

# Childcare Sufficiency Assessment 2023



# Childcare Sufficiency Assessment (CSA) 2023/24

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# 1. Executive Summary

## 1.1 Introduction

All Local Authorities are required to ‘report annually to elected council members on how they are meeting their statutory duty to secure sufficient childcare, and make this report available and accessible to parents’. We have prepared this report in order to meet this duty. The report informs strategy going forward, and priorities for supporting and improving early education and childcare in the borough.

The Government plans a significant extension of childcare support for families, starting from April 2024. This includes an expansion of funded childcare for working families with children under three and an increase in the availability of wraparound care for primary aged children. The new CSA has been produced at an important time in the planning for these changes to the childcare offer in Newham. The report will inform our local strategy to support families’ access services and our plans to support providers to deliver services that meet the childcare needs of local residents.

Having sufficient childcare means that families are able to find childcare that meets their child’s learning and development needs and enables parents to make a real choice about work and training. This applies to all children from birth to age 14, and to all children and young people with disabilities.

In this report, we have assessed sufficiency using evidence about the need for childcare and the amount of childcare available and this includes both the views of local parents and childcare providers. In this year’s report, this includes the mapping of future supply and demand for the expanded childcare offer that will begin in 2024/25.

We use information about childcare sufficiency to plan our work supporting the local childcare economy. The report makes recommendations to ensure a sustainable childcare offer meets the needs of Newham families. Sufficiency is assessed separately for early year’s children (0-4) and for school aged children (5+) and analysis is made at borough and local ward level.

Newham’s last childcare sufficiency assessment (CSA) was a snapshot of sufficiency in 2022/23 and we report back on the progress that was achieved against the priorities identified then at 1.2. The new 2023/24 assessment compares how the provision of childcare for under-fives and school age children has changed since our last report and takes a view on the current and future sufficiency of provision. The findings are summarised at 1.3, with a new action plan for 2024/25 detailed at 1.4.

The remainder of the report provides the underpinning evidence and data that the conclusions and proposed actions are drawn from. This further detail will be helpful to those developing or changing childcare services and includes ward level analysis of child populations, childcare places, future child population projections, parent views and current provider business challenges.

## 1.2 Progress against last year's action plan

### 1.2 Progress delivered against Newham's CSA Action Plan 2023/24

A detailed action plan was developed against the six areas for focus identified in last year's CSA. Progress against the agreed actions were regularly reviewed by Officers and progress updated on a monthly basis over the course of 2023/24.

#### 1.2a Quality – actions delivered in 2023/24 included:

- Early Years Advisory Teachers (EYATs) and Newham Early Education Practitioners (NEEPS) have continued to fulfil our Statutory duty in supporting practice development in new settings and those with an Ofsted grade less than good, through a specific programme of CPD and individual action planning following visits.
- Settings due Ofsted have been targeted for support from EYATs and NEEPS
- Universal support has been delivered through our continuing professional development (CPD) programme, which has been developed following consultation with providers, and through forums and quality audits
- NEEPS have supported childminders through networks and forums, and continue to develop and deliver CPD and support the quality audit.

#### 1.2b Workforce – actions delivered in 2023/24 included:

- A staff recruitment webpage has been developed for providers on the Newham Families website. This has gone live and is used by providers to advertise job opportunities in Newham settings.
- A recruitment and retention workshop was delivered for Newham providers, in partnership with Hempsalls, with resources being shared with providers.
- Professional development support has continued to Managers to ensure robust recruitment and retention of staff.
- Participation of the DfE Recruitment and Retention strategy group continued.
- Outreach has been delivered at Job Centre Plus Jobs Fairs, where we have promoted childcare as a career option.
- The Childminder Induction Programme ran in summer 2023 helping ensure the best quality workforce entering the profession.
- The service has proactively engaged with the DfE Early Years Education Recovery programme, alongside existing local workforce training and support strategies to ensure accessible and flexible offer of continuous professional development

### 1.2c Sustainability – actions delivered in 2023/24 included:

- Refreshed new starter packs have been issued for both group care settings and childminders.
- Termly briefings for new starters have been delivered, including an introduction to the market for childcare in Newham, current business opportunities and challenges, an introduction to business planning and the delivery of funded early education and childcare.
- Promotion of new childminder start up grants was undertaken.
- A termly update of a provider risk register was completed, identifying settings at risk in order to identify practical support and solutions, where possible.
- Development and sharing of a self-assessment business health check tool and resources, allowing providers to develop an action plan to make business improvements.
- Updates have been provided on the demand and supply of childcare in the borough, with findings being shared with providers via forums and the 234 newsletter.
- Briefings and an information pack have been developed for providers with regard to the planned expansion of funded early education for working families.
- Providers have been consulted and informed changes to funding rates.
- Providers have been encouraged to register for the tax-free childcare scheme and make the most of other funding available such as early years pupil premium, disability access fund and special educational needs inclusion fund.

### 1.2d Funded Early Education – actions delivered in 2023/24 included:

- A termly promotional campaign focusing consecutively on each of the three funded entitlements available in the year and the delivery of more community focused outreach activities has resulted in further improvements in the uptake of the established funded entitlements.
- The recruitment of over 120 providers to deliver the new expanded funded childcare offer for working families with children under three, starting in April 2024.
- Awareness raising re the upcoming expansion for family facing professionals. This was delivered via briefings and sharing of information packs.
- Guidance and information sessions have been developed to support providers with the new administration processes for the expanded funded childcare offer
- A new promotional campaign has been launched for the new expanded childcare offer including outreach, social media, banners, flyers and website refresh.

1.2e Special Education Needs and Disabilities (SEND) – actions delivered in 2023/24 included:

- Updating of the Local Offer to reflect parent feedback and the addition of a professional's page.
- A review of the universal and targeted training offer to support the upskilling of the workforce in supporting children with SEND.
- Capital funding secured for SEND resource provision.
- Awareness raising to promote take up of the funding streams available to support SEND children in early year's provision.
- Briefings and information with regard to the early notification process to support SEND children.
- Parents are better informed and are supported to access the range of services on offer.

1.2f Information – actions delivered in 2023/24 included:

- A refresh of our communications plan for the funded entitlements and help with childcare costs including targeted communications campaigns. Utilising DfE toolkits and locally devised resources to promote entitlements across the borough. Our parent survey indicates that Newham families' awareness of help with childcare continues to improve.
- Refresh of Early Years information on FIS website. Regular updates of information and signposting to assist families with navigating entitlement pathways.
- Monthly issue of our "234" newsletter were shared with Newham based childcare settings, providing information and updates on developments in early education and childcare.
- Outreach programme delivered by Newham Early Education Practitioners (NEEPs), to support the take up of funded entitlements and other help with childcare.
- Direct mail campaign, which distributed letters to Newham families alerting them to the availability of funded childcare, including the new expanded funded childcare offer.
- Guidance issued to providers to encourage them to share and promote the childcare options they have available to meet the different childcare needs of families.
- During the year a termly Childminder Forum was introduced to share information and best practice. A similar forum "Managers Forum" is well established and is a resource for group care settings.

## 1.3 Childcare Sufficiency Assessment Findings 2023/24

### 1.3a National Context and Trends for Early Education and Childcare in 2023/24

- In the spring budget of 2023, the Government announced measures to increase the childcare support that will be available to working families. This significant development will change the landscape for the delivery of early education and childcare from 2024. The expansion includes:
  - New funded early education and childcare for children under three, which is being rolled out over the period April 2024 to September 2025;
  - An expansion of out of school places that wraparound the school day for children in primary schools, starting from September 2024.
- To be successful, these expansions will require the participation of established good quality provision, as well as the creation of new childcare where there is an identified need. The Government is providing additional support in terms of revenue and capital funding to help bring about the expansion of childcare services available to families.
- Local Authorities are playing a key role in delivering on the expanded childcare offer in their local area and there is currently significant focus on gearing up for delivery of the expanded offer from 2024.
- In terms of childcare places available, there was a 5% decline in the number of childcare providers and a small 1% reduction in the number of childcare places available in England, in the year from September 2022 to August 2023<sup>1</sup>. Most of this overall decline is due to a fall in the number of childminders, where the number has declined by 2,580. This is a continuation of an existing trend, although the decline is smaller than reported last year.
- As at 31 August 2023, 96% of childcare providers have been judged good or outstanding at their most recent inspection. This is the same as in the previous year. However, since 2019 the proportion of outstanding childcare providers has fallen from 20% to 14%.
- Nationally, there has been a marginal decline in the overall quantity and quality of early education and childcare, reflecting the challenges brought about by the impact and aftermath of Covid-19, business cost inflation, the cost of living crisis and staff recruitment challenges in the sector. Despite this, the sector has demonstrated a high level of resilience in overcoming the challenges faced over the last three years and the new expanded childcare offer is an opportunity for the childcare sector to grow overall.

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<sup>1</sup> Ofsted Statistics Childcare Providers and Inspections published 30 Nov 2023

- From a parent perspective, the cost of accessing childcare continues to increase with families typically paying 5.6% more for an under two nursery place in 2023, compared to 2022, and 6.1% more for a two year old, according to the Coram Family and Childcare Trust.
- A national trend continuing in 2023 was the increase in children accessing SEN support, which increased to 13.0% from 12.6% in 2022.<sup>2</sup>

### 1.3b Newham's Local Childcare Sufficiency main findings 2023/24

Newham's Childcare Sufficiency Assessment provides a snapshot of Newham's childcare sector and market conditions in 2023/24, and should be seen against the national context detailed above.

The childcare sector in Newham has proven to be robust and adaptable in meeting the many challenges faced in recent years. There are now more childcare places available to Newham families overall and the vast majority of provision is either good or outstanding, according to Ofsted. This is a strong achievement given the context of the aftermath of the Covid-19 pandemic, the continuing cost of living crisis, challenges around the childcare workforce and the business health of settings.

The operating environment for childcare remains challenging, but is now attracting more Government focus and resources. There are opportunities ahead to grow new services to provide the high quality early education and childcare that parents need. Intensive work will need to continue to ensure providers are supported and enabled to meet the challenges ahead.

- There was a mixed picture in terms Ofsted inspection outcomes for Newham providers in 2023. Overall, there was an improvement in the Ofsted ratings for group care settings, with those achieving a good or outstanding outcome improving from 93.1 % to 95.1%, while childminder outcomes went the other way, falling from 97.8% to 93.9%.
- The number of early education and childcare places available to Newham residents has increased to 5,170 (+2.7%) compared to 2022, and is against the national trend. More group care places are available (+167), but childminder places have declined (-30). There has been some good improvement in availability of places in wards with the lowest availability. Over the last four years, those wards with the least places per resident child have seen places created, so that in 2023 the bottom four wards (East Ham South, Plaistow North, Boleyn and Green Street East) had a total of 430 early education and childcare places compared to 342 in the bottom four wards in 2020.
- Underneath the headline increase, the decline in places available with childminders as well as a reduction in private, voluntary and independent (PVI) out of school providers is an area of concern. These types of setting have an important role to play in the Government's expansion of childcare support.

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<sup>2</sup> [Special educational needs in England, Academic year 2022/23 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://explore-education-statistics.service.gov.uk)



- Take up of the funded entitlements dropped significantly in Newham and across the country during the pandemic, but these have recovered by 2023. In Newham take up of the funded early education for two year olds improved from 46% in January 2021 to 64% by January 2023, with the gap to the London take up average (65%) and England (72%) continuing to narrow. Take up of the universal entitlement in Newham also recovered from 79% in 2021 to 88% by 2023 and is above the London average of 84%. Take up of the 30 hours entitlement for children of working parents saw the highest take up to date in Newham in 2023, with 1,830 children benefitting in the peak summer term.

The number of places made available to the existing funded entitlement schemes from nurseries, pre-schools, schools and childminders has remained relatively stable in 2023. Overall, there is provider capacity to accommodate higher take up than the peak recorded attendance for each scheme. However, the Local Authority will need to monitor and track place availability across the funded entitlements to ensure each scheme has enough places, given the likely new demand on places that will come forward with the introduction of new entitlements from April 2024.

- Our mapping of supply and demand for the new funded entitlements being introduced from April 2024 indicates that there will be demand for around 1,300 funded 15 hour two year old places and that there will be sufficient places for this first phase of implementation. We expect around another 1,200 children from 9 months up to two in September, with around 900 places offered to the scheme at the time of writing in March 2024. When the hours of the scheme double to 30 in September 2025 new place creation will be needed in order to meet the expected demand. The Local Authority will be inviting capital bids from providers to create more places in areas of identified need for the second and third phases of implementation of the new entitlements.

As this is a new scheme that has not started there is a high level of uncertainty about both demand and supply and the estimates currently shown will need to be regularly reviewed, updated and shared with providers and other key stakeholders. Funded entitlement sufficiency is fully explored in section 3.11.

- Overall occupancy in settings (comprising both funded and fee paying early education and childcare) remains below that achieved pre pandemic. Group care settings reported an average occupancy of 54% and childminders 37% in the autumn term of 2023. Both parents and providers report the lower take up of fee-paying hours and more demand for part time places and flexible provision. This is likely to be related to the continuation of hybrid working for some and cost of living budget constraints for many. A significant portion of parents in Newham's survey said that they were not able to access all the childcare they needed within their budget (52%) and parents say they are using more informal childcare through friends and family. The planned expansion of the childcare offer may provide opportunities to improve access to affordable childcare, occupancy and support the sustainability of providers.
- Fee paying childcare costs in Newham group care settings have increased by an average of 11.4% between autumn 2022 and autumn 2023, on top of the 4.3% increase reported last year. Childminder fees have increased by an average of 7.7% in Newham between autumn 2022 and autumn 2023. Prices in Newham remain largely below the

averages for London but are above the average for England. The cost of childcare, including comparisons to regional and national charges is fully explored in section 3.10. Many providers will be facing increasing costs. Staffing accounts for around three-quarters of providers' total costs. As many staff earn at or around the minimum wage, a rising minimum wage significantly affects providers' finances. Other major budget lines, such as energy and rent, are also rising quickly.

- Parent satisfaction with the childcare services they access fell in Newham in 2023, with a reduced 68% of surveyed parents saying they were satisfied overall with their childcare arrangements. Parents identify the affordability and flexibility of childcare as key concerns for them and for some parents, access to good or outstanding out of school services is also identified as an issue.
- Parent awareness of the existing funded entitlements and other help with childcare costs continues to improve in Newham and is higher than reported nationally for the funded entitlement schemes. At the time of our parent survey, in autumn 2023, there was lower awareness of the new expanded funded entitlement for under threes, which starts in April 2024. Newham has now commenced a new promotional campaign to raise awareness for the new scheme.

With now eight types of childcare support being available depending on families' circumstances and child age, it is important that parents are informed of the support available to allow them to benefit. Newham has a very diverse population where language barriers and high mobility can be a block on the sharing of relevant information.

- In a survey of Newham group care settings, the biggest business challenges identified were business cost inflation, staff recruitment and retention, attracting new customers, cash flow and adapting business plans to reflect the new expanded childcare offer. To meet the likely increase in demand that will flow from the expanded childcare offer, providers will need to be able to afford, recruit, support and retain appropriately trained and experienced staff.
- Childminders responding to our survey listed business cost inflation, attracting customers, cash-flow and adapting business model to the new expanded childcare offer as their biggest business challenges. Childminders identify support with funding and payment processes as important for them in terms of help they want from the Local Authority to aid their sustainability.
- The number of children identified with Special Educational Needs or disabilities (SEND) in Newham is increasing in line with the national trend. This has resulted in an increase of referrals for support made by early education and childcare providers in the borough.
- With the roll out of an expanded wraparound offer for primary aged children being planned to start from September 2024, Newham is in the process of conducting a detailed mapping exercise to identify gaps in wraparound service supply. The findings will be used to identify the priorities for revenue and capital funding for expanded

wraparound services to be rolled out in 2024/25.

93% of inspected Out of School providers (including schools, childminders and PVI Out of School settings) are good, outstanding or met. There are a large number of providers awaiting their first inspection (21). There is wide variation in the quantity of recorded provision in each ward and the number of places available via childminders and PVI out of school providers has reduced in 2023. The wards with the least recorded places per resident for over-fives are Stratford, Royal Albert, Green Street West, Wall End and Plashet.

- Recorded occupancy in school based out of school provision is now similar to pre pandemic levels in autumn 2023 (77%). Occupancy for out of school care is at a much lower base level in PVI group care settings and childminders and occupancy has only partially recovered by autumn 2023 at 36% and 30% respectively. The government has confirmed funding for the Holiday Activities and Food Programme (HAF) over the next three years and there are opportunities for greater engagement from Newham Out of School providers across the HAF and expanded wraparound programmes.
- Charges for after school and breakfast services in Newham have increased and are on a par with London averages. Charges vary between provider types, with childminders and PVI Out of School Clubs often offering more hours and flexibility but making a higher hourly charge. Help with childcare costs and funded provision via the HAF programme is available for eligible parents to access at Ofsted registered provision and parents need to be made aware of this, together with information on what provision and services are available.

#### **1.4 Gap analysis and recommended actions for 2024/25**

This assessment of childcare sufficiency in the borough has found the challenges and gaps detailed below. Recommended actions are shown against each identified gap and a detailed action plan will be put in place against each recommendation.

##### **1.4a Funded Early Education and Childcare Entitlement Expansion**

In 2023/24, the pattern of improving take up of the existing entitlements continued in Newham. The announcement of a new expanded childcare offer starting in April 2024 brings an opportunity for around 2,500 new children and families to benefit from funded early education in Newham during 2024/25. To enable this, parents must be supported and encouraged to apply and providers must be recruited to offer places and create additional quality capacity to meet the needs of working families.

##### **Funded Entitlement Recommended Actions for 2024/25**

- To recruit or create additional capacity for the new scheme including providing information packs and new briefings for settings wishing to explore offering funded places for children from 9 months plus from September 2024.

- To identify areas of need for the creation of new funded places and run a capital funding round to support the creation of new places for the new scheme
- To actively engage with childminders to support and encourage them to offer funded entitlement places.
- To work with providers to adapt service offers to meet working parents childcare needs. Encourage a mix of delivery that includes part week delivery or stretched offers over the full year, where there is demand for this.
- To deliver training packages for settings around quality and SEND to ensure best practice in delivery.
- To continue to brief relevant parent facing professionals on the new and existing funded entitlements and other help with childcare costs.
- To run a termly promotional campaign focusing on each of the funded entitlements over 2024/25.
- To update the new starter packs for providers new to delivering funded early education
- To deliver refresher briefings for staff administering the funded entitlements in early education and childcare settings.
- To support providers with the administration processes around eligibility and funding, working to reduce the administrative burden of operating as a funded entitlement provider.
- To monitor provider participation across all the funded entitlements, ensuring there remains sufficient capacity to meet peak demand for each scheme.
- To work with providers to ensure that when children transfer between providers a smooth transition is made in the best interests of the child.

#### **1.4b New Wraparound Offer for Primary Aged Children**

There will be a strong focus on the creation of more wraparound places for primary aged children, starting from September 2024. This expansion is designed to support work and the childcare hours that will allow work.

##### Wraparound Offer Recommended Actions for 2024/25

- To recruit to a Wraparound Coordinator post to oversee the co-ordination of wraparound services, including operational leadership of revenue and capital funding programmes.

- To set up a steering group to oversee the planned implementation of the programme
- To develop capital and revenue packages of support for wraparound providers creating new wraparound places.
- To complete and refresh demand and supply mapping for the wraparound care expansion programme.
- To develop, trial and evaluate different delivery models to meet working family's needs
- To work with all relevant provider types to ensure there is opportunity to engage with the expansion
- To develop a training offer for quality and SEND to ensure best practice in the delivery of places
- To develop wraparound communication plan, promoting the emerging offer to parents and engaging with key stakeholders such as Job Centre Plus and Newham Work.

#### **1.4c Quality**

##### Quality Recommended Actions 2024/25

- Early Years Advisory Teachers (EYATs) and Newham Early Education Practitioners (NEEPS) to continue to fulfil their statutory duty to support practice development in all new settings and those with an Ofsted grade less than good. This will include a specific programme of CPD and intensive support through individual action plans following setting visits.
- To monitor settings termly, taking in to consideration sustainability, staff changes and safeguarding, identifying any settings at risk
- Settings due Ofsted, and those identified as 'at risk' to receive support from EYATs and NEEPS
- The continue universal support to all providers through our professional development (CPD) programme, following consultation with providers, forums, networks and audits.
- To realign the Pathway to Quality improvement tool to Healthy Early Years London

#### **1.4d Workforce**

Newham providers continue to identify workforce recruitment and retention as one of their biggest business challenges. It is also acknowledged by the Department of Education as a national issue. Early education and childcare is a people based business and all providers rely

heavily upon the quality and availability their workforce to provide a quality service. The success of the new expanded childcare offer is strongly reliant on the recruitment and retention of a motivated high quality workforce.

#### Workforce Recommended Actions 2024/25

- To include in our communications plan a social media campaign to promote the early years sector and careers
- To raise awareness of the Government’s new childcare workforce recruitment campaign
- To monitor the impact of strategies, such as the implementation of a vacancy page for providers to promote vacancies in their settings
- To keep abreast of best practice solutions in the recruitment and retention of early years and childcare workforce and share practical solutions and approaches with providers. .
- To participate in the DfE Recruitment and Retention strategy group.
- Link to Job Centre Plus and local colleges and secondary schools to explore options for collaboration around apprenticeships and work pathways in early education and childcare

#### 1.4e Information

Awareness of funded early education and other help with childcare costs has improved in Newham in recent years. For families to benefit from the new expanded childcare offer a new strand of promotion will be required. Lack of awareness and misconceptions about the benefits of early education, eligibility and the childcare choices available to support work are barriers to take up. We will continue to benchmark against best practice and innovate to further improve resident awareness of early education and childcare options.

#### Information Recommended Actions 2024/25

- To refresh Newham’s early year’s communication plan, taking into account evidence from monitoring and research of what works in engaging and communicating with families including the most vulnerable.
- To review and further enhance the new “Local Offer” website to ensure parents are able to access suitable specific childcare information that meets their needs.
- To continually strive to simplify the parents’ customer journey and offer handholding support where appropriate. Including increasing our use of social media, direct messaging, community language content and parent workshops.
- To add new strands to our early years marketing strategy to include the new funded entitlement scheme for under 3s and expanded wraparound offer for primary aged children.

- To continue to ensure that local sources of advice and support such as Families Information Service, Childcare providers, Health Visitors, Children’s Centres, Job Centre Plus, and Newham Work are aware of and disseminate the latest information. This will include briefings to strategic leads as well as parent/ carer facing staff and will include the regular distribution of relevant marketing materials.
- To promote the government’s websites [www.childcarechoices.gov.uk](http://www.childcarechoices.gov.uk) and [www.gov.uk/childcare-calculator](http://www.gov.uk/childcare-calculator) to parents and providers.
- To raise awareness of the range of childcare options that are available to meet different parent needs including the stretched offer, flexible care available through some childminders or partnership delivery and services available to shift and weekend working parents.
- To facilitate the sharing of provider information to parents with regard to how they support SEND, language development, cultural, faith and belief needs.
- To provide a frontline telephone information and support service assisting families navigate the different childcare pathways and signposting to entitlements available to them
- To continue to deliver outreach to relevant community groups and partners where families can be engaged, raising their awareness of the early education and childcare offer.

#### 1.4f SEND

The number of children presenting with SEND is increasing and includes a wide range of needs including autism, social communication needs and speech, language and communication delay. The Local Authority has a duty to support early year’s providers in the borough to identify, plan and support provision for the increasing number of children with SEND. Parents are well informed and supported to access the range of services on offer, resulting in better customer experience and easy access to information being sought.

#### SEND Recommended Actions 2024

- Continue to develop and enhance the Local Offer, taking into account parental feedback.
- Continue to ensure children receive the additional support that is their right, providers are supported to offer appropriate and effective support from the Area SENCO team, and through a relevant CPD offer
- Continue to promote the use of the early notification process with colleagues from early help, education and health.
- Continue to use data to inform improvements and embed systems to capture the scale of SEND so that provision can match need, resulting in a consistent approach to the allocation of services and funding.

- Continue to collect data and use this to inform future planning and strategy sharing information with colleagues from Education and SEND.

### **1.4g Sustainability**

The expansion of childcare support that is now being planned by Government is an opportunity for many providers to grow their childcare offer. For some providers the changes will be a threat to their current business model. Providers will need to be agile and proactive and adapt their business models to respond to changes in the childcare market to ensure sustainability. The Local Authority can play a part in informing and supporting providers to make necessary changes to adapt to new developments.

#### Sustainability Recommended Actions 2024.25

- To ensure childcare continues to be appropriately prioritised in the economic plan of the Council.
- To continue to update and review Newham's Early Years risk register in order to monitor and provide practical support and solutions for providers facing sustainability challenges, where possible.
- To provide termly updates on the demand and supply of childcare, sharing the findings with strategic leaders, childcare providers and partners.
- To ensure new starters are appropriately briefed about the opportunities and challenges in the childcare market and are made aware of the differing availability of childcare in each part of the borough.
- To gather intelligence and share information with providers on any funding opportunities and business support that is available.
- To ensure providers are made aware of the capital and revenue streams available to support the Governments childcare expansion schemes.
- To develop and share case studies on changing demand in childcare with practical suggestions for providers to increase occupancy.
- To review the business support and guidance that is available to childminders in Newham, with a view to developing improved practical resources and support which can help the sustainability of good quality childminding.
- To refresh Newham's business health check tool and resource pack and share with providers.



## 2. Demand for services

Factors that influence the take up of childcare are complex and interrelated. The population profile of the borough provides a baseline catchment of potential users of early education and childcare at borough and ward level.

A range of factors will influence the level of childcare take up. Personal preferences, child needs, employment, work patterns, income, locality, family structure and support networks; information and knowledge of what is available all contribute to how many families use services. In 2024 the expansion of funded childcare for children under three and increased support for wraparound childcare for children of school age are likely to boost participation in childcare. The key factors influencing the demand for services in Newham are considered in section 2 below.

### 2.1 Population Economic and social conditions

#### 2.1a Population Profile

Newham has a young and ethnically diverse population, with over one-third of the population under 25 years old, 72% of our residents from Black, Asian and Ethnic Minority communities and over a hundred different languages spoken on our streets.<sup>3</sup>

The 2021 UK Census data recorded Newham's population as 351,100, which is a 14% increase from the 307,984 recorded in the census 2011. Ward and child population datasets used in this report come from Greater London Authority Housing Led-Borough Preferred Option (BPO) Projections for 2023.<sup>4</sup>

#### Child population in each year

The early year's child population at each age is shown below in table 1. There are 23,614 children that may require early years early education and childcare.

Table 1 Population number by age 0-4

Age	Number of children
Under 1	5,101
Age 1	5,143
Age 2	4,411
Age 3	4,463
Age 4	4,496
Total 0-4	23,614

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<sup>3</sup> <https://www.newham.info/wp-content/uploads/2021/07/State-of-the-Borough-2021-1.pdf>

<sup>4</sup> <https://data.london.gov.uk/dataset/housing-led-population-projections> 2023

### Population of school age children

The school age children in each year are shown below in table 2 and these children may require childcare before and after school, and/or during the school holidays. There are 46,796 children are aged between 5 and 14 years old. The total child estimate for 0-14 year olds is 70,410 in 2023.

Table 2 Population number by age 5-14

Age	Number of Children
Age 5	4,519
Age 6	4,585
Age 7	4,651
Age 8	4,563
Age 9	4,716
Age 10	4,749
Age 11	4,779
Age 12	4,706
Age 13	4,809
Age 14	4,718
Total 5-14	46,796

### Under 5s Ward Analysis and Future Projections

Table 3 shows projected under 5 populations at ward level over the period 2023 to 2032. It should be noted that forecasts are not certainties, as information and future trends are subject to change. The child population analysis shown is against the new ward boundaries that were introduced in May 2022, these can be viewed in map 1.

Map 1

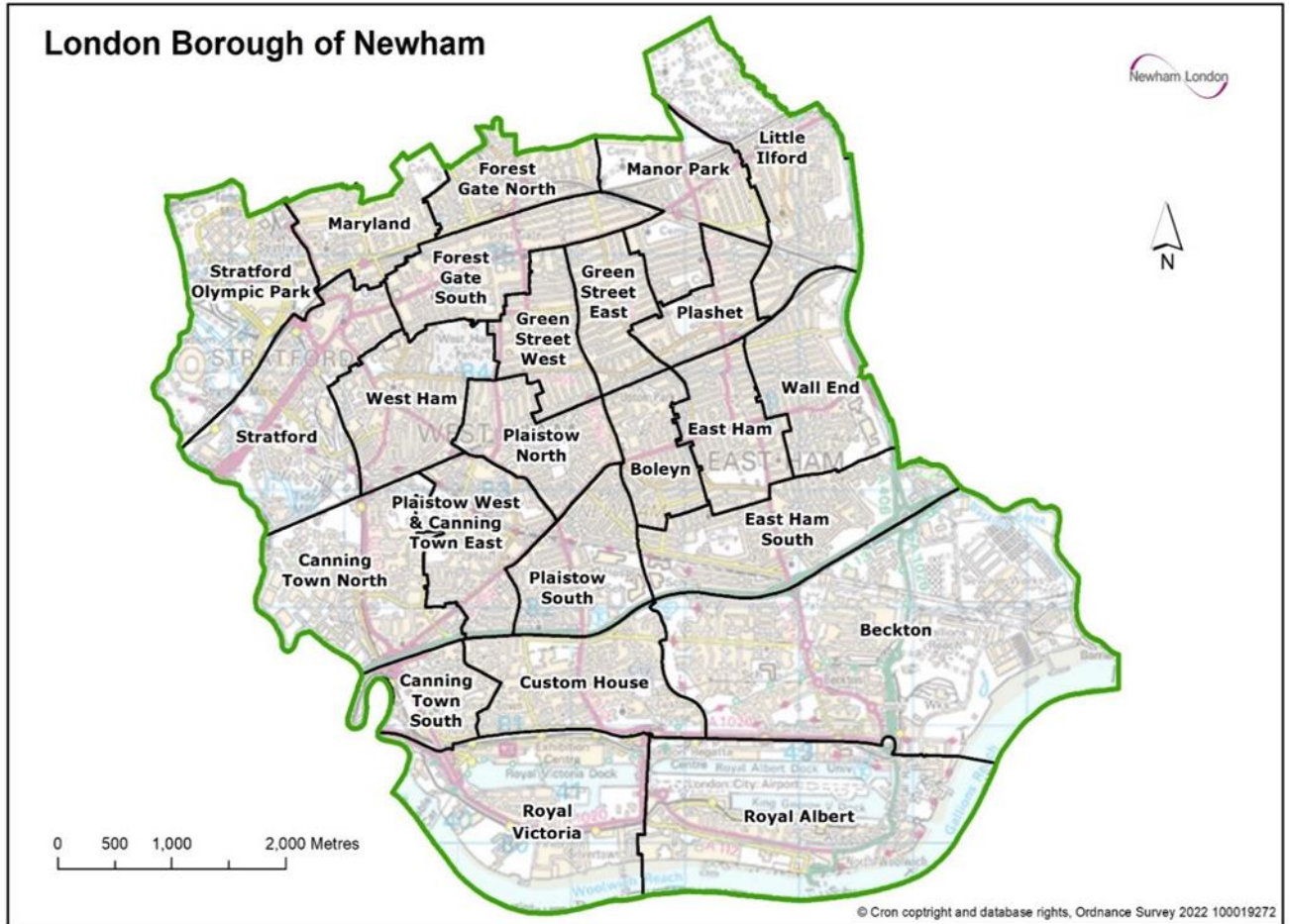


Table 3

GLA population projections for Newham 0-4 Year Olds				Projected change	Projected change
Ward	2023	2028	2033	2028	2033
Beckton	937	1168	1638	232	701
Boleyn	1088	1103	1053	15	-35
Canning Town North	585	935	1108	350	523
Canning Town South	366	407	439	41	73
Custom House	1096	1215	1299	119	203
East Ham	1143	1287	1388	144	245
East Ham South	1323	1282	1270	-41	-53
Forest Gate North	771	760	745	-12	-26
Forest Gate South	1310	1376	1418	66	109
Green Street East	1284	1282	1242	-2	-42
Green Street West	1039	1043	1054	4	15
Little Ilford	1418	1401	1382	-18	-36
Manor Park	1190	1190	1193	-1	2
Maryland	597	581	578	-15	-19
Plaistow North	1189	1166	1150	-23	-39
Plaistow South	984	923	908	-61	-76
Plaistow West & Canning Town East	1115	1000	972	-115	-143
Plashet	848	798	777	-49	-70
Royal Albert	728	860	999	132	271
Royal Victoria	1193	1592	1859	399	666
Stratford	811	1278	1692	468	881
Stratford Olympic Park	629	750	779	121	150
Wall End	1114	1078	1075	-36	-39
West Ham	857	836	852	-21	-5
<b>Grand Total</b>	<b>23614</b>	<b>25309</b>	<b>26870</b>	<b>1695</b>	<b>3256</b>

% change against 2023	7.2	13.8
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The number of children aged between 0-4 is projected to increase by 7.2% by 2028 and by 13.8% by 2033. Over the next ten years the most significant increases are projected for the wards of Stratford (+881), Beckton (+701), Royal Victoria (+666) and Canning Town North (+523). Where there are declines these are much less significant, with the largest declines predicted for Plaistow West and Canning Town East (-143), Plaistow South (-76) and Plashet (-53).

## 5 – 14 Ward Analysis and Future Projections

Table 4 shows projected shows projected populations for 5-14 year olds at ward level over the period 2023 to 2033.

The number of 5-14 year olds in Newham is projected to decrease by -4.6% by 2028 and by -5.1% by 2033. Over the next ten years increases in 5-14 children are expected in Stratford (+1,171), Royal Victoria (+778) and Canning Town North (+ 635). However these are more than offset by reductions across sixteen wards, with the largest falls being projected for Wall East Ham South (-556), Plaistow West and Canning Town (-544) and Wall End (-537).

Table 4

GLA population projections for Newham 5 - 14 year olds				Projected change	Projected change
	Ward	2023	2028	2033	2028
Beckton	2090	1975	2343	-116	252
Boleyn	2216	2042	1883	-174	-333
Canning Town North	1245	1603	1880	358	635
Canning Town South	757	800	829	42	71
Custom House	2213	2197	2230	-16	17
East Ham	2308	2268	2299	-41	-10
East Ham South	3040	2665	2484	-375	-556
Forest Gate North	1400	1234	1163	-166	-237
Forest Gate South	2224	2060	2007	-164	-218
Green Street East	2580	2336	2183	-244	-397
Green Street West	2159	1964	1809	-195	-350
Little Ilford	3102	2812	2632	-290	-470
Manor Park	2419	2163	2056	-256	-363
Maryland	1355	1189	1070	-166	-285
Plaistow North	2367	2122	1960	-245	-407
Plaistow South	2031	1754	1643	-277	-388
Plaistow West & Canning Town East	2404	2087	1860	-318	-544
Plashet	1611	1450	1329	-160	-282
Royal Albert	1295	1302	1375	7	81
Royal Victoria	1126	1526	1904	401	778
Stratford	1415	1987	2586	572	1171
Stratford Olympic Park	1112	1319	1367	207	255
Wall End	2564	2206	2026	-358	-537
West Ham	1762	1583	1495	-180	-268
<b>Grand Total</b>	<b>46796</b>	<b>44644</b>	<b>44412</b>	<b>-2153</b>	<b>-2385</b>

% change against 2023
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-4.6	-5.1
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### **Fertility and birth rate**

In line with many Boroughs, there had been a rapid increase in births up to 2012. This trend has now reversed, with births on a reducing trajectory nationally and locally. There was a fall in births in Newham by 880 to 5,346 births or -14% for the calendar year 2021 compared to calendar year 2015. Nevertheless, the fertility rate in Newham of 1.8 remains higher than for England, which is 1.61.<sup>5</sup>

### **Population Mobility**

Population churn is high in Newham. In the last available dataset 2019-20, 14.4% of the population migrated either in or out of the borough with other parts of the UK<sup>6</sup>. This is significantly higher than the 6.0% for all London Authorities. Additionally Newham continues to see high levels of international migration with an inflow of 11,443 and an outflow of 4,769 in 2019-20.

### 2.1b Prosperity and work

Based on the 2019 Indices of Deprivation (ID), Newham is the 12<sup>th</sup> most deprived area in England and the 3<sup>rd</sup>. most deprived in London. Comparatively Newham is moving in a positive direction; however, Newham remains within the worst 10% in terms of deprivation in the country.

### Employment

The use of childcare and particularly fee-paying childcare is strongly linked to work and the ability to pay.

Table 5 shows that 73.2% of Newham resident adults were economically active in 2022/23, There were 70.7% in employment. This is lower than the in employment rate for either London (74.6%) or Great Britain (75.8%). For economically active women in Newham, the in employment rate was lower at 60.9%. The availability of affordable quality childcare is a barrier to work for women in particular.

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<sup>5</sup> ONS Nomis Live Births in England and Wales Local Authority Local Area

Office for National Statistics Local Area Migration Indicators UK September 2021

Table 5

Labour Supply				
Employment and unemployment (Oct 2022-Sep 2023)				
	Newham	Newham	London	Great Britain
	(Numbers)	(%)	(%)	(%)
All People				
Economically Active†	188,900	73.2	78.5	78.8
In Employment†	182,700	70.7	74.6	75.8
Employees†	152,200	59.2	62.8	66.3
Self Employed†	30,500	11.6	11.6	9.2
Unemployed (Model-Based)	10,000	5.2	4.8	3.7
Females				
Economically Active†	81,000	64.7	74.5	74.9
In Employment†	76,400	60.9	70.9	72.3
Employees†	70,300	55.9	62.4	65.4
Self Employed†	#	#	8.3	6.7
Unemployed§	#	#	4.6	3.4
Source: ONS annual population survey				
# Sample size too small for reliable estimate				

### Median earnings for Newham residents

The median full-time weekly income for Newham residents in 2022 was £709, lower than the London weekly average of £767 but higher than the average for England and Wales of £645.<sup>7</sup>

#### 2.1c Ethnic Diversity

Newham is a highly diverse borough. The census 2021 shows that 85.2% of Newham's residents are from a background other than White British. The proportions of Black African, Pakistani, Indian and Bangladeshi residents are higher compared to London, with the Asian broad ethnic group accounting for 42.2% of residents, followed by White 30.8%, Black 17.5%, other ethnic group 4.9% and mixed/multiple ethnic groups 4.7%. The proportions these broad ethnic groups make up in Newham's population are not forecast to change substantially by 2030.

<sup>7</sup> Annual Survey of hours and earnings (ASHE) 2022

Table 6: Census 2021 Newham Population Ethnic groups

2021 Census Newham Population by Ethnic Group	Population 2021	% of Total Population 2021 Census	% of Total Population 2011 Census	% change between 2011 and 2021
White British	51,819	14.8%		
White Irish	2,039	0.6%		
White Other	54,089	15.4%		
<b>White Sub Total</b>	<b>107,947</b>	<b>30.8%</b>	<b>29.0%</b>	<b>1.8%</b>
White and Black Caribbean	4,253	1.2%		
White and Black African	3,317	0.9%		
White and Asian	3,324	0.9%		
Other Mixed	5,525	1.6%		
<b>Mixed / Multiple ethnicity Sub Total</b>	<b>16,419</b>	<b>4.7%</b>	<b>4.5%</b>	<b>0.2%</b>
Indian	38,642	11.0%		
Pakistani	31,216	8.9%		
Bangladeshi	55,677	15.9%		
Chinese	6,213	1.8%		
Other Asian	16,439	4.7%		
<b>Asian Total</b>	<b>148,187</b>	<b>42.2%</b>	<b>43.5%</b>	<b>-1.3%</b>
Black African	40,874	11.6%		
Black Caribbean	13,586	3.9%		
Other Black	6,842	1.9%		
<b>Black Total</b>	<b>61,302</b>	<b>17.5%</b>	<b>19.6%</b>	<b>-2.1%</b>
Arab	3,534	1.0%		
Other Ethnic Group	13,641	3.9%		
<b>Other Total</b>	<b>17,175</b>	<b>4.9%</b>	<b>3.5%</b>	<b>1.4%</b>
<b>Total All</b>	<b>351,100</b>	<b>100.1%</b>	<b>100%</b>	

## Language

The 2021 Census showed that 65.4% of Newham residents speak English as their main language. This is significantly lower than London at 78.4%, or England and Wales at 96.7%.<sup>8</sup> Language barriers can lead to problems accessing services. There is a high number of languages spoken in Newham, with over 100 languages recorded.

Figure 1 shows the top ten language support requests to the Newham Language Shop and shows a general increase in interpreting use.

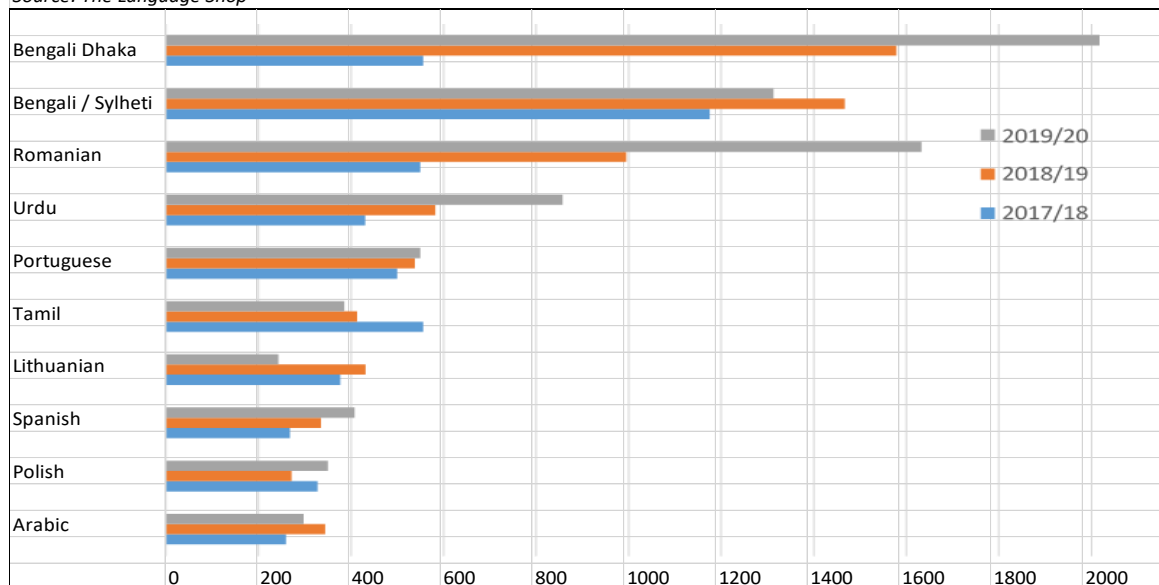
<sup>8</sup>[https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/bulletins/languageenglandandwales/census2021#:~:text=Main%20points,-This%20page%20is&text=In%202021%2C%2091.1%25%20\(52.6,49.8%20million%2C%20in%202011\).](https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/bulletins/languageenglandandwales/census2021#:~:text=Main%20points,-This%20page%20is&text=In%202021%2C%2091.1%25%20(52.6,49.8%20million%2C%20in%202011).)



**Figure 1**

Top 10 Languages requested by LBN for interpretation and translation purposes

Source: *The Language Shop*



There is a rich diversity of languages spoken in Newham. In the 2011 Census Newham was the second most linguistically diverse London borough after Hillingdon, with 103 languages recorded. Findings from Census 2021 will provide a further update when these are made available.

### 2.1d Housing and Economic Regeneration

Newham is a multi-centric borough with major town centres located at Stratford in the north-west, and East Ham towards the east, and important district centres at Canning Town to the west, Forest Gate to the north, Green Street towards the centre, and East Beckton to the south-east.

Significant economic regeneration projects continue to reshape the borough with a large supply of brownfield development to help meet its targets for new housing and economic growth. This is concentrated mainly in the 'Arc of Opportunity'. This area is the primary focus for new job creation, infrastructure development, new town and local centres, and the vast majority of new housing on large sites in Beckton, the Royal Docks, Canning Town and Custom House, West Ham and Stratford. The revised draft of the London Plan (March 2021) published by the London Mayor's office has at target of 522,870 new homes to be completed across London over the next ten years. Newham has the second highest housing target of 32,800 homes.

## **2.2 Demand implications - Expanded Funded Entitlements Initiative**

An expansion of funded early education for working families with children under three is being implemented from April 2024. This is an expansion of the 30 hours scheme already available to working families with children aged three or four. New funded places are being

made available in phases as follows:

- From April 2024 eligible working families with children aged two can get 15 hours per week (570 hours over a year)
- From September 2024 eligible working families with children from 9 months can get 15 hours (570 hours over a year)
- From September 2025 eligible working families with children from 9 months upwards can get 30 hours (1140 hours over a year)

Our analysis of the likely impact on demand across the first two phases of implementation in 24/25 is shown at Table 7 below. It is anticipated that some 2,500 children will be accessing funded childcare in this age range for the first time in 2024/25. The majority of these children are expected to be converting from using existing paid childcare (1,950), but the scheme is expected to also attract new families to take up registered childcare. This will mean new additional demand estimated at around 550 15-hour places in 2024/25. Latest application data from Newham parents in March 2024 suggests actual take up at the launch of the scheme is broadly in line with these estimates. Our survey of parents indicates that most eligible working families will be looking for year round provision, but for around one third of families a term time offer suits their needs. There is also demand for places across all provider types including childminders, pvi group care settings and schools where places are offered.

Table 7

Expanded Funded Entitlement 2024/25	Total Indicative take up once established	Converters switching from paid to funded hours	New to accessing early education and childcare
Working families with 2 year olds (from April 2024)	1,300	1,000	300
Working families with children 9m to 2 (from Sept 24)	1,200	950	250

The number of funded hours available to eligible parents of children under three will double to 30 hours in September 2025. At that point, we expect a significant increase in demand through families already accessing funded childcare now increasing their hours, as well as more families new to using registered childcare coming forward as the scheme becomes more established. Further work is planned to monitor demand and prepare strategies to support place creation where needed, particularly in relation to the final phase of implementation.

### **2.3 Demand implications Wraparound care initiative primary school aged pupils**

A new Government initiative aims to increase parent/carer access to the labour market by increasing the number of wraparound childcare places for primary-aged children available and taken up between 8am and 6pm (term time). The intention is to make more places available so that there is a wraparound service for all families of primary aged children that

need a place.

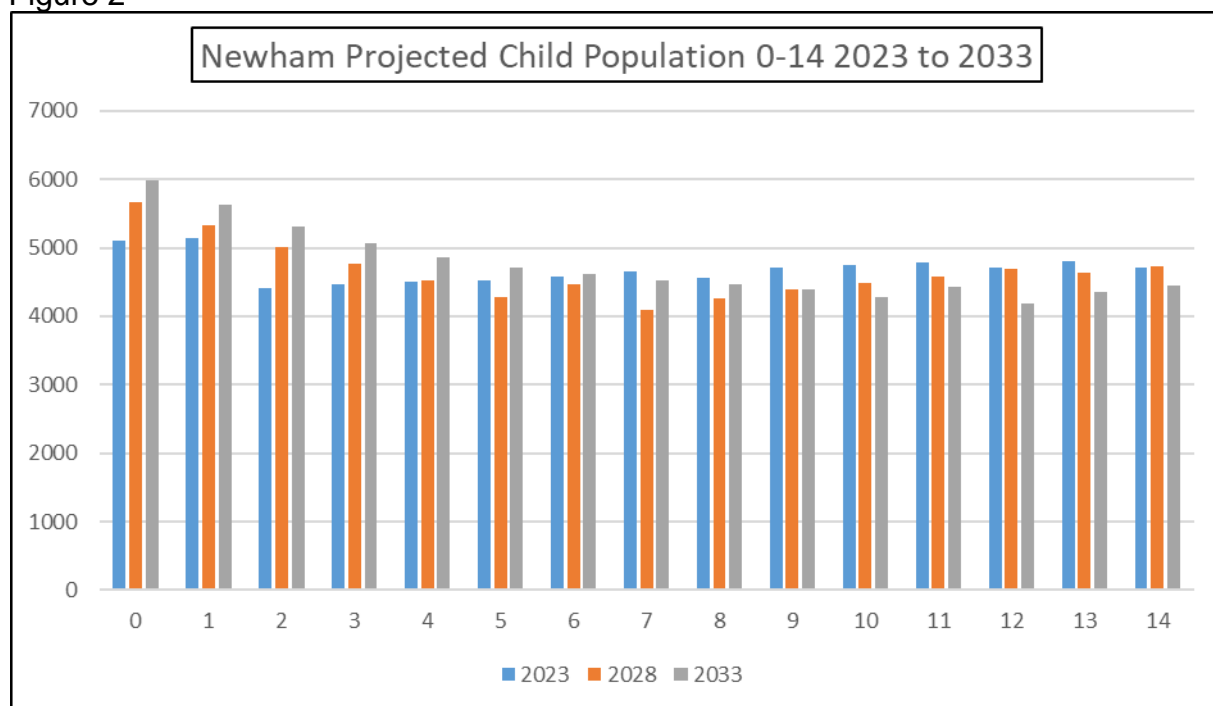
The first priority will be to increase the supply of places in areas of unmet or latent demand and the Local Authority has been granted revenue and capital funding to support the development of places where they are needed. The availability of good quality, reliable wraparound care, together with improved coordination and marketing of services and improved awareness of the help the parents can get with the costs of childcare, are intended to stimulate demand.

More wraparound places are expected to start becoming available in September 24, with the project being fully implemented by the end of 2025.

## 2.4 Child age profile and geographical distribution

Figure 2 shows the individual year breakdowns by age for Newham over 2023 to 2033. Over the period, there remain more children in the younger age ranges with an increase in younger children (0-5) being predicted by 2033, while older children age range (5-14) sees a modest decline.

Figure 2

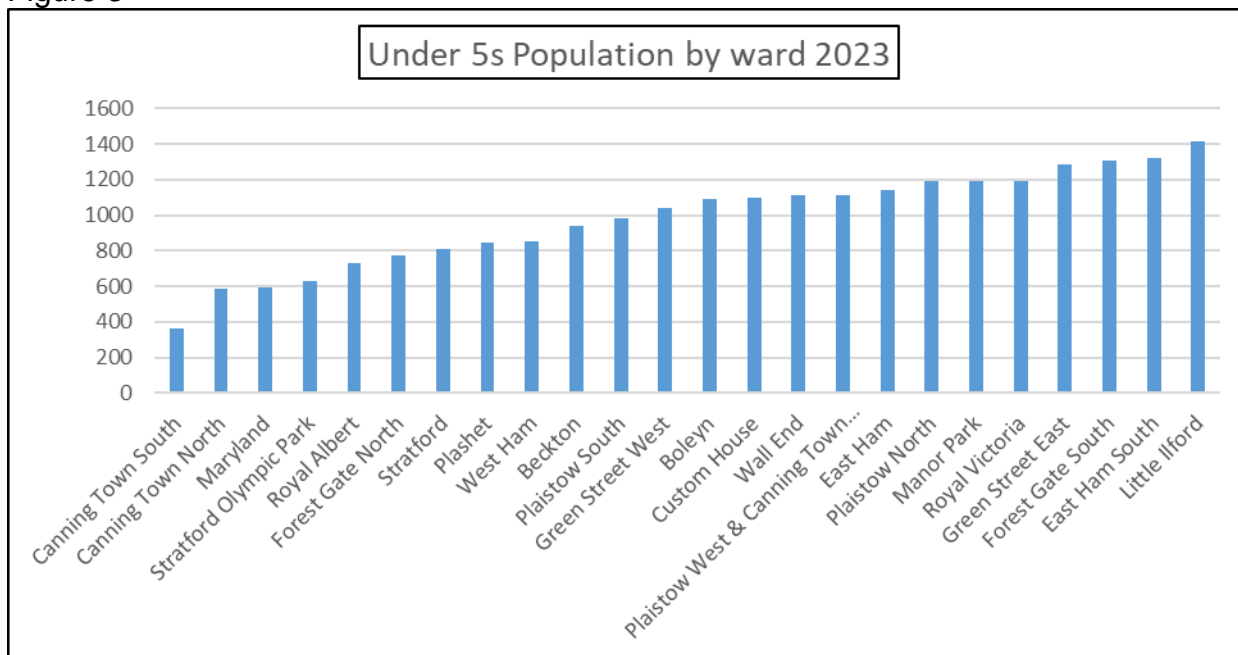


The borough is made up of 24 wards and sufficiency data that follows in this report is supplied at ward level.

The under-five population per ward is shown at Figure 3. The most populated wards are Little Ilford, East Ham South, Forest Gate South, Green Street East and Royal Victoria. There is a wide variation in the number of 0-4 children in each ward. There are more than three times as many 0-4 children in Little Ilford than in Canning Town South, the ward with the least 0-4 children. Other wards with lower numbers are Canning Town North, Maryland and Stratford Olympic Park.

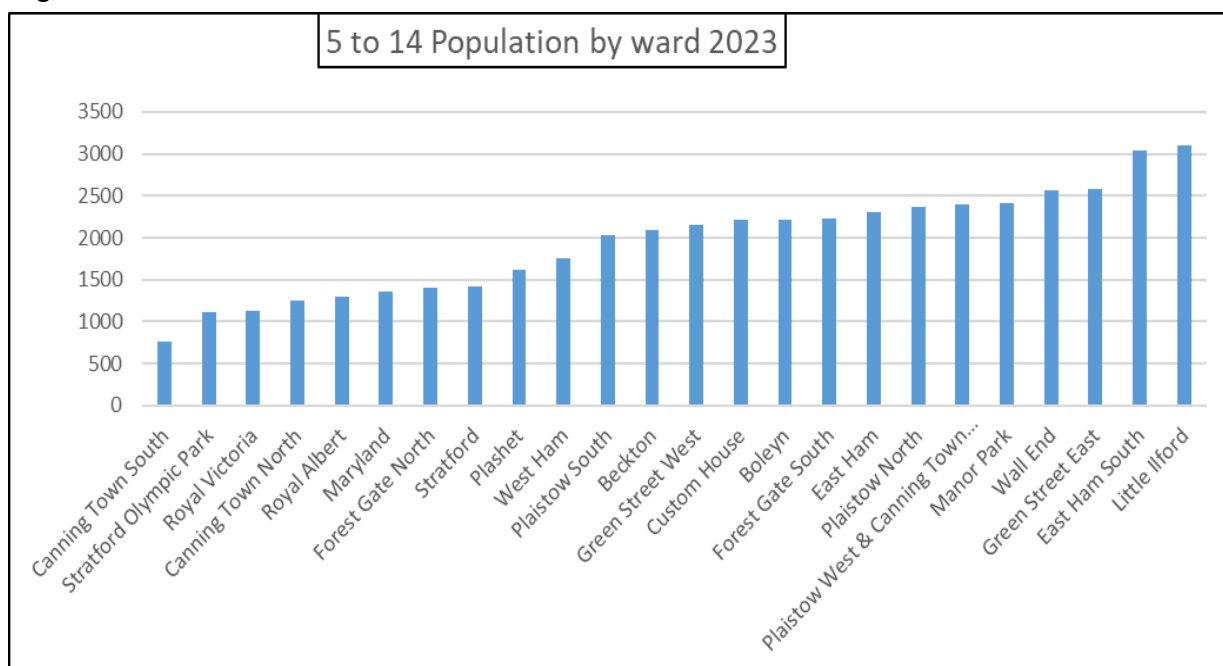
Redevelopment is projected to see significant increases in 0-4 children in Stratford, Beckton, Royal Victoria and Canning Town North over the next ten years.

Figure 3



The 5 to 14 population per ward is shown at Figure 4. The most populated wards are Little Ilford, East Ham South, Green Street East, Wall End and Manor Park. The wards with the lowest numbers are Canning Town South, Stratford Olympic Park, Royal Victoria, Canning Town North and Royal Albert. On-going regeneration in Stratford, Royal Victoria, and Canning Town North wards, will see growth in 5 to 14 population in these areas over the next ten years. Most other wards will see a decline.

Figure 4



## 2.5 Demand for Early Education and Childcare, Families of children with Special Education Needs or Disabilities SEND)

Estimating the numbers of Newham children with SEND.

Children and young people with SEND are entitled to support with childcare up to the age of 18. The number of children with an Education, Health and Care (EHC) plan in our local authority, as reported to the Department for Education in January 2023 is shown in Table 8 below. The total number of children with an EHC plan increased by 64.9% to 2,459, from 1,491 in 2022, with increases across the 0-19 age range. In England the number of children and young people with EHC plans increased by a significantly smaller, but still substantial 9% in 2023. The number of children and young people with an EHC plan in Newham has more than tripled since 2018. This is in part a reflection of LBN establishing its process for the EHC needs assessment, in response to SEND code of practice reforms.

Table 8

Children and young people with EHC Plans in Newham						
Age	Number of children 2023	Number of children 2022	Number of children 2021	Number of children 2020	Number of children 2019	Number of children 2018
Under age 5	110	76	63	37	22	7
Aged 5 to 10	1016	700	521	419	209	144
Aged 11 to 15	856	664	553	424	285	260
Aged 16 to 19	477	51	51	334	300	300
<b>TOTAL</b>	<b>2459</b>	<b>1491</b>	<b>1188</b>	<b>1214</b>	<b>816</b>	<b>711</b>

In addition a further 884 children aged 0-4 and 5,704 aged 5-14 were recorded as receiving SEN support but without an EHC plan at census 2023. The most common type of need for those with an EHC plan is Autistic Spectrum condition and for those with SEN support, Speech, Language and Communication needs.

## 2.6 Parents views on the provision of childcare

Information on parents' views and access to services has been included from a survey of Newham parents, which was conducted in autumn 2023 and received 582 responses.<sup>9</sup> This is supplemented by findings from the most recent DfE national parent survey July 2023.<sup>10</sup> Where parents' views have been captured and relate to the expansion of funded childcare for children under three, these have been detailed at 2.2.

<sup>9</sup> Newham on line parent survey conducted September – December 2022

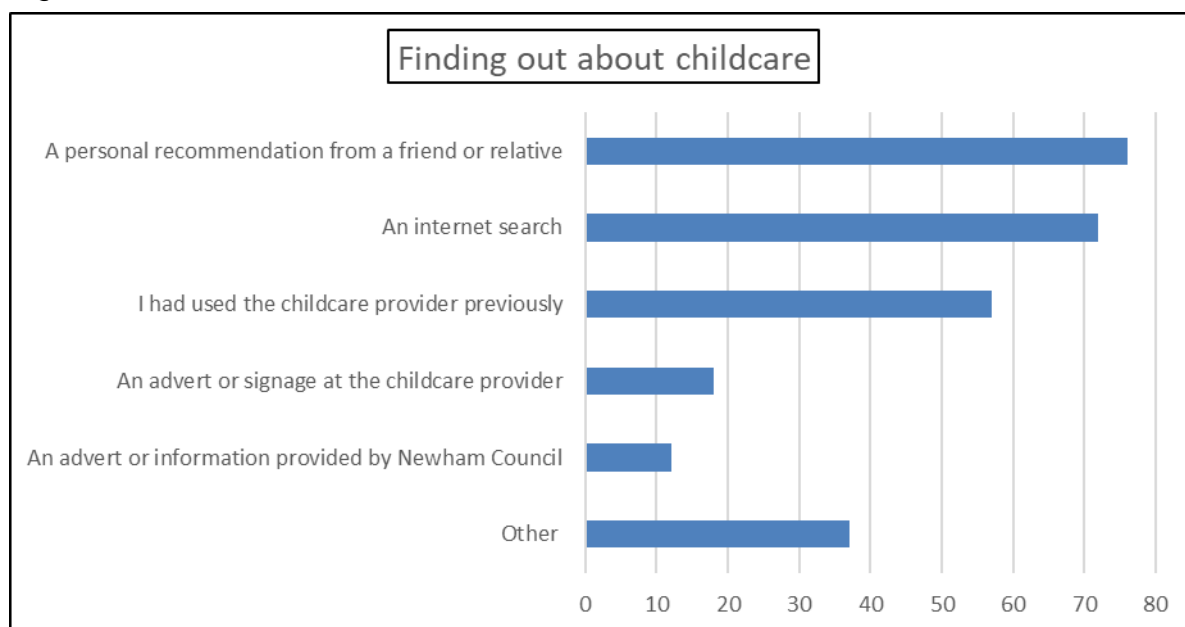
<sup>10</sup> <https://www.gov.uk/government/statistics/announcements/childcare-and-early-years-survey-of-parents-2022>

## 2.6a Finding out about Childcare

In Newham, parents were asked what method they used to find out about childcare. The most common methods identified are shown in figure 4. Personal recommendations remain very important for parents looking to place their child with a setting and the views of other parents was relied on by many as a trusted source of information about childcare. The internet and the use of social media is often an important first step for parents looking to identify their options. Previous experience of a childcare provider is also an important consideration.

Parents use a range of information sources during the process of finding out about and choosing the childcare and many do not make a final decision until a physical visit to one or more providers.

Figure 4



## 2.6b Awareness of help with Childcare Costs

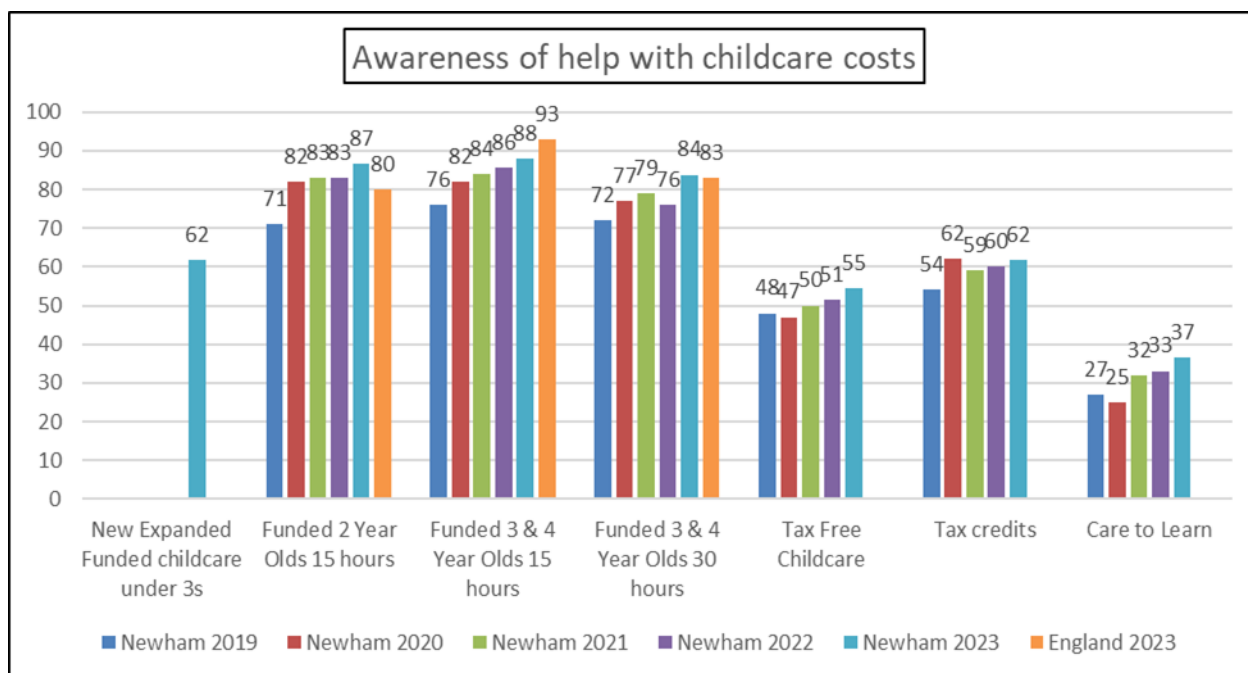
Recent parent surveys carried out in Newham have shown an improving level of awareness of the range of financial help available to help with meeting childcare costs. The Local Authority has put in a range of initiatives to raise awareness. The latest Newham parent survey asked parents about their awareness of specific free and subsidised childcare schemes and the findings show that awareness continues to improve overall as is demonstrated in Figure 5.

Survey results indicate an improved awareness of all funded and childcare subsidy schemes in Newham compared to previous years. Awareness is higher than reported nationally for all the funded entitlement schemes, with the exception of the universal entitlement for three and four year olds. Awareness of the expanded funded childcare offer for children under three, was lower than for the other entitlements at the time of the survey, in Autumn 2023. The Local Authority

has a marketing plan to promote the awareness of this new scheme prior to it being available in April 2024.

Awareness, while improved, remains lower with regard to childcare subsidy schemes, with 62% being aware of childcare element of universal tax credits, 55% were aware of tax-free childcare and 37% aware of the care to learn programme. In March 2022, around three quarters of the 1.3 million families eligible nationally for tax-free childcare were not claiming it. It should be borne in mind that parents completing the Newham survey were self-selecting and parents where English language is not strong would be less likely to have participated in the survey.

Figure 5



### 2.6c Reasons for choosing childcare

In Newham, parents were asked to identify and rank the factors they took into account when choosing childcare. The most important factors identified in order are shown below.

Factors in choosing childcare in Newham in order of importance

- The provider has a good reputation / Ofsted grade
- The cost / affordability of care
- The provider is able to offer the hours and weeks I need
- The location is convenient for home or work
- The provider clearly explains their services and the activities and benefits for my child
- The provider can be flexible in changing the hours that I use
- My child's siblings or friends attend the same provider
- My child's special need is supported
- The provider is previously known to the parent

An earlier DfE national survey found that provider's convenience (62%) and reputation (57%) were the strongest factors overall in choosing childcare, followed by the quality of the care given (51%) the opportunity for the child to mix with other children (51%) and financial considerations (41%).

There are different priorities reported between parents who choose alternative types of formal childcare. For parents choosing childminders for example, the factors of quality of care and trust are most significant, while for parents choosing day nursery and play groups the opportunity to mix is important.

While the Newham and DfE surveys are not directly comparable, there are similarities with the findings. The Newham survey is more recent and highlights factors likely to have been given new prominence to costs and flexibility because of post COVID working patterns and the cost of living crisis.

#### 2.6d Use of childcare

Overall, in 2022, almost three in five (58%) children in England aged 0 to 14 had used some form of childcare, both formal (such as nurseries, childminders, breakfast clubs, and after-school clubs) or informal (such as grandparents, friends or relatives, and older siblings). Formal childcare was used by just over two in five children (47%). This was an increase from 44% recorded in 2021. Younger children were more likely to receive childcare than older children. Among children aged 0 to 4 years 71% had received childcare, compared to 58% among all children aged 0 to 14 years.

Nationally there has been an increase in the percentage of parents of children aged 0 to 4 years only who are finding it difficult or very difficult to meet their childcare costs, from just under a quarter in 2021 (24%) to around a third (32%) in 2022.

Just under three quarters (73%) of mothers with children aged 0 to 14 were in work in 2022, a rise from 71% in 2021. Long-term trends also show an increase in the percentage of mothers working since 2010. Working mothers reported that factors which helped them go out to work included having children at school and having reliable childcare.

In the Newham parent survey of autumn 2023, 50% of responders with children 0-14 had used childcare in the last 12 months, higher than the 47% reported in 2022.

Informal childcare is an increasingly important part of the mix for surveyed parents with a significant portion of parents identifying friends, family or baby sitters as one of the childcare options they use. Those using informal childcare equated to 32% of responders in 2023, up from 30% recorded in 2022. This change, which started in the pandemic, seems to be continuing and is likely to be the result of changes in working patterns and cost of living pressures on families.

Newham parents were asked if they were able to access early year's registered good or outstanding childcare. The vast majority of responding parents indicated



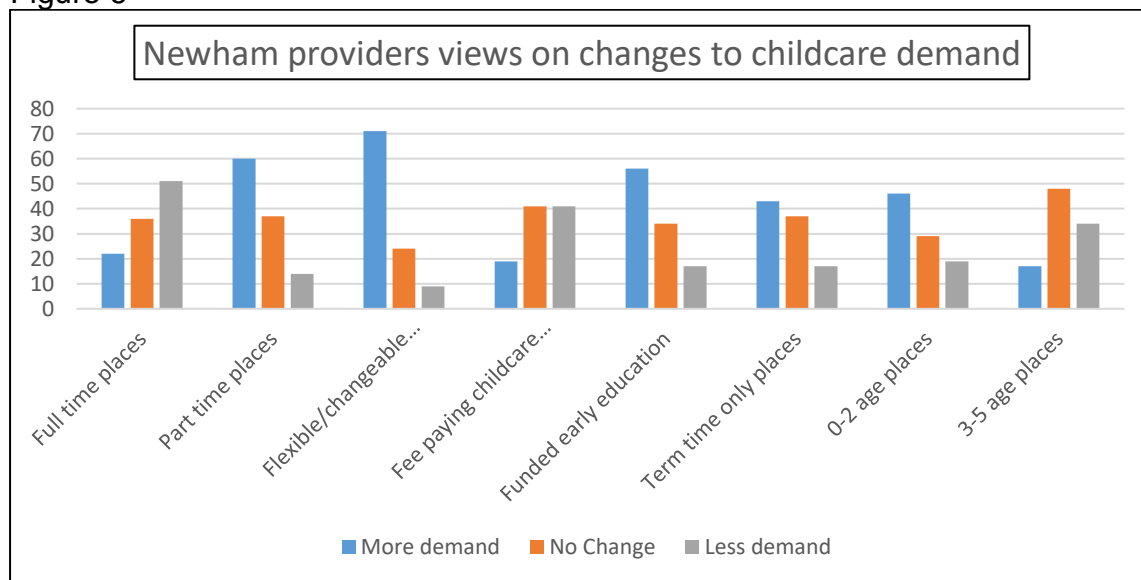
that they had been able to access good our outstanding provision (85%), but this is down from 2022 (88%). A lower proportion of parents recorded that they had been able to access Ofsted registered out of school care services (62%), and this is significantly down from the 77% recorded in 2022.

Nearly three quarters of responding parents said that they were able to access the hours that fully met their needs from their childcare provider (70%), but this is a decline against 2022 (78%). Nearly seven in ten of responding parents said that they had been able to receive childcare services from their preferred provider but this was also a decline (68% down from 82% in 2022). With regard to affordability, less than half of parents said they had been able to access childcare priced within their budget (48%) down from 54% in the CSA 2022), meaning that for a majority of parents affordability was an issue.

Nearly seven in ten (68%) of responders to Newham’s survey 2023 say they are satisfied with their childcare arrangements overall. This is lower than the 81% recorded in the CSA survey 2022.

Newham childcare providers were surveyed about changes in childcare demand in autumn 2023, compared to autumn 2022. Figure 6 shows that for many providers there is more demand for part time places, for more flexible hours, children aged 0-2 and funded early education. Many providers have seen a drop in demand for full time places and fee paying hours. This continues a trend identified in last year’s sufficiency report.

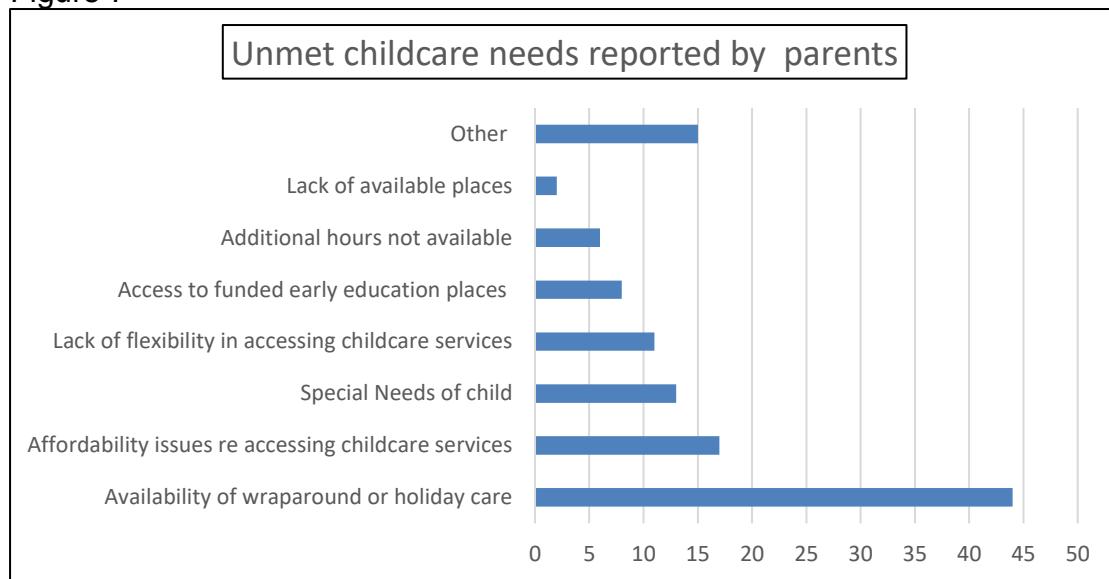
Figure 6



## 2.6e Unmet Childcare Needs

In Newham’s parent survey 2023, just under a quarter of respondents said they had unmet childcare needs (23%). Figure 7 shows the range of needs listed by parents, with wraparound and holiday provision standing out as the biggest unmet need reported.

Figure 7



### 3 Supply of services for under-fives

#### 3.1 Types of registered provision

- The childcare market relies upon a diverse range of providers from the private, voluntary, independent (PVI) and maintained sectors.
- Day nurseries provide full or part-time day care for children aged from birth to 5 years, although not all day nurseries are registered to care for children aged under 2 years. Most are open from at least 8am - 6pm weekdays and commonly operate between 48 and 51 weeks a year. Where maintained nursery schools or schools operate a full day care service these have been included in this category.
- Pre-schools offer day care (under 4 hours) for children aged between 2 and 5 years during school term. Some groups may also offer linked morning and afternoon sessions or places during school holidays.
- Out of School provision can include breakfast, after school and holiday care. Many offer a school pick up and collection service from local schools, nurseries and pre-schools.
- Childminders are registered to look after children in the childminders own home. Childminders are often flexible about the hours they work. Many offer a school pick up and collection service from local schools, nurseries and pre- schools.
- Where the term group care is used in this report, it describes the combination of day nursery, pre-schools and out of school provision. Where the term full time equivalent is used in this report, it relates to a place offered over fifty hours in a week.

#### 3.2 Overall number of places available for under fives

Type of Registered Provider	Newham Places 2019	Newham Places 2020	Newham Places 2021	Newham Places 2022	Newham Places 2023	% Change since 2022
Day care	3577	3886	4220	4360	4478	3.6
Pre School	322	218	199	216	265	
Childminder / childcare on	622	605	515	457	427	-6.6
<b>Total</b>	<b>4521</b>	<b>4709</b>	<b>4934</b>	<b>5033</b>	<b>5170</b>	<b>2.7</b>

The total registered places available for under-fives in autumn 2023 stands at

5,170, as shown in Table 9<sup>11</sup>. This is a marginal increase of 2.7% compared to 2022, there is a reduction in childminder places but this is counteracted by an increase in day care and pre-school places that are now available. The drop in childminder places aligns with the national picture where Ofsted report that a drop of 2,580 registered childminders in the year to August 2023.<sup>12</sup>

The number of registered places represents the maximum number of children who can attend at one time. The table records places for children who are attending full time, or for as many hours as the setting is open. Any Ofsted rated “inadequate” or “not met” providers have been excluded from the number of available places shown.

In addition to the above, most primary schools and all nursery schools in Newham offer part time funded early education places for children aged three and four and in some cases at age two. Places available in these settings across Newham are shown in Table 10.

<b>Table 10 Funded Part Time Places in Schools and Nursery Schools 2023</b>		
Type of Provider	Number of providers	Number of places
Nursery units in primary schools	61	3874
Maintained nursery schools	7	1465
<b>Total</b>	<b>68</b>	<b>5339</b>

Overall places across all providers, including both full time and part time, now total 10,509.

### **3.3 Number of places available in each ward for under fives**

#### **3.3a Group Care places available in each ward**

<sup>11</sup> Newham Child view Dataset November 2022

<sup>12</sup> Main findings: childcare providers and inspections as at 31 August 2023 - GOV.UK (www.gov.uk)

Figure 8

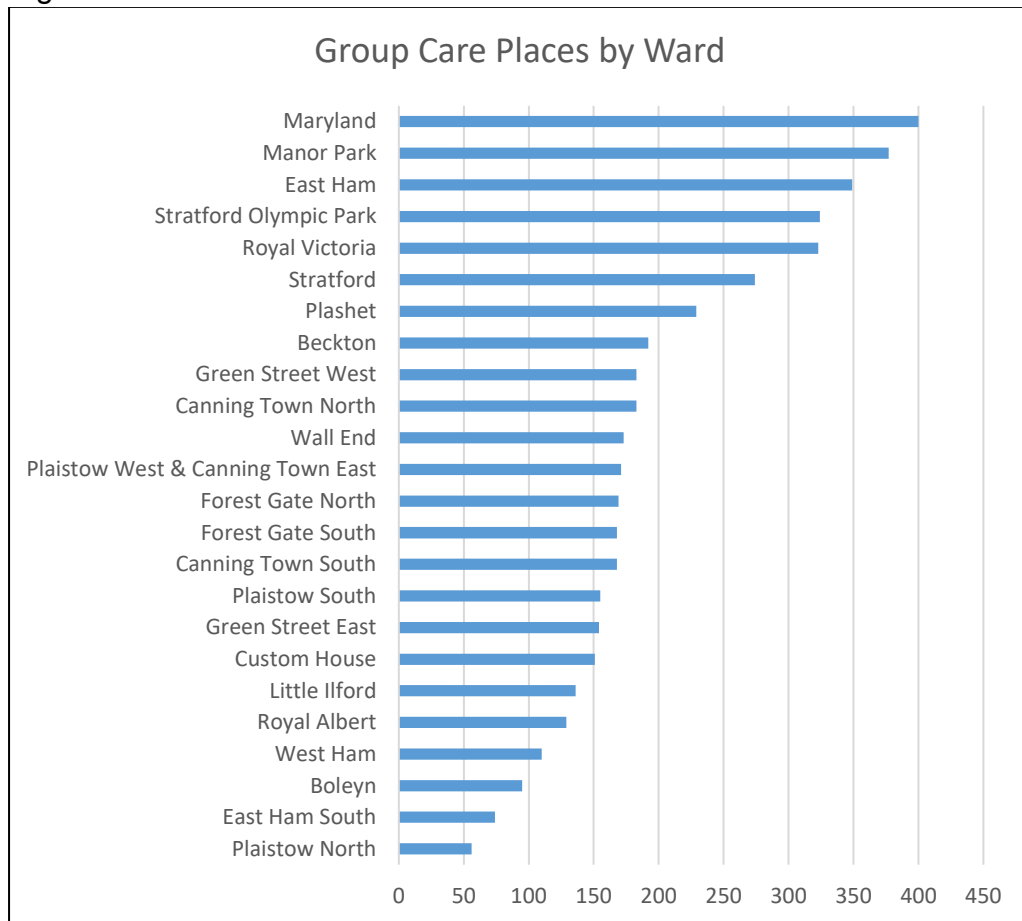


Figure 8 shows the distribution of group care places in the borough. The lowest numbers of places are in the wards of Plaistow North (56), East Ham South (74), Boleyn (95) and West Ham (110). Maryland (400), Manor Park (377), East Ham (349) and Stratford Olympic Park (324) have significantly more places than the borough average of 98 places per ward.

### 3.3b Childminder places available in each ward

Figure 9

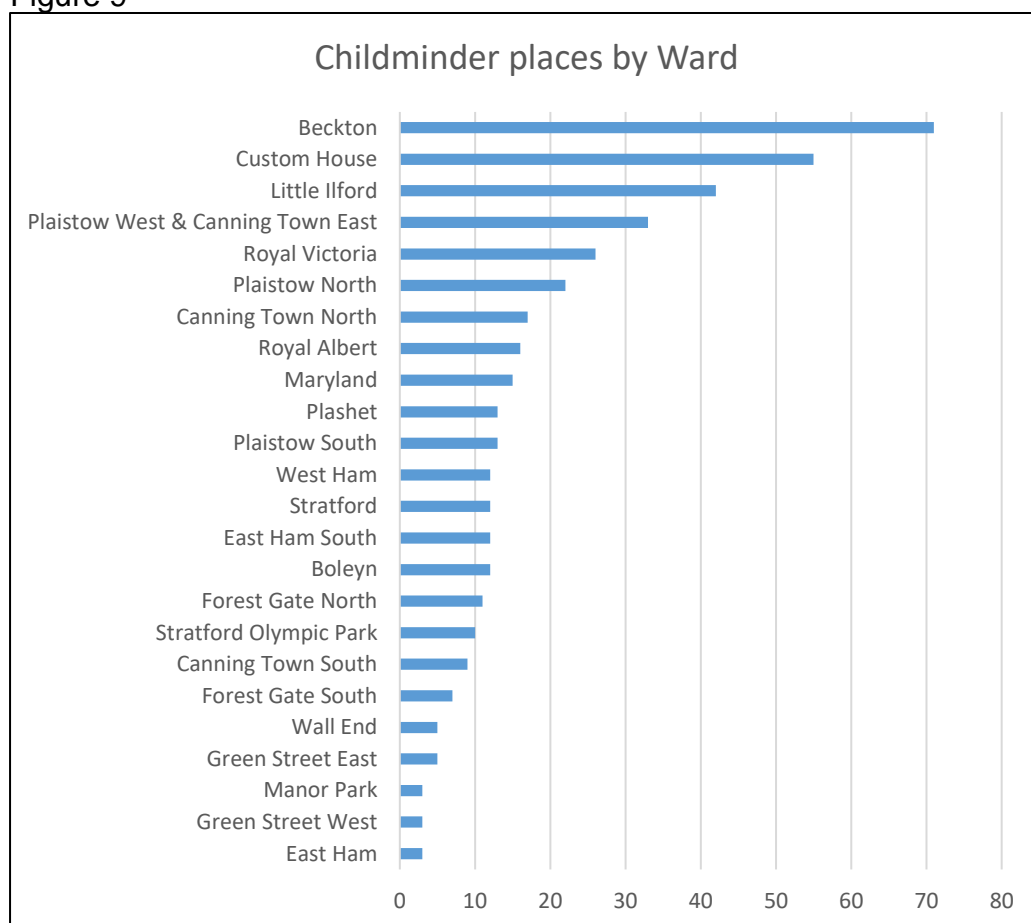


Figure 9 shows the distribution of childminder places. There are 5 or less places available in East Ham (3), Green Street West (3), Manor Park (3) and Green Street East (5). Beckton has more places than any other ward at 71, significantly more than the borough average per ward of 18.

Figure 10

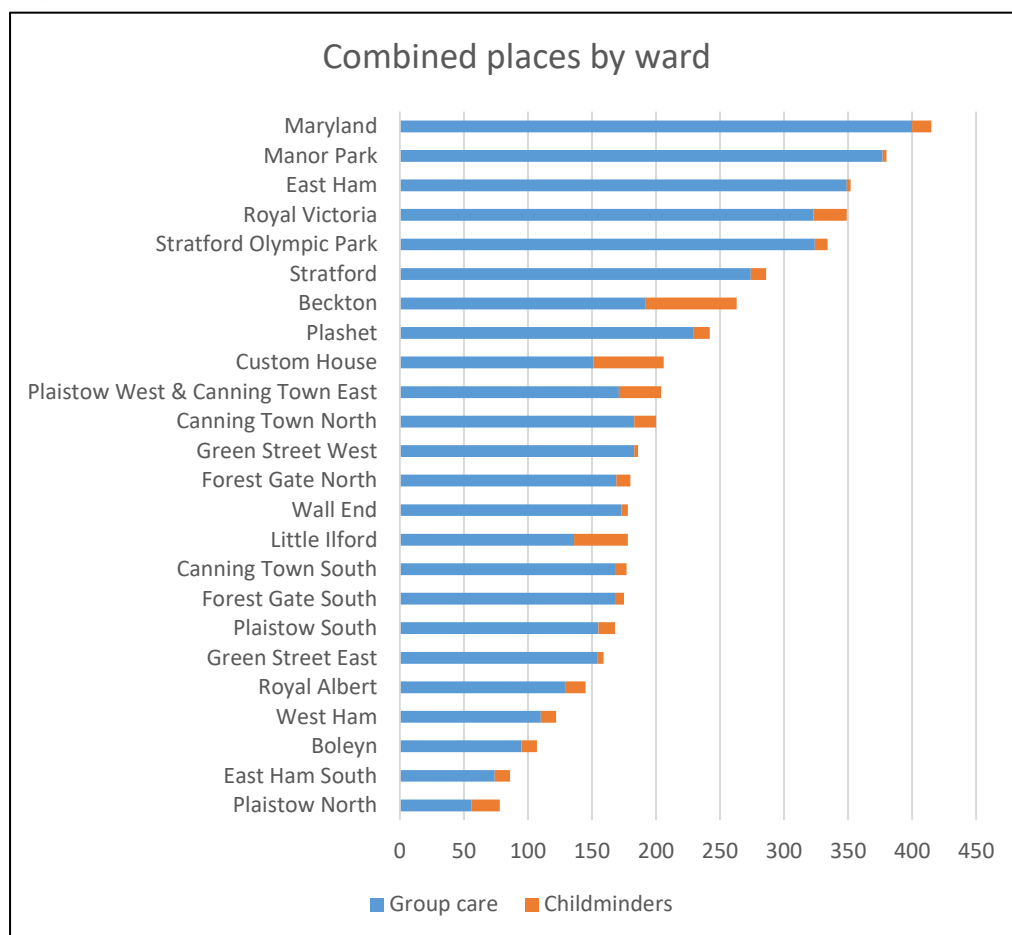


Figure 10 shows the overall distribution of under-five places across the borough. The wards with 150 or less places are Plaistow North (78), East Ham South (86), Boleyn (107), West Ham (122) and Royal Albert (145). Maryland has the highest number of places (415), compared to the ward average of 215.

### 3.4 Number of places available per child in each ward

#### 3.4a Overall place availability per child in each ward

Figure 11

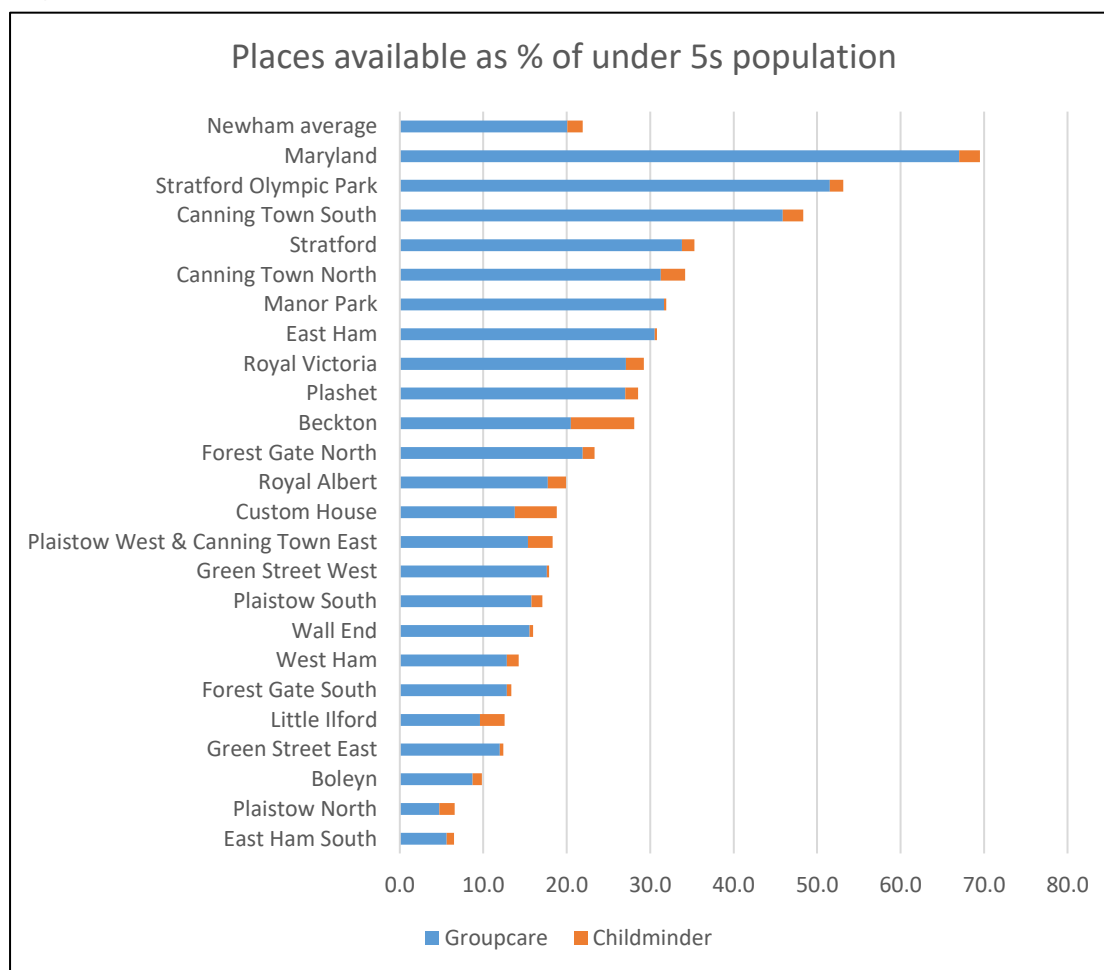


Figure 11 shows the number of all places as a percentage of the resident under-five population in each ward. The ward distribution of all places shown above translates to an average of one full time equivalent place for every 5 children in the age range across the borough, more precisely in 2023 this equates to 22% of under-five population overall. It should be noted that many children access part time places in early years so that, for example, one full time equivalent place may be occupied by as many as three children attending on a part time basis.

The variation in the number of places available per resident under-five in each ward has narrowed, with new places being created in some of the wards with least provision. There remains a significant variation, as illustrated in Table 11, where East Ham South has 1 full time place for every 16 resident child and Maryland has 1 place for every 2 children. The wards with the least places per resident child are congregated around the centre of the Borough and are East Ham South, Plaistow North, Boleyn and Green Street.

The wards with the most places per resident child are Maryland, Stratford Olympic Park, Canning Town South, Stratford and Canning Town North.



Table 11 Under 5s Full Time Places		
Rank	Wards are ranked by total registered places per resident child in each ward - rank 1 has the least places, 24 the most	
1	East Ham South	1 full time place for every 16 resident children
2	Plaistow North	1 full time place for every 16 resident children
3	Boleyn	1 full time place for every 11 resident children
4	Green Street East	1 full time place for every 9 resident children
5	Little Ilford	1 full time place for every 8 resident children
6	Forest Gate South	1 full time place for every 8 resident children
7	West Ham	1 full time place for every 8 resident children
8	Wall End	1 full time place for every 7 resident children
9	Plaistow South	1 full time place for every 6 resident children
10	Green Street West	1 full time place for every 6 resident children
11	Plaistow West & Canning Town East	1 full time place for every 6 resident children
12	Custom House	1 full time place for every 6 resident children
13	Royal Albert	1 full time place for every 6 resident children
14	Forest Gate North	1 full time place for every 5 resident children
15	Beckton	1 full time place for every 4 resident children
16	Plashet	1 full time place for every 4 resident children
17	Royal Victoria	1 full time place for every 4 resident children
18	East Ham	1 full time place for every 4 resident children
19	Manor Park	1 full time place for every 4 resident children
20	Canning Town North	1 full time place for every 3 resident children
21	Stratford	1 full time place for every 3 resident children
22	Canning Town South	1 full time place for every 3 resident children
23	Stratford Olympic Park	1 full time place for every 2 resident children
24	Maryland	1 full time place for every 2 resident children
	Newham Average	1 full time place for every 5 resident children

Some wards with lower places per child resident are next to others that have high numbers, which can then serve their population needs. For example, Forest Gate North (ranked 14 above) has boundaries with other better served wards of Maryland (ranked 24), Manor Park (ranked 19), as well as Forest Gate South (ranked 6).

On the other hand, Green Street West (ranked 10 above), has boundaries with worse served wards of Plaistow North (2), Boleyn (3), Green Street East (4), Forest Gate South (6) and West Ham (7).

A weighted analysis which reflects equally both the places per resident population in a ward and those of other wards with an adjoining boundary produces a slightly different ward ranking. However, the majority of those wards with least provision per child remain largely clustered in the centre of the borough. The biggest movers using this analysis are the improving Forest Gate North (improving from 14 to 19) and the declining Green Street West (deteriorating from a rank of 10 to 4) and Stratford (deteriorating from a rank of 21 to 16) The wards with the least places per resident using this analysis is Plaistow North, Boleyn, East Ham South and

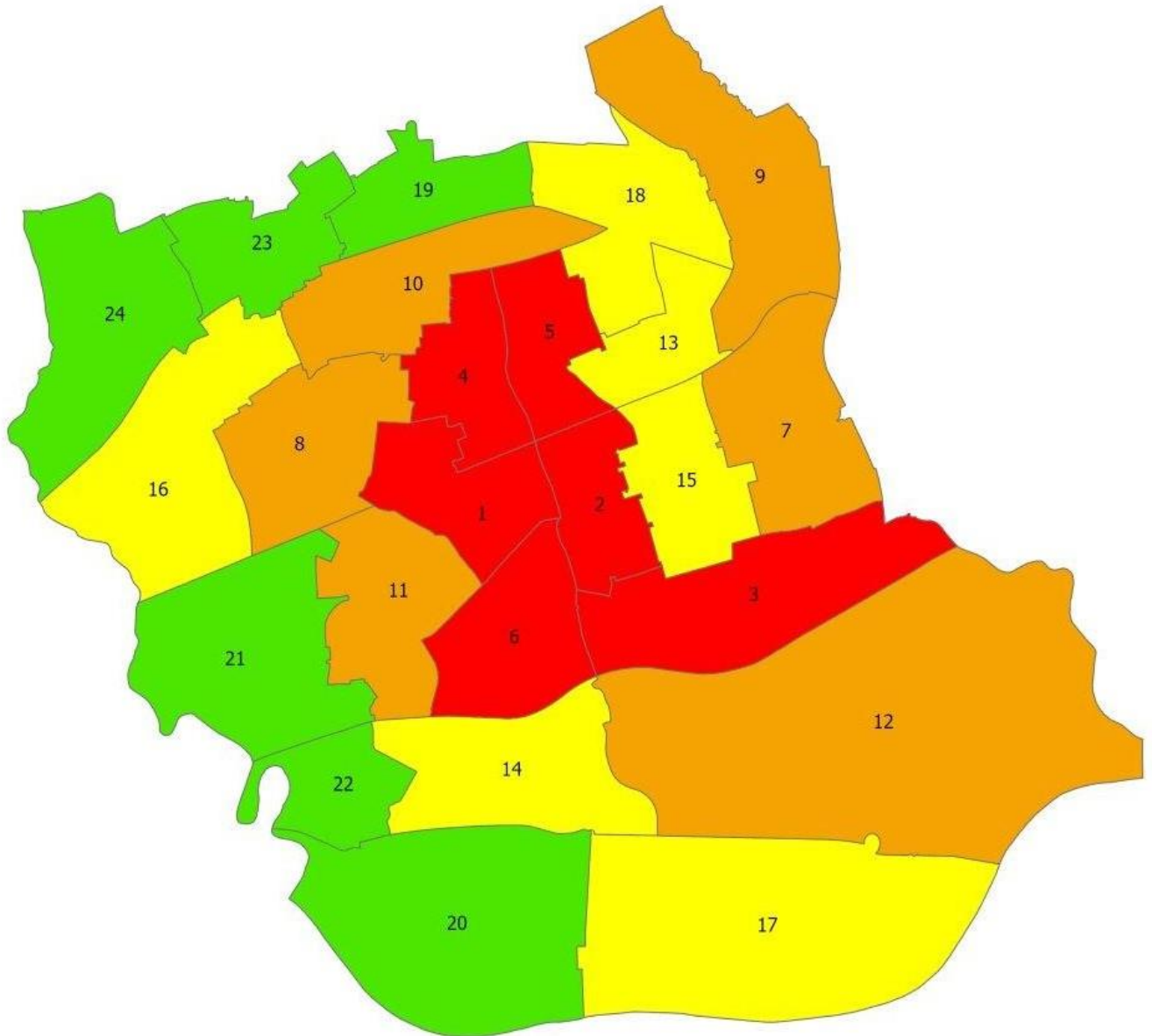
Green Street West. This revised ranking is set out in Table 12 with the geographical distribution shown in Map 2.

It should be noted that because the Stratford area is a major transport hub and employment centre, it is likely that this increases the demand for places in the wards of Stratford, Stratford Olympic Park and Maryland.

Table 12 Under 5s Adjusted Ward Rank	
Wards are ranked to reflect places per child in resident ward and in adjoining wards (1 being worst, 24 being best)	
1	Plaistow North
2	Boleyn
3	East Ham South
4	Green Street West
5	Green Street East
6	Plaistow South
7	Wall End
8	West Ham
9	Little Ilford
10	Forest Gate South
11	Plaistow West & Canning Town East
12	Beckton
13	Plashet
14	Custom House
15	East Ham
16	Stratford
17	Royal Albert
18	Manor Park
19	Forest Gate North
20	Royal Victoria
21	Canning Town North
22	Canning Town South
23	Maryland
24	Stratford Olympic Park

## Map 2 Showing Adjusted Ward Rank Childcare Places for Children Under Five

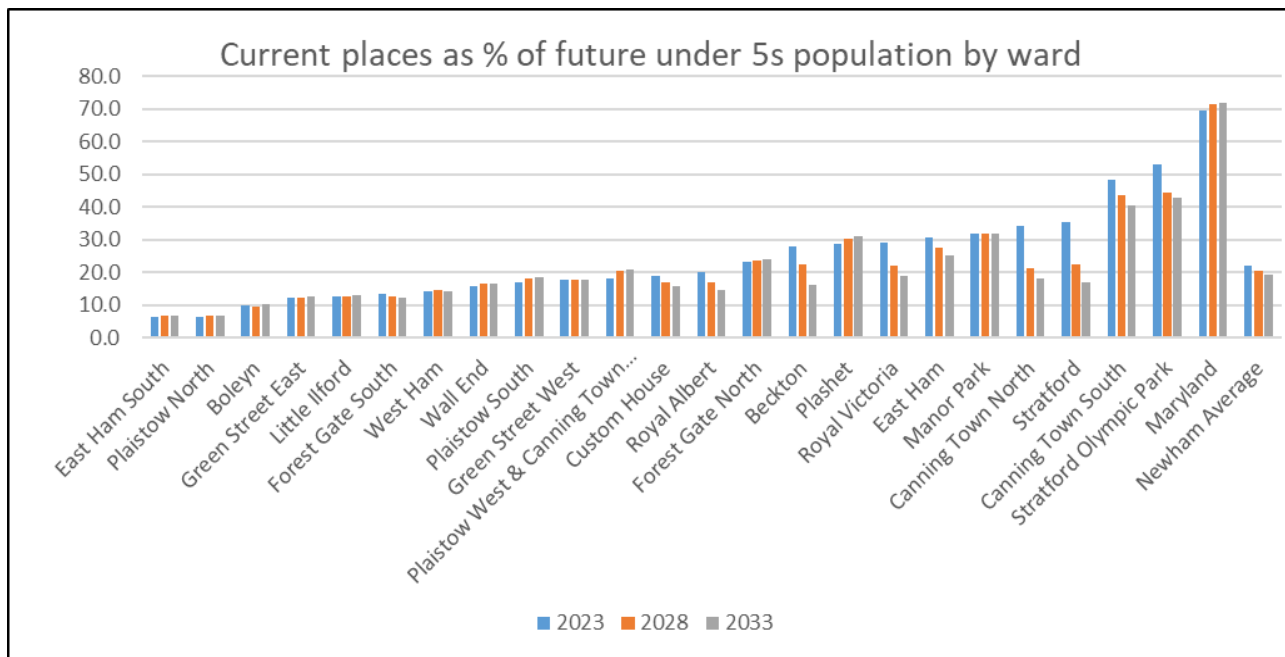
Wards are ranked to reflect places per child in resident ward and in adjoining wards (1 being worst, 24 being best)



### 3.5 Future Child Population Projections

Figure 12 shows the impact of predicted population changes on future sufficiency for under fives at ward level, assuming existing numbers of places available stays the same.

Figure 12



Overall Newham’s under-fives population is predicted to see an increase of 13.8% by 2033. Using ward level population projections the wards with the least places per resident child in 2033 will remain as East Ham South, Plaistow North, Boleyn and Green Street East. The biggest change in place availability relate to Stratford, which reduced the places available per resident child from the current 35% to 18% by 2033, Canning Town North which reduces the places available per resident child from the current 34% to 18% and Beckton which reduces from 28% to 16% by 2033. Plaistow West and Canning Town East is predicted to have falling child population and on this basis would increase the number of places available per resident child in the ward from the current 18% to 21% by 2033, assuming the number of childcare places remained the same.

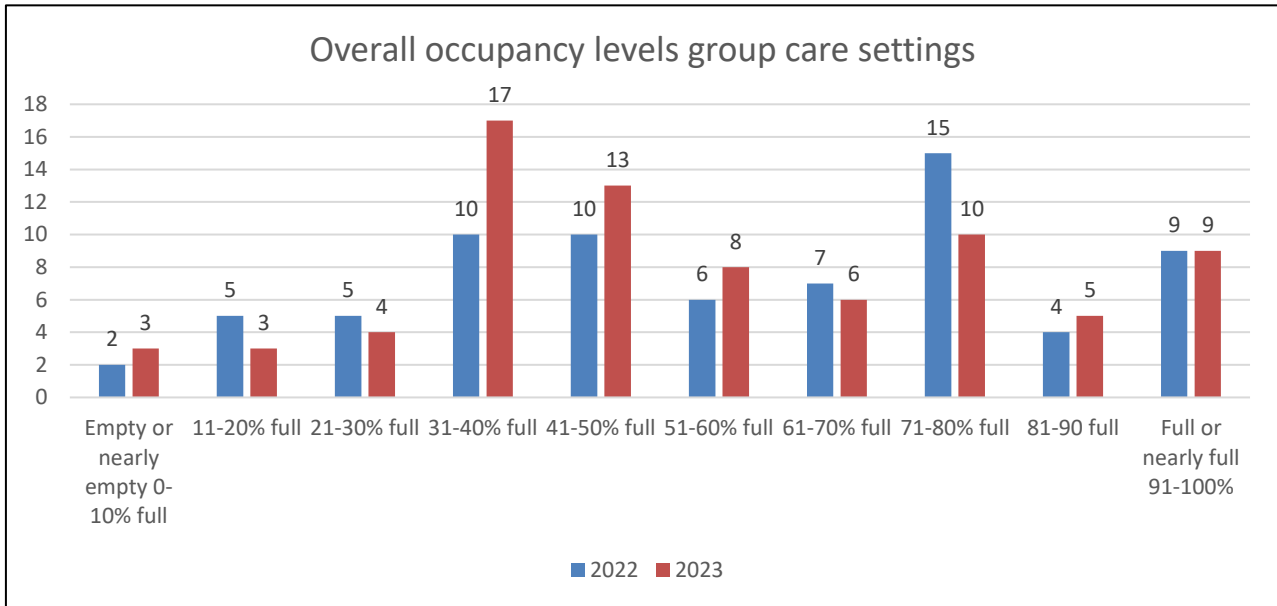
### 3.6 Childcare Setting Occupancy levels in Newham

Group care providers and childminders were asked about overall occupancy levels in autumn 2022 and autumn 2023. Occupancy is a key driver in supporting sustainability. Occupancy is a major factor driving unit costs, as occupancy increases fixed costs such as rent, rates, utilities and management time are spread across more children, thus lowering the cost per hour delivered.

#### 3.6a Group care place occupancy

There is a wide range of occupancy levels as illustrated in figure 13. Providers reported an average occupancy of 54% in a survey conducted in autumn 2023. This represents a marginal decline against the 56% average occupancy reported for autumn 2022. More settings reported occupancy in the mid-range of occupancy levels in 2023, compared to 2022 where there were more settings with very low or high attendance. Average occupancy remains significantly below the 61% recorded in the CSA 2019 (pre-Covid), as a result of lower fee-paying place take up.

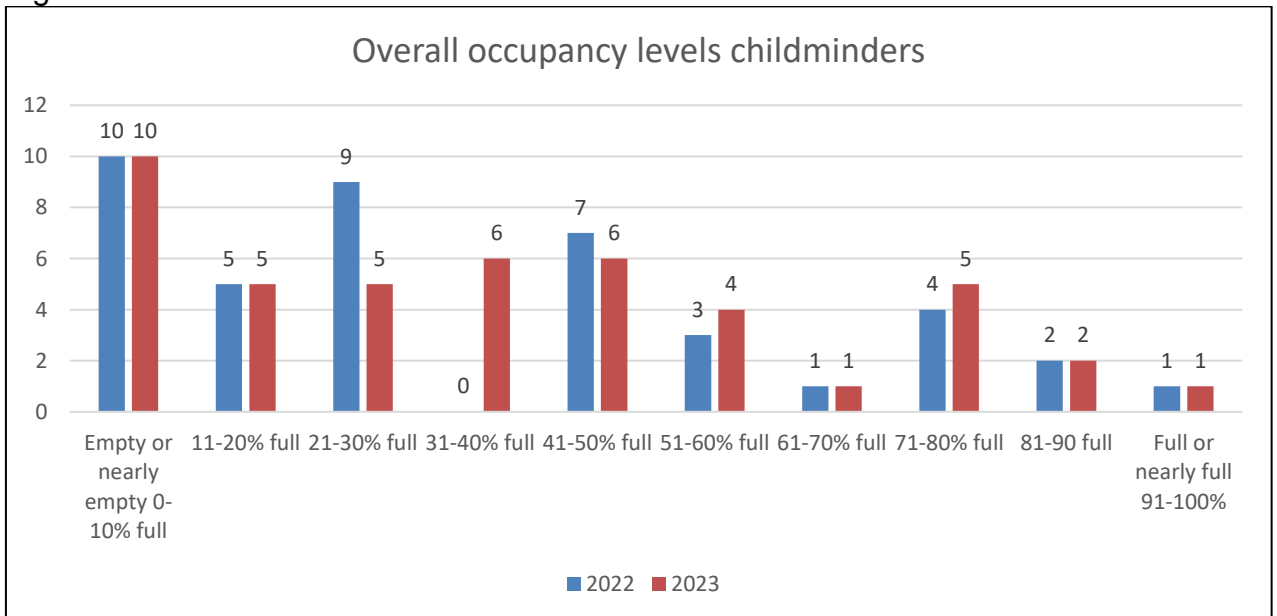
Figure 13



3.6b Childminder place occupancy

The average occupancy of childminder survey responders in autumn 2023 was 37%. This represents a small improvement from the average 35% recorded in autumn 2022. In autumn 2022 and autumn 2023, there is a significant proportion of childminders with very few children as is illustrated in Figure 14. The average occupancy rate recorded pre Covid, in the CSA 2019 was 45%.

Figure 14



### **3.7 Supply of services to children with Special Educational Needs or Disabilities**

Children's needs may be identified at birth or over time as they grow and develop. Provision for SEND children is provided by mainstream childcare settings and through a number of specialist services provided by both maintained and voluntary organisations.

In 2023/24 1,539 early notifications were received from colleagues in Early Help, Education and Health. This is an increase of 215 from the previous year.

Where children attend a PVI or CM setting, they have access to the Area SENCO team who will develop teaching strategies and guide the setting through the process to access additional funding. The targeted interventions provided by the setting are recorded on the Early Years support plan (EYSP) and the costed provision map details how funding requested will be spent. Only a few children, will need to apply for a statutory needs assessment, which may or may not lead to an Education and Health Care plan being issued and the Area SENCO team will provide this support.

In 2023/24 the number of commissioned assessment places remained at 104. Any provider receiving assessment place funding are required to identify children who require an EHCP and commence the statutory needs assessment process. The conversion rate is usually 10% of children moving from an assessment place to a statutory plan.

The SEND profile for the 104 Assessment places are as follows: 80% are on the social communication pathway awaiting diagnosis, 2% have a SLC need, and 10% have more complex SEND.

A further 15 places were funded at assessment place level through early notification outside of these arrangements.

In addition, in 2023/24 resource provision for 6 children with complex social communication needs and 2 with PMLD, were established in two of the maintained nursery schools.

### **3.8 Quality of early education and childcare in Newham**

#### **Ofsted inspection grades**

All childcare providers open and offering education and childcare for two hours or more a day must register with and be inspected by Ofsted, who give them an overall grade for the quality of their provision. The Education Inspection Framework (2023) sets out Ofsted's principles and the main judgements that inspectors are required to make.

Inspection provides assurance to the public and to Government that minimum standards of education, skills and childcare are being met; that – where relevant – public money is being spent well; and that arrangements for safeguarding are effective.

The Education Inspection Framework

<http://www.gov.uk/government/publications/education-inspection-framework> sets out the principles and criteria for the inspection under these 4 headings

- quality of education
- behaviour and attitudes
- personal development
- leadership and management

There are four possible Ofsted grades: 'outstanding', 'good', 'requires improvement', and 'inadequate'. Ofsted have now moved to a six-year cycle, for all early year's providers, prioritising settings graded less than good.

Ofsted is the sole arbiter of quality; however, Newham is committed to ensuring the highest possible quality of early education and childcare. There is evidence that high quality provision has a significant and sustained positive affect on outcomes for children. To this end, and in accordance with our statutory responsibilities, a Quality Improvement strategy is in place to support new settings, and those inspected as 'Requires Improvement', or 'Inadequate', in order for them to achieve a Good or Outstanding Ofsted outcome. We also continue to provide universal support to all settings to ensure we continue to raise our Ofsted profile, and to ensure sustained high quality of provision.

The Local Authority Quality Improvement team has been responsive to the additional challenges brought about by the Covid 19 pandemic and the subsequent cost of living crisis, and strategies implemented to mitigate against risks identified in the previous CSA report have proved to be successful.

Providers have also been invited to engage in the various Government Covid Recovery schemes.

New providers may still be awaiting their first full inspection. These providers are excluded from our Ofsted ratings but receive full support from our Quality Improvement team as part of our statutory responsibility in order to ensure they meet Ofsted requirements.

Table 13 shows a summary of early years Ofsted inspections grades in Newham as at March 2023. During the period of the Covid 19 pandemic, there was a higher level of change with multiple settings closing, opening or changing in ownership. It should be noted that this was for reasons other than the pandemic. This increased churn has continued, meaning that a high level of settings have yet to receive their first inspection, as shown in Table 13. This higher level of inexperienced providers, likely to need support, is a potential risk to future quality, which the Local Authority has identified and is successfully, taking steps to mitigate.

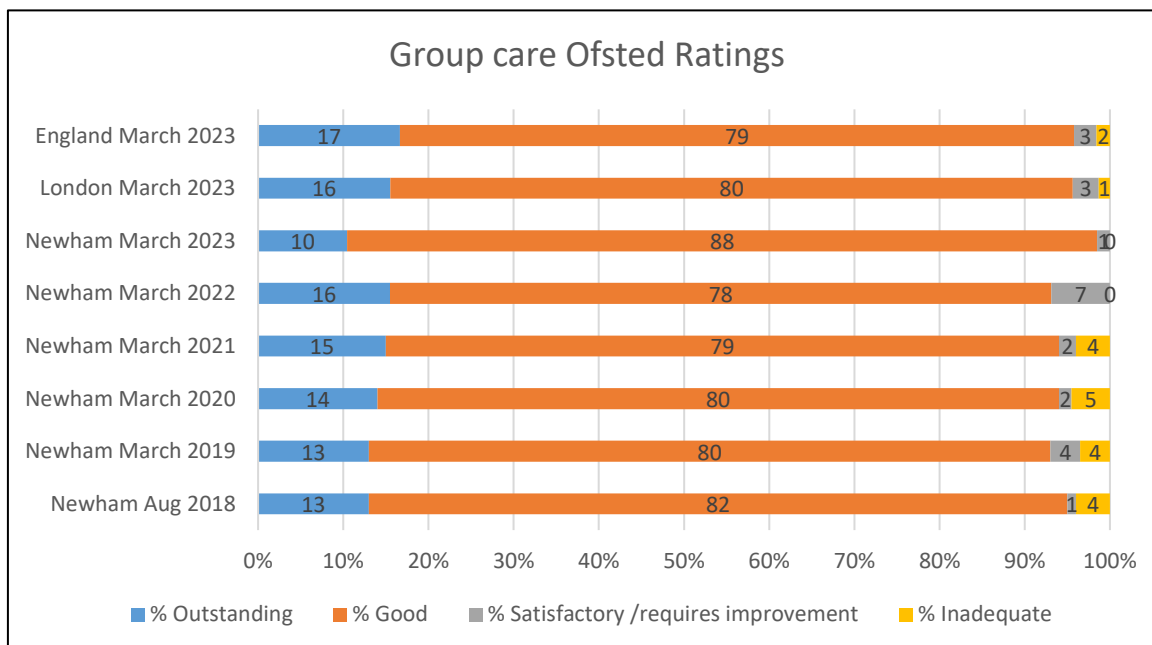
Table 13

Summary of early years Ofsted inspections grades in Newham as at March 2023

Type of Provision	Number of inspected Providers	% Achieving good or outstanding March 2023	CSA 2022 comparison	Awaiting first inspection
Childminders	82	93.9	97.8	30
Childcare on domestic premises	2	100	100	0
Private Voluntary & Independent group care	67	95.1	93.1	38
Maintained Nursery Schools	7	100.0	100	0
Schools and Academies	66	98.5	93.9	2

There has been an improvement in the overall proportion of PVI group care settings and Schools achieving a good or outstanding Ofsted grade, compared to 2022. There has been a decline in the proportion of childminders achieving a good or outstanding Ofsted grade. There remains increased flux in the childcare market since the pandemic, with more settings opening and closing than has historically been the case in Newham. This is reflected in the high number of PVI group care settings and childminders waiting on their first inspection.

Figure 14



### 3.8a Group Care Ofsted Ratings.

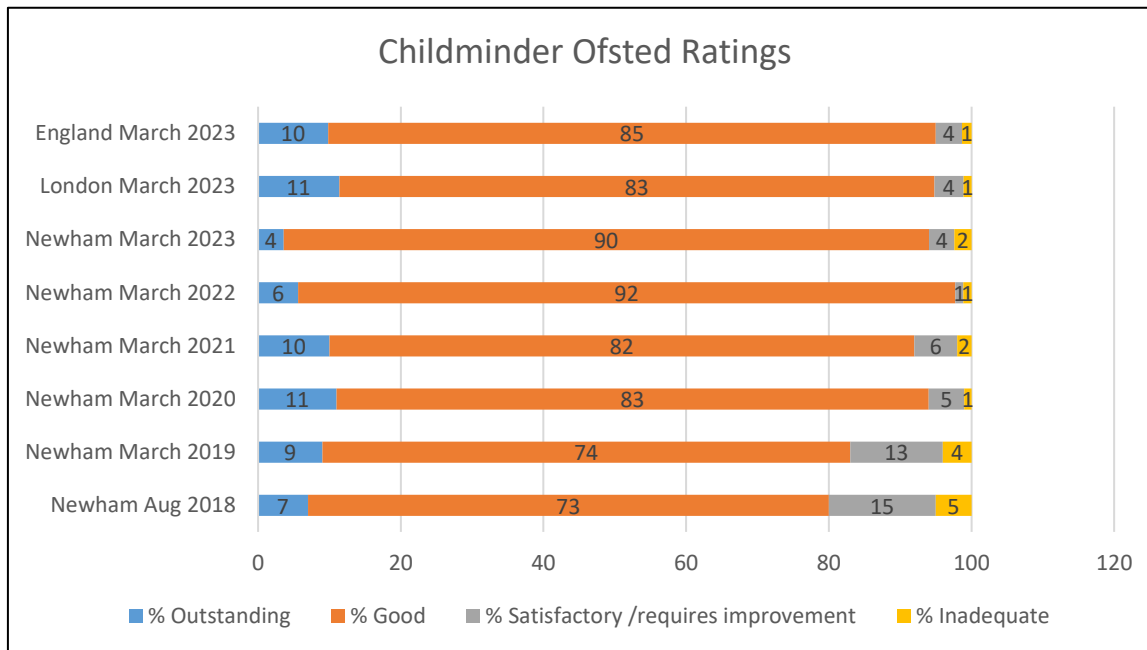
Figure 14 shows the percentage of group care providers in each of the Ofsted inspection category ratings. When compared to the findings of the CSA 2022, the



proportion of Newham’s group care settings achieving good or outstanding Ofsted grades has improved to 98% from 94%, however the proportion of group care settings achieving outstanding declined to 10% from 16%.

When compared to London and England in 2023, Newham has a smaller proportion of group care settings that are either requires improvement or inadequate, but also a smaller proportion of group care settings achieving outstanding.

Figure 15



### 3.8b Childminder Ofsted Ratings

Figure 15 shows the percentage of childminders in each of the Ofsted Inspection category ratings for Newham, London and England in 2023, together with some previous year’s data also for Newham. There has been a 4% decline in the proportion of childminders achieving a good or outstanding Ofsted grade in 2023, compared to that achieved in 2022 in Newham. This reverses a trend over recent years where Newham’s childminder ratings have steadily improved. The proportion of childminders receiving requires improvement or inadequate are similar for Newham, London and England, but the proportion of childminders achieving outstanding is higher than Newham in both London and England.

### 3.9 Cost of early years childcare

For early year’s childcare outside the funded entitlements, we report on average prices per hour, reported to us by settings. There may be variations to prices based on the number of hours a family uses, with reductions for longer hours, or discounts for sibling groups. There may be additional payments for additional services, e.g. lunch and other meals, which are not included in these prices.

### 3.9a Charges Day Nursery settings.

Table 14 Average Day Nursery Full Fee paying Full Time 50 hours per week							
Age range	Newham weekly average 2021	Newham weekly average 2022	Newham weekly average 2023	Newham per hour 2023	England weekly average 2023	Inner London weekly average 2023	Outer London Weekly average 2023
0-2	£290	£308	£328	£6.56	£290	£395	£360
2-3 no funded hours	£275	£286	£315	£6.30	£284	£373	£346
3-5 no funded hours	£247	£253	£300	£6.00			
2-3 fee after deducting 15 funded hours	£203	£205	£228	£6.51			
3-4 fee after deducting 15 funded hours	£199	£204	£229	£6.54			
3-4 fee after deducting 30 funded hours	£137	£153	£170	£8.50	£118	£160	£130

Table 14 reflects the fact that full time fees in Newham have increased by 11.4% across the 0-5 age range since 2022, based on 62 survey returns from day-care nurseries, higher than the 4.3% increase reported last year. The 11.4% increase is above the official inflation rate over the same period. Prices in Newham remain largely below the averages for London but are above the average for England. The Coram Family and Childcare Trust national childcare survey 2023 also found that prices for charged hours increased. Price increases since 2022 for a part time (25 hours) place in a nursery for children in Great Britain, was 5.6 per cent for those aged under two, 6.1 per cent for two year olds and 3.8 per cent for three to four year olds using the free entitlement.

Some providers in Newham and across the country charge for lunch and activities. Providers cite funding gaps as a reason for introducing charging policies on food and activities. Most providers also offer part time places and commonly charge a higher hourly rate.

Many providers will have incurred additional costs because of high general inflation, staff recruitment pressures, changes to the minimum wage and energy costs and this is reflecting in the higher fees being charged. Overall occupancy levels reported remain below pre pandemic levels and providers will need to continue adapting their business models to ensure they cover their costs and remain sustainable. The introduction of the expanded funded childcare is likely to increase the overall demand for childcare and may be an opportunity to generate additional income to support sustainability for participating settings.

### 3.9b Charges for childminder settings

Table 15 Average Childminder Full Time 50 hours per week							
Age range	Newham Weekly Average 2021	Newham weekly average 2022	Newham weekly average 2023	Newham per hour (full time) 2023	England weekly average 2023	Inner London weekly average 2023	Outer London Weekly average 2023
0-2	£277	£297	£327	£6.54	£248	£355	£322
2-3 no funded hours	£276	£284	£312	£6.24	£248	£352	£326
3-5 no funded hours	£256	£300	£327	£6.54			
2-3 fee after deducting 15 funded hours	£212	£220	£217	£6.20			
3-4 fee after deducting 15 funded hours	£212	£217	£217	£6.20			
3-4 fee after deducting 30 funded hours	£142	£131	£161	£8.05	£118	£160	£130

Table 15 shows that full time childminder prices in Newham have increased overall by an average of 7.7% since 2022, based on the 58 survey returns. Childminder average charges are closely aligned to average nursery fees in Newham, though there is significant variation between childminders in terms of pricing.

Newham childminder prices are above the national average but below the averages for both inner and outer London. Most childminders also offer part time places and commonly charge a higher hourly rate for this service.

### 3.10 Hours of Operation

#### 3.10a Day nurseries

The most common number of hours offered by day nurseries is ten hours per day. The most common start and end times are 8am and 6pm. Longer hours are available in some settings. The earliest start time is 6.30 am and 23 settings start earlier than 8am. The latest end time is 7pm and 16 providers have a later end time than 6pm. All operate Monday to Friday.

#### 3.10b Childminders

Overall, childminders have a greater capacity to accommodate out of hours or changeable childcare needs. The most common start times are 7am and 8am. Nearly half (48%) of childminders have a start time of before 8am. The earliest start time is 6am. The most common end time is 6pm, but around a quarter (26%) offer later end times and the latest end time is 10 pm. Eleven childminders recorded that they offer a weekend service.

### 3.11 Funded Early Education and Childcare Sufficiency

Some children are entitled to childcare, funded by the government. This is being expanded over the period April 2024 to September 2025.

- All children aged three and four are entitled to 15 hours per (if accessed in term time only) until they start reception class in school (570 hours over a year)
- Children aged three and four where both parents are working, or from lone parent families where that parent is working, are entitled to 30 hours per week (if accessed in term time only) until they start reception class in school (1140 hours over a year)
- Children aged two whose families receive certain benefits (including low income families in receipt of in-work benefits), or those who meet additional non-economic criteria, are entitled to 15 hours per week (570 hours over a year).
- From April 2024 funded hours are being made available to eligible working families for children under three. This is an expansion of the scheme already in place for working families with three and four year olds and is being implemented in stages:
  - From April 2024, working parents of two year olds will be able to access 15 hours (570 hours over a year) of early education and childcare
  - From September 2024, 15 hours (570 hours over a year) will be extended to working parents of children from 9 month and above.
  - From September 2025, working parents of children from 9 months and above will be entitled to 30 hours (1140 hours over a year) of early education and childcare.

Parents do not have to use all the hours of their funded entitlement. They may choose to split them between providers. With the agreement of their provider, parents may also spread them across the year – for example, rather than taking 15 hours for 38 weeks a year they could take just under 12 hours for 48 weeks a year.

#### **Take up of funded early education overview**

The proportion of eligible children taking up funded two and universal three and four year old early education in Newham according to DfE January census is shown in Table 16, together with comparisons against previous years, London, and England for 2023.

Take up of the funded entitlements dropped across the board in Newham, London and England in January 2021, but had recovered in Newham and across the country by January 2022, with further improvements by January 2023.

There are now more options to parents in Newham looking to access funded hours to meet their needs across the year. There are now also 76 providers offering a “stretched” free entitlement, so that parents can access their annual entitlement of funded hours across the year, this is an increase from the 71 that were reported last year.

Table 16

% of eligible children taking a funded place (DfE January Census)	Newham Jan 17	Newham Jan 18	Newham Jan 19	Newham Jan 20	Newham Jan 21	Newham Jan 22	Newham Jan 23	London Jan 23	England Jan 23
Age 2	43%	50%	52%	53%	46%	60%	64%	65%	74%
Age 3 and 4 (universal 15 hours)	82%	82%	82%	83%	79%	86%	88%	84%	94%
Age 3 and 4 Number of children receiving extended "30 hours		900	1129	1267	1206	1420	1458		

3.11a Funded Early Education for two year olds scheme low incomes/disadvantage

This section looks at sufficiency for the existing two year olds scheme for low income/disadvantaged families. Sufficiency for the expanded under threes scheme for working families that is being introduced from April 2024 is considered at 3.12<sup>13d</sup>.

Figure 16

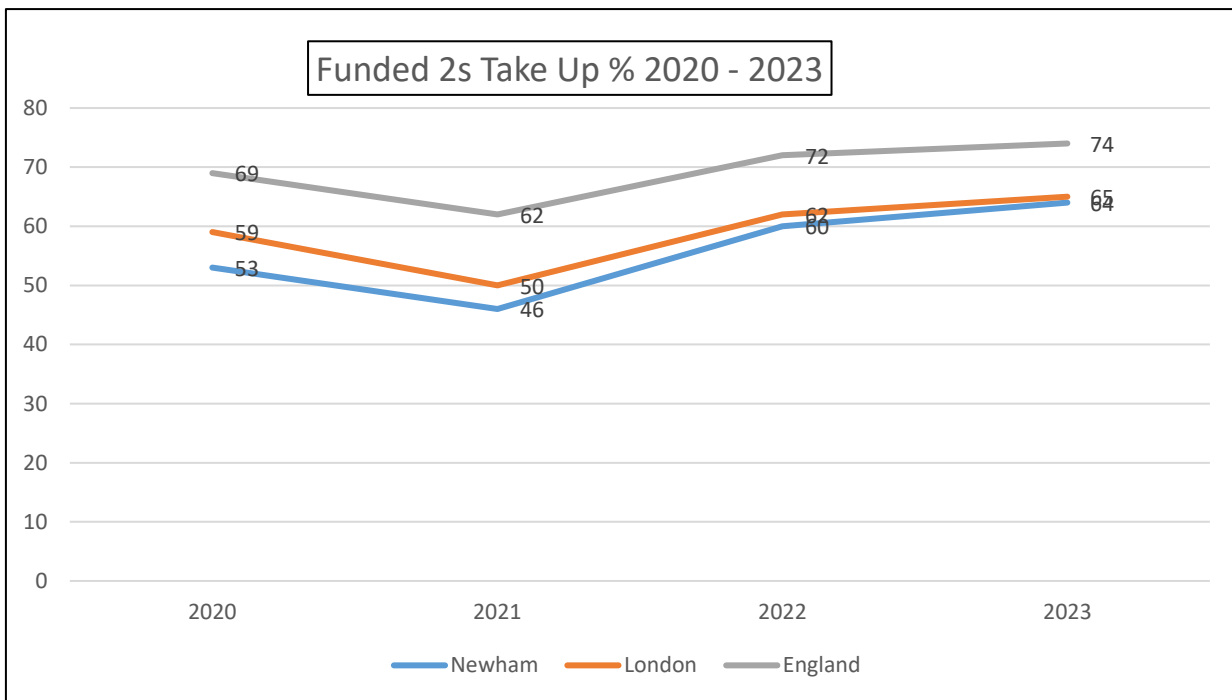


Figure 16 shows that take up rate for eligible families with two year olds in Newham has recovered significantly since the pandemic. By January 2023 take up rates are marginally below the London average, but the gap to London and England take up rates continues to narrow.

Newham still has over 1,600 children eligible for a funded two-year-old place, one of the highest reach targets of any London Authority. However, the number of families eligible to benefit from funded 2-year-old places is in decline, as the Government set benefits income threshold for the scheme has not been uplifted for a number of years. This means that despite improvements in

the proportion of eligible children that are accessing places, the actual number of children able to benefit has fallen by 7% in Newham since 2022 and by 8% in England.

Figure 17

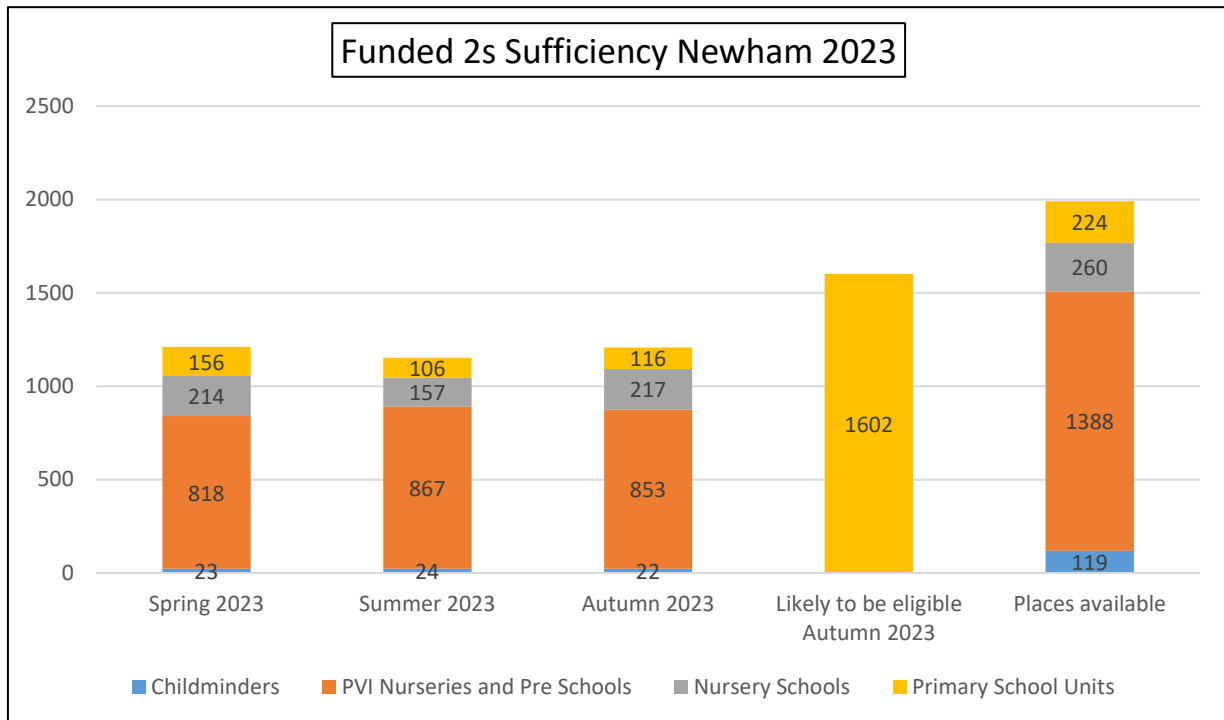


Figure 17 summarises the take up of funded places for 2s in Newham over 2023. The number of children taking up two year-old funded early education places has remained stable over 2023, at around 1,200 each term. With the number of families eligible for the scheme in decline, the percentage of eligible families taking up their places has increased to 75% by autumn 2023. The number of places available to the scheme in autumn 2023 is 1,991, more than the 1,602 families eligible in autumn 2023. PVI nurseries and pre-schools offer the largest number of places to the scheme at 1,388. Nursery school places are popular with parents and operate closer to capacity than other provider types. There is unused capacity in PVI nurseries and pre-schools, schools and childminders.

Total unused places available to the scheme in autumn 2023 was 784, up from 759 reported in the CSA 2022 and overall, there are currently more than sufficient places to meet demand. The introduction of two year old places for working parents from April 2024 will be able to draw on the unused capacity identified here, but the Local Authority will want to manage and support providers to offer places to meet demand across both schemes in 2024 and beyond.

Although there are sufficient places overall, there are particular wards with low capacity and low numbers of unused places as is shown in figure 18.

Figure 18

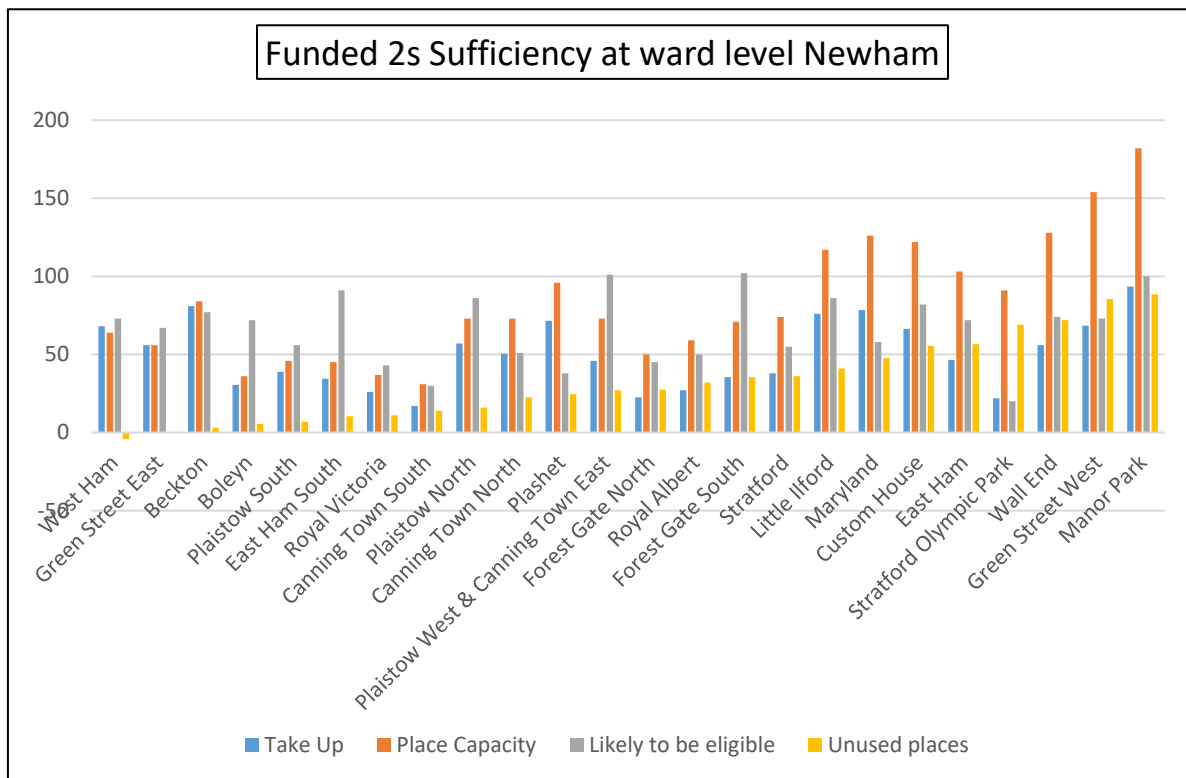


Figure 18 illustrates the pattern of take up, capacity and eligibility at a ward level in Newham. Those wards with the smallest number of unused places are West Ham and Green Street East (no unused places), Beckton (3), Boleyn (6) and Plaistow South (7). In practice, some providers have been able to provide more places than they had indicated where demand has been high. This can be achieved by bringing in capacity earmarked for other age ranges.

Those wards with the most unused places are Manor Park (88), Green Street West (85), Wall End (72) and Stratford Olympic Park (69).

The total number of providers offering places in autumn 2023 was 147 (the same as in 2022). This includes 86 PVI nursery and pre-schools, 12 Schools, 7 Nursery Schools, and 42 childminders.

3.11b Funded Early Education for three and four year olds.

Figure 19

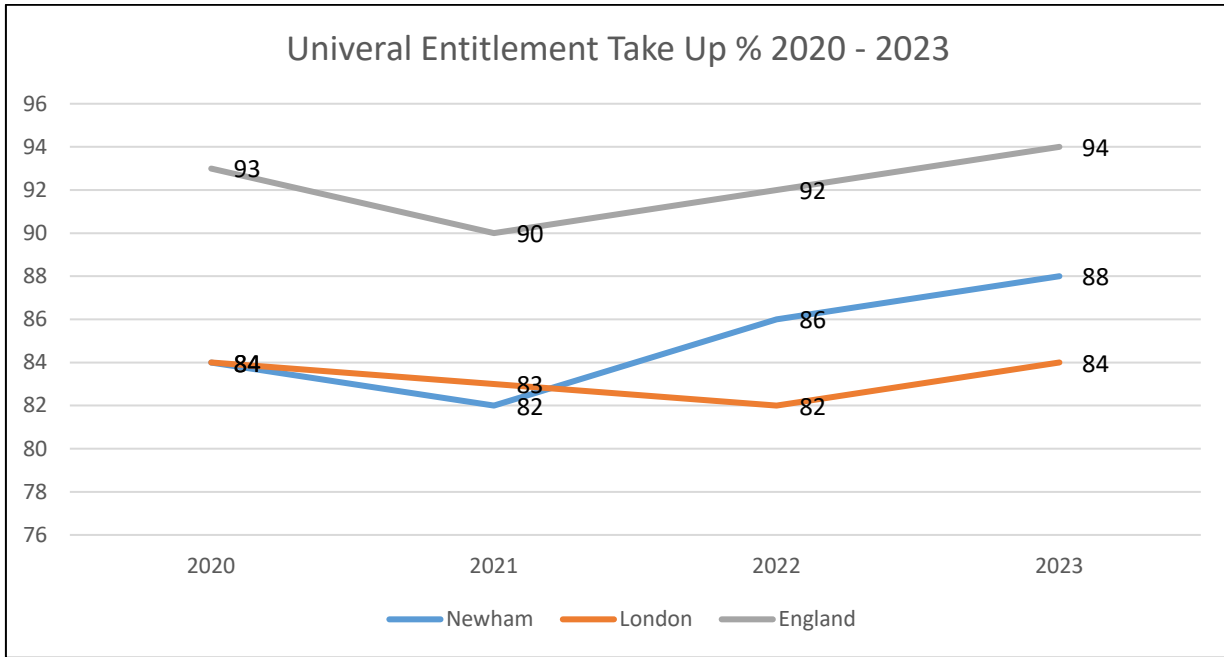


Figure 19 shows that Newham’s take up of the universal three and four year old funded entitlement over the period 2020 to 2023 and provides a comparison with take up rates across London and England.

In 2021, there was a decline in take up during the pandemic across the country. Take up has now recovered well in Newham (86%) and has now overtaken the London average and has narrowed the gap to the England average in 2023.

Figure 20

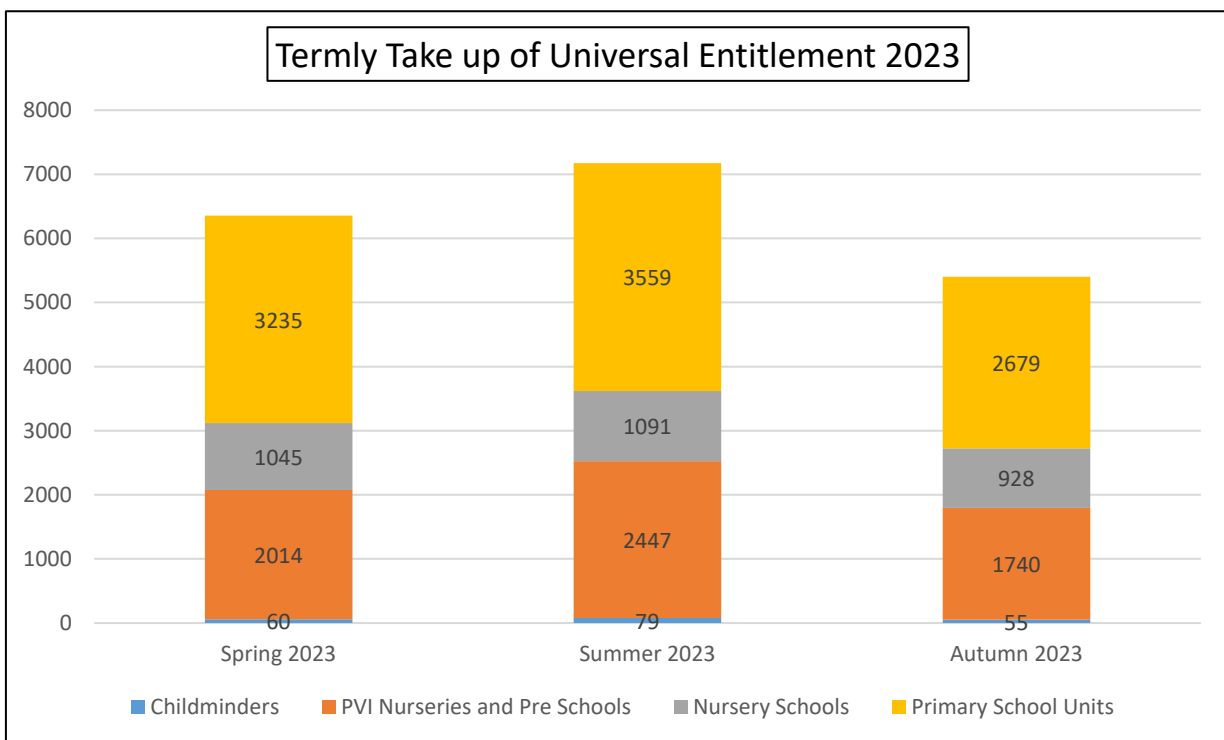




Figure 20 shows that the delivery of the universal offer is shared across all types of provider. Schools are the biggest provider type delivering the offer in Newham at 50% of all places across the three terms of 2023. PVI group care deliver 33 %, nursery schools 16% and childminders 1%.

Child attendance fluctuates during the year, reflecting the single entry point to school reception each September. In a normal year, the summer term has the highest occupancy and the autumn the lowest.

### 3.11c 30 Hour offer for Working Parents

This scheme giving working parents an entitlement to extended 30 hours of free early education and childcare for their three and four year olds was introduced in September 2017. This means a total of 1,140 hours of funded childcare per year for eligible families; 570 through the universal early education entitlement for all three and four year-olds, and 570 additional hours available to eligible working parents.

Eligibility. The conditions for eligibility include:

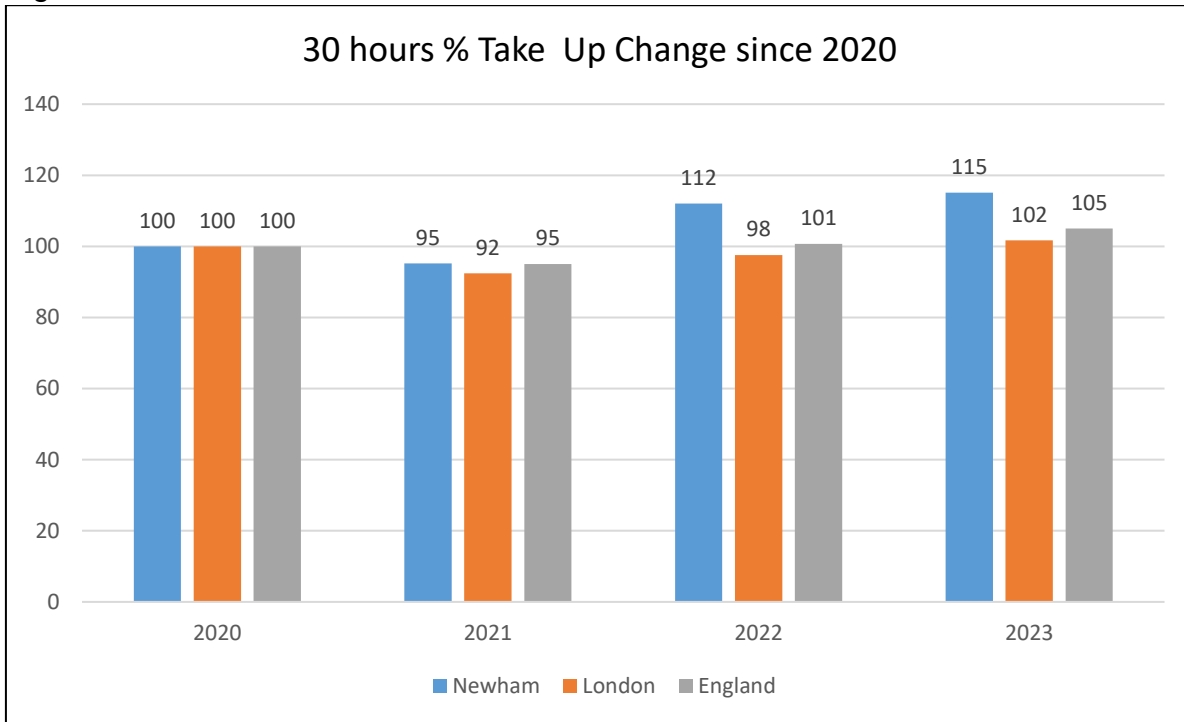
- working parents with children aged three and four;
- parents working part-time or full-time – each parent must earn at least the equivalent of 16 hours per week at the national minimum wage and below £ 100,000 per annum;
- parents who are employed or who are self-employed; and
- lone parents who are working the equivalent of 16 hours per week at the national minimum wage and below £ 100,000.

#### **Assessing demand for 30 hours places**

It is more difficult to assess demand for 30-hours places than for either 2-year-old funded entitlement or the universal funded entitlement for 3 and 4 year olds. This is because eligibility is dependent on individual employment circumstances, income and the personal situation of parents. 30-hours childcare has now been in place for six years and data on take up over this period provides a baseline for forecasting possible demand in 2024.

Figure 21 shows that Newham's take up of the funded thirty hours scheme for working parents has grown by 15% since 2020. In London and England the total number of participants now exceed pre pandemic levels but have grown more slowly than in Newham according DfE census data.

Figure 21



A seasonal pattern to place take up, linked to entry to School reception each September, means that attendance is highest in the summer term and lowest in the autumn term. In summer 2023 Newham had its highest ever number of families on the scheme at 1,830. Figure 21 shows take up and capacity by provider type for the summer 2023 in Newham. At this point Nursery Schools were close to capacity. However, there is unused capacity in all other types of provision. Overall, there were 759 unused places in the summer term, with places available in most types of setting

Figure 21

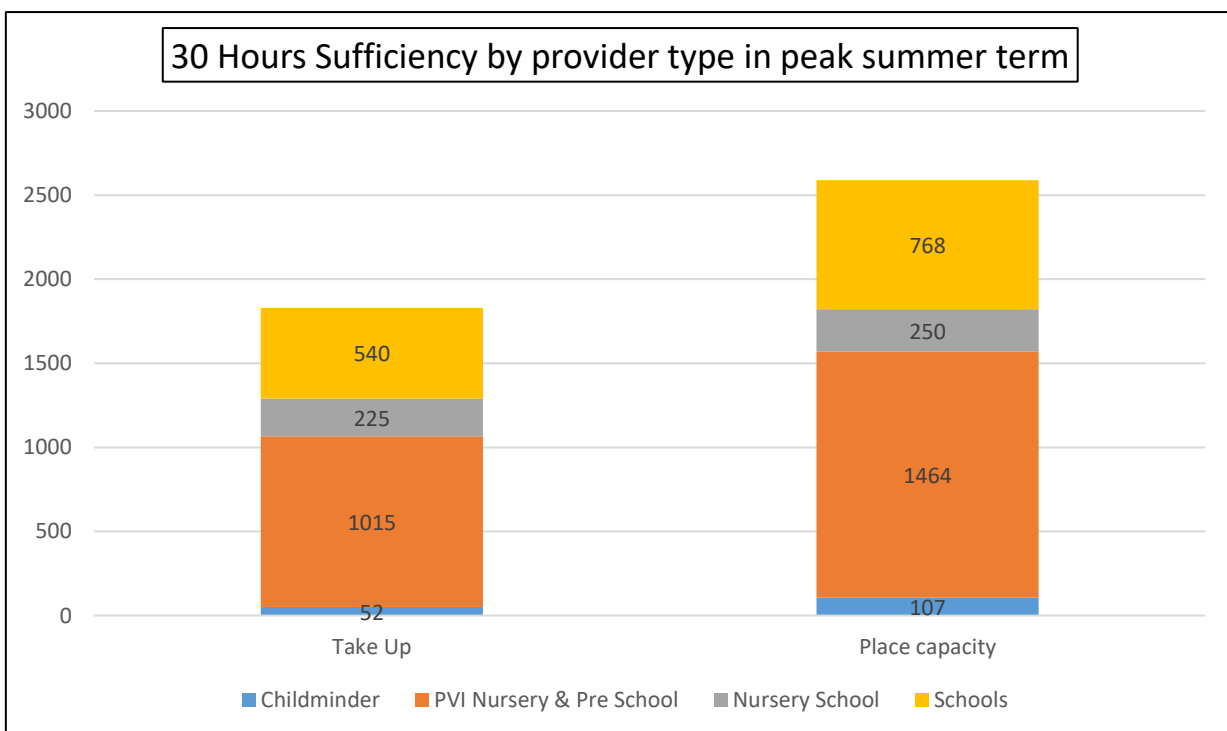
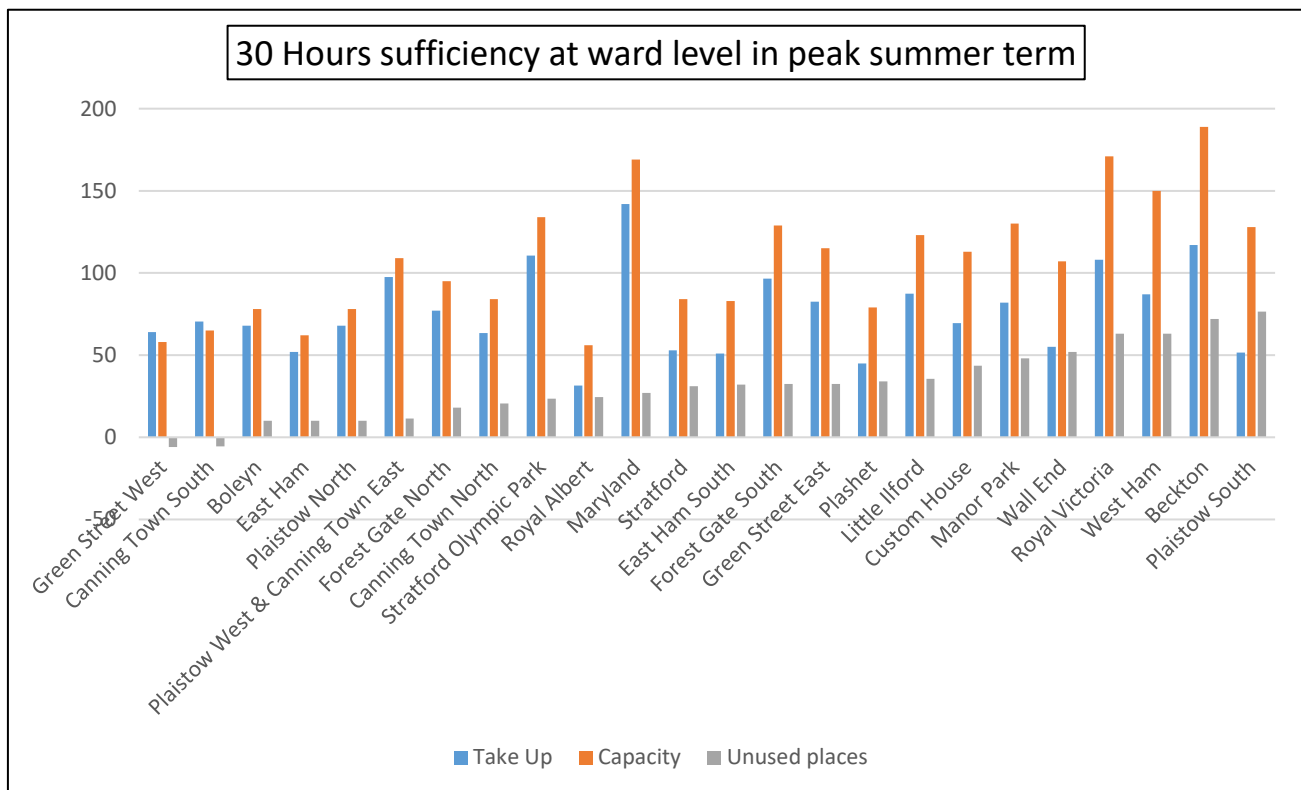


Figure 22 provides an analysis of sufficiency at ward level in summer 23. Ward level data indicates that some wards may come under supply pressure in future peak summer terms, indeed two wards show as having more 30- hours children in attendance than the capacity that was reported to the Local Authority in summer 23. Some settings will have the flexibility to change child numbers in different age ranges at times of high pressure. The wards most under pressure in the peak summer term are Green Street West (above reported capacity by 6), Canning Town South (above reported capacity by 5), Boleyn (10 unused), East Ham (10 unused), Plaistow North (10 unused).

The wards with the highest take up of over one hundred places were Maryland, Stratford Olympic Park Beckton and Royal Victoria. Take up was lowest in Royal Albert, Plashet, East Ham South and Plaistow South all of whom had under 60 places taken.

Figure 22



### 3.11d Expanded Funded Entitlement for children under three

As noted at 2.2, funded places for working families with children under three are being made available in a phased expansion of the “30 hours” scheme over the period April 2024 to September 2025.

- From April 2024 eligible working families with children aged two can get 15 hours per week (570 hours over a year)
- From September 2024 eligible working families with children from 9 months can get 15 hours (570 hours over a year)

- From September 2025 eligible working families with children from 9 months upwards can get 30 hours (1140 hours over a year)

This expansion is designed to help working families and the criteria to be eligible matches that already in place for the existing 30 hours scheme for working families with children aged three or four. Our analysis of sufficiency reflects existing take up patterns for the established 30 hours scheme, child population for under threes in each ward, employment data and the places currently offered to the expanded scheme by Newham providers. As this is a new scheme that has not started there is a high level of uncertainty about both demand and supply and the estimates currently shown will need to be regularly reviewed, updated and shared with key stakeholders.

Figure 23 shows an indicative estimate of the demand and supply of places in April 2024. Our current estimate is that there is likely to be demand for around 1,300 places and providers have indicated that they can offer 1,624, so sufficient places overall. However there are wards where supply is lower than projected demand and these are shown to the left and include Forest Gate South, West Ham, Boleyn, Green Street East and Royal Albert. Wards where there is more supply than projected demand from families living in the ward are shown to the right and include Manor Park, Maryland, Wall End, Plashet and East Ham. In some cases wards with a surplus of places can be a resource for families living in neighbouring wards that are less well served.

Figure 23

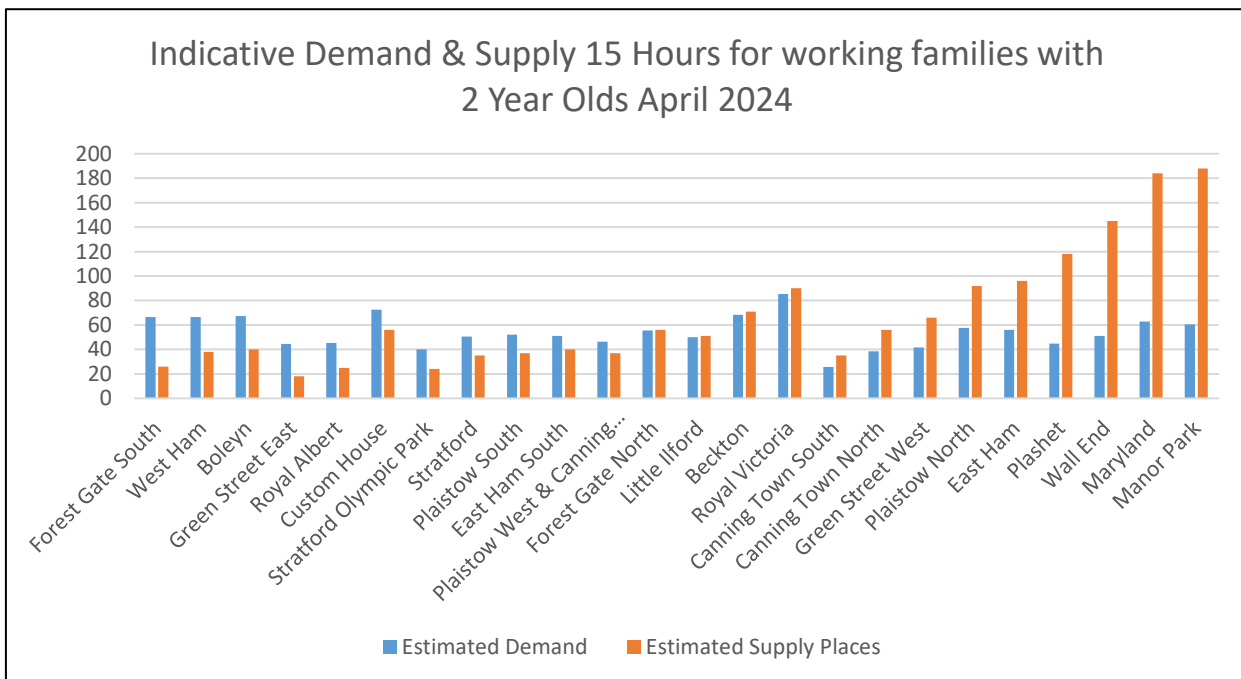
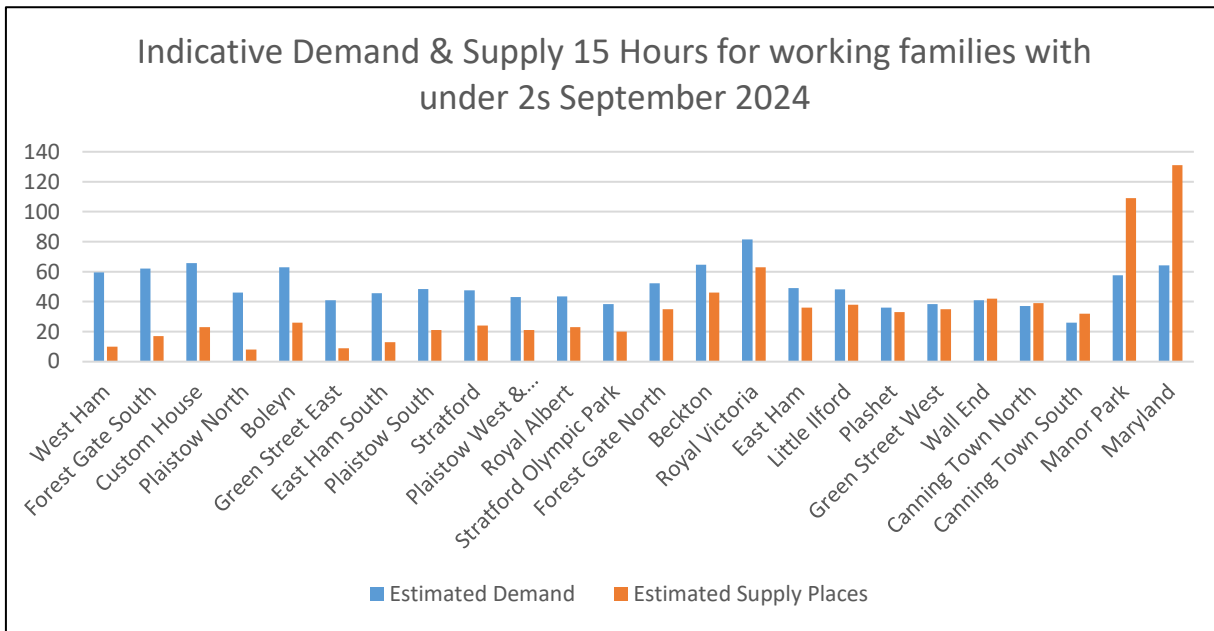


Figure 24 shows an indicative estimate of the demand and supply of places for under 2s, starting in September 2024. Our current estimate is that there is likely to be demand for around 1,200 places and providers have so far identified that they can offer 854 places, so indicatively there are currently insufficient places to meet projected demand, with an overall shortfall of 346 places.

The wards where the supply is significantly below expected demand are shown to the left and include West Ham, Forest Gate South, Custom House, Plaistow North and Boleyn. Current estimates show that supply is lower than projected demand in nineteen of the 24 wards.

Figure 24



Looking further ahead, in September 2025 the 15 hours available to working families with children under three will double to 30 hours. At this point significant growth in funded places is likely to be needed across the age range of the expanded offer. Further work will be undertaken to map projected supply and demand for the third implementation phase in September 2025 during 2024, once the first and second phases of the scheme have launched.

### 3.12 Business challenges

Newham providers were asked to rank their top business challenges in a provider survey in autumn 2023. The results are shown in Table 17.

The majority of responders identified the first four listed issues as their biggest challenges and these are the same as four as reported in 2023, but with business cost inflation now identified as the biggest challenge and staff recruitment now identified as second. A study by the Institute for Fiscal Studies<sup>14</sup> substantiates provider concerns about cost inflation and found that one of the biggest challenges facing early year’s providers now is the impact of rising costs. “Last year (2021–22), prices facing childcare providers were 11% higher than they had been three years earlier, before the pandemic. By comparison, over the same period, consumer prices had risen by 7%, while the prices in the economy as a whole had risen 9%.”

<sup>14</sup> <https://ifs.org.uk/sites/default/files/2022-11/Early-years-spending-update-the-impact-of-inflation-R229.pdf>

Table 17

Top Business Challenges in order of importance PVI Group Care Settings	
1	Business cost inflation
2	Staff recruitment
3	Attracting new customers
4	Cash flow
5	Developing business plans adapting to 30 hours & Wraparound initiatives
6	Staff well being
7	Understanding changing patterns of childcare needs
8	Managing relationships with parents
9	Staff training
10	Other

In relation to the recruitment of staff, providers were asked to identify their challenges. Figure 25 shows that lack of finding suitable candidates and inability to meet candidates salary demands were identified as the biggest issues.

Figure 25

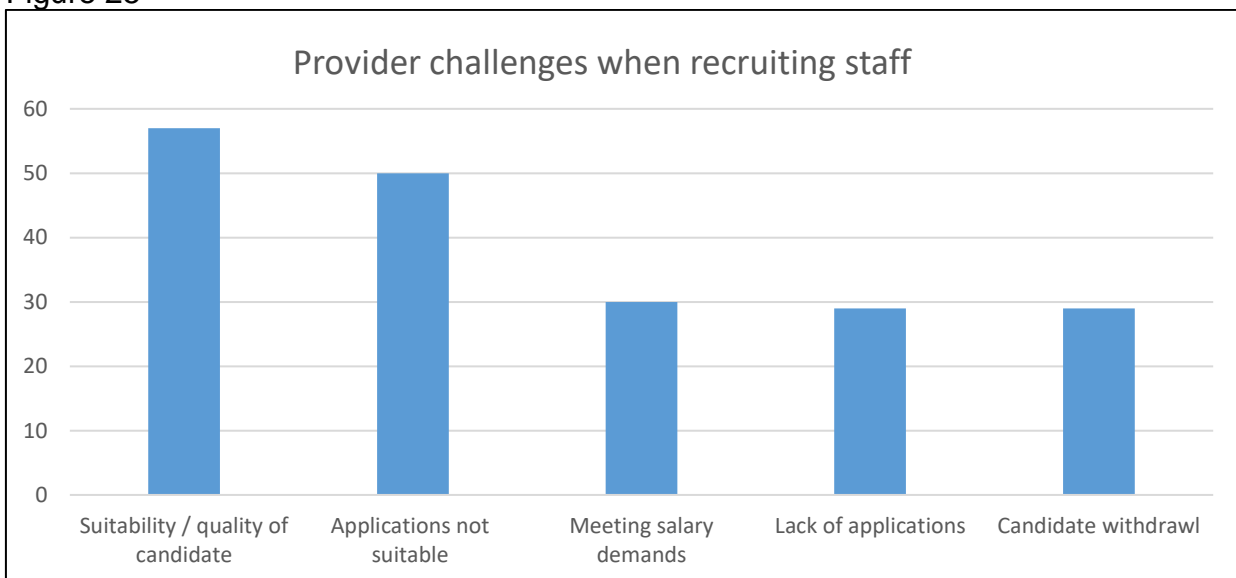
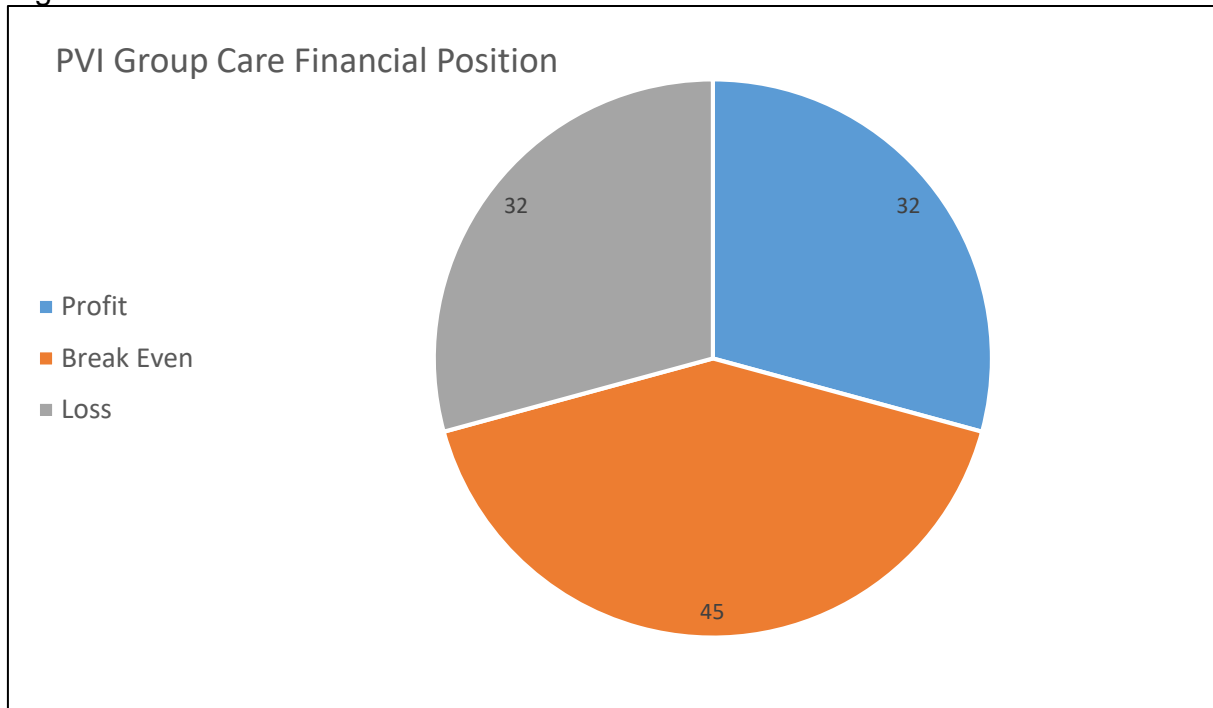


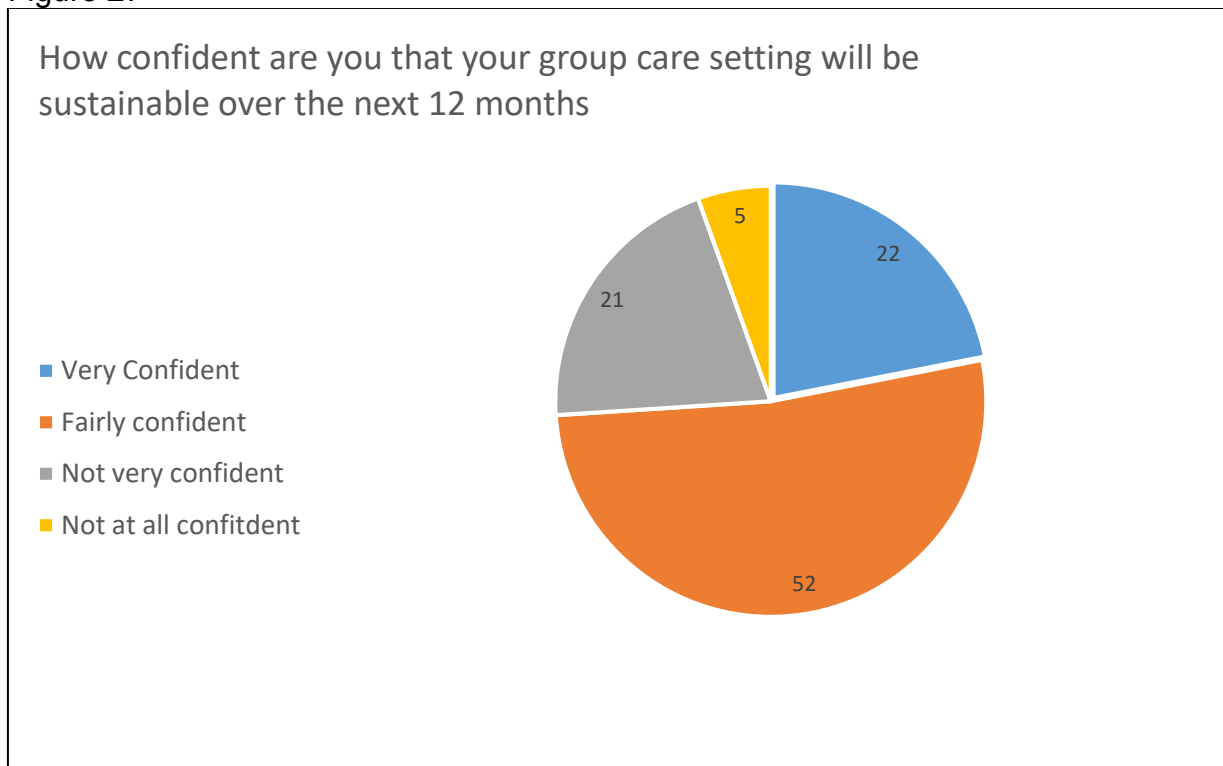
Figure 26 shows that off the 60 PVI group care settings that were able to answer, 77% reported as operating at break even or profit, with 32% reporting they currently operated at a loss. A further 28 survey responders said they did not know. These are similar findings to the CSA 2022.

Figure 26



When asked about sustainability over the next 12 months 74% of the 73 PVI group care responders said they were either very confident or fairly confident of their continuation, 21% were not very confident and 5% (4 settings) not at all confident. This is summarised in figure 17.

Figure 27



For childminders, the challenges that were identified as the most significant are shown in table 18 below:

Table 18

Top Business Challenges in order of importance Childminders 2023	
1	Business cost inflation
2	Attracting new customers
3	Cash-flow
4	Developing business plans adapting to 30 hours & Wraparound initiatives
5	Managing relationships with parents

Figure 28 shows childminders financial position. Of the 48 childminders that were able to answer, 33% reported as operating at a profit, 46% at break even and 21% at a loss. A further 13 responders said they did not know.

Figure 28

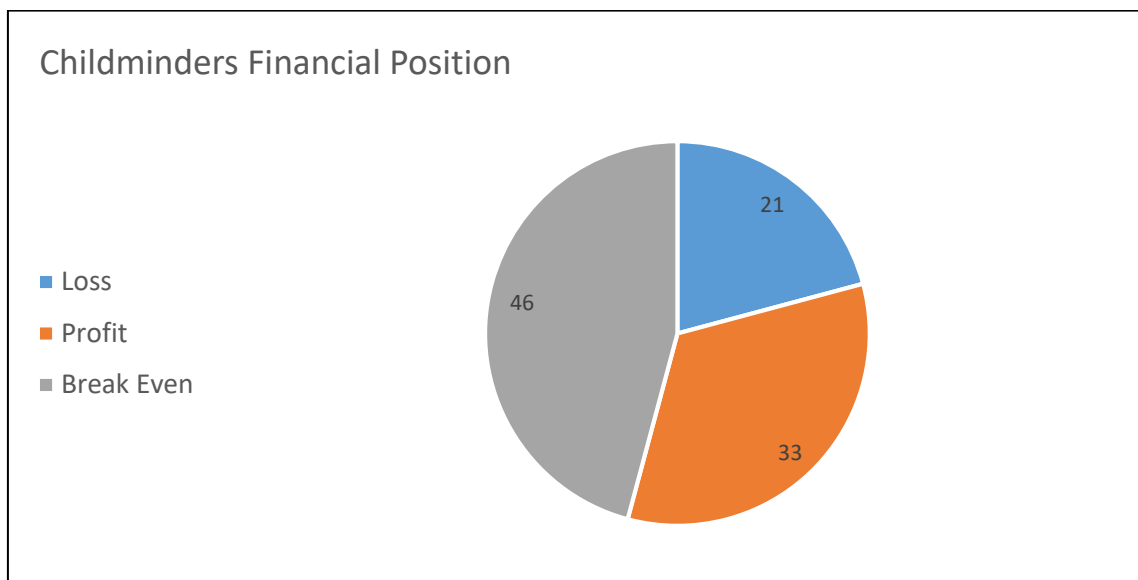
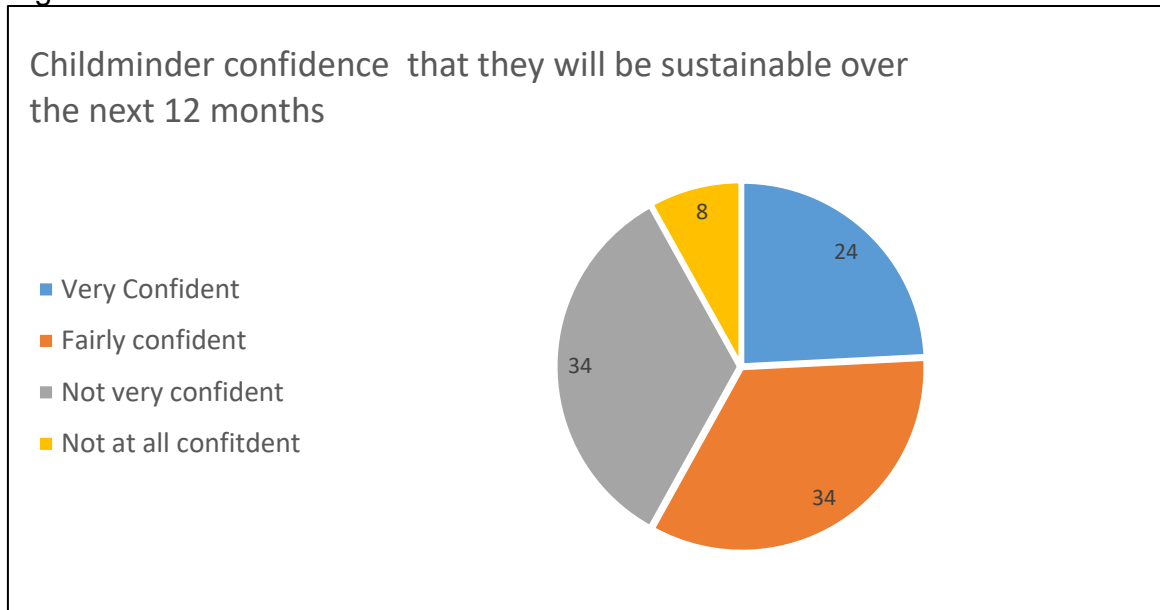


Figure 29 shows survey findings in relation to sustainability. When Newham childminders were asked about sustainability over the next 12 months 58% of the 62 responders said they were either very confident or fairly confident of their continuation, 34% were not very confident and 8% (5 childminders) not at all confident.



Figure 29



The legacy of the COVID-19 and the continuing cost of living crisis has had a strong impact on the business challenges that have been identified.

According to an Institute of Fiscal Studies report,<sup>15</sup> Covid-19 is likely to have significantly damaged the finances of many childcare providers who rely on income from parent fees. This will have included private, independent and voluntary nurseries, out of school settings, childminders and some pre-schools. Despite major government support programmes, the study finds that between a quarter and fifth of all private nurseries would have run at a significant deficit during lockdown.

Newham providers were invited to provide observations about the sufficiency of childcare in the borough and ways in which they could be supported to meet parental needs. Table 19 shows the responses that were received and these are grouped in the themes that emerged. There are a mix of experiences and opinions, but many providers call for additional funding to reflect higher costs, requests for additional help with marketing, training and support, including SEND, staff recruitment and identifying business opportunities.

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<sup>15</sup> IFS Report R175 Challenges for the childcare market: the implications of COVID-19 for childcare providers in England, Sept 2020

Table 19

<b>Funding and Finance</b>
Increase childcare hourly rates to meet cost of provision
More financial help needs to be made available directly to childcare providers. Childcare providers should not have to pay business rates. As the funding is only for 38 weeks, subsidies should be paid to settings for the other 14 weeks to make up the shortfall during half terms to ensure settings sustainability.
More funding is requires to put extra staff
More support with funding and how to apply
accepting funded children needs to be cost efficient for settings
Need more grant for resources. More funding for staff courses and funding for their cover. doing support plans with parents. More free courses
<b>3 YEARS FUNDED RATES NEED TO INCREASE DUE TO COSTING</b>
Higher funding for 3/4 year olds, cost of living crisis pushing hard on parent wallets and nurseries being made out to be the devil in the press as we need to charge money above poorly marketed government funded hours
Is about payments from universal credit, it takes too much time for payments to go through, some parents don't know how to go about it
review of childcare fees and payment method
Help with fees.
To have funding for resources and materials to provide children's needs.
U take over the paperwork and send the childminder their monies weekly

<b>Marketing and Promotion</b>
If Newham can have an Input in the advertisement of childcare providers within the Borough and liaise with the settings to understand the space available to refer parents to where there is emptiness.
The local authority should support settings in areas where the childcare population is low. For example, families have been moved out of Custom House due to the regeneration in the local area. Settings in the area need support to ensure that we are able to continue operating to meet the needs of parents who will be entitled to the 15/30 hours in the next two years and the families who will move into the area when the first homes are completed in 2025. Core training such as first aid should be free as this adds to the current burden that settings are facing. As the amount of work that setting will need to do will most likely increase if more children only take up the funded hours, settings might not be able to fill all of these spaces due to the pattern of demands from parents.
More advertising about the new free funding will help the patents
Finding it hard to fill in vacancies right now
Parents need to know more about free childcare and the advantage of attending nuresery or preschool before begin their compulsory education in primary school.
Help providers to attract funded children for places.
No more agencies, council/ government to give accurate information,
More opportunities to attract customers i.e coffee mornings. Opportunities for nurseries to support childcare qualification to be tailored and more effective to the quality of staff coming through with qualifications.
I feel childminders and nursery's need to have the same facilities. As a Childminder I feel we hardly get any funded children due to the fact that nurseries are taking in more children than what they should. It would be helpful if our local schools had advertised to parents of the local childminders.

<b>Support for SEND</b>
extra support for SEN children.
extra support and fund with the SEN children

Lot's of children coming through with SEND or speech concerns. The SENCO support and funding needs to be looked into
There needs to be a shorter turnaround time on children with SEND. 2 year old checks should be identifying & fast forwarding referrals. Parents are usually in denial and it is not just by having a nursery place that a child will thrive. Most of the time, children need early support and professional engagement. Children with additional needs, need to come into the system having already been identified as with needs and funding allocated.

<b>Training</b>
I need to be trained for funded hours scheme
Staff training is a fundamental part and we have been able to access excellent training which must continue to maintain standards and ensure adaptability. Really need regular DSL training.
Training on the provider portal is very much geared towards nursery providers. While some of this is transferrable, we would welcome some training for children from 5 - 11. For example, we would welcome Behaviour Management training for working with older children. We would also welcome more general support from BN for the Out-Of-School sector. There is currently no forum for us to meet and get updates from LBN at present.
Provide training directly for parents who are struggling with specific childcare needs. Better communication with providers regarding referrals. Having a dedicated early years advisor who can be available to all settings, who we can have dialog and communication with.
To train provides in different language such as Bengali language so that we can communicate with the parents as I struggle sometimes to communicate with the parents that comes on show round. Training parents to understand what Guidelines we work towards
More training
<b>Staff recruitment</b>
to have free data (not costly agencies) for staff recruitment
qualified and able staffing is the biggest issue
Support with staff applicants

<b>Supporting Business Opportunities</b>
As an organisation, XXX is always looking to grow and we would appreciate if you would keep us informed of any possible buildings/nurseries to acquire.
Having the trained staff and ability to provide, but unable to obtain suitable premises.

<b>Other</b>
Parents accessing childcare through universal credit.
we are often asked about after school facilities and we know this is a lacking in the area.
Less Paper work
The threshold for parents on universal credit. What's the minimum earnings for parents to be eligible for free offer
More support
Through networking
Childminder should be supported with bigger premises to place more children. Eg: childcare on non domestic premises for childminders. Equipping childminders in newham will really help. Thanks.
Majority of parents sign the contract with longer hours so that they can get the claim for childcare and after 1 or 2 weeks either they cancel the contract or reduce the hours It Makes it hard for the Childminders sustain their business

## 4 Supply of services for over- fives

### 4.1 Types of registered provision for over 5s

Out of School provision includes breakfast, after school and holiday care. Not all out of school provision has to be Ofsted registered and there is no legal requirement to inform the Local Authority of operation, therefore it is difficult to determine the exact number of places available to parents. Included in this report are:

- Childminders who are registered to look after children in their own home. Childminders are often flexible about the hours they work. Many offer a school pick up and collection service from local schools.
- PVI registered out of school provision provide a range of breakfast, after school and holiday care. Many offer a school pick up and collection service from local schools, nurseries and pre-schools. They can be run on or off a school site and may be operated by private, voluntary or independent groups. Included here are also day care settings where they are registered for over 5s and are known to offer out of school services.
- Out of School activities operated by Primary Schools. Many schools provide extended services for children including after school activities, such as homework clubs, film clubs etc. which may not be formally classed as childcare but may still provide a safe and fun environment for children whilst parents/carers are at work or studying. A survey of Newham's Primary Schools, Academies and Nursery Schools was undertaken to map the services that are available. This resulted in 69 responses, census data on wraparound provision has been used for the further 10 schools who did not respond to our survey. There are some discrepancies between the childcare hours and places available reported in our survey and those reported in schools census returns, this is likely to be the result responders differing interpretations of what activities constitute childcare and further work is being undertaken to ensure that data on the supply of wraparound childcare is fully robust. Census reported out of school places are higher than those provided by the schools' survey overall and for the purpose of this report we have used the more conservative survey reported places to consider sufficiency.

### 4.2 Planned Expansion of wraparound care for children of primary school age

The national wraparound childcare programme is part of the childcare reforms announced at the 2023 Spring Budget. The government's ambition is that by 2026, all parents and carers of primary school-aged children who need it will be able to access term time childcare in their local area from 8am-6pm, so that parents can access employment and improve labour market participation. To support this ambition, the government announced that it will provide up to £289 million of start-up funding over two academic years to support local authorities and providers in England to introduce or expand childcare provision on either side of the school day, which parents of primary school-aged children will be able to pay to access. This programme will only focus on primary school-aged children from reception to year 6, Monday to Friday during term time. The expectation is that all wraparound provision is 8am-6pm, enabling parents to work a

full day with travel time, unless data shows that local demand is for different hours, for example reflecting local labour market patterns.

The programme is not prescriptive in terms of delivery models and could include:

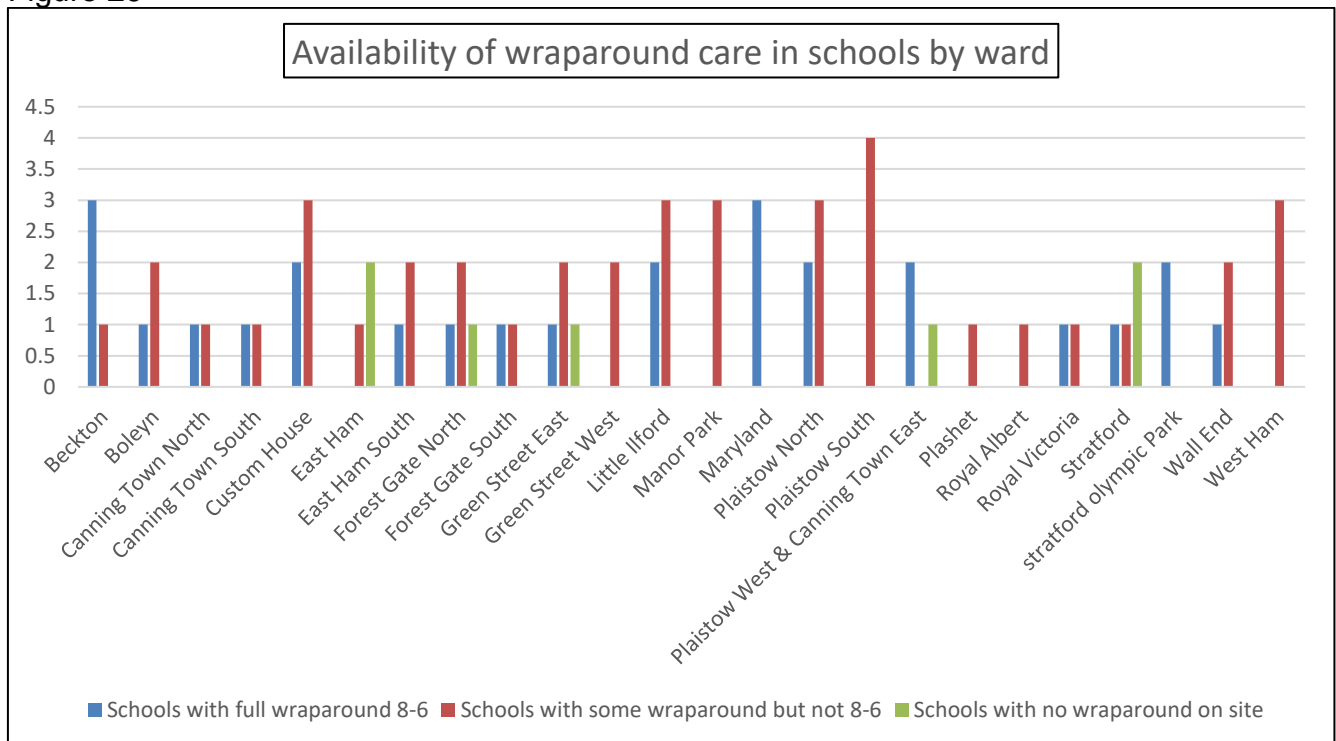
- School based provision, delivered by the school
- Private provider run provision on or off school site
- Community model, with multiple schools wraparound on one site delivered by any appropriate body
- Childminders signposted to parents by LA and School
- Other EY providers registered to care for older children, such as a nursery or play group.

The roll out of the wraparound programme is planned to start from September 2024, with capacity building funding and implementation ending in March 2026, after which time provision is expected to be sustainable through parent fees.

Newham is in the process of conducting a detailed mapping exercise to identify gaps in wraparound service supply. The findings will be used to identify the priorities for revenue and capital funding for expanded wraparound services to be rolled out in 2024/25.

Figure 29 shows our current analysis of the overall availability of wraparound provision delivered by schools or PVI providers on school sites. This shows a mixed picture of availability for 8am to 6pm care. There are 26 schools where there are 8-6 places available on site, a further 40 have some wraparound either breakfast and/or after school but not across a minimum of 8-6 and there are a further 10 Schools where no wraparound care is available on site.

Figure 29



### 4.3 Overall number of Out of School registered places available for over 5s

Table 20 shows that in total, there are 189 recorded providers of childcare for school age children during term time. Of these 86 are childminders, 30 are PVI out of school clubs or PVI nurseries that also offer out of school services and 73 are schools. The number of places shown overall is higher than last year; more school places are recorded as we have achieved a full data capture, but childminder and PVI Out of School places have declined. All schools that responded to a question on admissions said that the out of school services were open to pupils of the school only. Of the 189 providers overall, 54 PVI providers and 11 schools also offer childcare for children of school age during school holiday periods.

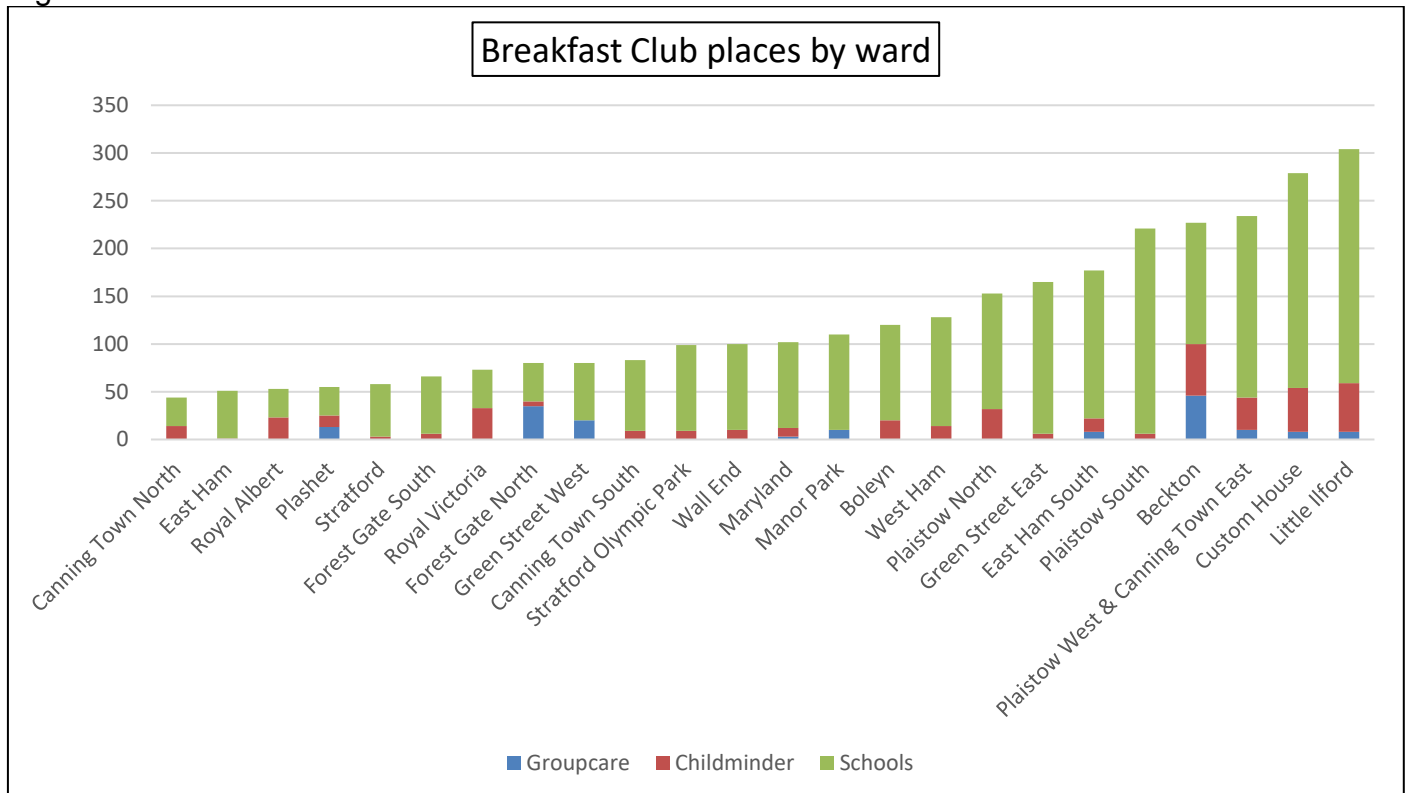
Table 20 Out of School Providers and Places in Newham 2023

Type of Provider	Number of Providers	Number of Places	Places CSA 2022
Childminders	86	411	435
PVI out of school clubs	30	515	659
Schools	73	2420	1265
Total	189	3346	2359

#### 4.3a Breakfast Club Number of places available in each ward over 5s

Figure 30 shows that the distribution of the 3,062 recorded breakfast club places across the 24 wards. Schools are the biggest provider of breakfast club places (2,490), alongside childminders (411) and PVI Out of School (161), the average number per ward is 128. There is wide variation between wards. Little Ilford (304), Custom House Beckton (279), Plaistow West (234) and Beckton (227) have the most places. The least recorded places are in Canning Town North (44), East Ham (51), Royal Albert (53) and Plashet (55).

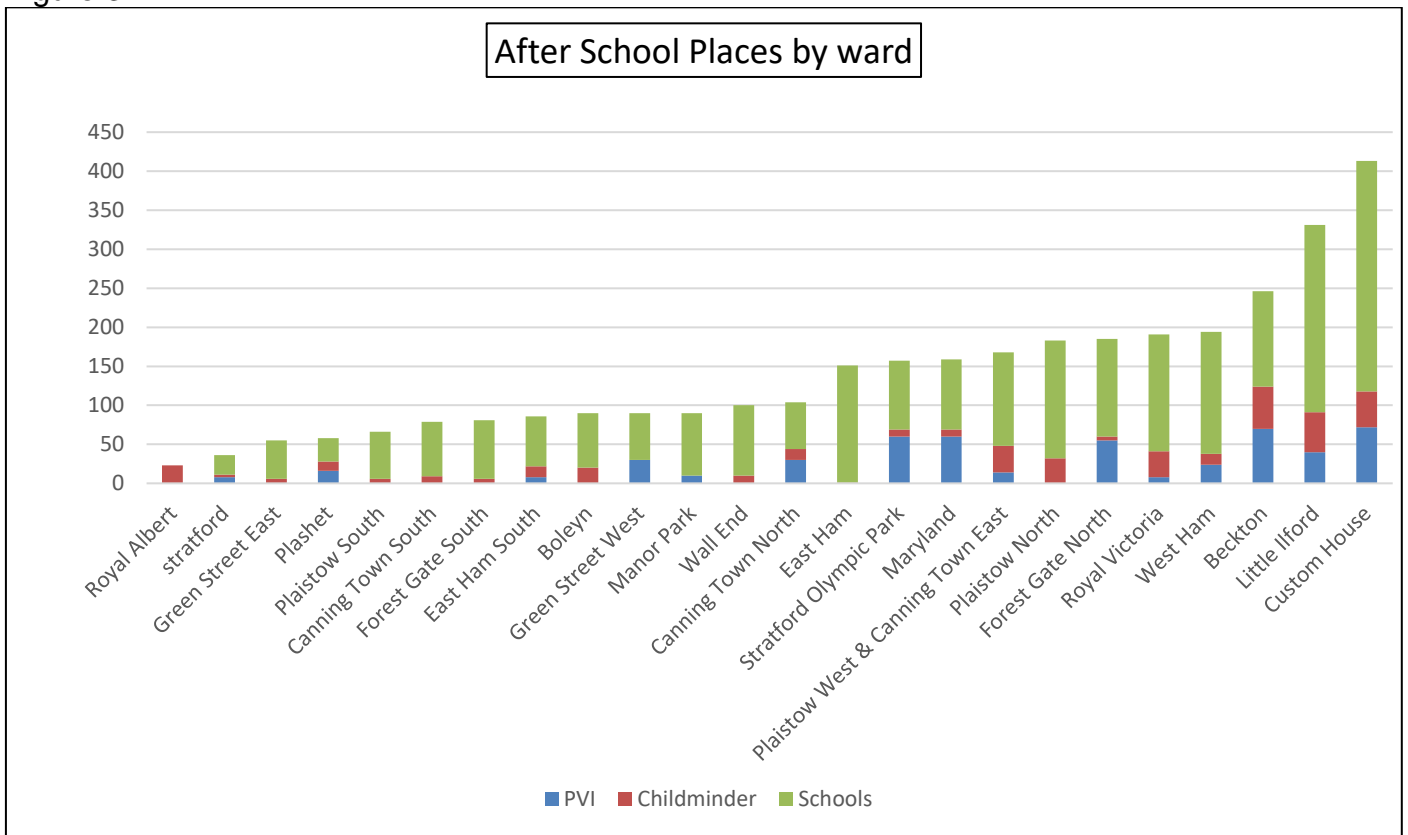
Figure 30



4.3b After School Club Number of places available in each ward over 5s

Figure 31 shows that the distribution of the 3,336 recorded after school places across the 24 wards. Schools are the largest provider of after school places (2,420), second are PVI Out of School providers (505), alongside childminders (411). The average number per ward is 139. There is wide variation between wards. Custom House (413), Little Ilford (331), Beckton (246) and West Ham (194) have the most places. The least recorded places are in Royal Albert (23), Stratford (36), Green Street East (55) and Plashet (58).

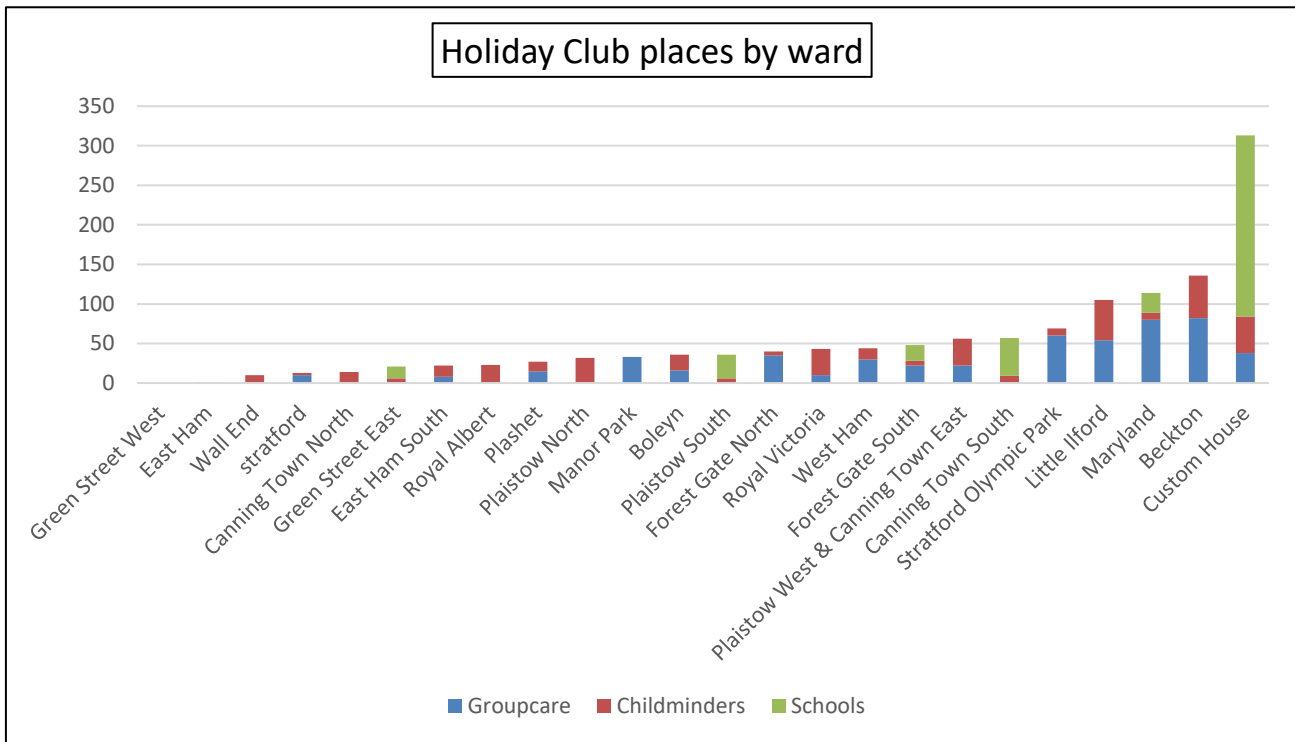
Figure 31



4.3c Holiday Club Places available in each ward over 5s

Figure 32 shows that the distribution of the 1,293 recorded holiday club places across the 24 wards. PVI out of school settings are the biggest provider of holiday club places (515), second are childminders (411) with a minority of schools also offer places (367). The average number per ward is 54. There is wide variation between wards. Custom House (313), Beckton (136), Maryland (114) and Little Ilford (105) have the most places. The least recorded places are in Green Street West (0), East Ham (1), Wall End (10) and Stratford (13). Two wards have only childminder places available to support childcare in the holiday periods.

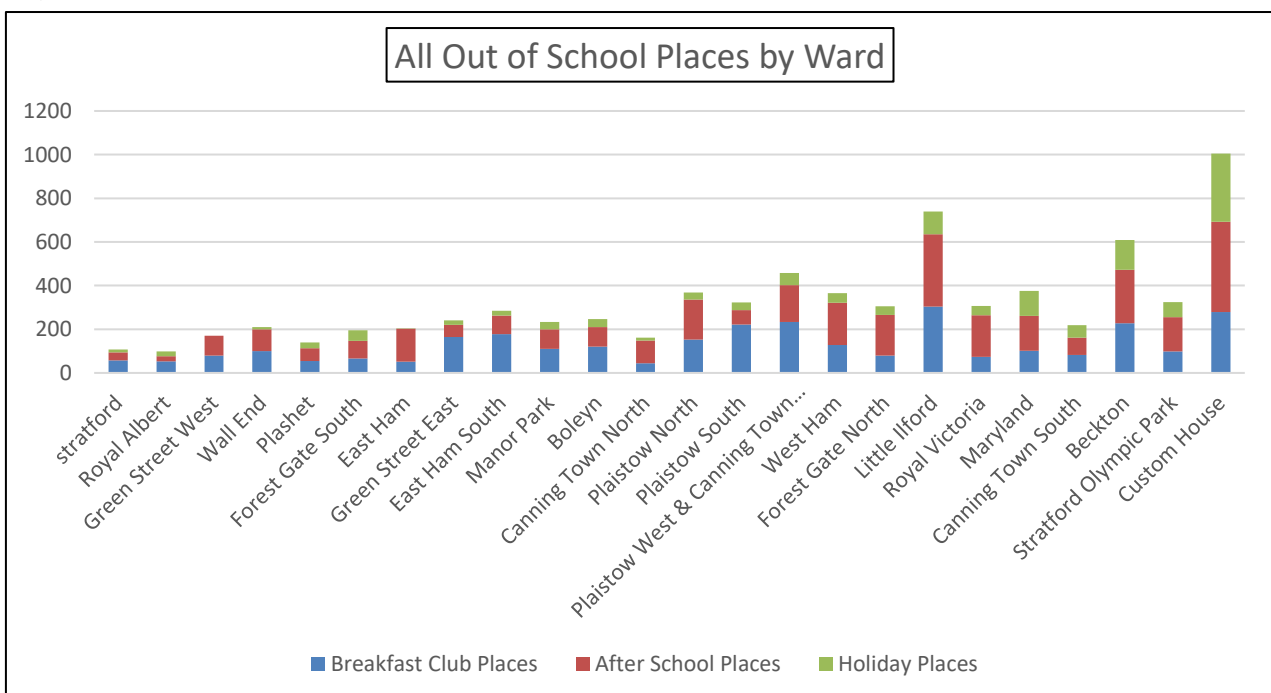
Figure 32



4.3d All Out of School Places available in each ward over 5s

Figure 33 shows all the breakfast, after school and holiday places that have been identified for each ward. The overall places available has been compared against the 5-14 age range population for each ward and ranked, so that the wards on the left have the least number of places for the resident 5-14 population. These include Stratford, Royal Albert, Green Street West and Wall End. Those wards to the right have the most places for children resident in the ward and include Custom House, Stratford Olympic Park, Beckton and Canning Town South.

Figure 33

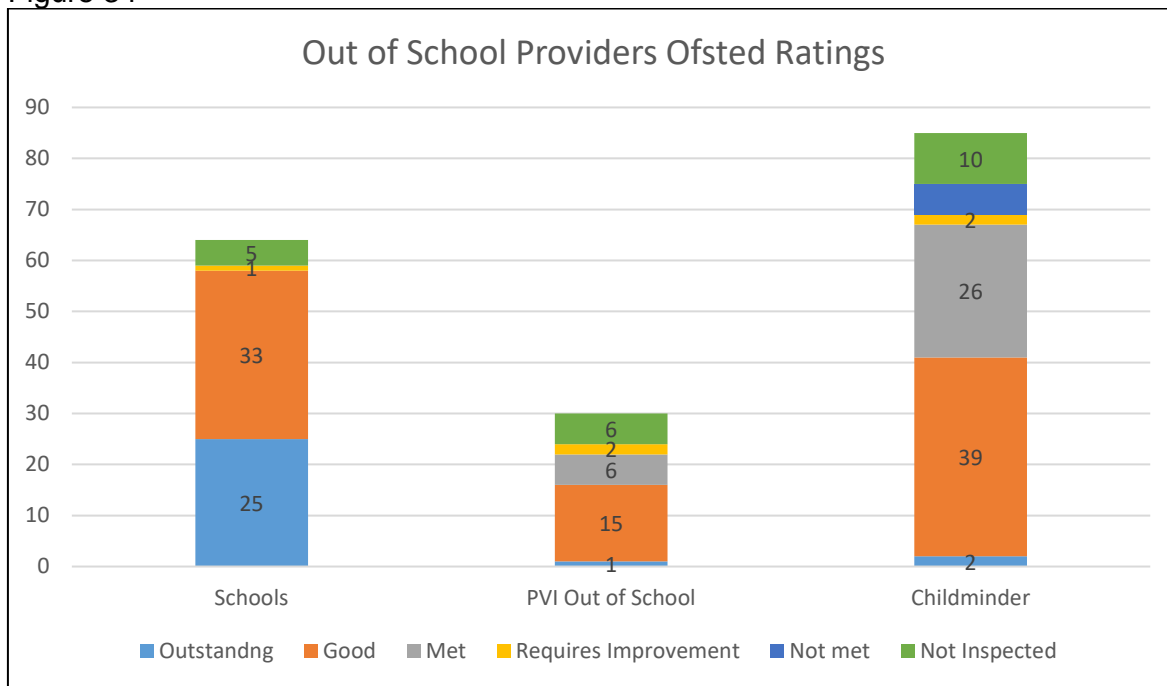




#### 4.4 Out of School Provider Quality

Figure 34 summaries the Ofsted ratings for Newham’s schools, PVI group care and childminder out of school provision. Most provision in schools is delivered by school staff and where this is the case, there is no separate Ofsted grade for the delivered out of school club and the inspection grade for the school has been included. Of the settings that have received an inspection, 93% are outstanding, good or met. There are 21 settings awaiting their first inspection.

Figure 34



#### 4.5 Cost of childcare for over 5s

Out of School services are generally financed through parental fees. Some parents are able to access some help with childcare costs through schemes such as tax free childcare, universal credits or tax credits.

Table 21 shows that services for over 5s are more expensive per hour when delivered by a childminder rather than a PVI group care provider or via schools. Childminder services commonly include pick up or drop off, and may be able to offer greater flexibility with hours. Some of the schools surveyed do not charge for their breakfast or after school activities and the average number of hours are less.

Where comparison can be made, average charges in Newham for group care and childminders are above the average for England and are more aligned to London averages.

Table 21

Average Weekly costs & Occupancy of Out of School Provision for over 5s						
Provider Type	Newham average hours per week	Newham average hourly rate	Newham average weekly rate	Inner London	Outer London	England
<b>Out of School Group care</b>						
Breakfast	8	£5.00	£40			
After School	15	£4.93	£74	£68	£79	£68
Holiday Scheme	47	£4.13	£194	£161	£157	£148
Average occupancy autumn 2022			33%			
Average occupancy autumn 2023			36%			
<b>Childminder Service</b>						
Childminder breakfast / drop off	11	£6.00	£66			
childminder pick up / after school	15	£6.12	£98	£106	£105	£72
Childminder full day	40	£6.08	£243			
Average occupancy autumn 2022			27%			
Average occupancy autumn 2023			30%			
<b>Out of school by Primary School</b>						
Breakfast	5	£1.92	£9			
After School	11	£3.60	£45			
Holiday (10 Schools only)	30	£1.56	£43			
Average occupancy autumn 2022			75%			
Average occupancy autumn 2023			77%			

#### 4.6 Occupancy of childcare for over 5s

According to Newham's provider survey, Out of school services in schools were relatively full in autumn 2023 at 77%, similar to the 75% reported in 2022.

Occupancy for out of school care is at a much lower base level for childminders.

Childminders reported an average occupancy of only 30% in autumn 2023, marginally up from the 27% they report for autumn 2022.

PVI out of school group care occupancy stood at 36% in autumn 2023, marginally up from the 33% reported for autumn 2022. The 13 settings set up specifically for out of school reported higher occupancy rates than the nursery settings that offer out of school services as an add on to their core business.

#### **4.7 Hours of Operation childcare for over 5s**

According to the Newham provider survey 2023 the average childminder hours for breakfast clubs is 11 hours per week, for group care it is 8 hours per week and for Schools 5 hours. Across all individual providers the range of hours offered is between 3 and 15 hours per week.

The average childminders hours for after school care is 15 hours per week, for group care it is 15 hours and for schools it is 11 hours. The range of hours offered across all individual providers is between 4 and 25 hours per week.

The average childminder hours for holiday care in Newham is 40 hours, for group care it is 47 hours and for schools it is 30 hours. The range of hours offered across all individual providers is from 30 to 60 hours per week.

#### **4.8 Newham Holiday Activities and Food Programme**

School holidays can be a particularly difficult time for some families because of reduced income or increased costs relating to food and childcare. For some children this can lead to a holiday experience gap, with children from disadvantaged families less likely to access organised out-of-school activities and more likely to experience 'unhealthy holidays' in terms of nutrition and physical health. These children are also more likely to experience social isolation. Free holiday club places, funded by this grant, are a response to this issue.

In November 2020, to respond to this issue, the government announced the expansion of the Holiday Activities and Food (HAF) Programme across the whole of England. The programme is targeted at school-age children, who are eligible for and in receipt of benefits- related free school meals. A small number of children who are considered 'otherwise vulnerable' can also access the programme.

The council's 2023 HAF programme has been delivered in partnership with schools, the Voluntary community and faith sector (VCFS) and other organisations. The fully inclusive programme has created free places at holiday clubs across the borough during the Easter, summer and Christmas holidays. The programme is an opportunity for the Out of School providers to contribute to the outcomes of the programme and support their own sustainability.

The programme, which forms part of the council's Young People and Food Security Strategy is helping to tackle food poverty and holiday hunger faced by around one third of Newham's children and young people. It also aims to ensure children:

- eat more healthily over the school holidays
- are more active during the school holidays

- take part in engaging and enriching activities,
- are safe and not socially isolated
- have a greater knowledge of health and nutrition

In addition, it helps their families to:

- develop their understanding of nutrition and food budgeting
- access other information and support, for example, housing, health and employment

The Easter 2023 programme attracted 1987 children and young people, a decrease of almost 23% on the previous year. This can be partially attributed to Ramadan, and parents not taking their children to morning sessions due to them being awake late into the night and very early in the morning. While the summer programme was able to reach 5310 children, which is an increase of almost 25% on 2022's attendance. The Christmas programme attracted 3028 children and young people, this was increase of almost 5%.

The HAF Programme provided 79,741 meals during 2023.

The government's Autumn Budget and Spending Review confirmed over £200 million a year, until 2024, for the continuation of the nationwide programme. The Department for Education has now confirmed Newham's grant allocation for 2024 of £2,047,240.

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