

Childcare Sufficiency Annual Report: 2020 to 2021

1. Introduction

- 1.1 The Childcare Sufficiency Annual report is an annual statement on childcare supply and demand in Haringey over a 12-month period. This summary report is intended to inform elected council members about how the borough's childcare market has changed during the year since the previous annual report. The Childcare Act 2006 requires annual reports to be produced, following the publication of Haringey Council's Childcare Sufficiency Assessment and 2019-2022 Action Plan, in November 2019.
- 1.2 The Childcare Act 2006 requires annual reports to be produced, following the publication of Haringey Council's Childcare Sufficiency Assessment and 2019-2022 Action Plan, in November 2019.
- 1.3 Section 6 of the Childcare Act 2006 places a duty on local authorities to ensure there is sufficient childcare to meet the needs of parents who require childcare for them to work or undertake education or training to obtain work. The Council's role, under the Act is to retain an overview of the market and facilitate the childcare market in Haringey to:
 - Deliver childcare that is available, accessible and affordable so that parents have the opportunity to use childcare in their area.
 - Deliver good quality childcare, that is beneficial to children.
 - Offer choice to parents so they can access childcare that best meets their needs.
- 1.4 Childcare is defined in Section 18 of the Childcare Act 2006 as any form of care for a child and includes education for a child and any other supervised activity. In this report, early education and childcare refers to the full range of provision on offer for 0–14-year-olds (up to 18 years for children with special educational needs and/or a disability).
- 1.5 In Haringey, childcare continues to play a fundamental role in meeting a range of key council objectives, and particularly in:

- Improving outcomes for all children – making sure gaps in attainment, access, and outcomes for the most disadvantaged groups of children are minimised
 - Making available affordable and accessible childcare – supporting employment and pathways into employment for all residents
 - Creating community capacity – growing community wealth through a localised offer meeting a range of local needs
 - Building inclusive neighbourhoods – offering children and families with emerging developmental, disability and special educational needs support and respite
- 1.5 The current pandemic has only served to highlight the fundamental role early education and childcare plays in the development of happy, healthy children, in improving prospects for working parents and carers and in nurturing the ability for communities and society to function well collectively, both socially and economically.
- 1.6 This Childcare Sufficiency Annual Report covers the period November 2020 to November 2021.

2 Scope of the Annual Report

- 2.1 Statutory guidance states that Childcare Sufficiency Assessment report should include information about the current and projected supply and demand of childcare, including specific reference to how local authorities are ensuring there is sufficient childcare available to meet the needs of:
- Children with special educational needs and disabilities
 - Children from families in receipt of Universal Credit
 - Children with parents who work irregular hours
 - Children aged two, three and four taking up funded places
 - School age children
 - Children needing holiday care
 - Details of how any gaps in provision will be addressed
- 2.2 This report includes data and observations collected from within the childcare market.

3 Reporting Period - Context

3.1 Market Conditions in Haringey

- 3.1.1 Haringey is marked by significant inequalities. Deprivation levels are high particularly in the North and East and in pockets across the borough, there are areas of great affluence and wealth. Northumberland Park and White Hart

Lane are the two most deprived wards in Haringey, with Northumberland Park being the most deprived ward in London, and White Hart Lane the 4th.

- 3.1.2 The ward with the most low-income households in Haringey is Northumberland Park and 7,317 (32%) of low-income households across the borough are households with children who are in poverty, while Seven Sisters has the highest at 48%. The proportion of households in fuel poverty are highest in the east of the borough.
- 3.1.3 One in three Haringey pupils are eligible for and claiming free school meals (30.1%). This is significantly above the London average (17.1%). The % of children reaching the expected Good Level of Development at the end of Reception is 75% (2019) which is higher than the national average, yet the overall figure of 74.6% children achieving a good level of development masks a gap between boys ((68/4% and girls 80.9%) and between different communities (Black Caribbean 60.5%, Kurdish 50% and Turkish Cypriot 57.7%.

3.2 Global Pandemic – COVID 19

- 3.2.1 The period under review places childcare sufficiency within the context of the ongoing Coronavirus global pandemic. Across 2020-21, the pandemic had a significant impact on the childcare market. Its effect on childcare providers and families created high levels of uncertainty within the childcare market because of the various tiers of national restrictions across the 12 months and changing patterns of behaviour and employment amongst childcare providers and parents and carers.
- 3.2.2 Measures such as lockdown, working from home and furlough schemes fuelled changing demand for childcare, the scale and duration of which was highly unpredictable.
- 3.2.3 Haringey's early education and childcare sector felt the impact of the COVID pandemic acutely but continued to work hard to maintain its ability to deliver early education and childcare in a consistent and sustainable way. Many providers transitioned to social distancing, new working practices and service delivery models, whilst managing the anxieties and expectations of parents/carers and staff.

4. Summary Findings

4.1 Supply of Early Education and Childcare Provision

- 4.1.1 During 2020-21, the supply of early education and childcare has proved to be resilient. Closure remained low, with only 3 settings recorded as having closed because of the pandemic. The settings profile and number by the end of the review period is set out in the table below.

Table 1: Early Education and Childcare in Haringey

Type of provision	Number
Childminding	170
Day nursery	72
Pre-school	11
Maintained nursery class	46
Maintained nursery school	3
Children's centre day nursery	4
Nursery unit independent school	8
After school club	43
Breakfast club	39
Holiday club	17
Overall*	413

*Number of registered settings with Ofsted April 2021

4.1.2 Within the reporting period the number of Childminders in Haringey has fallen slightly (6%) reducing 54 childcare places and nationally the number registered with Ofsted has continued to decrease. There has been an increase in registered Day Nurseries by two creating 89 childcare places and a decrease by two Pre-schools depleting 42 childcare places.

4.1.3 A stocktake exercise undertaken in 2021, gathered feedback from providers within the early education and childcare market. The summarised feedback below provides some insight into market conditions.

Providers reported:

- increases in running costs.
- Some providers, particularly in the west of the borough, deterred from offering 2-year-old places due to the funding rate being below costs.
- Some childminders and maintained nurseries reported experiencing a drop in take up of the 3- and 4-year-old entitlement.
- Increases in the number of children presenting with additional needs.
- Ongoing concerns over workforce recruitment, retaining staff and maintaining adequate staffing levels, funding.

4.1.4 Particularly enquiry about the impact of the pandemic on operations, generated the following information.

- Demand - Some Private Day nurseries reported an increase in demand. A lower level of demand was reported overall across early years and childcare settings. Decrease in demand overall for paid for hours.
- Evidence of general uncertainty in the market for future demand.
- 5.8% of providers have had to make changes to delivery model i.e. shorter days, fewer hours, some childminders and day nurseries offered more places.
- Vacancy levels - highest amongst childminders and school-based provision.
- Staffing changes – 45 staff furloughed, 22 staff made redundant, 17 settings considered further redundancies.
- Concerns about sustainability, In term of finances -
 - 22% lacked confidence in financial sustainability – highest amongst childminders.
 - 39% projected income insufficient to meet costs – highest in day nurseries and school-based nurseries.
 - Reliance for paid for hours was highest amongst childminders and out of school provision.
 - Reliance of a mixed profile of income was most apparent amongst private day nurseries, with the most typical income split being approximately 44% income from funded free entitlement places and 56% income from fees.
 - 29% of settings had cash reserves, with highest rate being amongst preschool settings types.
 - 60% of all providers had applied for at least one form of government support.
 - 71% of providers expressed business confidence in their financial sustainability over the next 6 months period.

4.2 Quality of the provision

4.2.1 The quality of the supply remained above national average with 99% of early years provision in Haringey judged as good or outstanding by Ofsted.

Table 2: Ofsted data for % of settings which are ‘good’ or better:

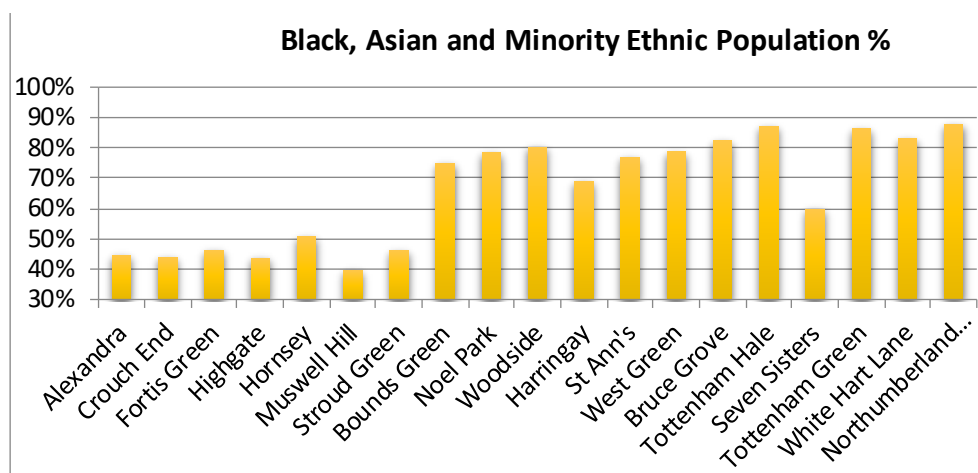
	% of settings ‘Good’ or ‘Outstanding’
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Date	Childminders	PVIs	CCs with childcare	All settings
Dec-20	100%	97%	100%	99%
Mar-21	100%	97%	100%	99%
Jun-21	100%	98%	100%	99%

4.3 Demand for Early Education and Childcare

4.3.1 Haringey has a population of 51,588 0- to 14-year-olds¹, representing 19% of the resident population with the highest number of resident children live in the northeast of the borough.

4.3.2 Population profiles remains diverse in the borough, although significant differences can be seen in some wards.



4.3.3 Population 0-4yrs

The most highly populated wards are in the **east** of the borough, with **Northumberland Park** and **Seven Sisters** wards being the most populated.

Table 3: 0-5 Population by Ward

Ward	0 yrs	1 yrs	2 yrs	3 yrs	4 yrs	Under 5yrs Total	Under 5yrs % of population
Alexandra	130	139	129	154	197	749	6.54%
Bounds Green	194	212	214	189	184	993	6.66%
Bruce Grove	194	186	176	192	190	938	6.38%
Crouch End	162	169	159	162	154	806	6.68%

¹ Source: office of national statistics 2017

Fortis Green	145	163	138	190	173	809	6.45%
Harringay	190	174	186	187	173	910	6.40%
Highgate	124	136	134	142	133	669	6.33%
Hornsey	201	200	202	172	176	951	7.28%
Muswell Hill	106	95	103	134	127	565	5.35%
Noel Park	173	166	176	160	177	852	5.70%
Northumberland Park	270	281	288	263	287	1,389	8.45%
Seven Sisters	288	306	313	335	292	1,534	8.62%
St Ann's	193	211	179	214	173	970	6.12%
Stroud Green	149	158	142	120	122	691	6.17%
Tottenham Green	207	251	203	209	215	1,085	6.57%
Tottenham Hale	237	252	244	256	258	1,247	6.48%
West Green	172	163	162	173	183	853	6.35%
White Hart Lane	157	174	175	181	181	868	6.57%
Woodside	231	217	191	213	222	1,074	6.73%

Source: 2019 Mid Year Estimates (Published: June 2020 ONS)

4.3.4 Projected Population 0-4yrs

GLA population projections show a small increase in the 0-4yrs population in Haringey over the next few years.

Table 4: Haringey Projected 0-4 Population Growth Trend

2021	2022	2023	2024	2025	2026	2027
17,845	17,907	18,007	18,095	18,176	18,250	18,318

Source: GLA Central Trend 2017 Base

4.3.5 Providers in Haringey saw a decrease in demand for childcare influenced and shaped by families changing needs and pandemic anxieties. This was mirrored nationally amongst providers. This reduction in demand appeared to generally be due to families needing less childcare as they temporarily or permanently stopped working. Also evident was an impact from parents and carers working from home, reduced working hours and income, as well as a reluctance to use childcare because of the risk of the spread of the virus.

- 4.3.6 Across the review period, the market changed constantly and demand for childcare fluctuated according to family circumstance, including financial and employment changes.

4.4 Supply of Early Education and Childcare

- 4.4.1 Across 2020-21, the supply of childcare fluctuated due to staffing changes, self-isolation requirements, financial sustainability, and premises restrictions because of the pandemic.

- 4.4.2 The most significant gaps lay in the supply of wraparound provision, including provision for families of children and young people with SEND for the 5-to-11-year age range.

- before school
- after school
- during school holidays

Table 5: Number of out of school providers registered with Ofsted by age range:

Age Range	0 to 4 years	5 to 9 years	10 to 14 years	15 to 18 years
Breakfast club	29	18	4	7
After school club	26	16	15	21
Holiday club	3	7	9	4

- 4.4.3 Sufficiency data for the 2,3- and 4-year-old Free Early Education entitlement is collected on a termly basis and provides an overview of the number of places available in early years settings, by ward and the number of vacancies.

5. Take up of Early Education and Childcare

- 5.1 Tables 6 and 7 below show how many of the available early education and childcare places were taken up by Autumn 2021.

Table 6: Take of Places by 2 Years Olds

Provider Ward	Age Group	% Usage of AM places	% Usage of PM places
Highgate	2 to 3yrs	N/A	N/A
Alexandra	2 to 3yrs	100%	100%
Seven Sisters	2 to 3yrs	93%	90%
Stroud Green	2 to 3yrs	92%	92%
Crouch End	2 to 3yrs	88%	74%
Harringay	2 to 3yrs	59%	59%
St Ann's	2 to 3yrs	34%	34%
Tottenham Green	2 to 3yrs	74%	32%
Tottenham Hale	2 to 3yrs	60%	59%
Northumberland Park	2 to 3yrs	73%	58%
West Green	2 to 3yrs	56%	55%
Bruce Grove	2 to 3yrs	25%	24%
Hornsey	2 to 3yrs	79%	75%
Noel Park	2 to 3yrs	63%	57%
Woodside	2 to 3yrs	62%	62%
Muswell Hill	2 to 3yrs	86%	75%
White Hart Lane	2 to 3yrs	72%	58%
Bounds Green	2 to 3yrs	44%	38%
Fortis Green	2 to 3yrs	57%	49%

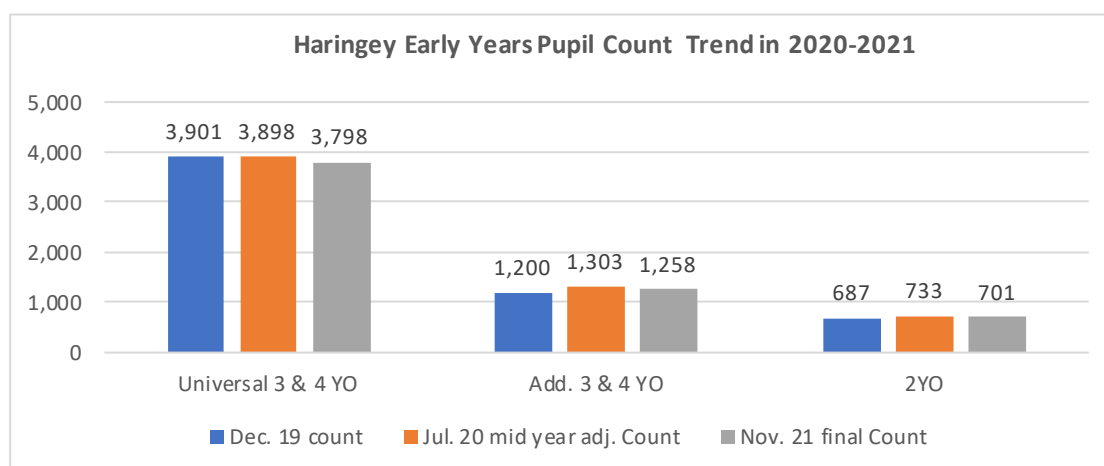
Table 7: Take of Places by 3- and 4-Year-Olds

Provider Ward	Age Group	% Usage of AM places	% Usage of PM places
Alexandra	3 to 4yrs	99%	96%
Bounds Green	3 to 4yrs	38%	31%
Bruce Grove	3 to 4yrs	50%	47%
Crouch End	3 to 4yrs	84%	76%
Fortis Green	3 to 4yrs	65%	58%
Harringay	3 to 4yrs	83%	78%
Highgate	3 to 4yrs	100%	97%
Hornsey	3 to 4yrs	89%	86%
Muswell Hill	3 to 4yrs	89%	90%
Noel Park	3 to 4yrs	61%	47%
Northumberland Park	3 to 4yrs	76%	66%
Seven Sisters	3 to 4yrs	61%	67%
St Ann's	3 to 4yrs	57%	51%

Stroud Green	3 to 4yrs	61%	54%
Tottenham Green	3 to 4yrs	33%	27%
Tottenham Hale	3 to 4yrs	59%	55%
West Green	3 to 4yrs	78%	79%
White Hart Lane	3 to 4yrs	82%	72%
Woodside	3 to 4yrs	66%	61%

- 5.2 In general, participation in early education and childcare amongst our younger populations of children experienced a dip across the review period. The chart below at Figure 1 shows the changes to patterns of participation for 3- and 4-year-olds accessing the universal free entitlement offer, those 3- and 4-year-olds accessing additional hours, as part of the extended 30-hour offer, and for eligible two-year-olds accessing the free two-year-old entitlement.

Figure 1: 2020-21 Free Entitlement Participation Trend



- 5.3 Across the 2-, 3- and 4-year-old entitlements, wards in the east of the borough have a significantly greater number of 'potentially' eligible families compared to those in the west of the borough. **Seven Sisters** and **Northumberland Park** wards consistently record more than 150 families, whereas numbers for Muswell Hill, Alexandra and Highgate wards are far lower.

Our data also highlights particularly low participation numbers within **Seven Sisters** ward, where there is a high number of potentially eligible families, but few 'take up' the entitlement. This is evident across the 2,3 and 4 year old offers. This might be explained by the large proportion of Orthodox Jewish

families who are potentially eligible for the entitlement but may be engaging with culturally appropriate local services, outside of the borough.

6. Sufficiency of provision for children from families in receipt of the childcare element of Working Tax Credit or Universal Credit

6.1 Haringey Council works with early years and childcare providers, and key partners, to ensure that there is sufficient provision to meet the needs of all families including those in receipt of the childcare element of the Working Tax Credit and welfare reforms.

6.2 The borough currently has sufficient places to meet the needs of families who qualify for free early education. Eligible families are supported to apply for two-year-old funding through Children's Centres, health, social care, community, and employment partners. In addition, a childcare brokerage offer is in place for families who have difficulty in finding a place or need support and advice to find the most suitable childcare for their needs.

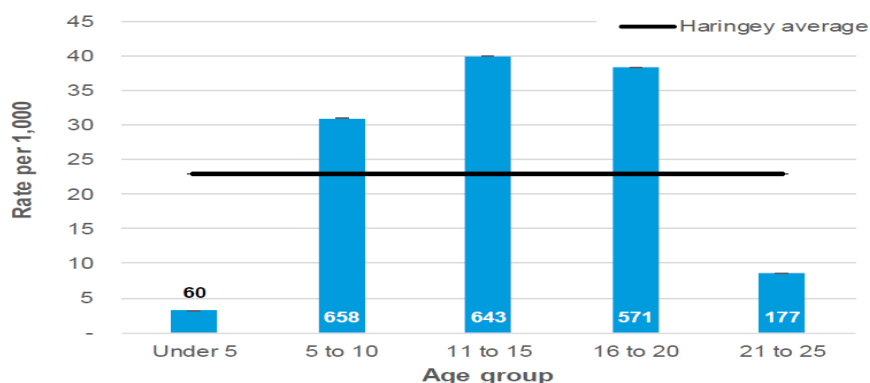
7. Sufficiency of provision for children with special educational needs and disabilities

7.1 The provision of appropriate early years and childcare that meets the needs of children with special educational needs and, or disability (SEND) continues to be of high importance in Haringey. Haringey's populations of children and young people with SEND continue to increase and improving access to high quality provision that meets the diverse needs of children and young people with SEND and their families proved particularly challenging during this reporting period.

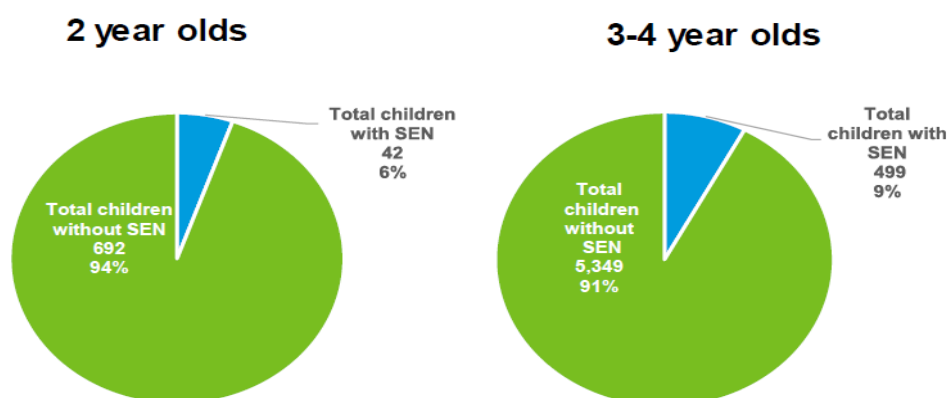
7.2 Figure 2. shows the number of children and young people with Education, Health and Care Plans (EHCPs).

Figure 2: Children and Young People (0-25) with EHCPs

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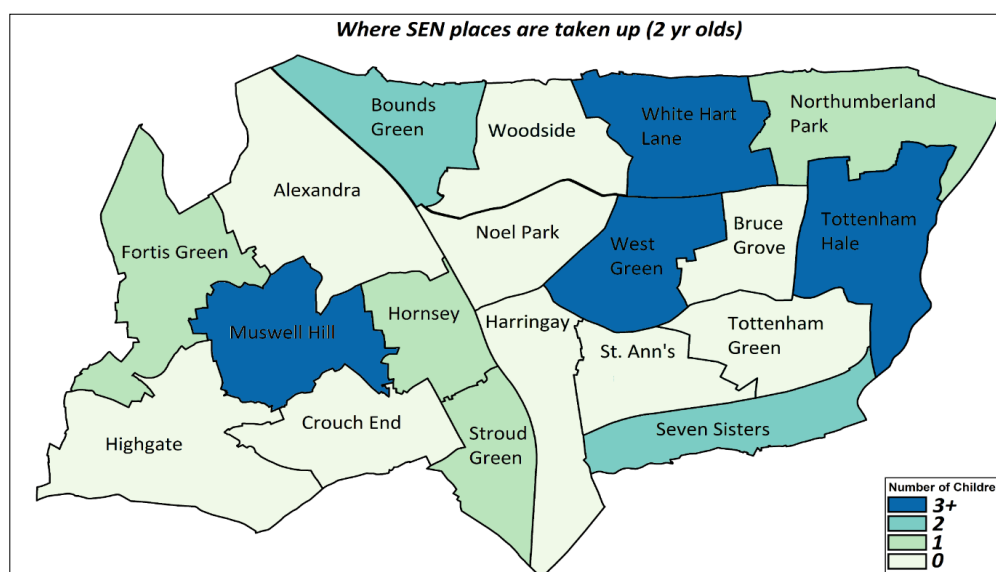
- 7.3 Ensuring there is an adequate supply of childcare to meet the needs of working parents and carers of children and young people with special educational needs and disabilities continues to be a priority for childcare sufficiency planning.
- 7.4 Existing gaps in the availability of suitable provision for children, young people, parents, and carers widened during the 2020-21 period because of the pandemic. There continued to be a lack of sufficient, affordable provision for children and young people. Current work to address sufficiency gaps includes a priority focus on working with the childcare market to deliver after-school, weekend and holiday provision for children and young people, particularly for children aged 5 – 8 years with SEND.
- 7.5 In Haringey, our SEND Local offer for children aged 5 to 25 years supports those with additional and complex needs. In early education and childcare, Inclusion funding continues to be available to support 2-, 3- and 4-year-olds with SEN in nursery provision. This continues to have a positive impact on the proportion of young children with SEND accessing early education and childcare.



7.6 Additionally, disability access funding was available to support the access needs of 3- and 4-year-old children attracting Disability Living Allowance (DLA). The 2020-21 period saw a decline in the number of children supported by DAF funding. This is believed to be a consequence of the pandemic on parental confidence and access to support with DLA applications.

7.7 Haringey maintained a higher percentage of two-year olds with SEN accessing the early years (funded) entitlement, compared to the averages across London and England.

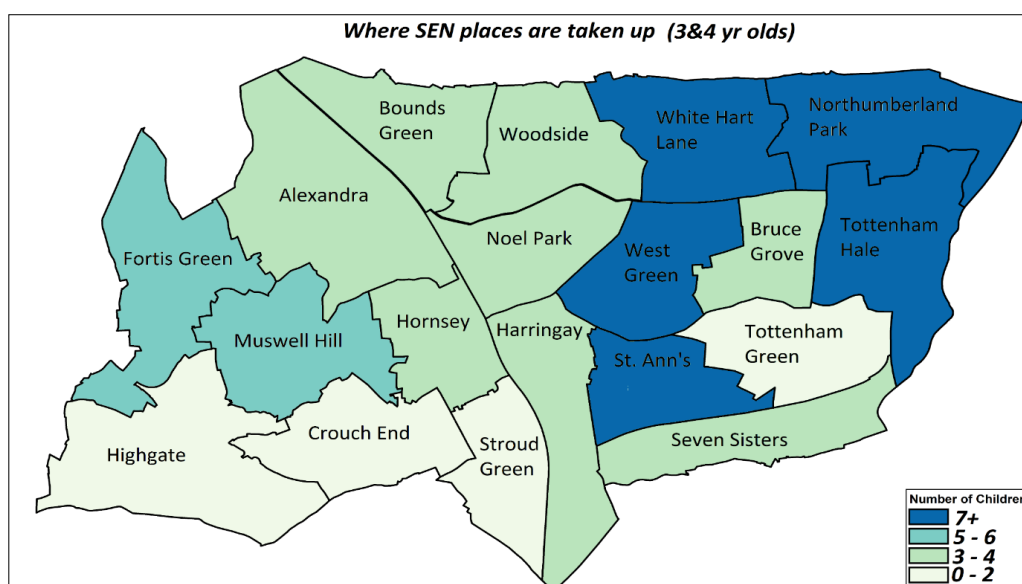
Figure 3: Levels of Free Entitlement Participation by 2-year-olds by Ward.



Source: Haringey Inclusion Service, Oct 2020

7.7 For three- and four-year-olds, participation by children with SEN was highest in the east of the borough.

Figure 4: Levels of Free Entitlement Participation by 3- and 4-year-olds by Ward.



Source: Haringey Inclusion Service, Oct 2020

8. Sufficiency of provision for childcare requiring out of school provision and holiday care

- 8.1 In addition to childminders and group providers who operate all year round, there are several clubs and groups in Haringey operating in the school holidays and providing before- and after-school activities and care.

Table 8:

Number of registered out-of-school and holiday care providers*	2020	2021
All providers	148	159

*Source: Synergy database 2021

- 8.2 At the beginning of the 2020-21 period there were 148 known (registered) out-of-school and holiday clubs in Haringey. Throughout the review period, work was undertaken to engage with the out of school and holiday sector and build an improved network of provision. By late 2021, there was an increase of 11 in the number of provisions in the borough.
- 8.3 Many schools in Haringey continue to offer breakfast and / or after-school clubs, extending the availability of childcare here. Many will also host holiday activities and sports clubs. School provision plays an important role in the overall sufficiency picture and continuing to work with all phases of schools to maximise provision remains key. Given the fact that provision delivered by schools does not require separate Ofsted registration, schools are a key partner for the Council to work with as we seek to address sufficiency gaps.

- 8.4 During the lockdown period and the initial period emerging out of lockdown in mid-2020, out-of-school and holiday care providers faced significant restrictions to reopening. This had an impact on viability and sustainability of for some providers and limited the availability of childcare for parents and carers, particularly those considered critical workers.

9. Sufficiency of provision for children with parents who work irregular hours

- 9.1 An important aspect of sufficiency is understanding the needs of parents and carers working non-traditional or irregular hours. For these parents and carers access to flexible childcare is crucial to maintaining employment and ensuring they can access support from registered childcare providers, offering high quality care. The number of Haringey Ofsted registered providers offering before 8am, after 6pm and weekend care in Haringey is set out in Table 9. below:

Table 9:

	2020	2021
Number of providers open outside standard hours before 8am and after 6pm)- Out-of-hours care	137	100
Providers open at weekends	36	48

*Source: Synergy database 2021

- 9.2 The number of childminders opening before 8am remained about the same from 2020 to 2021 but the number opening after 6pm fell by 13%. More providers opened at weekends than did last year. Most of the weekend places were offered by childminders and private providers providing a range of weekend activities.

10. Actions to ensure sufficient childcare

- 10.1 Council activity to support the sufficiency of early years and childcare places continued throughout the 2020-21 period.
- 10.2 Emerging out of the restrictions in place across 2020-21 and the continuation of the pandemic means that the close tracking the supply and demand of childcare remains an important activity for the Council. Monitoring the supply of childcare, including the closure of providers no longer financially viable continues as a priority in 2021-22. Engaging with parents and carers and gaining regular feedback will assist the Council to maintaining a picture of the demand for childcare, as parents' work patterns continue to evolve and change.

- 10.3 Given the impact on parental confidence across 2020-21, it is necessary to continue to promote the early years entitlement offers, the local SEND offer and continue to work in partnership with the childcare market to adapt to changing needs and ensure there is access to high quality childcare information, advice and support for parents and carers.
- 10.4 An early years review undertaken in Autumn 2021, established an early education and childcare task and finish group, with the intention of:
- working collaboratively, and in partnership, with the sector and key stakeholders to consider how we best meet the early education and childcare needs of children, families, and residents.
 - enabling stakeholders to delve more into the detail and understand where we are now and what we want to achieve.
 - Developing sets of options that seek to address identified priorities.
- 10.5 As part of responding to the outcomes of the 2021 Early Years Review, work has begun with key stakeholders and partners to develop action plans to strengthen the early education and childcare offer within the borough. Initial areas of focus emerging from this task and finish work are:
- Narrowing the attainment gap – Boys, Black Caribbean, Turkish Kurdish.
 - Equal access to early education and childcare for children with SEND.
 - Improving early identification and intervention.
 - Increasing take up of the two-year-old free entitlement as an integral part of our early intervention approach.
 - Increasing and broadening participation in the 3- and 4-year-old free entitlement.
 - Retaining sustainable early education and childcare to meet changing demand across the borough in a post pandemic landscape
- 10.5 We believe that these emerging priorities align with the current childcare action plan and will form part of the review and refresh of the plan, when Haringey's next full Childcare Sufficiency Assessment exercise is completed and reports in Autumn 2022.