



2019
Childcare Sufficiency
Assessment

Summary

Introduction

The 2019 Childcare Sufficiency Assessment (CSA) presents an analysis of the supply and demand of childcare, along with parents' views on childcare in Haringey, as of 2019. Fundamentally, in 2019, the required research had a particular focus on the evolving 30 hours childcare offer and how its first 18 months of roll out was implemented.

Key Findings

The London Borough of Haringey faces a number of challenges. Forecast number of children (ONS Statistics 2016) shows the population of school age children will increase at a greater rate than the population of pre-school children. The School Place Planning report 2018 indicated that demand is falling for first place reception preferences. However, the impact of large scale housing developments will influence childcare place projections for the future. There is an inward flow of migrant families in Haringey including a tangible number of young families whose first language is not English.

Haringey is the 7th most deprived borough in London and 2,680 of the population of 18,990 (0 to 4 year olds) (14%), live in out of work benefit households¹. A high percentage of children from low income families (under 16 years old) live in the east of the borough². Unemployment is relatively high in Northumberland Park, Tottenham Hale and Tottenham Green wards. Average annual household incomes in Haringey amount to £37,696, with Northumberland Park and White Hart Lane wards falling below the average of annual household income of £29,400 (Office of National Statistics 2019)³

The Council has plans for housing and employment growth, particularly in North Tottenham and this will increase the demand and need for childcare.

The majority of parents using formal childcare were highly satisfied with their arrangements. Two thirds of the survey respondents had not experienced barriers to childcare. Of the ones that did, affordability of childcare was the highest response provided. Parents use a mix of formal and informal childcare with grandparents being the highest method of informal childcare.

Parents/carers of 3 and 4 year olds who were accessing the 30 hours childcare offer have said that it helped them to remain in employment. Some of the key challenges that childcare providers have faced with the implementation and delivery of 30 hours has been the initial issuing of eligibility codes and the system of reconfirmation.

¹<https://www.gov.uk/government/statistics/children-in-out-of-work-benefit-households-31-may-2017>

² <https://data.london.gov.uk/dataset/children-poverty-borough>

³<https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/incomeandwealth/bulletins/householddisposableincomeandinequality/financialyearending2019provisional#analysis-of-average-income>

Sufficiency of childcare – current supply

Haringey has a diverse mix of provider types with many registered places for delivery of childcare. There are over 300 providers offering c8,675 childcare places with a majority in Fortis Green, Crouch End and Tottenham Hale wards. There are 85 registered out of school providers who offer c3,049 places and offer a range of breakfast and after school clubs for 2 to 11 year olds. Holiday playschemes cover 5 to 11 year age range.

Childminder registrations have decreased, this is in line with national trends. However, there has been an increase in Childminders offering the funded entitlement places.

The highest number of resident 2, 3 and 4 year olds are resident in the following three wards: Seven Sisters, Tottenham Hale and Northumberland Park. The ongoing availability of childcare places is key in these wards to meet the council's sufficiency duty.

There has been an increase in private providers since the last Childcare Sufficiency Assessment registering to deliver childcare places.

There is a shortage of out of school and holiday provision for the growing population of 5 to 10 year olds and children with SEND. There is limited provision on offer for the 10 to 14 age range.

There are high levels of vacancies in registered provision across the borough and the sufficiency of childcare will change in some wards due to housing and development growth. Affordability of childcare is a barrier to access for some families and raising awareness of how childcare costs can be reduced through government schemes and benefits will support families.

There is little childcare reported to be available at weekends. Most settings are typically open from 8.30 am to 6.00 pm.

There are six Network Learning Communities (NLCs) which have been used as the base for the Childcare Sufficiency Assessment: 1. Muswell Hill/Highgate; 2. Hornsey/Stroud Green; 3. Wood Green; 4. Harringay/West Green; 5. North East Tottenham; 6. South East Tottenham.



Assessment of demand

The provider audit indicates a high level of vacancies, particularly for 3 to 4 year age range within the East of the borough and a high level of waiting lists occurred in the West Green ward. The high number of vacancies across the borough and numbers on waiting lists suggests parents are seeking particular types of childcare in particular areas and times. There are indications of demand within some wards for under 2 year olds and out of school provision for 5 to 10 years of age.

Use of childcare

Use of childcare was highest amongst the 3-4 year old age range. Use of childcare was lowest for the youngest and oldest age ranges (under 2 year and 10-14 years). Use of family members to provide childcare is relatively high across the 5 to 18 year olds and the under 2 age range.

Parents/carers who were using childcare said that it helped them work or study and supported their children to socialise. Parents stated that the most important reason when choosing childcare was that the setting was close to home (90% of applicable parents/carers).

The average number of weekly hours that parents stated they were using formal childcare was for 23 hours per week.

Of the parents who responded to the 30 hours childcare offer survey, 4 out of 10 parents of 3 and 4 year olds said they are using the offer and it had helped themselves or a partner to remain in work/employment.

Parent/carers and their children with SEND were using both formal and informal childcare, however there was only limited examples of such families using a 30 hour childcare place.

Where parents/carers are not using childcare, many report this is through choice (39% of non childcare users, 290 survey respondents). The cost of childcare was also a reason reported by 27.5% of respondents, 204 parents/carers.

Demand and trends in childcare

Childcare providers witnessed the following notable and new trends during the previous CSA period 2016 to the current 2019:

PVI providers

- Receipt of more "enquiries" for places for babies
- An increased incidence of parents saying that they are unable to afford fees
- An evolving demand for the 30 hours childcare offer

Maintained nursery classes

- An increased demand for longer/extended hours of care
- An increased demand for full-time hours of care
- An evolving demand for the 30 hours childcare offer

Childminders response

A *decreased* demand – in general – including for funded entitlement places
We are aware of more parents preferring to access setting-based early years childcare
An increased demand for longer/extended hours of care

After school provisions

Generally demand has increased
A higher incidence of *working* parents are enquiring about a place
Parents with zero hours contracts require more flexibility

Breakfast clubs

Generally, demand has increased
A higher incidence of parents requesting a pre-8am opening time
More requests to take 3 year old children

Holiday playschemes

A higher incidence of parents who struggle to afford fees
A discernible increase in demand from carer's of children with SEND

Childcare costs

Childcare costs in Haringey are higher than the inner London averages (£7.50 per hour in Haringey compared to £6.29 in inner London). Costs of childcare are cited as barriers by parents/carers consulted as a part of the Childcare Sufficiency Assessment. Parents who use formal childcare were happy with their current arrangements (67% of applicable parents).

Support for the cost of childcare

It is important all stakeholders are aware of the early year's entitlements and other government support towards the cost of childcare to maximise reach and engagement and to make childcare affordable for families.

Meeting needs of the diverse community

Different cultures bring challenges in some community groups who choose not to engage in early learning for 2, 3 and 4 year old children. Stakeholders working with Turkish, Kurdish, Somali and Orthodox Jewish families have said these groups identify a preference for provision that reflects the culture (and language) of their community.

Childcare for children with Special Educational needs and disabilities

Parents/Carers who have children with SEND were using both formal and informal childcare, however there was only limited examples of such families using a 30 hours childcare place.

Parents/Carers described “*excellent*” practice and support from childcare providers in the Borough – and there was two ways in which they repeatedly felt there was still room for improvement:

- even more training for professionals in SEND themes
- enhanced physical access and resources at some settings

Early learning funded entitlement for 2, 3 and 4 year olds

Figures on take up of the funded entitlements for 2, 3 and 4 year olds are linked to the January census. A national average is used to measure local authority take up rates across England.

The January 2019 census indicated that 2Y0 take up in the borough was 47%, compared to the inner London boroughs average of 56%. 3 year old take up amounted to 75%, compared to the inner London boroughs average of 79%. 4 year old take up amounted to 82%, compared to the inner London boroughs average of 82%. 30 hour take up for 3 and 4 year olds amounted to 78% of the eligible population.

Quality of provision

The overall quality of provision is on an upward trajectory with the majority of childcare providers across the sector now judged as Good or Outstanding by Ofsted.

Sufficiency looking ahead

There are a number of initiatives and policies directives increasing parent and child access to high quality education.

Housing growth and economic regeneration will lead to more working families and more housing, increasing the demand for childcare and enabling local communities to improve their economic wellbeing.

Employment and housing growth

Growth in employment is reported to be in the retail and care sectors. These sectors may require employees to work outside of traditional working hours i.e. between 9am to 5pm. There is limited registered childcare provision available before 7am, in the early evening or weekends. The ongoing availability of childcare will be monitored to ensure that this does not create a barrier to work.

Haringey’s borough plan 2019-2023 provides a commitment to deliver Housing growth the bulk of which is expected to be provided in the Tottenham vicinity, which via the Tottenham

'zone' and the North Tottenham 'zone' will eventually yield a combined total of 2,565 new dwellings, incorporating the Hale Village site.

Introduction of universal credit

This new integrated benefits system for people both in- and out-of-work has been rolled out for new claimants. Existing benefit claimants who do not have a change of circumstance will be migrated onto Universal Credit by March 2022. Part of the rationale for Universal Credit was making sure there is an increased incentive to work and people are better off working. We have seen a high increase in 30 hours since the rollout of universal credit and there has been a progressive increase in take up since 2017 when 30 hours was first introduced.

Key Gaps and Priorities

There are priorities which childcare sufficiency planners within the London Borough of Haringey could consider as an outcome of the 2019 CSA:

Potential Emerging Gap 1: The Seven Sisters ward accounts for a relatively high number of resident 2, 3 and 4 year olds, plus a relatively high ongoing birth rate.

As part of the overall Tottenham Regeneration initiatives the High Road West project will continue to generate the establishment of (c1,200) new dwellings in forthcoming years in the Seven Sisters ward.

Potential Action: Childcare sufficiency planners within the London Borough of Haringey should prioritise monitoring the ongoing availability of 30 hours childcare offer places in the Seven Sisters ward – and potentially instigate action(s) to further stimulate the delivery of funded early years provision within that wider South West Network Learning Community, including the wards of Bounds Green, Tottenham Hale and Tottenham Green wards (where the population of young children is increasing), aligned to the ongoing incidence of (any) vacant places.

Potential Emerging Gap 2: Two wards which evidently account for a relatively low number of '30 hours childcare children' *on roll* in 2019 are (the relatively deprived, including in terms of historically high unemployment levels, like the Seven Sisters ward above) Northumberland Park ward. However both wards account for a relatively high number of resident 3 – 4 year olds, plus 2 year olds.

Potential Action: Childcare sufficiency planners within the London Borough of Haringey should prioritise monitoring the actual availability of 30 hours childcare offer places in both wards – and potentially instigate action(s) to (further) stimulate the delivery of such funded provision within the two localities, if demand becomes more pronounced. Indeed an important intervention of childcare sufficiency planners will be to (continue to) stabilize the childcare market within such relatively deprived wards, including in light of the reduction of the hourly funding rate of the free entitlement for 2 year olds, which is set to be implemented across the borough in September 2019. Part of this stabilization will be achieved through the provision, by the London Borough of Haringey, of structured business support to early years childcare settings to highlight areas of risk in provider viability and sufficiency of childcare places.

Potential Emerging Gap 3: The population of 2, 3 and 4 year olds continues to be relatively high in the Tottenham Green ward and the Tottenham Hale ward. This is an area which is set to account for a pronounced incidence of new housing developments, and thus it can be reasonably assumed a growing population of resident 2 – 4 year olds – including via the Mayor’s Housing Zone initiative/the Hale Village site.

Potential Action: Those responsible for childcare sufficiency planning within the borough need to retain an awareness that pressure for future funded early years childcare will – with a high probability – be focused on the eastern/Tottenham vicinity. Ongoing structured business modelling support, offered to/accessible to the vicinity’s early years childcare sector would continue to encourage/enable more 30 hours childcare places, including through such further support offered to that locality’s childminders.

Those responsible for childcare sufficiency planning within the borough should consider working with those LA colleagues who have an involvement in the Hale Village development and its (new dwellings) phasing.

Potential Emerging Gap 4: A relatively high number of new dwellings are set to be constructed and eventually occupied in the Northumberland Park ward, situated in the north east of the borough. This ward also (already) accounts for a relatively high number of resident 2, 3 and 4 year olds, high levels of deprivation and unemployment, and a relatively low number of PVI sector early years childcare providers/settings.

Potential Action: (As with emerging Gap 1) childcare sufficiency planners within the London Borough of Haringey should prioritise monitoring the actual availability of the free entitlement for 2 year olds places in the (relatively deprived) Northumberland Park ward – and potentially instigate action(s) to (further) stimulate the delivery of early years childcare provision within that locality. These actions could include focused early years and childcare development work – through start-up stimulation – in the Northumberland Park ward, including in partnership with the local (voices of and advocates of the) community.

Potential Emerging Gap 5: All responding (to the Providers Audit) providers/settings and registered childminders who were evidently not yet offering 30 hour childcare offer places in 2019 were asked whether they envisaged that they would begin to provide 30 hours childcare places at some point in 2019. 0 early years childcare providers/settings stated that they did and only 2% of registered childminders stated that they did. However, 6% of early years childcare providers/settings stated: Maybe – as did 13% of registered childminders.

Potential Action: Childcare sufficiency planners within the London Borough of Haringey could focus on converting those Maybes into more tangible intentions - particularly in areas of high deprivation, such as the Northumberland Park ward, including in order to help meet increasing demand for 30 hours childcare offer places throughout the borough

Potential Emerging Gap 6: The 2018 Haringey School Places Planning Report stated that the number of children and young people with a statement that were resident in the borough is on *an overall upward trajectory*. However, there was 0 examples of responding childminders – via the 2019 Providers Audit – stating that, in 2019, they had a 2 – 4 year old *with SEND* who was occupying a funded place. More encouragingly, two-thirds of responding early years childcare providers/settings stated that at least one child with SEND was occupying a funded childcare place at their setting.

Potential Action: Childcare sufficiency planners and SEND professionals/officers within the London Borough of Haringey, as part of a drive to further promote the ability of local childminders to provide funded childcare places, could work in partnership to ensure that a certain number are also equipped to effectively care for such 2 – 4 year olds with SEND, with a particular focus on the relatively deprived wards of the borough, such as Northumberland Park, Seven Sisters, Tottenham Hale and Tottenham Green.

Potential Emerging Gap 7: A number of registered childminders have expressed their concerns that parents are not as aware as *ideally they could be* that they can also viably deliver the 30 hours childcare offer. The childminders who attended a focus group session in early 2019 and which was targeted at their profession concurred that the local authority and its services could best help by promoting a message to local young parents that the 30 hours childcare offer can be accessed via registered childminders as well as the local day care sector. It was also observed how certain childminders acknowledged that (in the words of one of their number) “...we are not as proactive in marketing as nurseries are”.

Potential Action: Childcare sufficiency and business planners within the London Borough of Haringey should prioritise their ongoing (strategic) work to raise and maintain the profile of the local childminding sector as a source of funded childcare support.

Potential Emerging Gap 8: A number of responding early years childcare providers/settings considered a priority for the London Borough of Haringey to be offering more support which would help them to address the challenge of (concisely and accurately) describing eligibility and the processes involved with accessing the entitlements offer to their growing numbers of EAL parents and families.

Potential Action: The London Borough of Haringey should continue its dedicated outreach work which supports EAL families, including via the role that its Children’s Centres have to support BME and EAL communities.

Potential Emerging Gap 9: As part of the Providers Audit all (a) early years childcare providers/settings and (b) registered childminders were asked: *How would a reduction in the 2 year old free entitlement affect your ability to provide such provision?*

79% of applicable PVI settings stated: we might have to reduce the number of places we offer – and were most frequently located in the Highgate/Muswell Hill Network Learning Community.

100% of applicable maintained nursery classes/nursery schools stated: we might have to reduce the number of places we offer.

61% of applicable registered childminders stated: we might have to reduce the number of places we offer – and were most frequently located in the southern vicinity of the borough.

Potential Action: The London Borough of Haringey should continue to monitor the ongoing number of eligible 2 year olds in wards such as the relatively densely populated Seven Sisters ward in order to evaluate the extent to which any changes to the hourly funding rate for the free entitlement for 2 year olds may affect the availability of such (funded) support/provision.

Potential Emerging Gap 10: As an outcome of the Providers Audit, 6% of applicable early years childcare providers/settings stated that over the next 2 years they intend to reduce the

number of funded places that they offer to eligible 2 year olds – and 3% of applicable registered childminders stated likewise

Potential Action: The London Borough of Haringey should work in partnership with those early years childcare providers who – as an outcome of the 2019 Providers Audit – stated that they intended to *increase* the number of free entitlement for 2 year olds places during 2019 – 2021, in order to offset potential reductions by other applicable providers.

Potential Emerging Gap 11: Approximately 1 : 5 of all responding early years childcare providers/settings *did not anecdotally feel* that there were sufficient childcare places *in their immediate geographical area* for children aged *under 2 years* – a response which was most frequently given by such providers that were situated within the western locality of the borough. Additionally a trend which a number of responding early years childcare providers/settings fed back was that they had been in receipt of more “*enquiries*” for places for babies in recent years.

Potential Action: Those responsible for childcare sufficiency planning within the London Borough of Haringey should continue to monitor demand for childcare places for under 2 year olds and where/when evidently required work in partnership with local early years childcare providers to encourage/incentivize the establishment of further such places, including aligned to the fact that parents of 2 year olds that are eligible for the entitlement continue to view it as a valued form of support.

Potential Emerging Gap 12: An outcome of some focus group sessions with early years childcare providers/settings in 2019 was a belief that Haringey-based employers were not invested in, or aware of, the 30 hours childcare offer as ideally, they could be.

Potential Action: Childcare sufficiency and business planners within the London Borough of Haringey could prioritise further promoting and raising the profile of the 30 hours with local employers including via their HR representatives.

Potential Emerging Gap 13: London Borough of Haringey early years childcare providers/settings most frequently expected demand to be Higher – But not Significantly in 2020 – 2021. One-third of the early years childcare providers/settings that stated an answer of *Significantly Higher*, by that time, were located in the Tottenham Hale ward

Potential Action: Childcare sufficiency planners within the London Borough of Haringey could consider this finding aligned to Gap 3, which proposed that those responsible for childcare sufficiency planning within the borough need to retain an awareness that pressure for future funded early years childcare will – with a high probability – be focused on the Tottenham Hale and Tottenham Green wards linked to building developments.

Potential Emerging Gap 14: The London Borough of Haringey out of school childcare providers/settings most frequently expect demand to be higher in 2021. The Tottenham Hale, Tottenham Green, Seven Sisters and Bounds Green wards accounted for the highest frequency of the response(s): Significantly Higher or Higher – but Not Significantly. The same wards also account for the highest resident population for 5 – 14 year olds, at levels that are indeed rising.

Additionally, parents were invited to state whether they intended to use any formal childcare in the next two years, which they were not, in 2019, currently accessing. In terms of out of school childcare, an after school club was stated by 1 : 4 of applicable parents who were most frequently resident in the Tottenham Hale, Tottenham Green, Seven Sisters and Bounds Green wards.

Potential Action: Childcare sufficiency planners need to retain an awareness that pressure for future out of school childcare will – with a high probability – be focused on the Tottenham Hale, Tottenham Green, Seven Sisters and Bounds Green wards and may need to again respond by initiating approaches to stimulate the market, including the establishment of new provisions, especially for the school holiday periods.

Potential Emerging Gap 15: The 2018 Haringey School Places Planning Report outlined how the number of children and young people with SEND that were resident in the borough is on *an overall upward trajectory*. Additionally, the Haringey Needs Assessment for children with SEND has concluded that the highest prevalence rates in terms of all children and young people with SEND were observed in the Seven Sisters ward in the eastern vicinity of the borough.

Potential Action: Though early years and childcare providers fed back their willingness and ability to provide provision for children with SEND, the increase in numbers needs to be factored in to planning by the London Borough of Haringey, including in terms of the (a) accessibility to funded childcare places; (b) the relevant training need(s) of early years and childcare professionals; (c) the further promotion of the existence of the Disability Access Fund.