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the future for education in Hackney



Hackney Learning Trust

Childcare Sufficiency Refresh 2009 - 2010



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EXECUTIVE SUMMARY

- 1.1** As part of this childcare sufficiency assessment refresh, questionnaires were developed and distributed across the borough for the attention of parents and providers. In total, 465 parents, representing 890 children, and 54 providers responded. The level of response to these questionnaires has been high, demonstrating the importance of good quality childcare to residents and providers within Hackney.
- 1.2** Overall, the level of occupancy within settings suggests that the current childcare market is sufficient. However, there are areas with high occupancy levels which bring the averages of lower areas up. In certain settings and planning areas within the borough there are higher than average waiting lists, which may be the result of locality, cost, reputation or type of provision. In the case of locality, alignment of childcare with population numbers may need to be explored further.
- 1.3** With the current stabilisation of overall birth rates within Hackney it is unlikely that there will be a higher than normal increase in overall demand for childcare. However, in the north of the borough (the Stamford Hill area) there continues to be a sharp increase in birth rates which will inevitably manifest itself as an increase in demand for places for 3 to 4 year olds, as per the trend in Orthodox Jewish take-up. This increase may also put an additional strain on 0 to 2 year old provision within the rest of the community. This demand is currently being seen by providers, but at present the overall system appears to be meeting this demand.
- 1.4** As in previous years, the childcare market has endured the typical opening and closing of providers; an expected trend given the small nature of many childcare providers and the current economic situation. Generally, the childcare market seems to have held up well in the recession.
- 1.5** Alongside the potential impact of the recession on jobs and childcare arrangements, there is also the issue of cost of childcare and the disparity of earnings between Hackney and London as a whole, which has resulted in high levels of household income being spent on childcare arrangements.

2 INTRODUCTION

Background

- 2.1** The Childcare Act 2006 expands and clarifies in legislation the vital role The Learning Trust plays as a strategic leader in facilitating the childcare market. Section 6 of the Act gave them a duty of securing, so far as is reasonably practicable, that the provision of childcare is sufficient to meet the requirements of parents in the Hackney area in order to enable them to work or undertake education or training leading to work.
- 2.2** Section 11 of the Act placed a duty on The Learning Trust to have undertaken a childcare sufficiency assessment (CSA) by April 2008. This assessment was a necessary step towards securing sufficient provision, enabling The Learning Trust to identify gaps and establish plans to meet the needs of parents so that they can fulfil their Section 6 childcare sufficiency duty.
- 2.3** As a result of this legislation those responsible for the management of the childcare market should consider updating the assessment whenever new data becomes available, but should do so to the extent possible at least annually. This commission is in response to this requirement and is designed to complement previous updates of the original CSA, in preparation for a new full CSA before April 2011.

Project Remit

- 2.4** The Learning Trust required a 'refresh' of the assessment for 2009/10. This refresh sought to understand if/how childcare provision has changed since the last refresh conducted in 2008/09 and provide evidence and information to help them to shape a market that contains childcare that is sufficient, flexible, sustainable and responsive to parents' needs.
- 2.5** Specifically, the refresh was designed to answer the following questions:
1. Assess the supply and demand for childcare places for children under the age of 3?
 2. Assess supply and demand for out of school places?
 3. Explore if there has been an increase in birth rates in the Stoke Newington and Stamford Hill areas compared with the rest of the borough / rest of the country and what is the likely impact of this on childcare places?
 4. Has the take up of tax credits improved since the original childcare sufficiency assessment?
 5. Has the recession had an impact on the childcare arrangement of families and if so, what strategies could The Learning Trust adopt to support families and childcare providers?

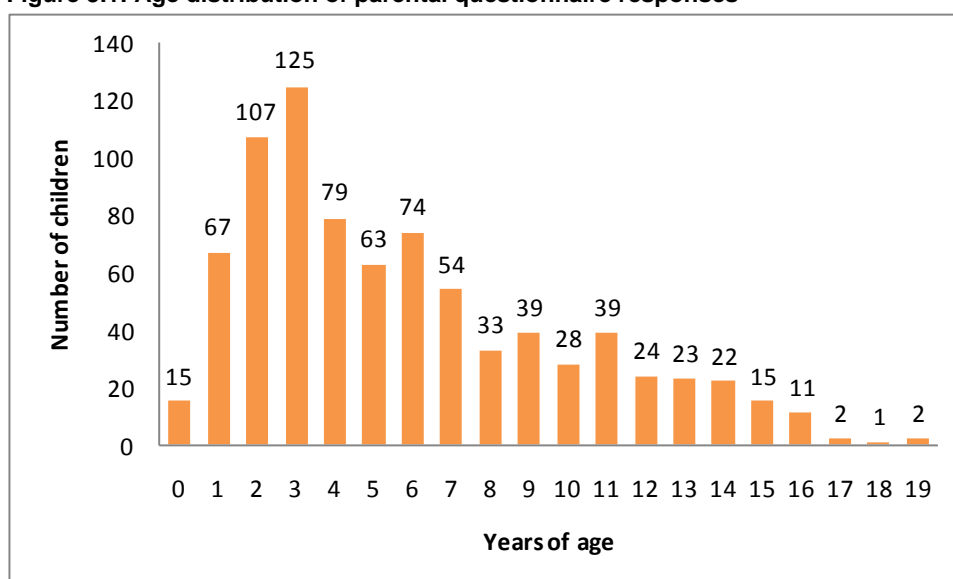
6. Has the uptake of childminder places changed since the previous refresh and, if so, in which age groups?
7. Have rental increases had an effect on the sustainability of childcare places, particularly on private, voluntary and independent (PVI) providers?
8. Are there sufficient childcare places available to the Orthodox Jewish community within Hackney?
9. Are there sufficient childcare places available for children with Special Educational Needs (SEN) and disabilities?
10. Explore if there is sufficient capacity in the childcare sector to provide wrap around services for 3 & 4 year olds, taking into consideration that schools will be moving to more part time places from April 2010.
11. Assess if the reputation of childminders has improved since the previous refresh?

3 METHODOLOGY

3.1 This 2009/10 CSA Refresh is designed to provide answers and update information on a set of 11 pre-defined questions (as per section 2.5). The research has been undertaken between December 2009 and February 2010 and has included a mixture of both quantitative and qualitative analysis.

3.2 As part of this process, questionnaires were developed and distributed across the borough to both parents and providers. In total, 465 parents responded, representing 890 children. The age and geographic distribution of these children is provided in Figures 3.1 and 3.2 respectively.¹

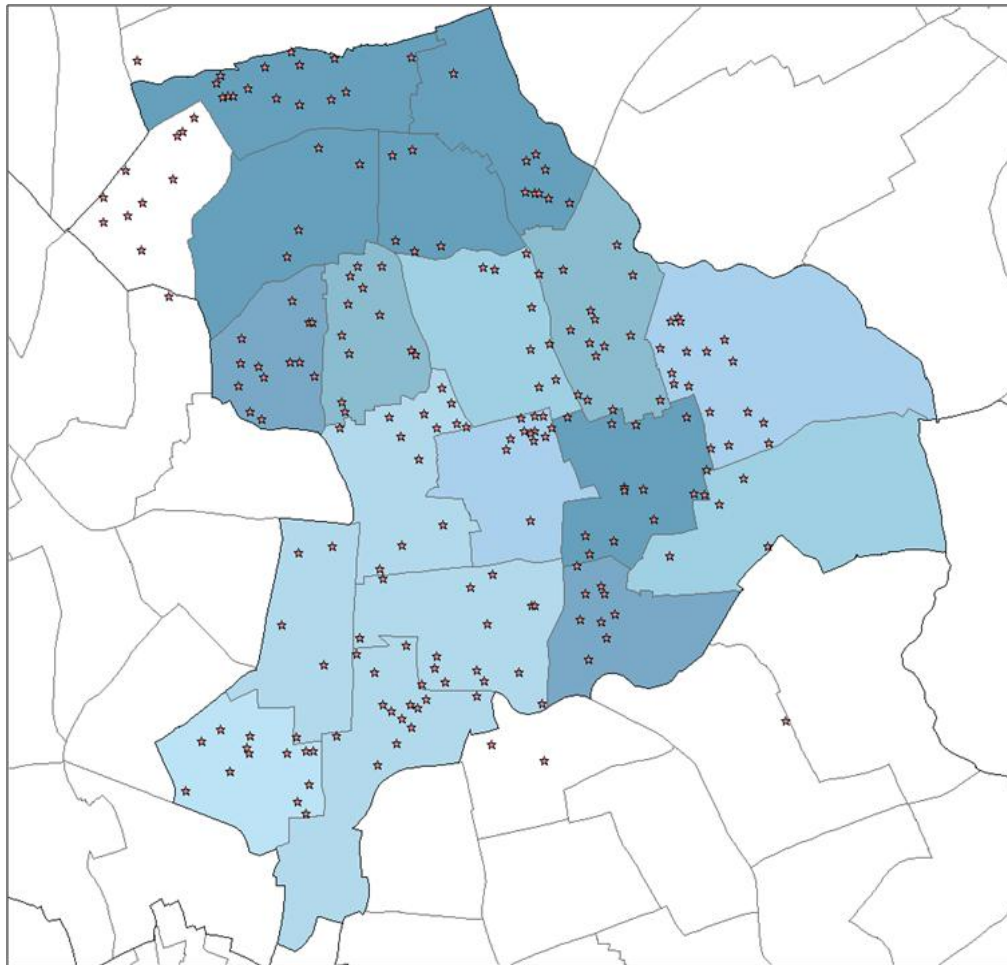
Figure 3.1: Age distribution of parental questionnaire responses



Source: 2010 CSA Refresh Parental Questionnaire

¹ Where information on age or location has been provided.

Figure 3.2: Geographic distribution of parental questionnaire responses



Source: 2010 CSA Refresh Parental Questionnaire

- 3.3** Fifty four responses have been received from providers². Day nursery provision had the greatest response (26 providers), followed by childminders (12 responses), playgroups / pre-school (9 responses), afterschool clubs (8 responses); breakfast clubs (3 responses) and holiday play schemes (1 response).
- 3.4** The Table 3.1 identifies sources that have informed each of the 11 questions. Section 4 of this report breaks down each of these questions and provides the information obtained through this research.

² Several providers offer multiple provision hence the total responses appears as 59.

Table 3.1: Methodology for analysis of the research questions

Research Question	Source of Information				
	Parental Questionnaire	Provider Questionnaire	Local Data	National Data	Staff Insight
1	√	√	√		
2	√	√	√		
3			√	√	√
4	√		√	√	
5	√	√	√	√	√
6	√	√	√		√
7		√	√		√
8	√	√	√		√
9	√	√	√	√	√
10		√			√
11	√		√		√

3.5 The Learning Trust currently plans its provision using the six areas identified below. Whilst these may be more reflective of community and/or geography, however, they do not directly overlap ward level information on demographics. Therefore, Figure 3.1 articulates the ward and corresponding planning area and will assist where data is only available by ward.

Figure 3.3: Planning Areas



Source: The Learning Trust

Table 3.2: Wards and corresponding planning area

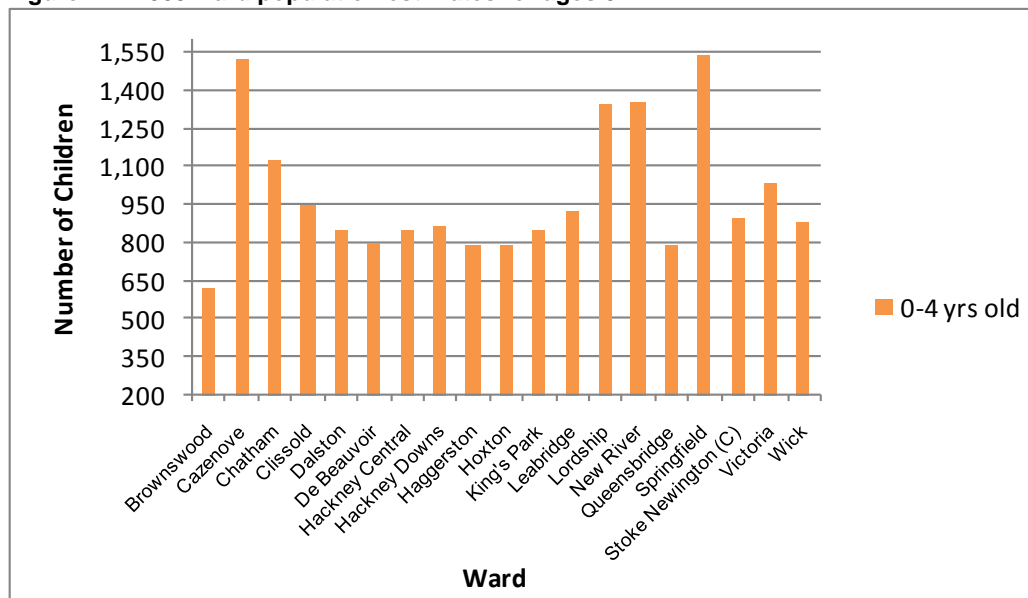
Hackney Ward	Corresponding Planning Area
Brownswood	A
Cazenove	B
Chatham	C, D, F
Clissold	A
Dalston	A, C
De Beauvoir	E
Hackney Central	C
Hackney Downs	C
Haggerston	E
Hoxton	E
King's Park	D
Leabridge	B, C, D
Lordship	A
New River	B
Queensbridge	E, F
Springfield	B
Stoke Newington Central	A, C
Victoria	F
Wick	D

4 DETAILED ANALYSIS

Research Question 1: Assess the supply and demand for childcare places for children under the age of 3?

4.1 The total number of children aged 0-4 (based on ONS 2009 Ward Population Estimates for England and Wales,) is 18,781. Figure 4.1 shows us that Springfield (1,541 children) followed by Cazenove (1,526), New River (1,351) and Lordship (1,348) have the highest number of children aged 4 and under. It is important to note that these areas contribute to the composition of the Stamford Hill area (as defined in section 4.19) which is home to the Orthodox Jewish community within Hackney. Brownswood is the lowest with 617 children.

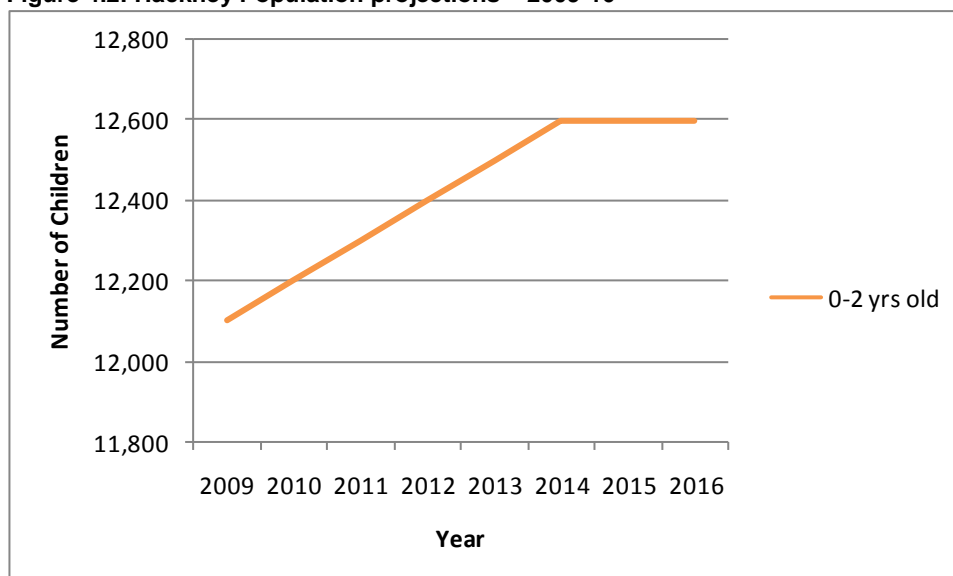
Figure 4.1: 2009 ward population estimates for ages 0 - 4



Source: ONS, mid-2007 experimental statistics

4.2 However, if we look at the 2006 GLA population projections we get a slightly different number of children for the age group 0 – 4 years old. These population figures estimate that there are 19,100 people within this age group as of 2010. This data provides us with a further layer of segmentation, providing numbers of children aged between 0 and 2 years of age, which was estimated at 12,100 for 2009 with an increase to 12,200 in 2010. Therefore, the estimated number of children between the ages of 0 and 2 years old stands at around 12,200, with figure 4.2 showing the projected increase up to 2016. The figures project a levelling off of the population at 12,600 between 2014 and 2016.

Figure 4.2: Hackney Population projections – 2009-16



Source: GLA Population Projections (2006 Round of Demographic Projections - RLP Low) This data are the sole copyright of the © Greater London Authority, 2006.

4.3 When looking at the capacity of childcare for children under the age of 3 we have focused on snapshot data collected by The Learning Trust in January, April and September 2009. This data provides capacity and occupancy for childcare (0 and 5 years year olds), which has been segmented further to identify provision for children aged 0 to 2 years old.³ However, because the data does not segment the ideal capacity and actual occupancy by age we have used the Ofsted registered capacity and realistic vacancies fields. It is also important to note that this approach does have its limitations, for example Ofsted capacity figures do not always reflect the ideal capacity for the centre, which may actually be slightly less. Also, realistic vacancies will take account of individuals who may be starting in the near future. However, this approach has enabled us to provide a picture of current for 0 to 2 years of age and as Table 4.1 demonstrates there were 1,941 places available in September 2009.

Table 4.1: Ofsted childcare capacity and vacancy figures for 0-2 year olds, September 09.

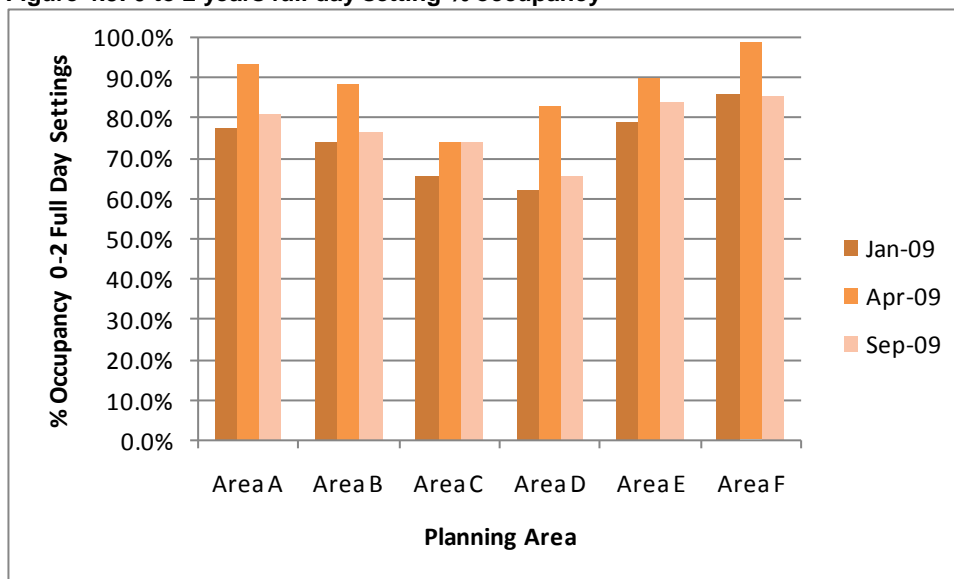
	Full Day Setting		AM – PM Setting		Total Capacity	Total Vacancies
	Capacity	Vacancies	Capacity	Vacancies		
Area A	360	68	28	8	388	76
Area B	206	48	98	24	304	72
Area C	341	88	12	6	353	94
Area D	279	96	42	28	321	124
Area E	401	65	12	0	413	65
Area F	152	22	10	0	162	22

Source: The Learning Trust

³ Provision includes nurseries, playgroups and children’s centres. For information on 0 – 5 year old provision see section 5.

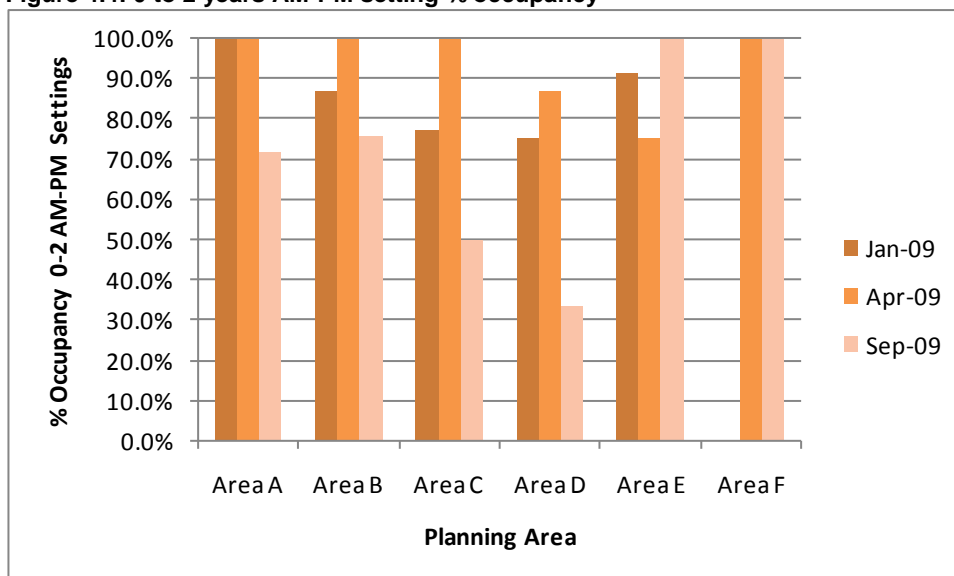
4.4 Whilst there appears to be some disparity between the number of children (estimated to be 12,200) and the capacity of the child care market (approximately 2,000 places), this does not take into account childminder provision (see Section 4.55) and also informal caring arrangements. A useful indication of if there is sufficient provision in place is to identify the level of occupancy within the settings. Using the realistic vacancy figures as a percentage of the overall capacity we have calculated the occupancy levels for full day and AM/PM settings (see Figure 4.3 and 4.4). The number of vacant places in September 2009 was 453.

Figure 4.3: 0 to 2 years full day setting % occupancy



Source: The Learning Trust

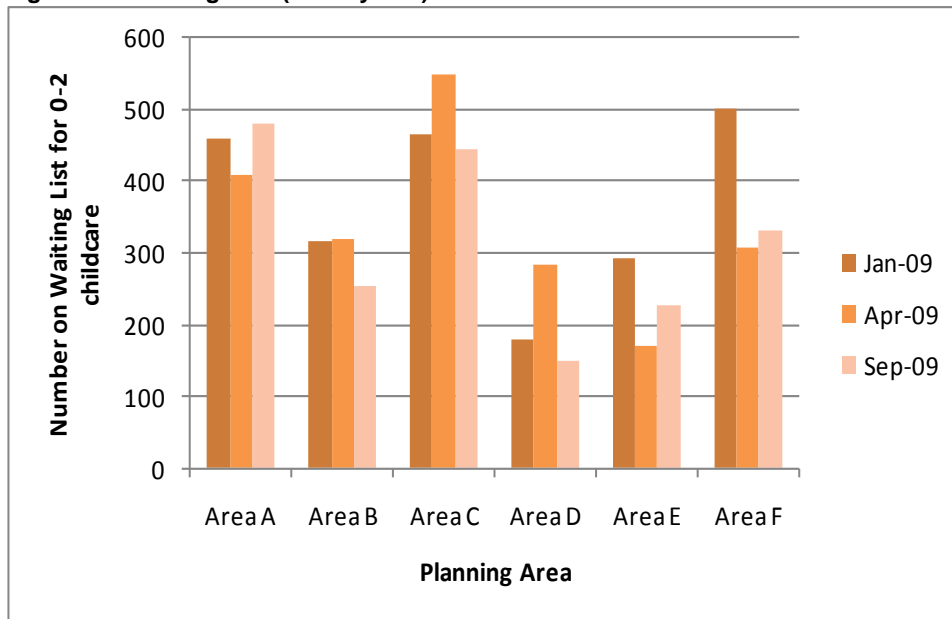
Figure 4.4: 0 to 2 years AM-PM setting % occupancy



Source: The Learning Trust

4.5 Overall occupancy levels have fallen between April 2009 and September 2009, at the same time there has been a 0.9% reduction in the capacity levels (over the same period). These figures correlate with a similar decline in the number of children on waiting lists (Figure 4.5). Because of the nature of waiting list data and potential inaccuracies due to age and duplication, it is difficult to draw solid conclusions from this; however, having seen a 7.3% decrease in waiting lists between April and September you would expect to see an increase rather than a decrease in occupancy.

Figure 4.5: Waiting lists (0 to 2 years)



Source: The Learning Trust

4.6 Even though the level of provider and parental response to the questionnaire is not sufficient to provide an assessment of current levels of supply and demand, it does enable us to gather some insight into the most current market situation for a sample of parents and providers. Key observations from these responses and the data held by The Learning Trust are provided below.⁴

4.7 In excess of half the day nursery respondents are recording some vacancies and current levels of occupancy for 0 to 2 year old provision are 78%. This is consistent with the data held by The Learning Trust, with an average occupancy for 2009 of 79.9% and yet demand and waiting periods are high. Despite this occupancy figure, 50% of respondents have perceived an increase in demand for 0 to 2 year old provision over the last 12 months, whilst 32% perceived a decrease in demand. Overall, 59% of those who perceived an increase in demand said they were able to fulfil the additional requirements.

⁴ For further findings see Section 5.

- 4.8** Only 21% of childminders experienced a rise in demand and this has predominately been within the 0 to 2 year old provision. The vast majority of those who did experience an increase in demand identified that they were unable to meet it.
- 4.9** The total childcare hours used by children aged between 0 and 2 years of age was 2,537 hours (average of 16.4 hours per week). In response to a question around the number of additional hours they may use if the services existed and were affordable, respondents identified an additional 1,206 hours. This represents a potential 47.5% growth and given the current levels of occupancy, this additional demand may exceed current capacity. However, due to the cost of this additional support it is likely that the extra demand will not be fully realised.
- 4.10** Around 30% of parents reported that they had found difficulty finding childcare for their children. The primary reasons cited for this were awareness of services and waiting lists, 31% had to wait for up to 3 months for a place, 16% had to wait between 3 and 6 months and 53% had to wait over 6 months for a place, the maximum being in excess of one year.

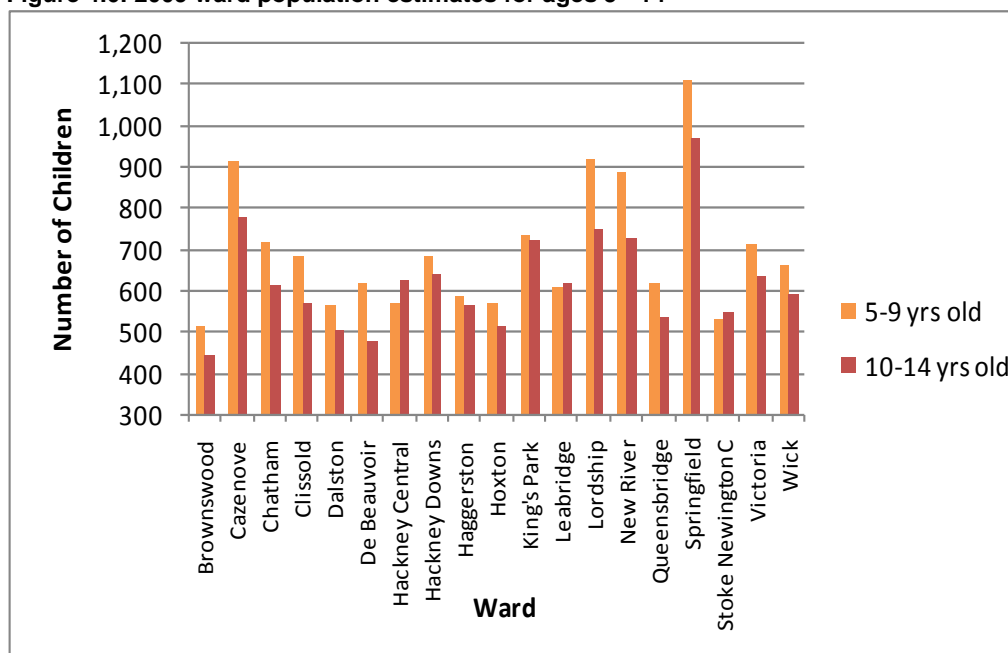
Summary & Recommendations

- 4.11** In certain instances there are higher than average waiting lists for parents and providers may be experiencing increased demand for places. However, the overall level of childcare occupancy for children aged 0 to 2 years old suggests that there is sufficient capacity at present to meet demand and instances of high demand may be attributable to the locality, cost or reputation of the provider. It is likely that the cost of childcare has resulted in demand staying in line with the levels of supply. Therefore, any subsequent change in legislation and affordability may affect sufficiency.
- 4.12** The information collected by the Family Information Service (FIS) could be useful in the future to help understand trends on a regular basis. A lot of information is currently collected by FIS and this information is then logged onto their system. However, this information is not necessarily aligned to the information required to inform strategic plans or assessments. For example, FIS recorded 522 enquiries for childcare places for children under the age of 5 between October 2009 and February 2010, this is an average of 104 enquiries per month, however, the way that the age bands are configured (0-5, 5-13 and 13-19) means that these figures cannot be further segmented to better understand the demand for childcare places for children aged 0 to 2 years old.

Research Question 2: Assess supply and demand for out of school places?

4.13 The total number of children aged 5 to 14 years old is 25,018 (based on ONS 2009 Ward Population Estimates). This age range has been chosen as it provides a more realistic view of school age children who may require out of school provision. As per Figure 4.6, this number can be further segmented to identify an estimated 13,208 children aged 5 to 9; and 11,810 aged 10 to 14.

Figure 4.6: 2009 ward population estimates for ages 5 - 14



Source: ONS, mid-2007 experimental statistics

4.14 In terms of out of school provision, information on capacity and occupancy is only available for after school club provision and this information is not currently gathered on a regular basis. Data collected by The Learning Trust in January 2010 identified capacity for 1,239 children; Table 4.2 breaks this capacity down by planning area. It is important to note that the response rate from providers to the Play Development Officer was 80% and does not take into account 8 providers and their capacity. Based on an average capacity of 38 (across those where information was made available), this could account for an additional 304 places, taking the overall capacity to 1,543.

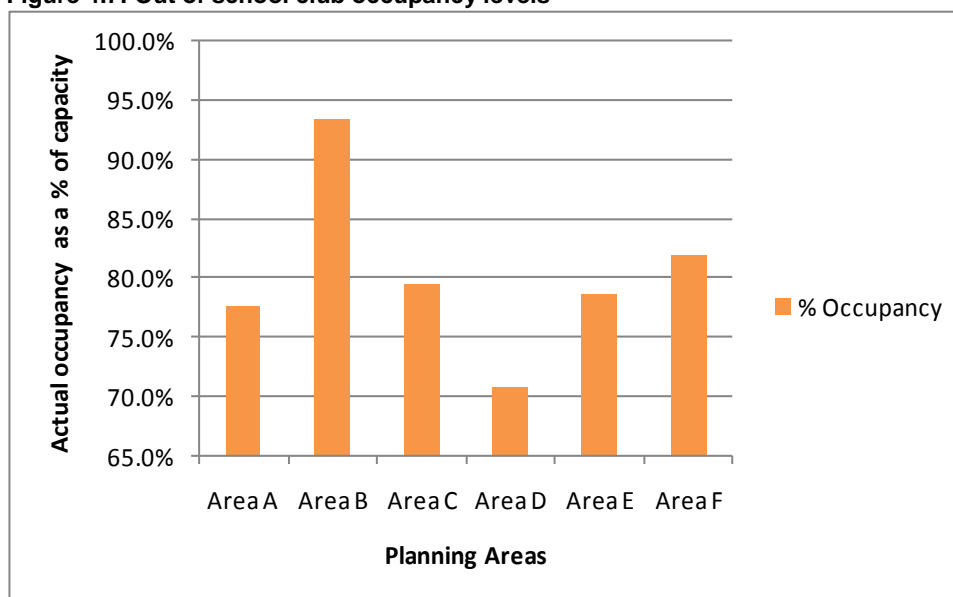
Table 4.2: After school club capacity by area

	Number of places	Number of providers where information is unknown
Area A	285	2
Area B	137	2
Area C	220	0
Area D	271	1
Area E	210	2
Area F	116	1

Source: The Learning Trust

4.15 Occupancy levels (Figure 4.7) for this provision show the average number of attendances as a percentage of the capacity of the provision. Here we can see that despite the differences between the capacity of out of school provision in comparison to the number of children aged 5 to 14, the current market, as a whole is not fully utilised, despite some providers operating with waiting lists. Provider responses to the questionnaire were limited, but where information was provided the occupancy levels supported the data compiled by the Play Development Officer and providers were equally balanced with regards to whether the demand trend had changed over the last 12 months.

Figure 4.7: Out of school club occupancy levels



Source: The Learning Trust

4.16 Conversations with the Play Development Officer revealed that there may be some inaccuracies within the data, in particular some of the specialist provision does not show waiting lists or the occupancy may seem a little low. This is in part due to inaccuracies in the recording and does not reflect the quality or the importance of the service. It is also important to note that breakfast club provision is not currently centrally recorded, therefore at present we are only able to understand half of the potential out of school provision that is available.

4.17 With regards to alignment of capacity to the school age population size, as identified in section 4.11, there appears to be some noticeable differences, which may contribute to waiting lists and parental perceptions around the need for more clubs. For example, Springfield and Cazenove, located in Area B are the most densely populated with 5 to 14 year olds yet the area has the second lowest capacity and the highest occupancy level (Figure 4.7). Area D has the second largest capacity and the lowest level of occupancy. This area covers King's Park, Wick and Chatham wards, which are not as densely populated.

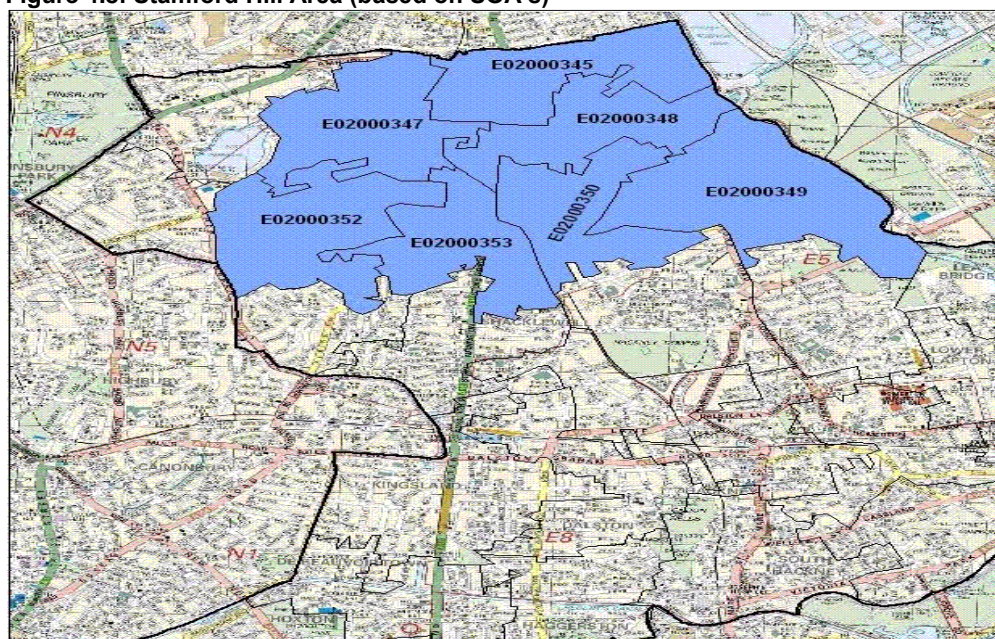
Summary & Recommendations

4.18 Due to the limited amount of data available in relation to out of school places (in particular morning provision); an assessment of the sufficiency of provision is inconclusive. Breakfast club provision is not currently recorded centrally, therefore at present we are only able to understand half of the potential out of school provision that is available. It may be prudent to explore if there is value in this provision being monitored and co-ordinated alongside the after-school club provision to provide a better understanding of out of school provision.

Research Question 3: Explore if there been an increase in birth rates in the Stoke Newington and Stamford Hill areas compared to the rest of the borough / rest of the country and what is the impact of this on childcare places?

4.19 Stamford Hill, unlike Stoke Newington, is not a ward and therefore has been defined by Super Output Areas (SOA's). This area has been informed by NHS City and Hackney's current work on an Orthodox Jewish Needs Assessment.⁵

Figure 4.8: Stamford Hill Area (based on SOA's)



Source: NHS City and Hackney

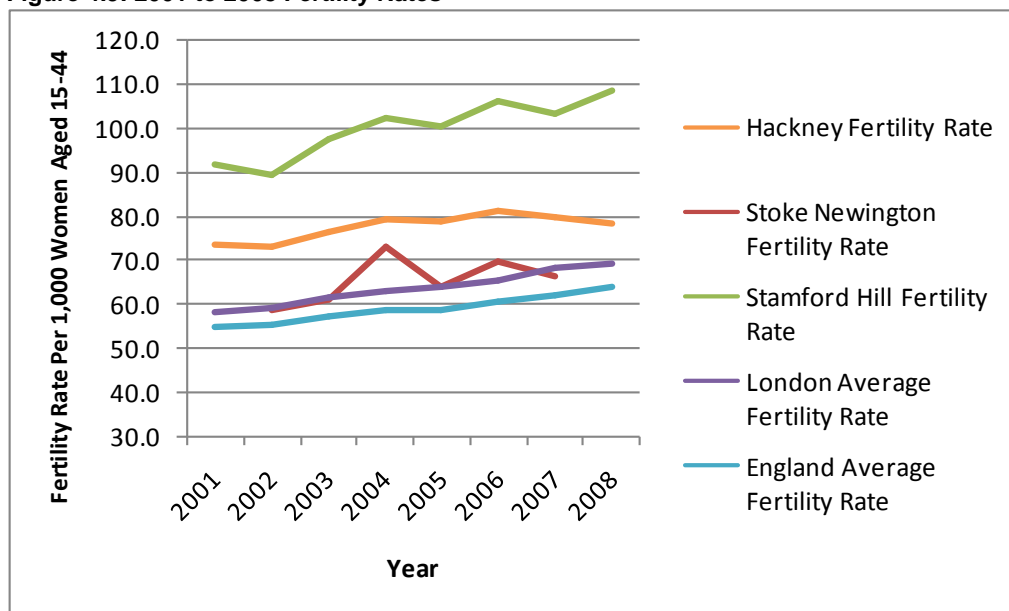
4.20 The number of births has increased across the UK since 2001 (see Figure 4.9) and in London there has been an increase of 18%, from 104,000 in 2001-02 to 123,000 in 2006-07⁶. Birth rates have increased most rapidly for women in their thirties and forties, as women have tended to delay having children until they have established their careers and can afford a suitable home. In 2008, the

⁵ The Stamford Hill area comprises of the following SOA's: E02000345, E02000347, E02000348, E02000349, E02000350, E02000352 and E02000353

⁶ London's Changing Population GLA Demography Update 16, October 2008

overall birth rate in London was 69.3 per thousand women aged 15 to 44, compared with 63.9 per thousand in England and Wales⁷. The rate was lower in London for all age groups below 35, including for those in their teens, but higher for women aged 35 and over.

Figure 4.9: 2001 to 2008 Fertility Rates



Source: NHS City and Hackney

4.21 Hackney as a borough has a high General Fertility Rate (GFR)⁸, this number is represented as number of births per 1,000 people and as you can see from Figure 4.9, the fertility rate for Hackney as a whole remains consistently above the London and England averages. However, the Hackney average in 2008 was 78.5, slightly narrowing the gap between the regional and England averages. In stark contrast to this the birth rate for the Stamford Hill area continues to grow rapidly, increasing the gap between the borough, region and England averages.

4.22 Within Hackney there are some areas that clearly have a higher GFR, interestingly the top four wards (table 4.3): Springfield (113.3), New River (112.8), Lordship (106.3) and Cazenove (105.7) comprise part of the Stamford Hill area. Stoke Newington also comprises part of this area, yet it has a relatively low GFR in comparison to the rest of the borough averaging 65.5 between 2002 and 2007, with minimal variance or growth year on year.

⁷ Birth Statistics: Review of the National Statistician on births and patterns of family building in England and Wales, 2007, Series FM1 No. 36, ONS

⁸ The formula for calculating this is: (Number of live births / Women aged 15-44) * 1000

Table 4.3: Average Birth and Fertility Rates for Hackney by ward

	Average annual Live Births (2002-07)	Average annual General Fertility Rate (2002-07) per 1,000 females aged 15 - 44	Birth Rate Rank Order
Brownswood	196.8	66.4	14
Cazenove	332.7	105.7	4
Chatham	259.0	83.1	5
Clissold	204.2	61.0	19
Dalston	212.2	67.8	13
De Beauvoir	175.8	64.4	17
Hackney Central	212.8	75.0	7
Hackney Downs	224.7	73.9	8
Haggerston	190.7	63.1	18
Hoxton	188.2	65.7	15
King's Park	200.0	73.5	9
Leabridge	221.0	76.5	6
Lordship	290.5	106.3	3
New River	310.0	112.8	2
Queensbridge	197.5	73.1	11
Springfield	306.5	113.3	1
Stoke Newington Central	204.3	65.5	16
Victoria	227.7	69.6	12
Wick	191.7	73.4	10
HACKNEY AVERAGE	228.7	78.4	

Source: NHS City and Hackney

4.23 The Charedi (Orthodox Jewish) community is predominately based within the Stamford Hill area of the borough. According to the publication *Torah, worship and acts of loving kindness*⁹ the average family size is 5.9 compared to 2.5 in Hackney and 2.4 in England and Wales, and 53% of families have four or more resident children under the age of 16. As demonstrated in Figure 4.9, the birth rates within the Stamford Hill area have steadily increased between 2001 (91.7) and 2008 (108.6), representing a 11.7% increase in the birth rate within this community.

⁹ Holman & Holman, *Torah, worship and acts of loving kindness: baseline indicators for the Charedi community in Stamford Hill*, November 2002

Table 4.4: Birth rates for Stamford Hill Area (based on SOA's)

Year	Female Population Aged 15-44	Live Births	Fertility Rate
2001	14,950	1371	91.7
2002	14,533	1298	89.3
2003	14,252	1390	97.5
2004	14,088	1443	102.4
2005	14,097	1413	100.2
2006	14,252	1511	106.0
2007	14,270	1475	103.4
2008	14,295	1552	108.6

Source: NHS City and Hackney

Summary & Recommendations

4.24 With the current stabilisation of overall birth rates in Hackney it is unlikely that there will be a significant increase in overall demand for childcare. In Stamford Hill, which includes Stoke Newington, there continues to be a sharp increase in birth rates. This is likely to manifest itself as an increase in demand for childcare places for 0 to 2 year old provision within these areas. However, as the Stamford Hill area is home to the Orthodox Jewish community the likely impact of this upward trend is an increase in demand for 3 to 4 year old places as this is the trend in take-up of childcare within this community. In light of this it would be prudent to continue to monitor demand in those wards and/or planning areas that comprise the Stamford Hill area.

Research Question 4: Has the take up of tax credits improved since the original childcare sufficiency assessment?

4.25 Child Tax Credit is for people who are responsible for at least one child or qualifying young person and is paid direct to the person who is mainly responsible for caring for the child or children. Working Tax Credit is for people who are employed or self-employed (either on their own or in a partnership), on lower incomes working at least 16 hours a week and are paid for that work. As part of Working Tax Credit the individual may qualify for help towards the costs of childcare. If you receive the childcare element of Working Tax Credit, this will be paid direct to the person who is mainly responsible for caring for the child or children, alongside payments of Child Tax Credit.

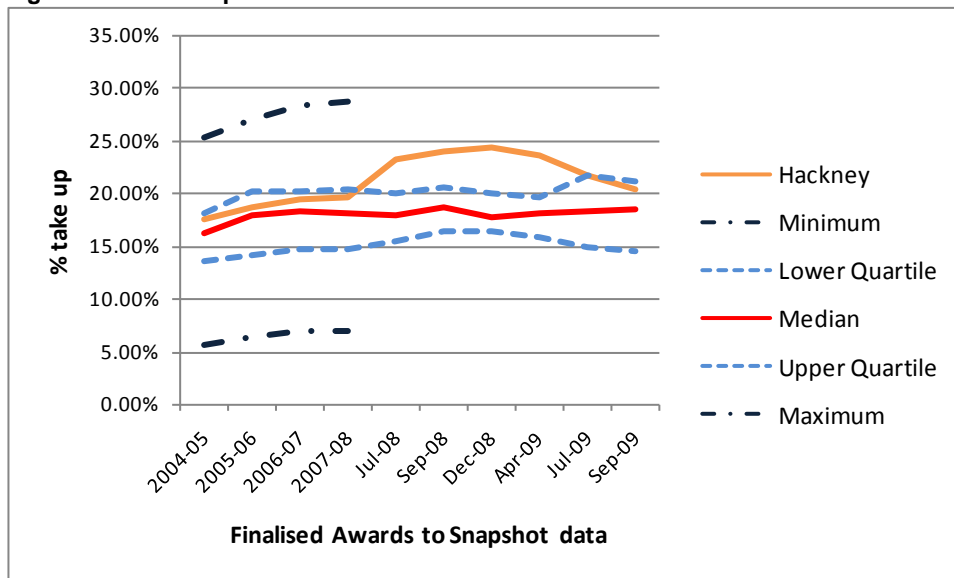
4.26 In spite of its very high rates of child poverty, London has the lowest take-up rates of child and working tax credits in the country. In 2005/06, it was estimated that 64 per cent of entitled families with children in London received

tax credits in comparison with the UK average of 79 per cent¹⁰.

4.27 Upon review of nationally available data for tax credits, we found that this information was only available up to the period that the full childcare sufficiency assessment was conducted. In order to provide a more up-to-date picture of trend and take-up we have undertaken analysis using snapshot data from NI118: take up of formal childcare by low-income working families. Figure 4.10 shows the number of working families benefiting from the childcare element of Working Tax Credit (WTC) as a percentage of the number of working families receiving more than the family element of Child Tax Credit (CTC). This information has two composite parts to it; data 2004 – 2005 up to 2007 – 2008 represents finalised awards for take up, whereas the data July 08 to September 09 represents snapshot data and therefore is not as accurate as the finalised awards.

4.28 As you can see from Figure 4.10, Hackney has consistently remained above the median uptake figures for the London Borough's. In 2007 – 2008, the local uptake figure was 19.56%. However, in the snapshot data between July 08 and July 09 we see a large increase taking the area well into the upper quartile, peaking December 08 at 24.47%. The latest snapshot data available places the uptake at 20.41% representing a 4% decrease in a short period of time.

Figure 4.10: Take up of tax credits



Source: The Learning Trust, based on NI118

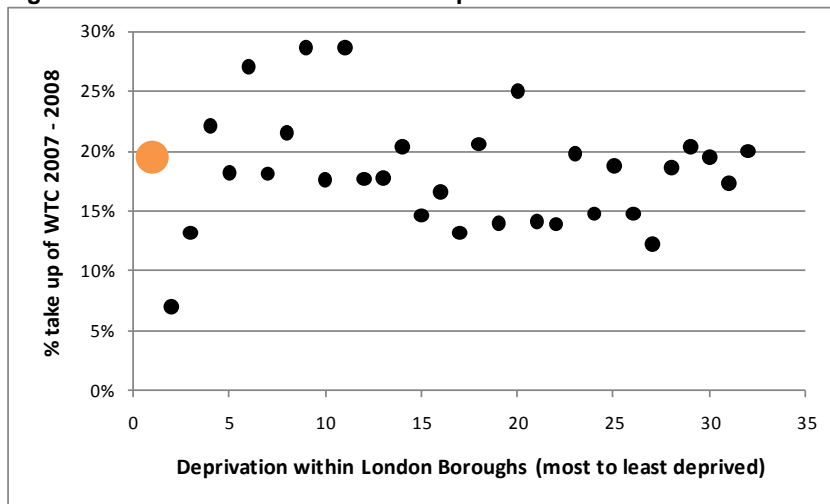
4.29 Despite a decline in Hackney of the take up of the tax credits towards the end of 2009, the 20.41% figure for September 2009 remains higher than the England average of 18.61%. However, it is important to note that the snapshot data from July 2008 and are not finalised awards, therefore there could be

¹⁰ HMRC estimates available from www.hmrc.gov.uk/stats/personal-tax-credits/cwtc-takeup.htm

some discrepancies. Interestingly Hackney’s snapshot projection (starting in July 2008) is where the gap opens between the area and the median. If we use the finalise awards (2004 to July 2008) we see that Hackney has experienced a slight increase in uptake and remains similar to the London average.

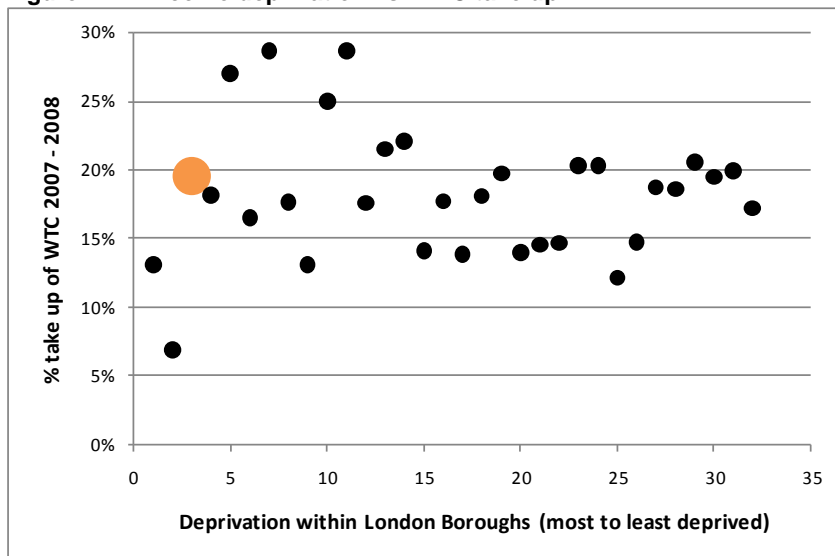
4.30 Deprivation within Hackney is high; therefore, despite being close to the average take-up figure for London, the uptake is probably not proportionate to the economic context of the area. Figure 4.11 shows the overall Index of Multiple Deprivation (IMD) 2007 ranking the London Borough’s 1 to 32 according to the level of deprivation. As you can see from this graph, Hackney is the most deprived borough in London. Similarly, Figure 4.12 shows that Hackney is the 3rd most deprived borough in London on income measures, yet for the same period the uptake remains similar to less deprived areas.

Figure 4.11: Overall IMD vs. WTC take up



Source: The Learning Trust and the IMD 2007 Rankings

Figure 4.12: Income deprivation vs. WTC take up



Source: The Learning Trust and the IMD 2007 Rankings

- 4.31** Data from the London Health Observatory 2007, suggests that 52.7% of under 16's live in low income houses within Hackney. Those counted as living in poverty are children under 16 living in families receiving Income Support or Jobseekers Allowance (Income Based), or in families receiving Working Families Tax Credit/Disabled Persons Tax Credit whose equivalent income is below 60% of median before housing costs. This figure places Hackney second within the London Borough's, Tower Hamlets being first with 66.5%.
- 4.32** Using the parental questionnaire responses as a sample of the population, there was 46% of families who have started receiving tax credits in the last 12 months with an additional 16% already in receipt of them. Of the 38% that do not currently receive them, the major reason for this was due to ineligibility, however, 10 respondents identified that they were not aware of them and 36 felt that there was not enough information. One parent identified that the paperwork and processes to claim tax credits have been complicated to the extent that they have withdrew from claiming. There were several comments that identified the importance of tax credits: *'Cost is high for those just outside the threshold for tax credits'* (Hackney resident); *'Without working credits I simply would not be able to send my child to nursery.'* (Hackney residents).
- 4.33** For those parents not eligible for the childcare element of Working Tax Credit, employer-supported childcare may be available, which can lead to savings of up to £1,196 for higher rate tax payers and £943 for lower rate tax payers. The government had planned to phase out employer supported childcare, but due to the strength of response from working parents, the scheme will remain in place, but will be capped at 20% tax relief. HMRC and the London Development Agency are also running Childcare Affordability Programme pilots to test ways of making tax credits work more effectively.
- 4.34** As part of the governments initiative to increase the number of free early education places for 3- and 4-year-olds (nursery education fund) from 12.5 hours to 15 hours, Hackney was one of a handful of pathfinders who extended the provision early (from summer 2008). This increased and flexible provision for 3 to 4 year olds has been very well received by parents. For example, summer 2005 to spring 2008 had an average of 1,256 children aged 3 accessing the 12.5 hours from PVI providers, however when the 15 hours was introduced in summer 2008, the period up to autumn 2009 saw a 17% increase, an average of 1,519. This increase has also benefitted more disadvantaged groups such as the Orthodox Community, where children are more likely to stay in childcare up to the term of their fifth birthday, there has been a 19.5% increase post the introduction of the 15 hours. It is important to note the high level of birth rates may account for this increase, similarly there may be an increase in individuals from this community, currently resident in neighbouring Haringey, utilising this resource.

Summary & Recommendations

- 4.35** In light of the limited amount of data available and the accuracy of projections of take-up past July 2008, it is difficult to make an assessment as to whether the take-up of tax credits has improved since the original childcare sufficiency assessment was conducted. Projections of the number of families benefiting from WTC suggest an overall upwards trend up to April 2009. Furthermore, 46% of parental responses identified that they have started receiving tax credits over the last 12 months, with only a limited number identifying that they were not aware of them. However, despite these positive trends it is not possible to conclusively state that the take up has increased over this period.
- 4.36** Between October 2009 and February 2010, the Family Information Service (FIS) received 531 enquiries regarding childcare and as part of their policy each individual enquiry was asked if they would like information on working tax credit and nursery educational funding for children aged 3 to 5. In light of some of the comments around complexity and lack of information it may be worth following up with individuals to assess levels of uptake and to understand processes that may be acting as barriers to parents and guardians.

Research Question 5: Has the recession had an impact on the childcare arrangement of families and if so, what strategies could The Learning Trust adopt to support families and childcare providers?

- 4.37** As in previous years, the childcare market has endured the typical opening and closing of providers; an expected trend given the small nature of many childcare providers. Generally, the childcare market seems to have held up well in the recession, possibly as parents stay in work for financial necessity. Research conducted in March 2009 within London provided some anecdotal evidence of mothers returning to work earlier than planned after having a baby or looking for work to supplement income and therefore an increased demand for childcare¹¹.
- 4.38** The NOMIS labour market profile for Hackney estimates that 75.8% of the working age population were economically active during the period of July 2008 to June 2009¹². This figure is 0.3% better than the London average, and 2.9% below the Great Britain average of 78.9%.

¹¹ Clark, J., Latter, J., Pereira, I., Leary, K., and Mludzinski, T & Ipsos Mori (March 2009) The economic downturn – the concerns and experiences of women and families: Qualitative and quantitative research main report Government Equalities Office: London

¹² Labour Market Profile for Hackney, NOMIS, available from: www.nomisweb.co.uk

- 4.39** According to a recent study ‘*Why are there so few part-time jobs in London?*’ conducted by GLA, women in London are much less likely to work part-time in London than in the rest of the UK. In 2007/08, 31% of women in employment in London worked part-time compared with 42% in the rest of the UK. For men, part-time rates are slightly higher in London, at 11% compared with nine per cent in the rest of the UK. Overall a quarter of jobs in London are part-time, compared to nearly a third in Great Britain as a whole. The study found that the difference in the industrial and occupational make-up of London and the size of companies was only a small part of the explanation¹³. This high level of full-time employment increases the demand for full-time childcare places; similarly it increases the risk to the market if employment levels fall.
- 4.40** Alongside the potential impact of the recession on jobs and childcare arrangements, there is also the issue of disparity of earnings between Hackney and London as a whole, as can be seen in Table 4.5¹⁴. This correlates to a number of parents who identified that the recession has not made the affordability of childcare anymore of an issue than it already was.
- 4.41** Average earnings are higher in London than the rest of the country; however, in Hackney there is a variance of 4.28% against the London average for gross weekly pay, which has an impact as people feel the effect of the economic down-turn, increased cost of living and the already high cost of childcare within the city.

Table 4.5: Earnings by Residence 2009

	Great Britain	London	Hackney	Variance +/- to London
Gross Weekly Pay (full-time workers)	£491.0	£598.60	£573.0	-4.28%
Hourly Pay (full-time workers)	£12.47	£15.60	£14.63	-6.22%

Source: NOMIS

- 4.42** The Childcare costs survey 2010¹⁵ found that nursery and childminder costs have risen significantly throughout the country. As in previous years, London and the South East had the highest childcare costs overall (see Figure 4.13). Average nursery costs for a child under two are now £226 in Inner London and £192 in Outer London, compared with an England average of £167. The cost in Outer London is higher than in any other region¹⁶. Parents in London are paying the highest reported costs, and can expect to pay as much as £11,050 per year for 25 hours childcare per week, or £22,100 for 50 hours per week.

¹³ Why are there so few part-time jobs in London? Current Issue Note 12, GLA Economics, 2007.

¹⁴ Labour Market Profile for Hackney, NOMIS, available from: www.nomisweb.co.uk

¹⁵ *Childcare Costs Survey 2010*, The Daycare Trust

¹⁶ Childcare costs survey, Daycare Trust, January 2009, available from: www.daycaretrust.org.uk

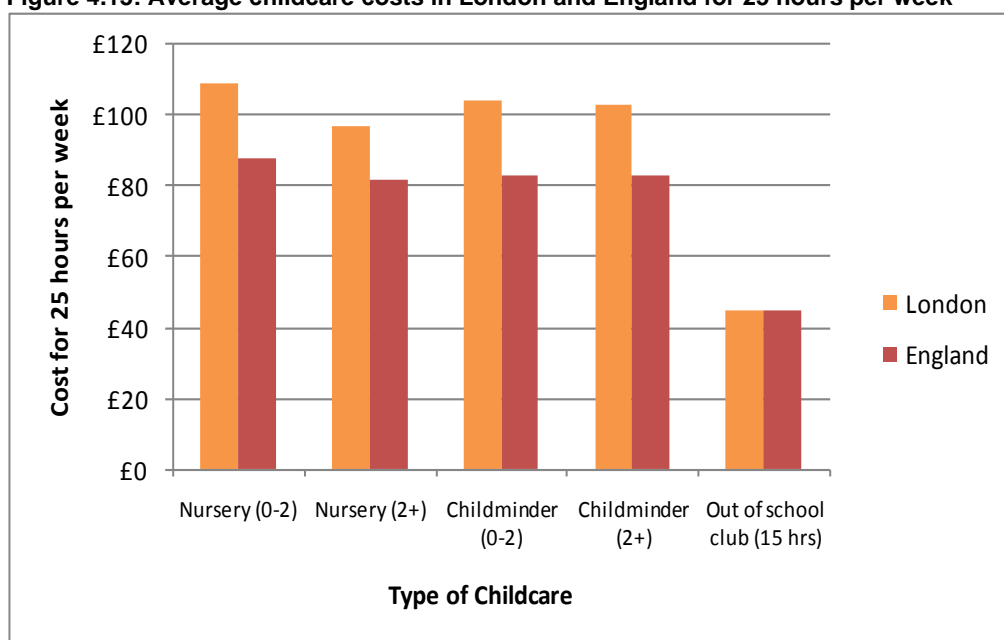
4.43 The costs for all forms of childcare in England have increased at a rate above inflation (2.9%)¹⁷, as can be seen in Table 4.6.

Table 4.6: Average increases in childcare cost for England above the rate of inflation (based on Consumer Price Index, December 2009)

Nursery (0 to 2 yrs)	Nursery (2+ yrs)	Childminder (0 to 2 yrs)	Childminder (2+ yrs)	Out of school club
+4.8%	+5.1%	+6.4%	+9.2%	+12.5%

Source: Childcare Costs Survey 2010, The Daycare Trust

Figure 4.13: Average childcare costs in London and England for 25 hours per week



Source: Childcare Costs Survey 2010, The Daycare Trust

4.44 Despite parents in London and the South East still experiencing the highest childcare costs, it must be acknowledged that nursery costs in these regions have stabilised somewhat; increasing by just 12p per hour for a nursery place for a child aged 2 and over in London. This has contributed to a narrowing of regional cost disparities.

4.45 The most recent information around the cost of provision for Hackney is dated 2008 and the method by which the data is calculated differs from that of The Daycare Trust so is not comparable. However, if we look at the ranges of fees paid by respondents (Table 4.7) then we get an idea of how the cost compares to local salaries.

¹⁷ Childcare Costs Survey 2010, The Daycare Trust

Table 4.7: Parental childcare spend per week

Childcare spend (per week)	Percentage of respondents
Up to £50	40.1%
£50 to £100	17.9%
£100 to £200	32.4%
£200+	9.6%

Source: 2010 CSA Refresh Parental Questionnaire

4.46 Assuming that the average weekly pay of a full-time worker is £573, the average spend per week (based on 2 adults in a household) is just over 20% of household income. This correlates with the responses given by parents of how much of their household income is spent on childcare. Around 57% of respondents stated that their childcare costs represented up to 20% of their household income and 20% said that the cost represented around 25 to 30% of the household income. Clearly childcare represents a significant proportion of families spend and this does not take account of single parent households or those on income lower than the average. The following parental comments help to articulate this:

'We feel child care services are very expensive for middle income working families. Tax credits pay next to nothing and free child care for 3-5 year olds is poor.' **Hackney Resident**

'Cost is extremely high once outside of Government subsidy.' **Hackney Resident**

'Due to recession parents are finding it difficult to afford full childcare costs...' **Hackney Resident**

'As a single parent most childcare and day nurseries are too expensive. Even with help and mums are being encouraged to go back to work, most can only do part time so incomes are very low.' **Hackney Resident**

4.47 The parental responses to statements around the recession and financial impact are interesting. In response to the statement: 'the recession has had an impact on our household income' 65% either strongly agreed or agreed. However, when asked to comment on the statement: 'this financial impact has or is likely to impact on our childcare usage' only 50% either strongly agreed or agreed, whereas 42% disagreed with the statement. This is supported by several parental comments in which parents articulated that despite the struggle to meet costs, continuity within the child's life was important. Interestingly, 56% of providers either strongly agreed or agreed that they are seeing a decline in demand due to the economic situation and people opting for alternative provision.

- 4.48** Discussions with the Business Support Officer within The Learning Trust identified that the most notable impact of the recession on childcare arrangements is parents reducing their hours or removing their child from a setting because of redundancies or cut backs in employment and hours. Area C has a significant number of registered childcare places of which a large proportion are provided by small settings who face the greatest exposure to reduction in occupancy. An example of the impact of the recession on parents' use of childcare can be found in Area E, where a setting has quite affordable fees, but has experienced a drop in occupancy due to people moving out of the area because of the cost of living. There are some good examples of how these smaller providers have counteracted this risk, for example, a small provider in Area C managed to get its 12 places filled through aggressive marketing and greater flexibility of provision.
- 4.49** At present, some children's centres are working at high levels of occupancy with children on the waiting list, but local PVI providers, who have similar prices have capacity. For example, one setting has 14 places and is not at full occupancy, yet the local children's centre is extremely busy, this issue may be attributed to type of service (rather than cost which is similar) as it is a parental co-operative and parents are encouraged to actively contribute which may not suit people's busy lifestyles and working commitments. The Business Support Officer has spoken to the setting about this model and how changes may help to stop parents from being excluded. It is highly likely that this type of adaptation and support to change and develop processes will help to support parents and providers through a challenging and un-settling period.
- 4.50** Childcare costs in Britain are high, with parents paying a large proportion of the costs. The Government provides several types of funding to reduce the amount that parents have to pay. Some families can claim up to 80 per cent of childcare costs through the childcare element of Working Tax Credit, although not all parents claim their full entitlement. The Learning Trust has increased the marketing of these opportunities. For example, between October 2009 and February 2010 the FIS received 531 enquiries and as part of their policy each enquiry is asked if they would like information on tax credits and nursery educational funding for children aged 3 to 5, if applicable. Continuing this marketing approach alongside greater marketing and co-ordination of vacancies will be beneficial to both providers and parents. Around 60% of parents agreed with the statement that information was readily available on childcare options, however, 22% of parental responses disagreed with the statement and 71% of provider responses believe that there needs to be greater marketing of childcare within Hackney.

Summary & Recommendations

4.51 The recession, to some extent, has impacted (either positively or negatively) upon the day-to-day living of most families and in some cases on their childcare arrangements. Rises in the cost of provision coupled with redundancies have had an effect on some families and this is hard to measure. Interestingly, parental responses to the questionnaire were equally split as to whether this recession has or is likely to change their childcare arrangements. Whilst people remain in employment, childcare arrangements are unlikely to change, though affordability will remain issue with a large proportion of respondents spending up to 30% of their household income on childcare, coupled with below London average for earnings.

4.52 With the impact of the recession yet to be fully realised it is difficult to make an assessment on how employment figures may change. This is further exacerbated by the composition of the workforce, with major professions being: managers and senior officials (17.4%), professional occupations (19.4%), and associate professional and technical (22.7%). As proposed public sector cuts have yet to manifest themselves in redundancies, we cannot be sure what effect this will have on these individuals. In contrast to this the 2012 Olympics look like they will increase job opportunities for individuals predominately outside of these three occupations. Hackney would benefit from increased and sustained marketing of affordable childcare places to help ease problems associated with affordability, whilst closely monitoring the employment situation over the next six to twelve months.

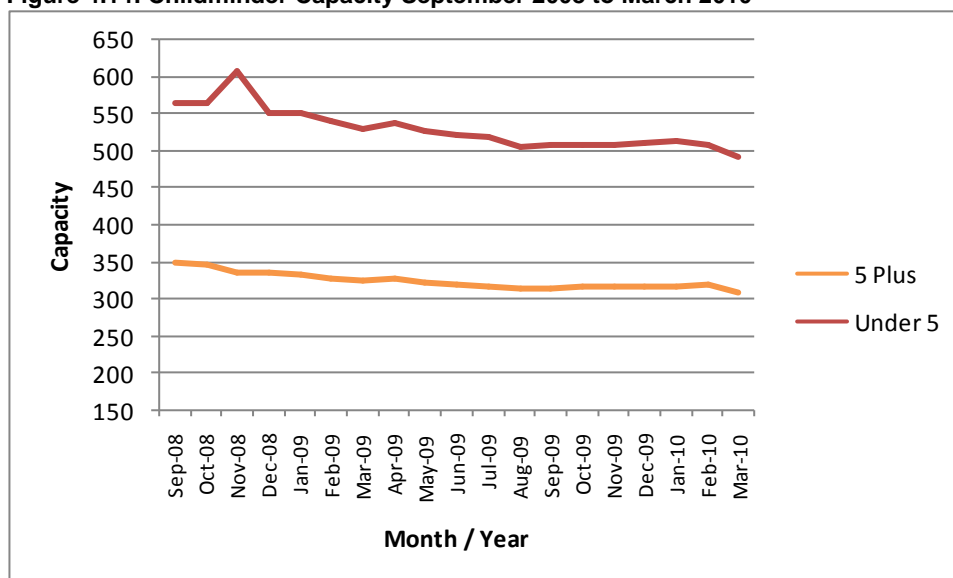
Research Question 6: Has the uptake of childminder places changed since the previous refresh and, if so, in which age groups?

4.53 There is a system for collection of data on vacancies, however, the data is limited and previous response levels from providers have been very low. Childminders are self employed and therefore do not have to provide vacancy levels like other settings do, also a childminder may have capacity for 5 people on the Ofsted register, however, they may opt only to provide places for 4 or they may wish to remain registered but not have any children on their books.

4.54 In terms of the number of places available within the borough there has been a decline in capacity from September 2008 levels to March 2010 of 12% in the over 5's childminder capacity and 13% in the under 5's¹⁸. In real terms there are now 73 places less for under 5's and 41 for children aged 5 and above compared to just over a year ago.

¹⁸ Children under 5 and children 5 plus is how the data is currently segmented and recorded.

Figure 4.14: Childminder Capacity September 2008 to March 2010



Source: The Learning Trust

4.55 Between January 2009 and March 2010 Areas C and E have seen a decline in the number of childminder places, whereas there has been growth within Areas B, D and F. As can be seen in Table 4.8, Area A continues to have the highest capacity and has seen minimal change over this period.

Table 4.8: Childminder Capacity September 2008 to March 2010 by age groups

	January 2009			March 2010		
	Under 5's	5 or over	Total	Under 5's	5 or over	Total
Area A	92	57	149	93	54	147
Area B	64	44	107	71	53	108
Area C	100	52	152	90	48	152
Area D	81	54	135	86	57	135
Area E	83	59	142	75	46	142
Area F	64	37	101	76	50	101

Source: The Learning Trust

4.56 As we can see the current capacity in childminder provision for children under the age of 5 is higher in each of the areas in comparison to the over 5's provision. There is also not a great deal of disparity between the distribution of this provision. Area A has the largest capacity for 0 to 5 year olds and this is to be expected considering Area A includes New River and Lordship wards, which are two of the most densely populated areas in the borough for this age range. What is interesting is that Area B has the lowest capacity, yet it is composed of Springfield and Cazenove, which are also densely populated with this age range.

4.57 Within the provider responses there appears to be some disparity between the number of places and vacancies. In a number of the questionnaires the number of places was not provided and the vacancies box did not provide a number. Therefore, all we can infer from this data is that there is some capacity within the market, but the figure is unclear. Interestingly, 50% of providers have perceived a decrease in demand, whilst 29% perceive that it has been stable over the last 12 months. Only 21% experienced a rise in demand and this has predominately been within the 0 to 2 year old provision. The vast majority of those who did experience an increase in demand identified that they were unable to meet this increase. Given the size and nature of this provision this is to be expected as expansion is very difficult and providers tend to have small numbers of places.

Summary & Recommendations

4.58 Due to the limited amount of data held on vacancies, an assessment of current uptake is inconclusive. However, we can see that capacity has slightly declined over the last 18 months. When we look at the data collected within Research Question 11, we can see that there has been a slight increase in the number of enquiries received by the childminder network co-ordinators, but it is unclear if this has manifested itself as an increase in uptake.

4.59 It may be prudent for The Learning Trust to assess the value of undertaking some further engagement work with childminder providers, possibly on a one-to-one basis to better understand the current level of vacancies.

Research Question 7: Have rental increases had an effect on sustainability of childcare places, particularly on private, voluntary and independent (PVI) providers?

4.60 Hackney currently has a number of providers from the private, voluntary or independent (PVI) childcare sectors, and these providers vary in size, therefore, have different levels of exposure to increased rental and overhead costs.

4.61 In September 2009 The Learning Trust's Business Support function undertook an exercise to obtain information on the current rental prices. This data had not been collected prior to this activity therefore the information was to act as a benchmark for repeated surveys. The return rate and quality of the data from this survey was minimal. However, a discussion with the Business Support Officer and analysis of the data provided has produced some insight:

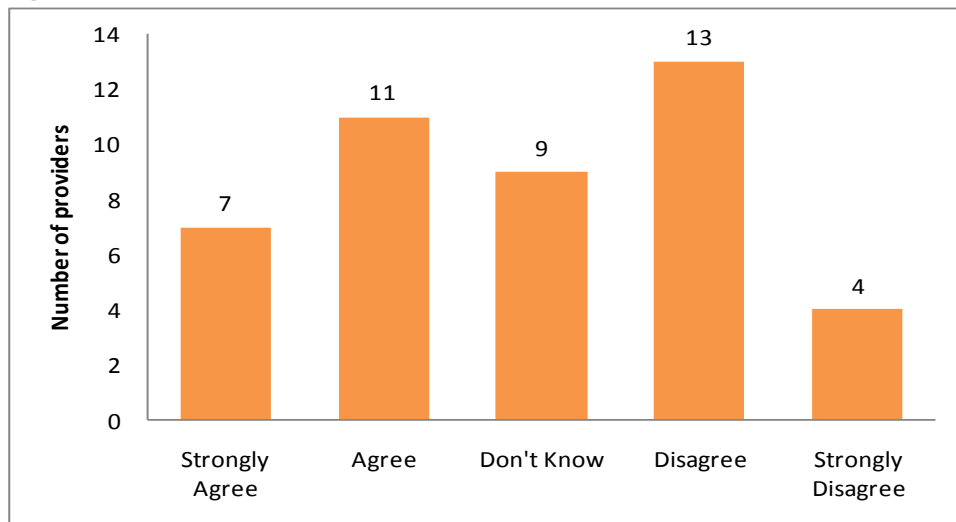
- Firstly, from the limited data collected during this process we can see that there are substantial variances in rental charges across organisations. For

example, from the data available, the top 3 rent amounts were as follows: £23,061 (a setting for 100 children representing £230 per head); £15,104 (a setting for 41 children representing £368 per head); and £9,000 (a setting for 38 children representing £236 per head).

- Secondly, the frequency with which the respondents stated that their rent was reviewed varied from 6 months to annually to every 5 years.
- Thirdly, discussions with a number of playgroups based within Tenants and Resident Association facilities have identified that where they have not paid rent for the facility previously they are now being asked to contribute and pay rent, one figure quoted was £5,000, which will jeopardise the sustainability of this service.

4.62 Overall there was a balanced view from providers to the statement: ‘we are experiencing increased rental costs which are effecting our services’ (Figure 4.15). As discussed, the work undertaken by the Business Support Officer revealed that in a number of cases information on rental charges was unknown. As can be seen in Figure 4.15, 9 providers did not know if they were experiencing increased rental costs. This poses a threat to the sustainability of providers as increased rental charges will inevitably be deferred to the customer and will require advanced planning given the current issues with cost, or can possibly lead to the service operating at a deficit.

Figure 4.15: Provider response to increased rental costs



Source: 2010 CSA Refresh Provider Questionnaire

4.63 Provider responses as to whether increases to rental costs would affect the sustainability of their service were equally as mixed, with 35% agreeing that increases would affect sustainability and 36% disagreeing. However, in excess of 72% of providers did agree that increases in childcare fees (possibly as a result of increased rental charges) would result in their customers seeking alternative provision.

- 4.64** The Business Support function within The Learning Trust has a remit to support providers who are struggling and where it is deemed that these providers have a good or outstanding grading from Ofsted and deliver a much needed service. This support may take the form of short term sustainability grants to help pay for overheads and this would accompanied with action plans to support the setting to recover. This level of support focuses on intervention and occurs when the problem has become serious; however, due to the current economic situation the likelihood of more settings needing this support at a time when budgets are shrinking is great. Other types of support also include business skills training sessions, support, advice and guidance. However, it is important to note that the Business Support Officer has seen a decline in the numbers of people taking up and attending these sessions.
- 4.65** One provider identified that the addition of NEF for 2 year olds would help all playgroups and settings with sustainability and uptake of places as parents in this borough find it hard to pay fees for 2 year olds, yet uptake for 3 and 4 year olds is high due to this assistance.
- 4.66** Business Support has had a number of enquiries about potential providers entering the market (38 people October to December 2009), however, it is likely that only one of these would turn into a new provider because of the barriers to entry of the market, namely: cost and suitability of premises, planning permission, suitably qualified staff and there is no LA funding grants for start up.

Summary & Recommendations

- 4.67** As in previous years, the childcare market has endured the typical opening and closing of providers; an expected trend given the small nature of many childcare providers and the current economic situation. Generally, the childcare market seems to have held up well in the recession. Overall providers gave a relatively balanced view on experience of increased rental costs effecting provision and sustainability. However, in a number of instances providers were not aware of increased rental costs and in these cases sustainability may be affected with further economic downturn.
- 4.68** Business Support function should continue to source information on rental prices from the PVI providers in light of the lack of information and current levels of disparity. It would also be prudent to further develop and encourage providers to partake in business skills courses.

Research Question 8: Are there sufficient childcare places available to the Orthodox Jewish community within Hackney?

4.69 The Charedi community sometimes referred to as the Orthodox Jewish community, has been a highly visible but self-contained presence in Stamford Hill (as defined in section 4.16) for over 75 years. The Charedi community are dependent on local infrastructure such as kosher shops, synagogues and schools and therefore tend to be clustered around these local structures, particularly the synagogues. Charedi life is based around the family and people aspire to have large families, hence the above average birth rates for this area.

4.70 Contrary to the trend in most communities, wealthy members of this community choose to live alongside their more deprived neighbours rather than move to a more expensive area because of the religious and cultural infrastructure they currently enjoy. Therefore, this affluence can mask areas of deprivation and low income. The cost of living within the Charedi community is high, children are educated in community schools which are not state maintained, and therefore parents pay school fees, although these fees are kept low because of levels of deprivation. Nevertheless some parents could be paying for 6 or 7 children at a time.

4.71 Research conducted by The Interlink Foundation in June 2009 estimates that there are 2,903 households (87%) of the Charedi community within the Hackney area, with the remaining 13% located in neighbouring Haringey. In Hackney and Haringey the growth rate of the Charedi community is 4.5%¹⁹ and the average Orthodox Jewish household in 2002 was 5.9 compared to a national figure of 2.2 and the borough wide figure of 2.4. Based on an average household size of 5.9 the population size is estimated at 18,000, however, as the household size has also been estimated at 6.3 this population size could be as large as 19,200. This research also suggests that of the 49,880 Hackney children, Charedi children represent 20%.

4.72 Childcare is important to the Charedi community for a number of reasons and women going back into employment is an important driver but not the only one. Many mothers may choose not to work because they are raising a large family. Overcrowding and deprivation are common in the Charedi community and Hackney statistics show that the wards in the north of the borough where Charedi people live are some of the most overcrowded in Hackney. This is a strong driver for people to send their children to nursery at a young age. Families also very often do not have the resources to stimulate their children in their home which are available in childcare settings.

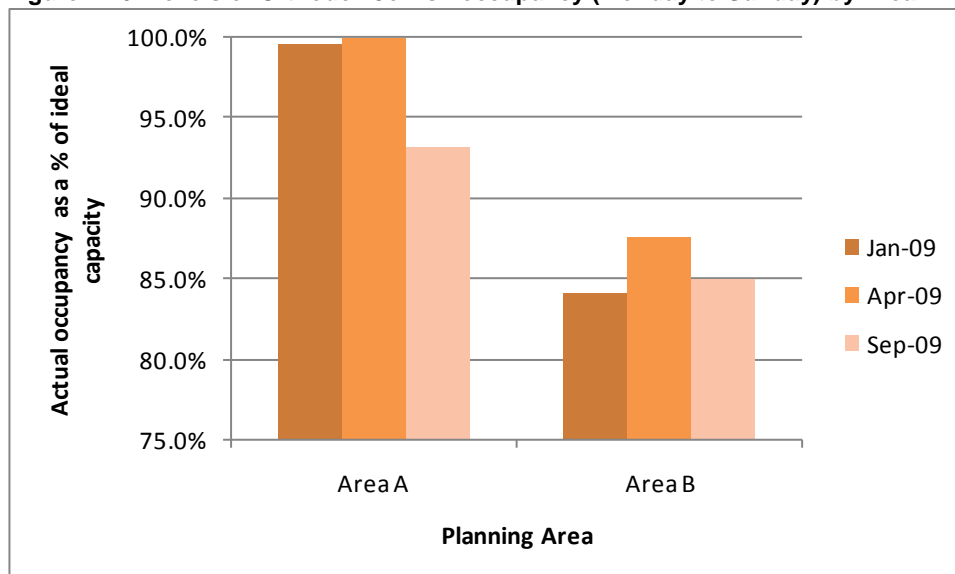
¹⁹ Holman & Holman, *Torah, worship and acts of loving kindness: baseline indicators for the Charedi community in Stamford Hill*, November 2002

4.73 There are 19 providers of nursery care for the Orthodox Jewish community, one of which was opened in the second half of 2009, bringing 30 new places for children aged 3 to 5 years of age. This provision in the borough is made up of mainly private and registered independent school provision. As per section 4.3 we have focused on snapshot data collected by The Learning Trust in January, April and September 2009 to identify the number of places. As of September 2009 there were 1,590 Orthodox Jewish places available.

4.74 The pattern for age of first attendance at nursery has remained remarkably constant. According to *Torah, worship and acts of loving kindness* over 85% of children start nursery between their third and fourth birthdays. This is consistent with the low capacity levels across both areas for 0 to 2 year olds, this also correlates with the high level nursery education funding within PVI's for 3 to 4 year olds within the area.

4.75 As with the provision for children aged 0 to 2, there appears to be some disparity between the number of places available (1,590) and the estimated population, which is not segmented to 0 – 5 years of age but is likely to be high given the total number of children and the high birth rates within the community. However, if we look at the occupancy levels we get a better idea of if there is sufficiency within the market. In order to calculate the occupancy levels we have used the actual occupancy as a percentage of the ideal capacity and this covers the full week's provision.

Figure 4.16: Levels of Orthodox Jewish occupancy (Monday to Sunday) by Area

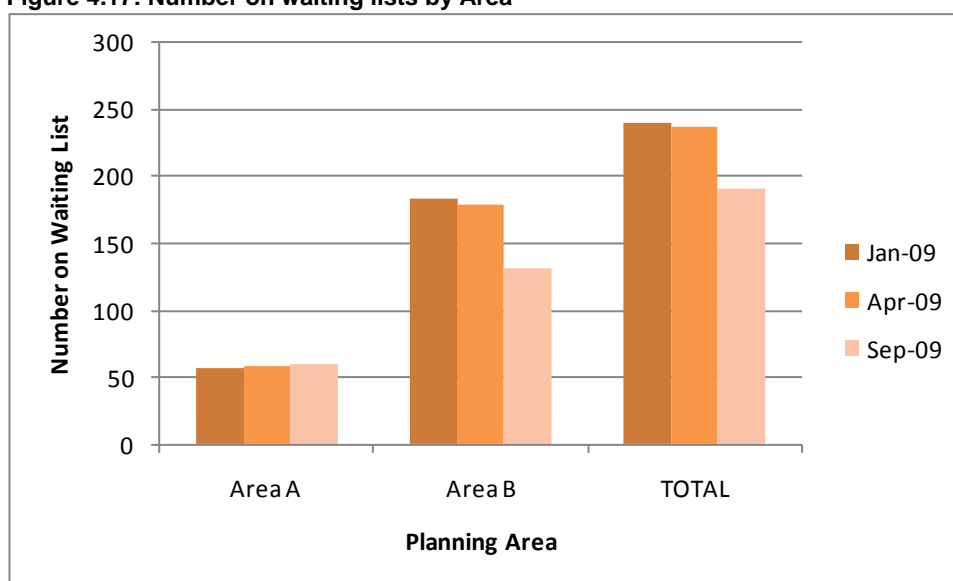


Source: The Learning Trust

4.76 As we can see from Figure 4.16, Area A has had very high levels of occupancy up to September 2009, where the occupancy level drops to 93%. This may be attributed to the introduction of a new setting within the area and the creation of

87 additional places. In contrast to this, Area B has lower levels of occupancy, averaging at 85%. It is important to note that the scale of the provision in these areas differs greatly and may account for this disparity. Area has capacity for 351 children, whereas Area B has 1,239 places. When we look at the waiting lists by area over a period of time (Figure 4.17) we can see that overall numbers are falling, or remaining consistent in the case of Area A. Interestingly Area B which has the lower level of occupancy has the largest number on waiting lists.

Figure 4.17: Number on waiting lists by Area



Source: The Learning Trust

4.77 According to the Foundation fees are usually low because of issues of affordability. Families will often have 2 or more children of nursery age. Charedi parents do not generally qualify for the childcare component of tax credits because both parents are not working which is an additional reason for keeping fees low. As a result of this nurseries could benefit from better resources which they often can't afford to purchase.

4.78 Our research and discussions with the Foundation also found that the lack of resources in schools and nurseries are compounded by the lack of access to mainstream out of school provision. There is a need to develop after-school, weekend and holiday provision. The Interlink Foundation identified Step by Step as an organisation that provides excellent provision for children with special needs but is constantly having to fundraise, making planning for future provision very precarious. Out of School provision and access to outside leisure and sports facilities is limited due to strict separation of the sexes. Many homes are overcrowded and a number of households cannot afford toys for their children. There are around 15 organisations which offer out of school provision and more than 10 organisations offering holiday activities for children

in the community. The council has traditionally supported only one or two of the projects with ongoing funding. Otherwise these organisations have competed with others for a range of different funding streams including Hackney voluntary sector grants. In the present financial climate funding opportunities have narrowed and organisations are struggling to run out of school provision.

4.79 Nurseries seldom if at all close down because the demand is so high and single gender alternatives are scarce. As the number of children increases, so new classes and in some cases new nurseries open, as is the case in Area A. The Interlink Foundation estimates that there is a growth rate that represents an annual increase of at least 30 children representing a classroom, or in other words potentially one new school class per year. If this growth rate occurs recruitment and workforce issues may cause additional pressures on provision. However, as Figure 4.16 demonstrates, Area B has low occupancy levels and the most recent trend information suggests that waiting lists are falling.

4.80 At present there has been no perceived effect on provision for Orthodox Jewish children as a result of the recession. However, this may be attributed to the rise in the 0-5 year age group within this community and the demand for specialist provision and is not to say that the cost of the down-turn will not reach providers. There were 2 provider responses to the questionnaire and both providers agreed that they are experiencing increased rental costs which are effecting service provision. However, it was not felt that these costs will make the provision unsustainable. The providers have not seen a decline in demand due to the economic situation and it is likely that this is due to a lack of alternative and culturally suitable provision. Both providers would be willing to deliver new services to fill gaps in the market, however, only one provider felt that they would need support to introduce innovative solutions to needs. Interestingly, both providers did not agree that there needed to be greater marketing of childcare within Hackney. This was different to the overall picture from providers and may reflect the community based nature of the provision.

Summary & Recommendations

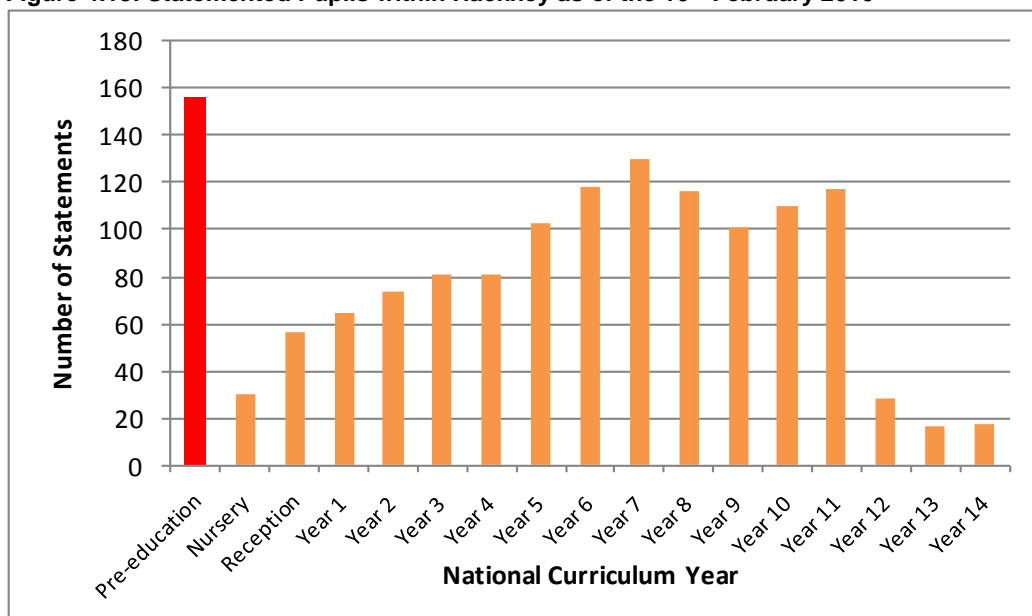
4.81 In light of the range within population estimates an assessment of the sufficiency of childcare to the Orthodox Jewish community is inconclusive. However, it would appear that across the two areas there is capacity to meet the current demand, especially in light of additional capacity being introduced in Area A as of September 2009. Given the high levels of occupancy in Area A, the introduction or re-allocation of provision into this area may be worth further exploration. Although the close proximity of the areas means that the issues associated with locality are minimised, discussions with The Interlink Foundation identified that the cost of childcare, including fees and transport are a heavy drain on the family budget.

Research Question 9: Are there sufficient childcare places available for children with special educational needs (SEN) and disabilities?

4.82 It is important that children with special educational needs and disabilities are able to participate in the same kinds of childcare as their peers and that provision for their families is represented in local childcare sufficiency. In terms of identification of children with SEN and/or disabilities, there are a variety of ways in which the numbers can be measured.

4.83 Figure 4.18, shows the number of school age pupils with statements as of the 10th February 2010. Statemented pupils have undergone a statutory assessment for Special Educational Needs and disabilities, and if additional support requirements are identified they are provided with a ‘statement’ which means that additional support may be provided to the schools. With regards to pre-national curriculum year, some data is collected on under 5’s and this is provided where paediatricians within Hackney Ark have identified children who may have special needs in the future. As of the 31st January there was 156 children, pre-education (red in Figure 4.18), who had need identified (but not statemented) by the health service. This represents a significant number of children who may need to be supported in the near future. The current number of statmented children is 1,243. Data from April 2009 shows 1,221 children with statements, therefore, there has been a 1.8% increase over 9 months. However, it is important to note that if the individuals needs can be met within the school and its resources then the individual would not show on the system as having a statement. It is highly likely that this number therefore under represents the true figure and the rise in statements may be reflected in the economic situation and settings inability to absorb the associated costs.

Figure 4.18: Statemented Pupils within Hackney as of the 10th February 2010



Source: The Learning Trust

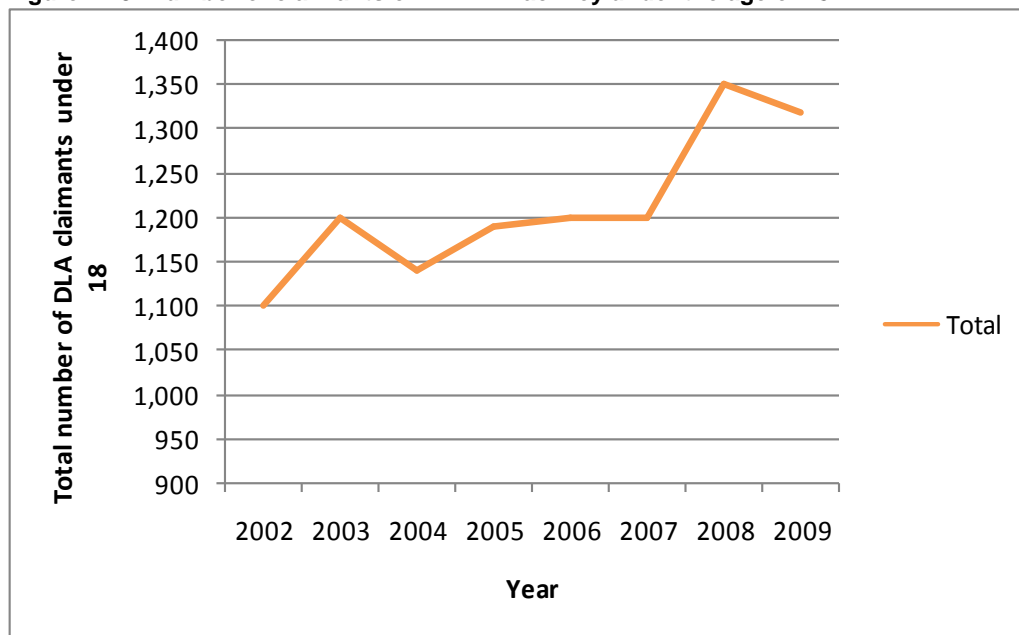
- 4.84** Schools in England are required to collect data on children with SEN only, through the School Census. The School Census does not capture information about all disabled children – for example it excludes pupils who are on the ‘earlier stages’ of School Action and School Action Plus, those who have a current medical condition or one that is in remission, and children with a mental health problem²⁰. The Learning Trust does not collect data for children on School Action or School Action Plus. The School Census is also considered to be limited in the extent to which it is likely to reflect the complexity of pupil needs, as there is evidence that a significant number of children will have more than one disabling condition²¹.
- 4.85** The number of open cases in Hackney Council’s Disabled Children’s Service as at 1 May 2009 was 232. Clearly this is a much smaller number than those obtained from other measures of the disabled child population, as is the case nationally. (A national research report says that “the number of children in contact with social care disability teams is only a small proportion of those who might be considered disabled”²²).
- 4.86** In October 2009 The Interlink Foundation undertook a mapping of Charedi disabled children in Stamford Hill. This piece of work had limited success due to issues around engagement and access to information, however, the number of children where they were able to obtain details was 157, with a further 80 identified. This takes the number to an estimated 237 for this specific community.
- 4.87** Nationally available data from NOMIS (care of ONS) shows that in 2009 there were 1,320 claimants of disability living allowance (DLA) in Hackney under the age of 18. Over the last seven years there has been a steady rise in this figure, as Figure 4.19 demonstrates. Overall there has been a 17% increase in the number of claimants between 2002 and 2009, and it is likely that these figures are un-representative of the true figure.

²⁰ Porter J., Daniels H., Georgeson J., Hacker J., Gallop V., Feiler A., Tarleton B. & Watson D. (2008), *Disability Data Collection for Children’s Services*, DCSF Research Report DCSF-RR062, p. 14

²¹ Porter J. & Lacey P. (2008), “Safe-guarding the needs of children with a visual impairment in non-VI special schools”, quoted in Porter et al (2008), *Disability Data Collection for Children’s Services*, p. 14

²² Mooney A., Owen C. & Statham J. (2008), *Disabled Children: Numbers, Characteristics and Local Service Provision*, DCSF Research Report DCSF-RR042, p. 31

Figure 4.19: Number of claimants of DLA in Hackney under the age of 18



Source: Nomis

4.88 If we look at the DLA recipients for 2008 aged under 16 we can begin to understand how the number of claimants breaks down geographically. As we can see in Table 4.9, Kings Park and Wick (Area D) along with Queensbridge (Area F) has the largest concentration (rate per 1,000 children). Whereas New River (Area A / B) and Clissold (Area A) have the lowest concentration.

Table 4.9: 2008 DLA recipients under 16, by ward

Ward name	DLA claimants aged under 16	Rate per 1,000 children aged 0 to 14 years
Brownswood	45	28.57
Cazenove	65	20.21
Chatham	70	28.48
Clissold	40	18.16
Dalston	55	28.74
De Beauvoir	40	21.18
Hackney Central	50	24.44
Hackney Downs	60	27.51
Haggerston	55	28.34
Hoxton	45	24.05
King's Park	85	36.86
Leabridge	55	25.56
Lordship	65	21.53
New River	50	16.86
Queensbridge	70	35.99
Springfield	90	24.86
Stoke Newington Central	40	20.21
Victoria	70	29.40
Wick	75	35.11

Source: Disabled Children's Service, Hackney Ark

4.89 The estimated total number of children and young people in Hackney aged 0 to 17 as at 2009 is 53,319²³. The Family Resources Survey calculated in 2004/05 that the percentage of children with a disability is 7.3%. This is a national household survey conducted annually for the Department for Work & Pensions (DWP), and uses a Disability Discrimination Act (DDA) measure of disability. A recent study called '*Can We Count Them?*' concluded that this is the best available source for estimating the national prevalence of disability amongst children²⁴. Based on this estimate, the number of children and young people aged under 18 in Hackney with a disability as defined by DDA would be 3,892. Unfortunately, this national estimate does not help us identify whether the percentage of children with a disability in Hackney may be higher or lower than in other authorities. Together for Disabled Children (TDC), the Government's consultancy for the short breaks transformation programme nationally, have advised that 1.2% should be taken as a guideline percentage for severely disabled children, who should be considered the priority for service improvement within the programme. Based on this estimate there would be 640 severely disabled children and young people in Hackney. Unfortunately, the same issue applies again that this estimate does not help us identify whether the percentage in Hackney is different to that in other authorities.

4.90 As the previous refresh identified, the 2008 report *Disabled Children: Numbers, Characteristics and Local Service Provision, DCSF, 2008*, puts the number of children with disabilities in Hackney as between 1,205 and 2,126. The report also found that boys are twice as likely as girls to be categorised as disabled that children under five are less likely to be known to be disabled.

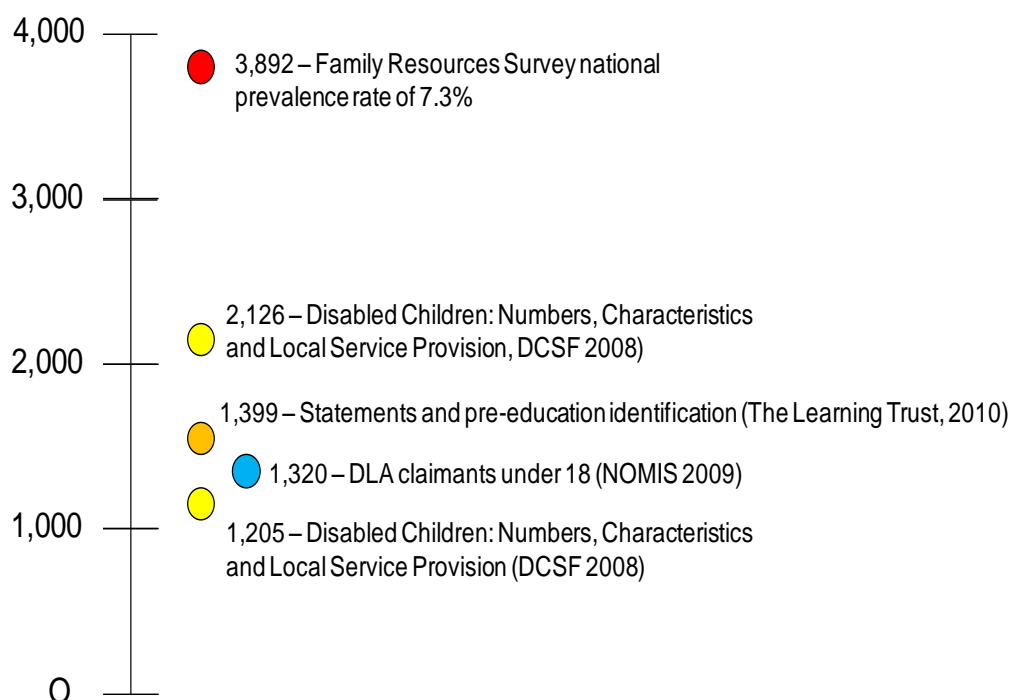
4.91 All of these methods need to be treated with caution as they are likely to under-represent the population of children with disabilities and do not provide a definitive number of children with SEN and disabilities. As we can see in Figure 4.20, utilising the estimates provided the estimated range of children with SEN and or disabilities is anywhere between 1,205 and 3,892 children²⁵ with the mean figure being 1,990.

²³ Greater London Authority (GLA) Data Management and Analysis Group figures

²⁴ Read J., Spencer N. & Blackburn C. (2007), *Can We Count Them? Disabled Children and Their Households*, quoted in Mooney et al (2008), *Disabled Children: Numbers, Characteristics and Local Service Provision*

²⁵ Only 45 parental responses identified that their children had any particular needs and this was predominately SEN.

Figure 4.20: Range of children with SEN and disabilities



4.92 The Learning Trust provides funding for a number of children aged 0 – 19 with special educational needs and/or disabilities throughout the year, to access early years and play provision. This number fluctuates yearly and the figures therefore can be misleading. There are 16 settings that have received funding from The Learning Trust for more than 2 years and these settings have places for 131 children (see Table 4.10 for a breakdown of this support). These figures only represent the provision that is sustained and directly funded by The Learning Trust and is therefore not a complete picture of the market.

Table 4.10: Specialist provision funded by The Learning Trust

Description of activity funded	Number of places supported
After school club	10
Play group	35
Nursery	6
Holiday play scheme	80

Source: The Learning Trust

4.93 Provision is also made up of support for children who have a ‘statement’ and these placements may be temporary and delivered through key workers. Therefore, the picture of provision is potentially, support for the 1,243 statemented pupils, plus the additional 131 specialist places, equalling an estimated 1,374 places. It has not been possible to obtain a definitive number of places, however, discussions with key staff who work in this field delivered a consistent message that there are not enough specialist places for children.

4.94 Twenty providers (40%) identified that they have specialist places for children with special educational needs and/or disabilities. Within this provision 0 to 2 and 3 to 4 year olds had the largest amount of capacity with 16 providers stating they have provision for these age groups. This is followed by 5 to 7 and 8 to 11 age ranges with 4 providers identifying provision. Interestingly, no providers identified provision for older children aged between 12 to 17 years of age. Within these providers 24% identified demand that they could not meet. Interestingly only one provider identified accessibility as an issue and no providers identified that lack of equipment was a problem. To date, a number of providers have received no requests for specialist provision but would be happy to accommodate individuals with SEN and have stated that are able to as staff have been trained. Inclusivity and opportunities for all clearly came through in provider comments and whilst some providers identified that would have capacity to take children with specialist need there was also acknowledgement from others that sometimes they can't meet the needs of all of the children, due to staff's capacity to support any extra children with SEN.

4.95 Childcare is identified as a 'vital service' for the families of disabled children and young people in Aiming High for Disabled Children (2007) and yet the report identified the following additional factors impacting on the supply of childcare places: (1) attitudinal barriers on the part of some providers; (2) the cost of transport; and (3) a lack of training to enable providers to care appropriately for children and young people with significant communication difficulties, medical problems or behavioural difficulties. While there are examples of excellent practice in some places, research by the Daycare Trust in 2007 identified the following as particular issues for families:

- lack of appropriate places for disabled children, particularly lack of specialised childcare tailored to individual support needs
- lack of suitably trained people to work with disabled children
- lack of appropriate facilities
- too few appropriate settings for older children
- too few settings where families are able to place both their disabled and non-disabled children.

4.96 An extensive consultation process has been completed by the Council with both the parents/carers of disabled children, young people and with disabled children and young people themselves. Questionnaire responses were received from 190 parents/carers, and 77 parents/carers attended consultation events. Additionally a total of 111 disabled children and young people attended a series of consultation sessions²⁶. This consultation found that information on

²⁶ Full consultation reports are available through the Council's website at http://www.consultationfinder.com/hackney/consultation_Dtl.aspx?consult_Id=510.

services and support available services needs to be improved. Providers' staff skill levels are important to families and families tend to have greater trust in specialist services compared to mainstream services, indicating that the specialist provision identified in Table 4.10 is important. Furthermore, parents identified gaps in the availability of appropriate transport provision to/from services; therefore distribution of provision needs to be aligned to need.

- 4.97** As part of the Council's consultation process feedback was also sought from a range of statutory and voluntary sector professionals working with disabled children and young people. Thirty three written questionnaire responses were received. Professionals perceived that places in mainstream/universal settings are sometimes available for disabled children in principle but not in practice because there are not additional support resources available. A mixture of some improved targeted/specialist services plus improved support to access universal/mainstream services is felt by most to be the best approach to meet demand.
- 4.98** A recurrent 'barrier to childcare' - highlighted by parents of children with special needs and disabilities during the research conducted in 2007 - concerned the issue of transport - both transport to a potential childcare provider and more frequently transport which returned a child to their home. Additionally, consultation conducted by The Learning Trust in order to inform its 2007 Play Strategy highlighted a shortage of out of school childcare places for children with special needs and disabilities.
- 4.99** Central Government have identified an additional £12.5 million in funds to support parents with disabled children. The cash injection will fund the national roll out of the Disabled Children's Access to Childcare Programme, following ten successful pilots across the country. The programme will help parents of disabled children, who are understandably cautious about using childcare, benefit from expert advice and support when choosing services for their child. As part of the programme, 'Parent Champions', who are parents in the local area who have experience of using childcare for their own disabled children, could help other parents understand the services and support available to them. The champions would be recruited by local authorities across the country to promote the new services to other parents. The £12.5 million fund is being allocated across the country, with the remaining 142 local authorities who were not part of the pilot each receiving at least £59,000. Local authorities will have flexibility to use the funds to meet local needs, choosing from a range of options developed by the ten pathfinders²⁷.

²⁷ For full information on the story visit: <http://www.egovmonitor.com/node/32310/print>

Summary & Recommendations

4.100 As Figure 4.20 demonstrates, the range of children with SEN and/or disabilities is quite large; therefore, it is not possible to identify definitively the number of children who may require specialist childcare. Also, because of the nature of funding through the statement process any comprehensive assessment of sufficiency will require a full canvass of all providers to assess their capacity to provide specialist placements to children with special needs.

4.101 DCSF and partners published 'Disabled Children's Access to Childcare (DCATCH) pilot activity in December 2009. We would recommend that the lessons learned from this pilot activity are reviewed and adapted where applicable to Hackney.

Research Question 10: Explore if there is capacity in the childcare sector to provide wrap around services for 3 & 4 year olds, taking into consideration that schools will be moving to more part time places from April 2010.

4.102 Parental comments from the questionnaires clearly identified that greater flexibility and the creation of 'wrap around' services is a need within the current childcare market, below are some of the comments received:

'I lost my job in part because of asking for flexible working.' **Hackney Resident**

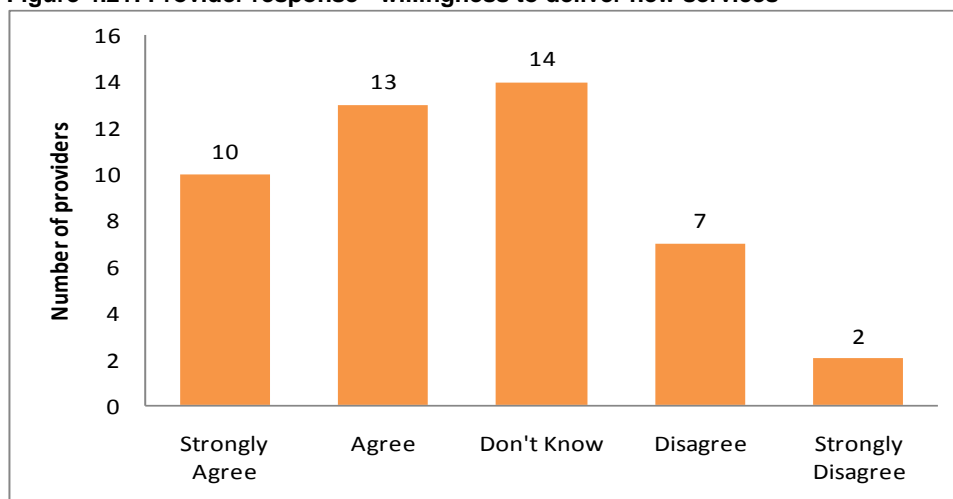
'I think wrap around care is not happening as promised. I can't get my son a place in after school club and many parents are dissatisfied with this.'
Hackney Resident

'Finishing at 5.45 for working parents is not very flexible or ideal. Please extend to 6.15.' **Hackney Resident**

'Would like extended pick-up time as I sometimes work late.' **Hackney Resident**

4.103 Taking into consideration that schools will be moving to more part time places from April 2010, there may be an opportunity to provide wrap around services for 3 and 4 year olds. In light of this providers were asked if they would be willing to deliver new services to fill gaps in the market. As Figure 4.21 shows, around 50% of providers would be interested in delivering new services. Providers were also asked if they would need more support to introduce these innovative solutions and 78% felt that this would be important.

Figure 4.21: Provider response - willingness to deliver new services



Source: 2010 CSA Refresh Provider Questionnaire

4.104 Some providers have expressed an interest in alternative provision to Business Support; however, these have tended to be playgroups who want to move away from session (AM-PM) based provision to be open throughout the day in recognition of the demand for greater flexibility. Thus far they have been precluded from doing this because of the following: concern that they could not charge the true cost of delivery so are looking for a grant, location, concern there is not demand due to local schools providing wrap around services such as breakfast and after school clubs. Another notable barrier relates to playgroups and those establishments that have previously paid no rent due to the use of community facilities. In some instances these establishments are being asked to pay £5,000 per year which they have not had to account for before. Any extension to opening hours is likely to incur even higher costs.

4.105 A majority of the schools in Hackney provide free extended school activities and also have out of school activities, for which there is a charge. This has traditionally led providers to be a little concerned as to if there will be a demand for their provision within the area. However, with the impending elections and cut-backs to public spending, the extended schools agenda may be threatened and therefore the market may become more open.

Summary & Recommendations

4.106 Overall, provider interest in delivering new services was positive with 50% of respondents showing a willingness to deliver new services to meet need, including wrap around provision for 3 and 4 year olds. In order to unlock this additional capacity and innovation The Learning Trust may need to identify the support required by providers, including identification of areas of need and potential new markets. Further support may also be required to help disseminate best practice and examples of where other providers have developed successful models.

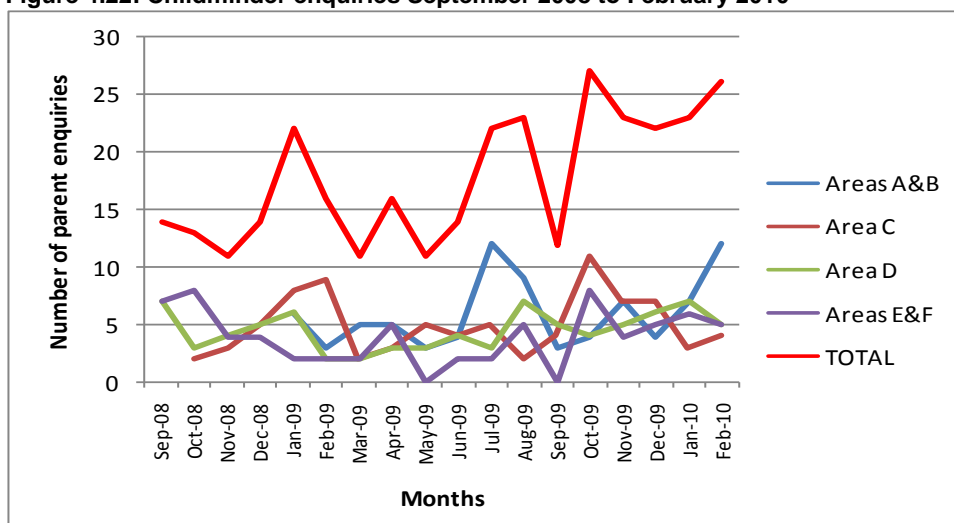
Research Question 11: Assess if the reputation of childminders has improved since the previous refresh?

4.107 Hackney currently has three childminding Networks²⁸ in the borough which are approved by the National Childminding Association ‘*Children Come First*’ Quality Assurance Scheme and uses Networks and the Quality Assurance Scheme as a way of promoting and maintaining a quality service within the borough. Hackney’s three networks align to the planning areas as follows:

- North Hackney Network – Areas A & B
- Central & Easy Hackney Network – Areas C & D
- South Hackney Network - Areas E & F

4.108 The purpose of childminding networks is to ensure good quality childcare for children and their families. Only experienced, high quality childminders are on the network, which provide support and development to childminders in Hackney who have shown that they can deliver high quality, child-centred, home based care. Not being part of the childminder network does not mean that the service offered is not of a high standard, however, it may be inferred that the quality standards applied to the networks provide re-assurance to parents and therefore, an increase in the number of enquiries indicates a positive perception of the provision. Figure 4.22 displays the parent enquiries month by month, for each of the planning areas. These are direct enquiries that the Network Co-ordinators have dealt with. As a result of these enquiries childminder lists are distributed, which include details of network childminders along with the benefits of using network childminder. The FIS also recorded 162 enquiries for childminder places between October 2009 and February 2010, this is an average of 32 enquiries a month.

Figure 4.22: Childminder enquiries September 2008 to February 2010



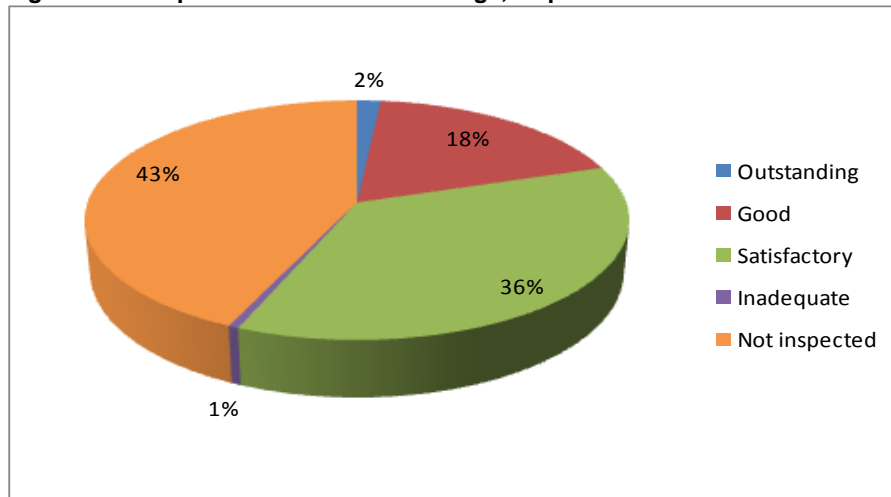
Source: The Learning Trust

²⁸ Childminding Networks are a formal group of registered Childminders who are recruited, assessed and monitored by a co-ordinator

4.109 Despite there being 3 childminder networks, Planning Areas C and D each have a co-ordinator, thus Figure 4.22 has been split to better reflect the co-ordinators capacity. It is also important to note that the co-ordinators for Areas A&B and E&F only work 4 days a week. As we can see from the overall total there is an upwards trend in the number of enquiries for network providers, demonstrating positive parental perception and increased awareness. During this same period there has been a 9% increase in the number of network providers, bringing the total network provision to 32% of the market.

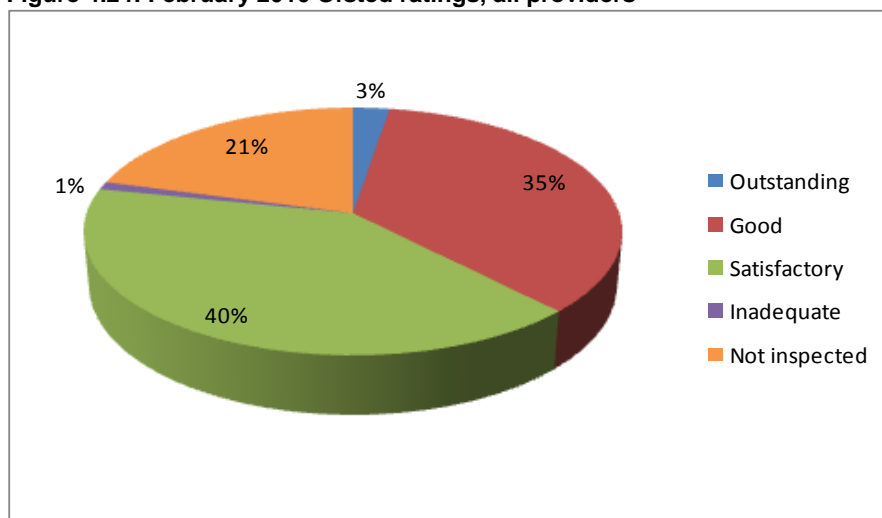
4.110 With regards to improvements in quality over a similar period of time the Ofsted grading for childminder provision is the one that is most significant and the one parents will be looking at. If we compare and contrast September 2008 (Figure 4.23) with the current (Figure 4.24) Ofsted ratings we can see that the quality of provision has increased.

Figure 4.23: September 2008 Ofsted ratings, all providers



Source: The Learning Trust

Figure 4.24: February 2010 Ofsted ratings, all providers



Source: The Learning Trust

4.111 As we can see from the comparison between the Ofsted ratings, there has been an 18% reduction between 2008 and 2010 in the number of providers classified as not inspected. This will help to ensure that the required standards are in place within provision. During the same period there has also been a 17% increase in the classified as good, whilst the satisfactory provision has also risen by 4%. It would appear that the next step would be supporting the movement of the 40% of provider that are satisfactory into good and move the good provision into outstanding.

4.112 This analysis focuses on the overall childminder provision due to the system in 2008 not differentiating between network and non-network providers, also membership at this point was quite low. However, if we look at the network providers in comparison to the non-network currently, we can see that the percentage deemed good is much higher (56%) than non-network providers (25%). Also the number of network providers classified as not inspected was only 5 (7%) as opposed to 36 providers (28%). It would appear that the introduction of the network system has helped to drive up the level of quality within the area.

Summary & Recommendations

4.113 It would appear that the overall reputation / perception of childminders has improved. Overall, 86% of the parental respondents who have used childminder services (69 in total) were satisfied with the provision, and only 4% identified that they were not happy. In terms of perceived improvement, 62% of these people felt that the service had stayed the same over period of their use, whereas 35% had seen improvements and only 4% had seen a decline (correlating with levels of dissatisfaction).

4.114 It is also important to note that these perceptions correlate with improvements in Ofsted ratings, which have seen a 17% increase in the number of providers classified as good since the previous refresh was conducted. Also the average number of enquiries for childminder provision has grown over an 18 month period, suggesting that childminder provision is increasingly being viewed in a positive light.

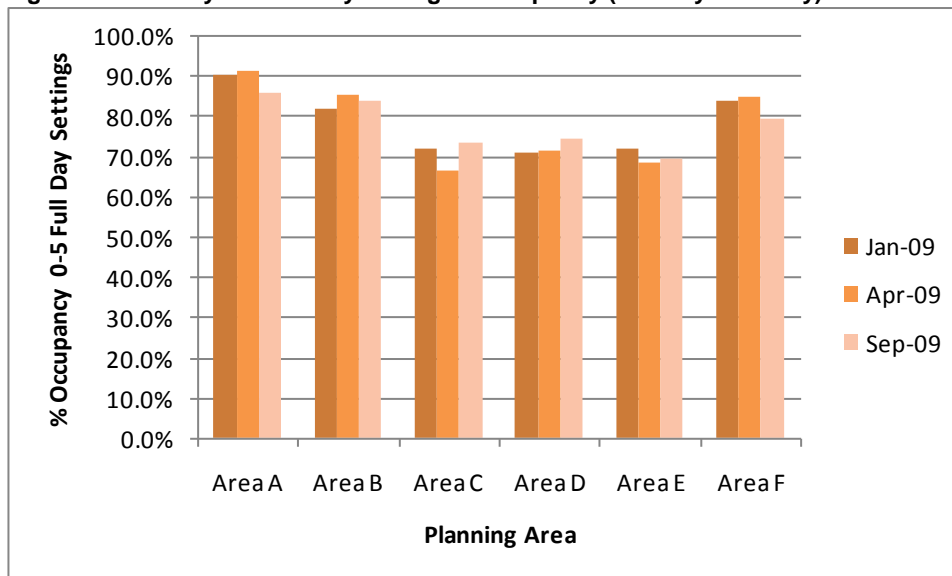
5 ADDITIONAL OBSERVATIONS

Supply and Demand

5.1 The number of childcare places is lower in London than in England as a whole and childcare is considerably more expensive. The latest available figures, for August 2008, show there were 84,700 places in day nurseries in London²⁹. This represents 16.3 places for every 100 children aged under five, in comparison with an average of 21.4 per 100 in England as a whole. There were also 41,000 places with childminders in London, representing 7.9 per 100, compared with 9.9 in England. Childminding provision in Outer London was close to the England average, while in Inner London it was considerably lower. Places in out of school clubs, however, are more numerous in Inner London, at 8.5 per 100 children aged 5 to 14, compared with 6.4 per 100 in Outer London, which is just above the England average of 6.2.

5.2 In assessing the demand for childcare for children under the age of 3, we have also undertaken some analysis on the occupancy of childcare for children aged 0 to 5 years. As per section 4.3 we have focused on snapshot data collected by The Learning Trust in January, April and September 2009. These figures, unlike section 4.3 are calculated using the actual occupancy as a percentage of the ideal capacity and is restricted to Monday to Friday provision.

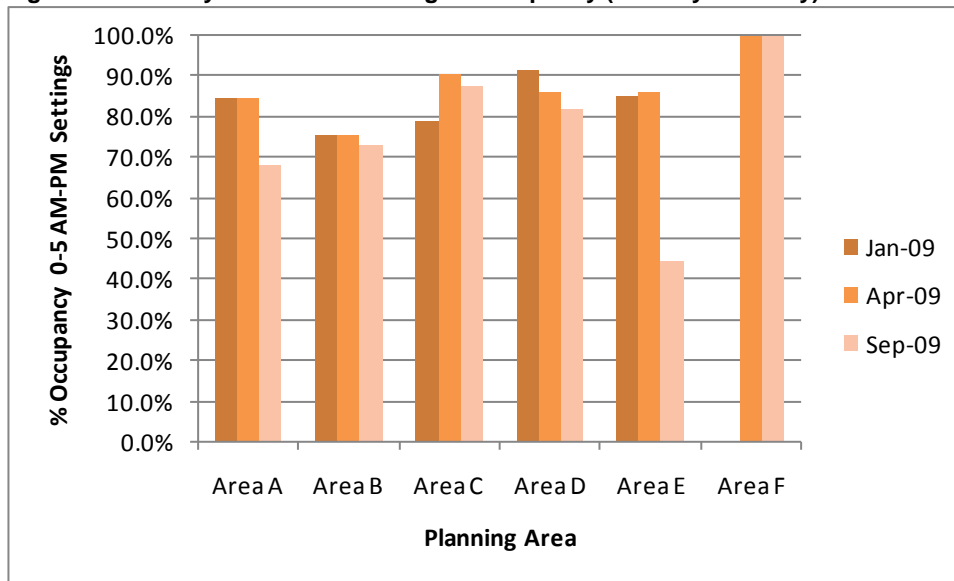
Figure 5.1: 0 to 5 years full day setting % occupancy (Monday to Friday)



Source: The Learning Trust

²⁹ Registered childcare providers and places, quarterly childcare statistics as at 31 August 2008, Ofsted September 2008.

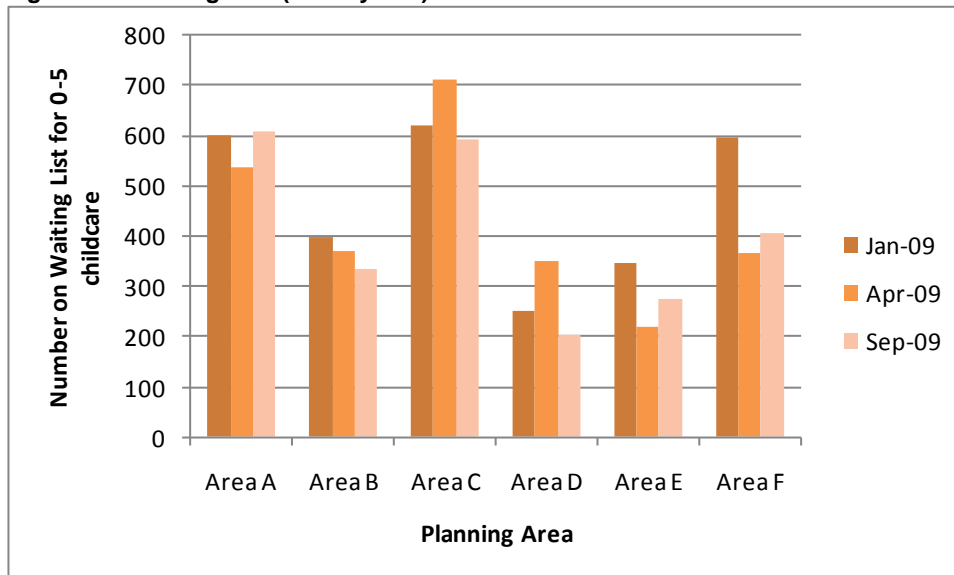
Figure 5.2: 0 to 5 years AM-PM setting % occupancy (Monday to Friday)



Source: The Learning Trust

5.3 Overall occupancy levels have fluctuated slightly over this nine month period and the overall picture of waiting lists has decreased by 14% between January and September, as can be seen by Figure 5.2. However, childcare can be somewhat seasonal, for example, FIS encounter high levels of enquiries for holiday play schemes around Easter and summer. Out of school provision and affordability are also common themes.

Figure 5.3: Waiting lists (0 to 5 years)



Source: The Learning Trust

5.4 Information from the parental survey (Table 5.1) breaks down the waiting period of parents by age groups and identifies that the average waiting time for parent is around 3 months.

Table 5.1: Average waiting time for childcare

Waiting Period	0 – 2 yrs old	3 – 4 yrs old	5 – 7 yrs old	8 – 11 yrs old	12 – 14 yrs old
Up to 3 months	42.1%	53.6%	62.5%	90%	100%
3 to 6 months	18.4%	14.6%	12.5%	10%	0%
6 to 12 months	15.8%	9.8%	18.75%	0%	0%
More than 12 months	23.7%	22.0%	6.25%	0%	0%

Source: 2010 CSA Refresh Parental Questionnaire

5.5 Table 5.2, provides the total childcare hours used by children segmented by age groups as identified by the questionnaires. Then identifies the additional hours they may use if the services existed and were affordable. This represents a significant growth in hours; however, due to the cost of this additional support it is likely that the extra demand will not be fully realised.

Table 5.2: Potential additional demand

Age	Number of respondents	Average number of hours of childcare used per week	Additional hours if the services existed and the cost was affordable to you	Variance
0 to 2 years	113	2537 hours	1206 hours	+47.5%
3 to 4 years	149	3018 hours	1036 hours	+34.3%
5 to 7 years	87	777 hours	348 hours	+44.8%
8 to 11 years	57	415 hours	241 hours	+58.0%
12 to 14 years	7	147 hours	9 hours	+6.1%

Source: 2010 CSA Refresh Parental Questionnaire

Perceptions

Table 5.3: Parental perceptions

	Improvement			Satisfaction		
	Improved	Same	Declined	Satisfied	Neither	Dissatisfied
Child minders	35%	62%	4%	86%	10%	4%
Out of school	51%	47%	2%	83%	12%	6%
Holiday play schemes	47%	44%	8%	73%	13%	14%
Pre-school	50%	46%	3%	88%	8%	4%
Nursery schools	49%	47%	4%	86%	10%	4%
Children's centres	58%	38%	4%	87%	7%	6%
Choice of providers	38%	54%	8%	57%	32%	11%
Availability of places	26%	53%	21%	48%	24%	28%
Cost of services	19%	60%	21%	49%	20%	30%
Opening hours	28%	68%	5%	71%	16%	13%
Flexibility	29%	62%	9%	54%	32%	15%
Location and distance to travel	23%	73%	4%	80%	15%	6%
Quality of staff	54%	42%	5%	90%	8%	2%
Quality of service	46%	52%	2%	86%	11%	3%