



# **Childcare Sufficiency Assessment**

**Summary report**

**September 2015**

**hemp**sall's

Working to achieve equal chances, challenge disadvantage  
and achieve best practice in services for children and families since 1999

<b>Contents</b>	<b>Page</b>
<b>1 Introduction</b>	<b>3</b>
<b>2 Key findings</b>	<b>3</b>
2.1 Sufficiency of childcare – current supply	4
2.2 Use of childcare	6
2.3 Assessment of demand	7
2.4 Childcare costs	8
2.5 Meeting the needs of a diverse community	9
2.6 Childcare for disabled children and children with additional needs	9
2.7 Free early learning (education) for 2, 3 and 4 year olds	10
2.7.1 Quality of early years provision	10
2.8 Sufficiency looking ahead	12
2.8.1 Employment and housing growth	12
2.8.2 Benefits changes	12
2.8.3 Expansion of free early learning for 3 and 4 year olds	13
<b>3 Recommendations</b>	<b>13</b>
3.1 Support for the cost of childcare	13
3.2 Information and brokerage	14
3.3 Supporting take-up of free early learning for 2 year olds	15
3.4 Availability	15
3.5 Quality of early years provision	17

Hempsall's  
15 Morledge Street  
Leicester LE1 1TA  
0844 824 3083

## **1 Introduction**

Haringey Council commissioned Hempsall's to undertake a Childcare Sufficiency Assessment (CSA) between May and July 2015. Details of the methodology employed are included in the full CSA report. This report presents the key findings of the assessment.

Local authorities have a duty under the Childcare Act (2006) to ensure a sufficiency of childcare for working parents, parents studying or training and for disabled children. The focus on supporting working parents and those studying or training for work supports a number of other policy priorities, including:

- child poverty
- supporting economic well-being
- Building Resilient Families and Communities
- supporting the children's centre remit
- supporting children to achieve their potential.

## **2 Key findings**

The London Borough of Haringey faces a number of challenges. The population is growing and is highly diverse, with a high proportion of residents born overseas. Haringey is one of the most deprived authorities in London and nationally, and an estimated 25% of children live in out of work families. Unemployment is relatively high and workplace earnings fall well below London averages.

The council has ambitious plans for housing and employment growth, with a focus on the Tottenham area to deliver in both areas. Linked to projected population increases, new homes and new employment opportunities will increase demand and need for childcare.

Employee earnings by workplace are considerably below London averages (83% of the average gross weekly pay) and costs of childcare are more expensive for nursery provision than found across the capital.

The majority of parents using childcare are generally happy with their arrangements and with the quality of the childcare used. However, survey responses also indicate that parents and carers are compromising their preferred use of childcare as a result of a lack of availability and choice and a relatively high percentage would change their childcare if they had a choice (30%).

Findings identify the cost of childcare as one of the main barriers, with an impact on parents' ability to work or study for work. Location of preferred childcare (possibly related to issues of affordability) is also an issue. There are high numbers of children on waiting lists for certain providers, and high levels of vacancies generally, which suggests a mis-match between supply and demand.

## **2.1 Sufficiency of childcare – current supply**

Haringey has a diverse mix of provider types, with significant delivery coming from all major provider types – day nurseries, pre-schools, childminders, children's centres and maintained settings.

The majority of registered places available across the borough are for children aged under 5 years of age.

The number of registered childminders has reduced over the past five years by 19%. There were 279 childminders in 2010 and now there are 225.

In contrast, there has been an increase in the number of registered day nurseries, day care and pre-schools. Collectively these setting types accounted for 70 providers in 2010 and there are 92 on the childcare register in 2015.

The registered childcare database does not include any out of school provision. However, a number of primary schools are delivering childcare outside of school hours for children aged 5-10 years old.

Provision for children aged 11-14 years old is more likely to be out of school (in the form of clubs, activities and groups) that is delivered by schools, for their own pupils and for less than 2 hours. As such, it is not required to be registered as childcare. The extent to which such provision can be classed as 'childcare' to meet the sufficiency duty is a key question. After school activities provided by schools may be available for limited hours (e.g. 45 minutes to an hour and therefore be too short for formal registration) and subject to short term cancellation (for example, if a teacher is off sick or is required elsewhere and therefore not be reliable enough to support parent/carers to work).

There are relatively high levels of vacancies in registered provision across the borough, which supports a notion of general sufficiency of childcare. However, there are concerns regarding affordability which may be acting as a real barrier to access for many families (see below). There are also high numbers of children on waiting lists. In particular, children's centres have indicated they have large numbers of children on waiting lists for childcare.

Places for children under two years old are almost exclusively delivered by childminders and day nurseries.

Day nurseries deliver 712 places for 3 and 4 year olds – more than twice that of pre-schools. This might suggest that pre-schools might usefully consider extending their hours and weeks of opening to meet the demand currently met almost exclusively by day nurseries. Out of school hours provision for primary age children is predominantly delivered in the maintained sector with places available in childminding, in particular for children aged 5-10 years old.

There is very little childcare reported to be available at weekends; during the week, most settings are open by 7am and stay open until 6pm with differences in opening times within Network Learning Communities (NLCs).

Childcare capacity rates provide an overview of the number of places available per 100 children; this is a means of comparing the amount of childcare places available for different age ranges and between different localities. The highest capacity rate of places across the borough is for children aged three to four years old where there is a capacity rate of around 45% or one full-time place for just under half of all children in this age range. Capacity rates are relatively low for all age ranges and in particular for children aged under two years old and those aged over five years.

Haringey has six Network Learning Communities (NLCs) which are designed to take advantage and celebrate the diversity which exists in the borough's education system. Groups of schools work together in a supporting way forming learning networks in six areas: Harringay and West Green; Highgate and Muswell Hill; Hornsey and Stroud Green; North East Tottenham; South East Tottenham and; Wood Green. The six Network Learning Communities have been used as the base for sufficiency assessment.

There are differences in childcare capacity between Network Learning Communities (NLCs), and lower penetration rates are identified in general terms in South East Tottenham and Wood Green.

## **2.2 Use of childcare**

Use of childcare was highest amongst the 3-4 year old age range, reflecting the universal early years entitlement for this age range. Use of childcare was lowest for the youngest and oldest age ranges (under 2 years and 11-14 years). In general terms, households with the highest reported income were more likely to use childcare and childcare use was lowest for low income families (up to £16,200 a year).

A slightly lower percentage of non-working families used childcare (including family and friends) than working families – 76% of non-working families (105 survey respondents) vs 82% of working families (681 survey respondents), and 80% overall (802 survey respondents).

87% of parent/carers of a child with additional need were using, or had used, childcare (48 survey respondents).

Use of childminding is highest for the youngest age range of children – 20% of parent/carers with a child aged under two years using childcare, used a childminder for some or all of that care (53 survey respondents). Use of family members to provide childcare is relatively high across all age ranges but particularly for the youngest age range of children. Use of day nursery provision was high for the 2 year old and 3-4 year old age ranges.

Family and friends play an important role in childcare for older children (aged 5-10 years) and for the youngest age range (under 2 years old). This links to the provider audit which identifies relatively low levels of provision for these age ranges.

Where parents are not using childcare, many report this is through choice (39% of non childcare users, 78 survey respondents)), but the cost of childcare also plays an important part in decision making (identified by 26% of non childcare users, 52 survey respondents).

### **2.3 Assessment of demand**

The provider audit indicates both a high level of vacancies and a high number of children waiting to take-up a place, which is contradictory. The cost of childcare is identified as a real barrier to using formal childcare, or being able to use the amount of childcare needed.

The high number of vacancies across the borough and numbers on waiting lists suggest parents are seeking particular types of care, in particular areas and at particular times, or for a need for more information or brokerage. A high number of children are waiting for a place in Highgate and Muswell Hill, in most instances this is double the amount of other areas. Children who are in the age ranges 2 to 4 years make up the majority of those waiting for a place. This suggests a lack of sufficient early years education places available in areas and setting types that parents want.

There are strong indications of unmet need for the youngest age range of children (under 2 years of age) and for older children (school-aged, in particular 5-10 years of age).

There is also a lack of knowledge around out of school provision, as the provider database only lists childcare on the compulsory childcare register; the audit of providers which included all primary schools goes some way to addressing this lack of information, but intelligence is incomplete.

Taken in the round, findings suggest a sufficiency of childcare at borough level, but with barriers to access, primarily around cost and affordability. Findings also suggest provision is not necessarily in the areas or type of provision that parents say they want.

42% of survey respondents (337 respondents) using childcare indicated they needed more childcare in addition to that currently used which can be regarded as unmet need amongst current users. Parent survey responses identify unmet need for day nursery provision for children aged 0-2 years old and out of school provision for older children.

Consultations with stakeholders and specific community groups (including parents with a disabled child or child with additional needs) identify gaps in provision. These include:

- A lack of crèche provision (in particular free at the point of use) to support parents undertaking skills training (including English as an Additional Language)
- A lack of places for children aged 0-3 years old to support lone parents moving from Lone Parent benefit to Jobseekers Allowance
- A lack of provision outside of traditional working hours
- Affordable provision, particularly for those on low wages or seeking entry-level work

## **2.4 Childcare costs**

Childcare costs for nursery provision are higher in Haringey than found across London as a whole<sup>1</sup> (£302.56 in Haringey compared to £283.66 in London) and slightly lower for childminding (£256.81 vs. £269.44).

---

<sup>1</sup> Family and Childcare Trust Costs Survey 2015 and Haringey CSA provider audit data 2015



Costs of childcare are cited as barriers to use by parent/carers and by stakeholders consulted as part of the sufficiency assessment.

Just over half of childcare users (54%, 433 survey respondents) were satisfied with the cost of their childcare with higher income families more likely to be dissatisfied. Amongst all survey respondents, 53% (530 survey respondents) felt childcare costs were not reasonable.

According to Jobcentre Plus, better off calculations with lone parents often results in the client being potentially worse off, as a result of childcare costs. The Economic Development Service (driving development in the Tottenham area) highlight for many jobs, pay is either at minimum wage (currently £6.50 per hour for an adult aged over 22 years) or opportunities are for an apprentice where pay is £2.73 an hour. This means formal childcare is unaffordable for many entering employment.

## **2.5 Meeting the needs of a diverse community**

The population is highly diverse, with a relatively high proportion of residents born overseas. This brings particular challenges as some community groups (e.g. Eastern European) have different cultures of childcare and may not choose to engage in early learning for children aged 2, 3 and 4 years old. Stakeholders working with community groups (e.g. Eastern European and Orthodox Jewish communities) identify a preference for provision that reflects the culture (and language) of the community.

## **2.6 Childcare for disabled children and children with additional needs**

According to the parent/carer survey, 87% of parents caring for a disabled child or child with additional needs used childcare, slightly higher than the average of 80% for all parents. Consultations with parents and stakeholders identified a number of issues relating to provision for disabled children and children with additional needs.

Parents often report working is not possible with the demands of caring for a disabled child or child with additional needs and that childcare fulfils a number of needs including respite for the parent/carer and family and socialisation for the child.

Parents express a lack of confidence in providers' ability to care for their child, questioning levels of training and experience to care for children with additional, and sometimes complex, needs. Parents also report providers' reluctance to work with disabled children and children with additional needs, some of whom require 1:1 support, or may have behavioural challenges.

A lack of 1: 1 support and transport can act as a barrier to children with additional needs using available provision and a lack of information is cited as a barrier to identifying where suitable provision might exist. Costs of available provision are also identified as a barrier to use.

## **2.7 Early learning for 2, 3 and 4 year olds**

All 3 and 4 year olds and 40% of all 2 year olds nationally are entitled to a free early learning and childcare place for 570 hours a year.

Take up of the universal entitlement to 570 hours free early learning for children aged 3 and 4 years of age has increased in Haringey from 84% in 2011 to 91% in January 2015. This is higher than the London average of 90% and lower than the average of 96% for England.

As at June 2015 Haringey were funding circa 48% of children eligible for free early learning for children aged 2 years old, compared to take-up rates in London of 51% and 63% in England.

Parent survey responses identify a high level of awareness of the 3 and 4 year old entitlement (97%) with 80% of parents with a child in the relevant age range aware of the 2 year old entitlement.

### **2.7.1 Quality of early years provision**

Quality in early years settings in Haringey shows a five year upward trajectory, against a backdrop of an expanding market. For example, in 2011 57% of PVI settings were rated by Ofsted as good or outstanding; by December 2014 this had increased to 80%. There are 10

schools receiving a separate EYFS judgement and of those, nine (90%) were rated by Ofsted as good or outstanding.

Childminding has also seen an increase in quality from 56% of childminders judged good or outstanding a few years ago to 73% now. Relatively few childminders (circa 30 out of 234) are delivering places for funded two year olds and there is reported low level of engagement with the 3 and 4 year old early learning entitlement. Reasons behind low engagement are not clear (possibly a lack of awareness or funding levels).

As at 31 August 2014 (Ofsted Dataview snap-shot data), 3% of all early years provision in Haringey were rated as outstanding by Ofsted. Nearly two-thirds of early years providers (62%) were rated as good, and 32% were rated as satisfactory/requires improvement. A very small percentage of early years providers (3%) were rated as inadequate.

Quality in early years, as rated by Ofsted, has been increasing. In 2011, 3% of early years providers were rated as outstanding and 54% as good. Whilst quality in early years settings has improved since 2011, the proportion of settings judged good and outstanding is below that found across London, and England as a whole.

Recent reported research (Nuffield Foundation May 2014<sup>2</sup>) identified a difference between quality of early years settings in more deprived areas compared to more affluent areas. Nationally, quality is lowest in providers serving disadvantaged areas and children. On average across England there is a difference of 14 percentage points between the proportion of settings rated as good or better in the least deprived areas (based on IDACI scores 2010) and the proportion of settings rated as good or better in the most deprived areas.

Across London there is also a 14 percentage point difference between the proportion of settings rated as good or better in the least deprived areas and the proportion of settings rated as good or better in the most deprived areas. In Haringey there is a large difference in

---

<sup>2</sup> Nuffield Foundation 'Quality and Inequality – Do three-and-four-year-olds in deprived areas experience lower quality early years provision? [www.nuffieldfoundation.org](http://www.nuffieldfoundation.org)

terms of the proportion of early years settings rated good or better in areas of relative advantage and disadvantage (100% in least deprived areas and 67% in most deprived areas – Ofsted Dataview August 2014).

## **2.8 Sufficiency looking ahead**

There are a number of initiatives and policy directives increasing demand for childcare nationally, and in Haringey. This includes changes to employment opportunities, the extension of the early learning entitlement for three and four year olds and changes to benefits.

### **2.8.1 Employment and housing growth**

Employment is changing in Haringey; 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 (for example, between 9am and 5pm Monday to Friday) with more fluid, flexible patterns of work including shift work, weekends, working more than one part-time job, early morning and evenings. Currently there is limited registered childcare provision available before 7am, in the early evening, or at weekends. Whilst there are no indication currently this is creating a barrier to work, or presenting a gap in childcare provision, if the employment markets continues to change, demand for childcare pre 7am, in the evening and at weekends may increase and childcare needs to be flexible to meet changing patterns and there needs to be continued work with employers to support flexible hours/term-time working etc.

Haringey's Development Plan forecasts growth of 12,000 jobs in Haringey, the bulk of which are expected to be provided in the Tottenham area.

Haringey's Strategic Policy SP1 (as revised) provides a commitment to deliver at least 19,802 new additional homes in the borough over the fifteen year period 2011/12 to 2025/26. The Tottenham area is expected to deliver over 11,000 new homes between 2011-2026. The

Tottenham area covers the wards of Northumberland Park, Tottenham Hales and Tottenham Green and parts of the wards of Bruce Grove, St Ann's and Seven Sisters.

### **2.8.2 Benefit changes**

Changes to benefit conditionality means that most lone parents receiving income support are now transferred to job seekers allowance when their child reaches the age of 5 years. Lone parents are expected to seek work to receive the benefit and therefore require childcare from at least this age. This increases demand for childcare, especially for school aged children.

The introduction of Universal Credit will also impact on families and whilst arrangements are unclear it is possible people will be required to work more hours (currently 16 under Jobseekers Allowance) which would increase demand for childcare.

### **2.8.3 Expansion of the three and four year old early learning entitlement**

The Government has announced plans (May 2015) to increase the three and four year old early learning entitlement from 15 hours a week to 30 hours a week for working parents, from 2017. Details are not yet confirmed, however, the introduction of the expanded entitlement may increase demand for childcare, and impact on the childcare market.

## **3 Recommendations**

### **3.1 Support for the cost of childcare**

It is important all stakeholders (including those working with job seekers and parents studying or training) are aware of the early years entitlements and support for childcare costs through the childcare element of Working Tax Credits and Universal Credits. Information should be updated as new policies are introduced (e.g. Tax Free Childcare and 30 hours free early years funding for 3 and 4 year olds being introduced by Government in 2017). Regular briefings and re-briefings are key, as team memberships churn.

Information provided to stakeholders should include eligibility criteria (where appropriate), how the support is delivered and how and where to access childcare. Stakeholders should ensure information is routinely shared with families, ensuring positive messaging and support for all aspects of the childcare market including childminders, group-based childcare and schools.

Parent/carers can claim the childcare element of Working Tax Credit to support the cost of registered childcare, including providers on the voluntary part of the General Childcare Register. Any provider delivering childcare for children aged 8 years old or over should be encouraged to join the voluntary part of the General Childcare Register so parents/carers can access this support for costs. This includes maintained schools. This will also support the council to develop a directory of childcare providers for older children and will help meet potential new information duties as part of the current Childcare Bill.

### **3.2 Information and brokerage**

There is a need for a centralised information service that works with providers to collate places and vacancy data, provides information and guidance, and supports parents seeking childcare. Brokerage (supporting parents to meet childcare needs by identifying and promoting available provision) is a de-centralised function, involving key partners including Jobcentre Plus, children's centres and others.

Findings suggest a lack of provision for younger children (aged under 2 years old) and out of school provision for children aged 5-10 years old, however providers report vacancies which supports a need to review and strengthen the Family Information Service (FIS) function to ensure effective brokerage of vacancies to meet need.

Information about childcare providers and up to date childcare vacancies should be clearly available on the Family Information Service Directory (including information about providers with training and experience working with disabled children and children with additional needs). IT solutions may be available to offer real time vacancy information.

Parents may require support to access provision (brokerage support) which should be available through the Family Information Service (FIS) and for pre-school children, children's centres with links to local providers. Brokerage should support directing parents and carers needing childcare to providers that have vacancies. Effective partnerships and links between children's centres and early years providers should be part of a central and coordinated strategy, accountable to the LA sufficiency duty.

It is recommended links are made with Jobcentre Plus (and other agencies supporting employment) to providers with vacancies, to meet demand for childcare for those seeking or taking up employment.

Parent/carers with a disabled child or child with additional needs require more specific information about the knowledge and experience of potential childcarers, to satisfy their concerns regarding appropriate care. This should be included in the Family Information Service Directory and held by key stakeholders to support parents to access appropriate provision. The promotion of good news stories and case studies would also support the growing of parents' confidence.

The availability of information and guidance should be promoted widely to ensure parent/carers are aware of it and know how to access it. This is best done through digital marketing linking to online information and checking services, supported by outreach and frontline partners' case work.

### **3.3 Supporting take-up of free early learning for two year olds**

There is a need to increase demand and take-up of the two year old early learning entitlement and to match demand to existing provision. Brokerage and outreach should be reviewed including support through children's centres to maximise reach and take-up amongst eligible families. Marketing and communication should aim to create and maintain high levels of general awareness of the entitlement, and target specific groups or communities where take-up is lowest. Marketing and communications should include social media as well as the more traditional forms of promotion. An on-line eligibility checking system allowing families to self-serve would also support increased take-up.

All key stakeholders (including Adult Learning, children's centres, Jobcentre Plus, regeneration, Health and Social Care) should have detail of the entitlement, eligibility criteria and how families can access a place, to maximise reach and engagement.

Providers registered to deliver funded early years provision should be supported to promote vacancies to eligible families seeking a place.

### **3.4 Availability**

There is a potentially growing need for childcare outside of traditional hours (Monday-Friday, 8am – 6pm), including early starts evenings and weekends, as well as a current need for crèche provision to support parents training or studying to increase employability. Current providers may be in a position to deliver more flexibly to meet this need but require support to do so. This should be a top priority.

Regeneration and other development plans should include an assessment of childcare needs to ensure sufficient childcare provision to meet the needs of workers and housing growth. There is a need for a coordinated approach to place development to meet existing unmet need and future demand.

There is current unmet need for provision for young children (aged under two years old) and for older children (school-aged). Improved information and brokerage may resolve at least part of the identified gaps, however, it is likely more places will be required.

Recommendations to support capacity development and availability:

- For disabled children and children with additional needs, review school transport to identify where changes could be made so that a child can access out of school childcare. Additional support (e.g. 1:1 support) may also be required to support inclusion



- Fully explore partnership models of delivery to maximise flexibility and choice. For example, childminders working in partnership with schools and group-based providers
- Support current providers to increase flexible delivery to maximise occupancy and space
- Explore re-modelling and expansion with providers with waiting lists as a way of meeting the needs of more families through existing provision
- Encourage over-subscribed providers to set up additional provision under the same banner and name
- Require schools to identify out of school childcare provision for inclusion on the voluntary part of the General Childcare Register
- Develop data collection and management systems that support accurate knowledge of vacancies to support brokerage and to inform parents looking for childcare. Data management systems should also identify areas of unmet need to inform place development strategies
- Support and encourage childminders to offer the free early years entitlements and develop marketing to promote childminding to parents and carers
- To increase crèche provision, explore links between early entitlement providers and courses to align course times to provision times

### **3.5 Quality of early years provision**

Support to increase the quality of early years provision should continue to be targeted to more deprived areas to narrow the gap between the proportion of settings rated good or better in areas of relative affluence and disadvantage.