



Royal Greenwich Childcare Sufficiency Report 2023/2024



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Children's Centre area map

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

Figure 1: Royal Greenwich Children's Centre Areas



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 several changes that have, and will continue to have impact on the provision, take-up and delivery of early learning and childcare.

The continuing impact of Covid 19 and the national recruitment and retention challenges are affecting business sustainability of providers. The changes in parental working patterns around hybrid working have begun to settle and a slightly higher number of providers are now reporting waiting lists although the large majority have vacancies. It is therefore a mixed picture across the borough. Most providers do expect to see increasing demand going forward and are actively considering how to expand their provision.

The local authority continues to promote the current free early learning entitlements and is planning business and marketing support and advice for the expansion of the entitlements from 1 April 2024.

The expansion set out below which will have significant impact on parents and carers' capacity to return to work sooner and take up more hours at work and an impact on providers in terms of staff recruitment and business sustainability. The expansion will also have a strategic and operational impact on Royal Greenwich in terms of provision of services to the sector.

The extended funding entitlements for 0–4-year-olds, which are due to be available to eligible working families in April 2024 are

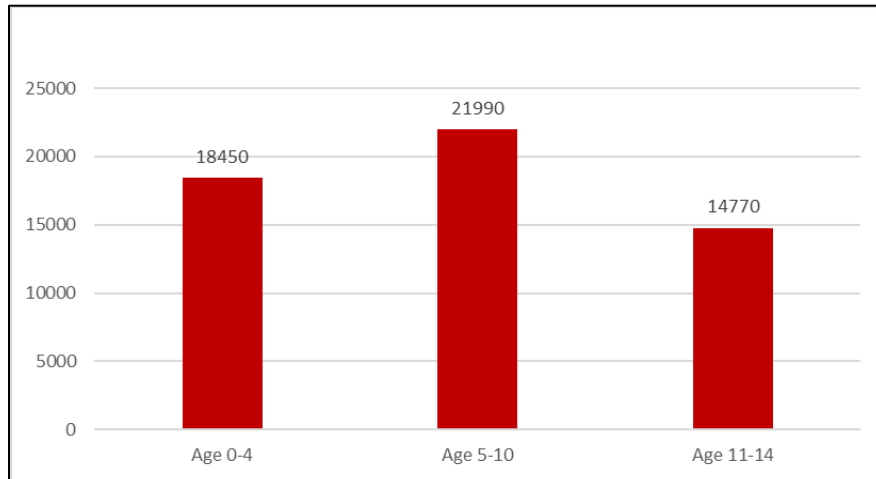
- From **April 2024**, working parents of two-year-olds will be able to access 15 hours of free early learning and childcare (from the term after they turn 2)
- From **September 2024**, 15 hours of free early learning childcare will be extended to all children from the age of nine months (from the term after they turn 9 months)
- From **September 2025**, working parents of children under the age of five will be entitled to 30 hours free early learning childcare per week.

At the time of this report, overall there is sufficient early learning and childcare provision in Royal Greenwich.

Profile of demand

Population estimates

Figure 2: Royal Greenwich population estimates by childcare age groups, 2023



Source: GLA 2023-based BPO mid-year estimates

Children with Special Educational Needs and Disabilities

Children with lower-level additional needs

As of January 2023

- **6,965 of children attending Greenwich schools** receive Special Educational Needs (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) (39%) followed by Social, Emotional and Mental Health need (SEMH) (19%)

Children with higher level additional needs

As of January 2023

- **1,796 children attending Greenwich schools** have an **Education, Health, and Care Plan (EHCP)**; this reflects 4% of the school population. Autistic Spectrum Disorder (ASD) is the most prevalent primary need, accounting for 45% of these EHCPs, followed by SLCN at 19%
- When focusing on Greenwich 0–25-year-olds for whom the authority maintains their EHCP, – **2,446 CYP have an EHCP, of which 2,242 are aged 0-19**; this reflects c.3% of the 0-19 resident population. As with schools, ASD is the most prevalent need in this cohort at 46%

- There are **82 children aged 0-4** in the resident EHCP cohort. 29 (35%) have a primary need of ASD and 24 (29%) SLCN. 73% of the 0-4 EHCP cohort are boys, consistent with the gender split for all ages both at resident and school population level.

As of November 2023:

13.5% of respondents to the 2023 Royal Borough of Greenwich Childcare Sufficiency Assessment Parental Demand Survey stated that at least one child aged 0-19 years with Special Educational Needs and Disabilities (SEND) was a member of their family. The most frequent three SEND types were (in order of frequency):

1. Speech, Language and Communication Needs
2. Autistic Spectrum Condition/Disorder
3. An undiagnosed SEND

and the most frequent barrier to accessing formal childcare, stated by these relevant respondents was I find formal childcare too expensive (15%), followed in frequency by: I prefer my children to be looked after by family and/or friends (7%).

Supply of childcare

Types of childcare available

- There are 648 childcare providers (including 4 maintained nursery schools and 68 primary schools) in Royal Greenwich of which 54 have nursery classes.
- Just over half (55%) 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 11% 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

- 80% of childcare providers (517) in the borough offer early years provision; either funded early learning places, childcare or both.

- They offer a maximum of **11,248** (estimated) early years childcare places. These figures include schools that provide early years or wraparound care.
- There has been a small reduction in the number of Early Years registered childminders (from 325 to 293) which is in line with the national trend and due to childminders moving from early years register due to lack of demand following Covid 19 and to the childcare and voluntary registers. There is a small increase in the number of private, voluntary, and independent (from 118 to 121) and out of school (from 42 to 44) providers which means that the overall number of available places is largely unaffected.
- 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	293	1598
Maintained Nursery	4	454
Out of School	44	1381
PVI	121	5793
School	54	1996
Special School	1	26
Grand Total	517	11248

The data in this table was correct on: 31/03/2023

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

Source: Ofsted March 2023 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 2028

	Childminder	Maintained Nursery	Out of School	PVI	School	Special School	Grand Total	Estimated 0-4 population change by 2028	FTE shift based on pop change	Est. minimum FTE required for 2028
Central	446		216	1478	743	26	2909	4.6%	134	3043
East	336	78	58	329	442		1243	5.8%	72	1315
South	596		658	1821	486		3561	7.0%	249	3810
West	220	376	449	2127	325		3497	8.7%	304	3801
Grand Total	1598	454	1381	5755	1996	26	11210	6.4%	717	11928

Source: Ofsted March 2023 GLA 2023-based BPO mid-year estimates

The estimated 6% increase in the 0-4 population could lead to an overall undersupply of provision. This table does not factor in the eligibility changes due April 2024. As an extensive programme of market stimulation and support is planned considering the expansions of the entitlements, there is confidence that demand, and supply will be balanced in overall terms.

School aged providers and places

- There are 414 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 Pupil Referral Units
- There are 59 groupcare providers of childcare for school age children (both school based, school commissioned and independent, offering out of school hours childcare
- There are 355 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 there is some under-counting of 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.

Quality of Early Years Education and Childcare

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 of 31st March 2023)	Total number of providers	Newly registered	Number achieving met, good or outstanding of those inspected	% achieving met, complaint, effective, good or outstanding of those inspected *
Childminder	354	58	274	93%
Maintained Nursery	4	0	4	100%
Out of School	58	18	38	95%
PVI	123	21	90	88%
School	68	12	52	93%
Grand Total	607	109	458	92%

* 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. **94%** of Ofsted registered providers are compliant, met, good or outstanding.

Ofsted continue to consider the impact of Covid 19 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 Early Years and Childcare Providers

Essential to the theme of the supply of formal childcare across the Royal Borough is the perspective of its' early years and childcare providers.

In Autumn 2023, childcare providers were invited to engage with an offer of a structured telephone interview or virtual e-interview which addressed pivotal sector themes aligned to occupancy, business modelling, sustainability, recruitment and retention of staff – and, where relevant, provider's views on the extended funding entitlements for 2–4-year-olds, which are due to be available to eligible working families in April 2024

Engagement with this request accounted for structured interviews being completed/responses being received from:

- 161 early years childcare providers/settings (with 5 completed via an online function) – i.e. (a) Private, Voluntary and Independent Sector Nurseries; Maintained Sector Nursery Classes and Nursery Classes in Schools
- 141 registered childminders (with 60 completed via an online function)
- 49 out of school childcare providers (with 3 completed via an online function), including after school clubs, before school/breakfast clubs and holiday play schemes. Of these respondents, 88% stated that an after-school club was their main provision

The feedback from these formal childcare providers is outlined below and also specific feedback is summarised in Funded Early Education and Fees and Pricing below.

Occupancy

All responding **early years childcare providers/settings** were invited to state whether they had a **waiting list** at the time of their interview in September 2023.

44% stated that they did - and the age cohort that was experiencing the most frequent incidence of waiting lists was 2 years followed in frequency by 3 years.

The incidence of waiting lists for early years childcare providers/settings were highest in the South area.

Similarly, all responding **registered childminders** were invited to state whether they had a waiting list at the time of their interview in September 2023.

17% stated that they did - and the age cohort that was experiencing the most frequent incidence of waiting lists was 0-12 months, followed (closely) in frequency by 1 year.

The incidence of waiting lists for registered childminders was highest in the Central area.

47% of early years childcare providers/settings stated that they could provide childcare for babies aged 0-9 months. Of those that did not, (only) 5% stated that 0-9 months was an age cohort that they would consider providing places for over the next 3 years.

In comparison, 68% of registered childminders stated that they could provide childcare for babies aged 0-9 months. Of those that did not, 31% stated that 0-9 months was an age cohort that they would consider providing places for over the next 3 years.

All early years childcare providers/settings were also invited to state whether they had any **vacancies** at the time of their interview, in September 2023. 66% stated that they did - and the age cohort that was experiencing the most frequent incidence of vacant places was 3 years, followed in frequency by 2 years.

The incidence of vacancies at early years childcare providers/settings was highest in West area.

All registered childminders were invited to state whether they had any vacancies at the time of their interview, in September 2023.

45% (20% less than the percentage that was observed for the early years childcare providers/settings) stated that they did - and the age cohort that was experiencing the most frequent incidence of vacant places was 5-8 years, followed in frequency by 2 years. The incidence of vacancies at registered childminders was highest in the Central area.

All after school club providers were invited to state whether they had any vacancies at the time of their interview in September 2023.

53% stated that they did - and the age cohort that was experiencing the most frequent incidence of vacant places was 5-8 years, followed in frequency by 8-11 years. The incidence of vacancies at after school clubs was highest in the West area.

Hours of Provision

Formal 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.

- For early years childcare providers/settings the most frequent standard opening time was: 8:00am and the average opening time was 7:54am. For the same cohort, the most frequent standard closing time was: 6pm and the average closing time was 05:42pm.
- For registered childminders, the most frequent standard opening time was: 8:00am and the average opening time was 7:46am. For the same cohort, the most frequent standard closing time was: 6:00pm and the average closing time was 5:53pm.
- For after school clubs the most frequent standard opening time was: 3:30pm and the average opening time was 3:43pm. For the same cohort, the most frequent standard closing time was: 06:00pm and the average closing time was 6:10pm.

Staffing

In terms of the early years childcare providers/settings - the following metrics of staff were employed throughout the borough:

Figure 10: Numbers of staff employed within early years childcare providers/settings in the Royal Borough as stated by respondents

Children's Centre Planning Area	Average number per setting Qualified Staff	Most frequently stated number Qualified Staff	Average number per setting Unqualified Staff	Most frequently stated number Unqualified Staff
Royal Borough	8	3	5	2

58% of early years childcare providers/settings stated that they were experiencing difficulties with recruitment in autumn 2023, and (a much lower percentage at) 25% of early years childcare providers/settings stated that they were experiencing difficulties with retention in September 2023.

For recruitment, the three most frequent types of posts/positions that challenges were being experienced for were (in order of frequency):

1. Qualified Level 3 staff/positions
2. Qualified Level 2 staff/positions
3. Nursery teachers

In comparison, only 6% of out of school childcare providers/settings stated that they were experiencing difficulties with recruitment in autumn 2023, and (the same percentage) 6% of out of school childcare providers/settings stated that they were experiencing difficulties with retention in September 2023, although 16% stated that had experienced incidences of staff deciding themselves to leave their setting in the past 12 months.

Figure 11: outlines the extent to which early years childcare providers/settings were concerned about the factor of workforce recruitment and retention over the next 24 months

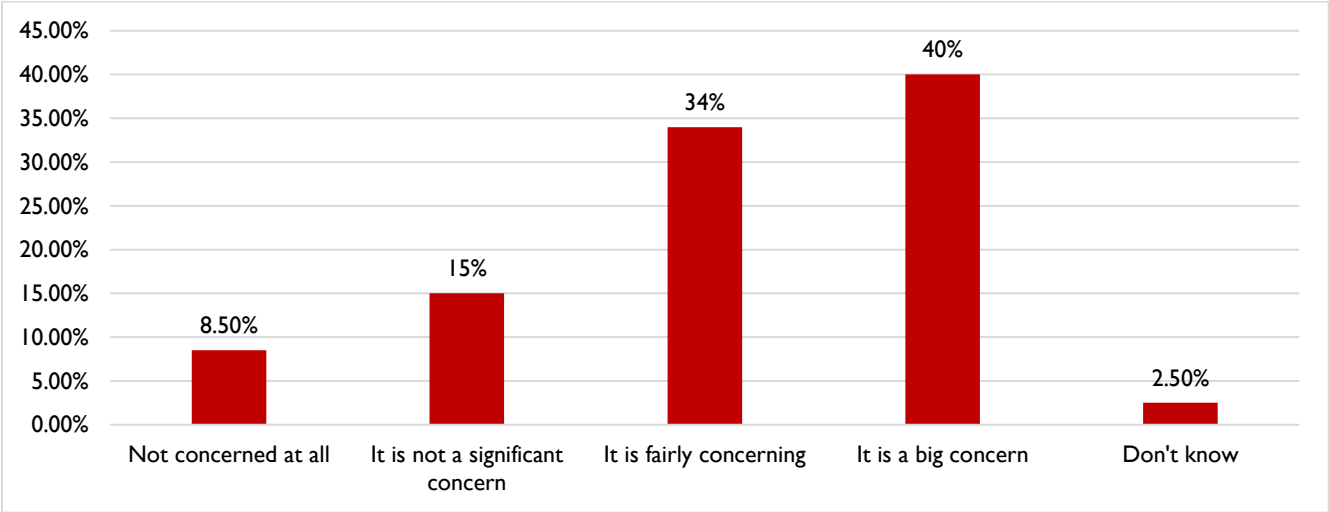
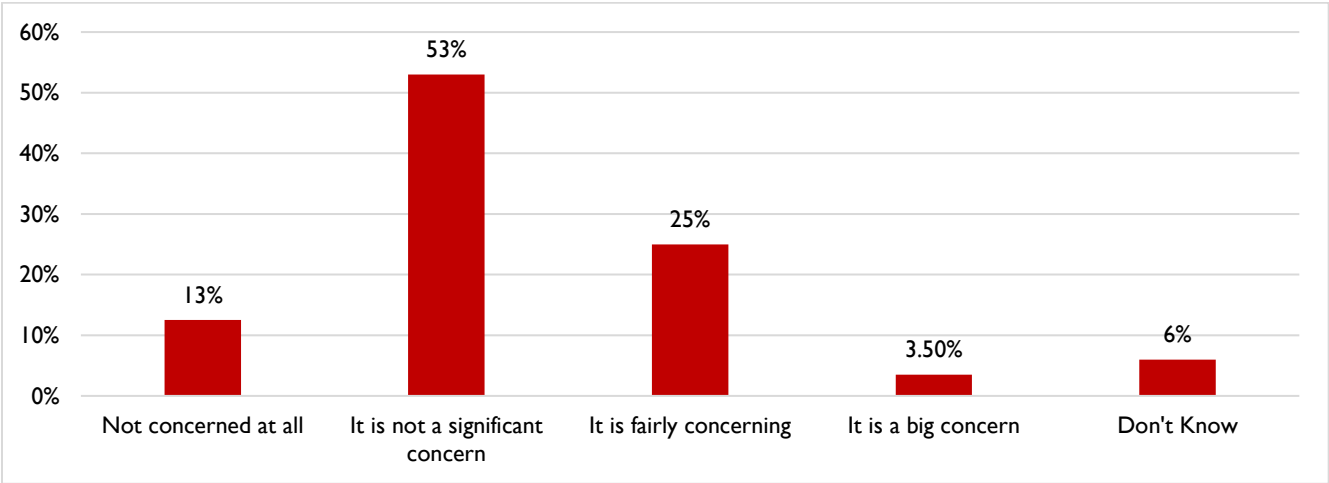


Figure 12: outlines the extent to which out of school childcare providers were concerned about the factor of workforce recruitment and retention over the next 24 months



Supporting Children with SEND

82% of early years childcare providers/settings stated that they had at least one staff/team member with a SEND themed qualification, with the three most frequent types of experience/qualification being:

1. A (trained) SENCO qualification
2. Specific SENCO Level 3 qualification
3. Autism-themed qualification

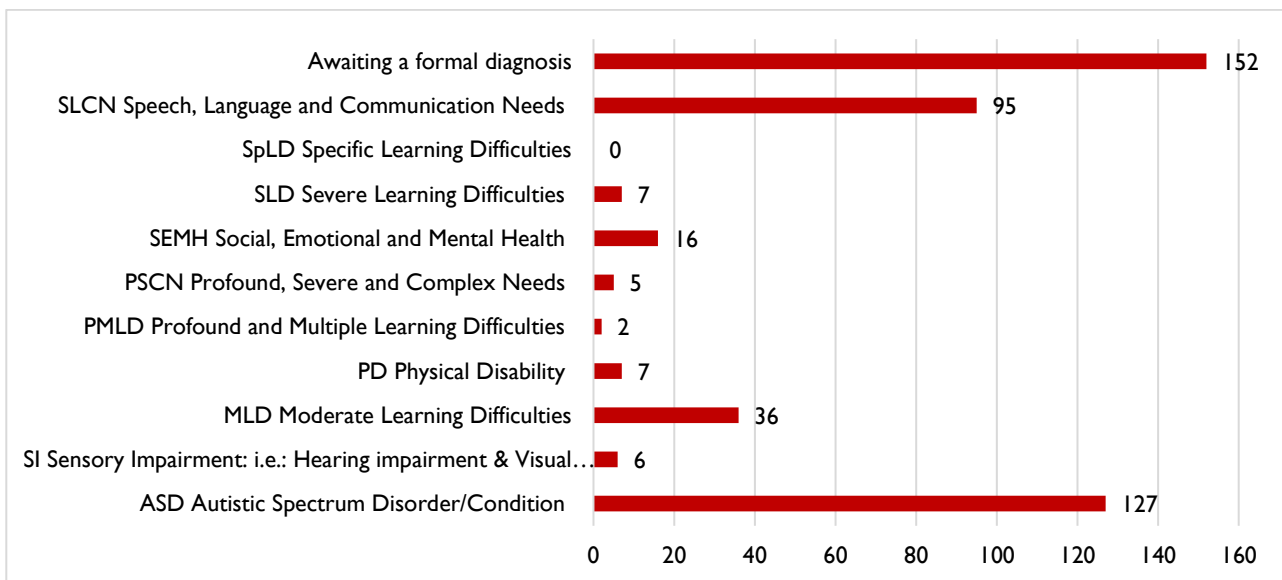
21% of *responding* registered childminders had a SEND themed qualification, with the types of experience/qualification being:

1. A qualification in 'SEND Education' attained when working in a childcare setting
2. Speech and language-themed qualification
3. Level 3 SEND-themed qualification

28% of out of school childcare providers stated that they had at least one staff/team member with a SEND themed qualification, with the two most frequent types of experience/qualification being:

1. A qualification in 'SEND'
2. Experience gained of delivering 1-1 support with a pupil

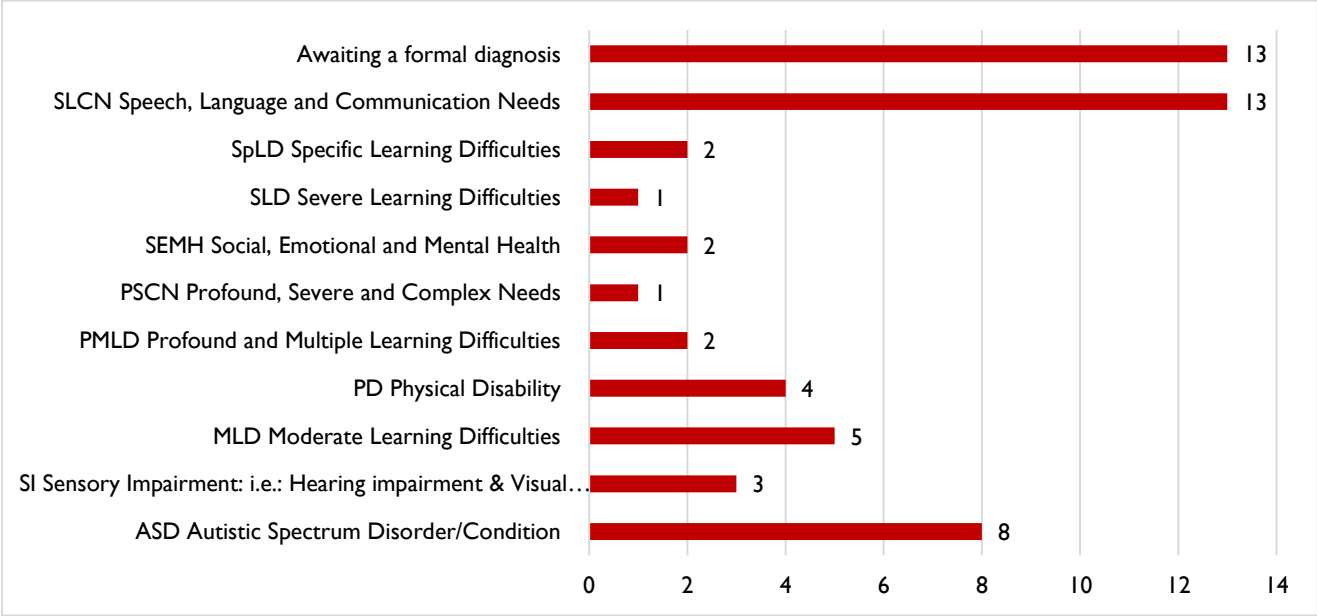
Figure 13 - Responding early years childcare providers/settings outlined the numbers of children with SEND (by designation type) that they were caring for, in September 2023:



The three most frequent SEND types that settings were providing childcare for were, in order of frequency:

- 1. Autistic Spectrum Condition
- 2. Speech, Language and Communication Needs
- 3. Moderate Learning Difficulties

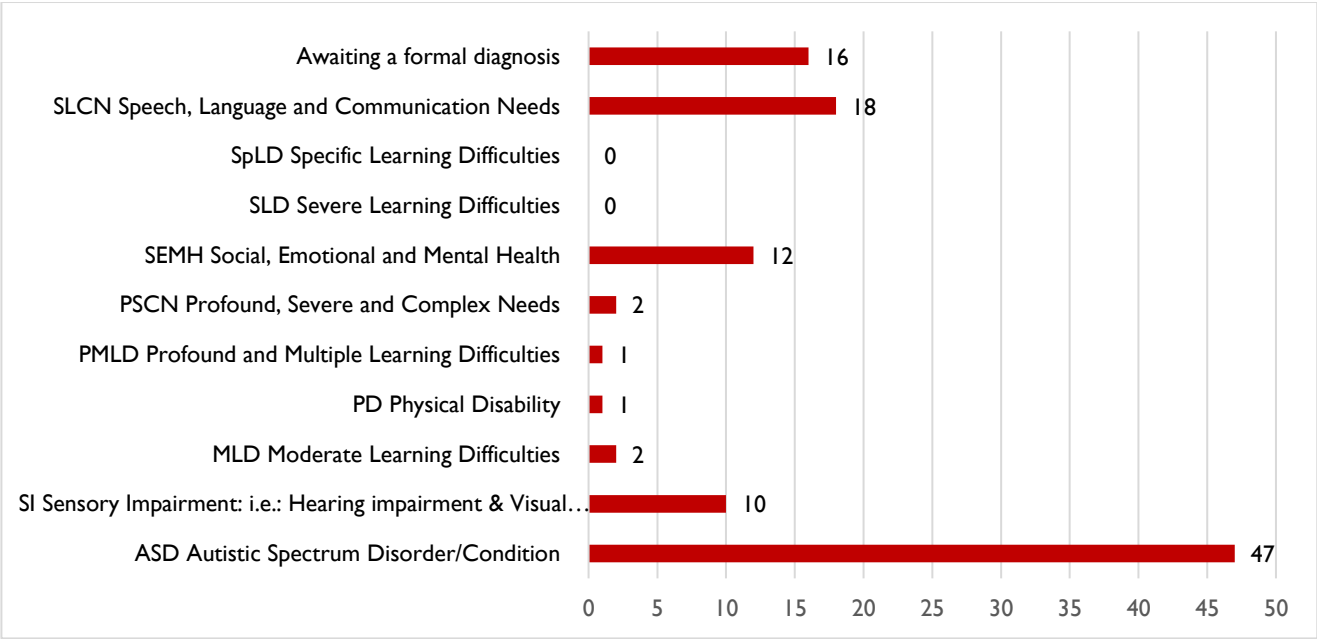
Figure 15: Responding registered childminders outlined the numbers of children with SEND that they were caring for, in September 2023:



The three most frequent SEND types that registered childminders were providing childcare for were, in order of frequency:

- 1. Speech, Language and Communication Needs
- 2. Autistic Spectrum Condition
- 3. Moderate Learning Difficulties

Figure 17: Responding out of school childcare providers outlined the numbers of children with SEND that they were caring for, in September 2023:



The three most frequent SEND types that settings were providing childcare for were, in order of frequency:

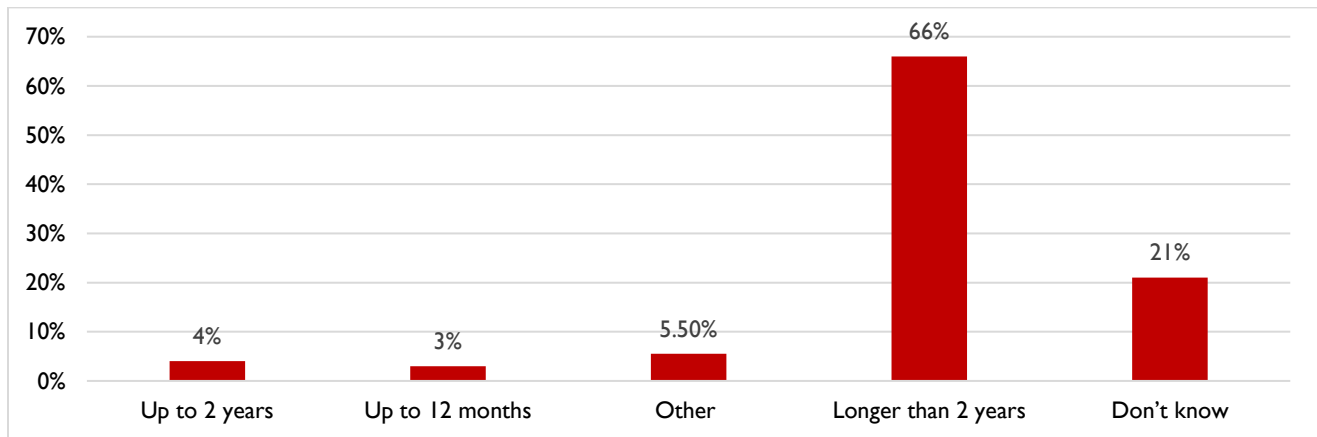
1. Autistic Spectrum Condition
2. Speech, Language and Communication Needs
3. Social, Emotional and Mental Health Needs

Sustainability in the immediate future

All childcare providers were invited to state **how long they expected to stay in business for** – i.e., operating and supporting local families.

Majority of the responding early years childcare providers/settings **stated 2 years and over**.

Figure 19: Incidence of responding registered childminders stating they envisaged to remain in business



Majority of the responding out of school childcare providers **stated 2 years and over**.

Finally, early years childcare providers/settings, registered childminders and out of school childcare providers were invited to state what types of general support and advice they would welcome from Royal Greenwich over the forthcoming twelve months.

Figure 20: (Incidence of) types of support welcomed by responding childcare providers

Potential type of support	Percentage of early years childcare providers/settings stating they would welcome such (continued) support from the LA	Percentage of registered childminders providers/settings stating they would welcome such (continued) support from the LA	Percentage of out of school childcare providers/settings stating they would welcome such (continued) support from the LA
Marketing support/advice	25%	21%	31%
Business support/advice	15%	28%	12.5%
Ideally, advice on buildings and resources	19%	22%	9.5%

Inspection/registration support/advice	18.5%	29%	9.5%
Support to network with other providers	24.5%	35%	37.5%
Advice/support on needs of children with additional learning needs	38%	47%	40%
Advice/support on providing childcare for children with complex medical needs	34%	41%	0
Caring for and understanding needs of babies and 2-year-olds	23%	0	0
Small grant contribution for capital works – e.g. outdoor classroom/kitchen	0	0	31%
Staff training around child /young people development needs	0	0	33%

Early years childcare providers/settings were invited to feedback any other themes/subjects which they would welcome Royal Greenwich continuing to have an awareness of, with *repeated* such themes/subjects being:

- (Continued) information to support the promotion of Tax-Free Childcare
- (The convenience for certain setting staff of) weekday evening facilitated training sessions
- A need for a continued awareness of recruitment challenges.

Registered childminders were invited to feedback any other themes/subjects which they would welcome Royal Greenwich continuing to have an awareness, with *repeated* such themes/subjects being:

- To continue to be a listening ear about funded childcare hourly rates
- To continue to provide support to Good and Outstanding Ofsted rated settings, to help them maintain their standard.

Out of school childcare providers were invited to feedback any other themes/subjects which they would welcome Royal Greenwich continuing to have an awareness, with *repeated* such themes/subjects being:

- Continued support with identifying suitable premises – as required
- Continued support with sources of revenue-focused small grants.

Funded Early Education

Introduction to funded early education

Some children aged 2-4 years 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.
- From 1 April 2024, significant changes to early learning entitlements are being expanded in phases. By September 2025, most working families with children under the age of 5 will be entitled to 30 hours of childcare support. The changes are being introduced gradually to make sure that providers can meet the needs of more families. This means that:

- From April 2024, eligible working parents of 2-year-olds will be able to access 15 hours childcare support
- From September 2024, 15 hours childcare support will be extended to eligible working parents of children from the age of 9 months to 4-year-olds
- From September 2025, eligible working parents of children under the age of 5 will be entitled to 30 hours of childcare a week.

Take up of funded early education places Autumn 2023

Figure 21: Take up of funded places in Autumn term 2023 in the Royal Borough of Greenwich

Funded take up	2-year-old	3- & 4-year-old Universal Only	3- & 4-year-old Universal & Extended	Grand Total
Childminder	29	28	73	130
Maintained Nursery	132	199	115	446
PVI	539	988	705	2232
School	15	1082	364	1461
Grand Total	715	2297	1257	4269

Figure 21 indicates that:

- 72% of those who were eligible took up 2-year-old funded provision in Autumn 2023
- 91% of 3-year-olds and 84% of 4-year-olds of those who were eligible took up funded universal provision and a reception place in Autumn 2023
- 55% of early years funded places are taken up in non-maintained provision and this is likely to increase with the expansions of entitlements.

Figure 22: Incidence of Royal Borough of Greenwich providers delivering funded early education places

Type of Early Years Childcare Provision	Number of providers delivering funded early years childcare places (Autumn 2023)
Childminders	80
Nursery classes in schools	54
Maintained nursery schools	4
Private, voluntary & independent nurseries	113
Total	251

Feedback on the theme of funded early years education received in Autumn 2023

In terms of those early years childcare providers/settings that engaged with the structured interviews/Autumn 2023 survey:

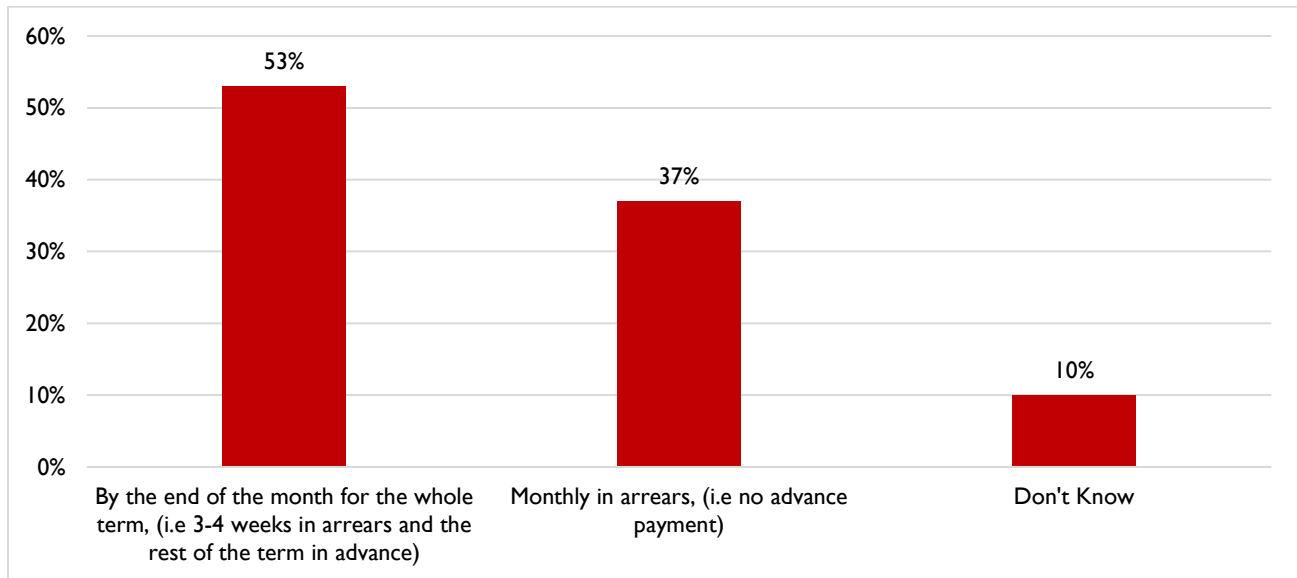
- 73% stated that they provided funded entitlement for 2-year-olds places in September 2023, with the average number of such places being 12.
- 58% of relevant providers stated that they currently had vacant funded entitlement for 2-year-olds places – at an average of 6 places/relevant setting.
- 91% stated that they provided universal 15 hours funded entitlement for 3- and 4-year-olds places in September 2023, with the average number of such places being 19. 61% of relevant providers stated that they currently had vacant universal 15 hours funded entitlement for 3- and 4-year-olds places – at an average of 6 places/relevant setting.
- 86% stated that they provided 30 hours childcare offer places in September 2023, with the average number of such places being 13.
- 52% of relevant providers stated that they currently had vacant 30 hours childcare offer places – at an average of 5 places/relevant setting.

In terms of those registered childminders that engaged with the structured interviews/Autumn 2023 survey:

- 63% of registered childminders stated that they provided funded entitlement for 2-year-olds places in September 2023
- 34% relevant registered childminders stated that they currently had vacant funded entitlement for 2-year-olds places
- 71% of registered childminders provided universal 15 hours funded entitlement for 3- and 4-year-olds places in September 2023. 41% relevant registered childminders stated that they currently had vacant universal 15 hours funded entitlement for 3- and 4-year-olds places.
- Finally, 69% of registered childminders stated that they provided 30 hours childcare offer places in September 2023.
- 32% of registered childminders stated that they currently had vacant 30 hours childcare offer places.

Registered childminders also outlined what they considered to be their preferred method of payment.

Figure 23: Childminders aggregated feedback on their preferred method(s) of payment



Early years childcare providers/settings were requested to say whether any parents/carers had started contacting them about the government’s proposed changes to the 15 hours funded entitlements.

48% of early years childcare providers/settings and (similarly) 29% of registered childminders stated that they had. The most frequent type of enquiry had been (words to the effect): “When will it start?” – followed in frequency by (words to the effect): “Are you going to offer extended places starting in April?” – and for childminders, a question: “is this going to be free?”. It was also observed how a recurrent number of early years childcare providers/settings outlined (words to the effect) how “there had been an increased incidence of enquiries about funded places from expectant parents”.

Early years childcare providers/settings and registered childminders were requested to say whether any parents/carers had started contacting them about the government’s proposed changes to the 30 hours childcare offer.

18.5% responding of early years childcare providers/settings and 7% of responding registered childminders stated that they had. The most frequent type of enquiry had been (words to the effect): “they have asked about eligibility” – followed in frequency by (words to the effect): “they have asked: when will it start?”.

The most frequent type of enquiry that had been made to registered childminders was (words to the effect): “how will the new funding work?”

Early years childcare providers/settings and registered childminders were invited to answer the question: *Considering the government announcement, how much higher do you expect demand for funded/free entitlement places to be at your setting, over the next two years?*

Figure 24: Early years childcare providers/setting: assessment of demand aligned to the Government’s announcements on the extensions to the funded entitlements

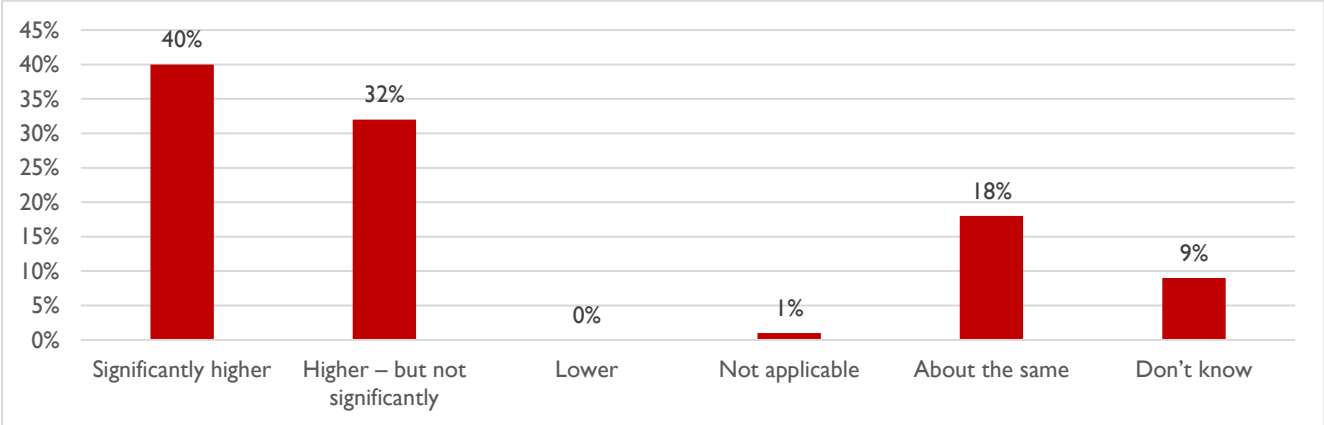
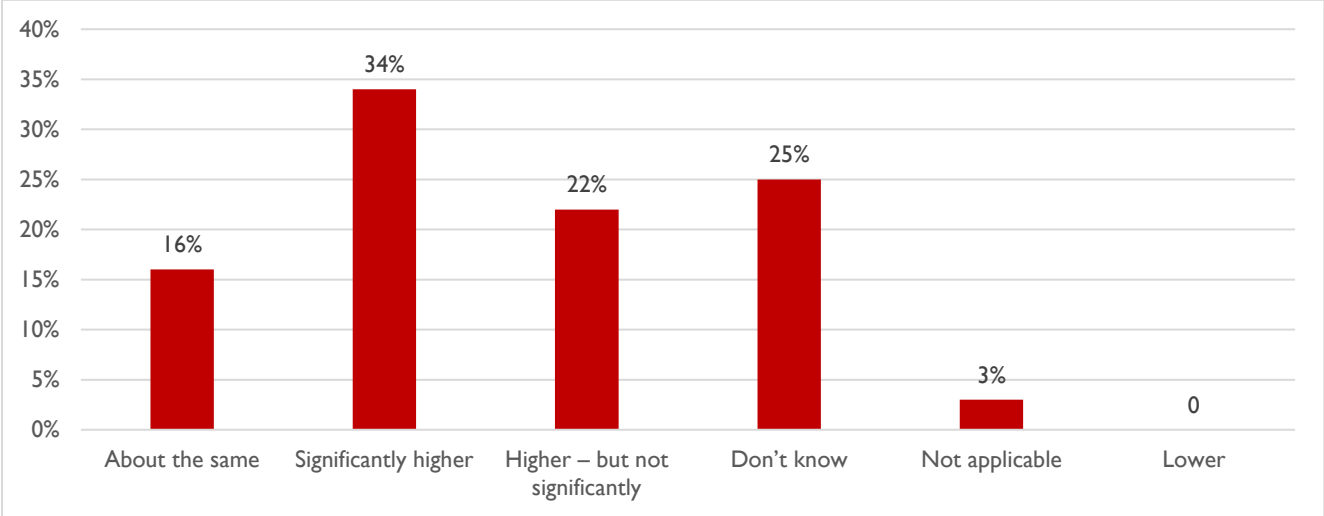
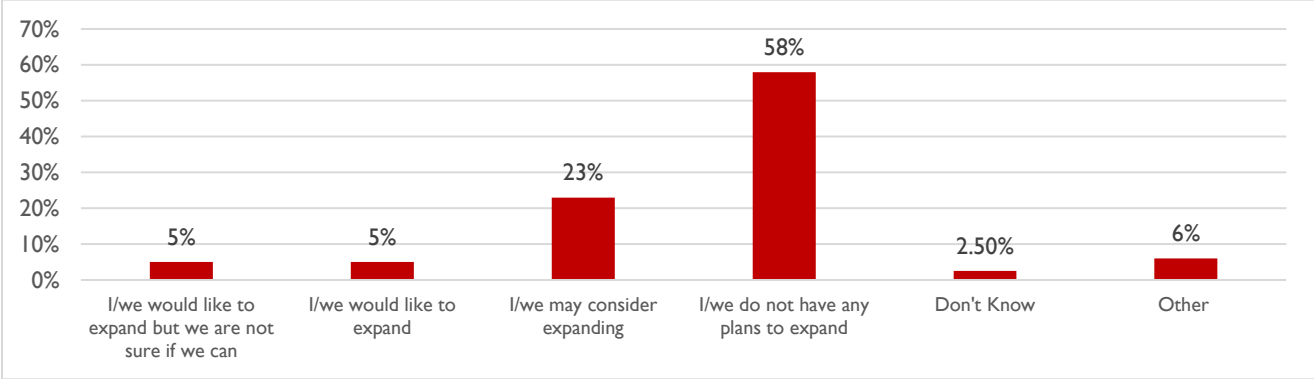


Figure 25: Registered childminders: assessment of demand aligned to the Government’s announcements on the extensions to the funded entitlements



Early years childcare providers/settings and registered childminders outlined any incidence of plans to expand the capacity at their setting, to meet any future potential increased demand.

Figure 26: Early years childcare providers/setting: Incidence of plans to expand the capacity at early years childcare providers/settings, to meet any future potential increased demand

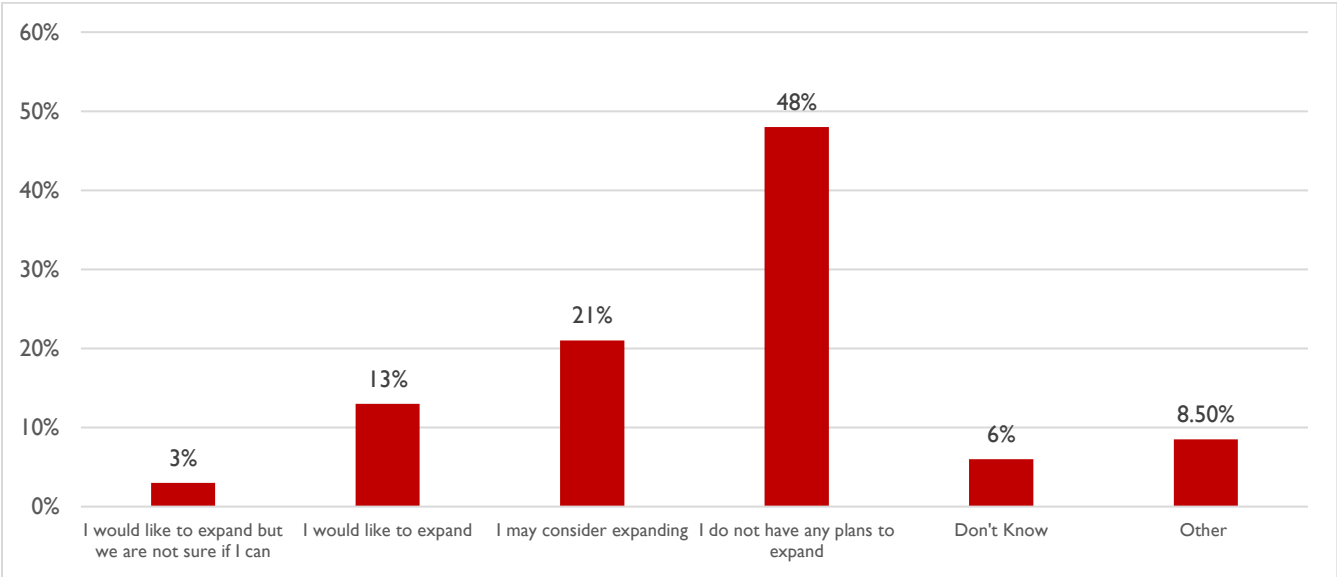


Indeed, those providers that did have plans to expand their setting, were invited to state how they believed the local authority could best support such an ambition.

The most frequent response was (words to the effect): “the local authority could help us plan how to most effectively use our space”.

The second most frequent response was (words to the effect): “the local authority could help us with a [empty] ‘buildings/property search”.

Figure 27: Registered childminders: Incidence of plans to expand the capacity at early years childcare providers/settings, to meet any future potential increased demand



Early years childcare providers/settings and registered childminders were invited to confirm whether they had any concerns about the implementation of the three extensions to the funded entitlements.

Figure 28: Early years childcare providers/settings: Incidence of specific concerns about the initiation of the extensions to the funded entitlements

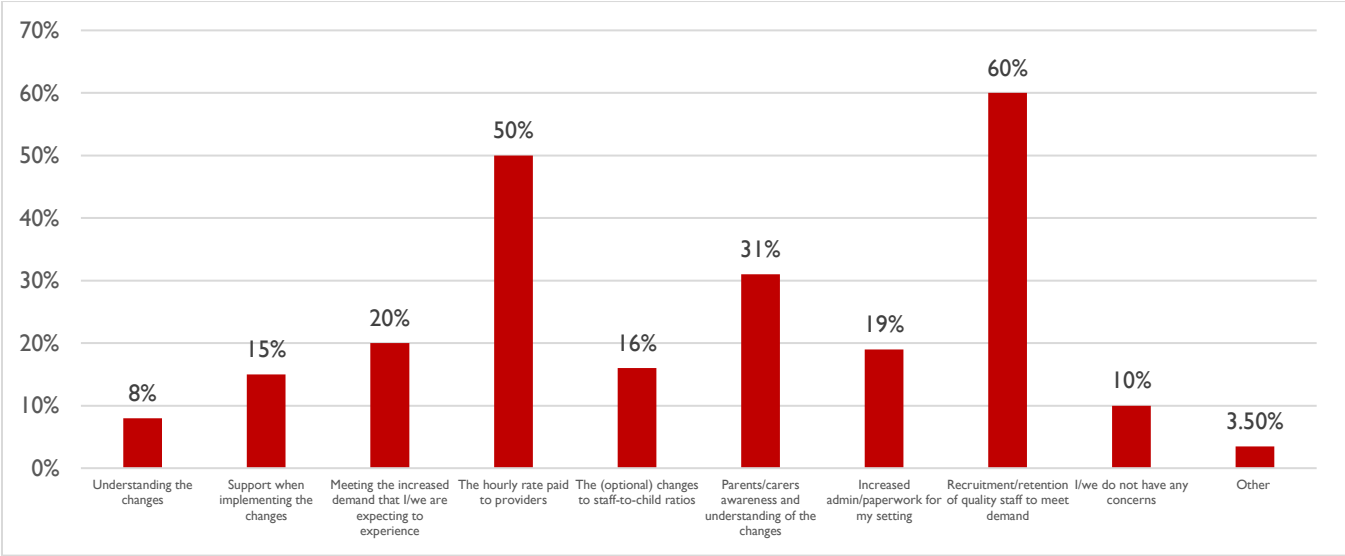
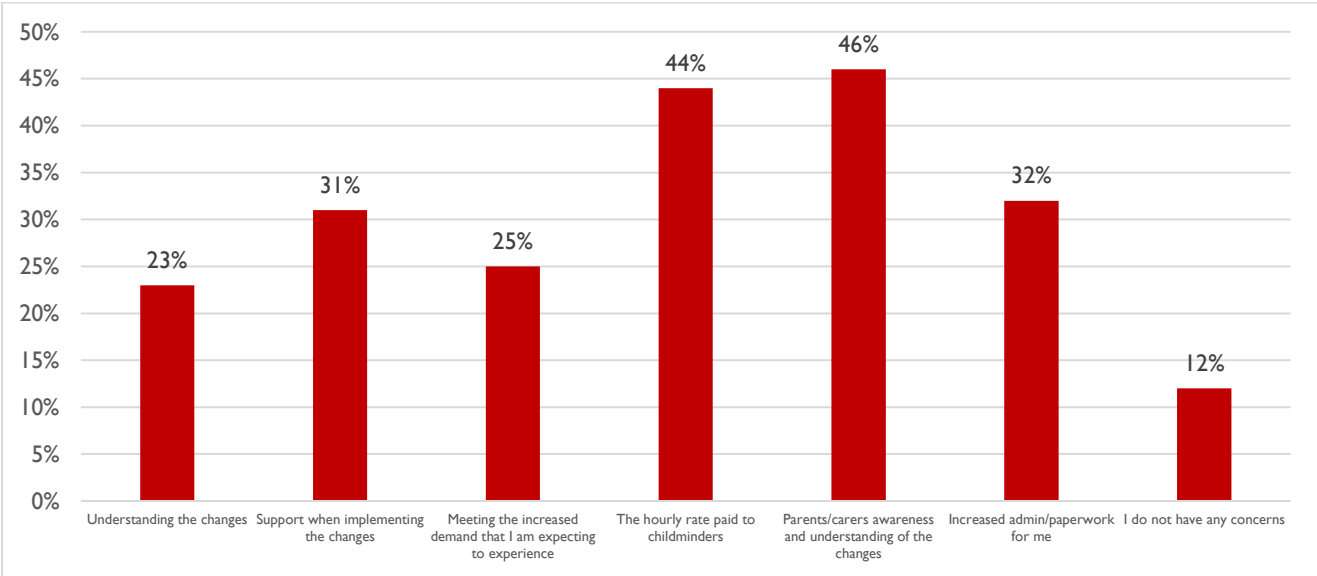
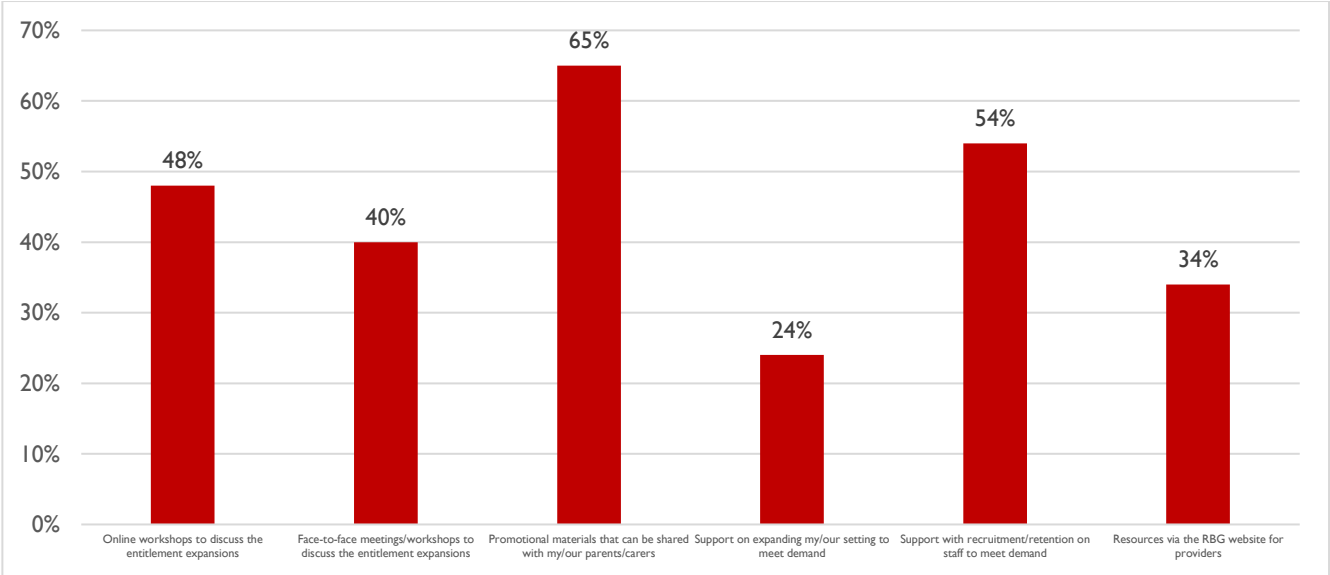


Figure 29: Registered childminders: Incidence of specific concerns about the initiation of the extensions to the funded entitlements



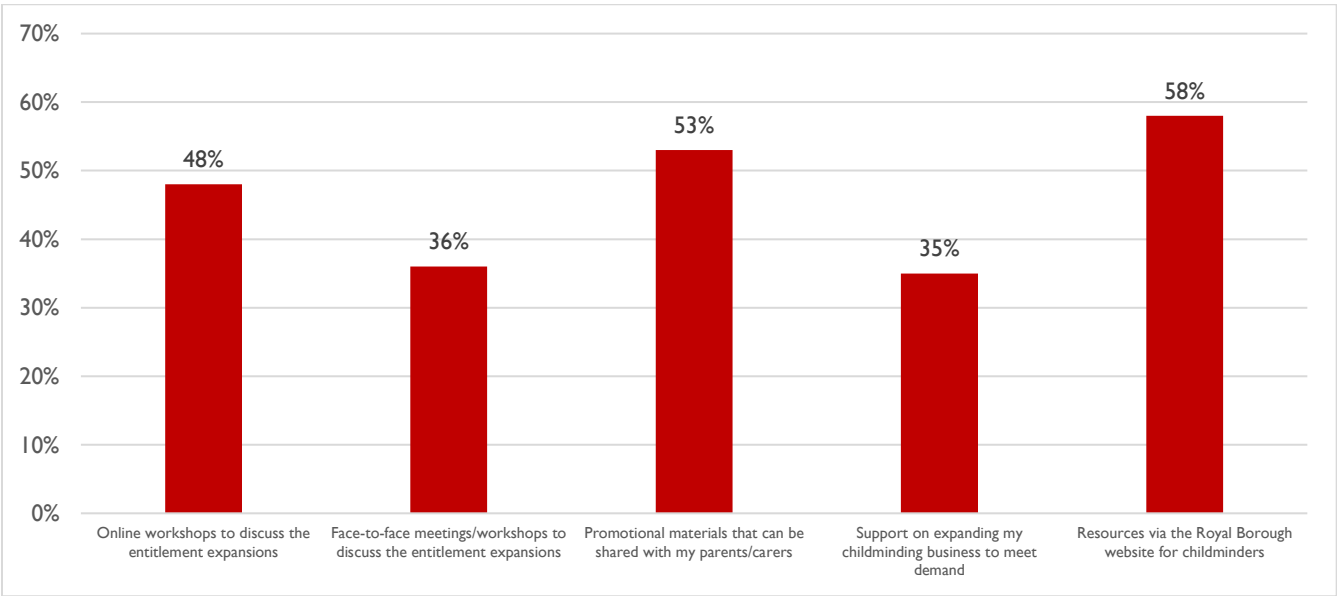
Early years childcare providers/settings were invited to state how they believed the Royal Borough could best support them with implementing the extended entitlements.

Figure 30: Frequency with which providers/settings stated they would welcome specific types of support



Registered childminders were also invited to state how they believed the Royal Borough could best support them with implementing the extended entitlements.

Figure 31: Frequency with which registered childminders stated they would welcome specific types of support



Finally, all early years childcare providers/settings were requested to state whether they promoted the existence of Tax Free Childcare. 82% stated that they did. In comparison, the same percentage: 82% of registered childminders stated that they promoted the existence of Tax-Free Childcare – and 88% of out of school childcare providers stated that they promoted the existence of Tax-Free Childcare.

Fees and Pricing

Figures 32, 33 and 34 below shows the average standard hourly fees applicable for each type of childcare provision for specific key age groups, **for fee paying places** – as confirmed by childcare providers in Autumn 2023.

Figure 32 - Average standard hourly and daily fees per age group stated by responding 0-4 years formal childcare providers in Autumn 2023

Type of Provision	Aged 0 – 12 months	Aged 1 year	Aged 2 years	Aged 3 years	Aged 4 years
Hourly fees stated by respondents					
Early Years Childcare Providers/Settings	£8.26	£8.26	£7.59	£6.42	£6.42
Registered Childminders	£7.58	£7.39	£7.09	£7.05	£6.88
Daily fees stated by respondents					
Early Years Childcare Providers/Settings	£77.97	£78.87	£74.78	£69.98	£70.53
Registered Childminders	£61.68	£60.93	£60.44	£60.29	£60.29

It should be noted that there may be variations to fees based on the number of hours a family uses, with reductions for longer hours, or discounts for sibling groups. There may also be additional payments for additional services, e.g., lunch/other meals which are not included in the price per hour.

Figure 33: Average daily 0-4 years fees aligned to broad planning area

Type of Provision	Aged 0 – 12 months	Aged 1 year	Aged 2 years	Aged 3 years	Aged 4 years			
Early Years Childcare Providers/Settings - daily								
East	£69.95	£69.95	£66.57	£60.50	£60.50			
Central	£70.90	£70.90	£69.90	£65.63	£65.63			
South	£80.50	£79.84	£73.63	£72.06	£72.08			
West	£87.78	£87.78	£82.40	£74.10	£76.05			
Registered Childminders - daily								
Type of Provision	Aged 0 – 12 months	Aged 1 year	Aged 2 years	Aged 3 years	Aged 4 years	Aged 5-8 years	Aged 9-13 years	Aged 14 years and over
East	£58.86	£59.79	£58.95	£58.95	£58.95	£45.00	£50.83	n/a
Central	£62.12	£62.43	£58.16	£61.63	£55.85	£43.45	£43.63	n/a
South	£62.94	£62.90	£62.90	£62.32	£61.80	£42.83	£52.10	£44.00
West	£60.75	£60.75	£60.75	£60.75	£67.50	£47.50	£47.50	n/a
After School Clubs – sessional								
Sessional Fees	Aged 0 – 4 years	Aged 5-7 years	Aged 8-11 years	Aged 12-14 years	Aged 15 years and over			
East	n/a	£27.50	£27.50	n/a	n/a			
Central	£12.25	£13.66	£14.25	£14.25	£31.33			
South	n/a	£12.37	£13.50	n/a	n/a			
West	£11.33	£12.83	£12.83	n/a	n/a			

Figure 34 - Average standard hourly fees for 5-18 years cohort stated by registered childminders in Autumn 2023

Type of Provision	Aged 5-8 years	Aged 9-13 years	Aged 14-18 years
Hourly fees stated by respondents			
Registered Childminders	£7.25	£7.48	£7.61
Daily fees stated by respondents			
Registered Childminders	£45.90	£49.30	£46.57

Figure 35 - Average standard hourly fees stated by 5-18 years formal out of school childcare providers in Autumn 2023

Type of Provision	Aged 0-4 years	Aged 5-7 years	Aged 8-11 years	Aged 12-14 years	Aged 15-18 years
Hourly fees stated by respondents					
Out of School Childcare Providers	£9.66	£11.45	£11.30	£14.00	£13.75
Sessional fees stated by respondents					
Out of School Childcare Providers	£11.70	£15.11	£15.70	n/a	n/a

Prices of early years childcare

- Early years 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 - ratio for 2-year-olds changed in September 2023 to 1:5)
- On average, childminding prices remain lower than PVI nurseries for 0–2-year-olds
- Prices of childcare accessible at early years childcare providers for babies and infants under 2 in the Royal Borough of Greenwich are slightly higher than the average for outer London boroughs – when applying the Coram Family and Childcare 2023 national childcare survey as a source
- For children aged over 2 years, childminding places are higher than the London average and groupcare is in line the London average
- Prices have (due to inflation and business modelling) increased in Greenwich in the last year but remain in line with London.

Summary of Childcare Providers feedback

The majority of providers who responded to the survey report that demand continues to stabilise and increased between Autumn 2022 and Spring/Summer 2023, including in response to the forthcoming advent of the extended funded entitlements in April 2024.

Private, voluntary and independent providers and childminders for 0–4-year-olds indicated that there continues to be sufficiency of provision in the childcare sector with 1,364 vacancies and 1,224 on waiting lists.

All relevant providers reported that they were currently able to meet demand for 2-year-old, 15 hours universal entitlement and 30 hours extended entitlement.

- Early years childcare providers/settings are expecting an increase in demand for 2-year-olds places, aligned to the advent of the extension to the funded entitlement for 2-year-olds in April 2024
- In preparation for the advent of the extension to the funded entitlements, early years childcare providers/settings have stated that a priority to support them is the delivery of accurate and ongoing information to parents about eligibility and when (the term) that they are able to start accessing an entitlement.
- Recruitment is a more pronounced issue/challenge for all types of childcare providers, than retention – in particular, the ability to attract Level 3 Qualified staff and also responses to job adverts
- There is encouragement about the overall sustainability of the early years childcare sector and the out of school childcare sector, with only four respondents stating that they believed that they may not be operating by autumn term 2025
- There was a relatively high level of confidence in providing childcare support for children with SEND within the early years childcare sector and the out of school childcare sector – however, there was a notable incidence of childminders believing that they still would benefit from such relevant training and less evidence of them having SEND-themed qualifications

Recommendations

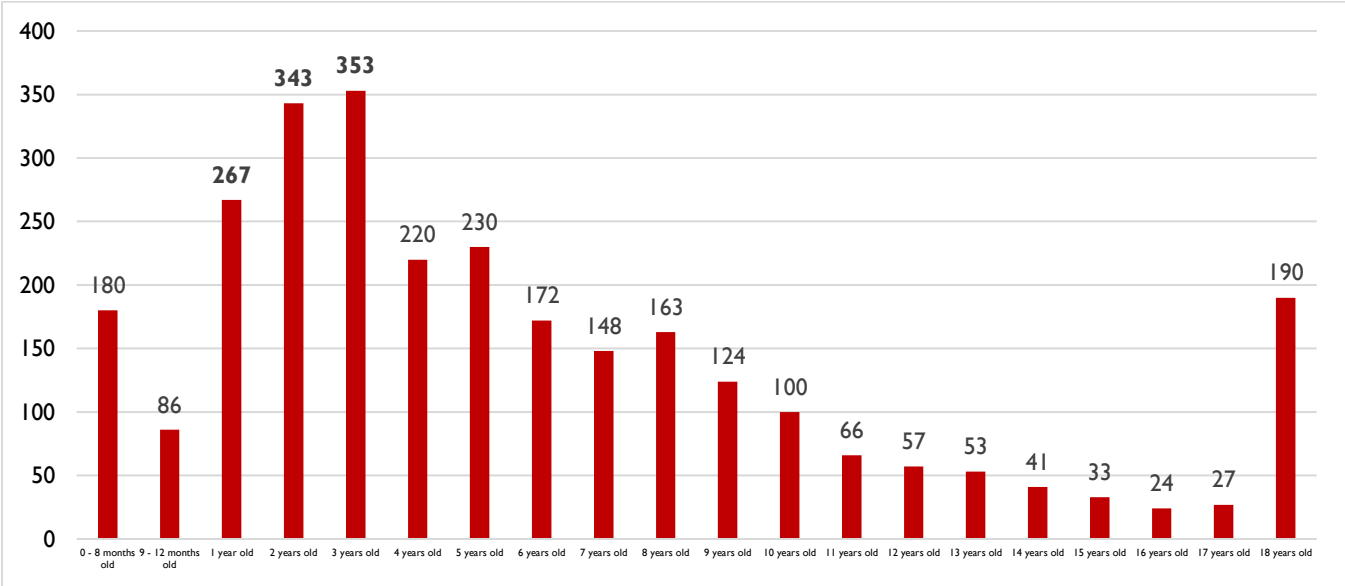
- Royal Greenwich will continue to focus on clear messaging with regard to eligibility to the forthcoming expanded funded entitlements – aligned to the fact that early years childcare providers are receiving enquiries from parents which demonstrate a lack of understanding in the eligibility criteria and its fundamentals
- Royal Greenwich will continue to support its childcare sector with accessing revenue and capital grant funding, business modelling and marketing – in particular to support those settings which wish to increase their capacity for 2-year-olds
- Royal Greenwich is strategically aware of the fact that the early years childcare sector, in particular, continues to experience pronounced challenges with recruiting quality and qualified staff – particularly those with Level 3 qualifications
- As with all London Boroughs, the incidence of children and young people with SEND and EHCPs continues to increase. Royal Greenwich will continue to therefore prioritise the organisation of and the promotion of relevant courses and qualifications
- Royal Greenwich will continue to systematically and strategically support childcare providers to network with their peers – a progression which will continue to support the (most) effective accessibility to formal childcare for children and young people with SEND.

Feedback from Parents

In Autumn 2023 a structured online survey was promoted to parents, carers and guardian who are resident throughout Royal Greenwich. This promotion took place through early years and childcare providers including schools, Council’s residents bulletin, social media channels, and Children’s Centres. A total of 1,750 parents, carers and guardians responded to the survey (valid responses with postcodes included) and their key collective feedback is summarised below.

Incidence of parents having a child(ren) of specific ages

Figure 36: indicates the numbers of children of specific ages that were being raised by the responding parents



Each responding parents was raising an average of 1.85 children, with 33% of the respective children being aged 2-4 years.

As would be expected, the most frequent type of formal childcare that was being accessed by parents of 0–4-year-olds was a day nursery.

The most frequent type of formal childcare that being accessed by parents of children and young people aged over 5 years was an after-school club.

Incidence of parents using formal childcare

Figure 37: indicates the frequency with which children were using specific types of formal childcare, in Autumn 2023

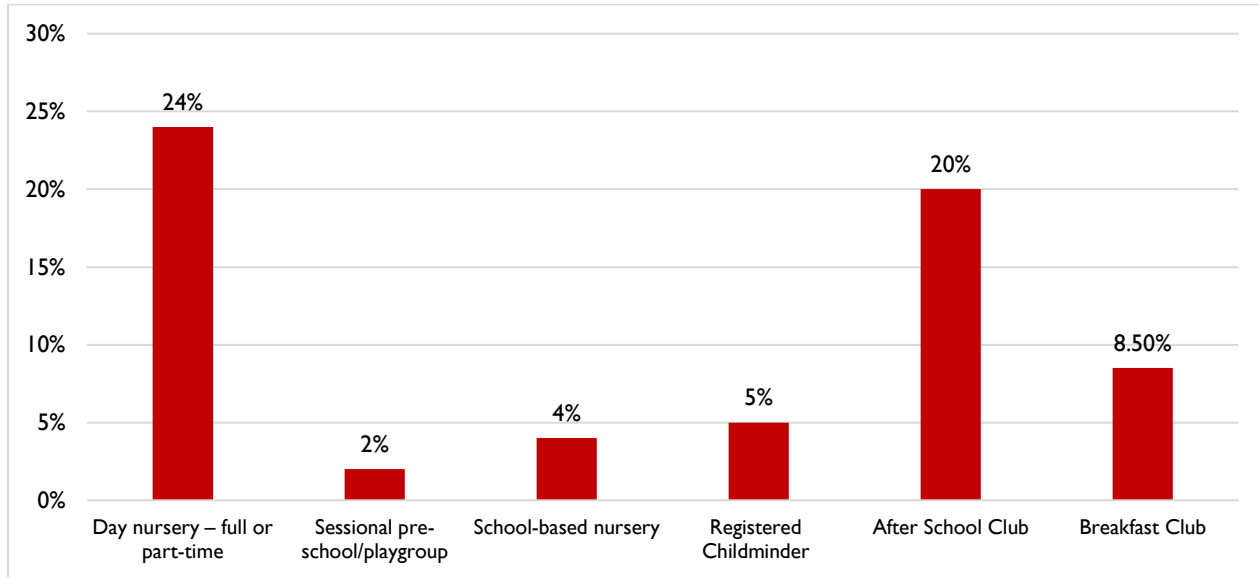


Figure 36 indicates that the three most frequent types of formal childcare being accessed were (in order of frequency):

1. Day Nursery (most frequently being accessed by 2-year-olds)
2. After School Club (most frequently being accessed by 5-year-olds)
3. Breakfast Club (most frequently being accessed by 6-year-olds)

Incidence of reasons why parents are not accessing formal childcare

Figure 38: indicates the frequency (number) with which responding parents stated reason(s) why they were not accessing formal childcare, in Autumn 2023

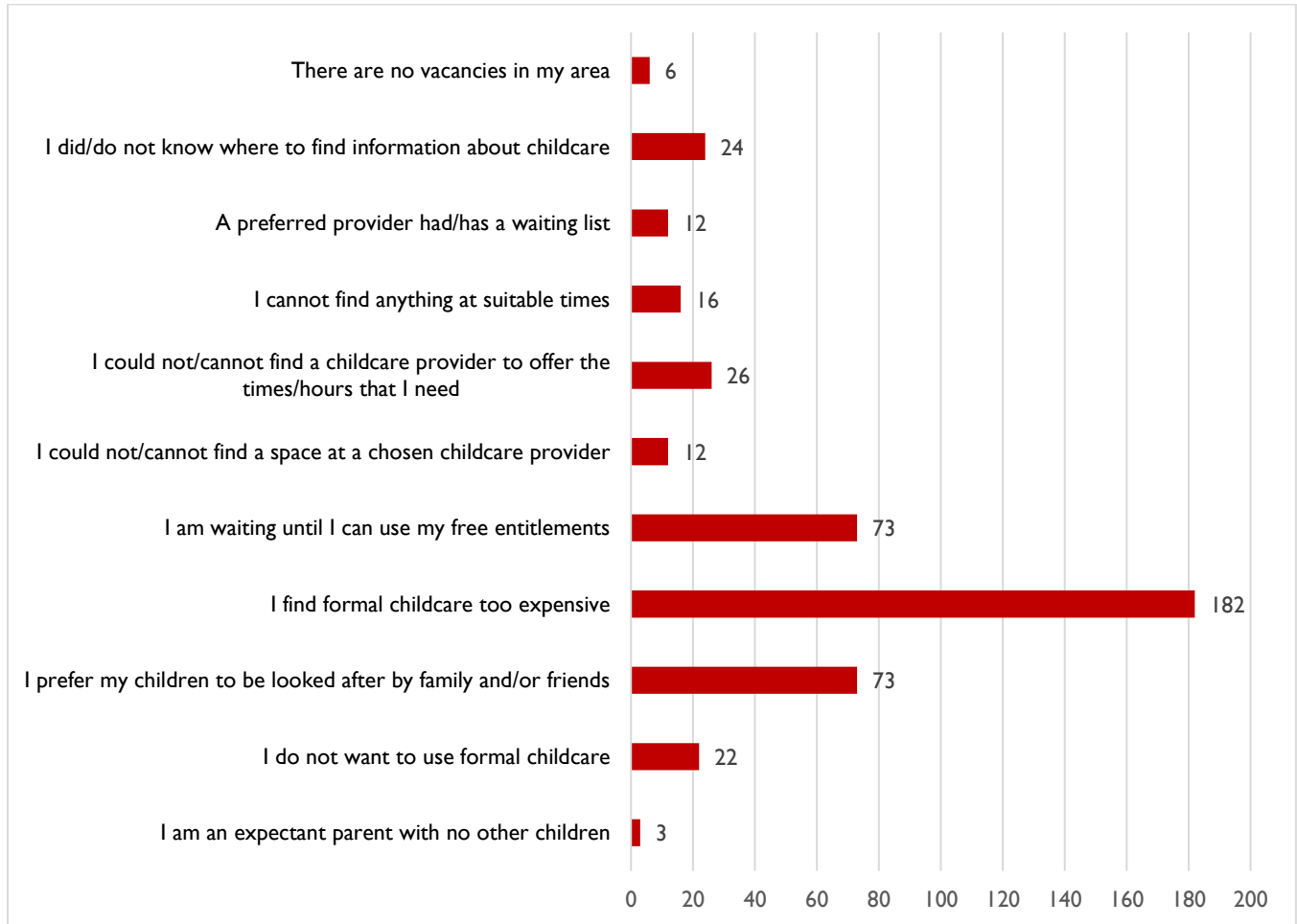


Figure 37 indicates that the three most frequent types of reasons – why responding parents and carers were evidently not accessing formal childcare - were (in order of frequency):

1. I find formal childcare too expensive
2. I am waiting until I can access my free entitlements
3. I prefer my children to be looked after by family and/or friends

Hours that childcare was being accessed by parents

Figure 39: indicates the most frequent range of hours that childcare was being accessed, aligned to each specific age cohort

Age Cohort	Most frequent number of hours/week that childcare was being accessed by relevant/responding families (other than 0)	Second most frequent number of hours/week that childcare was being accessed by relevant/responding families (other than 0)
0-12 months	Plus 30 hours a week	26 - 30 hours a week
1 year	Plus 30 hours a week	26 - 30 hours a week
2 years	Plus 30 hours a week	26 - 30 hours a week
3 years	Plus 30 hours a week	11 - 15 hours a week
4 years	Plus 30 hours a week	11 - 15 hours a week
5 years	1-5 hours a week	11 - 15 hours a week
6 years	1-5 hours a week	6 - 10 hours a week
7 years	1-5 hours a week	6 - 10 hours a week
8 years	1-5 hours a week	6 - 10 hours a week
9 years	1-5 hours a week	6 - 10 hours a week
10 years	1-5 hours a week	6 - 10 hours a week
11 years	1-5 hours a week	Plus 30 hours a week
12 years	1-5 hours a week	6 - 10 hours a week
13 years	1-5 hours a week	6 - 10 hours a week
14 years	1-5 hours a week	6 - 10 hours a week

The most frequent number of weekly hours (of 1 and above) that childcare was being accessed across all age cohorts was: Plus 30 hours a week, followed in frequency by: 1-5 hours a week (which was predominantly stated by parents with school-aged children).

39% of parents stated that they would like to *increase* the hours that they accessed childcare over the next 3 years, up to 2027 and relevant parents were invited to state how many hours per week they may like to increase their usage of formal childcare by?

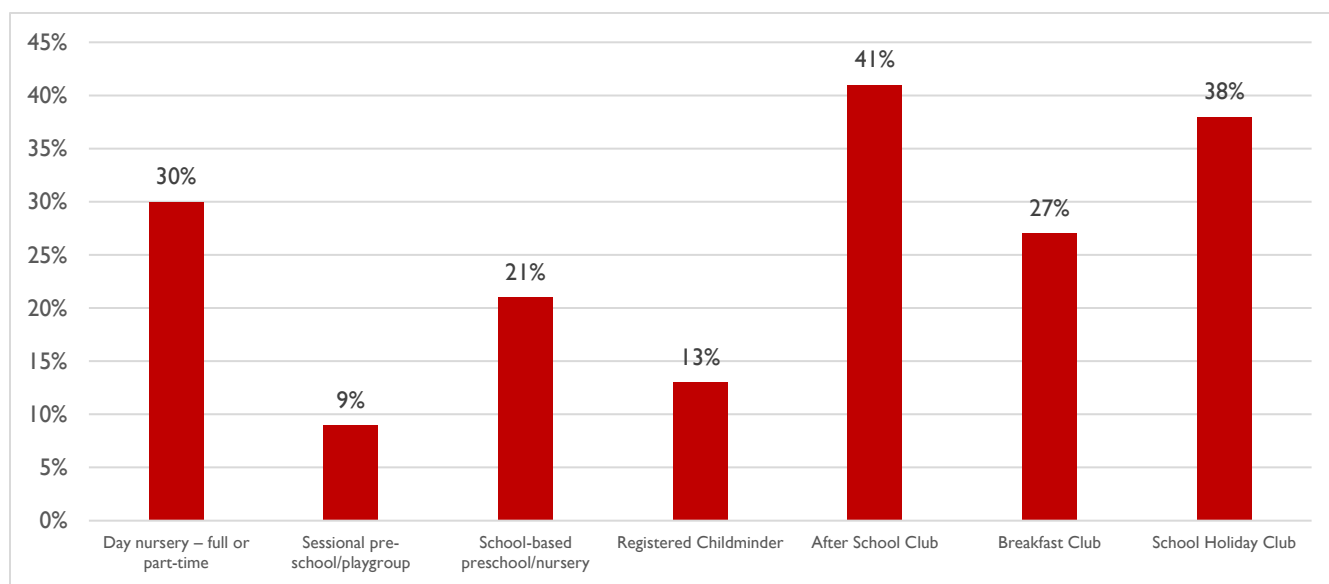
Figure 40: average number of hours/week that responding parents stated they would like to possibly increase their usage of formal childcare too, aligned to each age cohort

Age Cohort	Average number of hours/weeks that was most frequently stated by relevant parents
0-12 months	30-40 hours
1 year	30-40 hours
2 years	30-40 hours
3 years	30-40 hours
4 years	1-10 hours
5 years – 14 years	1-10 hours

The three age cohorts which accounted for highest average number of hours which responding parents would like to increase their usage of childcare by were (the successive ones of): 1 year, 2 years and 3 years.

Types of formal childcare that responding parents would like to access in the future – which they were not accessing/using in Autumn 2023

Figure 41: indicates the frequency with which all parents stated that they would like to access a type of formal childcare, which they were not accessing in Autumn 2023



Funded Childcare Entitlements

Funded entitlement for 2-year-olds

22% of responding parents stated that they had a two-year-old child. Of these relevant parents:

15% of these parents stated that they were accessing the free entitlement for 2-year-olds, in Autumn 2023.

11.5% stated that they had not heard of its existence.

49% stated that they had heard of its existence but were not accessing it.

14% stated that they heard of its existence and would like to start using it.

(11.5% of relevant parents provided no clarification response, aligned to the funded entitlement for 2-year-olds).

Universal 15 hours funded entitlement for 3- and 4-year-olds

33% of responding parents stated that they had a three-year-old child and/or a four-year-old child. Of these relevant parents:

47.5% stated that they were accessing the 15 hours universal free entitlement for 3- and 4-year-olds, in Autumn 2023.

4.5% stated that they had not heard of its existence.

25% stated that they that had heard of its existence but were not accessing it.

6% stated that they heard of its existence and would like to start using it.

(17% of relevant parents provided no clarification response, aligned to the universal 15 hours funded entitlement for 3- and 4-year-olds).

30 hours childcare offer

(As above) 33% of responding parents stated that they had a three-year-old child and/or a four-year-old child. Of these relevant parents:

32% stated that they were accessing the 30 hours childcare for working families, in Autumn 2023.

5.5% stated that they had not heard of its existence.

38% stated that they that had heard of its existence but were not accessing it.

13% stated that they heard of its existence and would like to start using it.

(11.5% of relevant parents provided no clarification response, aligned to the universal 15 hours funded entitlement for 3- and 4-year-olds).

Changes to the funded childcare entitlements – being introduced in April 2024

Parents were notified about the forthcoming advent of the extended funded entitlements, which will roll out over the next two years as follows:

- From **April 2024**, working parents of two-year-olds will be able to access 15 hours of free early learning and childcare (from the term after they turn 2)
- From **September 2024**, 15 hours of free early learning and childcare will be extended to all children from the age of nine months (from the term after they turn 9 months)
- From **September 2025**, working parents of children under the age of five will be entitled to 30 hours free early learning and childcare per week

Figure 42 - demonstrates how parents and carers of children aged 0-4 years old believed the extended funded entitlements would change their timelines for accessing formal (funded) childcare

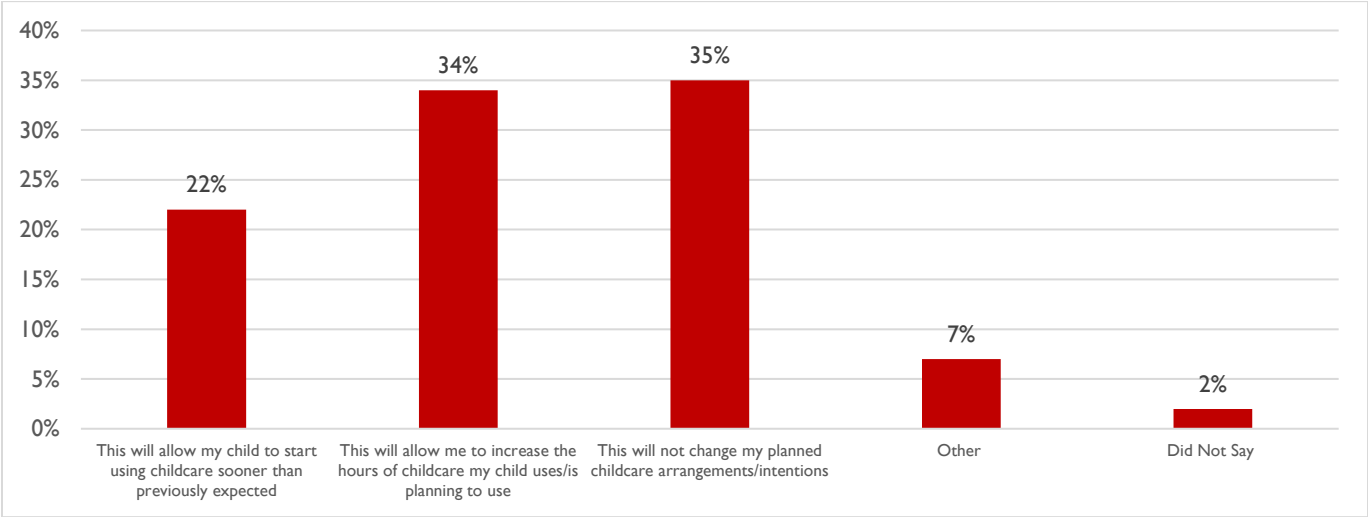
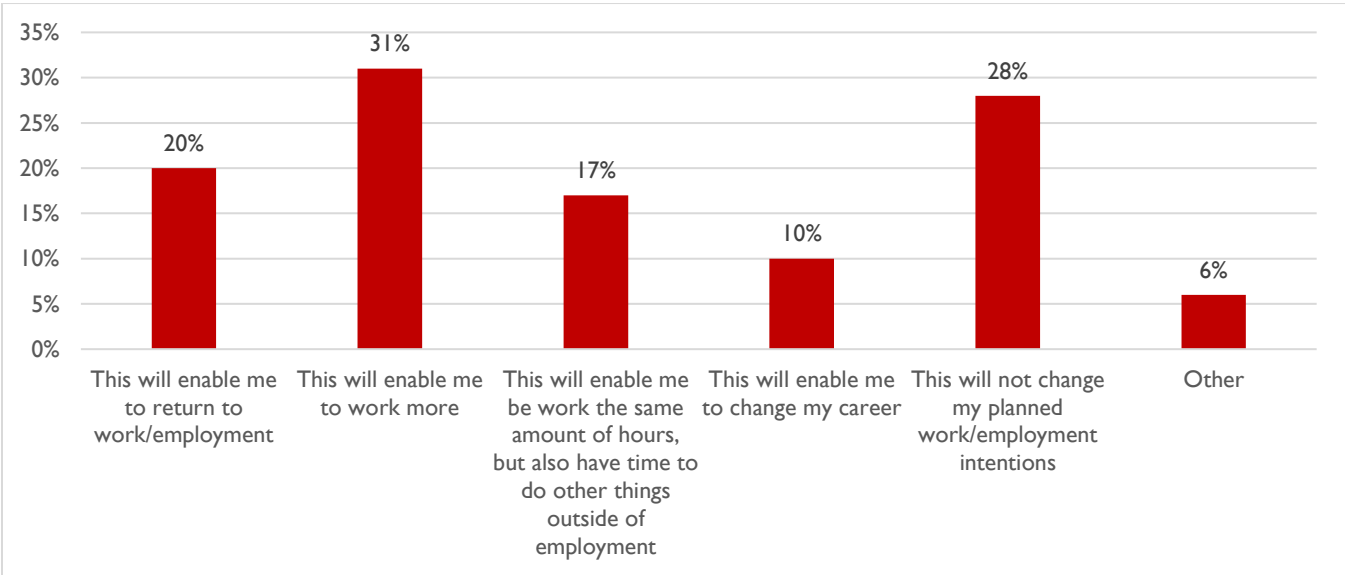


Figure 43 - demonstrates how parents and carers of children aged 0-4 years old believed the extended funded entitlements would influence their intentions about employment (note: parents were able to provide multiple responses)



Universal Credit and Tax-Free Childcare

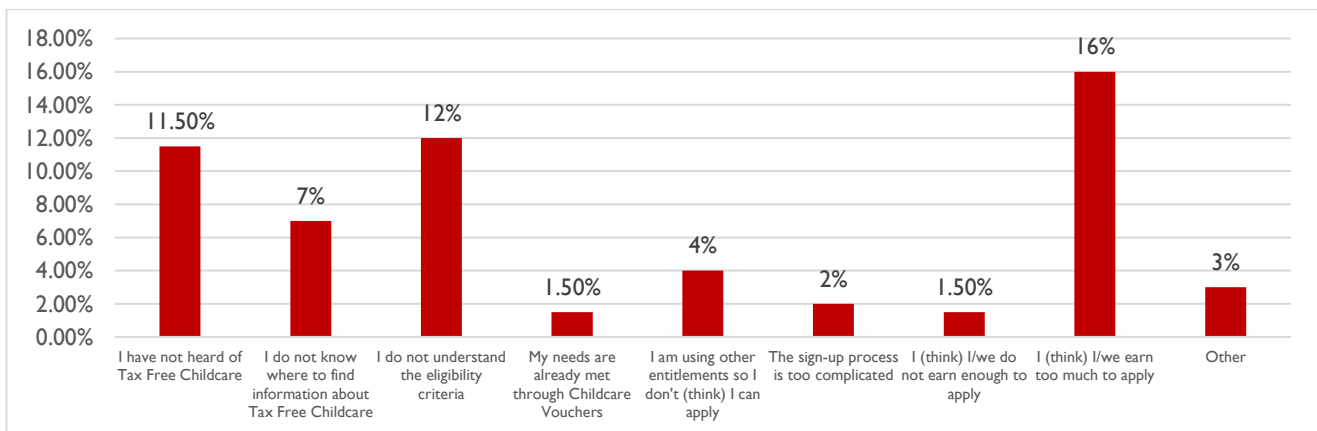
Responding parents/carers were invited to state whether - to the best of their knowledge - they were eligible for: (a) Universal Credit and (b) Tax Free Childcare:

Figure 44 - Responses aligned to (a) Universal Credit and (b) Tax Free Childcare

Age Cohort	Percentage of Parents/Carers who stated: Universal Credit	Percentage of Parents/Carers who stated: Tax Free Childcare
Yes, and I access	18%	23%
Yes, but I do not access	17.5%	5.5%
No, I am not eligible	50%	25%
Not sure	8%	24.5%
Did not say	6.5%	22%

Relevant parents/carers were then invited to state whether they had encountered any barriers when trying to access Tax Free Childcare:

Figure 45 - Incidence of (any) barriers encountered when seeking to access Tax Free Childcare (as stated by parents who responded to the relevant question)



Parents view - the role of the local authority

All parents and carers were invited to state whether they believed that there was anything that the Royal Borough should be further undertaking, in terms of supporting parents and carers with childcare, in late 2023.

The most frequent type of feedback was (words to the effect):




“Help develop more wraparound childcare provision”

The second most frequent type of feedback was (words to the effect):




“Provide support to help providers create more early years places”

The third most frequent type of feedback was (words to the effect):



“Help provide more information about funded childcare”

The fourth most frequent type of feedback was (words to the effect):



“Help develop more school holidays childcare”

The fifth most frequent type of feedback was (words to the effect):



“More wraparound places for children with SEND”

Summary of Parents feedback

- Of those who cite reasons for not accessing formal childcare - affordability was highlighted as the most frequent reason or barrier – by 12% of all responding parents
- (From a forthcoming demand perspective) South and Central were most frequently highlighted as locations where parents (including those who were not accessing formal childcare in Autumn 2023) would like to access types of formal childcare over the next 3 years
- 56% of parents of 0–4-year-olds stated that the extensions to the funded entitlements which is due to launch in spring 2024 will mean that they: (a) can return to work sooner than they planned and/or (b) can possibly work for a higher number of hours than they are at present.
- A day nursery was the type of formal childcare that was most frequently accessed by responding parents, with parents of 2 year olds accessing this type of childcare with the highest frequency, in comparison to other pre-school age groups – indicating that the advent of the extended funded entitlement for 2 year olds in April 2024, could lead to an additional demand, on top of an already buoyant demand/occupancy levels for that age cohort.

Recommendations

- Royal Greenwich will continue to work in partnership with its early years childcare provider to convey accurate and timely updates about eligibility for the forthcoming expanded funded entitlements – in particular aligned to timing and accessibility
- Royal Greenwich will continue to be mindful that affordability of formal childcare continues to act as the most frequent barrier to parents accessing this type of support, and therefore align their ongoing strategy to the opportunity that the extended funded entitlements will provide to certain families
- Royal Greenwich will retain a strategic awareness that childcare provision for 2-year-olds evidently remains a high priority for relevant young families in the borough – and that this will have a bearing accessibility when further demand impacts the sector in April 2024 as an outcome of the introduction of the 15 hours of free childcare to specific working families
- Royal Greenwich will consider how it can *continue to* attune its development capabilities aligned to geography, in particular with a focus on areas where parents/carers are signaling a notable future intention to access specific settings such as (in) the South area or where there are developments.

Feedback from Children

Children aged 2 - 4 in Early Years provision

23 different early years children from 6 different settings were asked about their nursery and their feedback is shared below.

What is the best thing about coming to nursery?

All of the children were very positive and eager to share their thoughts about the best things about their nursery. This ranged from favourite toys, play activities they enjoyed to liking their practitioners and eating fruit.

- Child aged 2 “Dinosaurs”
- Child aged 2 - “Dinosaurs, T-Rex”
- Child aged 2 - “Jumping”
- Child aged 2 - “Cuddles”
- Child aged 2 - “Singing”
- Child aged 2 - “slide, forest school”
- Child aged 2 – “I like drawing and pink... (pointing to top) mummy go shopping for pink”
- Child aged 3 - “Look Dinosaurs! Roar, I like these”
- Child aged 3 - “Butterflies”
- Child aged 3 - “I like to play music and dance, I have a new sister”
- Child aged 3 - “I like playdough, marbles and scooters”
- Child aged 3 - “I like my teachers”
- Child aged 3 - “I liked painting and rubbing the leaves”
- Child aged 3 - “climbing frame”
- Child aged 3 - “I like eating fruit”
- Child aged 4 - “I have a good time, we play friends, with toys everyday”
- Child aged 4 - “I draw on the floor with chalks look!”
- Child aged 4 - “Bicycles in the playground and my friends, and the rocket with the pump!”

Who do you play with at Nursery?

The importance of friendships with other children and adults in the nursery came through in children’s responses.

- Child aged 2 - “friends”
- Child aged 2 - showed by taking adult to home corner and started playing with the babies by feeding them and placing them in their cot
- Child aged 2 – “(Early years practitioner’s name)”
- Child aged 2 – “Dinosaurs”
- Child, aged 2 – “my brother”
- Child aged 3- “I play with these teddies”

- Child aged 3- “L is my best friend”
- Child aged 3 - “I play with my friends”
- Child aged 3 - “My friend A”
- Child aged 4 – “choose something new to play with”
- Child aged 4 - “We all play, boys and girls”

How do the grown-ups here help you?

This question was hard for some of the younger children to answer. The children thought about practical help from their practitioners but also recognised the emotional support they received.

- Child aged 2 - “plasters if hurt me”
- Child aged 2 - “forest school, happy”
- Child aged 2 - “Hug me”
- Child aged 2 - “I have family help”
- Child aged 2 – “My nose” (pointing to runny nose)
- Child aged 2 – “Cuddles together”
- Child aged 3 - “I have a bubble machine at home”
- Child aged 3 - “I got paw petrol”
- Child aged 3 - “sad, cuddle, mum comes after lunch”
- Child aged 3 - “Teacher gives me cuddles”
- Child aged 3 - “They help tidy at tidy up time”
- Child aged 3 - “collect worms and slugs outside”
- Child aged 3 - “keep me safe”
- Child aged 3 - “Wee wees on potty”
- Child aged 4 - “Help us when feeling sad, give us hugs”
- Child aged 4 - “Help collect the creepy crawlies”

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

This usually related to new or more toys, parents coming in or nothing at all!

- Child aged 2 – (pointed to a building block) “Broken, get new one”
- Child aged 3 - “Nothing”
- Child aged 3 - “Erm I don’t know, mummy come soon”

Imagine a friend was going to start at the nursery next week and were worried, how would you help them?

The children had good ideas about to welcome and settle new starters into their nursery and shared their own experiences and what helped them feel better about starting nursery – usually cuddles!

- Child aged 2 - “Mummy”, “strawberries”

- Child aged 2 – “(Teacher) my friends, my best friend”
- Child aged 2 - “You, you” (pointing to teacher)
- Child aged 2 - “High five”
- Child aged 3 - “Come inside don’t be scared”
- Child aged 3 - “Cuddles”
- Child aged 3 - “I don’t know, my friends cuddle me”
- Child aged 3 - “Give them a cuddle”
- Child aged 3 - “Girls are my friends, give them a cuddle”
- Child aged 4 – “Garden bikes, mud kitchen, scooters, diggers”
- Child aged 4 – “Play with toys, you feel better. I didn’t want to come here”

Children aged 4 - 10 in Out of School provision

26 different children from 5 different provisions (including both session where breakfast and after school club) were asked about their out of school provision and their feedback is shared below.

What is the best thing about coming to Breakfast / ASC?

All of the children were curious about why they were being asked about their provision and were very enthusiastic about discussing their out of school setting. They all shared their thoughts happily and most had very positive comments to make. Creative activities, playing outside, food choices and having friends were highly commented on by the children.

- Child aged 4 - “Playing dolls”
- Child aged 4 - “Playing outside”
- Child aged 5 - “Love the activities & I like the baby dolls”
- Child aged 7 – “seeing my friends”
- Child aged 8 - “Lovely activities”
- Child aged 8 – “Playing on the computer”
- Child aged 8 - “chill and play with my friends”
- Child aged 8 – “Colouring in. I can colour in from the colouring in book, but we have to photocopy them pages”
- Child aged 8 - “Get to play video games”
- Child aged 8 - “I got more friends here”
- Child aged 8 - “It’s really nice”
- Child aged 9 - “Playing with stuff, creative activities like poppies”
- Child aged 9 – “Friends and food, chicken curry rice and sandwiches oh and wraps”
- Child aged 9 – “Playing lego”
- Child aged 9 - “going outside to play football and Basketball, but we can’t a lot of the time as we have to stay in”
- Child aged 10 - “Basketball, cooking making cupcakes”

There are lots of children here, tell me about the friends you play with?

It was clear from the excitement of the children that new friendships across different year and peer groups was a positive experience for them.

- Child aged 6 - "A is my friend at breakfast and afterschool club"
- Child aged 7 - "I can chill with my different friends from other classes"
- Child aged 8 - "Some in my class and some are not"
- Child aged 8 - "My best friends, friends I can trust"
- Child aged 10 - "Some friends we play with are from my class, some are not, so we have different friends"

Imagine a friend was going to start at Breakfast / ASC next week and were worried, how would you reassure them?

The children were confident about how they would support a friend and demonstrated empathy by saying they would not need to worry about being a new starter. They noted all of the positives about the club such as still being at the school, food to eat, having fun and playing games. The older children particularly had lots of encouraging ways to reassure a friend.

- Child aged 4 - "Don't worry I'll be there nice; I'll take them around and hug them too"
- Child aged 5 - "Don't worry I'll look after you, hug them"
- Child aged 5 - "Food can be really good, really like the pizzas"
- Child aged 5 - "Not to worry, my friend came here, we are in the same class"
- Child aged 6 "I would help them and show them what to do"
- Child aged 7 "Don't worry if you are scared you can play with me, some people don't play with each other and that can be sad, I play with different friends in year 5 & 6 and reception"
- Child aged 7 - "Not to worry"
- Child aged 7 - "you can play, don't be afraid"
- Child aged 8 - "I would say to them its ok, fun and you can play, the best think is you don't have to learn"
- Child aged 8 - "It's the best thing in the world"
- Child aged 8 - "Really Fun"
- Child aged 9 - "Making friends, environment in school but fun stuff to do"
- Child aged 10 - "Games, tell them about this place"
- Child aged 10 - "Always have friends"
- Child aged 10 - "friends, be there for your friends"
- Child aged 10 - "Upstairs and downstairs, diversity day"

Some children might take longer to settle or need more help to do so, what is it like here for those children?

The children felt looked after and cared for by staff and felt they can speak to them confidently if they have a problem or a worry. If they felt sad, they talked about how kind staff when comforting and reassuring

- Child aged 4 - “the teacher sits with you and plays with you”
- Child aged 5 - “I knocked the beads over, we sort the beads to help stay calm, Miss says don’t worry about it”
- Child aged 6 - “I would be there for them, listen to them”
- Child aged 7 - “the teachers are kind and will sit with you and introduce you to new friends”
- Child aged 8 - “its ok at ASC, you can come and work here, leave your job”
- Child aged 9 - “the teachers help and ask us to make friends and play together”

How do the grown-ups here help you?

The children thought of situations where they needed help, either when they hurt themselves and how staff attended to them with care, when they need grown-ups to help them feel calmer or when they needed reminding about behaviour and being respectful to each other. The children had positive praise for staff but did observe that it can get loud when they all have to stay inside.

- Child aged 4 - “They play with me, we play police and robbers, and with B in the doll’s house”
- Child aged 4 - “They let me sit on the big chair”
- Child aged 5 - “The grown up tells us what to do but sometimes she is a bit bossy, I tell my mum I am the boss (laughs)”
- Child aged 6 - “Give us food, sandwiches, crisps, toast or a toastie, tiny bit though cos we might eat at home”
- Child aged 7 - “Get people to help if I have an injury”
- Child aged 7 - “If you get hurt, they put a plaster on it”
- Child aged 7 - “Help us if we get stuck, or help us if someone get hurt or if something has happened, they help by calming things down”
- Child aged 8 - “Always stuff to do, like drawing”
- Child aged 8 - “They are fun and play football with us”
- Child aged 8 - “They feed us, give us toast, crackers, wraps, noodles, grapes, cucumber, carrots, bananas”
- Child aged 8 - “Yes, they are nice here, it is loud here though sometimes, teachers have to shout to be heard”
- Child aged 9 - “We can talk about things”
- Child aged 9 - “Kind, make you feel good about anything, to not worry”
- Child aged 10 - “Get food for us, pasta, pizza, wraps, hoops and beans on toast and fruit”

What do you think the grown-ups need to know about working at the Breakfast / ASC?

Most children who wanted something to change said that they would like less noise and be outside more. Anonymous feedback has been shared with leaders in the out of school and they have created an action plan to meet children's concerns

- Child aged 7 - "It's a bit boring sometimes, and tight being inside"
- Child aged 7 - "Too noisy in here sometimes"
- Child aged 8 - "I just love the way it is here, I got extra house point for helping to tidy up"
- Child aged 8 - "They need to know about us... what we like to do, what makes us happy, yes I said I like legos and we have this to play with here"
- Child aged 9 - "Teachers voices are loud sometimes, to not be so strict"
- Child aged 10 - "Promises are made to go out and then broken"

What would make coming to Breakfast / ASC even better?

Most children had positive views saying it was perfect as it was and that they were encouraged to follow their own interests and develop their personal skills. Food was a big topic of discussion with children wanting more choice. Children wanted more creative activities with a mix of materials and more physical activities, especially being outside and being able to run around.

- Child aged 4 - "Food different sometimes"
- Child aged 4 - "Give some money to get some more toys and princess bunny"
- Child aged 6 - "I like it here, Miss M and Miss P are nice to us"
- Child aged 6 - "maybe trampolining or get outside more, or a bigger room"
- Child aged 7 - "Nothing"
- Child aged 7 - "I like Art and we have Art club on Mon, Tues, Thurs, our friends have to sign up if they want to join in"
- Child aged 8 - "It's perfect the way it is, we have Polish club, as I am Polish, and my friends want to learn my language, every Tues"
- Child aged 8 - "To be able to go on the big ship in the playground, I have to conquer my fear of it, no one is here now I could go on it"
- Child aged 8 - "Ice-cream"
- Child aged 8 - "when teacher says hands on top, we say that means stop!"
- Child aged 8 - "Food that is filling, some different variety of drinks, like juice sometimes, not just milk or water"
- Child aged 8 - "Creative pipe cleaners & paper to make flowers"
- Child aged 8 - "More colouring in books as the ones they have I already did"
- Child aged 9 - "Little kids get in the way when we are playing football"
- Child aged 10 - "Playing football we don't get to that much here"
- Child aged 10 - "To go outside everyday, or into the big halls in the primary school"

If you had to tell a friend about Breakfast / ASC, how would you describe it?

The children were enthusiastic and positive about what was on offer such as the fun activities, being outside, the staff themselves and how much the children enjoyed their time. Friendships across the ages was a positive that was shared.

- Child aged 6 - "Fun and just like school but no learning"
- Child aged 7 - "best thing in the whole universe"
- Child aged 7 - "good fun"
- Child aged 7 - "You can get outside if you like"
- Child aged 8 - "I don't know, erm I got new friends"
- Child aged 8 - "Nice, kind people here, give you fruit for breakfast"
- Child aged 8 - "get to eat nice food & play nice games"
- Child aged 9 - "Describe it as a great place, creative and fun things to do"
- Child aged 10 - "Nice place, might be tired, some fun things to do"

Summary of Children's feedback

The majority of children, both early years and the older children, talked about outdoor play opportunities, exploring nature, and having available active play equipment. They liked creative activities such as painting, singing, and making music. The most important thing they enjoyed was being able to play with their friends and be supported by their childcare practitioners.

The role of the adult in the learning, play and emotional experiences of our children was highlighted as significant to children. This brings even sharper focus on recruitment and ongoing opportunities for professional development a high priority 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 active play, creative arts, and crafts through the imaginative use of found or household recyclable materials, the role of the adult, attachment and supporting home learning, and healthy and appealing menu planning.

Feedback from Councillors

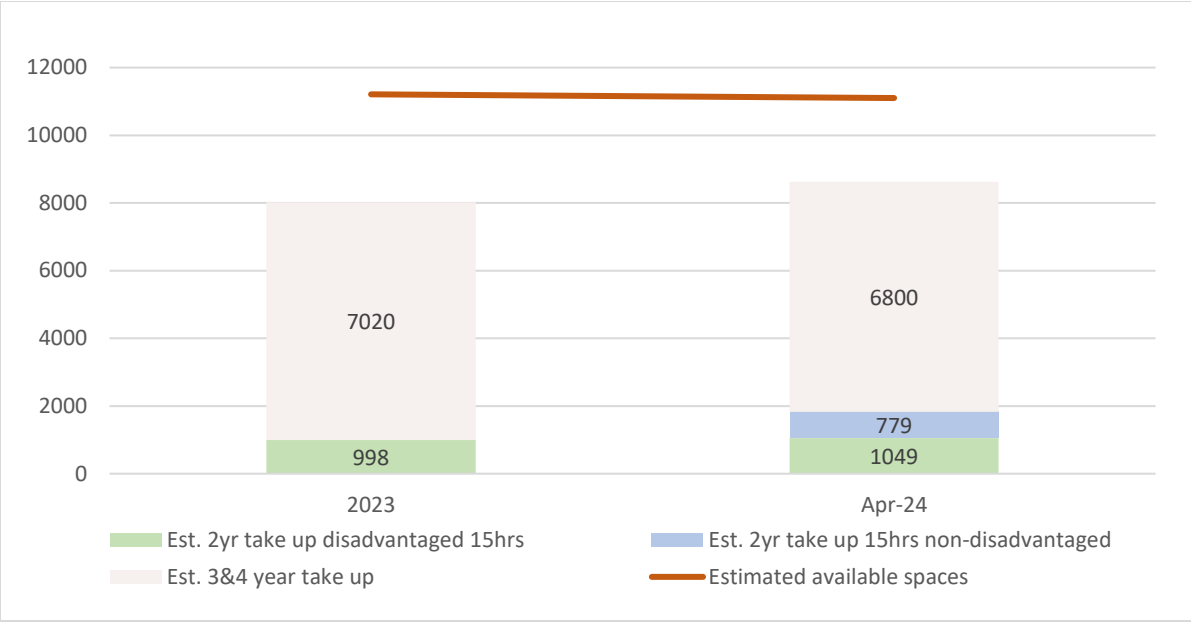
- 80% of Councillors responding said constituents raised an issue about childcare in the previous 12 months
- With regard to **residents with children aged 0-4**, issues raised have been
 - Needs of children cannot be met
 - Cannot afford provision
 - Worries about quality of provision
- With regard to **residents with children aged 5 and over**, issues raised have been
 - Worries about quality of provision
 - Needs of children cannot be met
 - Lack of provision in the school holidays
- Main reasons why constituents were looking for childcare were to work, support child development and to help children socialise
- Based on ward councilor experience, it was perceived that the main reasons parent / carers do not access their free early learning place for 2-, 3- and 4-year-olds and / or childcare are
 - Cost / charges
 - Use family and friends instead
 - Availability of places for all children

Summary of Recommendations

- Royal Greenwich will continue to focus on clear messaging with regard to forthcoming eligibility to the anticipated expansion of funded entitlements in particular aligned to timing and accessibility
- Royal Greenwich will continue to support its childcare sector with accessing revenue and capital grant funding, business modelling and marketing – in particular to support those settings which wish to increase their capacity for 2-year-olds
- Royal Greenwich is strategically aware that the early years childcare sector, in particular, continues to experience pronounced challenges with recruiting quality and qualified staff – in particular those with Level 3 qualifications
- As with all London Boroughs, the incidence of children and young people with SEND and EHCPs continues to increase. Royal Greenwich will continue to therefore prioritise the organisation of and the promotion of relevant courses and qualifications to support practitioner knowledge, skills and confidence
- Royal Greenwich will continue to systematically and strategically support childcare providers to network with their peers – a progression which will continue to support the (most) effective accessibility to formal childcare for children and young people with SEND

- Royal Greenwich will continue to be mindful that affordability of formal childcare continues to act as the most frequent barrier to parents accessing this type of support, and therefore align their ongoing strategy to the opportunity that the extended funded entitlements will provide to certain families
- Royal Greenwich will retain a strategic awareness that childcare provision for 2-year-olds evidently remains a high priority for relevant young families in the borough – and that this will have a bearing accessibility when further demand impacts the sector in April 2024 as an outcome of the introduction of the 15 hours of free childcare to specific working families
- Royal Greenwich will consider how it can *continue to* attune its development capabilities aligned to geography, in particular with a focus on areas where parents/carers are signaling a notable future intention to access specific settings: such as (in) the South or where there developments.
- Royal Greenwich will continue responding to the voices of around shaping the advice and training offer to support the workforce in outdoor active play, creative arts and crafts through the imaginative use of found or household recyclable materials, the role of the adult, attachment, responding to behavior positively and supporting home learning, and healthy and appealing menu planning
- Royal Greenwich will continue to support workforce professional development and quality improvement by focusing on the Early Years Foundation Stage framework, learning from Ofsted inspections and registration requirements, SEND, Speech, Communication & Language, home learning, safeguarding, First Aid and mental health and wellbeing of children and practitioners

Figure 46 : Estimate of 2,3 & 4 year take up across both current disadvantaged and new working families free entitlements from April 2024



Methodology

GLA 2023-based BPO mid-year estimates (March 2023)

Early Years Headcount Royal Greenwich (Autumn term 2023)

Pupil level school census January 2023

January 2023 SEN2 return

Ofsted inspections report March 2023

Royal Greenwich Local Ofsted Outcome Tracker

2021 Office for National Statistics (ONS) census data

2023 Place Group Childcare Sufficiency and Sustainability Intelligence Assessment

DWP (Department for Work and Pensions) list of eligible 2-year-olds August 2023

See Appendix B

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](#) ; [Childcare Act 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
 - physical and mental health and emotional well-being
 - protection from harm and neglect
 - education, training and recreation
 - the contribution made by them to society
 - social and economic well-being

- 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.
Providing **information, advice and training to childcare providers** and to those who intend to provide childcare
- 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>		