abbey Wood Thamesmead Moorings West Thamesmead	Abbey Wood (NS) Discovery (PS) Waterways Mulberry Park
South	Blackheath Westcombe Charlton Hornfair Eltham Page Eltham Park & Progress Eltham Town & Avery Hill Kidbrooke Park Kidbrooke Village & Sutcliffe Middle Park & Horn Park Mottingham, Coldharbour & New Eltham	Storkway Shooters Hill Vista Field Eltham Alderwood (PS) Greenacres (PS)
West	Blackheath Westcombe Charlton Hornfair Charlton Village & Riverside East Greenwich Greenwich Creekside Greenwich Park Greenwich Peninsula Woolwich Dockyard	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>		