

Brent Childcare Sufficiency Assessment (CSA)

July 2018 – July 2021



CONTENTS

| | |
|--|-----------|
| Foreword from Lead Member for Children's Safeguarding, Early Help and Social Care | 3 |
| 1 Overall assessment and summary | 4 |
| 2 Demand for childcare | 7 |
| 3 Supply of childcare | 13 |
| 4 Funded early education | 26 |
| 5 Prices | 33 |
| 6 Quality of childcare in our area | 36 |
| 7 Parents and providers views of sufficiency of childcare in our local area | 40 |
| 8 Methodology | 41 |
| Appendices | 42 |

Foreword

Brent Council is committed to supporting families to access their entitlement to childcare. We work in partnership with childcare providers to continue to improve the quality of childcare provision with the aim of ensuring that all children have access to the highest quality provision.

This Brent Childcare Sufficiency Assessment 2018 aims to give an overview of the current childcare market in Brent including supply and demand. The assessment includes parental views on their experiences of accessing childcare. We have had high response rates from families who wanted to share their views on the supply of childcare in the borough and we are very grateful to everyone who took the time to provide feedback.

The findings of this assessment will be used to plan best use of services going forward. The Childcare Sufficiency Action plan will respond to the areas of need identified in this analysis and allow services to be prioritised to address gaps in the market and to promote entitlements to generate increased demand for childcare places.

Councillor Mili Patel

Lead Member for Children's Safeguarding, Early Help and Social Care

1. Overall assessment and summary

Under the Childcare Act 2006 local authorities are obliged to secure sufficient childcare, so far as is reasonably practicable, for working parents or parents who are studying or training for employment, for children aged 0-19 (or up to 25 for disabled children); and secure sufficient free early education places for every eligible two year old and for every three and four year old in their area from the relevant date.

In Brent, these duties sit with the Early Help Service within the Children and Young People Department. Early years childcare in Brent is delivered via a mixed economy of provision through private, voluntary and independent (PVI) childcare providers, childminders and maintained settings including nursery classes in schools and stand-alone nursery schools. Providers are supported by Brent Council to deliver high quality childcare places enabling children to have the best start in life. To that end, Brent's Early Years and Childcare Plan 2017-2020 identifies key strands of work in supporting continued improvements in the access to and quality of childcare in Brent:

Priority one: Ensure childcare is available which meets the needs of families

Priority two: Ensure children have the best possible start

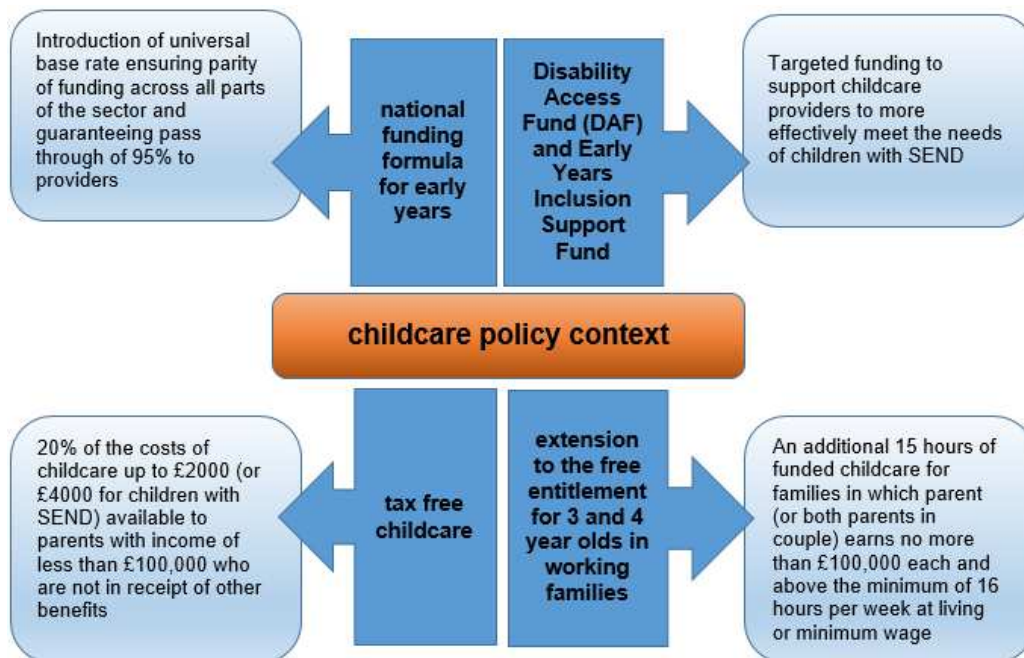
Priority three: Improve support to children with special education needs or disabilities

Priority four: Ensure parents are supported in obtaining and maintaining employment

The Childcare Sufficiency Assessment provides an opportunity to examine current patterns of supply and demand for childcare in order to assess our progress against these priority areas. This assessment was conducted between January and April 2018 using take-up figures from Spring Census and parental feedback gathered in this period. The structure of the assessment reflects the template provided by the Greater London Authority incorporating a number of new focus areas since the last assessment. Alongside this and since the last Childcare Sufficiency Assessment in 2016 there have been significant changes to the childcare offer and funding for childcare.

The policy context

The following changes continue to impact on childcare providers' sources of funding and the demand for childcare from families in Brent. Both the introduction of tax-free childcare and the extension of the free entitlement for working families aim to increase the access to affordable childcare for families. The universal base rate and Disability Access Fund are supplier side funding streams to enable sustainable delivery of the entitlements while meeting the needs of children with special educational needs and disabilities.



Summary of methodology

Since the previous sufficiency assessment, significant improvements have been made regarding the specificity of data available on access to free entitlements to early education in Brent. Ward mapping has been introduced and this has allowed more detailed analysis of take up in ward areas.

Supply

Since the 2016 assessment, there has been a rise in the number of PVI providers in the borough and a reduction in places in maintained and childminder provision. There is under-fives provision across all ward areas in terms of provision type with 343 providers offering childcare places for 0-5s. There are however variances across ward areas in the registered place capacity of providers with a difference of 626 registered places between the ward with the greatest and fewest places. There is a balance of free entitlement places being delivered across different setting types with 45% of free

entitlement places for three and four year olds being delivered in maintained settings and the remainder being delivered across a mixture of PVI and childminding settings. Alongside this, overall quality of provision has increased with 96% of providers across the sector now judged as good or outstanding by Ofsted. This increase in quality is echoed by parental feedback with 92% of parents either agreeing or strongly agreeing that the quality of provision is good.

Provision for school aged children is largely delivered on site at school settings with many schools running a system of clubs rather than formal childcare provision. Registered childcare for school aged children is less consistently available across the borough with 5 ward areas having no before school provision, 3 having no after school provision and over half of ward areas having no holiday provision in ward.

Demand

Figures on take up of the free entitlements for 2, 3 and 4 year olds are provided to local authorities by the Department for Education (DfE) on an annual basis in the summer of each year based on January census returns. The last release of these figures (June 2017) indicated take up in Brent as at January 2017 was 80% for 3 and 4 year olds. Take up of free entitlement provision for 3 and 4 year olds in Brent has declined for the last 3 years mirroring a London-wide decline. England averages for take up have been consistent at 95% for 3 and 4 year olds since 2012. In contrast, the June 2017 release of figures from the DoE showed take up of two year old free entitlement places increased from 45% in 2015 to 59% as at January 2017. Childcare places delivered for under 2s and over 2s not claiming free entitlements are not captured in headcount information nor is this information currently collected from providers.

This assessment of Brent's childcare sufficiency indicates that there is a high volume of vacancies across the borough with 1840 reported across the sector inclusive of vacancies for all age ranges for PVIs and childminders and 3 and 4 year old vacancies for providers in the maintained sector. This equates to a vacancy rate of 22% based on the total number of places for which providers are registered.

Plans for childcare in Brent

Going forward, the focus will continue to be on delivery against the four priority areas set out in the Brent Early Years and Childcare Plan 2017-2020

Priority one: Ensure childcare is available which meets the needs of families

Priority two: Ensure children have the best possible start

Priority three: Improve support to children with special education needs or disabilities

Priority four: Ensure parents are supported in obtaining and maintaining employment

The Childcare Sufficiency Action plan will be developed under these priorities and will be aligned with the School Place Planning Strategy 2019-2023. This will include efforts to continue to increase take up for all free entitlements through outreach in ward areas. Alongside this, engagement of employers will aim to continue to develop family-friendly working practices. There will be targeted support to improve the quality of early years provision specifically to increase attainment for all. The assessment also indicates that some families will continue to have a preference for informal childcare delivered by family members and so resources will be targeted to support home learning.

2. Demand for childcare

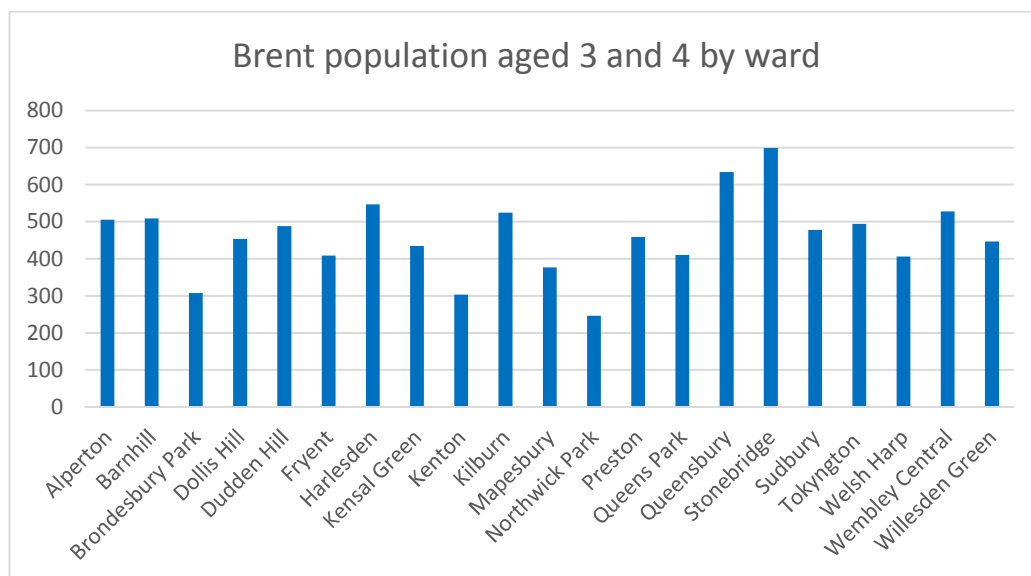
Population of early years children

GLA projections for the year 2018 (based on GLA 2016-based Demographic Projections, 2017) indicate there are 24700 children under the age of five living in the local authority. A breakdown of 3 and 4 year olds within this population is included in Figure 1. These children may require early years childcare.

| Age | Number of children |
|--------|--------------------|
| Age 0 | 5,100 |
| Age 1 | 5,000 |
| Age 2 | 4,900 |
| Age 3 | 4,900 |
| Age 4* | 4,800 |

* Some four year olds will have started reception

Figure 1: Age 3 and 4 population by ward



Source - GLA projections for the year 2018 (based on GLA 2016-based Demographic Projections, 2017)

Of the 21 wards in Brent, the three wards with the highest population of 3 and 4 years olds are;

- Stonebridge – 699
- Queensbury – 634
- Harlesden - 547

The three wards with the lowest population of 3 and 4 years olds are;

- Northwick Park - 246
- Kenton – 303
- Brondesbury Park - 308

Population of school age children

GLA projections for the year 2018 (based on GLA 2016-based Demographic Projections, 2017) indicate that there are 31,600 children aged 5-11, and 11,400 children aged 12-14 living in our local authority. These children may require childcare before and after school, and/or during the school holidays.

| Age | Number of children |
|--------|--------------------|
| Age 5 | 4,800 |
| Age 6 | 5,000 |
| Age 7 | 4,700 |
| Age 8 | 4,500 |
| Age 9 | 4,300 |
| Age 10 | 4,200 |
| Age 11 | 4,100 |
| Age 12 | 4,000 |
| Age 13 | 3,700 |
| Age 14 | 3,700 |

Number of children with special educational needs and disabilities

Children with special educational needs and disabilities (SEND) are entitled to support with childcare up to the age of 18 (age 14 for children who do not have a special need or disability). The number of children with an Education, Health and Care (EHC) plan in our local authority as at January 2018 is as follows:

| Age | Number of children |
|---|--------------------|
| Birth to school age | 14 |
| Primary school (reception to year six) | 1010 |
| Secondary school (year seven to thirteen) | 833 |

Children's needs change over time and are identified at different ages. Among the youngest children, SEND may only be identified when they start in childcare or school, and it can take some time from problems being identified to an EHC plan being issued. Some children have SEND but do not have an EHC plan.

As at January 2018, statutory notification (ie. notification from paediatric services to local authority of newly identified children with SEND) had been received for 224 children under statutory school age. Of these 207 children were in settings and 17 not currently accessing provision. 15 of these children were under 2 years of age so would not yet be entitled to funded provision. There were 389 children on the Early Years Inclusion Support Team case load – all were in places in PVI or childminding settings. In addition to this there were 143 children accessing places via specialist nurseries. There were 24 children on the portage (ie home visiting service for families with children with SEND) case load at this time and 4 on the waiting list.

The Disability Access Fund (DAF) was introduced in September 2017 and 35 children across PVI and maintained settings have accessed this entitlement. There is significant action planned both to promote this entitlement to settings (to ensure that families where children are in receipt of DLA are made aware of the entitlement) and also to work with families who may be entitled to DLA to ensure they apply and thus become eligible for DAF.

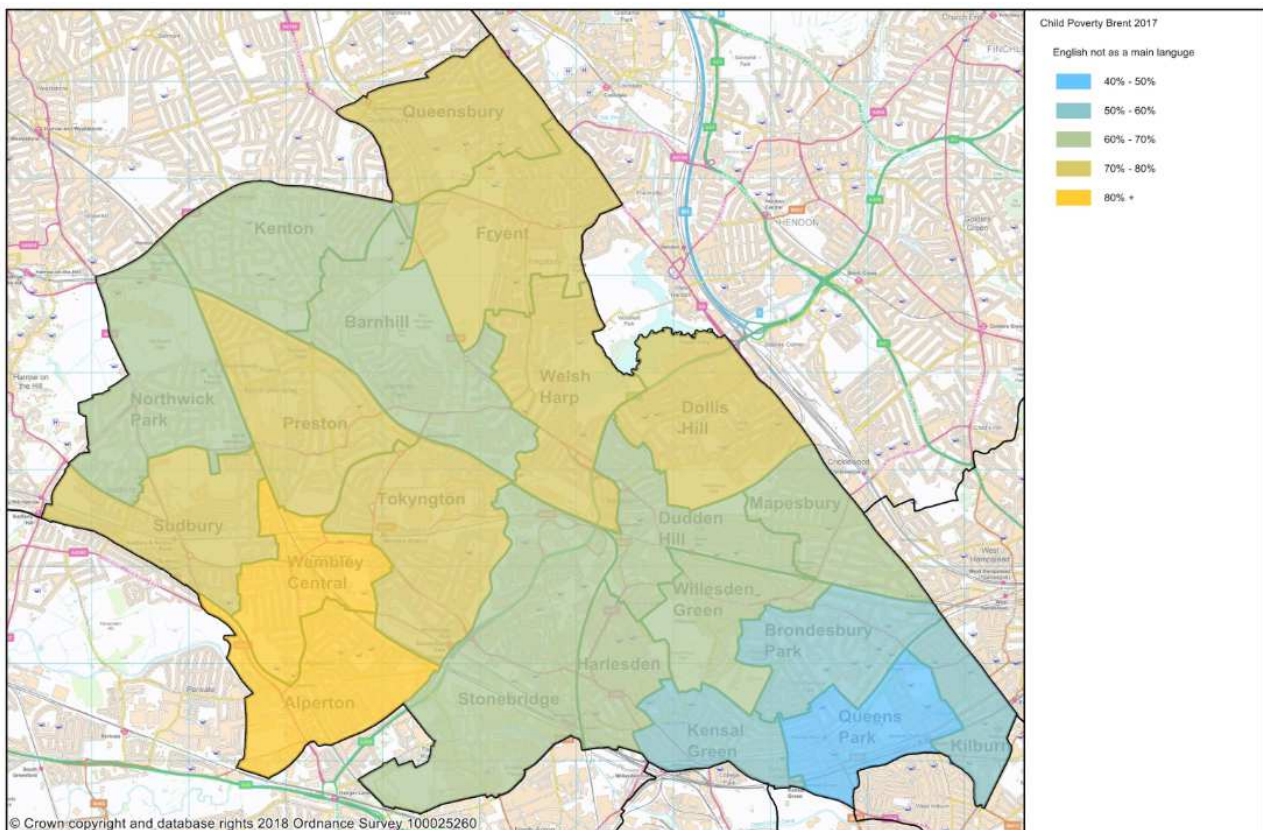
There is an incomplete picture around numbers of children with SEND in maintained provision with some schools providing this information via Schools Census returns. The local authority does not currently hold information on children accessing services directly from health. Working with these partners will be a key area of focus in the next year to enable a full analysis of sufficiency of places for the youngest children with SEND in Brent.

Characteristics of children in our area

The 2011 Census recorded that 64% of the total population of Brent is Black, Asian or Minority Ethnic (BAME). This is the second highest proportion in England and Wales. There are 149 languages

spoken in Brent with 63% of the population speaking English as their home language. In 1 in 5 households nobody speaks English as their home language. 30% of primary school pupils and 42% of secondary school pupils speak English as their main language. 75% of babies born in Brent were to mothers born outside the UK. The language profile of children attending Brent schools is illustrated below (Figure 2) and indicates that in Wembley Central and Alperton wards, over 80% of children attending primary school have English as an additional language. The figure reduces to between 40-50% in Queens Park ward. This illustrates a potential need to continue to review marketing of the childcare offer to ensure it is tailored to meet the needs of families with English as an additional language.

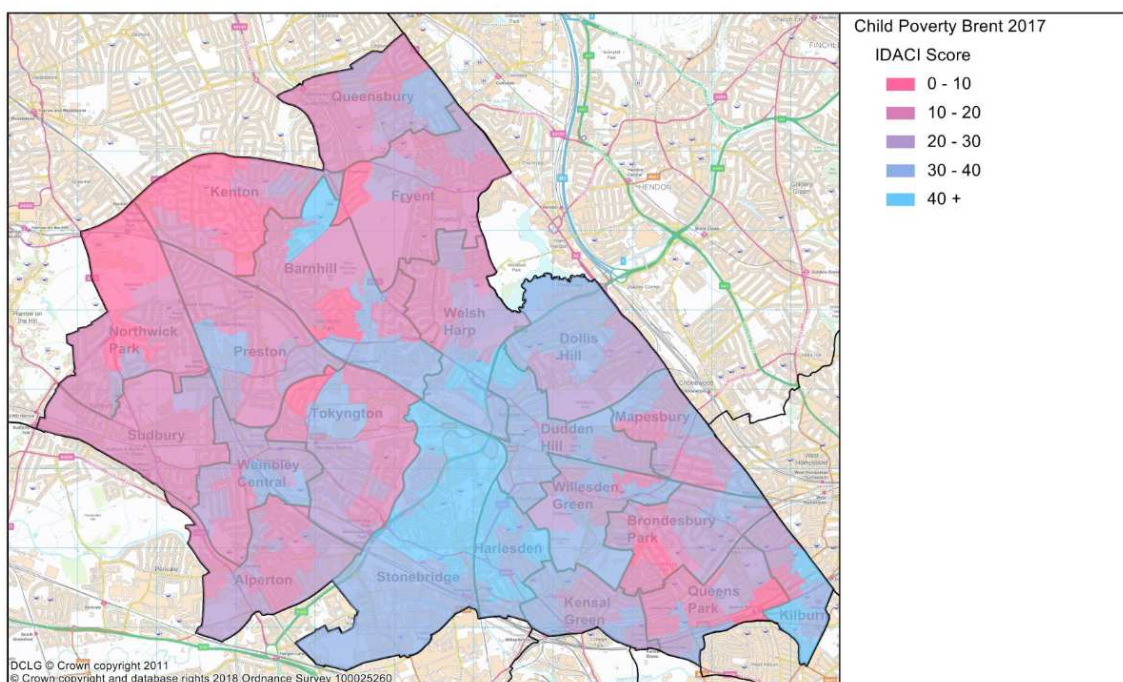
Figure 2: Schools Census English as an additional language



The 2018 Schools Census also indicated that 10.3% of Brent maintained nursery and primary pupils are eligible for free school meals. This is lower than the outer London (12.4%) and national (13.7%) averages. Nevertheless, Figure 3 on the following page indicates there remain large areas of the borough where income deprivation is affecting children (as measured through the Income Deprivation Affecting Children Index). Whilst generally higher levels of deprivation are found in the central and south of the borough, there are pockets of deprivation across all wards. This has

implications for parental capacity to meet the costs of childcare and also affects potential demand for childcare with some families on lower incomes having one or both parents not in employment.

Figure 3: Income deprivation affecting children index (IDACI)



The Early Years Pupil Premium is paid to settings who care for children in households on lower incomes. The rates of take up for this premium peaked at 625 in 2016-2017 and declined considerably in 2017-2018. This may be reflective of reducing levels of deprivation in the borough. Alternatively this may be indicative of a lack of awareness of the offer or a reluctance on either the part of providers or parents to submit application for this funding.

Early Years Pupil Premium take up

| Year | Children accessing via PVI setting | Children accessing via School setting | Total children in receipt of EYPP |
|-----------|------------------------------------|---------------------------------------|-----------------------------------|
| 2015-2016 | 221 | 319 | 540 |
| 2016-2017 | 179 | 446 | 625 |
| 2017-2018 | 164 | 326 | 490 |

Changes to population of children in our area

The Childcare Sufficiency Assessment 2016 identified (using North West London Healthcare Trust data) 21,708 0-4 year olds in Brent in 2014. Current figures reflect an increase of 3192 since the previous CSA. This figure is not reflected in feedback from early years settings including schools who report decreasing levels of demand year on year since 2015.

There is some anecdotal feedback that reduced demand may be due in part to Welfare Reform. Of those who have been accepted as homeless, approximately 60% of all households are homeless due to evictions from the private rented sector, linked to affordability issues, and Welfare Reform. In the period 2015-2018, 375 Brent households were made a Private Rented Sector Offer (PRSO) out of borough and 288 were moved within borough. It is not possible to provide figures on what number of these families had children under 5 and/or to identify the level of impact that these figures may have had on take-up and vacancy levels in childcare settings.

3. Supply of childcare

The figures below illustrate the spread of provision across the borough and illustrate the variance of number of providers across ward areas. While some families are willing to travel to access their preferred provider, for many location is a key determinant of preferred provision. The Brent Childcare Survey 2018 identifies that over 95% of parents recognised proximity to home as an important factor in choosing childcare. Proximity to work was a factor for only 51% of respondents. Willesden, Harlesden and Wembley (54%) parents/carers were most likely to report having childcare close to work was important compared with 33% of Kilburn parents/carers (the least likely). To that end, a spread of provision across the borough so that families in all ward areas can make use of provision locally is a priority.

There is childcare provision for under-fives in all provider types in all ward areas in the borough. This is illustrated in Figures 4 and 5 on the following pages. The largest number of providers are found in Harlesden ward with high numbers of settings across all provision types. Preston and Stonebridge wards have the 2nd and 3rd largest number of providers. The smallest number of settings are found in Alperton, Sudbury and Mapesbury wards. Figure 5 highlights the variance between ward areas in terms of places from 235 places in Dollis Hill to 861 in Preston. According to the Brent Childcare Survey 2018, 85% of parents agree that they can find childcare in a suitable location compared with 72% in the previous assessment.

Figure 4: Childcare provision in Brent

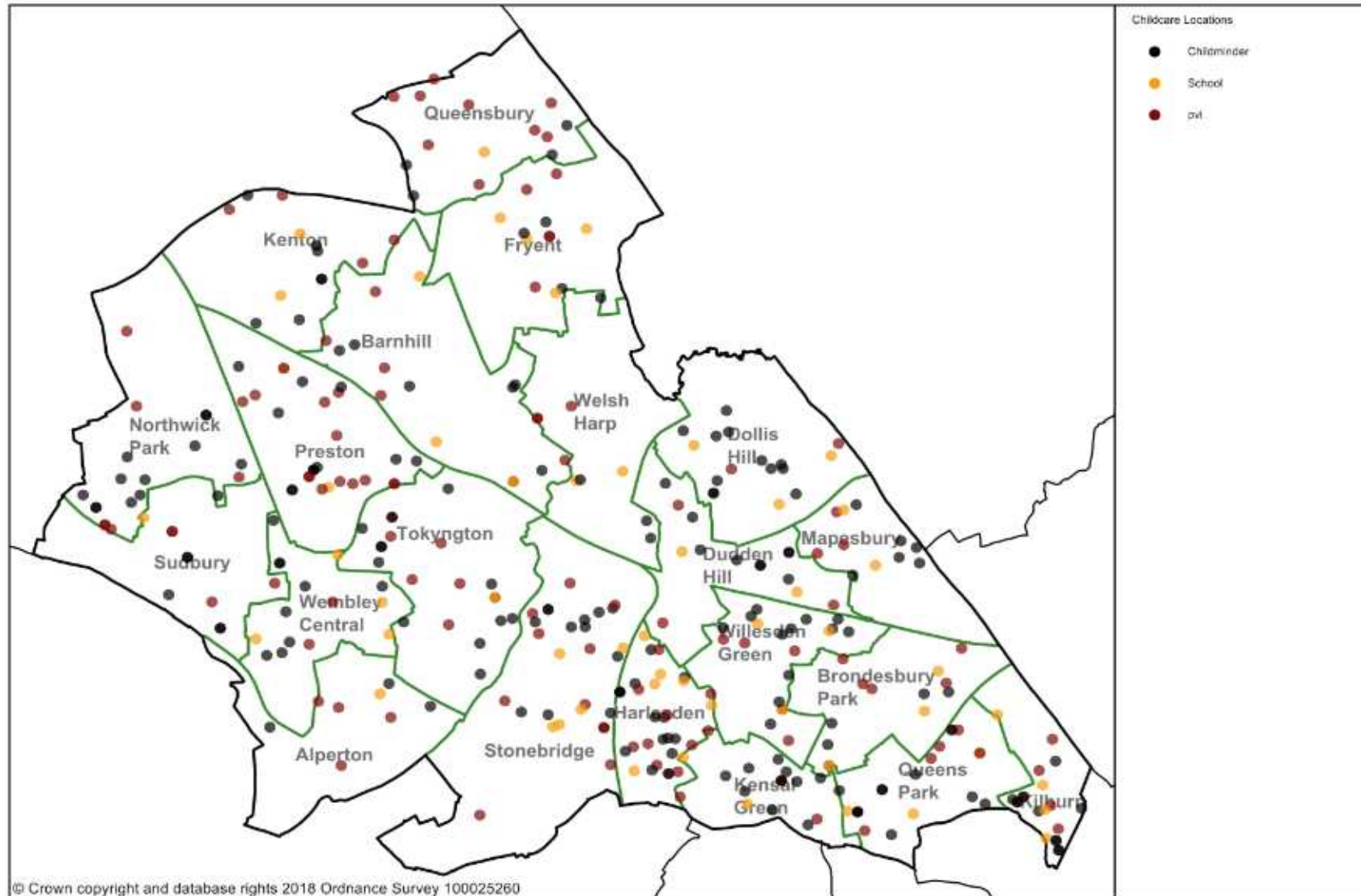
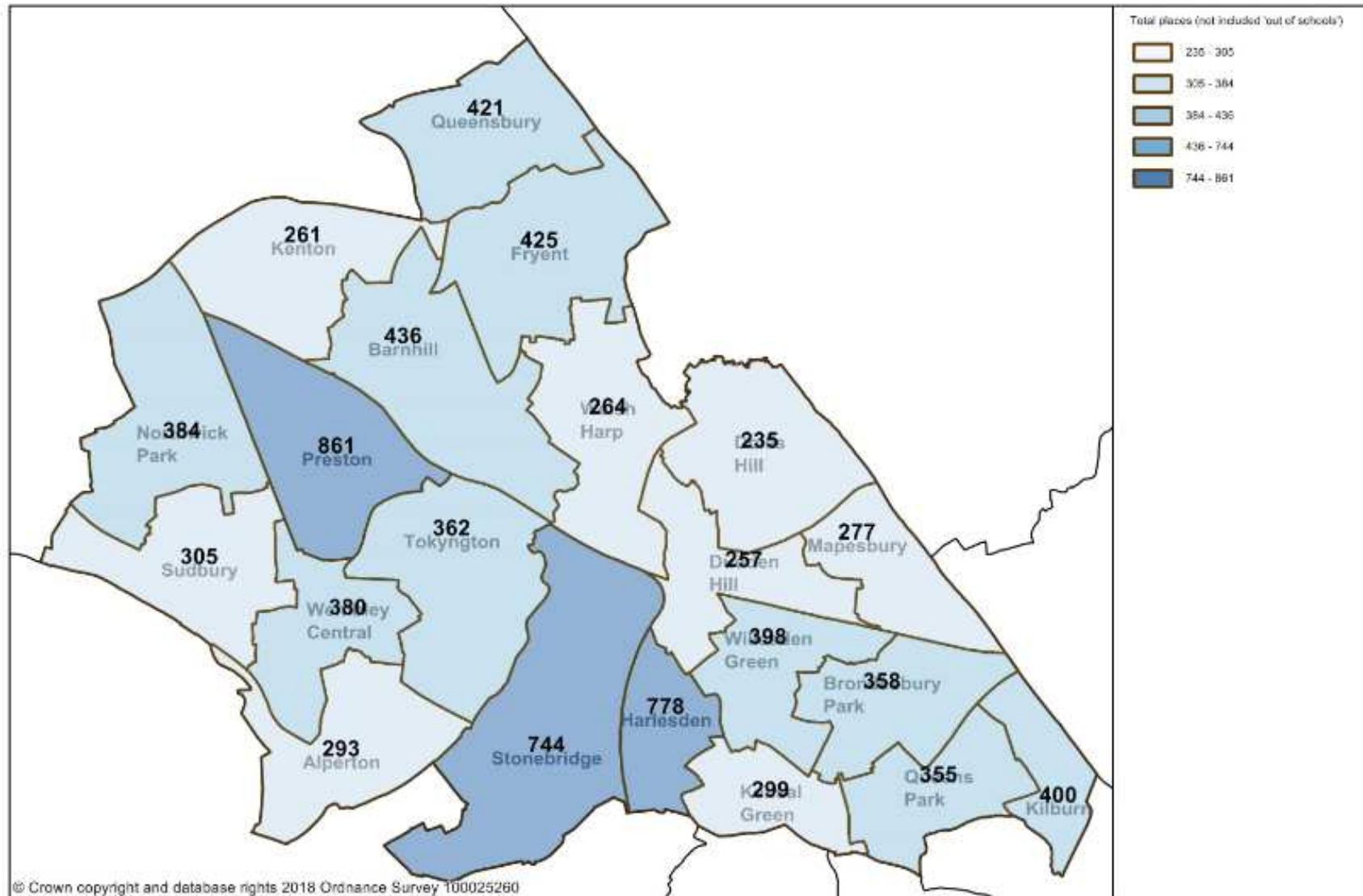


Figure 5: Distribution of childcare places in Brent



Number of early years providers and places

In total, there are 342 early years childcare providers in our local authority, offering 8323 childcare places:

| <i>Type of provision</i> | <i>2018 Number of providers</i> | <i>2018 Number of registered places</i> | <i>2015 Number of providers</i> | <i>2015 Number of registered places</i> |
|--|---|---|---|---|
| Childminders* | 172 | 523 (with 993 for older children) | 190 | 1540 |
| Nursery classes in schools | 51 | 2436 | 50 | 2910 |
| Maintained nursery schools | 4 | 287 | | |
| Private, voluntary and independent nurseries | 115 | 5077 | 91 | 4186 |
| Total | 342 | 8323 (9346 including all childminder registrations) | 331 | 8636 |

The data in this table was correct as at 31 March 2018:

* Some childminder places may also be available for older children. 2015 figures were reported based on the total places offered by childminders and 2018 figures include a breakdown.

For private, voluntary and independent nurseries and childminders, the number of registered places represents the maximum number of children who can be on the premises at any given time. In practice, many providers choose to operate below their number of registered places.

Children may attend childcare full time or part time. This table records number of places for which a provider is registered. In some cases, two or more children attending part time may use one full time equivalent place. For example, one child may attend in the morning and one child may attend in the afternoon.

The 2016 Brent Childcare Sufficiency Assessment reported a 2% growth in childcare places between 2013 and 2015. Places in the maintained sector have reduced by approximately 200. Conversely places offered in PVI settings have increased by almost 900. The refreshed statistics reflect a change in mapping of provision with Children's Centre provision no longer counted separately. Since 2015, one children's centre with nursery school has reverted to a stand-alone nursery school with the children's centre remaining on the adjacent site.

Business sustainability

In Brent there has been a decrease in the number of childminder providers in the borough. The Family and Childcare Trust¹ identify that childminder numbers in London fell by 30% between March 2008 and March 2017. The research identified that former childminders attributed their decision to cease their business to three main factors: paperwork and regulation, relationship with Ofsted and lack of guidance and support. The research hypothesises that while not a factor in the decision of the childminders in question to resign, rising costs of living (including premises) may be contributing to lower numbers of new registrations. This is reflected in local figures with high enquiry rates for childminding and limited conversions from these enquiries to registration.

Conversely, since the last assessment, Brent has seen a 22% increase in the number of places offered in the PVI sector. This is despite reported cost pressures on this sector and limited physical space in which to offer provision in the borough. Of the PVI settings that closed in the period, two have reported that this was a result of low numbers of children.

Vacancy information

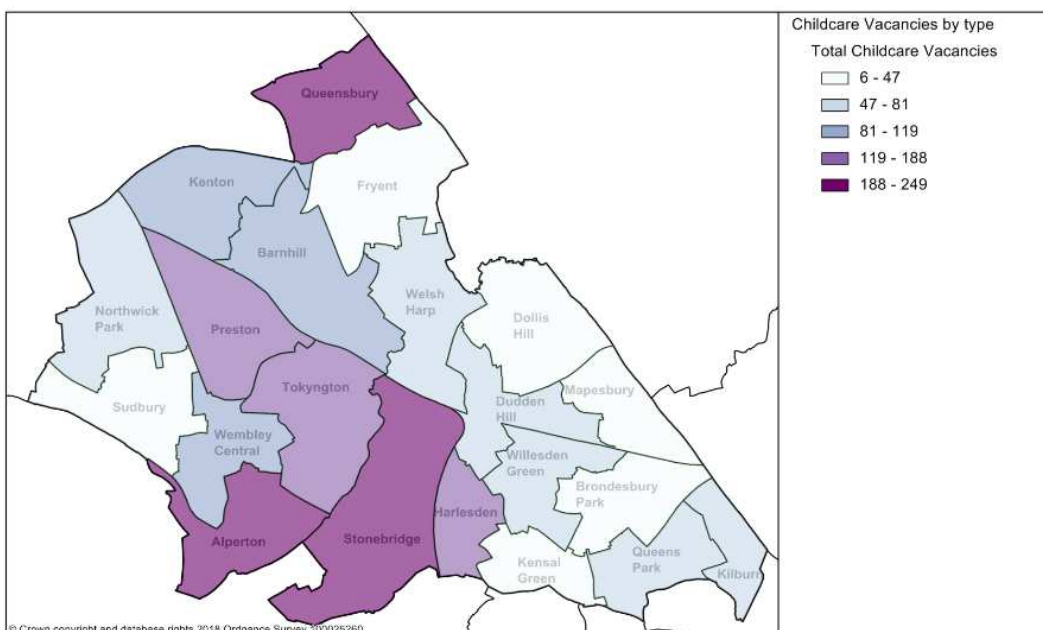
| <i>Type of provision</i> | <i>Number of providers</i> | <i>Total number of vacancies</i> |
|--|----------------------------|--|
| Childminders | 172 | 77 (based on 30% of providers returning figures) |
| Nursery classes in schools | 51 | 439 (based on 87% of providers returning figures) |
| Maintained nursery schools | 4 | |
| Private, voluntary and independent nurseries | 115 | 1324 (based on 63% of providers returning figures) |

¹ **Experiences of former childminders in London Report for the Greater London Authority (March 2018)** *Family and Childcare Trust Sam Shorto and Alexandra Landes*

In previous sufficiency assessments, it has not been possible to report on the number of vacancies in the borough. Vacancy rates are a snapshot, and often change rapidly. In some cases, providers may have a vacancy which is only available for a specific age group, or for a particular part time arrangement. All group childcare settings are now encouraged to return vacancy information at head count so the high number of vacancies shown may be reflective of this. Whilst childminders are encouraged to submit vacancy figures so that this information can be provided to parents on a termly basis, not all childminders take up this offer. Analysis in March 2018 indicated that of those settings that returned data 38 childminders, 8 schools and 19 PVI settings had zero vacancies.

As Figure 6 illustrates, all wards in the borough have at least some childcare vacancies. There are fewer childcare providers reporting vacancies in the south east of the borough with highest levels of vacancies in Alperton, Stonebridge and Queensbury wards. The detail below illustrates variance across borough although individual provider vacancies have a considerable impact on these figures. One provider alone reported that they had had 149 vacancies across the 0-5 age range. Work is being carried out with providers and parents to explore the reasons for high vacancy rates in some parts of the borough. This work will form part of the Childcare Sufficiency Action Plan and will include analysis of vacancy patterns with providers and exploring the reasons why parents choose not to use formal childcare.

Figure 6: Vacancy information by ward



Early years atypical hours

Childcare is most commonly delivered during the typical working day – between 8am and 6pm on weekdays. Some parents require childcare outside these times in order to fit with their work or other responsibilities.

The number of providers offering early years childcare for atypical hours in our local authority is:

| <i>Type of provision</i> | <i>Number of providers</i> | <i>Available before 8am weekdays</i> | <i>Available after 6pm weekdays</i> | <i>Available weekends²</i> |
|--|----------------------------|--------------------------------------|-------------------------------------|---------------------------------------|
| Childminders | 172 | 61 | 47 | 23 |
| Nursery classes in schools | 51 | 0 | 0 | 0 |
| Maintained nursery schools | 4 | 0 | 0 | 0 |
| Private, voluntary and independent nurseries | 115 | 16 | 9 | 0 |

The data above reflects the fact that there is no provision offered by maintained providers either before 8am or after 6pm weekdays or at any time at weekends. Appendix C illustrates this information in map form identifying the pattern of atypical hours provision across the borough. Where private, voluntary and independent nursery providers indicated that they were open after 6pm, this was typically only until 6.30pm or 7pm at the latest. Provision available for parents needing childcare outside of these hours is limited to that at childminding settings and this is the only provision available at weekends. There are 8 ward areas where no weekend provision is available.

The Brent flexible childminder pool continues to operate. This pool of childminders has indicated that they will offer short notice, overnight, weekend and/or atypical hours provision. Arrangements for use of this support are typically made directly between parent and childminder and we estimate that approximately 60 families have used this support in the last year. The Council also offers brokerage support to match families with childcare to meet their needs. This support was delivered for 13 families accessing the childcare via the flexible pool in the 2015-2018 period. This included for example, overnight childcare to enable parents to access emergency medical treatment and short notice childcare for families on child protection plans to attend training as part of these plans.

² This includes availability at any time during the weekend, not necessarily for the whole weekend

Number of school age providers and places

In total, there are 80 providers of childcare for school age children during term time, and 15 providers of childcare for school age children during the holidays.

| <i>Type of provision</i> | <i>Number of providers</i> | <i>Number of registered places</i> |
|--------------------------------------|----------------------------|------------------------------------|
| Breakfast club – primary school | 43 | 1285 |
| After-school club – primary school | 35 | 1250 |
| Breakfast club – secondary school | 3 | 50 |
| After-school club – secondary school | 0 | 0 |
| Childminders | 172 | 995 |
| Holiday club | 15 | 442 |

Tracking supply of childcare for school age children is difficult because not all of this type of provision is registered with Ofsted. It is possible that we have under-counted the provision of breakfast and afterschool clubs and holiday clubs.

The distribution of out of school providers is shown in Figures 7, 8 and 9. In addition to this provision, parents may also use provision which is not considered 'childcare', for example sports or arts clubs after school or in the holidays. Many schools offer a programme of after school clubs and whilst these are not registered with Ofsted, parents use a combination of these clubs to meet their childcare needs.

Figure 7: Breakfast club provision

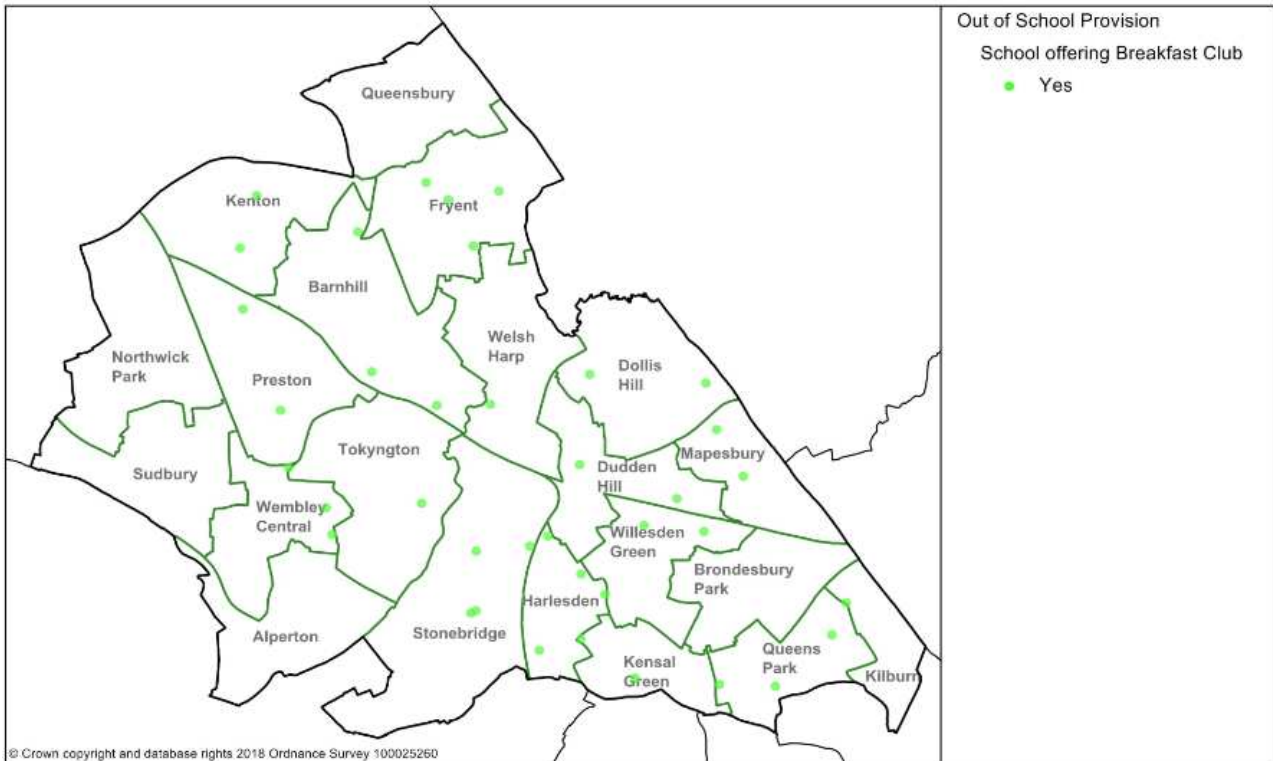


Figure 8: After school provision

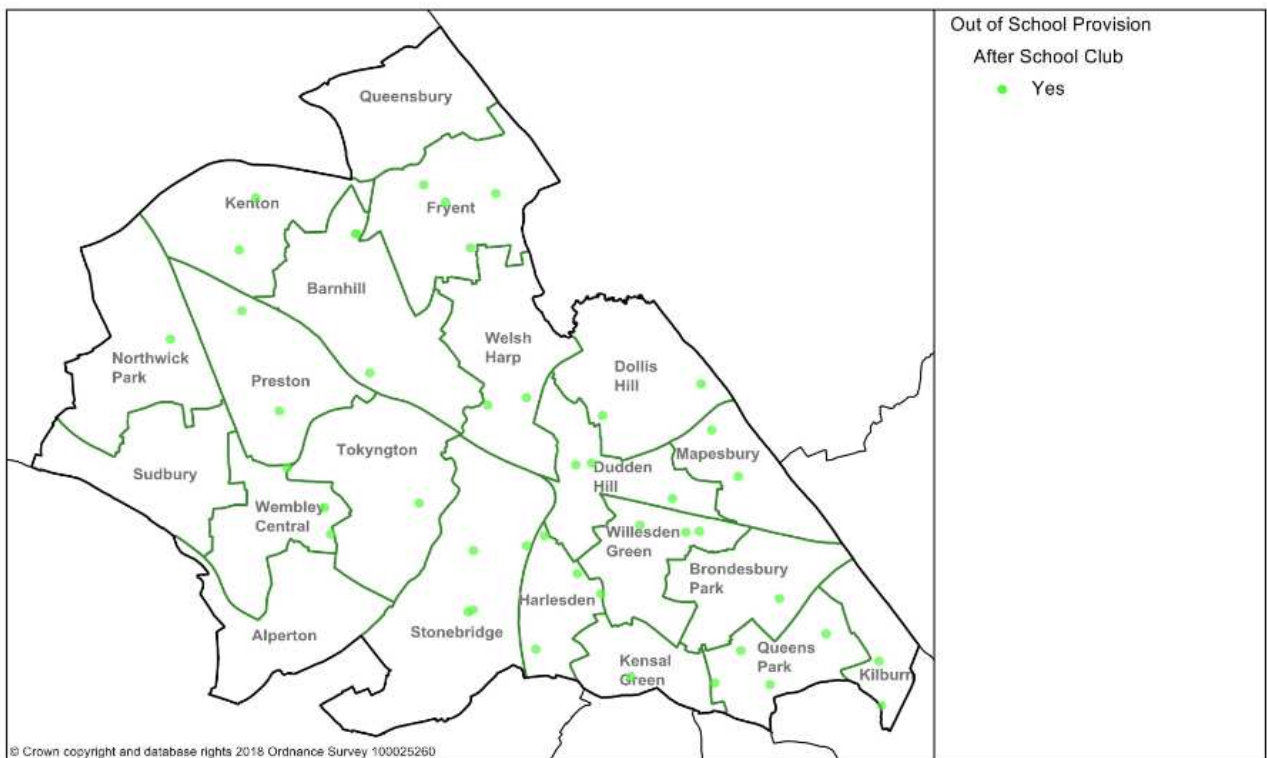
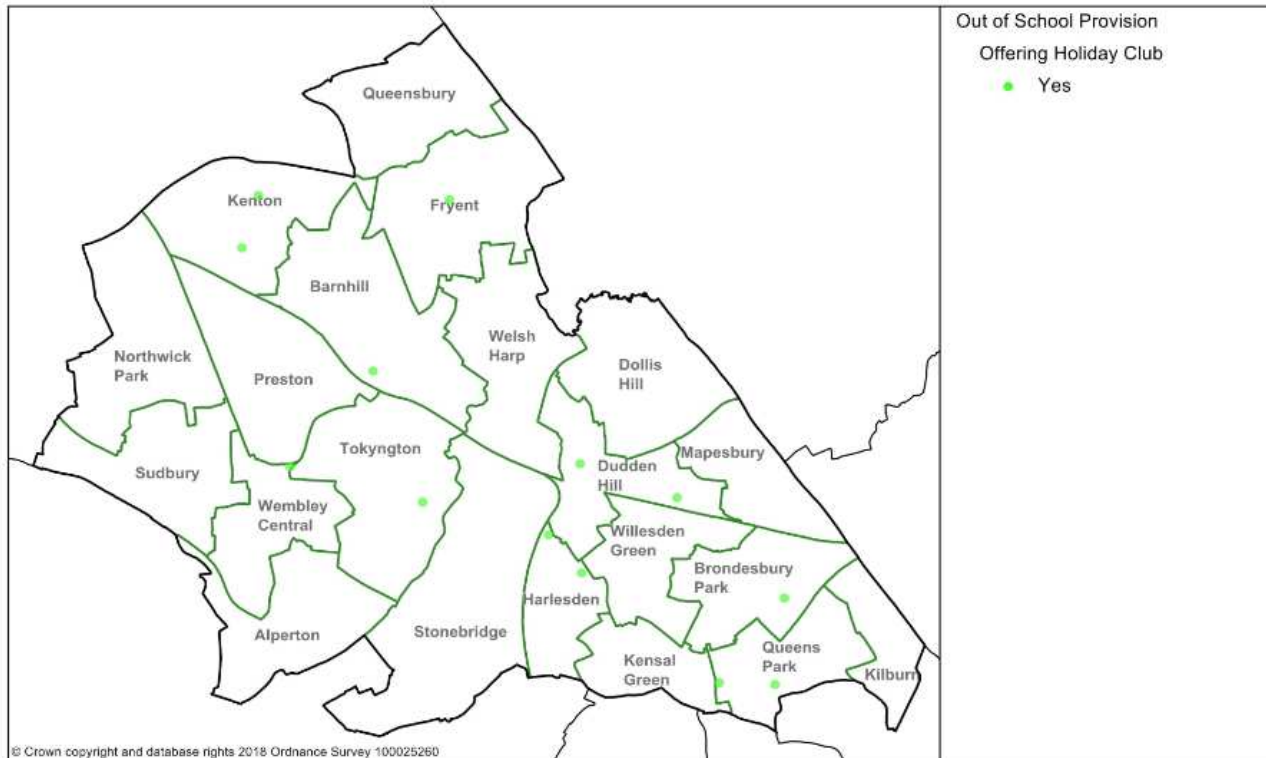


Figure 9: Holiday provision

In the previous childcare sufficiency assessment there were 781 places in out of school providers and 475 places in holiday schemes. This was based on private providers registered with Ofsted. Figures included in the assessment above are reflective both of out of school provision run by school governing bodies and those that run privately. For provision delivered by and in schools, there is not always a registered number of places offered and this is determined by demand at a local level. Anecdotally, schools report that they can increase numbers based on demand and do not have a set maximum number of places. The average number of places of 30 has been used as a proxy for these. Whilst numbers of places for out of hours provision look healthy, this is a largely a result of using the average place figure. In practice this means that depending on the school a child attends the family will or will not have access to provision.

Of the 19 secondary schools (including maintained, independent and academy), 3 report having some form of breakfast club. In addition two schools reported that they offer access to the school canteen from 7:30am for students who wish to purchase breakfast or study. No secondary schools reported having a formal after school provision although many had clubs or revision sessions at the end of the day. The only secondary school to report having holiday provision was an independent all

through school which offers provision for children up to age 11 for the first three weeks of the summer holiday.

Out of hours provision for children with SEND is limited. Of the four special schools in the borough, one (primary) offers an after school club two afternoons per week. Two schools (one secondary and one all through provision) offer holiday schemes on site.

The Brent Childcare Survey 2018 indicates that almost a quarter of parents experience difficulty in finding suitable childcare for young people aged 7-14. This rises to nearly two in five parents/carers of young people aged 15 or over. For families with children aged 11 or more years with SEND, there were no parents/carers who experienced finding childcare as easy and 71% who found it difficult. There is no longer a specific funding stream to support schools with delivery of wrap around care. Legislation introduced in 2016 gives parents the right to request wraparound and holiday childcare for children from year 1 to the end of key stage 3 (although schools may also consider including early years and key stage 4 children in the offer). Brent Childcare Survey 2018 did not ask respondents whether they had formally requested childcare from their child's school. Anecdotally some schools have reported that parents have indicated a preference for out of school provision but that the threshold for demand has not been reached and/or parents do not have the capacity to pay for this provision. This potential demand is something that will be explored further as part of the childcare sufficiency action plan.

School age atypical hours

Childcare is most commonly delivered during the typical working day – between 8am and 6pm on weekdays. Some parents require childcare outside these times in order to fit with their work or other responsibilities. The number of providers offering childcare for atypical hours in our local authority is:

School aged provision atypical hours

| <i>Type of provision</i> | <i>Number of providers</i> | <i>Available before 8am weekdays</i> | <i>Available after 6pm weekdays</i> | <i>Available weekends³</i> |
|------------------------------------|----------------------------|--------------------------------------|-------------------------------------|---------------------------------------|
| Breakfast club – primary school* | 42 | 24 | 0 | N/A |
| After-school club – primary school | 35 | 0 | 3 | N/A |
| Breakfast club – secondary school | 0 | 0 | 0 | N/A |

³ This includes availability at any time during the weekend, not necessarily for the whole weekend

| | | | | |
|--------------------------------------|-----|----|----|-----|
| After-school club – secondary school | 0 | 0 | 0 | N/A |
| Childminders | 172 | 61 | 47 | 23 |
| Holiday club | 15 | 0 | 0 | 0 |

* Distribution of these providers is provided in Appendix D Figure 4

The Brent Childcare Survey 2018 indicates that for 9 in every 10 parents, flexibility and opening times were a factor in their decision to use a childcare provider with 91% of parents/carers reporting that they can find childcare at suitable times, although this reduces to 86% for Harlesden parents/carers (and more positively is 95% for Willesden parents/carers). In Harlesden (88%) and Kingsbury (82%) of parents/carers were most likely to report accommodating work patterns as important compared with 70% of Kilburn parents/carers (the least likely). 84% of parents who participated in the survey are satisfied with the opening times of their childcare provider compared to 68% in 2016. The survey indicates that 18% of parents/carers who responded will have a need for out of hours childcare in the coming 12 months. Generally, one in three of these parents/carers will require childcare before 8am and after 6pm; with one in five, Saturday childcare; and one in ten, Sunday childcare. This indicates there may be an undersupply of atypical hours provision. Families with a lower annual income are more likely to require out of hours childcare at the weekend whereas higher income families are more likely to require childcare outside 8am-6pm during the week. Families with children with disabilities/additional needs also report requiring more out of hours childcare, at all times.

Childcare and employment

There is a close relationship between access to childcare and parents' capacity to gain and retain employment. The Brent Childcare Survey 2018 indicates that 84% of two-parent households with both parents/carers in employment report using childcare to enable them to work compared to 23% of all other two-parent household. 87% of lone parents who are in work report using childcare to enable them to work. Approximately 78% of parents/carers do not report adverse impacts from a lack of suitable, affordable childcare. However, of the 22% that do, 351 parents/carers shared a perspective about the impacts of this. Of these parents/carers:

- The most frequently reported impact for all localities was not being able to take up a job, with half of all parents/carers reporting that this had been the case for them (increasing to 60% for Kingsbury parents/carers).

- One quarter of these parents/carers reported they have found it hard to stay employed. Parents/carers in Kilburn (35%) and Harlesden (35%) were even more likely to report this impact.
- One fifth of parents/carers reported that they were not able to take up studying/training, with Wembley parents/carers most likely to report this (26%). 20 parents/carers provided an 'other' impact and overwhelmingly this was with respect to not being able to work as many hours as they wanted (75%).

In 2017 Brent Early Years circulated a childcare survey to 3139 Brent employers. Of the 152 respondents, 108 responded to questions regarding their knowledge about whether families had children. 42 respondents did not know whether their employees had children. This indicates that generally employers may have little awareness of the potential impact of childcare (or lack thereof) on employees' availability for work. Alongside this only 21% of employers shared information with their employees regarding childcare entitlements. Further highlight information from this report is provided in Appendix B.

4. Funded early education

Introduction to funded early education

Some children are entitled to free childcare, funded by the government and administered by the local authority. These entitlements are for the equivalent of 38 weeks per year.

- All children aged 3 and 4 are entitled to 15 hours per week until they start reception class in school
- Children aged 3 and 4 where both parents are working, or from lone parent families where that parent is working, are entitled to 30 hours per week until they start reception class in school⁴. Families are eligible where each parent is earning the equivalent of 16 hours per week at minimum or living wage and earns under £100,000 per year. Families also qualify where one parent is on maternity leave, Incapacity Benefit, Severe Disablement Allowance, Carer's Allowance or Employment and Support Allowance and the other parent is working.
- Children aged 2 whose families receive certain benefits (including in-work benefits with an income of less than £16,190), or who have a disability, or who are looked after by the local authority, are entitled to 15 hours per week. From April 2018, families who are in receipt of Universal Credit and a combined/sole income of less than £15,400 a year after tax will also be entitled to the 15 hours per week. Universal Credit is expected to roll out in Brent from November 2018. Nationally, about 40% of 2 year olds are entitled to this offer, but the proportion varies by area

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

Proportion of 2-year-old children entitled to funded early education

- In Brent local authority, as at March 2018 38% of 2 year olds are entitled to funded early education. This equates to around 4715 children per year in 2017-2018

⁴ Available to families where both parents (or a lone parent) are earning the equivalent of sixteen hours per week on the minimum wage

Take up of funded early education

The proportion of eligible children taking up their funded place (for at least some of the available hours) in Brent is:

| Age | % of eligible children |
|-------------|------------------------|
| Age 2 | 59% |
| Age 3 and 4 | 80% |
| 3 year olds | 77% |
| 4 year olds | 83% |

The data in this table is based on Department for Education data release June 2017 based on January 2017 Census.

3 and 4-year-old funded entitlement applications

Parents who think they are entitled to a 30 hour extended hours place apply for this online through the Government's Childcare Support website. The same website is used to apply for tax free childcare and parents can apply for either or both. If a parent is eligible, the system creates a code which they can use with their chosen childcare provider. If they are ineligible, they will still be entitled to the universal 15 hours of childcare.

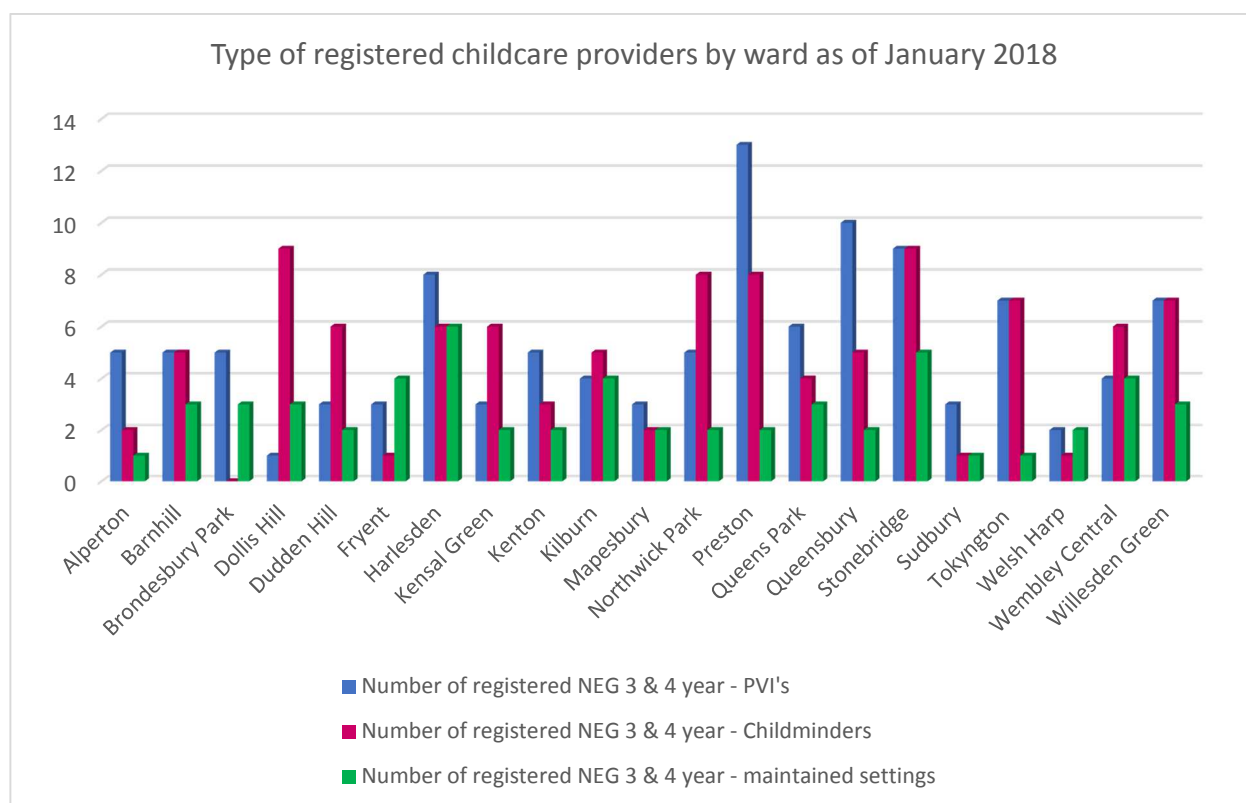
| | <i>Eligibility codes issued</i> | <i>Eligibility codes validated</i> | <i>Take up of place</i> | <i>% take up</i> |
|---------------------|---------------------------------|------------------------------------|-------------------------|------------------|
| <i>January 2018</i> | <i>1360</i> | <i>1196</i> | <i>1086</i> | <i>80%</i> |
| <i>May 2018</i> | <i>1483</i> | <i>1349</i> | <i>1392</i> | <i>94%</i> |

The data in this table is based on Brent headcount figures for March 2018 and May 2018

Take up has increased from September 2017 to January 2018 suggesting that parents are becoming more aware of this entitlement.

Providers offering funded early education places

Providers are paid directly by government for delivering funded early education. They are not required to offer them to parents, but of course parents may choose to use a different provider if they do not. Some providers offer a restricted number of funded places.

Figure 10: Distribution of free entitlement providers in Brent as at January 2018

As of January 2018, a total of 269 providers were registered to offer the free entitlement for 3 and 4 year olds. Of these, 111 are PVI's, 101 childminders and 54 maintained settings.

A significantly lower proportion of providers are currently offering the 30 hour entitlement. The Family and Childcare Trust⁵ reports that nationally 82% of nurseries are offering places and in Brent numbers are slightly lower with 79% of Brent PVI's offering places. 39% (68) of Brent childminders have registered to deliver the extended entitlement - well below the national average of 53%. By contrast 65% (35) of school providers are delivering 30 hours places. This is higher than the national average of 57%.

⁵ Family and Childcare Trust Childcare Survey 2018 based on survey from local authorities submitted between November 2017 and January 2018.

The 3 wards with the *highest* number of free entitlement providers are;

- Preston - 23
- Stonebridge - 23
- Harlesden - 20

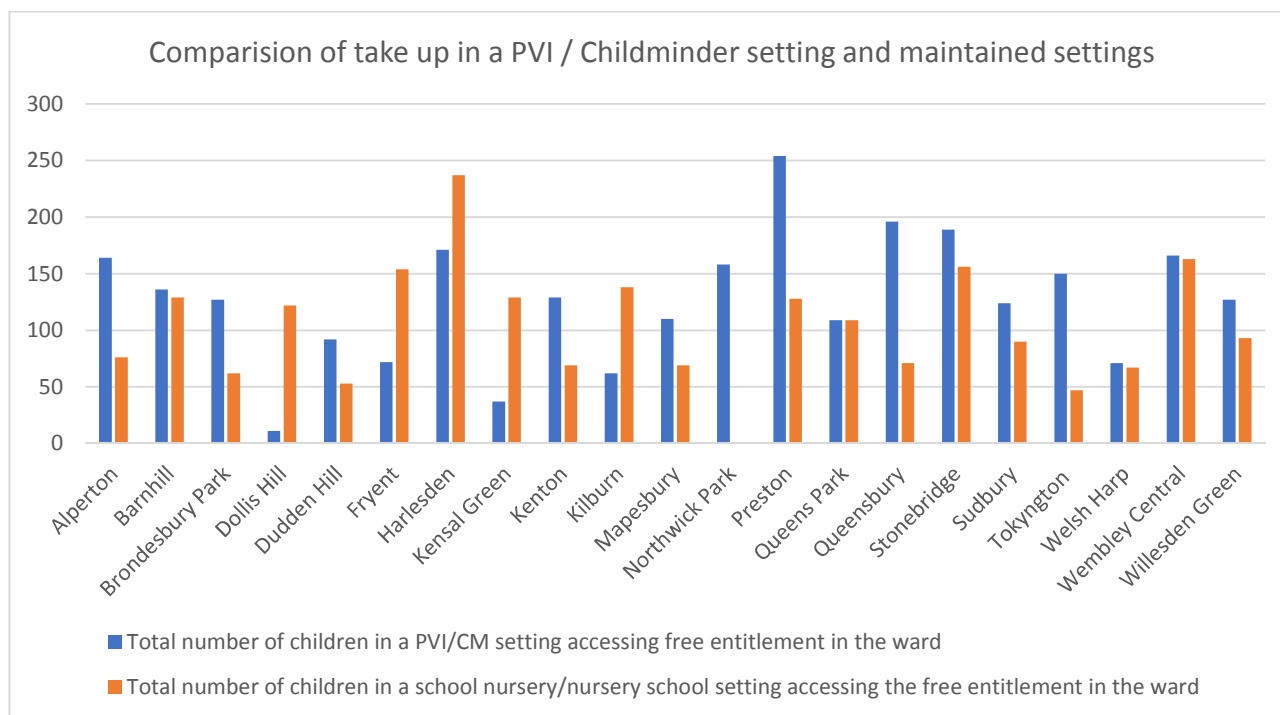
The 3 wards with the *lowest* number of free entitlement providers are;

- Sudbury – 5
- Welsh Harp - 5
- Mapesbury – 7

Comparing take up of funded early education over time

| Age | 2017 | Year-1 (2016) | Year -2 (2015_) |
|------------------|------|---------------|-----------------|
| Age 2 – targeted | 59% | 55% | 45% |
| Age 3 and 4 | 80% | 81% | 83% |

Figure 11: Comparative take up across provision type



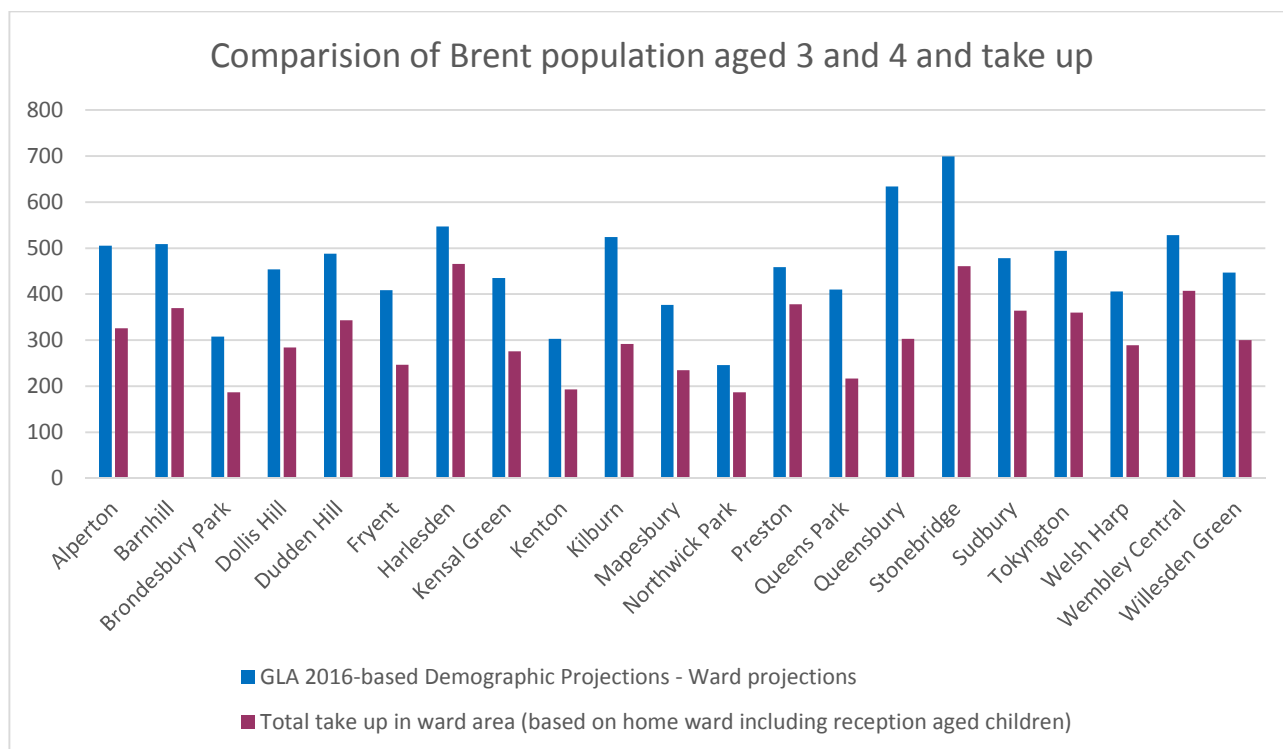
Data based on January 2018 census

Following January 2018 census, 2,655 children are taking up a free funded place with a PVI/childminder and 2,162 children with a maintained setting indicating a balance of delivery across different providers within the sector. Figure 12 identifies the patterns of take up within each ward area and numbers of children taking up a provision in reception class, out of borough or not at all.

Figure 12: Take-up by ward based on January 2018 census

| Ward | GLA 2016-based Demographic Projections - Ward projections | Total 3 and 4 year old free entitlement take up (based on home ward) | Percentage take-up in ward area | Children aged 4 in reception class | Percentage of children in reception class | Children in provision outside of Brent or not taking up a place | Percentage of children in provision outside of Brent or not taking up a place |
|-------------------------|---|--|---------------------------------|------------------------------------|---|---|---|
| Alperton | 505 | 225 | 45 | 101 | 20 | 179 | 35 |
| Barnhill | 509 | 246 | 48 | 124 | 24 | 139 | 27 |
| Brondesbury Park | 308 | 136 | 44 | 51 | 17 | 121 | 39 |
| Dollis Hill | 454 | 183 | 40 | 101 | 22 | 170 | 37 |
| Dudden Hill | 488 | 228 | 47 | 115 | 24 | 145 | 30 |
| Fryent | 409 | 158 | 39 | 89 | 22 | 162 | 40 |
| Harlesden | 547 | 309 | 56 | 157 | 29 | 81 | 15 |
| Kensal Green | 435 | 177 | 41 | 99 | 23 | 159 | 37 |
| Kenton | 303 | 135 | 45 | 58 | 19 | 110 | 36 |
| Kilburn | 524 | 171 | 33 | 121 | 23 | 232 | 44 |
| Mapesbury | 377 | 144 | 41 | 91 | 24 | 142 | 35 |
| Northwick Park | 246 | 127 | 52 | 60 | 24 | 59 | 24 |
| Preston | 459 | 267 | 58 | 111 | 24 | 81 | 18 |
| Queens Park | 410 | 141 | 34 | 76 | 19 | 193 | 47 |
| Queensbury | 634 | 192 | 30 | 111 | 18 | 331 | 52 |
| Stonebridge | 699 | 278 | 40 | 183 | 26 | 238 | 34 |
| Sudbury | 478 | 229 | 48 | 135 | 28 | 114 | 24 |
| Tokyngton | 494 | 231 | 47 | 129 | 26 | 134 | 27 |
| Welsh Harp | 406 | 180 | 44 | 109 | 27 | 117 | 29 |
| Wembley Central | 528 | 252 | 48 | 155 | 29 | 121 | 23 |
| Willesden Green | 447 | 198 | 44 | 102 | 23 | 147 | 33 |
| Out of borough children | | 610 | | 153 | | | |
| TOTAL | 9660 | 4817 | | 2431 | | 2412 | |

Figure 13: Take up by ward

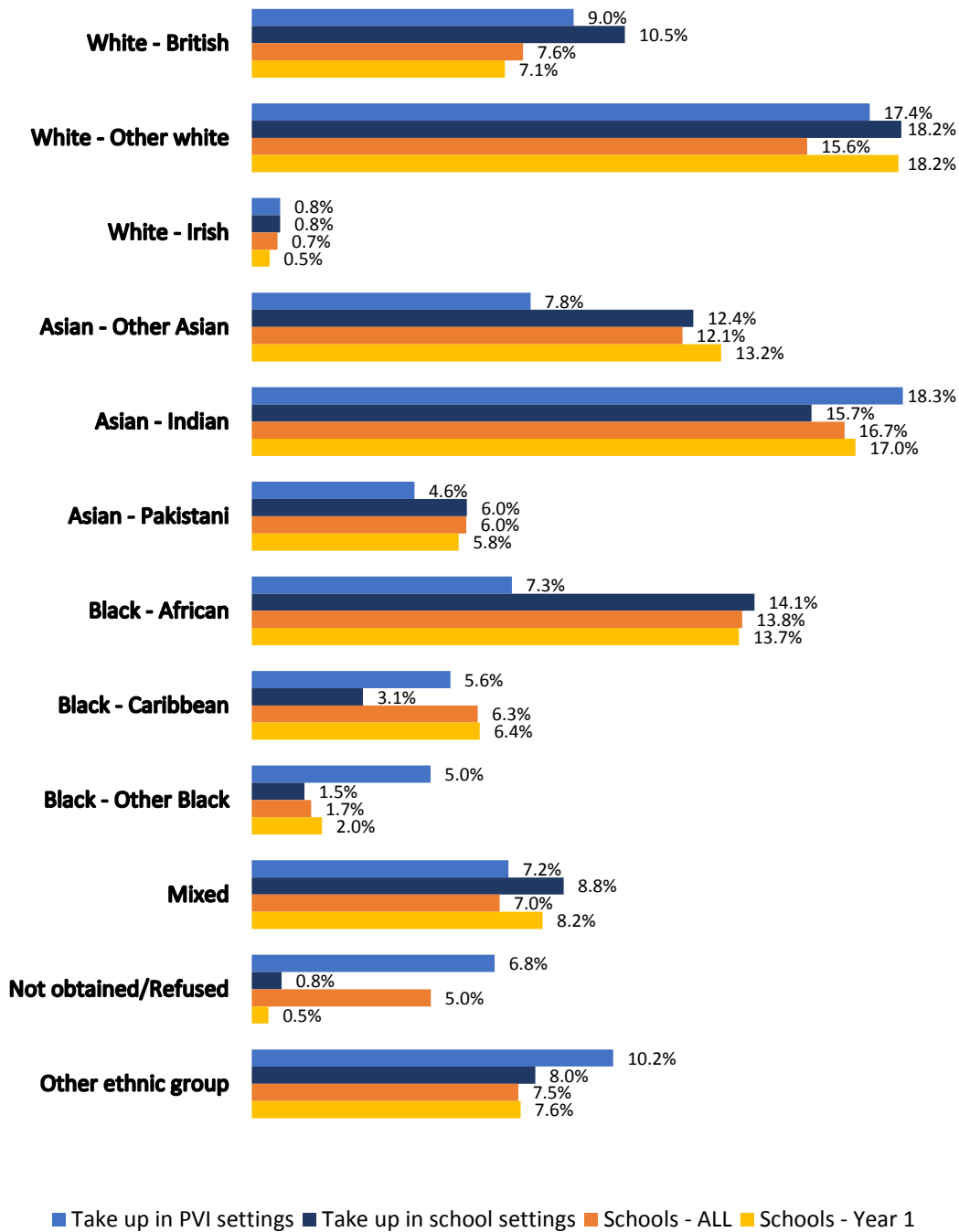


Population data source GLA projections for the year 2018 (based on GLA 2016-based Demographic Projections, 2017)

The above figure indicates that Harlesden has the highest number of children taking up their free entitlement and in a reception class, with 85% of the 3 and 4 years olds from the ward accessing a place. This reflects the number of childcare providers within this ward, with Harlesden being in the top three across Brent. In comparison to the population of the ward, Queensbury has the lowest number of children taking up their free entitlement with 48% of 3 and 4 years olds from the ward taking up a place. The low take-up within this ward area does not correlate with the number of registered childcare places.

Comparative analysis shows that take up by ethnicity of free entitlement for 3 and 4 year olds is broadly in line with the ethnicity make up in Year 1 in Brent schools. Unfortunately there are 6.8% of children whose ethnicity has not been provided as part of headcount information in PVI's so this may mask some patterns around take up. As illustrated in Figure 14 on the following page, the January 2018 School Census indicates 7% more Black African children are taking up a free entitlement place in school setting rather than a PVI. There are 2.5% more Black Caribbean children and 3.5% more children identified as Black –Other black taking up a place in a PVI setting rather than a school.

Figure 14: Take up by ethnicity



5. Prices

For early years childcare outside the funded entitlements, the analysis below identifies average prices per hour, reported to the local authority by settings.⁶ There may be variations to prices based on the number of hours a family uses, with reductions for longer hours, or discounts for sibling groups. There may be additional payments for lunch and other meals which are not included in these prices.

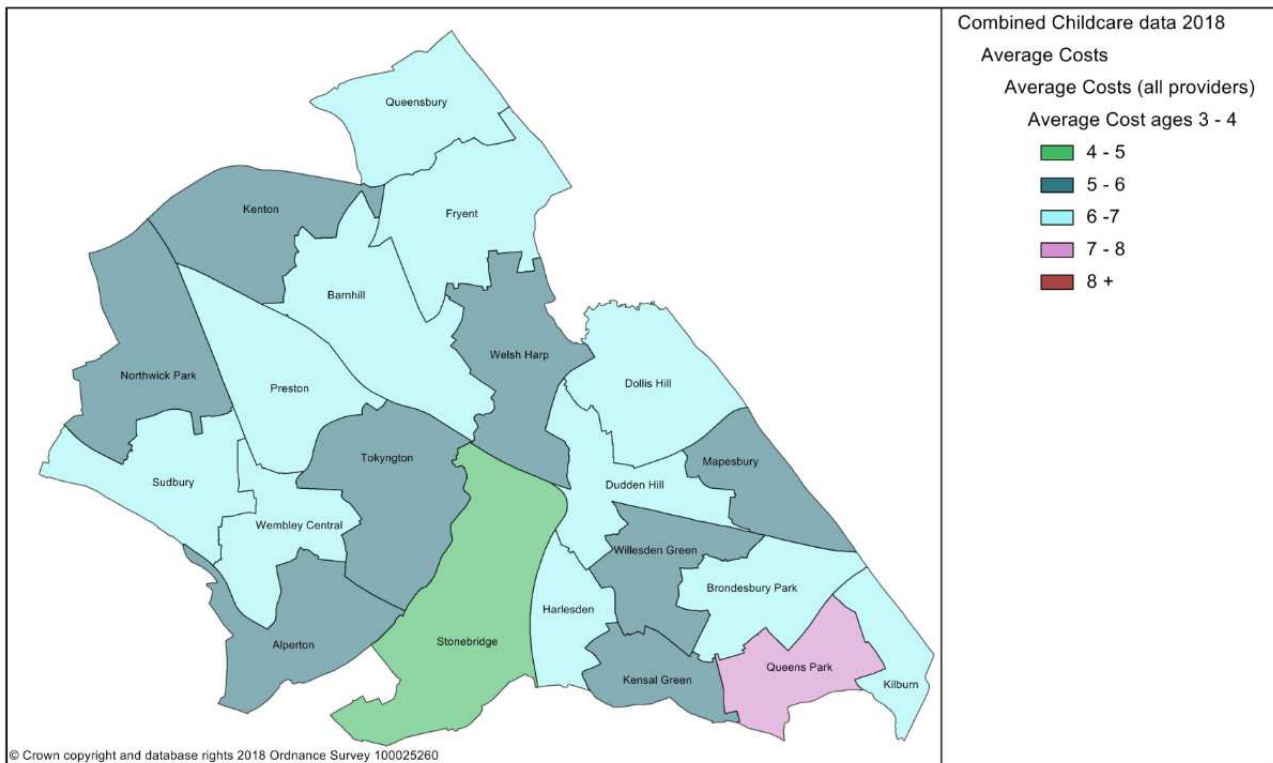
| Average price per hour | Private, voluntary and independent nurseries | School and maintained nursery schools which make charges to parents | Childminders |
|------------------------|--|---|--------------|
| 0 and 1 year olds | £6.18 | N/A | £6.52 |
| 2 year olds | £6.08 | N/A | £6.35 |
| 3 and 4 year olds | £5.85 | £6.00 | £6.94 |

This means that the weekly cost for a part time (25 hour) place for an under two year old in Brent is £158.75 in a PVI setting and £163 in a childminding setting. This is considerably higher than outer London averages provided by the Family and Childcare Trust⁷ being £145.44 and £135.71 respectively. Likewise the average price for a two year old to attend a setting for 25 hours is £152 in a PVI setting and £158.75 in childminding setting, considerably higher than the reported outer London average of £134.03 and £135.36 respectively. Average costs provided by childminders for over-twos was higher again with the average cost being £6.94, significantly higher than the reported average of £6.15 per hour in the 2016 CSA. The costs of childcare for 3 and 4 year olds are reflected in Figure 15 on the following page illustrating the variance in fees across the borough. These costs do not include free entitlements or support that parents may be receiving with the costs of childcare (eg Tax-free childcare).

⁶ Details of how we collect this data are in the methodology section below

⁷ Family and Childcare Trust Childcare Survey 2018

Figure 15: Costs of childcare for 3 and 4 year olds



Brent Childcare Survey indicates fewer than nine in 20 parents/carers (44%) agree that childcare in Brent is affordable. This is 6% less than findings regarding affordability in the 2016 CSA. This view is supported by approximately 50% of the responders in the Employer Survey stating that childcare should be made more affordable. The lack of affordable childcare has resulted in adverse impacts for at least one in five (22%) parents/carers. This includes half of these parents reporting not being able to take up a job (60% in Kingsbury and close to three in four parents/carers aged 22-29 years) and a quarter finding it hard to stay in a job (35% in Kilburn and Harlesden). Half of parents/carers only use free childcare, while half pay on average £130/week per child (as well as using free childcare). Higher income households pay more, with 82% of those, for example, with annual incomes of £60-£100,000 paying £167/week per child and 87% of households with annual incomes of £100-£200,000 paying £196/week per child. This is also reflective of the hours of childcare used. Families with annual household incomes greater than £60,000 use 3.2 or more days per week of childcare, with those earning above £200k using most at 3.6 days. By contrast, families with an annual household income less than £10,000 use least, at 2.35 days. The relationship between costs of childcare and household income is illustrated in Figure 16.

Figure 16: Childcare costs and household income*

| Household income | Fully funded childcare % | Average cost/ week/ child |
|----------------------------|--------------------------|---------------------------|
| Less than £10,000 per year | 68% | £93 |
| £10,001- £20,000 per year | 72% | £81 |
| £20,001- £30,000 per year | 45% | £118 |
| £30,001- £40,000 per year | 53% | £119 |
| £40,001- £50,000 per year | 38% | £123 |
| £50,001- £60,000 per year | 27% | £123 |
| £60,001- £99,999 per year | 18% | £167 |
| £100K- £199,999 per year | 13% | £196 |
| OVER £200K | 5% | £248 |

*As reported in the Brent Childcare Survey 2018

In the Brent Childcare Survey 2018 51% of respondents used only the free entitlements to pay for their childcare. Of the 49% of parents who pay for the cost of childcare the average cost is £130 per week per child.

Prices of school age childcare

For school age children during term time, average prices before school per day, after school per day, and for childminding per hour are provided. For holiday childcare, holiday club prices per week are included.

| Setting and price unit | Price |
|---------------------------------|--------|
| Breakfast club per day | £1.60 |
| After-school club per day | £6.00 |
| School age childminder per hour | £7.25 |
| Holiday club per week | £97.08 |

The Family and Childcare Trust Holiday Childcare Survey 2017⁸ indicates that the national average of cost for holiday provision is £124, significantly higher than the Brent average. There are currently no national datasets with which to compare the cost of out of school provision.

⁸ Family and Childcare Trust Holiday Childcare Survey 2017 <https://www.familyandchildcaretrust.org/holiday-childcare-survey-2017>

6. Quality of childcare in our area

Ofsted inspection grades

All childcare providers must register with and be inspected by Ofsted, who give them an overall grade for the quality of their provision. Childminders and private and voluntary providers are on the Early Years Register, and schools and stand-alone maintained nursery schools are on the Schools register. The grades for both registers are equivalent. Schools with nurseries have an overall inspection grade for the whole school and most also have a separate early years grade.

Both schools and early years providers have four possible Ofsted grades: 'outstanding', 'good', 'requires improvement', and 'inadequate'.⁹ Some providers are still awaiting their first full inspection. These providers are excluded from our calculation.

Nursery classes in independent schools do not generally have an Ofsted grade.

Ofsted Inspection results for early years provision in Brent as at March 2018

| <i>Type of provision</i> | <i>Total number of providers</i> | <i>Providers who have a current Ofsted judgement**</i> | <i>% achieving good or outstanding</i> |
|---------------------------------|----------------------------------|--|--|
| Childminders | 172 | 111 | 96% |
| Nursery classes in schools * | 51 | 50 | 98% |
| Maintained nursery schools | 4 | 4 | 100% |
| Private and voluntary nurseries | 117 | 88 | 89% |
| <i>Total</i> | 343 | 253 | 96% average across all providers |

* early years grade if available, otherwise overall school grade

** providers who are newly registered, inspected by ISI or who have received met/not met are not included in this figure

Providers with met/not met grade

When providers do not have any children on site at the time of their inspection, they are given an Ofsted grade of 'met' or 'not met'. This shows whether they are meeting the requirements for Ofsted

⁹ For more information see <https://reports.ofsted.gov.uk/about-our-inspection-reports>

registration, and usually happens when new providers are being set up. At present, we have 33 providers with a 'met' grade and 14 providers with a 'not met' grade. These providers have not been included in the percentages above and below.

Comparing inspection grades over time

| <i>% of providers 'good' or 'outstanding'</i> | <i>Year 2018</i> | <i>Year 2017</i> | <i>Year 2016</i> |
|---|------------------|------------------|------------------|
| Childminders | 96% | 95.61% | 86.32% |
| State school nurseries | 98% | 96% | 93.88% |
| Maintained nursery schools | 100% | 100% | 100% |
| Private and voluntary nurseries | 88.63% | 91.57% | 92.47% |
| Total | 96% | 96% | 93% |

The 2016 Childcare Sufficiency Assessment reported that the number of nurseries rated "inadequate" or "requires improvement" fell from 33 in 2013 to 5 in 2015. This figure decreased to 3 in 2018 with 7 settings requiring improvement. The number of childminders rated "inadequate" or "requires improvement" fell from 62 in 2013 to 29 in 2015. In 2018, only 3 childminders are rated as inadequate and only 1 requires improvement.

This is mirrored by parental views on quality with the Brent Childcare Survey 2018 indicating that parents' assessment of the quality of early years settings has improved. 92% (compared to 79%) of parents agree or strongly agree that they are happy with the quality of their child's setting. The figures below illustrate the spread of provision both good and outstanding and requiring improvement or inadequate. This illustrates the sufficiency of good and outstanding provision across the borough. It is the aspiration of the borough that all Brent children will have access to good and outstanding provision.

Figure 17: Under-5s Provision requiring improvement or inadequate

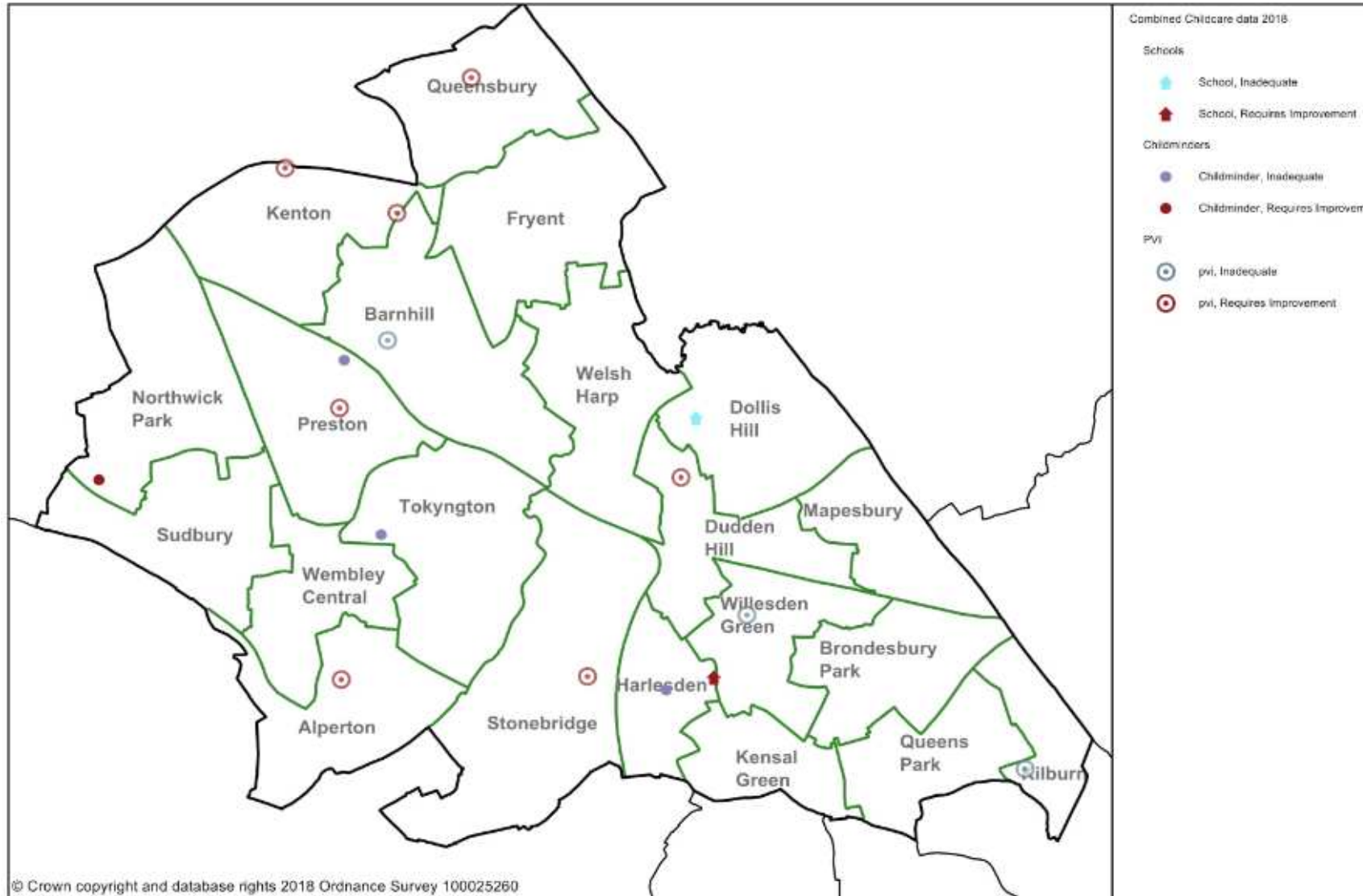
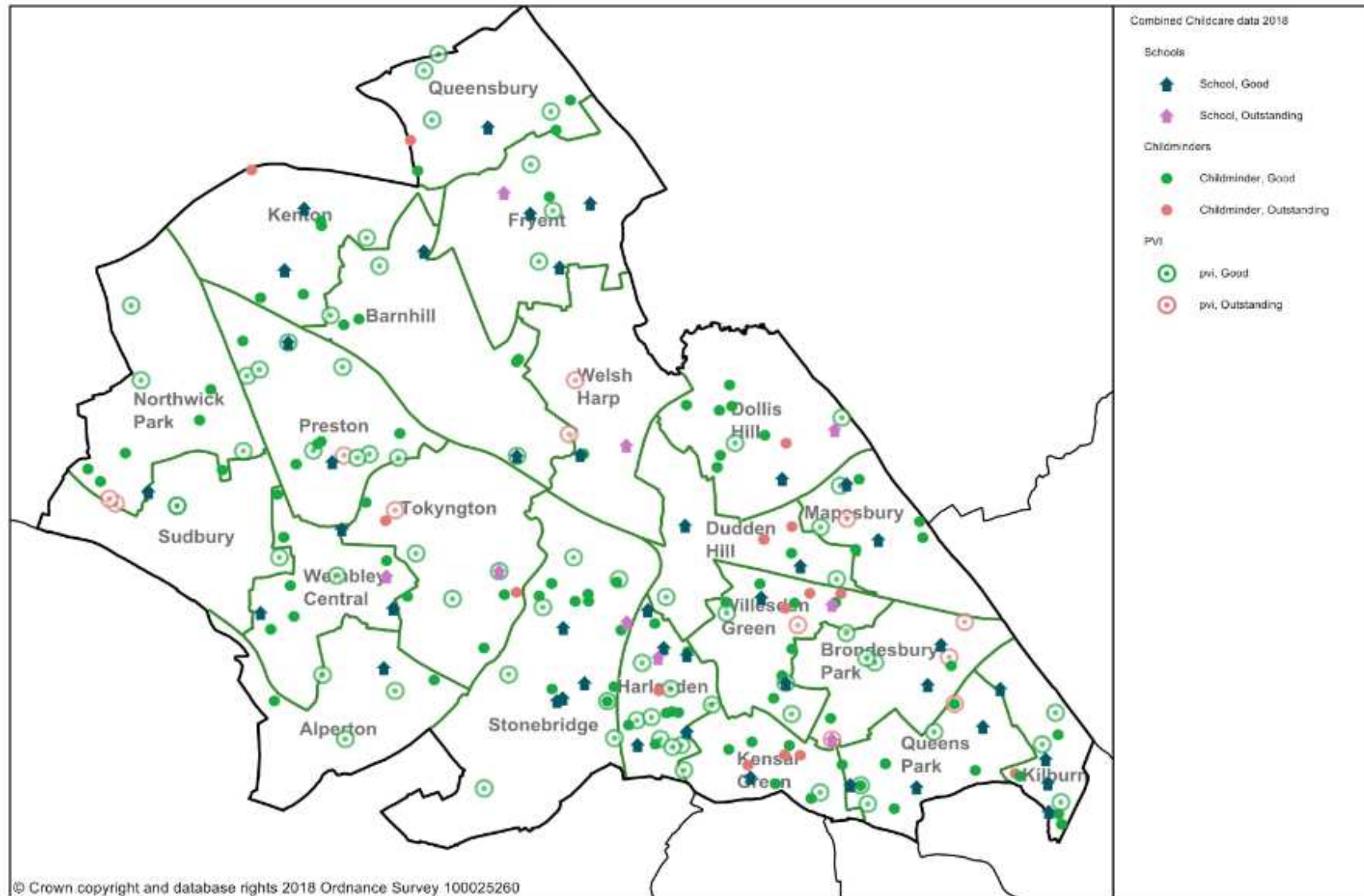


Figure 18: Under-5s provision good or outstanding



6. Parents and providers views of sufficiency of childcare in our local area

Parent survey

Brent Early Help Service developed and distributed a survey for parents/carers to collect feedback regarding childcare use. An external consultant was commissioned to input, analyse and report on the survey data and to undertake some qualitative research exploring the individual experience and motivations of Brent parents/carers in using childcare. 1,932 surveys were returned by parents/carers and have been analysed in relation to a range of characteristics; and 49 parents/carers were met with through focus groups, interviews and conversations as families attended activities at Brent Children's Centres and early years provision. The executive summary of this report is included as Appendix A and the full report can be accessed by contacting cfis@brent.gov.uk. Key findings of this report have been included in the relevant sections of the assessment.

Provider survey

Brent Council seeks providers' views on the quality of service provided by the Early Years team. In the 2018 exercise there were 40 respondents across school, PVI and childminder settings. While asked to comment on the quality of service provided almost a quarter of respondents made comments about the need for increased funding for free entitlement funded spaces and/or for the time from headcount to payment to be reduced. This has been addressed through the introduction of an estimates and actuals payments process enabling free entitlement providers to have access to up front funding for delivery of places.

7. Methodology

- Number of children: based on GLA population projections from the London Data Store
- Children with EHC plans: based on data held by our local authority
- Supply of childcare: based on data provided to us by Ofsted, who regulate early years provision in schools and childcare provision.
- Vacancy rates: obtained through online submissions from providers and in some cases officer ring rounds to providers to confirm figures
- Childcare for parents working atypical hours: obtained through phone confirmation with providers around opening hours and cross matching to Ofsted registration information
- Funded early education: data on take up of funded early education entitlements is based on the Early Years and Schools Censuses, which are taken every January and published by the Department for Education in the statistical collection *Education provision: children under five years of age*. Data on entitlement to a funded early education place for 2 year olds is provided by the Department for Work and Pensions.
- Price of childcare: obtained through ring around exercises to providers where providers were asked to confirm both hourly rates and daily rates. Where hourly rates were not provided averages were used.
- Quality of childcare: data on childcare quality is provided by Ofsted.
- Data from providers and parents: the methodology for collection of parent data is provided in Appendix A.
- The format of this assessment is based on template provided by the Greater London Authority (GLA) in October 2017

Appendix A – Brent Childcare Survey 2018 (Executive Summary)

Executive Summary

Brent Early Help Service has the responsibility for delivery of Brent Council's statutory obligations in respect of childcare sufficiency. Each year, local authorities are expected to report annually to Council Members on how they are meeting their duty to secure sufficient childcare and make this report available and accessible to parents. This report contributes to fulfilling that statutory duty.

Brent Early Help Service developed and distributed a survey for Brent parents/carers to gather feedback about patterns of childcare use, sources of information for motivations and experiences of using childcare. The Brent Early Help Service commissioned George Partnership Ltd to input, analyse and report on the survey data and to undertake some qualitative research that illuminates the individual experience of, and motivations of Brent parents/carers in using childcare.

1,932 surveys were completed¹⁰ by parents/carers and have been analysed in relation to a range of characteristics; and 49 parents/carers were met with through focus groups, interviews and conversations as families attended activities at Brent Children's Centres and early years provision. The methodology is set out at Appendix One and the findings from the qualitative research is set out at Appendix Four

Section 1.01 *Key findings*

(a) Motivations and decision factors

The main reasons that parents/carers report for using childcare are:

- *For my child to learn and play with other children (57%)*
- *I go to work (52%)*
- *It's good for my child (49%)*

In making decisions about which childcare setting to choose, more than 19 in every 20 parents/carers take account of the safety and security, quality of care, qualified staff, the atmosphere, the range of activities and closeness to home, while for at least nine in every 10 parents/carers, flexibility, opening times and Ofsted reports are important. Least important is whether childcare is close to work. See 2.2.

There are variances between parents/carers e.g. while six in 10 parents/carers consider how effective a setting is in meeting their child's additional needs, for nine in 10 parents/carers of children with disabilities/additional needs this is important.

¹⁰ At least partly

(b) Types and frequency of use of childcare

The most popular types of childcare are:

- *Day nurseries* accounting for 25% of all childcare used in Brent (with close to two in five children aged 3-4 years using a day nursery);
- *Grandparents* accounting for 17% of total selections, with grandparents the most likely form of childcare for children aged 0-1 year (30%) and for young people aged 11-14 years (24%); and
- *Nursery attached to schools* accounting for 13% of total selections.

After school clubs are the most popular choice for children aged 7-10 years (30% use) and for young people aged 15 or more (19% use) and second most popular for young people aged 11-14 years (23%).

In the survey, 7% of parents/carers report using no childcare, with families from south Asia less likely to use childcare. No childcare is reported for 46% of young people aged 15 or more years and 30% of young people aged 11-14 years.

The average number of days of childcare used by parents/carers was 2.69 days¹¹. This corresponds with findings in the 2016 CSA report. There are variances between families (see 2.4) with households where both parents/carers are in work or a lone parent either works or is in study/training using more childcare; and families with an annual household income greater than £60,000 use 3.2 or more days per week of childcare (while families with an annual household income less than £10,000 use at least 2.35 days).

(c) Ease of finding suitable childcare

Overall, 65% of Brent parents/carers report that finding suitable childcare was either (very) easy, while 13% parents/carers report finding suitable childcare as (very) difficult. This difficulty increases to nearly one in four parents/carers of young people aged 7-14 and to nearly two in five parents/carers of young people aged 15 or over.

Parents/carers with children with disabilities/additional needs, however, find it significantly more challenging than all other families.

- With children aged 0-4 years, 54% found it (very) easy and 18% found it (very) difficult.
- With children aged 4-10 years, 41% found it easy/very easy and 30% found it (very) difficult.
- With children aged 11 or more years, there were no parents/carers that found this (very) easy and 71% found it (very) difficult.

(d) Out of hours childcare needs

18% of parents/carers across Brent report having needs for out of hours childcare in the coming 12 months. Generally, one in three of these parents/carers will require childcare before 8am and after 6pm; with one in five, Saturday childcare; and one in ten, Sunday

¹¹ This is calculated based on an 8 hours day

childcare. Weekend childcare is required more in Wembley, while longer days are required more in Willesden.

Families with a lower annual income are more likely to require out of hours childcare at the weekend whereas higher income families are more likely to require childcare outside 8am-6pm during the week. Families with children with disabilities/additional needs also tend to require more out of hours childcare, at all times.

(e) Affordability of, and costs of childcare

Affordability is a significant concern, with fewer than nine in 20 parents/carers (44%) agreeing that childcare in Brent is affordable. This is 6% less than findings vis-à-vis affordability in the 2016 CSA. In the comments section at Appendices Three and Five and in the one-to-one conversations with parents/carers set out at Appendix Four, worries about childcare affordability are recurrent.

The lack of affordable childcare has resulted in adverse impacts for at least one in five (22%) parents/carers. This includes half reporting not being able to take up a job (60% in Kingsbury and close to three in four parents/carers aged 22-29 years) and a quarter finding it hard to stay in a job (35% in Kilburn and Harlesden).

Half of parents/carers only use free childcare, while half pay on average £130/week per child (as well as using free childcare). Higher income households pay more, with 82% of those, for example, with annual incomes of £60-£100,000 paying £167/week per child and 87% of households with annual incomes of £100-£200,000 paying £196/week per child.

(f) Overall perspectives

While perceptions of affordability have decreased, perspectives on other key criteria have improved. For example:

- Satisfaction is at 97% compared to 95% in 2016.
- Quality is 92% compared to 79% in 2016.
- The ability to meet the additional needs of children is 74% compared to 65% in 2016.
- Childcare being in sought after locations is 85% compared to 72% in 2016.
- Opening times are 84% compared to 68% in 2016.

There are also only slightly more than half of parents/carers that agree that there is sufficient holiday provision for children in full-time education and available out of hours within their area, although the greater the income the less likely that parents/carers agree (e.g. less than two in five households with annual incomes of £50,000 agree less than one in three households with an annual income greater than £100,000 agree).

While 74% of parents/carers overall report that their child's special needs are well met, 86% of parents/carers that report their child has a disability/additional needs agree that these needs are well met. In other areas their experience is much less positive, however, with less than nine in 20 parents/carers agreeing there is sufficient childcare for children in fulltime education in school holiday and before 8am and after 6pm during the week (43% and 46% respectively as compared to 55% on both indicators for other parents/carers).

Like disabled parents/carers, parents/carers of children with a disability/additional needs are also more likely to report not being able to take up training/work due to childcare (34% compared to 28%).

(g) Finding out about childcare

Overall 42% of parents/carers find it (very) easy to find advice and information about childcare in Brent, with 40% rating it neither 'easy or difficult'. Just under one in five parents/carers (18%) found it was (very) difficult. This corresponds to results in 2013 and 2016.

Those localities, where 20% of parents/carers found finding information and advice about childcare in Brent as difficult are in Harlesden, Kingsbury and Wembley. By contrast, fewer parents/carers found it difficult in Kilburn and Willesden (12%).

Parents/carers with lower annual household incomes (i.e. less than £20,000) experienced less difficulty (9%) whereas for parents/carers with higher annual household incomes they experienced most (24% for £100-200,000 and 27% for over £200,000). Parents with children with disabilities/additional needs and families that are from Any Other Ethnic Group (see Appendix Three) also found it more difficult.

In total, 42% of parents/carers reported that they knew about the Children and Families Information Service (CFIS) as a source for information and advice about childcare within Brent; with the lower annual household income and families where one or both parents/carers are not in work, the more likely to know about the CFIS. White British and Irish parents/carers were amongst the least likely to be aware of the CFIS.

Overall 77% of all parents/carers that used the CFIS said they were satisfied, with 20% neither satisfied or dissatisfied and 3% of parents/carers reporting dissatisfaction. See 4.3.

Parents/carers have multiple information sources for learning about childcare (with on average parents/carers choosing 1.4 options each), although just over half of all parents/carers (52%) identify friends and relatives as the primary source of information and advice about their current childcare. In relation to other information, the main sources identified by parents/carers are:

- *The internet (26%)*, which is used proportionately by more parents/carers with higher household incomes
- *The CFIS (19%)* which is used proportionately by more lone parents, parents/carers with lower household incomes and parents/carers with a disability and/or a child with a disability/additional need
- *School (18%)* which is most relevant the older the parent/carer
- *Parent and toddler group (10%)* which is used proportionately by more White British and Irish parents/carers.

The least common sources of information and advice are health visitors/GPs/health clinics (4%, although this is greatest amongst parents with disabilities), the library (4%), live or work close by (3%) and JobCentre Plus (1%).

(h) Other feedback

As well as the qualitative research findings set out at Appendix Four, Appendix Three sets out 127 comments about why parents/carers do not feel their childcare needs are being met (grouped by locality- and where opening times and flexibility, out of hours and school holiday provision and affordability are most significant).

Appendix Five sets out the 329 additional comments provided by parents/carers in the survey, a quarter of which are compliments about how much the family or child benefits from childcare and how needs are met.

Appendix B - Childcare and Employers: Findings of the Employer Survey 2017

In the 3rd quarter of 2017-2018 a survey of employers in Brent was conducted to establish current awareness of the childcare offer and employers' attitudes towards providing information regarding childcare to their employees. The executive summary of this report is included as Appendix B of this assessment and the full report can be accessed by contacting cfis@brent.gov.uk. Key findings of this report have been included in the relevant sections of the assessment.

Childcare and Employers: Findings of the Employer Survey 2017

Executive summary

Happy employees have been shown to be 12% more productive than unhappy colleagues (source: Happiness and productivity: understanding the happy-productive worker, Social Market Foundation).

Flexible working and healthcare are just some of the employee benefits now considered as essential to existing and potential new employees to help them build or maintain a work-life balance. With this in mind, the Early Years team conducted the Employer Survey 2017 between August and December 2017, with a specific focus on childcare and what flexible arrangements are already offered by employers in Brent.

The survey identified that there is a need for employers to be more responsive to accommodate employees' and potential employees' range of needs. Just over half of the responders (86 out of 152) offer part-time working arrangements, less than a third (44 out of 152 responders) offer flexitime, and just over one fifth (34 out of 152 responders) offer term time/school hours working. This has shown that there is a need for some work to be carried out promoting the benefits of employee welfare and employee benefits, to be delivered in partnership with relevant voluntary organisations and the Employment, Skills and Enterprise team.

As of December 2016, a total of 9,500 Brent households were classed as Workless households, and as of December 2017, there were 4,810 Brent residents claiming out-of-work benefits (source: Labour Market Profile: Brent, Office for National Statistics). The survey also identified that only 64 out of the 152 responders recognised that posts in the last 24 months were not filled/taken up due to childcare issues. It became apparent that a means of combatting this trend would be to raise awareness within the HR or recruitment teams, who could then promote the childcare offers and support/advice service of the CFIS team to potential employees.

When asked what improvements needed to be made to childcare for the recruitment and retention of employees, 66 out of 152 responders selected "more affordable" as an option. By promoting the childcare offers to employers, a greater awareness of the free

entitlements (15 hours, 30 hours) and other financial support available to families could help.

Recommendations

(i)

The following actions have been agreed:

- All responders were sent an email thanking them for their participation and offering a chance to send out a set of three A3 posters for display in staff areas. 27 responders replied and were sent posters.
- The responders who expressed interest in outreach from a member of the CFIS team have been contacted and arrangements are being made for this to be carried out. Subject to availability, it is expected that these visits will be carried out by April 2018.

The following actions are recommended:

- Continue to work with the Employment, Skills and Enterprise team and build on their existing relationships with employers in the borough to promote childcare and the CFIS.
- Carry out visits to at least 42 employers in the borough (suggest 2 in each ward) around employee welfare/benefits, with a particular focus on the childcare offers available, by the end of 2018.
- Develop additional means of outreach to families in the borough to promote the current childcare offers. This could be in a more creative or innovative way (new events, marketing, etc.) or by further developing relationships with community groups and being more visible. These would be delivered over the course of 2018/19 on a trial-basis.
- A sustained social media marketing campaign – at least two posts/'shout outs' per platform per month for 2018 – would help to raise the profile of the CFIS team and the childcare offers, not just with employees but also with any employers who follow Brent Council.

The output of these actions, if completed, would be:

- To embed the CFIS and childcare offers in the HR processes and policies by building on the existing relationships with employers.
- To promote the services available from the Early Years team (and Brent Council, where required) for employers and influence updates and changes to HR policies.
- To raise the profile of services available, with a particular focus on the Early Years team, which would result in more awareness within hard-to-reach communities and groups.
- An increased awareness with the more tech-mobile generation, which would result in an increased take up of childcare spaces and employment in younger generations.

The impact of these outputs would be:

- More Brent residents in gainful employment, so greater social mobility within the borough.
- An increase in young and/or vulnerable children taking up their free early years entitlement, which would mean they are better prepared for school, and later employment.

Appendix C – Atypical hours provision

Figure 1 Settings offering weekend opening



Figure 2 Settings open before 0800 weekdays

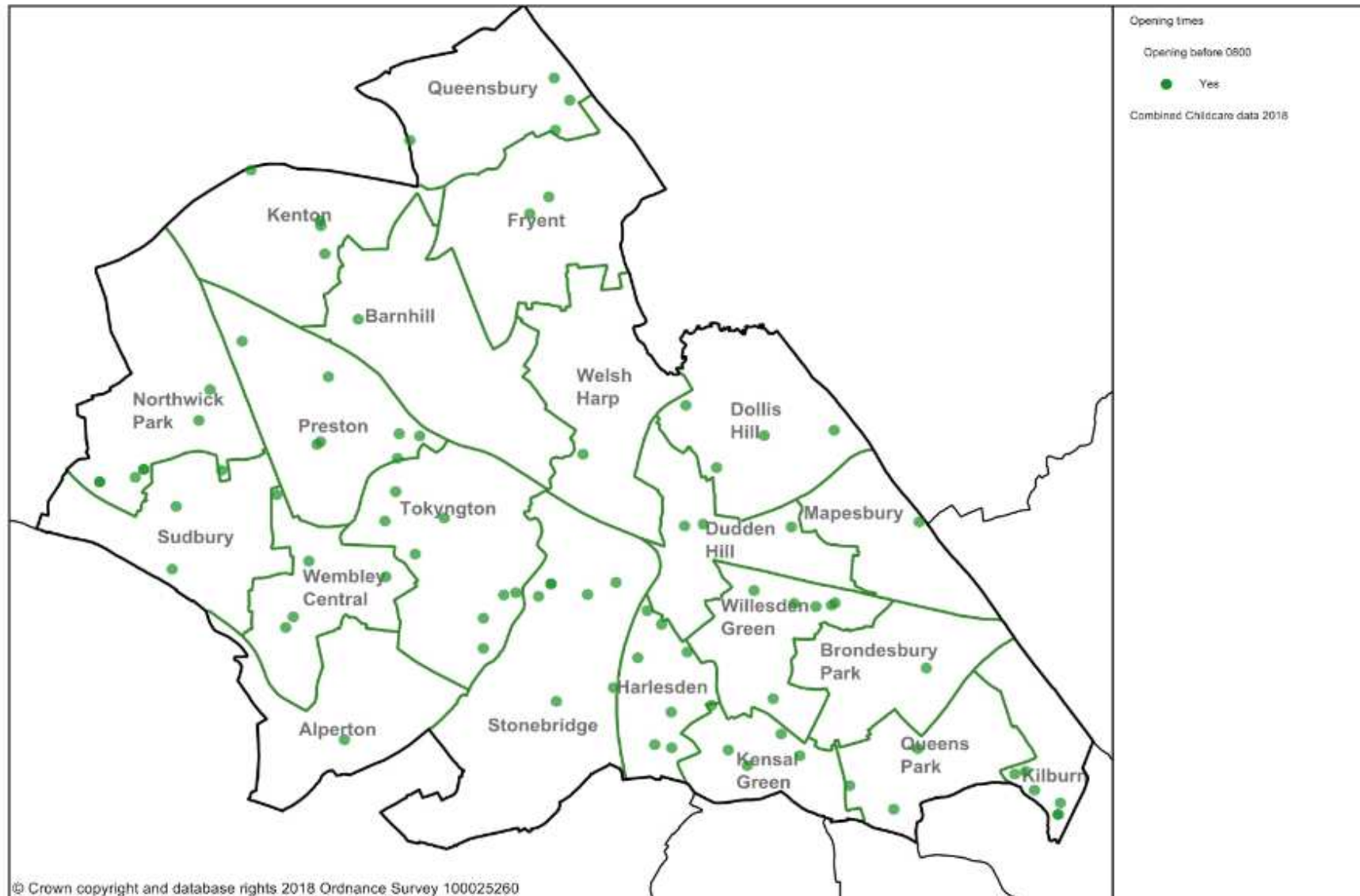


Figure 3 Settings open after 1800 weekdays

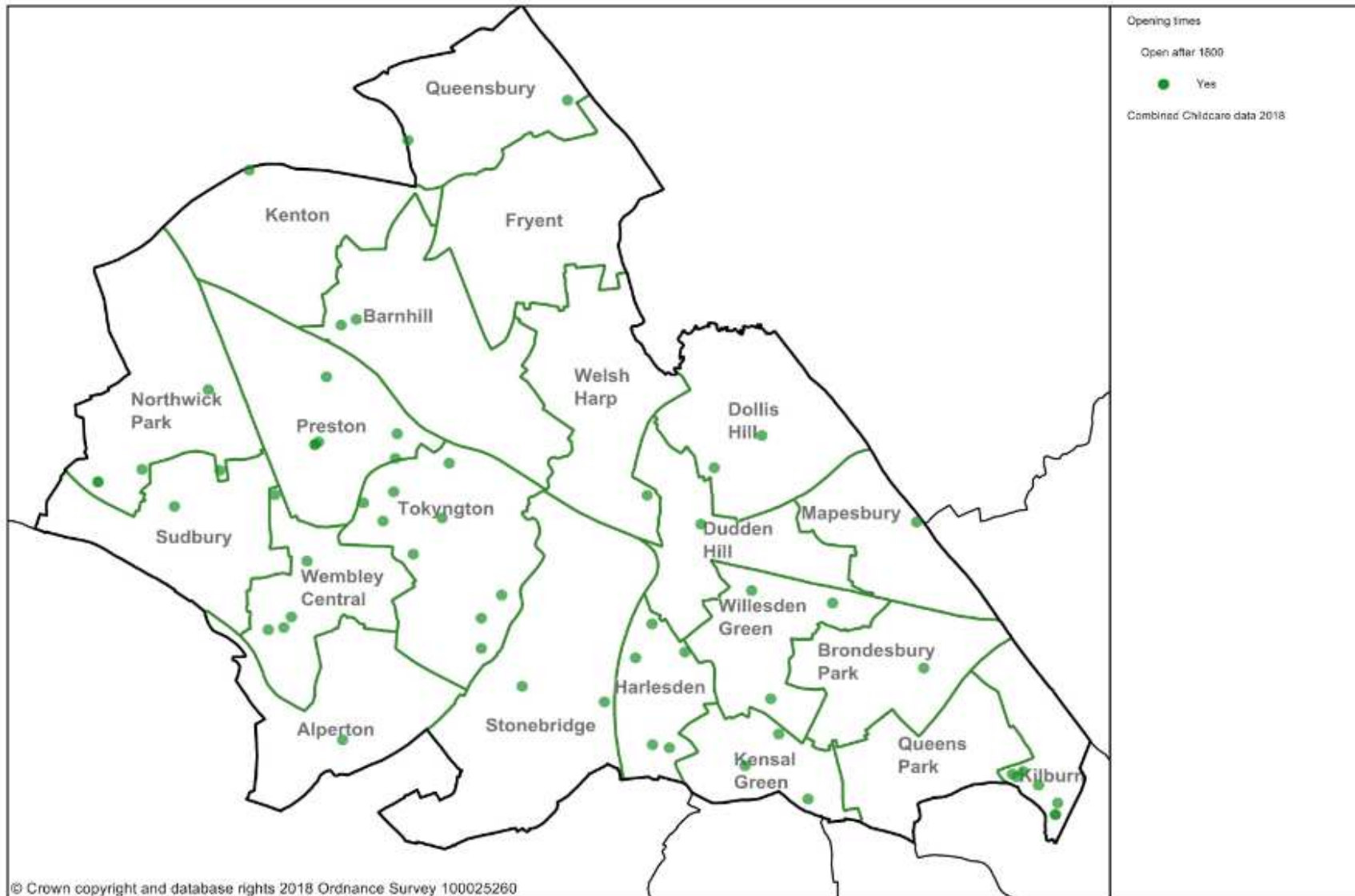


Figure 4 – Breakfast clubs opening earlier than 0800

