



Bexley 2010 Childcare Sufficiency Assessment Executive Summary

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1 Introduction

The Childcare Act 2006 places a duty on local authorities to undertake a Childcare Sufficiency Assessment (CSA) every three years. The last assessment was carried out in 2007-8.¹ The assessment is a necessary step towards securing, so far as is reasonably practicable, sufficient provision of childcare to meet the requirements of parents and carers, to enable them to work or undertake training leading to work.

The assessment will identify any gaps in childcare provision by age group and area and inform the Council in their planning to secure sufficient childcare in the borough.

Local authorities are required to secure sufficient childcare for the needs of working parents in their area for children up to 1st September after their 14th birthday, or until they reach the age of 18 in the case of children with a disability.

It is understood that childcare is provided both 'formally' through OfSTED registered providers for children under 8 and other organised activities for older children, or 'informally' through family and friends.

The main purpose of childcare provision is to provide supervised play opportunities for children in the absence of their parents.

This is an Executive Summary of the full Childcare Sufficiency Assessment (CSA) document which is held at www.bexley.gov.uk. The full CSA:

- examines demographic data about Bexley including that which could impact on the childcare market
- provides a robust view of current parental demand drawn from a survey of parents enhanced by focus groups, a survey of local employers and other evidence of demand from stakeholders including providers
- provides an audit of supply of childcare as collated by Bexley Children's Information Service and enhanced by evidence from stakeholders including providers
- gives the results of consultation with young people on their views about out of school childcare
- includes a detailed analysis of gaps in provision.

The gap analysis explores possible gaps in the childcare market under the following categories:-

¹ The previous assessment can be found at www.bexley.gov.uk

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- geographical : areas where there is a general shortage of provision including type of childcare
 - age: where there is a shortage of childcare for children of a particular age group
 - income: areas: where there is a shortage of affordable childcare for the income groups in that area
 - specific needs : where there is a shortage of suitable places for children with a disability or other requirement
 - time: where there is a shortage of childcare at times parents require e.g. school holidays

The level of assessment for the full CSA document and the Executive Summary has been at Bexley level and where possible by cluster group as it is used for planning services for children and families in the borough.

2 General picture

Generally parents in Bexley seem reasonably satisfied with current childcare provision. The quantitative element of the research, the parental demand survey, showed that the vast majority of respondents were happy with the childcare they used.

Ofsted reporting on the quality and effectiveness of childcare in Bexley shows a picture that is above the national average by most indicators. A recent (2010) audit of full daycare settings and pre-schools within the borough undertaken by the Early Years Training Team showed that of those responding (57 settings representing 613 staff) just around two thirds (64%) of the workforce was qualified to level 3 or above. The childminders in Bexley's childminding network are of a very high quality in terms of training and qualifications. Three of them are currently studying for their early years' foundation degree. 14 out of 32 are judged by Ofsted as 'outstanding', the rest are all 'good'.

Only around a quarter (23%) of the respondents to the parental demand survey uses formal childcare to enable them to work, study or train. The same proportion (23%) uses family or friends and 8% of respondents use a mix of family and friends and other childcare providers.

The main complaint was about expense. More than half of the survey respondents 'agreed' or 'agreed strongly' that it was 'easy to find a childcare place' as there were vacancies with 11% who 'disagreed' or 'strongly disagreed' with the statement.

The opinion of parental survey respondents with a child with additional needs regarding the childcare used to enable them to work, study or train, was much the same as others. The number of respondents (23) to the survey was very small and when parents of children with additional needs were given an opportunity to discuss childcare issues in more detail as part of a focus group they indicated they felt there was a general shortage of suitable childcare for all age groups of disabled children, a view reiterated during the stakeholder interviews.

Most parents attending the research focus groups had a good idea of where to access information about childcare and knew about various options, regulation and inspection. Children's centres, schools and Jobcentre Plus were seen as valuable sources, as well as the internet, and 'the council'.

The vast majority (nearly 84%) of children and young people surveyed across the age range (aged seven to 16), felt they had a good choice of out of school clubs and activities based at their school. 65% of those surveyed thought there was a good choice of clubs and activities close to where they live and nearly three quarters cited the playground or park as the most used activity in the last six months. ²

The socio-demographic changes under way indicate that whilst there is a relatively stable 0-19 population, the five to seven population is expected to rise by just under 9% between 2011 and 2014, the period of this Childcare Sufficiency Assessment.

Against this generally positive picture there are particular areas of shortage, (perceived, potential and actual) and it is these areas which have been explored in detail through the gap analysis.

3 Demographic and other background data

3.1 Demographic data

Bexley is one of thirty-two London boroughs which, together with the City of London Corporation, make up the area of Greater London. Bexley is situated in the south east of London and borders the Thames to the north, the boroughs of Greenwich to the west, Bromley to the south and the County of Kent to the east.

² Children were able to record more than one activity

Bexley has been divided into five clusters to allow the planning, management and delivery of children and young people's services. The Cluster boundaries are contiguous with ward boundaries. The most populous of the Clusters is Cluster 2 with 54,068 residents and the least populous is Cluster 1 with 33,181³ residents.

In the next 5 years an additional 1,793 homes are planned with most of these in Clusters 1 and 2.

The majority of the population of Bexley is White. During the period 2011 to 2014 the overall proportion of White is expected to fall from 87% to 85%.

The 0-19⁴ population in Bexley is set to rise very slightly from 53,773 in 2011 to 54,047 in 2014, an extra 274 young people. The comparable figures for the 0-14 population are 40,358 (2011) and 41,340 (2014).

Year groupings 3 & 4, 5-7 and 8-10 are rising; year groupings 11-14, 15-17 and 18-19 are falling whilst 0-1 and 2 are expected to remain pretty constant. The Primary Schools Census (Spring 2010) shows a picture of a predominantly white population (75%) for Bexley's children and young people although this is significantly less than for the population as a whole (85%).

The same Schools' Census reported that 1,938 children out of 15,849 (12%) had a first language which was not English and in Cluster 1 this was around three times as high as in any other cluster at 29%.

According to HMRC statistics⁵, 18.2% of children are living in poverty⁶ in Bexley, in comparison with 21.6% nationally. This equates to 9,420 dependent children under 20 years of age, or 8,520 children under 16. Most of these children live in Clusters 1 and 2.

The number of disabled children in Bexley can be estimated at 7% (3,380 0-17 year olds) and the number of severely disabled children at 1.2% (calculated at 649 children according to Bexley's Local Area Implementation Plan).

³ Mid-2007 Population Estimates for 2009 Wards in England and Wales by Quinary Age and Sex, and Working Age. Data source and copyright Office for National Statistics

⁴ RND 2008 Ward Population Projections London Plan - 11 March 2010 © Greater London Authority, 2010

⁵ Figures are rounded to the nearest 5, this means that summing the individual rows/columns will not always sum to the total correctly.

⁶ This is defined as the number of children living in families in receipt of Child Tax Credit whose reported income is less than 60 per cent of the median income or in receipt of Income Support or (Income-Based) Job Seeker's Allowance, divided by the total number of children in the area (determined by Child Benefit data)

3.2 Factors that could impact on childcare required for parents to work or train

Bexley's recent economic history is one of decline and under-performance. Despite being part of the London East sub-region, the third largest economy in the country, the borough is performing relatively badly.

In Bexley there is currently relatively poor public transport. Only 40% of the Borough's population live within 800 metres of a rail station (the planning criterion used by rail companies and London Transport), ranking it 31st worst out of the 33 London boroughs.

The planned Crossrail project (due for completion 2017) will significantly reduce journey times - Abbey Wood in Cluster 1 to Whitechapel in 16 minutes for example. Connections will also be improved.

Bexley⁷ has a relatively low skilled workforce, despite having some of the best school attainment results in London.

Data provided by CACI⁸ shows that the mean household income for the 94,786 households in Bexley was £35,017 in 2009. This is significantly lower than the figure for London as a whole, which is £39,384. Clusters 1 and 2 have the higher proportion of households with lower incomes, whether analysed by annual income under £15,000 or annual income under £35,000. Even though house prices are relatively low in comparison with many other London boroughs, the high income-to-house price ratio for lower income families illustrates how many working households, including those on whom Bexley residents rely to provide essential public services, are still struggling to buy a home.

While unemployment rates are generally low at 71.9% for the borough as a whole⁹, they vary significantly across the borough. Communities in the regeneration areas in the north of the borough experience higher rates than the national average and account for 50% of the borough's unemployment while containing only 30% of the population. The¹⁰ total number of Bexley residents claiming Job Seeker's Allowance (JSA) as at April 2010 was 4785 which represented a decrease of 176 on this time last year.

⁷ The Invest Bexley Regeneration Framework 2007 - 2016

⁸ CACI Equalised Paycheck Data 2009. Kindly reproduced with permission from CACI.

⁹ Labour market snapshot: April 2010

¹⁰ This extract has been taken with grateful thanks from the Labour Market Bulletin for Bexley Local Authority Area April 2010

The twin foundations for Bexley's regeneration strategy as outlined in the Bexley Core Strategy Preferred Approach Paper Draft for Consultation – February 2010 are Bexley's position in the heart of the Thames Gateway, the largest regeneration area in Europe; and that large parts of the north of the borough are located within the London Plan Opportunity Areas.

In the document there is a stated target of a net increase in the number of employees in Bexley of 12,500 by 2026.

It is the areas mainly located in the north of the borough that have often been subject to post war redevelopment, that are the ongoing focus for improvement and regeneration. Within these areas are greater incidence of crime and multiple deprivation, although specific elements of this, such as lack of skills and educational attainment are a borough-wide issue.

The rate of teenage conceptions in Bexley is broadly comparable with Kent and Bromley, much less than Greenwich, but is at its highest level for the period reported (1998 - 2008).

3085 lone parents claimed benefits in Bexley in 2009 of which nearly half (1,240) were resident in Cluster 2.

4 Demand for childcare

4.1 Parental demand survey

Firstcare carried out a parental demand survey in June 2010 to inform the London Borough of Bexley's Childcare Sufficiency Assessment 2011. A sample of 707 parents with children in the age range was interviewed face to face in their homes during June 2010. The survey sample was broadly representative of Bexley's population in terms of geography, ethnicity, numbers of lone parents and receipt of free school meals.

4.1.1 Profile of respondents

- Geographical split across Clusters in proportion to number of 5-16 year olds in each Cluster as defined by latest Schools' Census data
- All respondents had children aged 14 or under:
 - 36% of respondents had children aged 0-2
 - 26% children aged 3-4
 - 60% children aged 5-11 and
 - 31% children aged 12-14
- 34% of respondents had one child, 44% two children, 16% three children and 5% four or more.
- 10% of respondents had a child with special needs
- 20% of respondents were male and 80% female.
- 5% of respondents were aged under 24, 10% 26-29, 45% 31-39, 36% 40-49 and 5% 50 or above.
- Three in four of the sample (78%) were White British or Irish, 5% other White ethnic groups, 5% Asian, 8% Black and 4% other ethnic groups. This closely matches estimates for school children in the Borough as a whole.
- 18% of respondents were lone parents, again representative of the Borough as a whole.
- 12% said their children were eligible for free school meals.

4.1.2 Likelihood of using childcare

Overall, just over a third of respondents used childcare to enable them to work, study or train.

The following are more likely than average to use childcare:

- People with children aged 3-4 (many using school-based part-time nursery classes);
- People living in cluster areas 3, 4 or 5;
- Black respondents
- People with a household income of more than £30,000pa.

The following are less likely than average to use childcare:

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- People with children aged 12-14;
 - People living in Cluster areas 1 or 2;
 - Respondents who are unemployed or full-time carers;
 - People with a household income of less than £30,000pa.

4.1.3 Childcare used

- Only around a quarter (23%) of respondents uses formal childcare to enable them to work, study or train. The same proportion (23%) uses family or friends and 8% of respondents use a mix of family and friends and other childcare providers.
- 6% of respondents use a registered childminder, 6% a part-time nursery class attached to a school, 6% a day nursery (full or part-time), 5% a breakfast club, 5% an after school club on the school site, 1% an after school club off site, 1% a pre-school or playgroup and 1% holiday play schemes.

4.1.4 Opinion of childcare used

The survey showed that the vast majority of respondents were happy with the childcare they used. The main complaint was about the expense.

The vast majority of respondents said the childcare used was the best option for them. This proportion was similar for all groups of respondents. A total of 7% of respondents using childcare had a comment to make about the hours or days, with most of these respondents wanting the childcare to be open longer. A total of 28% of respondents using childcare had a comment to make about the cost; mainly that it was too expensive.

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- 59% of respondents using childcare for under 5's said they were very happy and 29% happy with their childcare arrangements but 7% disagreed;
 - 56% of respondents using childcare for over 5's said they were very happy and 25% happy with their childcare arrangements but 3% disagreed;
 - 62% agreed strongly that their childcare was in a convenient place and 33% agreed with 3% disagreeing;
 - 61% agreed strongly and 33% agreed that their childcare catered for their children's needs but 3% disagreed;
 - 43% agreed strongly and 28% agreed that staff had appropriate skills with 1% disagreeing;
 - 41% strongly agreed and 28% agreed that their childcare was affordable but 11% disagreed;
 - 52% strongly agreed and 30% agreed that their childcare met their child's cultural needs with 3% disagreeing
 - All respondents trusted their childcare provider with 72% agreeing strongly and 24% agreeing.
 - A quarter of the sample (29%) agreed very strongly and 24% strongly that it was easy to find a childcare but 11% disagreed.
 - Overall, 8% of respondents thought the overall quality and choice of childcare in Bexley was very good and 26% that it was good, 6% thought this fairly poor and 1% very poor. More than half the sample said they did not know.

4.1.5 Paying for childcare

Half of those using childcare (49%) said they paid for it, this equates to just under one in five of all respondents.

- 14% of those using childcare said they received the childcare element of Working Family Tax Credits
- 13% received childcare vouchers from an employer
- 12% said they received a free nursery education place.

4.1.6 Key factors in determining quality

The six factors selected as the most important in determining quality were:

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- Safety and security cited by 94% of respondents.
 - Staff attitude towards children (66%)
 - Ofsted report or registration certificate (51%)
 - Bright happy and warm atmosphere (47%)
 - Attractive premises and cleanliness (46%)
 - Staff training and qualifications (45%)

4.1.7 Reasons for not using childcare

The main reasons for not using childcare was that the respondents did not need childcare (92% of those not using childcare) or that they would prefer to look after their children themselves (63%). One in four (29%) of those not using childcare said it was because their working hours or their partners could fit around the children's needs and 8% did not use childcare because of the cost.

4.1.8 Use of free nursery education for 3-4 year olds

Two in three the respondents with children in the right age group (64%) used all 5 sessions with a further 23% using some of the sessions. 28% of respondents had been offered the opportunity to use these hours in different combinations. 57% said they would take up the extra hours offered from September. 33% said they would not, mainly because their child would be in school, and 10% were not sure.

4.1.9 Demand for childcare

- Just over one in three respondents (39%) said they wanted childcare either now to enable them to start work, remain in work, increase their hours or study or train.
- 47% of respondents want child care in the next twelve months with a further 8% not sure.
- In the next 12 months, 11% of respondents wanted childcare so they could start work or return to work;
- 29% wanted childcare so they could remain in work;
- 5% wanted childcare so they could increase their working hours;
- 4% wanted childcare so they could start or continue training.
- A quarter of those wanting childcare now or in the next twelve months did not know how many hours they would need, with 21% saying up to 10 hours, 11% 11-15 hours and 15% more than 30 hours.
- 38% said they wanted three days or less of childcare and 34% wanted 5 days.
- A quarter of those wanting childcare said they needed it before 8.00am, 17% needed it after 6.00pm and 6% at a weekend.
- Respondents wanted a wide range of types of childcare, with 21% saying a childminder, 24% a nursery, 14% a breakfast club 21% an after school club and 39% family or friends.

4.1.10 Childcare for 11-14 year olds

Respondents favoured activities, sports and youth clubs for this age group after school or in the holidays, i.e. active and fairly structured.

Three in four respondents expressing an opinion said they would like sessions for 11-14 year olds to register the child entering and leaving.

4.1.11 Awareness and knowledge of childcare information and support

- 52% of respondents said they knew who to contact for information about local childcare, with people using childcare being more likely to know than others;
- 47% said they knew where to find good quality childcare locally;
- 33% said they knew who to contact about help with paying for childcare;
- 39% had heard of Bexley's Family Information Service
- 8% had heard of Family Information Direct.

4.2 Parental focus groups

4.2.1 Methodology

Bexley wished to explore in greater detail than is possible in a quantitative survey the views regarding the sufficiency of childcare of certain target parent groups. These six target groups were identified by the research team after a discussion of the initial findings of the parental demand survey with the client team in July 2010.

Teenage parents were selected because there were insufficient responses in the quantitative survey to derive robust conclusions; parents of disabled children (two age ranges) were selected because of a concern identified during the series of semi-structured demand interviews reiterating well-documented national issues for parents of disabled children in accessing suitable childcare; lone parents were selected because Bexley wished to explore the impact of recent welfare reform changes¹¹ and parents in two geographical areas (Thamesmead and Slade Green) which are areas of deprivation with particular geo-demographic features were selected.

Thamesmead is a highly populated area and Slade Green is thought to be an isolated part of the borough where local people had lost a sense of community and serious issues around transport accessibility, congestion and poor local amenities.¹²

¹¹ Parents now have to move to Jobseeker's Allowance when their youngest child reaches the age of seven

¹² Bexley Childcare Sufficiency Assessment demographic text for Cluster 2

4.2.2 Findings

Most parents had a good idea of where to access information about childcare and knew about various options, regulation and inspection. Children's centres, schools and Jobcentre Plus were seen as valuable sources, as well as the internet, and 'the council'. Some felt that Health Visitors were a good source of information, while others were cynical about the lack of Health Visitors in their area.

Parents who had used or were using childcare were positive about how the benefits had helped their children to socialise in preparation for nursery and school. Even those parents adamant that they would not use childcare were nevertheless aware of the benefits of childcare, both for children's development and for their own access to work or training.

Most parents aspired to work or study if they were not doing either of these already. Apart from the need for financial stability, parents felt that working or studying provided their children with positive role models, and built their own self esteem.

About a quarter of parents knew about, or thought they had heard of, Bexley FIS as a brand. Awareness of the FIS was highest among lone parents and parents in the Thamesmead area. Parents of disabled children had little knowledge of the FIS brokerage service.

Anxieties about using childcare were understandably highest among parents of younger children, who were concerned that their children would not be able to articulate any problems in childcare, should they occur. Lack of trust in providers across the range was highest among parents of disabled children, and the young parents. Many parents felt they would stay at home until their child reached nursery or school age because of trust issues.

Parents in Slade Green and Thamesmead, and lone parents had no strong feelings about using a particular type of childcare, as long as they had information about the provider. Some did however have reservations about using a childminder, because of the issue of childminders working 'behind closed doors'

Word of mouth recommendations were critical for all parents and there is still a need to do more work on promoting the benefits of using registered childminders

Parents across the areas were aware of help with childcare costs through WTC and the childcare element. More information is needed about help for students in Further and Higher Education, a particular issue for young parents

Parents felt in the main that there was enough childcare for under-5's, but that there were long waiting lists in the Thamesmead area.

There was a perceived shortage of resources for older school age children, expressed by parents in the Slade Green and Thamesmead areas.

Parents did not feel there was more or less childcare in their area compared to other parts of the borough, apart from parents of disabled children, some of whom felt that there were more resources in Greenwich. This did tie in with a general lack of information about resources expressed by several parents with disabled children

Parents wanted local job opportunities and local childcare. Many were concerned about the large numbers of people applying for jobs, and the fact that qualifications gained didn't seem to matter much to retail and care work employers.

The main barrier to work and training for most parents was the cost of childcare.

Parents of disabled children were especially concerned about the need to train staff to meet a variety of needs. Some felt that parents could be trained as childcare workers. At the very least, childcare workers could be mentored by parents

Parents of disabled children suggested a 'Childcare Champions' initiative, by which parents using childcare and seeing positive outcomes could publicise the benefits of childcare.

4.3 The views of children and young people on their childcare

4.3.1 Methodology

Firstcare was asked by Bexley Council to carry out primary research into children and young people's views on out of school services both at school and in the community.

Firstcare wished to involve young people in the design and delivery of this consultation. Researchers were invited to attend a meeting of the Children's Parliament to get suggestions about questions to ask in a survey. The young people also offered to help distribute the survey in their schools. A format was agreed and 450 surveys were distributed to all schools in the borough coordinated by the Children's Participation and Quality Projects Officer. Each school was asked to find a sample of around 20 children to complete the survey.

The sample was designed to cover key age bands, recognising different developmental stages have different childcare needs. Therefore children under 8 and over 8 in primary schools settings and young people under and over 14 in secondary schools were surveyed.

4.3.2 Findings

278 returns (a 66% response rate) were received from children aged between seven and 16 with a small number (six) received from younger children. These have been included in totals but not in detailed analysis due to the very small numbers.

Nearly everyone said there were out of school hour's clubs and activities at their school and that they had a good choice of things to do - but very few said there was a holiday scheme at school.

Young people were much less likely to say there were out of school clubs and activities near where they lived than at school but more said there were holiday schemes near where they lived. Three quarters said there was a park or playground nearby.

Nearly half of children had been to an after school club in the last six months. Whereas after school clubs were equally used by all age groups, secondary aged children tended to use breakfast clubs far more than those at primary school. Nearly three quarters of children and young people used a play ground or park, especially those under 14 year olds.

Of those that told us why they didn't use out of school clubs and activities the majority said it was because they preferred to be at home, it cost too much or there was 'nothing near me'. Older children aged 12 -16 were far more likely to say there was nothing for their age group. There were some differences between boys and girls. Girls were more likely to say it 'cost too much' and 'worried about travel' whereas boys were more likely to say there was 'nothing near 'or 'nothing they liked to do'.

Those children and young people who used clubs and activities said they went because they enjoyed the activities, that they met their friends there and 'because they wanted to'. Only a tiny number said they had to go because there was no one at home.

A very wide range of suggestions were made for a new club. Cooking was the most popular suggestion from 7-11 year olds for a club. Younger children wanted to be active and able to run around as well as 'make things' whereas older children, 9-11 year olds, wanted to do more organised sports such as football and rugby and things like drama and dancing.

For secondary age young people 12-14 year olds tended to want sports activities including motor sport whilst 14 -16 year olds suggested music and rap music, drama and acting and extreme sports.

There were some differences between boys and girls of all ages with drama, art and dancing suggested more often by girls and sport activities and music more often suggested by boys.

The most important things in a club it was thought, was to have a variety of activities and have fun. The availability of food and drink was also rated highly. They also thought there should be good equipment and teachers, that people should be friendly and that they could meet their friends there.

We then asked where they would go to get information about out of school clubs and activities. Nearly a quarter said they didn't know, a quarter would go to their school or school office and some would use the internet. Friends and family was also a popular source of information.

4.4 FIS enquiries

During a three month period 1st July 2010 to 1st October an analysis of the FIS enquiries¹³ indicates that most of the enquiries come from Cluster 1.

4.5 Neighbouring local authorities

London Borough of Bexley contacted the three neighbouring local authorities: London Boroughs of Greenwich and Bromley and Kent County Council. No response was received from the two London Boroughs and Kent directed the researchers to Kent's 2010 Childcare Sufficiency Assessment which indicated no boundary shortage issues with Kent.

4.6 Views of employers on the sufficiency of affordable childcare in Bexley

4.6.1 Methodology

Government Office for London (GOL) commissioned SERCO to undertake a survey focusing on the needs of London-wide¹⁴ employers' issues and understanding during the period May to July 2010 as part of their support for London's local authorities in their statutory Sufficiency duties. The content for the survey was developed by SERCO and the survey was undertaken through 'Survey Monkey'. 72 Bexley organisations were invited via email to complete the survey via an electronic link. The list of organisations was developed through contacts provided by London Borough of Bexley officers. Additionally, SERCO promoted the survey to London-wide organisations such as Transport for London.

¹³ These were supplied by LBB officer 18/10/2010 and are estimated to be subject to under reporting as they are those calls received by the call centre, referred to FIS and allocated to Clusters.

¹⁴ Additionally SERCO were commissioned to focus on the needs of employers in West London.

4.6.2 Survey respondents

12 organisations with activities in Bexley were received out of 45 across London. Three of these organisations were active London-wide with the remainder focused in the London Borough of Bexley area. Two of the respondent organisations were based in Clusters 1, 2 and 3, one in Cluster 5 and none in Cluster 4.

4.6.3 Findings

The research indicates that a 'typical' 9-5 work pattern is no longer predominant.

- Two thirds of respondents operate a shift pattern (8 out of 12 responses)
- All ask staff to work before 8am and week-ends (9 out of 9 responses)

Most ask staff to work after 8pm (8 out of 9 responses) and Bank Holidays (7 out of 9 responses).

Just over half the organisations responding to the survey offer childcare vouchers and nearly half offer salary sacrifice and information about childcare. Only a quarter reported that they provided no support at all.

Not one of the 12 respondents reported that childcare had presented itself as a barrier to recruitment or retention for the organisation itself.

However, of the nine organisations responding to the question exploring childcare issues for staff, eight thought that cost of childcare was an issue and just over half that 'hours of availability' was also an issue.

4.7 Qualitative demand research - stakeholder interviews

4.7.1 Methodology

Eight interviews were conducted in total with representatives from the following local organisations or groups:

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- Jobcentre Plus
 - London Borough of Bexley - Sustainable Communities and Skills
 - Bexley Voluntary Sector
 - Bexley Primary Care Trust
 - Local Safeguarding Board
 - Further Education representative
 - Organisation supporting families with disabled children
 - Local childcare provider (children's centre)
 - London Borough of Bexley Foster Placement Service

All of the stakeholders had a remit that was Bexley-wide.

Each of the interviewees was offered a confidential semi-structured telephone interview at a time and date of their choosing and received a copy of the proposed interview content in advance. One of the interviewees elected to respond to the survey by email and another directed the researcher to publicly available documents.

4.7.2 Findings

Participants noted the following factors relating to demand for childcare in Bexley:

- Employment pattern changes to part time shift work
- Requirement for more culturally aware provision
- Demand for childcare for children with disabilities
- Shortfall in holiday playschemes and childcare for older children
- Unmet demand for childcare suitable for teenage parents
- Possible impact of reduced public sector budgets on the sustainability of voluntary sector providers

Issues around information about childcare in Bexley focused on the needs of specific groups such as families of disabled children and parents who could not read.

5 Supply of childcare

Quantitative data for this section is derived from that supplied by the client 15 July 2010¹⁵ and other emails. Qualitative data has been derived from a literature review by Firstcare of relevant documents and semi-structured telephone interviews with stakeholders including providers.

5.1 Number of childcare places

There are currently¹⁶ 5,124 childcare places in Bexley of which 3,972 may be particularly suitable for children aged 0-4¹⁷.

This care is provided through the following childcare types:

- 513 childminders (including 32 in an accredited network) providing 2,111 places
- 26 holiday playschemes providing 484 places
- 46 playgroups¹⁸ providing 946 places
- 25 Nurseries¹⁹ providing 915 places
- 32 out of school clubs providing 668 places

5,408 children are offered a free childcare and early learning place by childcare and early learning providers in Bexley (including nursery schools). This represents 93.30% of three year olds and 105.25% of four year olds²⁰.

¹⁵ Additional data was provided by the client to enrich this data over a period August – November 2010 resulting in minor internal inconsistencies within the dataset

¹⁶ Figures provided by LBB officers 15 July 2010

¹⁷ These are childminders, playgroups and nurseries and excludes holiday playschemes and out of school clubs.

¹⁸ Please note that throughout this document the term is used interchangeably with playgroups and preschool playgroups. Please note that preschool playgroups predominantly offer part time places and so may be not be suitable for some parents wishing to work or train.

¹⁹ These are full time care establishments and not to be confused with schools' nurseries

²⁰ Figures provided by interviewees at London Borough of Bexley. This number is due to cross-border anomalies. Figures provided by interviewees at London Borough of Bexley.

5.1.1 Change over time

There has been a net loss of 17 day nursery places during a twelve month period 1st September 2009 until 31st August 2010 caused by the closure of two nurseries (Clusters 1 and 5) and the opening of two in Clusters 2 and 5.

Two preschools have closed in the same period (Clusters 1 and 4) resulting in a net loss of 52 places.

5.2 Childcare at times parents require

5.2.1 Maximum length of time that childcare providers will care for children in a day

Eight childminders offer overnight care (Cluster 1, 2 and 5 only).

In the main, childminders hours vary between 6.00am - 10.00pm and childminders will provide care within these times according to parental demand and personal wishes.

One day nursery²¹ in Cluster 5 offers care from 6.50 am to 7.00pm. For the rest, the maximum time that Bexley's day nurseries offer care is from 7.30 am until 6.30 pm.

5.2.2 Flexibility in catering for irregular patterns of usage across the day, the week or the year

Day nurseries

In Clusters 2, 4 and 5 one day nursery offers provision 52 weeks of the year.

Preschools

All preschools offer care across 38 weeks (term time) except one preschool in Cluster 1, which offers provision over 40 weeks.

Childminders

Childminders offer flexible care in negotiation with parents according to individual circumstances.

²¹ This is the workplace day nursery at St Mary's Hospital

Childminders linked to particular schools

Childminders are not formally linked to particular schools in Bexley. However, as part of the extended services core offer all schools are made aware of the childcare options available within their catchment area and at Cluster level through a database and that the FIS have the most up to date information of local childcare availability.

5.2.3 Out of school care

100% of Bexley's schools are meeting the core offer for childcare as regards extended schools. The core offer requires all primary and special schools to offer access to high-quality, Ofsted-registered childcare from 8am to 6pm (depending on demand), five days a week, 48 weeks a year. Secondary schools do not have to offer formal childcare, although some choose to do so to support families or enable parents to use other extended services.

5.3 Childcare suitable for children with a disability or other requirement

All of the childcare in Bexley is stated as being inclusive inline with DDA legislation.

5.3.1 Provision of childcare by childminders for children with disabilities.

Childminders on Bexley's Childminder Network have a range of different skills/ abilities. Under the terms of the childminder network agreement, all of the network childminders are required to take a referral if they have a vacancy. However, the actual care they are able to offer is dependent on the needs of the child and his or her parents and the individual availability of each childminder when the request arises.

5.3.2 Provision of emergency childcare

Childminders on the Childminder Network are required to accept referrals (such as short term social services referrals) if they have a vacancy, dependent upon the accessibility issues.

5.4 Cost and affordability of childcare

The range of costs by session for preschool playgroups in Bexley is £4.00 in Cluster 1 to £12.00 a session in Cluster 3.

For day nurseries (youngest age group) the range is £153.00 a week (Cluster 1) to £255.80 a week (Cluster 4).

The typical hourly cost for childminders in Bexley is between £3.50 and £4.00 an hour or £30 to £35 a day.

5.5 Free childcare: free and flexible entitlement (3 and 4 year olds)

Bexley's three and four year olds are eligible for 15 hours of funded part-time pre-school, school nursery or daycare nursery place from the beginning of the term after their third birthday, known as the Nursery Education grant or NEG.

The funded places are available in school nurseries, in pre-school playgroups, in daycare nurseries run by private, voluntary or independent organisations (also known as PVI providers) and also with accredited childminders who belong to the Bexley Childminding Network.

Whilst the majority of schools will offer 15 hours, this will not be offered to families flexibly in the term starting September 2010. Bexley schools have transitional protection for 2010-11.

5.6 Two year old pilot

At the time of the research (May 2010), 81 of the 83 funded two year old pilot places were taken up by Bexley families. Parents are offered a choice of provider (network childminder, preschool or day nursery) where there are sufficient places for an appropriate age range.

5.7 Quality of childcare

Ofsted reporting on the quality and effectiveness of childcare in Bexley shows a picture that is above the national average by most indicators.

A recent (2010) audit of full daycare settings and pre-schools within the borough undertaken by the Early Years Training Team showed that of those responding (57 settings representing 613 staff) just around two thirds (64%) of the workforce was qualified to level 3 or above.

The childminders in Bexley's childminding network are of a very high quality in terms of training and qualifications. Three of them are currently studying for their early years' foundation degree. 14 out of 32 are judged by Ofsted as 'outstanding', the rest are all 'good'.

Childminding in Bexley is seen as a platform to allow parents to gain skills while children are at school so can go on afterwards to other careers. There is a natural cycle for childminders who reach a certain time in their career/family arrangements and so go on to work in a nursery, or other professions such as social work, midwifery, or leave the borough.

5.8 The providers' perspective

The main issues noted by interviewees were around sustainability, with the poor economic climate leading to a downturn in demand seen as the most important.

6 Gap analysis

6.1 Calculating shortages in places

There are a number of issues to take into account when attempting to calculate sufficiency and estimating numbers of childcare places required in a population.

Firstly one childcare place may serve more than one child e.g. two children occupying a place at different times of the day or days in a week. One child may also take more than one place e.g. a place in a out of school club and a holiday scheme. Secondly future demand identified in parental surveys or focus groups is often found to be higher than actual take up.

The figures in this document must therefore be used with caution when preparing an action plan to address reported shortages.

6.2 Possible gaps in childcare provision in Bexley

Areas of potential shortage of childcare

One in ten or 11% of 707 respondents to a borough-wide parental survey did not agree that it was 'easy to find a childcare place'.

Extrapolated estimates from parental survey indicate 1,403 households reported that they want formal childcare now (June 2010) with day nurseries being the most cited preference (35% of total).

Extrapolated estimates from parental survey indicate 2,436 households reported that they want formal childcare in the next 12 months (July 2010 – June 2011) with day nurseries being the most cited preference (48% of total).

Cluster 2 has the lowest number of childcare places per head of 0-14 child population (1: 11). This situation could worsen over the next years as Cluster 2 will host the second highest number of new housing units by cluster in the borough (671 planned between 2010 and 2015) and is also undergoing significant regeneration initiatives.

Respondents in Cluster areas 3, 4 and 5 were slightly more likely to use paid for forms of childcare such as nurseries, after school clubs or childminders and were most likely to pay for childcare suggesting demand may be higher in those areas.

Gaps in provision for children of particular age group

There is a reported shortage of two year old places in group daycare provision for the two year old pilot and a shortage of accredited childminders in Clusters 3,4 and 5 who can offer NEG funded provision.

Parents in the Thamesmead area (Cluster 1) report a lack of under-fives provision and in Slade Green area (Cluster 2) a lack of provision for school age children, in particular holiday care.

This reflects a more general picture of shortages in provision for school age children – both holiday and out of school care. 12 -16 year olds in particular noted that there was little appropriate provision for them and children aged 9- 14 wanted more organised sports activities.

It is estimated that the 5-7 year old population in Bexley will rise between 2011 and 2014 by around 9% which may create additional demand on registered out of school provision. In addition changes in the benefit system now require lone parents with a youngest child of seven to seek work.

Gaps in affordable childcare

8% of respondents to parental survey cited affordability as a barrier to use of childcare. Parents from Slade Green and Thamesmead (where focus groups held) reiterated this view.

Holiday playschemes were seen as too expensive.

Employers cited cost of childcare as an issue for their staff.

There is a gap in funding for participants in further and higher education. More generally parents do not always understand what childcare subsidies and funding are available.

Gaps in suitable childcare for children with a disability or other requirement

Parents noted a general lack of suitable childcare for disabled children of all ages for all time periods including secondary school children. The lack of relevant up to date information about support and funding options was reported as an issue.

There is an emerging requirement for provision that is 'culturally aware' for the needs of different ethnic groups, in particular black African families. This is of particular relevance to Cluster 1 where 29% of primary age children do not have English as a first language.

There is insufficient childcare and childcare funding for participants in further and higher education.

Shortage of childcare at times parents require

15% of parents surveyed mentioned that the number of hours provided through the free offer was not long enough²².

There is not enough provision for out of school care and local clubs, activities where people live and holiday schemes attached to schools.

Childcare ratios per registered childcare place

Cluster	Children aged 0-14	Children 0-4	Children 5-7
1	7.21	3.49	7.32
2	11.07	5.19	13.26
3	7.97	3.51	5.92
4	7.01	3.28	5.60
5	6.52	3.05	5.04
Bexley	7.87	3.7	7.47

²² These parents may have been accessing the 12 ½ hour offer which since September 2010 has increased to 15 hours a week.