

APPENDIX A –

Childcare Sufficiency Assessment 2015/16

London Borough of Barnet

Early Years Team, March 2016

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1. Executive Summary

Following the Childcare Act 2006 all local authorities are under a statutory duty to secure sufficient childcare, so far as reasonably practicable, for parents of children aged 0-14 years (up to 18 for disabled children) who are working, studying or in training in their local area. Statutory guidance recommends that there is an annual report to elected council members on how the Council is meeting its duty to secure sufficient childcare, and to make this report available and accessible to parents¹.

This Childcare Sufficiency Assessment (CSA) has used both qualitative and quantitative methodologies to explore childcare sufficiency in LB Barnet. Supply issues have been identified by undertaking an analysis of provider data using Tribal and supported by a survey of 196 childcare providers. Demand issues were identified by undertaking a survey of 259 parents and the analysis of completed online questionnaires, as well as parent one to ones with hard to reach groups. An analysis of the gaps in the market was undertaken by mapping supply to demand and identifying gaps in provision.

Geographically, children's services in LB Barnet are planned and delivered across three localities (East Central, West, and South). However, these localities cut across ward boundaries and are comprised of a number of Lower Super Output Areas (LSOAs). For the purpose of this CSA we have reported on ward level data. It is important to note that the data used in this CSA has come from a range of sources; population data has been based on the Greater London Authority population estimates for 2014. Other data is gathered from the LB Barnet's internal childcare data collection tool, Tribal², Schools Census (EYSFP, 2015), Early Years Census (2015), DWP Data and Analytics (2014), and Indices of Multiple Deprivation (2014). In addition to this, data is collected over different time periods as data is released at varying frequency.

Barnet is one of the largest boroughs in London, and the population is set to grow further in the next ten years, with regeneration projects in progress and an increase in new homes and jobs. According to Greater London Authority population estimates for 2014, 0-14 year olds make up around 26% of the total population in Barnet. The demand for childcare in Barnet is growing, and around 60% of all parents surveyed said that they had used some form of childcare in the past twelve months, compared to 79% of parents across England³. Out of this, 73% said their main reason for using childcare to find work or to remain in employment. 43% of respondents felt that their child benefitted socially from attending a nursery setting.

In terms of childcare, there is a wide range of provision in the borough, and currently there are 849 domestic and non-domestic childcare settings available. Childminders are the most commonly used form of childcare in Barnet, followed by the PVI sector. Although the borough is

¹ The Children and Families Act 2014 repealed Local Authorities' legal duty to assess the sufficiency of childcare provision. However, The Early Education Statutory Guidance 2014 states that all local authorities are responsible for securing sufficient childcare, so far as is reasonably practicable, for working parents, or parents who are studying or training for employment, for children aged 0-14 (or up to 25 for disabled children), and to secure sufficient childcare places, local authorities should take into account what is 'reasonably practicable' when assessing what sufficient childcare means in their area.

² Tribal, February 2016 download

³ Parents surveyed in the most recent term time week. Data take from the Statistical First Release 09/2016, 3 March 2016 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/504693/SFR09-2016_Childcare_and_Early_Years_Survey_of_Parents_2014-15_SFR.pdf

mostly affluent with a relatively sufficient number of childcare providers, there are pockets of deprivation where childcare is not being accessed, either because it is not seen as a being a significant part of early childhood development due to ideological or cultural reasons, or there is a genuine shortfall in places due to a rapidly increasing population of 0-4 year olds. Overall, Barnet has relatively low levels of deprivation compared to the national picture. Based on the IMD 2015, only two out of 211 Lower Super Output Areas in Barnet are amongst 10% the most deprived, 18 amongst the 20% most deprived and 39 amongst the 30% most deprived.

A number of **key findings** have emerged from this research:

- Although the majority of parents in Barnet felt they knew about the entitlement to free early education, around 10% of parents felt that there they find it difficult to gain information about what provision was available and this prevented them from accessing childcare. However, this is still comparatively lower than the national average, where around 32% of parents feel that there was too little information about childcare in their area⁴.
- Burnt Oak and Colindale remains in the bottom 20% according to the IMD, and has the lowest number of eligible 2 year olds accessing the free entitlement to early education due to a shortage of places and some underlying engagement issues with Jewish families in the Golders Green area due to reasons of culture.
- The largest population of 0-4 year olds is in Burnt Oak, Colindale, and Golders Green, with Colindale in particular to experience a spike in its population over the next three years due to current regeneration work. It is estimated that around 5,420 affordable housing will be created, adding pressure to a community which has already has an existing shortage of childcare.
- Whilst 89% of providers were familiar with the planned increase in an additional 15 hours for three and four year olds from working families, only 45% of PVIs expect to offer additional sessions. Providers cited a number of reasons for not intending to increase the provision, which includes the funding rate, capacity to deliver and staffing.
- From the survey we found that most parents and carers would like additional childcare, especially out of school childcare such as holiday clubs and afterschool care; however parents cited that they did not know where to look for information on childcare providers and often relied on recommendations from friends and family.
- Currently 2.6% of two year olds in Barnet receive SEN support, this is in contrast to 2.8% nationally. 5.1% of three and four year olds in Barnet currently access some form of SEN support compared to 6.1% of the four and three year old population nationally⁵. Although all childcare providers should have Special Educational Needs support in place, we found that parents who took part in the survey felt that there should be more clarity

⁴ Statistical First Release 09/2016, 3 March 2016

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/504693/SFR09-2016_Childcare_and_Early_Years_Survey_of_Parents_2014-15_SFR.pdf

⁵ Education provision: Children under 5 years of age, January 2015:

<https://www.gov.uk/government/statistics/provision-for-children-under-5-years-of-age-january-2015>

about the childcare offer for children with special educational needs and the additional support on offer.

In light of these key findings, this CSA makes the following **recommendations**:

- Improve LB Barnet's childcare information so that parents are able to access better information about childcare in their area and data collection both internally and externally. LB Barnet is in the process of rolling out a new Provider Portal which will capture live information about childcare providers and vacancies. This will be linked to the LB Barnet web site, giving greater transparency of local childcare services to parents.
- Work closely with a particular sub-set of hard to reach groups identified in this report to access the two year old offer. In particular to create a new Strategy and Engagement Plan to identify specific barriers in accessing services by particular groups and create a targeted action plan of support to increase take-up.
- Plan for the impending demand for additional childcare in areas where regeneration work is currently taking place, actively promoting the creation of new childcare provision in Colindale and Burnt Oak, where there is a current shortfall in childcare and where there is predicted to be a higher demand for places.
- Work closely with PVIs to explore opportunities to expand provision for the forthcoming childcare policy to provide an additional free 15 hours for 3 and 4 year old children in working families, and increasing out of school childcare. This will include creating a clear Strategy to respond to the demands placed on the childcare system in Barnet by the additional 15 hours childcare for working families.
- Work with schools to look for opportunities to further develop the role they play in providing early years services, and addressing the shortage of out of school childcare provision.
- Develop a robust system to ensure the childcare needs of children and young people with special educational needs and disabilities are met and to promote the additional support on offer by childcare providers for children with special educational needs.

2. Introduction

This Childcare and Sufficiency Assessment provides a comprehensive review of the childcare market in the London Borough of Barnet in 2015. This includes an analysis of the supply and demand of childcare provision in the borough and how local parents' childcare needs are being met.

The previous full and comprehensive CSA was undertaken and published by LBB in 2013 and elements from the 2013 assessment have been researched and considered when drafting this document; this includes:

- **Demographic make-up:** Current and projected demographics with regard to the population(s) of 0 – 14 year olds (and up to 25 for children with SEND)
- **Childcare market:** Analysis of the current childcare supply and demand in Barnet
- **Parental demand:** Feedback from parents on childcare across the borough as a whole, in relation to childcare needs and future improvement
- **Provider input:** Feedback from daycare providers and childminders on the 'childcare market' in Barnet
- **Gap analysis:** Quantifying and qualifying the scale and extent of existing and/or continuing gaps with regard to childcare provision within the borough.

In the last CSA there were a number of demographic challenges reported which included a large projected population growth in the next years placing increased pressure on childcare provision and other services. Some of Barnet's areas of severest deprivation contain the highest numbers of births, and it was expected that this would lead to higher demand for services in these areas. We have considered this as part of our research.

3. Methodology

The research that has informed this CSA was conducted during the period November 2015 – January 2016. The following types of research were undertaken:

3.1 Desk research

3.1.1 Identification of key demographic and socio-economic issues

Desk research was undertaken in order to identify demographic and socio-economic factors which will have a *discernible influence* on the (sufficiency of and suitability of) existing and future provision of childcare throughout Barnet:

- Existing population of 0 – 14 year olds (and up to 25 SEND)
- Planned and proposed local regeneration initiatives
- Ethnicity and language of families and children aged 0 – 5 years
- Data on children with special needs and disabilities resident in the borough
- Data on families in out of work benefits
- Data on lone parent families
- Data on child poverty and deprivation

3.1.2 Identification of the supply of childcare in Barnet

The number of places accessible to parents and the availability of the following types of childcare provision were identified using the LB Barnet childcare data collection tool, *Tribal* and Early Years Census data. We examined the following information:

- Day nurseries and pre-schools (sessional childcare providers)
- Independent sector nursery schools
- Maintained school nursery classes⁶
- Nursery schools
- Out of school childcare providers
- Childminders⁷

We also undertook analysis of data from the most recent Census data to establish the number of grant-funded and fee paying children in PVI setting⁸. Part of this analysis was conducted using information we hold from Spring 2016 Headcount data, and some of this information was obtained from provider telephone interviews.

3.2 Field research

3.2.1 Parental demand face-to-face questionnaire and on-line survey

During December 2015 – January 2016 259 respondents completed an online questionnaire. The data collected was cross-borough in order to preserve the anonymity of parents and their answers. The online survey sought a combination of quantitative and qualitative responses from interviewees about subjects and issues including:

- Use of childcare
- Type of childcare (including informal and formal means)

⁶ Data taken from LB Barnet Early Years Census, 2015

⁷ Data taken from Tribal, February 2016, some childminders were registered and others are unknown.

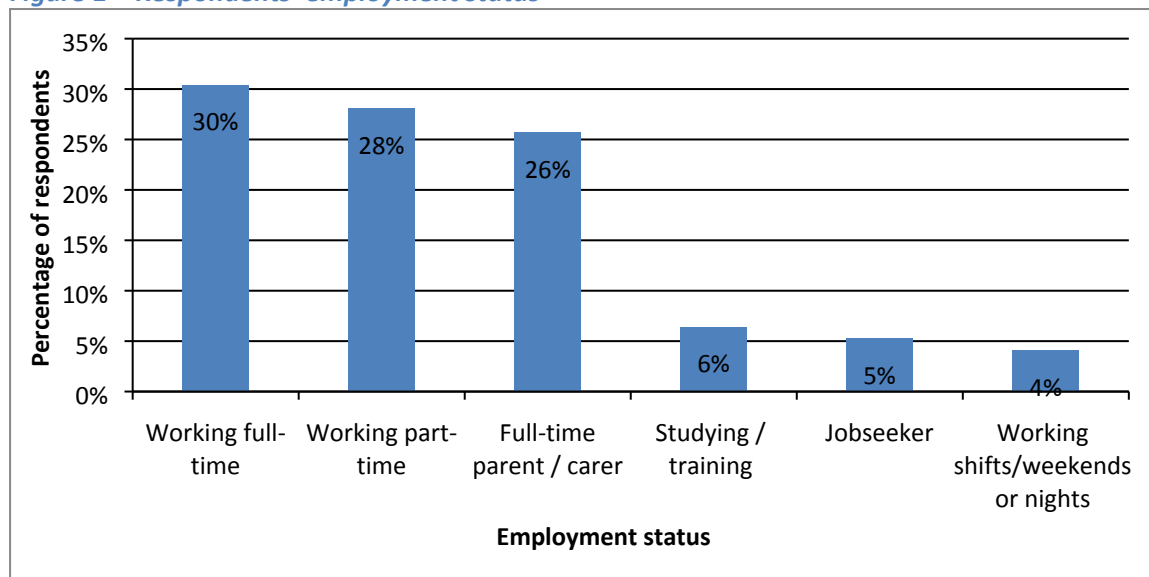
⁸ Data taken from Early Years Census, Spring 2016

- Free Entitlement to Early Education for three and four year olds
- Free Entitlement to Early Education for eligible two olds
- Barriers to using childcare (quality, safety)
- Demand for childcare (timings, sessions, special educational needs and disabilities, out of school, holiday clubs)

The vast majority were aged between 25 and 44 (92%) and female (88%). 25% of respondents had sole responsibility for their child(ren). 15% were either pregnant or on maternity leave. 58% of respondents were either working full time or part time and 26% were full time parents or carers. 5% described themselves as disabled.

The highest number of respondents were in paid employment either full or part-time, with 4% working either shifts, weekends or nights. 26% were full-time parents. 6% were currently studying or training, and 5% were jobseekers.

Figure 1 – Respondents’ employment status



In addition to this parent one-to-ones were conducted between December 2015 - January 2016 at the London Jewish Family Centre and the following children’s centres:

- Barnfield
- Wingfield
- Parkfield & The Hyde
- Newstead
- Coppetts Wood

2.2.2 Online and Telephone survey with childcare providers and childminders

During January 2016 a telephone survey was undertaken with childcare providers and childminders operating throughout Barnet.

A standard format of semi-structured interview questions invited childcare providers and childminders to feedback on issues including:

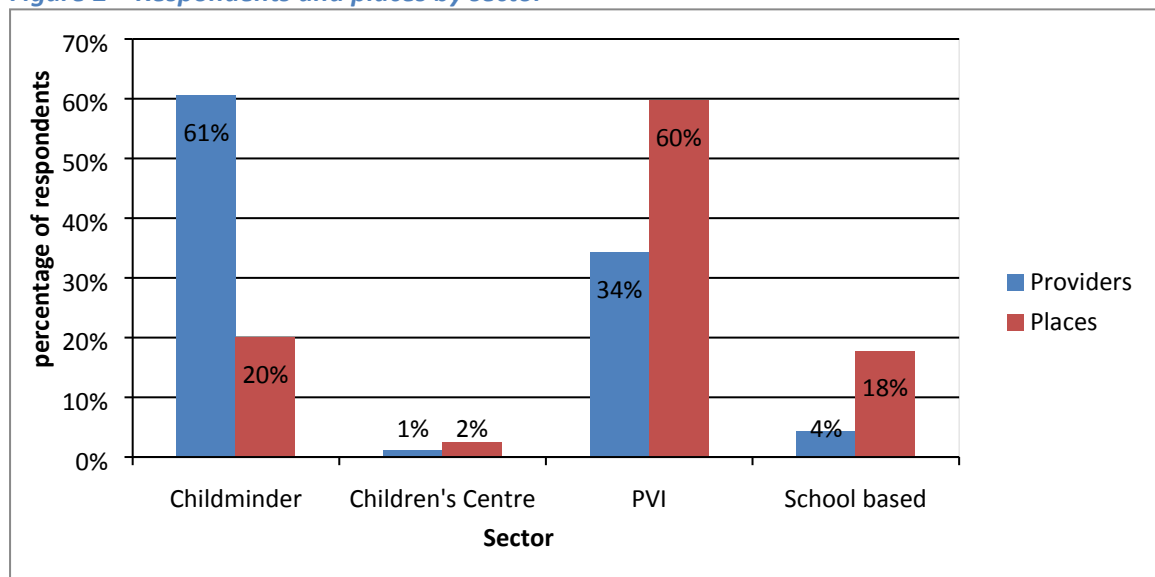
- Sector, location, type, cost, Ofsted judgement

- Childcare places (including provision for children with SEN)
- Vacancies
- Free Entitlement to Early Education for three and four year olds
- Free Entitlement to Early Education for eligible two year olds
- The Childcare Business and potential expansion under the additional 15 hours for working parents

Responses were collated from a total of 196 childcare providers, providing 3,142 childcare places, of whom,

- 61% were childminders. The majority of childminders provided full daycare, but a small number (3%) only provided sessional care. As childcare providers are typically registered for five places or fewer⁹, they accounted for only 20% of registered childcare places
- 34% were PVI childcare settings – mainly offering full daycare, but some offering sessional care only. PVI nurseries accounted for 60% of all registered places
- 1% were Children’s centre settings, accounting for 2% of registered places¹⁰
- 4% were school-based childcare, accounting for 18% of registered places

Figure 2 – Respondents and places by sector



Respondents were asked for their postcode, from which ward and locality were assessed.

- 52% of respondents, offering 45% of registered places were located in East Central locality
- 21% of providers, offering 29% of registered places, were located in South locality
- 27% of providers, offering 26% of registered places, were located in West locality

⁹ A childminder may care for a maximum of six children under the age of 8. Of these, a maximum of three may be under five, and no more than two may be under 18 months of age.

¹⁰ This figure is based on the number of children’s centres who responded as part of the survey and does not reflect the actual number of children in children’s centres accessing a childcare place which can be seen in Figure 5 and Figure 9.

In addition to this, we used data from a separate piece of research to inform our understanding of whether PVIs were likely to expand under the forthcoming extension to childcare. This short study sought views from PVI settings only. Two types of research were undertaken:

- Telephone interviews with PVIs for three weeks from 22 February – 14 March 2016
- Analysis of Census data to establish number of grant funded and fee paying children in PVI settings

We contacted 182 settings to take part in a short survey about increased provision. Out of this, 89 settings responded. We asked a combination of qualitative and quantitative responses, which included:

- Provision session timings
- Knowledge of the planned 15 hour increase in childcare for working families
- Capacity to deliver
- Type of support required to deliver additional provision
- Why providers would not increase their hours
- Number of Free Early Education Grant paying children
- Number of Fee paying children

4. Context

4.1 National & Local Priorities

Barnet is London's most populous borough and is set to grow significantly over the next 10 years. According to GLA estimates, there are currently 391,500 people living in Barnet. One of the biggest challenges for Barnet has been the take up of the free entitlement to early education for disadvantaged two year olds. This has posed a particular challenge to LB Barnet due to lack of engagement with parents and demand, this has been coupled with a surge in population within some of the most deprived parts of Barnet, and a shortfall in places¹¹. However, Barnet is now responding to this challenge by introducing a new brokerage model and strategy for engagement with eligible families and we are looking to increase our provision of places through direct work with Children's Centres and PVI settings in areas where the need for places is at its greatest.

In recent months Barnet has also undergone considerable changes to its early years and childcare implementation model, this has included:

- Review of the early years team and a new structure in place
- Locality model adopted for Children's Centres (from four, to three localities; East Central, South, and West)
- Working with PVIs to consider ways to increase capacity for the two year old offer, and free early education for three and four year olds.

In addition to this, other changes that will affect early education and childcare in Barnet will be the forthcoming policy around the introduction of 30 hours of free childcare for three and four year old children in working families, the introduction of the new tax-free childcare offer and the funding reviews.

4.2 Deprivation

Generally affluent, Barnet is suburban in nature, with pockets of deprivation. Barnet has 21 wards and 211 lower super output areas (LSOAs). Overall, 9% of Barnet's LSOAs fall within the bottom 20% most deprived areas (see Table 1, below).

At 6.9% Barnet has low unemployment rates. The local economy is dominated by micro businesses, and there is evidence of health and education sector growth; and of a recent resurgence in the construction and property sector associated with the Council's regeneration programme. However, there are persistent pockets of deprivation located along the west side of the Borough, which Barnet Council is currently seeking to improve through regeneration activities in these areas; and the targeted work of the Skills, Employment, and Enterprise programme.

Below is a list of Barnet's most deprived areas as ranked against the IMD 2015, which provides a relative measure of deprivation at lower super output areas across England. Areas are ranked from least deprived to most deprived on seven different dimensions of deprivation and an overall composite measure of multiple deprivation, these include; income; employment; health and disability; education; crime; barriers to housing and services; and living environment deprivation rated against multiple deprivation indicators.

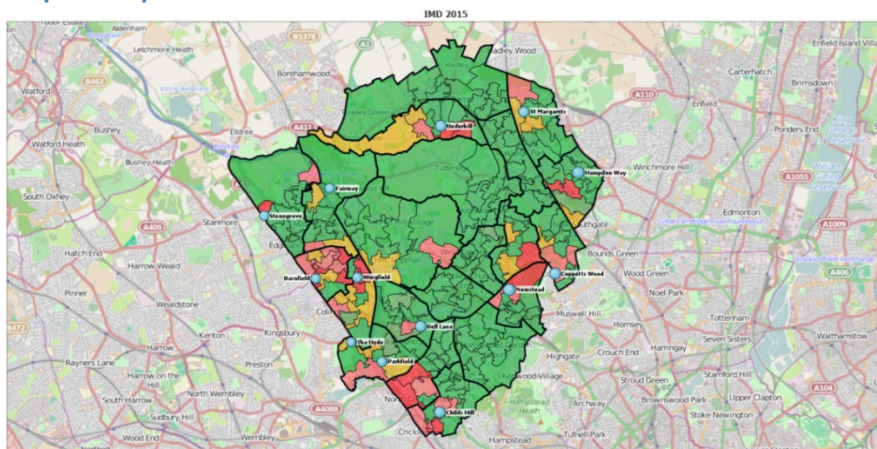
¹¹ See Table 7, Annex A

Figure 3 – Percentage of ward with LSOAs in bottom 20% IMD¹²

Ward	% of bottom 20% IMD
Brunswick Park	10%
Burnt Oak	30%
Childs Hill	17%
Colindale	40%
Coppetts	0%
East Barnet	0%
East Finchley	10%
Edgware	10%
Finchley	
Church End	0%
Garden Suburb	0%
Golders Green	18%
Hale	0%
Hendon	0%
High Barnet	0%
Mill Hill	0%
Oakleigh	0%
Totteridge	0%
Underhill	20%
West Finchley	0%
West Hendon	10%
Woodhouse	10%
Total	9%

According to the 2013 CSA Colindale and Burnt Oak had the highest proportion of 0-4 year olds and also faced large gaps in childcare provision and were thought to have the biggest growth in 0-4 year old children until 2023¹³. From the table above we can see that the areas with the highest levels of deprivation are in Colindale, Burnt Oak, and Underhill.

Map 1 – Deprivation based on the IMD 2015



¹² IMD 2015 English Indices of Deprivation, <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2015>

¹³ Barnet CSA 2013

4.3 Regeneration

Barnet is currently undergoing extensive regeneration; with challenging new housing targets that hopes to deliver 28,000 new homes between 2011 – 2026. Over half of these new houses will be located in the areas of Grahame Park (Colindale), Stonegrove, and West Hendon. The Barnet Regeneration programme hopes to create between 5000-6000 new jobs and over 15,000 new homes; which means that even more people than before will have the opportunity to live and work in an already densely populated borough¹⁴.

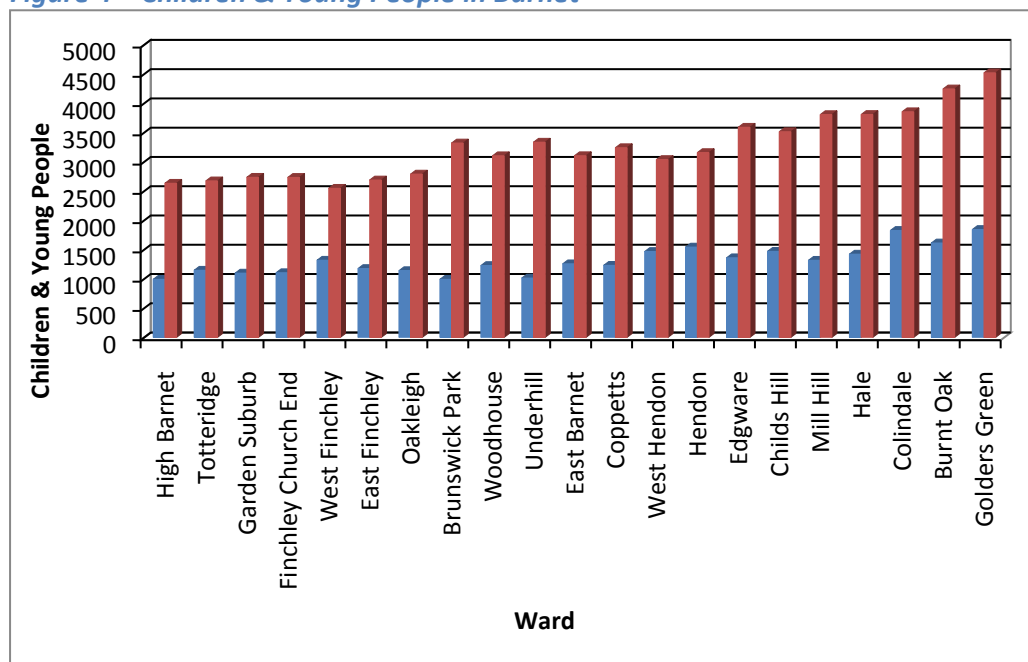
4.4 Barnet Demographics

According to Greater London Authority population estimates for 2014, there are a total of 374,915 people living in Barnet. Out of this, 27,538 are 0-4 year olds, and 68,417 are aged 5-14. Of the total population, 0-14 year olds make up around 26% of the total population.

0-4 year olds make up 7% of Barnet’s population and the highest proportion of children aged 0-4 are located in Golders Green, Colindale, and Burnt Oak. The smallest population of children aged 0-4 is located in Brunswick Park and High Barnet. 5-14 year olds make up 18% of the total population, and these are mostly located in Hendon, Burnt Oak, Colindale and Golders Green are areas where the largest population of 5-19 year olds currently live¹⁵.

Over the next few years, Colindale will see a surge in population, with a greater number of jobs and housing in the area. There will therefore be greater pressure points on childcare in the area.

Figure 4 – Children & Young People in Barnet



¹⁴ London Borough of Barnet Regeneration Plan 2015

¹⁵ GLA Population Estimates 2014, Refer to Table 1, Annex A,

4.4.1 BAME and EAL Children

The highest number of 2, 3 and 4 year olds is in Colindale, followed by Golders Green and Burnt Oak¹⁶. This population is expected to grow further until 2020. In terms of ethnicity, the highest proportion of BAME children is in Colindale, Burnt Oak, and West Hendon. EAL is also represented at its largest in these areas, as well as Childs Hill and Golders Green¹⁷.

4.4.2 Special Educational Needs

There are 7,501 children who are accessing SEN provision in Barnet, this includes known children in Reception up to year 14 and includes all children with a Statement, Education and Health Care Plan, or SEN support. The number of children accessing services in Colindale and Burnt Oak is highest, with East Barnet and Golders Green following suit. This indicates that a link between multiple deprivation and special educational needs.

4.4.3 Out of work benefits and lone parent families

In Barnet there are 5435 families with children aged between 0-4 who are on out of work benefits. The highest population of families who are on out of work benefits is based in Burnt Oak (48%), followed by Colindale (38%) and Childs Hill (34%). In addition to this, the number of lone parents is also at its highest in Burnt Oak (210) and Colindale (175)¹⁸.

¹⁶ For a detailed breakdown see Annex A, Table 2

¹⁷ Early Years Census Data, LB Barnet, See Annex A, Table 2

¹⁸ Data taken from DWP Data and Analytics, see Annex A, Table 4

5. Childcare Supply

According to LB Barnet's internal Tribal database, the number of childcare providers in the Borough has increased by 52% in 2015/3, from 408 to 849 since the 2013 CSA.. Out of this, there are 342 childminders, 395 settings in the Private, Voluntary and Independent Sector, 65 settings in the maintained sector, and 41 out of school care providers¹⁹.

There has also been a growth in the places available for childcare; in 2014 there were 8924 childcare places in Barnet. In 2015 this figure grew by almost 45% to 12444 childcare places.

5.1 Number of providers and places

The table below lists the type of childcare currently available by locality²⁰:

Figure 5 – Providers and Places

Total Provider Type	Total number of providers	% of providers	Total number of places	% of places
Childminders	342	40%	1270	10%
Independent Sector	59	7%	1717	14%
Private & Voluntary Sector	336	40%	4389	35%
Maintained Sector	71	8%	3113	25%
Out of School Care	41	5%	1955	16%
Total	849	100%	12444	100%

The majority of childcare places are provided by the PVI sector, with day nurseries and sessional preschools offering a greater number of places. This is followed by the maintained sector.

5.1.1 Number of places by ward and shortfall

The highest number of places have been filled in Burnt Oak due to the large proportion of under fives in the ward, however there is a clear shortfall in three and four year old places in Colindale where the population of 0-4 year olds makes up 7% of the total 0-4 population in Barnet²¹. The largest shortfall for two year old places is in Golders Green, which has a large Jewish population and anecdotal evidence suggests that this is a group which is particularly reluctant to take up the two year old offer due to cultural and religious reasons. Our one to one parent sessions which took place at the London Jewish Family Centre in Golders Green found that parents felt any nursery provision for their children would have to be Jewish.

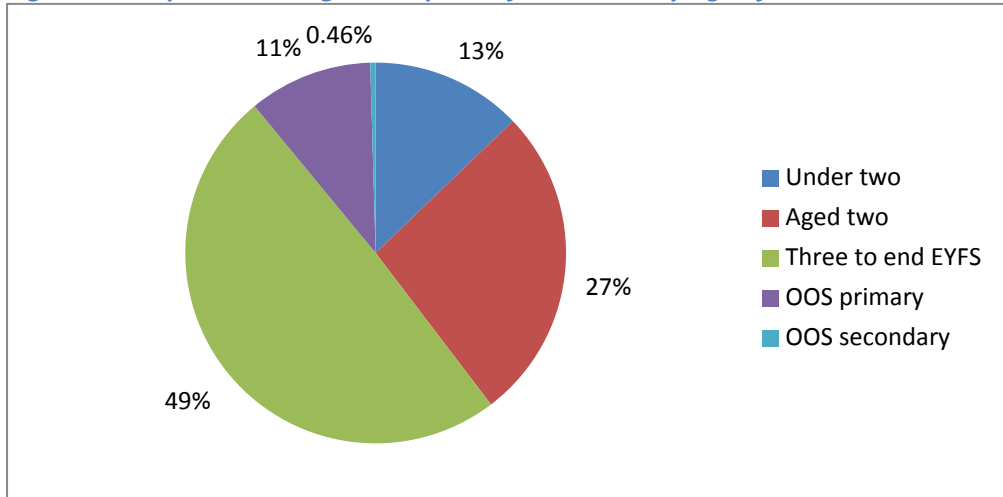
In terms of age groups of children who attended their settings, providers were asked how many children, and what age groups, they were registered to care for. Respondents had more registered places for three and four year olds than any other group, with 49% of all places available for this age group. The fewest number of places was for secondary school out of school care, with childminders offering 17 out of school secondary places.

¹⁹ The maintained sector excludes maintained nursery classes as individual settings.

²⁰ Data taken from LB Barnet, Tribal data system, February 2016 download and LB Barnet Early Years Census 2015 data

²¹ See Table 7, Annex A. NB: This data cannot be broken down per age due to restrictions of the Tribal system.

Figure 6– Respondents’ registered places for children by age of child



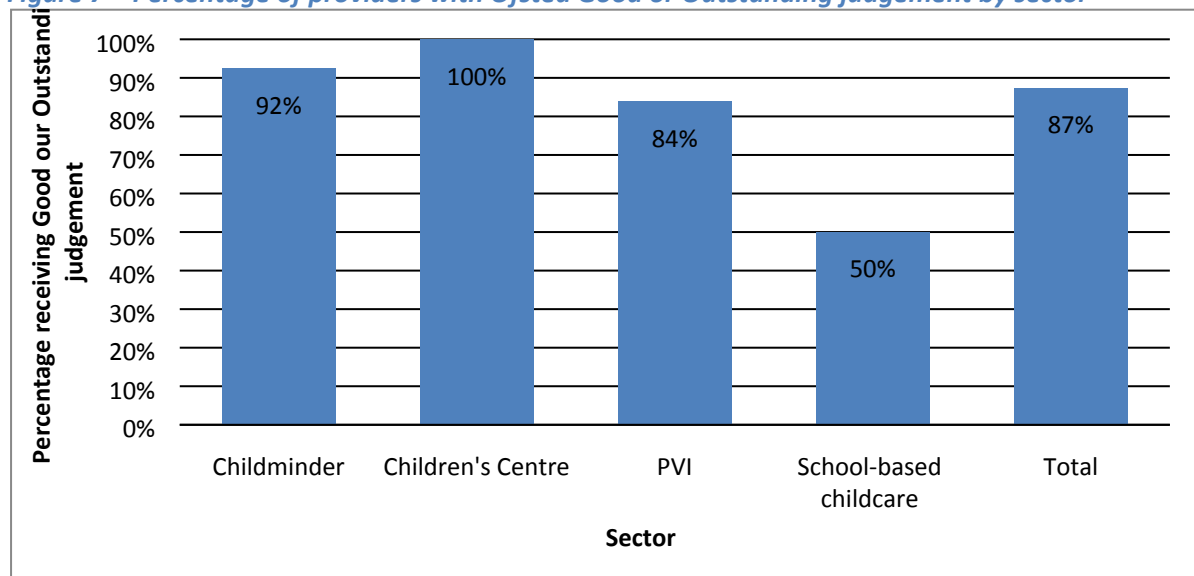
5.2 Cost

Respondents were asked about their hourly, daily and sessional charges. However, a number of respondents reported the same amount for all three categories, leading to lack of confidence in the results. Most providers appeared to charge between £5.00/hour to £17.00/hour, with an average price of £6.50/per hour.

5.3 Ofsted judgements

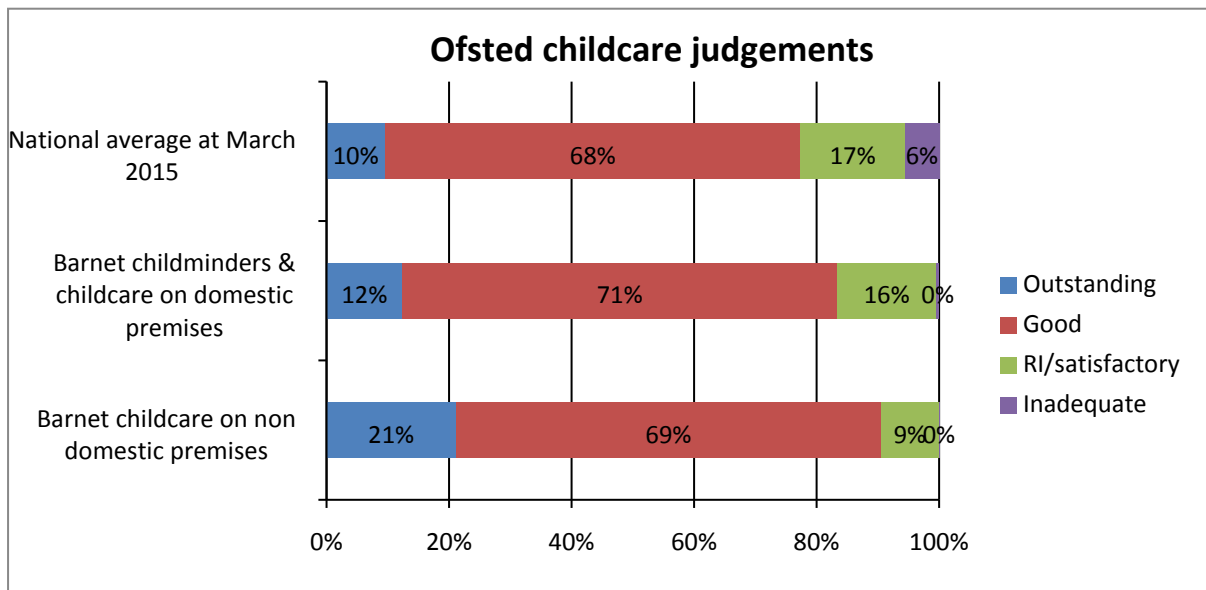
159 providers²² (81% of the sample) provided information on their most recent Ofsted judgement. Overall, 87% of these providers had received a Good or Outstanding judgement at their last inspection. It is important to note that results from Children’s Centres is derived from just two Centres, and is not representative of all Centres.

Figure 7 – Percentage of providers with Ofsted Good or Outstanding judgement by sector



²² Providers that did not provide this information were often new and had not yet been inspected

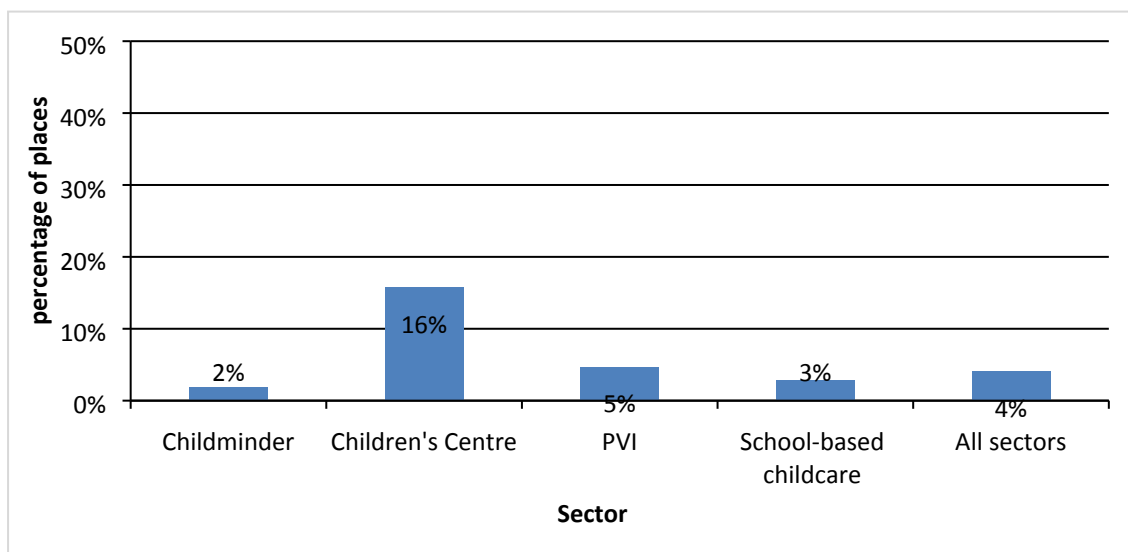
Nationally, Barnet is performing above average in terms of good and outstanding childcare providers²³, which currently stands at 78%. In Barnet, 90% of childcare providers on non-domestic premises are good or outstanding, compared to 85% nationally; whilst 83% of childminders and childcare providers on domestic premises are good or outstanding.



5.4 Special Educational Needs (SEN)

In Barnet 2.6% of two year olds receive SEN support; this is in contrast to 2.8% nationally. 5.1% of three and four year olds in Barnet currently access some form of SEN support compared to 6.1% of the four and three year old population nationally²⁴. From our provider survey, we found that 4% of all children were considered to have special needs, with 16% of those accessing Children’s Centres having special needs, but just 2% of those attending childminders.

Figure 8 - Percentage of children with Special Needs



²³ Data taken from LB Barnet’s Tribal System

²⁴ Education provision: Children under 5 years of age, January 2015:

<https://www.gov.uk/government/statistics/provision-for-children-under-5-years-of-age-january-2015>

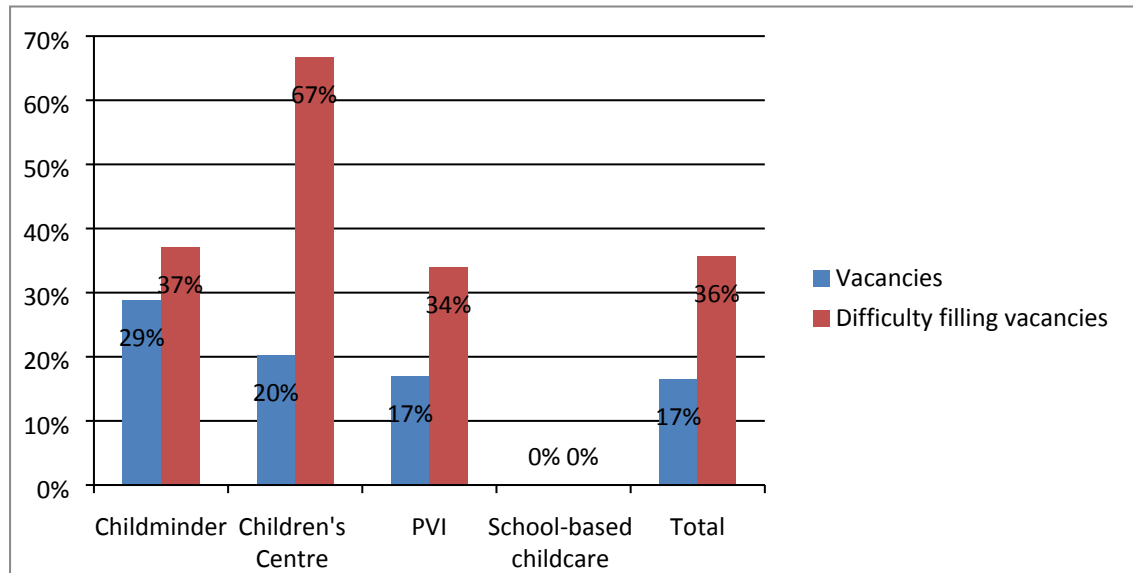
5.5 Vacancies

Respondents were asked about current vacancies and whether they experienced difficulties in filling vacancies. Overall, 17% of registered places were currently vacant, with childminders experiencing the highest level of vacancies (29%) and school-based childcare experiencing the lowest at less than 1%.

36% of all respondents that replied to this question said that they had difficulty in filling vacancies. Children’s Centres were most likely to identify difficulty in filling places, with 67% stating that they experienced difficulty in filling vacancies. School-based childcare had the lowest level of vacancies at 1%.

Figure 9 - Percentage of vacancies and difficulty filling vacancies by sector

5.5.1 Reasons for vacancies



5.5.1.1 Parents' preference for nursery places

A number of childminders stated that parental preference was for nursery places in particular for older children - so if a full daycare nursery opened near to them, they would often lose custom.

5.5.1.2 FYI website

Both childminders and day care settings were frustrated that the FYI website was not operating as effectively as they would have wanted. However these issues have now been addressed and we have refreshed the information on the web site in relation to the details about childcare providers in Barnet.

5.5.1.3 Location

Childminders in particular felt that some areas were oversaturated with childminders, which accounted for their vacancies

5.5.1.4 Age groups

Both childminders and childcare settings stated that some age groups were harder to fill than others. In particular, babies under one year old – which several settings described as the ‘hardest to fill’, and childminders felt was the age when many parents preferred the home-based care of a childminder.

5.5.1.5 Impact of FEE

Whilst providers were asked separately about the impact of Free Early Education (FEE), a number separately identified the impact of FEE on their vacancies.

The most common reason cited was that whilst FEE places were popular and FEE places were easy to fill, they were not financially viable – in particular for providers that employed qualified and high quality childcare staff.

6. Free Early Education (FEE)

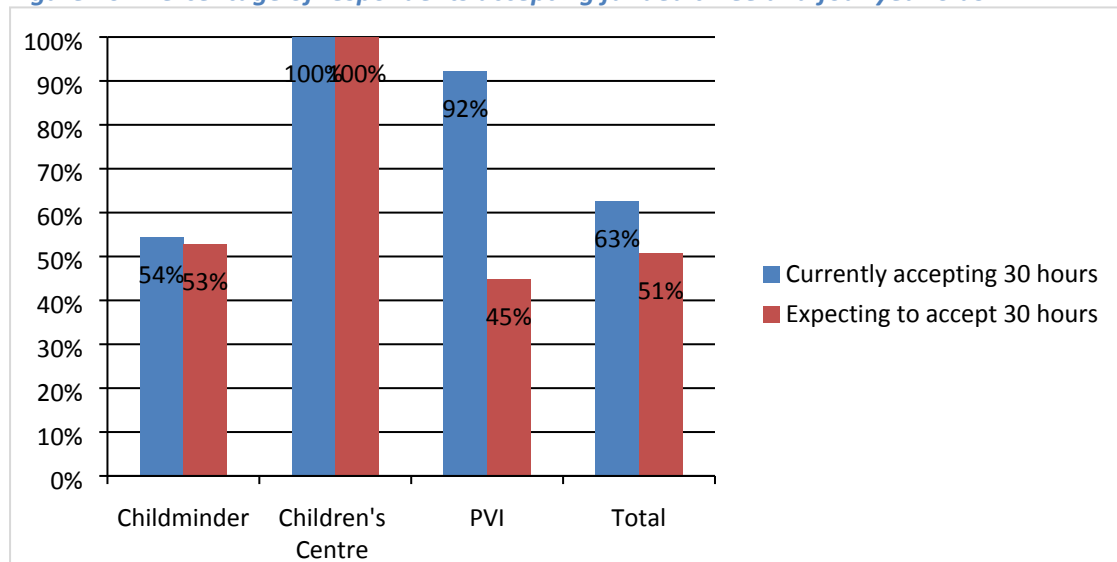
The most recent headcount data revealed that Barnet has achieved 82% take up for all three and four year olds accessing the free entitlement, compared to 96% of three and four year olds nationally, whereas take up for two year olds accessing the free entitlement is 53%²⁵. This is compared to 58% of eligible two year olds nationally²⁶.

All settings were asked if they accepted free early education funding for two, three and four year olds, and if they were aware of the plans to increase to 30 hours per week the free childcare offered to working parents²⁷.

6.1 Providers accepting funded three and four year olds

Overall 63% of respondents currently accepted FEE funding for three and four year olds, ranging from 46% of childminders to 100% of Children’s Centres.

Figure 10 - Percentage of respondents accepting funded three and four year olds



6.1.1 Reasons for not accepting FEE funding

Respondents who did not accept, or did not expect to accept, FEE 3 and 4 were largely of the view that the money was insufficient for their business model. Where providers could fill their places with full fee-payers, they did not think that the FEE scheme made commercial or quality sense, with providers identifying “The financial impact of underfunding on our business and quality of care”.

6.2 Two year old funding

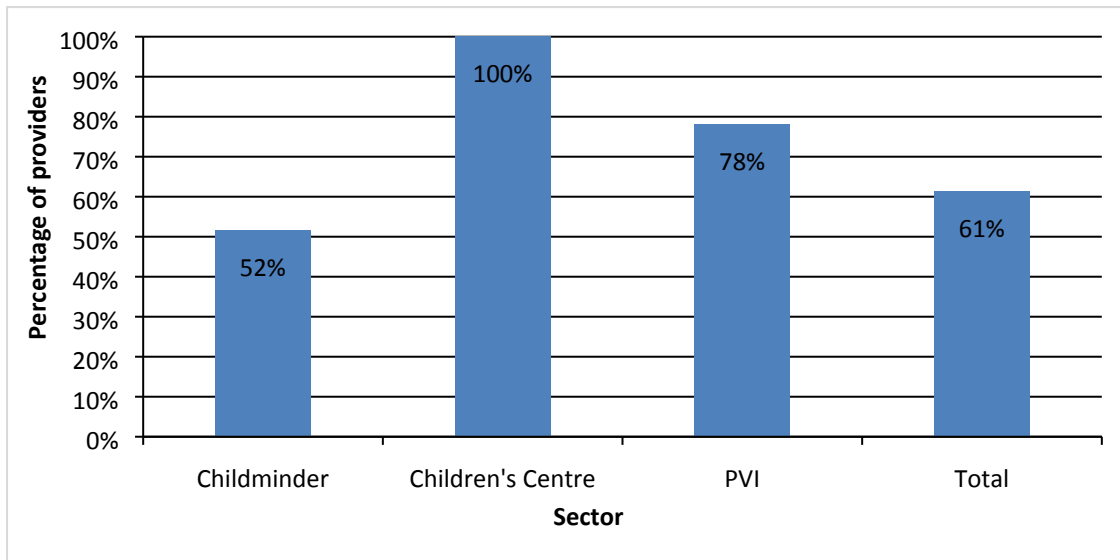
Overall, 61% of all providers who responded to the question accepted FEE 2 funding, ranging from 52% of childminders to 100% of Children’s Centres.

Figure 11 - Percentage of respondents accepting FEE2

²⁵ Autumn 2015 headcount data taken for FEE 3 and 4 year olds and Spring 2016 headcount data taken for FEE 2 year olds. Both figures are below the England average.

²⁶ Statistical First Release 20/2015: Provision for children under five years of age in England: January 2015: <https://www.gov.uk/government/statistics/provision-for-children-under-5-years-of-age-january-2015>

²⁷ DFE-00177-2015

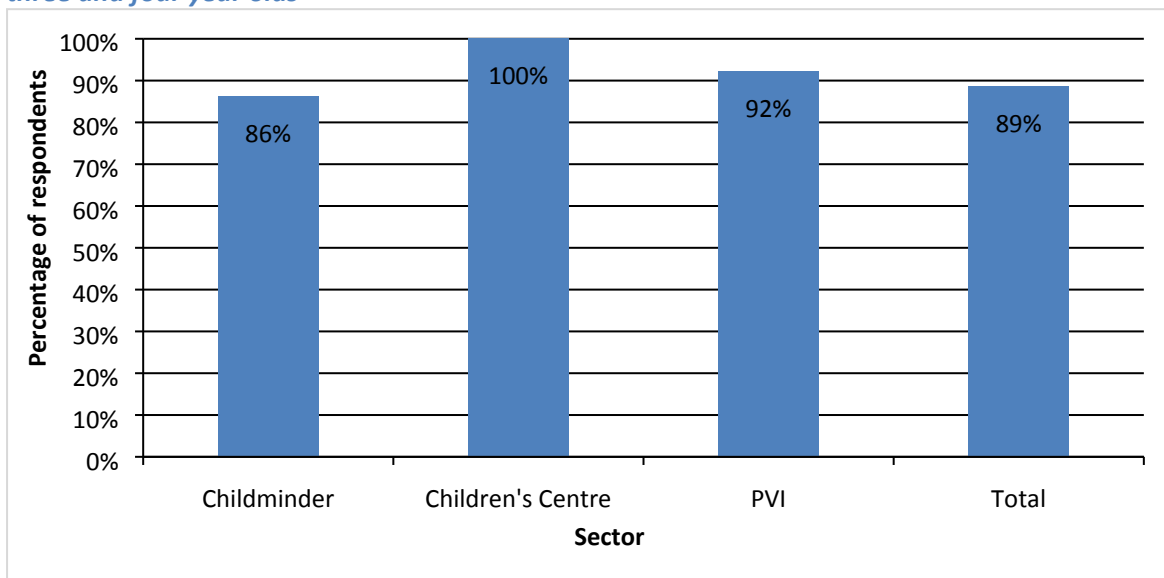


Providers that did not accept the funding were, for the most part, of the view that it was insufficient to continue to provide high quality childcare.

6.3 Awareness of increased hours for three and four year olds

Overall 89% of relevant providers were familiar with the planned increase to 30 hours per week for working parents of three and four year olds, with similarly high recognition from all sectors. Whilst Children’s Centres unanimously expected to be able to respond to the planned increase in hours, other sectors were more likely to reject it, with only 45% of PVIs expecting to be able to offer 30 hours/week free childcare.

Figure 12 - Percentage of providers that were aware of the planned increase to 30 hours FEE for three and four year olds



In addition to this we conducted a short survey of PVIs. We contacted 89 providers PVIs out of whom

64 providers who took part in the Telephone survey, 69% said they would be interested in increasing their provision for children with working parents, whereas 39% said they would not. Providers cited the reasons below in relation to not being able to expand their provision.

6.3.1 Cost and funding rate

The majority of respondents cited financial concerns as the reason to not increase their provision; providers stated that they did not know how much the hourly rate would be and feared that a rate per hour that was too low would be unsustainable for them as a business. Most providers said that the current funding rate for FEE3/4 is already quite low and if they increase hours for one child to 30 hours per week at the current rate then this would make their business model unviable. However, these respondents also said that their decision to expand would be based on the new hourly rate.

6.3.2 Capacity

Providers who said that they would be interested in expanding their provision for working families stated that they would need some support to expand their physical space to accept more children for longer hours; this included capital grants from the local authority to convert rooms. In addition to this, providers said they would need to negotiate the use of their premises if they considered expanding or look into moving into new buildings.

6.3.3 Staffing

Some providers mentioned staffing as a concern for increasing their childcare hours. Some settings stated that they would need to consider additional staff training and make provision for staff sickness during longer working hours. There would also be added impact by the increase in minimum wage, and unless this is off-set by the new funding rate, it would make the option of increasing almost impossible.

6.3.4 Impact on disadvantaged children

One provider stated that there would be an impact on disadvantaged children accessing the first 15 hours of grant-funding, and places may be prioritised for working families, which could marginalise an already disadvantaged child.

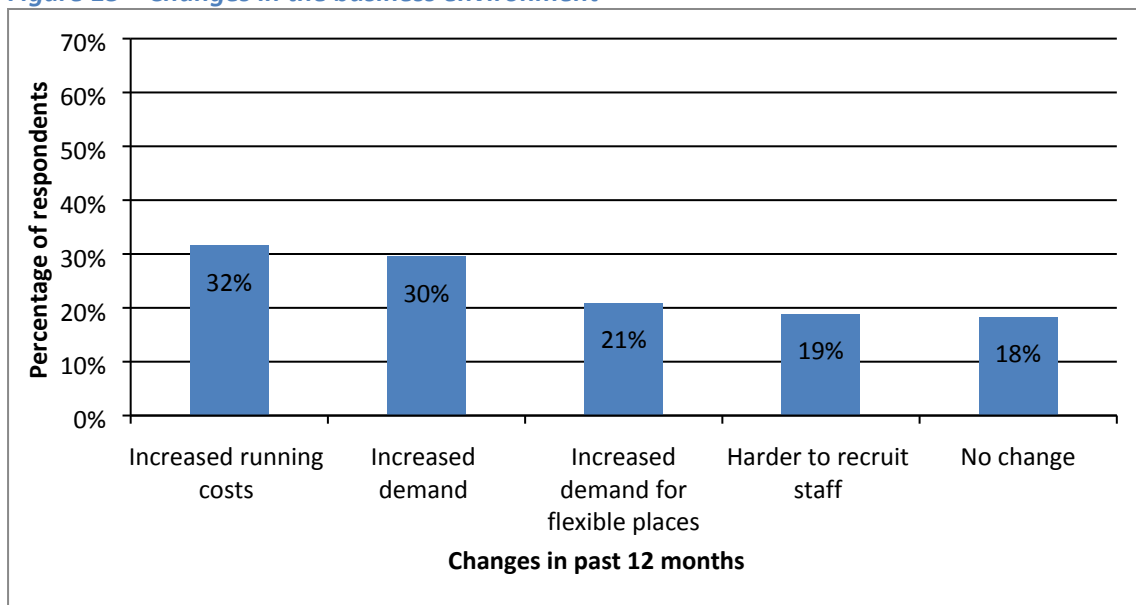
7. The Childcare business

Providers were asked about significant changes to their business in the previous 12 months, and how they intended to respond – in particular if they planned to increase their fees and/or stay in the childcare business

7.1 Changes in the business environment

82% of respondents felt that the business environment has changed in some way in the past 12 months, with 32% identified an increase in running costs. 30% identified an increase in demand, and 19% felt that it was harder to recruit staff.

Figure 13 – Changes in the business environment

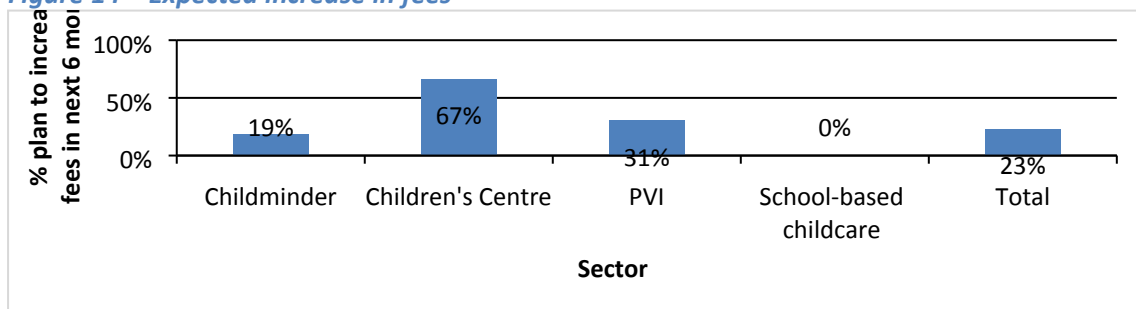


There were some differences by sector, with Children’s Centre and PVI settings more likely to cite an increase in demand (67% and 45% respectively) than childminders 22%. Children’s Centres were the most likely to find it harder to recruit staff (67%) than any other sector.

7.2 Plans to increase fees

Overall, 23% of respondents planned to increase their fees in the next six months. Broken down by sector; interestingly, Children’s Centres were most likely to increase their fees (67% of Children’s Centres).

Figure 14 – Expected increase in fees



7.3 Plans to continue as a childcare provider

Providers were asked how long they intended to continue to provide childcare. 55% of providers planned to remain for the foreseeable future. Providers who did not plan to remain in childcare gave the following reasons

7.3.1 Funding and the increase in Free Nursery Education funding

Number of providers cited lack of funding as one of the main factors in not increasing the Free Early Education funding. Providers felt that the lack of funding which would become available would not be enough and that it could undermine the quality of provision in the future.

7.3.2 Paperwork

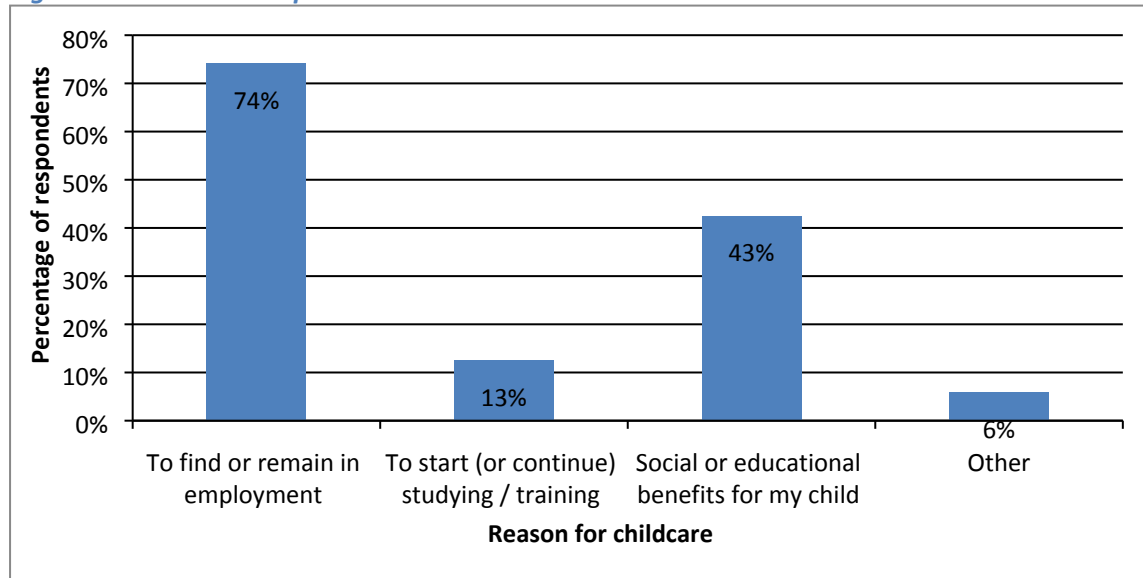
Paperwork and Ofsted requirements were cited by a small number of respondents; specifically stating that paperwork and pressure from Ofsted was preventing them from spending time providing high quality childcare.

8. Childcare Demand

8.1 Main reasons for using childcare

The majority of respondents using childcare (73%) stated that it is to enable them to find or remain in employment. A further 12% use childcare to enable them to access training opportunities. In addition, 43% of respondents said they felt their child would benefit socially from childcare. A small number of parents cited other reasons - largely to give them or their partner a break from childcare.

Figure 15 – Reasons respondents use childcare



8.2 Cost of paid childcare

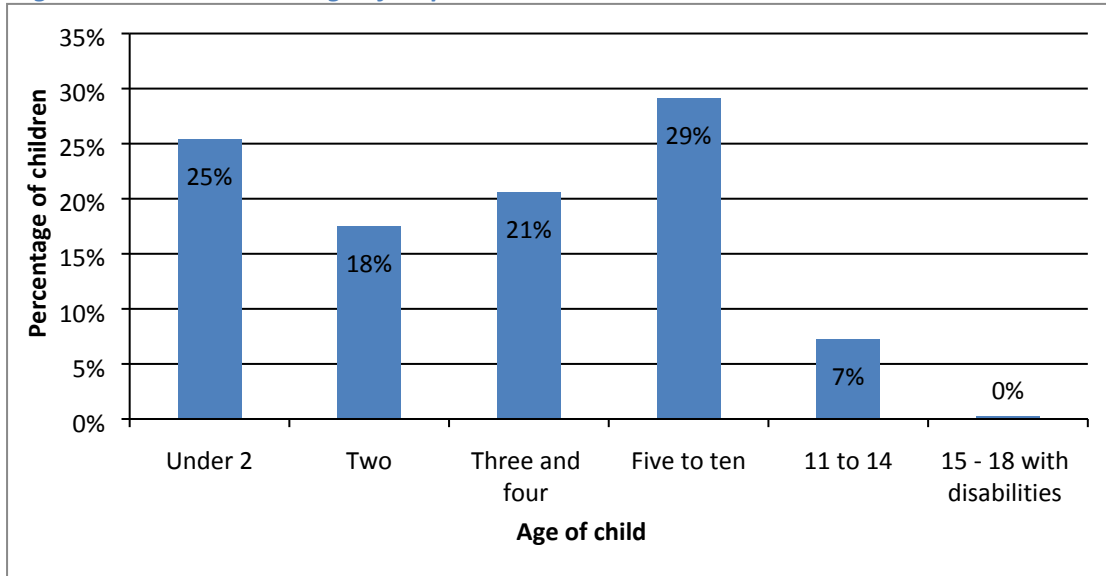
Respondents were asked what they currently paid for childcare in an average week, both during term-time and over the school holidays. The average costs were similar, ranging from £10 per week to over £1,000 per week, and averaging between £150 and £200.

8.3 Age and number of children

Parents had a total of 457 children aged under 14 (or under 19 for children with SEN or disabilities). 26 children (5.7% of the sample) had special needs or disabilities. The age breakdown was as follows

- 25% of all children in the survey were under two years old
- 18% of all children in the survey were two years old
- 21% of all children in the survey were aged three to four years old
- 29% of all children in the survey were aged five to ten years old
- 7% of all children in the survey were aged 11 to 14 years old
- One parent had a child aged 15 to 18 years old with a disability

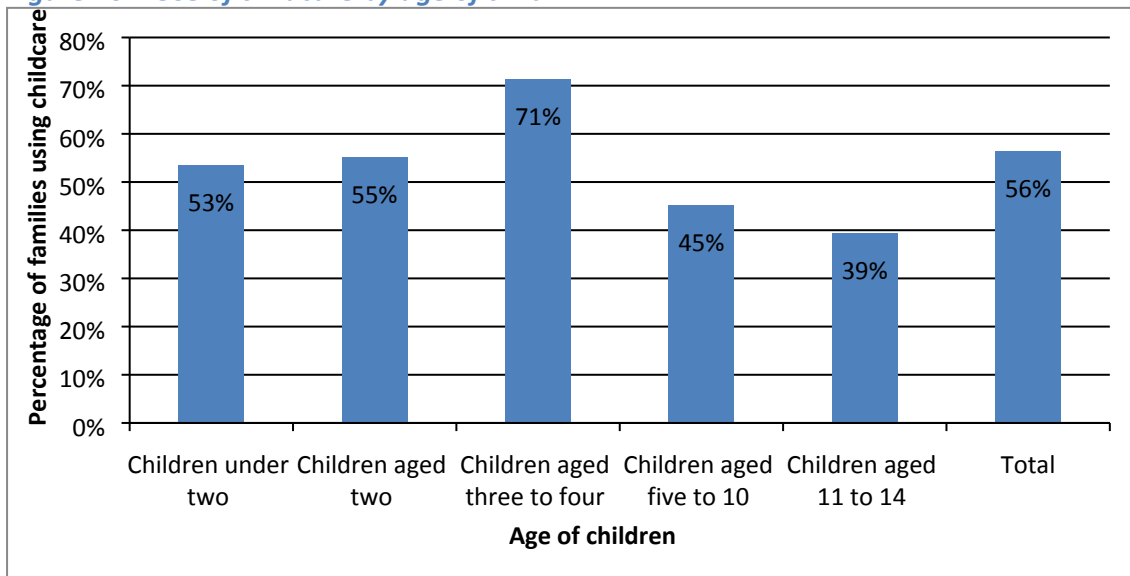
Figure 15 – Number and age of respondents' children



8.4 Use of childcare in the past 12 months

60% of respondents (146 respondents) said they had used some form of childcare – including paid and/or unpaid - in the last 12 months. This was highest amongst parents with children aged three to four, with 71% of parents of this age group accessing some form of childcare. Parents with children aged 11 to 14 were least likely to use childcare.

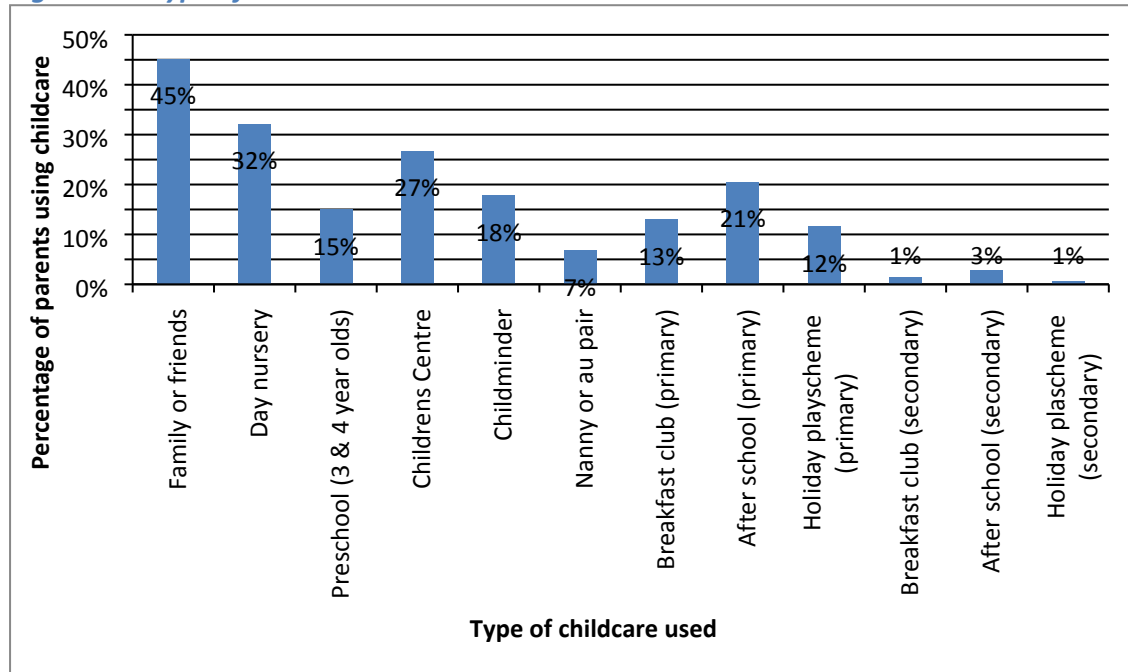
Figure 16 – Use of childcare by age of child



8.5 Type of childcare used

Parents were asked what type of childcare they used, with the majority of parents using several types of informal childcare.

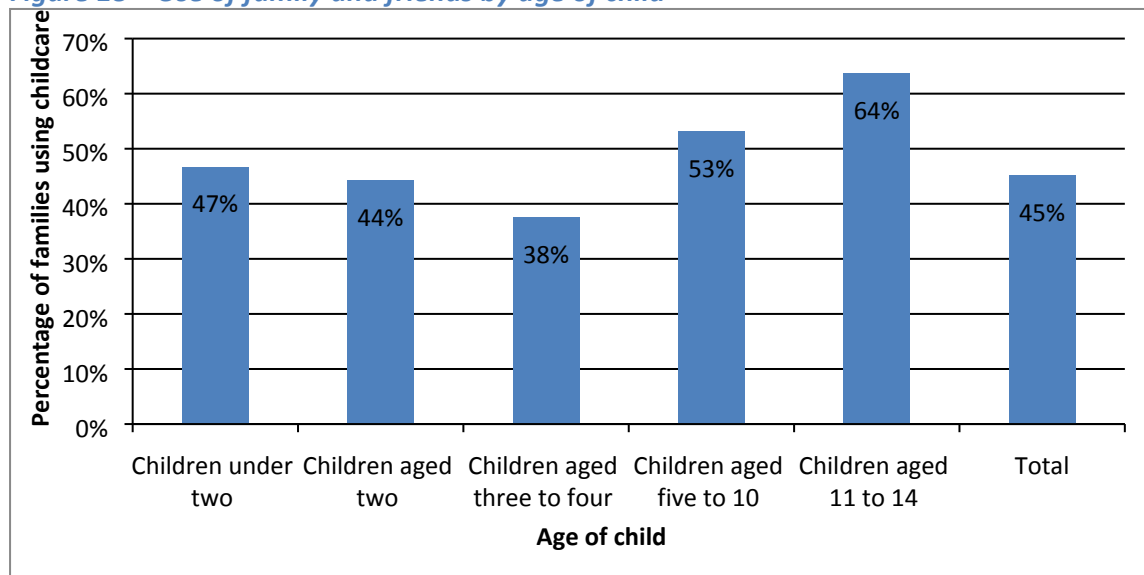
Figure 17 - Type of childcare used



8.6 Use of family and friends for childcare

Overall, 45% of all parents who use childcare used family and friends. This rose to 64% of parents with children at secondary school, many of whom relied entirely on family and friends.

Figure 18 – Use of family and friends by age of child



9. Free Nursery Education

9.1 Two year old offer

90% of respondents with a child aged two stated that they 'were aware of' the two year old early education offer and 42% thought that their child might be eligible. 69% of respondents that thought they might be eligible took up their child's free place. 94% of respondents that took their child's free place used childcare in the London Borough of Barnet.

Respondents that thought that they were eligible²⁸, but did not take up the child's place were asked why they did not take up the place.

- 33% felt that their child would not benefit
- 33% could not get a place at their chosen provider
- 33% stated that their chosen provider did not accept funding for free nursery education

9.2 Three and four year old free nursery education

80% of respondents with children aged three and four said they took up a funded place for their child, of whom 92% stated that the place was in LB Barnet. Respondents who did not take up their free offer²⁹ gave the following reasons

- 25% stated that their child would not be ready for nursery education until they were four
- 25% stated that there was a charge for additional hours
- 25% stated that they could not get a place at their chosen provider or there were not places available and a further 8% stated that the setting to which they sent their child did not use the scheme
- 17% stated that they did not know about the free entitlement

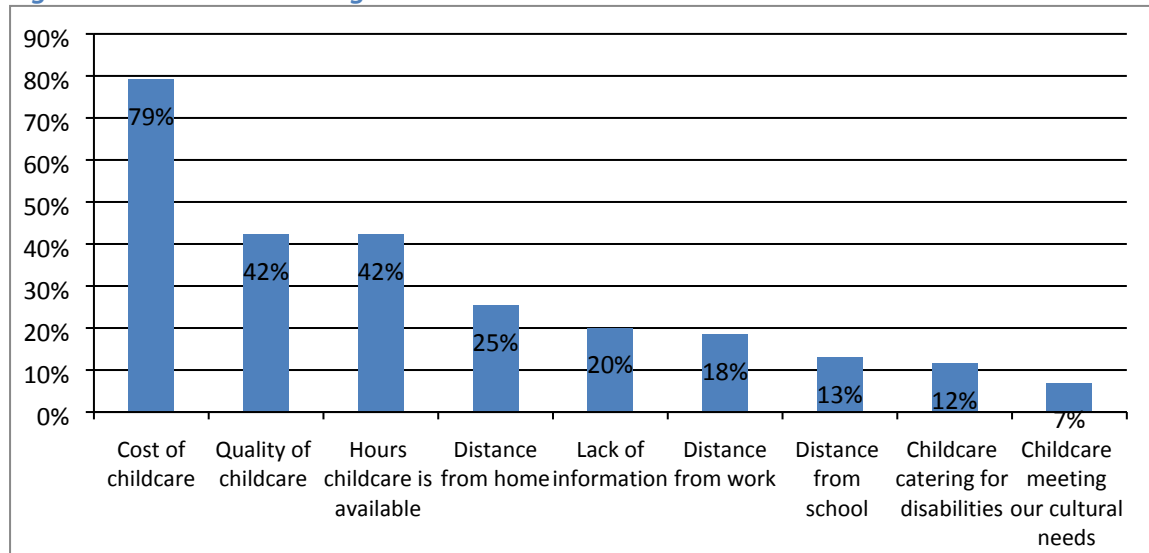
²⁸ Numbers are very low, so percentages are not statistically valid

²⁹ Numbers are very low, so percentages are not statistically valid

10. Barriers to using childcare

The cost of childcare was cited by 79% of respondents as the biggest barrier to taking up a funded place. Quality of childcare and hours it was available were also cited by large numbers of respondents.

Figure 19 – Barriers to using childcare



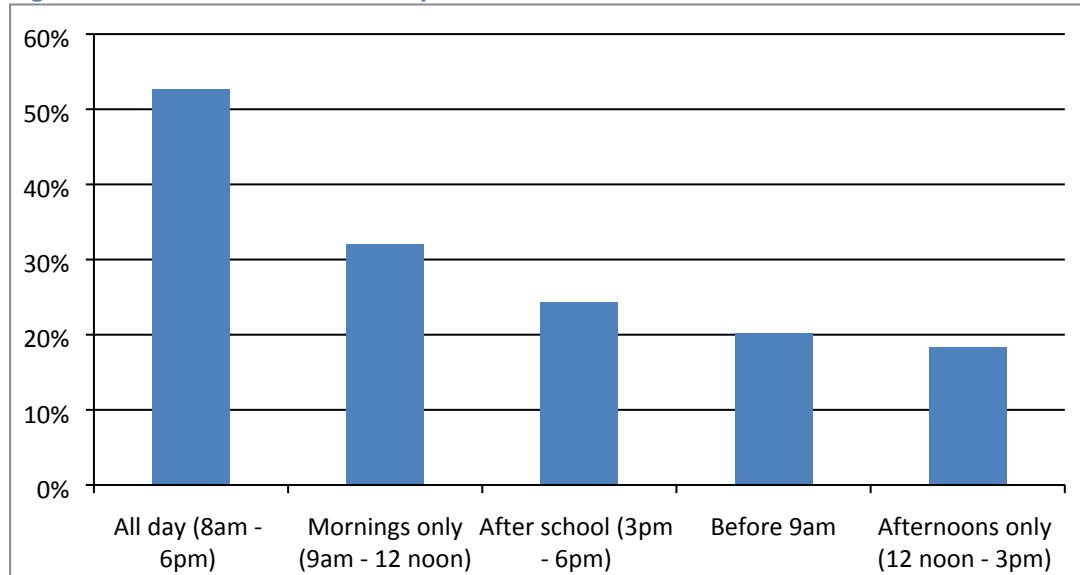
Lack of availability of suitable childcare was also cited by a number of parents, in particular lack of after school care. In addition to this, one parent with a disabled child cited the lack of childcare and/or respite activities to support families with disabled children.

11. When childcare is required

11.1 School term time

53% of respondents said they wanted full time daycare between 8-6pm, followed by mornings only (32%), after school (24%), early morning (18%) and afternoons only (11%).

Figure 20 – When childcare is required



11.2 School holidays

During school holidays, similar times were required. A number of respondents stated that they were teachers, and therefore had not need for childcare for their school-aged children.

12. Improvements parents would like to see

Parents were asked what improvements they would like to see. A number stated that they were very happy with all aspects of childcare.

12.1 Improved information

A number of parents stated that they had found it hard to find information about the type and quality of childcare available, and that they had to rely on family and friends.

12.2 Cost of childcare

A common concern was the cost of childcare, with the increasing costs of nurseries and child minders making it very uneconomic for many parents to return to work. A number of parents stated that the cost of childcare made it not worth working.

12.3 Free Nursery Education

From those who took part in the survey, a number of parents found it difficult to take up the free nursery education offer. For example, some parents found that the nursery of their choice did not accept Free Nursery Education funding. Where the funding was accepted, it often offered very little reduction to the overall charges.

12.4 Times childcare is available

A number of parents requested longer opening hours. In particular, parents working in central London needed 7am to 7pm to accommodate commuting time.

12.5 Childcare for children with special needs

Families with children with special needs felt that there was inadequate childcare catering for their child's needs and in particular no out of school childcare.

12.6 Out of school care

Out of school childcare was said to be insufficient, and parents felt that not enough information is available to them. In addition to this, parents stated that they would like to see more drop off and pick-up services at school sites, and more affordable out of school childcare provision.

12.7 High quality places

Respondents felt that nurseries with high Ofsted ratings usually had long waiting lists; some parents stated that they felt there were fewer teachers and they felt worried that more cutbacks would lead to larger teacher-child ratios.

12.8 Safety concerns

A number of parents felt that the authority's response to recent concerns about sexual abuse was inadequate, leading to a fear of leaving children in unsafe settings.

13. Gap Analysis

13.1 Childcare

As mentioned earlier in this report, Barnet has a rapidly growing population, with a high number of 0-4 year olds concentrated in some of the most deprived parts of the borough, in particular in the west, in Colindale and Burnt Oak. These areas also have the highest population of families who are on out of work benefits and lone parents. When considering available childcare in these areas we have discovered that the largest shortfall in places is in Colindale. However, this area is also undergoing extensive regeneration, with new affordable housing and new jobs which will create a greater need to ensure there is sufficient childcare.

13.2 Information for parents

As part of this parents said that they found it hard to find information about the type and quality of childcare available, and that they had to rely on family and friends.

13.3 Two year old offer

Our survey found that although 90% of respondents said they knew about the two year old offer, only 42% thought that they were eligible. Out of this number 69% took up a place. Parents said that they did not know how to find out if their child were eligible, or how to take up a place if they were. In addition to this, there is a particularly high shortfall in the number of FEE 2 year old places in Golders Green, which has a large Jewish population. Evidence collated from our one to one parent sessions which took place at the London Jewish Family Centre in Golders Green shows that mothers were particularly reluctant to take up the FEE 2 offer due to cultural and religious reasons.

13.4 Extension of childcare for three and four year olds of working families

With regard to childcare providers potentially increasing their provision to accommodate the new extended free entitlement for three and four year old children from working families, our research has found that providers cited reasons such as the current cost and funding rate; capacity; staffing levels and quality; and impact on disadvantaged children – in particular some providers were concerned that new places for FEE3/4 might have a detrimental effect on the number of places allocated for FEE2 children and push disadvantaged groups out.

13.5 Out of school care

Finally, parents who took part in the survey found that there is a distinct shortage in the number of childcare providers for out of school care, such as breakfast, after school, and holiday clubs. In addition to this, one parent said that there was no provision available to children who are affected by special educational needs and disabilities.

14. Recommendations

The following recommendations have been identified based on this assessment:

- Improve LB Barnet's childcare information online and through the work of early years professional to ensure all parents can access information about the type of childcare that is available in the borough, both in early years settings, childminders, and in particular, for families seeking out of school childcare such as breakfast club, afterschool care and holiday clubs. This also includes improving the quality of data held by LB Barnet on its internal childcare database, Tribal, for more robust evidence on the service offered by childcare providers, registered places, and live vacancies. LB Barnet has plans to launch a new Provider Portal in September 2016, which is intended to capture live information about childcare providers and vacancies. This will be linked to the LB Barnet web site, and will give greater transparency of local childcare services to parents.
- This CSA proposes that the early years' service works closely with the Jewish community to increase take up of the two year old offer, particularly in Golders Green where there is the highest shortfall in take up numbers. In particular the service will develop a Strategy and Engagement Plan to identify specific barriers in accessing services by particular groups and create a targeted action plan of support to increase take-up.
- Increase the number of free early education and childcare places available to two year olds from the most deprived areas and for those children in lone parent and out of work families, particularly in the west of the borough. This report has highlighted a disproportionately high number of disadvantaged families in areas such as Burnt Oak and Colindale where regeneration over the next five years will create more affordable housing and jobs for local people, putting added pressure on the need for targeted intervention with families in these areas to provide high quality, local childcare.
- Work closely with PVIs to help broker places for disadvantaged two year olds and explore opportunities to expand provision for the forthcoming childcare policy to provide an additional free 15 hours for three and four year old children in working families and increasing the provision of out of school childcare for older children. This will include creating a Working Families Childcare Strategy and Action Plan to respond to the growing demands on childcare provision for working families in the borough.
- Work with school to look for opportunities to further develop the role they play in providing early years services and out of school childcare, including the development of the free entitlement for two year olds in some schools and lead in the expansion of the forthcoming entitlement of free 30 hours for children of working families.
- Develop a robust system to ensure the childcare needs of children with SEND are met. In particular by developing partnerships between the boroughs inclusion team and supporting providers to improve their provision to cater for the needs of all children, and making this information transparent and accessible to parents of children with special educational needs.

Annex A – Tables

Table 1 - Total number of 0-4 and 5-14 year olds in Barnet

Ward	Total no. of 0-4 year olds	Total no. of 5-14 year olds
Brunswick Park	991	3320
Burnt Oak	1612	4244
Childs Hill	1469	3513
Colindale	1826	3854
Coppetts	1230	3240
East Barnet	1256	3103
East Finchley	1175	2688
Edgware	1359	3589
Finchley Church End	1104	2732
Garden Suburb	1097	2734
Golders Green	1842	4519
Hale	1421	3807
Hendon	1542	3156
High Barnet	991	2632
Mill Hill	1316	3805
Oakleigh	1139	2789
Totteridge	1146	2673
Underhill	1013	3334
West Finchley	1317	2546
West Hendon	1466	3037
Woodhouse	1226	3102
Total	27538	68417

Source: GLA population estimate, 2014

Table 2 – Ethnicity and EAL of children under 5

Ward	Number of 0-4 year olds in ward	Number of EAL children under 5	% of children in ward	Number of BAME children under 5	% of children in ward
Brunswick Park	991	388	39%	461	46%
Burnt Oak	1612	1180	73%	1000	62%
Childs Hill	1469	1150	78%	744	51%
Colindale	1826	1160	64%	1057	58%
Coppetts	1230	582	47%	574	47%
East Barnet	1256	486	39%	366	29%
East Finchley	1175	486	41%	420	36%
Edgware	1359	753	55%	506	37%
Finchley Church End	1104	669	61%	537	49%
Garden Suburb	1097	610	56%	360	33%
Golders Green	1842	1107	60%	502	27%
Hale	1421	750	53%	616	43%
Hendon	1542	811	53%	538	35%
High Barnet	991	324	33%	329	33%
Mill Hill	1316	735	56%	667	51%
Oakleigh	1139	480	42%	353	31%
Totteridge	1146	660	58%	625	55%
Underhill	1013	401	40%	399	39%
West Finchley	1317	797	60%	568	43%
West Hendon	1466	938	64%	740	50%
Woodhouse	1226	542	44%	485	40%
Total	27538	15008	55%	11847	43%

Source: LB Barnet Early Years Census 2015

Table 3 – Children with Special Educational Needs

Ward	Reception - Yr 14
Brunswick Park	276
Burnt Oak	612
Childs Hill	228
Colindale	588
Coppetts	277
East Barnet	424
East Finchley	271
Edgware	256
Finchley Church End	205
Garden Suburb	120
Golders Green	410
Hale	347
Hendon	285
High Barnet	213
Mill Hill	346
Oakleigh	269
Totteridge	205
Underhill	294
West Finchley	209
West Hendon	280
Woodhouse	284
Out of Borough (children funded by Barnet)	1102
Total	7501

Source: LB Barnet Schools Census 2015

Table 4 - Out of work benefits

Ward	Number of families	Total in ward	% of families with children aged 0-4
Brunswick Park	205	991	21%
Burnt Oak	545	1146	48%
Childs Hill	370	1097	34%
Colindale	420	1104	38%
Coppetts	315	1317	24%
East Barnet	270	1175	23%
East Finchley	240	1139	21%
Edgware	215	991	22%
Finchley Church End	120	1226	10%
Garden Suburb	105	1013	10%
Golders Green	265	1256	21%
Hale	280	1230	23%
Hendon	225	1466	15%
High Barnet	155	1542	10%
Mill Hill	265	1359	19%
Oakleigh	225	1469	15%
Totteridge	140	1316	11%
Underhill	345	1421	24%
West Finchley	160	1826	9%
West Hendon	290	1612	18%
Woodhouse	280	1842	15%
Total	5435	27538	20%

Source: DWP data and analytics, 2014

Table 6 – Lone Parents

Ward	Lone Parent
Brunswick Park	60
Burnt Oak	175
Childs Hill	135
Colindale	210
Coppetts	120
East Barnet	100
East Finchley	75
Edgware	70
Finchley Church End	40
Garden Suburb	15
Golders Green	100
Hale	95
Hendon	75
High Barnet	50
Mill Hill	70
Oakleigh	110
Totteridge	40
Underhill	115
West Finchley	50
West Hendon	95
Woodhouse	95
Total	1895

Source: DWP data and analytics, 2014

Table 7 – Shortfall in places

Ward	Number of known childcare places	Shortfall in impending 30 hours FEE ¾ places	Shortfall in FEE2 places
Brunswick Park	246	51	-23
Burnt Oak	672	128	95
Childs Hill	120	125	38
Colindale	322	167	32
Coppetts	404	75	4
East Barnet	477	60	16
East Finchley	276	59	-8
Edgware	262	95	30
Finchley Church End	318	66	1
Garden Suburb	48	75	21
Golders Green	179	155	119
Hale	574	71	34
Hendon	386	110	13
High Barnet	375	41	-29
Mill Hill	314	95	-6
Totteridge	191	75	-1
Underhill	356	57	0
West Finchley	277	79	23
West Hendon	281	114	24
Woodhouse	340	67	27
Total places	12444	1373	337

Source: Early Years Team, LB Barnet, March 2016