



Childcare Sufficiency Assessment 2019

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1. Executive summary

Newham Council is required to 'report annually to elected council members on how they are meeting their duty to secure sufficient childcare, and make this report available and accessible to parents'. We have prepared this report in order to meet this duty.

Having sufficient childcare means that families are able to find childcare that meets their child's learning needs and enables parents to make a real choice about work and training. This applies to all children from birth to age 14, and to all children with disabilities. Sufficiency is assessed separately for early years children (0-4) and for school aged children (5+) and analysis is made at borough and ward level.

Newham's last childcare sufficiency assessment (CSA) was published in 2018. This new assessment compares how the provision of childcare for under-fives and school age children has changed since then and takes a view on the current sufficiency of provision. The structure of the assessment reflects the template provided by the Greater London Authority.

Four key issues have been considered:

- The current level of demand for childcare and funded early education
- The factors that influence the take up
- The current level of supply of childcare and funded early education
- The gaps in sufficiency and recommendations for the local authority and its partners in closing the gaps identified.

1.1 Main findings

Overall there is a small improvement in the number of places available for under 5 children, compared to the CSA 2018. According to Greater London Authority (GLA) data, the under fives population of Newham has decreased marginally by 200 places (0.7%) since 2018. The overall number of places available has edged up by 31 places (0.6%). The borough average is 1 full time equivalent place for every 6 resident under 5 children. This has improved slightly year-on-year.

Newham has historically had a wide variation in the number of childcare places available in different wards of the borough. While this remains true, there is some improvement in the places available in the wards with least provision. In 2019 the ward with the least provision, East Ham South, has 66 full time places located in the ward, where Boleyn, the ward with the least provision in 2018, had only 17. The net effect is that there are more places available in wards which have had a historically lower number of places. In 2019 there are 5 wards located in the centre of the borough where the number of places per resident child are less than half of the borough average. These wards are being prioritised in the CSA action plan. They are East Ham South, Boleyn, Green Street East, Plaistow South and Plaistow North.

There continues to be an improvement in the overall quality of provision in the borough to meet families' needs and more parents now say that they have been able to access good or outstanding provision. The quality of group care continues to rise, with 93% of providers achieving a good or outstanding Ofsted judgement. This matches the London

average but is still below the 97% of providers achieving this across England. Similarly Childminding Ofsted ratings have improved and match the London average of 84% achieving good or outstanding but are below the England average of 95%.

The range of service options for under- fives has increased since 2018. Schools are increasingly participating in 30 hours and chargeable childcare and more registered childminders are offering funded places. Earlier starting and later ending times are more common to meet the needs of working parents. More providers that deliver funded early education now offer a stretched offer across the year, but it is likely additional stretched places will be needed for working parents. 78% of parents surveyed in Newham say they have been able to find childcare that offered the hours to fully meet their needs.

The last year has seen the bedding in of a number of recent Government initiatives, impacting on early years provision. This includes the early years national funding formula, extended “30 hours” early education and childcare offer for working parents, tax free childcare, the disability access fund and the early years inclusion support fund.

The 30 hours scheme has seen a significant increase in take up since its introduction in September 2017. At January census 2019 there were 1,129 children benefitting and a new high of 1,514 children were receiving extended funded hours in Newham in the summer term 2019. Comparing term on term take up over the last 6 terms, an increase of 15.1% has been achieved. There is now more choice for parents with an increase in the number of providers offering places, where strong growth has been achieved, particularly in school participation. The wards with the lowest number of unused places in the summer term 2019 were Canning Town North, Green Street East, Green Street West, East Ham North and Stratford and New Town. It is projected that demand will continue to grow to a new peak of 1,813 required places by summer 2020.

The targeted two year old early education scheme has seen a modest increase in take up in Newham of 2% to 52% at January census 2019. This remains below London and England averages. There has been a wide range of actions to stimulate demand over the last year including the work of Sheringham GLA hub, the introduction of a “Golden Ticket”, continuation of follow up work with non engaging parents, introduction of parent champions, regular briefings for partners, a refreshed communication plan and new marketing materials. There has been some decline in the number of places available to the scheme from private voluntary and independent providers and evidence of some switching to the 30 hours offer. The wards with the lowest number of unused places in the summer term 2019 were Plaistow North, Royal Docks, Boleyn, Canning Town North and Plaistow South.

Take up of the universal early education has remained static at 82% at January census. This is in line with London averages but is significantly below England averages.

London has the lowest take up rate for both 3 and 4 year old universal entitlement and the targeted 2 year old entitlement. Recent research commissioned by the Department for Education concludes that “language, population mobility of children aged 0-4 and SEND may be particularly important for explaining take up rates. In London, the super-diversity of the population and its higher population mobility, in combination with higher

costs to provide childcare, appeared to contribute to lower take up rates.”¹ The particular social and economic characteristics of Newham detailed in this report mean that there is significant challenge in driving up take up of the funded free entitlements.

In order to offer places, providers must be sustainable and occupancy is a key driver of sustainability. Overall recorded occupancy rates for under-fives provision in group care has marginally improved from 59% to 61%. For childminders occupancy has fallen from 55% to 45% and a polarisation of occupancy is experienced with majority of childminders being either full or close to full or empty or nearly empty. Childminders have identified their biggest business challenge as recruiting and retaining children. There remains underutilised capacity to varying degrees across the borough.

Parental fees for chargeable childcare in Newham have increased above inflation with day nursery charges increasing by 4.7% and childminder fees by 10.8%. Reasons for this include changes to minimum wage and pensions, food costs and business rates. Though charges remain lower than London averages, 40% of parents surveyed said that they had affordability issues in accessing childcare in Newham.

Funded early education and other government schemes to help with childcare costs can support parents to access affordable provision. Awareness of these schemes appears to be lower in Newham than nationally. Our parent survey indicates that around three quarters of parents are aware of the funded entitlements and only about half of parents were aware of subsidy schemes such as tax free childcare and the childcare element of tax credits. With seven types of childcare support being available depending on families' circumstances it is important that parents are informed of the support available to allow them to benefit.

For over-fives, there has been an improvement in quality with 93% of providers now good or outstanding.² There is wide variation in the quantity of recorded provision in each ward. The wards with the least recorded places per resident for over-fives are clustered around the north and east of the borough and include Green Street East, Wall End, Green Street West, Little Ilford and Boleyn and overall there is a decline in the recorded places available. Recorded school provision is relatively full at 78%, while private and voluntary group care settings are 53% occupied and childminders 32%.

Over-fives provision in this CSA includes out of school services operating from schools. Schools provide a range of activities which may not be formally classed as childcare and are generally not required to be separately registered. However, they provide a significant contribution to care for children in this age range. Although this year's CSA gives a fuller picture of what is available, further work will need to be done to get a complete picture of provision as not all schools (32) responded to the CSA survey.

Charges for out of school services in Newham have increased above inflation. Help with childcare costs is available for eligible parents to access Ofsted registered provision and parents need to be made aware of this.

¹ DfE Take Up of the free early education entitlements Research Report September 2018 Natcen Social Research & Ask Research

² Taking into account the Ofsted grades of schools recorded with out of school activities according to survey

Looking ahead, GLA population estimates³ for the borough show an increase child population of 1.7% by 2022 and by 13.9% by 2029. Changes at ward level are projected to be coming through by 2022 with increases in Stratford and New Town, Royal Docks and Canning Town South, being offset by smaller decreases across a number other wards. In the longer term, there are large increases in child population projected for the west and south of the borough, including Stratford and New Town, Canning Town North, Royal Docks, Canning Town South and Beckton. Demand for childcare can be predicted to increase, with need fluctuating at ward level to reflect housing and regeneration project implementation. The borough will want to share market information and opportunities with providers so that they can respond to changing parental demand.

The benefits of early education for child development are well established. High quality early education and childcare has strong and lasting benefits for children and is also necessary to allow many parents the opportunity to work or study. The CSA 2019 has found improvements in quality and small improvements in the overall quantity, distribution and range of service provision available to residents. Holistically there is enough early education and childcare, but there remain shortfalls in particular wards with regard to full time childcare places, for the early education entitlements and for out of school services for over fives.

The market for childcare has changed. There is more funded or subsidised care available to parents, greater participation in childcare by schools, higher delivery costs for all providers, continuing complexities around help with childcare costs for parents and early years funding rules now restrict the level of support local authorities are able to provide.

In Newham the introduction of 30 hours has been a success and has seen substantial increases in the number of working families benefiting from funded extended childcare. The same rate of progress can not be said to have been made in relation to the targeted 2 year old scheme and take up of the universal offer is low and not improving. This is despite a lot of activity to stimulate demand and support supply. Recent Department for Education (DfE) research evidence which looks at reasons for low take up in London can help shape Newham's action plan to make improvements that will allow those groups not currently accessing services to benefit.

Looking further ahead, predicted demographic growth in Newham over the next 10 years will need a remodelling of the local early education and childcare offer.

The Local Authority can help shape the market to meet changing early education and childcare needs by:

- Ensuring Newham parents, from all backgrounds, are well informed about the early education and childcare options available and the help with childcare costs that can support access to childcare.
- Supporting providers with information, best practice guidance and training to allow them to adapt to the changing market for childcare, allowing them to meet parental demand.

³ Greater London Authority (GLA) Population Projections Central Trend Based Projection (published July 2017)

- Maximising opportunities to stimulate childcare development in areas of need through partnerships, business support and accessing any available funding.
- Ensuring efficient arrangements are put in place to support funding eligibility checking and improving payment arrangements for delivery.

1.2 Progress against Childcare Sufficiency Action Plan 2018

A detailed action plan was developed, following the completion of the CSA 2018. Progress against agreed actions were regularly reviewed by Officers and progress updated on a monthly basis. Key actions achieved included the dissemination of the CSA findings with new and existing providers, delivery of early education briefings to partners, development of early years content for Local Offer website, a new early years communications plan and refreshed early education entitlement materials, promotion of tax free childcare, monthly 234 newsletter to providers, delivery of business support training, implementation of quality improvement strategy and pathway to quality scheme, childminder induction programme, support for childminders through early education practitioners, introduction of “Golden Ticket” for 2 year olds and continuation of follow up with families not engaging, development of new 2 and 30 hours places in target wards, introduction of a parent champions scheme, work with Sheringham GLA hub including Bangla TV appearance promoting the two year old offer, recommissioning local offer to deliver a range of services for children with special educational needs or disabilities and review of payment arrangements for funded entitlements.

1.3 Gap Analysis and Recommendations

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

1.3a Information gap

With the introduction of the extended 30 hour early education and childcare offer and tax free childcare, there is now more funded and subsidised help with childcare costs than ever before. There are now seven schemes parents can potentially benefit from. Chargeable childcare rates are rising at above inflation.

Newham, like London, has a low take up of funded 2 and universal 3 and 4 places. Evidence points to the fact that take up is associated with “region, disadvantage, English as an additional language, ethnicity, population mobility and employment status.”⁴ Also, to date, the take up of the new tax free childcare scheme is also lower than expected.

Lack of awareness and misconceptions about eligibility are barriers to take up. More needs to be done to provide tailored information and support to target families that simplifies the parents customer journey, addresses language barriers and parental

⁴ DfE Research report Take up of free early education entitlements September 2018

concerns, and, where appropriate and resources allow, a hand holding service to secure a childcare place.

Information Recommended Actions

- To promote the “Local Offer” website which will allow bespoke search facility to allow parents to access specific childcare information pertinent to their needs, including the ability to translate into different languages.
- To renew the early years communication plan, taking into account evidence from research with regard to the target audience and what has been shown to be most successful in engaging families and to look at the option of promoting early education entitlements scheme materials in different languages.
- To expand the parent champion volunteers programme to support parents access across all early education and childcare. To ensure that there is good representation from those who speak the community languages of the borough.
- To continue to ensure that local sources of advice and support such as Families Information Service, Childcare providers, Health Visitors, Children’s Centres, Job Centre Plus, and Workplace are aware of and disseminate the latest information. This will include briefings to all key partners and the distribution of relevant marketing materials.
- To promote the government’s websites www.childcarechoices.gov.uk and www.gov.uk/childcare-calculator to parents and providers. These set out Government childcare offers and support available to parents, including the Tax-Free Childcare scheme and 30 hours, the 15 free hours, tax credits, Universal Credit and childcare vouchers.
- To raise awareness of the range of childcare options that are available to meet different parent needs including the stretched offer, flexible care available through some childminders or partnership delivery and services available to shift and weekend working parents.
- To facilitate the sharing of provider information to parents with regard to how they support SEND, language development, cultural, faith and belief needs.
- To keep participating providers aware of developments around funded entitlement through the Local Authority newsletter “234”, and via appropriate forums, support and monitoring meetings.
- To improve the information that is available to parents with regard to the out of school services available in Newham.

1.3b Sustainability gap

The commissioned Ceeda report on the cost of childcare in Newham 2017 identifies some sustainability challenges for providers in particular sectors or those with low occupancy or small size of operation. Occupancy levels for private, voluntary and independent sectors remain low at 61% overall and childminder occupancy is 45%. Some schools have also reported unfilled places in their nursery classes. Some providers will need support to review their business models, and adapt their services to meet parents' needs. Childminders identify attracting customers as their biggest business challenge, group care settings identify the recruitment and retention of staff.

Sustainability Recommended Actions

- To deliver start up business briefings for new settings or those looking to deliver funded entitlements for the first time.
- To refresh the start up pack issued to all prospective providers of early education and childcare in Newham.
- To deliver training for childminders with low occupancy, in strategies to promote their service and to be confident in parental partnership in order to retain families.
- To continue to support management training and quality improvement tools to strengthen strategies and skill for setting managers in the recruitment and retention of staff, including the HEYL component on staff well-being.
- To continue to work in partnership with Newham Adult Learning to support the development of a quality workforce, including the childminder induction programme
- To continue to deliver the business component on the new childminder induction programme.
- To encourage parents to take up places in available good quality provision and not delay taking up a place while being held on preferred provider waiting lists.
- To review and consult providers on payment arrangements for funded early education from April 2020.

1.3c Quality gap

Strong progress had been made with the quality of childcare across the sector in Newham, and Ofsted outcomes have continued to improve since the last CSA in 2018. Newham is now on a par with the averages for London but remains below the national benchmark.

Quality Recommended Actions

- The Best Start in Life (BSiL) team have a quality improvement strategy in place in order to continue to improve practice in Early Years, as well as raise the Ofsted profile. The collaborative Early Years Project (CEYP) continues to be embedded as a model of effective setting support. The Local Authority continues to support practice development in all Statutory settings, new settings and Good and Outstanding settings which have been identified as needing leadership support. Universal support is available to all settings through the CEYP, including an integrated CPD programme. The Sheringham GLA hub project, which is in place for three years, works alongside this. One of the key outcomes aimed through the Hub project is to increase the number of Outstanding settings, through the “Good to Great” programme.
- The BSiL team will continue to support providers to use Newham’s Pathway to Quality tool to develop self evaluation and identify plans for improvement. New settings and those judged to be “Requires Improvement” or “Inadequate” will receive intensive support and access workshops to improve and develop leadership.
- Early Education Practitioners will continue to support childminders through the Children’s Centres network meetings on a weekly basis, run CPD and support the quality audit. Pathway to Quality will be introduced in this sector from September.
- Newham’s Best Start in Life CPD programme is available to all providers and childminders. A childminder induction programme has been developed in partnership with Newham Adult Learning Service (NALS), and with delivery input from the BSiL team and EEPs, and will continue to be delivered to ensure the best quality workforce entering the profession. Engagement from NALS will also work towards effective initial training and CPD across the sector.

1.3d Two year old early education gap.

A small improvement in take up has been achieved compared to the CSA 2018, but this lower than London or national averages. There has been a decline in the number of places made available to the scheme, but overall there remain surplus places that are adequate to meet overall demand. There remain areas of the borough where there are very few spare places. There are only a handful of schools participating on the scheme which may be impacting on take up.

Two year old Recommended Actions

- To join up the development of additional two year olds places with the development of thirty hour places for three and four year olds to support sufficiency across all funded delivery.

- To deliver a capital scheme at Grange Primary school, enabling the creation of 26 new 2 year old places in Canning Town North ward by September 2020.
- To continue to explore development opportunities in areas with a low number of unused places (Plaistow North, Royal Docks, Boleyn, Canning Town North and Plaistow South). To work with place planning colleagues to identify schools with potential to meet place development needs in high priority areas for funded entitlements.
- To refresh the “New to Two” pack for schools interested in delivering funded two year old places.
- To continue to work with Sheringham GLA working together hub project to share lessons and issues and develop new strategies to support a higher take up of the two year old offer.
- To continue the “Golden Ticket” direct approach for the 2 year old scheme with a follow up by staff with a dedicated role to promote funded early education.
- As part of the refresh of the early years communications plan, to ensure information is available in easy read English and explore use of community languages in promotional literature, follow up and support services for parents looking to access the scheme.
- To implement the communication strategies relevant to the two year old scheme as identified at 1.3a
- To share the findings of the CSA with providers and potential providers in the borough via briefings and information packs.

1.3e Three and four year old early education gap.

Take up of the universal entitlement has flat lined at 82% and mirrors the low take up in London. More needs to be done to ensure that all parents are aware of the universal offer so that they can make informed choices as to whether to participate.

Places for 30 hours are relatively full in the peak summer term (80%). It is likely that demand by summer 2020 will be significantly higher and at that point more places will be needed for the scheme. Working parents have varied needs and preferences in terms of delivery. There needs to be a range of provision to meet varied working parental needs including term time and year round offers and places across all provider types including offers that link to fee paying hours outside of the 30 hour scheme.

Three and four year old Recommended Actions

- To bring on stream 26 new 30 hours places following the completion of capital works at Selwyn School.
- To continue to explore development opportunities for 30 hours development in wards with a low number of unused places (Canning Town North, Green Street East, Green Street West, East Ham North, Stratford and New Town, Custom House and Plaistow South). To work with place planning colleagues to identify schools with potential to meet place development needs in high priority areas for funded entitlements and engage with target schools to develop places.
- To refresh the start up pack available to settings looking to offer 30 hour places.
- To further develop the support programme for settings considering or starting 30 hours places including briefings, best practice and buddying opportunities.
- To refresh the early years communication plan and the actions relevant to universal and 30 hours provision for 3 and 4 year old early education schemes as identified at 1.3a. This will include exploration of the use of community languages in promotional literature, follow up and support services for parents looking to access the schemes.

1.3f Location gap in supply.

Although there has been some improvement in places available in target wards, the number of places per resident child varies significantly between wards.

For under-fives the least places per resident child are mostly clustered around the centre of the borough.

For over-fives the least places per resident child are clustered around the north and east of the borough.

Location Recommended Actions

- To share the CSA and highlight the shortage of supply of places in specific wards with strategic leads for planning. Work with strategic planning to support suitable developments to meet the local need.
- To disseminate the findings of the CSA to new and existing providers to make them aware of the potential for development in the wards with low supply.

- To target any funding or development opportunities for provision expansion in early years at wards with the lowest supply.

1.3g Disabled Children gap

Data relating to disabled children needs, is held within the 0-25 SEND Service. The local authority is committed to support the range of private, maintained and voluntary organisations to achieve early identification of need and ongoing inclusive practice in support of children with SEN and disabilities. The LA areas SENCO team is well established and their work is improving the quality of provision and practice for children with SEN and disabilities in the PVI sector. A recent project between the LA and NASEN, and funded by the DfE, is supporting the upskilling of the workforce. The L3 accredited SENCO training has resulted in 21 early years practitioners gaining this qualification and leading SEND practice in their settings from an informed perspective.

Disabled Children Recommended Actions

- The Council needs to continue its work to improve the process for the collection of accurate statistical data for children with disabilities and/or special educational needs: From 1/9/19 the Health notification will be coordinated and triaged through the BSIL team to ensure a more co-ordinated approach to bringing to. More work on this needs to be done because whilst the Disabled Children's Register has been established, the numbers registered are too small to influence commissioning.
- The **Newham Local Offer** is now in place but needs to be updated termly to reflect the changes being brought about by to the transformation of the way services are commissioned. This will ensure parents can access clear and accessible information on a range of services and support for children and young people with special educational needs and/or disabilities (SEND).

2. Introduction

Childcare sufficiency assessment 2019

In this report, we have made an assessment of sufficiency using data about the need for childcare and the amount of childcare available, and feedback from local parents about how easy or difficult it has been for them to find suitable childcare. We use information about childcare sufficiency to plan our work supporting the local childcare economy.

3. Demand for services

3.1 Economic and social conditions

3.1a Demographic Profile

Newham has one of the youngest and most diverse populations in the country; and had the third highest proportion of 0 to 4 year olds nationally (8.2%), based on 2011 UK Census data⁵.

The 2011 UK Census data recorded Newham's population as 307,984; this was the 7th largest in London. 25,384 residents were aged 0 – 4 years.

Newham's projected population for 2019 increases to 356,900⁶. Of these 28,600 children are aged 0 to 4 years. This is a small decrease of 200 (0.7%) compared to the number reported in the CSA 2018.

Child population in each year

The early years child population in each year is shown below in table x and these children may require early years childcare.

Table 1 Population Numbers by age 0-4

Age	Number of children
Age 0	6,200
Age 1	5,900
Age 2	5,700
Age 3	5,500
Age 4*	5,300

* Some four-year-olds will have started reception

Population of school age children

The school age children in each year are shown below in table 2 and these children may require childcare before and after school, and/or during the school holidays. There are 48,600 children are aged between 5 and 14 years old. This is an increase of 1,200 children (2.5%) compared to the number reported in the CSA 2018. The total child estimate for 0-14 year olds is 77,200 in 2019.

Table 2 Population Numbers by age 5-14

Age	Number of children
Age 5	5,500
Age 6	5,500
Age 7	5,500
Age 8	5,200

⁵ GLA CIS - Update CIS2012-01.

⁶ Greater London Authority (GLA) Population Projections Central Trend Based Projection (published July 2017). Figure has been rounded to the nearest one hundred so that some total borough and ward level figures may vary slightly in this report.

Age 9	4,900
Age 10	4,700
Age 11	4,700
Age 12	4,300
Age 13	4,200
Age 14	4,100

Under 5s Ward Analysis and Future Projections

Table 3 shows projected shows projected under 5 populations at ward level over the period 2019 to 2029.

In the short term the overall number of 0-4 year olds in Newham is projected to be relatively stable. By 2022, overall numbers are projected to increase by 400 (1.4%). Underlying this there is some significant fluctuation at ward level with expected increases in Stratford and New Town (550), Royal Docks (400) and Canning Town South (200), being offset by smaller falls of up to 100 places in a number of wards located in East Ham, Forest Gate, Green Street and Plaistow.

Looking further ahead to 2029 overall under 5 numbers are predicted to increase by 4,800 (17.3%) to 33,850. At this point, major increases in 0-4 children are expected in the Stratford and New Town (2,250), Royal Docks (1,100) and Canning Town North (1,000) wards. Significant increases are also expected in Canning Town South (800) and Beckton (700). The largest falls in 0-4 population are projected for Green Street East (150) and Green Street West (150), East Ham North (150), Wall End (150) and West Ham (150).

Table 3

GLA population projections for Newham Wards 0-4 Year Olds					Projected change	Projected change	Projected change
Ward	2019	2022	2024	2029	2022	2024	2029
Beckton	1,200	1,300	1,400	1,900	100	200	700
Boleyn	1,450	1,500	1,550	1,650	50	100	200
Canning Town North	1,500	1,600	1,700	2,500	100	200	1,000
Canning Town South	1,550	1,750	1,850	2,350	200	300	800
Custom House	1,150	1,100	1,050	1,250	- 50	- 100	100
East Ham Central	1,400	1,350	1,300	1,650	- 50	- 100	250
East Ham North	1,200	1,100	1,050	1,050	- 100	- 150	- 150
East Ham South	1,450	1,400	1,350	1,350	- 50	- 100	- 100
Forest Gate North	1,150	1,100	1,000	1,050	- 50	- 150	- 100
Forest Gate South	1,550	1,450	1,350	1,450	- 100	- 200	- 100
Green Street East	1,600	1,500	1,450	1,450	- 100	- 150	- 150
Green Street West	1,450	1,350	1,250	1,300	- 100	- 200	- 150
Little Ilford	1,700	1,650	1,550	1,650	- 50	- 150	- 50
Manor Park	1,450	1,400	1,350	1,350	- 50	- 100	- 100
Plaistow North	1,400	1,350	1,250	1,300	- 50	- 150	- 100
Plaistow South	1,600	1,550	1,450	1,500	- 50	- 150	- 100
Royal Docks	1,400	1,800	2,050	2,500	400	650	1,100
Stratford and New Town	2,200	2,750	3,000	4,450	550	800	2,250
Wall End	1,350	1,250	1,200	1,200	- 100	- 150	- 150
West Ham	1,100	1,000	900	950	- 100	- 200	- 150
Newham Total	28,850	29,250	29,050	33,850	400	- 200	4,800
% Change against 2019					1.4	0.7	17.3

0 – 14 Ward Analysis and Future Projections

Table 4 shows projected shows projected populations for 0-14 year olds at ward level over the period 2019 to 2029.

By 2022, the overall number of 0-14 year olds in Newham is projected to increase by 1.7%. At ward level there is some significant change with expected increases in Stratford and New Town (1,150), Royal Docks (800), Canning Town South (450) and Canning Town North (400), being offset by falls in East Ham South (250), West Ham (200), Wall End (200) Little Ilford (200), Forest Gate North and smaller falls in other wards.

The number of 0-14 year olds in Newham is projected to increase by 13.9% to 88,250 by 2029, as is shown in Table 2. Major increases in 0-14 children are expected in the Stratford and New Town (4,900), Canning Town North (2,650), Royal Docks (2,400), Canning Town South (1,800) and Beckton (1,350) wards. The largest falls in 0-14

population are projected for West Ham (500), Plaistow North (500) and Wall End (450) wards.

Table 4

GLA population projections for Newham Wards 0-14 Year Olds					Projected change	Projected change	Projected change
Ward	2019	2022	2024	2029			
Beckton	3300	3550	3650	4650	250	350	1,350
Boleyn	4350	4450	4500	4750	100	150	400
Canning Town North	4200	4600	4900	6850	400	700	2,650
Canning Town South	3800	4250	4450	5600	450	650	1,800
Custom House	3300	3250	3200	3500	-50	-100	200
East Ham Central	3800	3700	3600	4300	-100	-200	500
East Ham North	2800	2700	2600	2700	-100	-200	-100
East Ham South	4450	4200	4050	4100	-250	-400	-350
Forest Gate North	3250	3050	2900	2900	-200	-350	-350
Forest Gate South	3900	3850	3700	3800	-50	-200	-100
Green Street East	4250	4200	4050	4050	-50	-200	-200
Green Street West	3700	3650	3500	3450	-50	-200	-250
Little Ilford	5000	4800	4650	4850	-200	-350	-150
Manor Park	3550	3400	3300	3350	-150	-250	-200
Plaistow North	4050	3950	3750	3550	-100	-300	-500
Plaistow South	4350	4200	4050	4100	-150	-300	-250
Royal Docks	3250	4050	4550	5650	800	1,300	2,400
Stratford and New Town	4600	5750	6450	9500	1,150	1,850	4,900
Wall End	4150	3950	3750	3700	-200	-400	-450
West Ham	3400	3200	3000	2900	-200	-400	-500
Newham Total	77,450	78,750	78,600	88,250	1,300	-150	9,650
% Change against 2019					1.7	1.5	13.9

Population Mobility

The average population mobility for 0 to 4 years across English Local Authorities is 10%. The London average for population mobility is higher than the national average at 14%⁷.

3.1b Deprivation & Poverty

Based on the 2015 Indices of Deprivation (ID), Newham is the 8th most deprived area in England and the 4th most deprived in London.⁸ This is an improvement on the previous assessment which showed Newham was the 3rd most deprived area in England and the 2nd most deprived in London⁹.

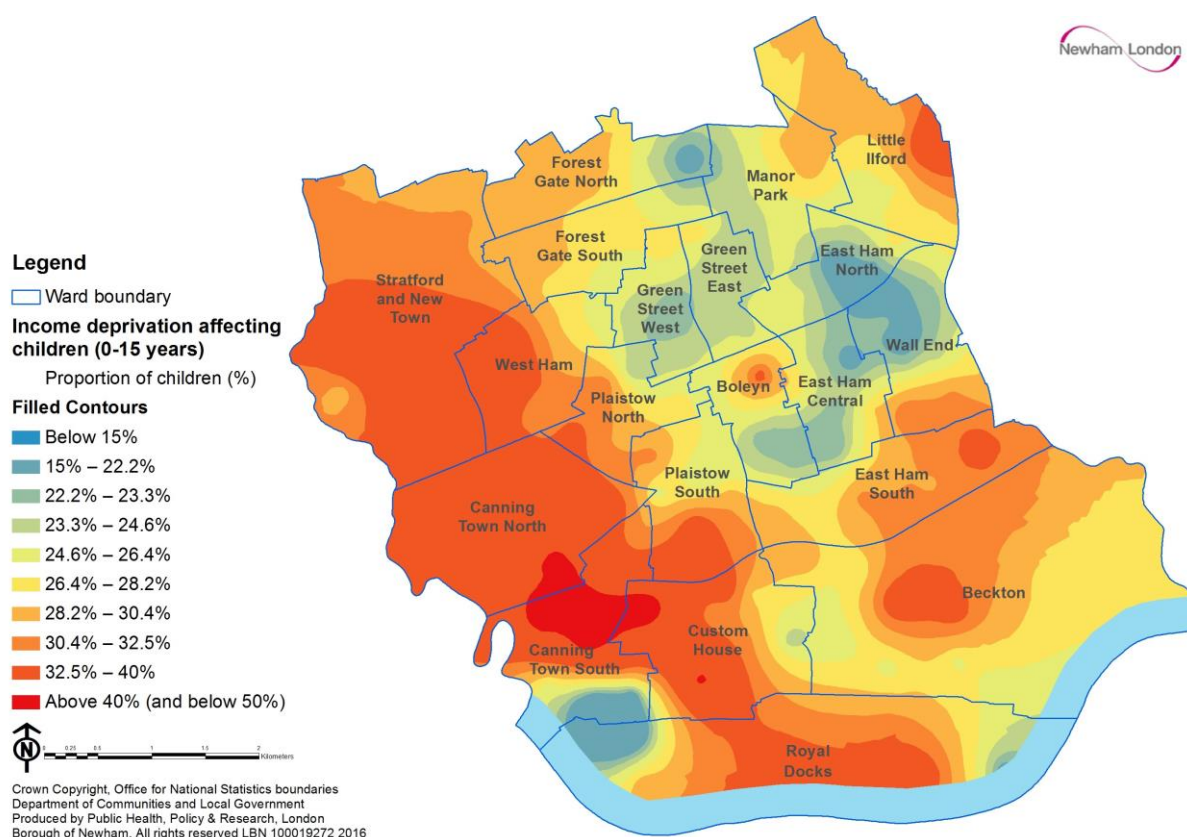
⁷ Office for National Statistics internal migration by LA and Region 2018

⁸ This is based on the Rank of average rank measure. <https://www.gov.uk/government/collections/english-indices-of-deprivation>

⁹ The English Indices of Deprivation 2010, Commission by Communities and Local Government. Oxford Consultants for Social Inclusion (OCSI) - Headline results from the Indices of Deprivation 2010 March 24th, 2011. The English Indices of Deprivation is currently being updated and is due to be published in September 2015.

Supplementary Indices are produced in addition to the 2015 ID; one being the Income Deprivation Affecting Children Index (IDACI). Newham ranked 7th in England and 5th in London, based on the IDACI rank of average rank measure. Map 1 below denotes three main trends with high deprivation in the West of the Borough, low deprivation in the Northeast quadrant and a more mixed picture in the Southeast.

Map 1 Heat Map of Newham using income deprivation affecting children index¹⁰



Out of work benefits data shows that 9,150 children (0 to 15 years) in Newham were living in all Out-of-work Benefit Claimant Households in May 2017. 2,920 were aged 0 to 4 years, 3,350 were aged 5 to 10 years, 2,880 aged 11 to 15 years and 10,820 aged 0 to 18 years. The total number of households is 5,690¹¹. 20.1% of children under the age of 16 years were believed to be living in low income families in Newham (2016)¹².

3.1c Ethnic Diversity

One of the most striking features of Newham is its diversity.

¹⁰ Newham Children and Young People Joint Strategic Needs Assessment (JSNA) 2017

¹¹ Official Statistics Children in out-of-work benefit households: 31 May 2017 <https://www.gov.uk/government/statistics/children-in-out-of-work-benefit-households-31-may-2017>

¹² Data extracted from <https://data.london.gov.uk/dataset/children-poverty-borough?resource=bc68e453-e250-4bc1-9d60-165b5bef1979> source: H&M Revenue & Customs, this is also the source for Table 2.

Ethnic group projections¹³ for mid-2019, show that 86.8% of Newham's residents are from a background other than White British.

The largest (projected) ethnic group in Newham is Asian accounting for 45.5% of residents, followed by White 27.5%, Black 17.9%, Mixed/Multiple ethnic groups 5.0% and other ethnic group 4.1%. A more detailed breakdown is shown in Table 6 below.

Table 5: Mid-2019 Ethnic group projections: GLA Housing led variant

Ethnic group	Count	%
Indian	53,430	14.9
Pakistani	35,739	9.9
Bangladeshi	44,916	12.5
Chinese	5,788	1.6
Other Asian	23,827	6.6
Total	163,700	45.5
White British	47,630	13.3
White Irish	2,784	0.8
Other White	48,376	13.5
Total	98,790	27.5
Black African	40,023	11.1
Black Caribbean	14,918	4.1
Other Black	9,419	2.6
Total	64,360	17.9
White & Black Caribbean	4,097	1.1
White & Black African	3,967	1.1
White & Asian	4,004	1.1
Other Mixed	5,872	1.6
Total	17,940	5.0
Arab	4,622	1.3
Other Ethnic Group	10,060	2.8
Total	14,682	4.1

A breakdown of the ethnic make up of the borough by ward based on the 2011 census is shown below in Table 7.

¹³ Greater London Authority (GLA) 2016 round of demographic projections: housing-led ethnic group population projection variant. This is also the source for table 6.

Table 6 Ethnic Group Percentage Newham Ward based on 2011 Census

2011 ward	All usual residents	White	Mixed/multiple ethnic groups	Asian/Asian British	Black/African/Caribbean/Black British	Other ethnic group
Beckton	15,141	45.8	4.9	25.5	20.8	3.0
Boleyn	15,982	21.9	4.0	54.5	15.5	4.1
Canning Town North	14,810	40.8	5.7	20.7	30.0	2.7
Canning Town South	15,996	45.5	5.6	20.5	24.4	4.1
Custom House	13,411	46.5	5.7	16.1	28.6	3.1
East Ham Central	15,917	18.1	3.1	64.8	10.5	3.5
East Ham North	13,866	9.2	2.0	76.9	9.0	3.0
East Ham South	15,575	32.3	5.7	35.6	22.6	3.8
Forest Gate North	16,257	35.9	5.4	29.8	25.0	3.9
Forest Gate South	17,362	31.8	4.5	40.0	19.7	4.0
Green Street East	15,885	10.1	2.4	74.9	10.4	2.2
Green Street West	15,113	10.7	2.5	73.3	11.0	2.5
Little Ilford	16,633	18.0	4.4	53.4	20.7	3.5
Manor Park	15,318	18.5	3.8	59.6	15.2	3.0
Plaistow North	15,470	26.6	5.1	41.8	22.8	3.6
Plaistow South	16,404	32.7	4.7	35.6	23.3	3.7
Royal Docks	10,679	45.9	5.9	20.4	24.3	3.4
Stratford and New Town	17,768	40.8	5.5	28.3	21.3	4.0
Wall End	14,846	17.8	3.2	63.6	11.5	4.0
West Ham	15,551	34.5	6.6	29.3	26.0	3.7

In Newham the percentage of pupils whose first language is not English is 58.8%, compared to 29.3% for London and 15.7% nationally.¹⁴ The percentage of adults who speak English at home in Newham was 63% in 2018¹⁵.

Eight in ten (81%) Newham residents regard themselves as belonging to a religion. The single largest group identify as Christian (38%), followed by those who identify as Muslim (34%), seven per cent of residents are Hindu and two per cent are Sikh.¹⁶

3.1d Economic Activity

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

Significant economic regeneration projects will continue to reshape the borough with a large supply of brownfield development to help meet its targets for new housing and economic growth. This is concentrated mainly in the 'Arc of Opportunity' stretching from Stratford and the Olympic Park, down the Lower Lea Valley and east through the Royal Docks to Beckton.¹⁷

¹⁴ Greater London Authority (GLA) London Borough Profiles 2017

¹⁵ Greater London Authority Labour Force Survey 2018

¹⁶ Understanding Newham 2017 Newham Household Panel Survey Wave 9

¹⁷ Newham Local Plan 2018

Table 7: Economic Activity - Newham economic activity January 2018 to December 2018¹⁸

	Newham (numbers)	Newham (%)	London (%)	Great Britain (%)
Economically active [†]	182,200	72.9	78.2	78.5
In Employment [†]	172,100	68.7	74.3	75.1
Employees [†]	134,400	54.2	60.6	64.3
Self employed [†]	37,700	14.6	13.3	10.6
Unemployed (model-based) [§]	10,200	5.6	5.0	4.2
# Sample size too small for reliable estimate (see definitions)				
† - numbers are for those aged 16 and over, % are for those aged 16-64				
§ - numbers and % are for those aged 16 and over. % is a proportion of economically active				

In 2018, Newham's employment rate stood at 68.7%. This rate remains lower than both London and Great Britain averages.

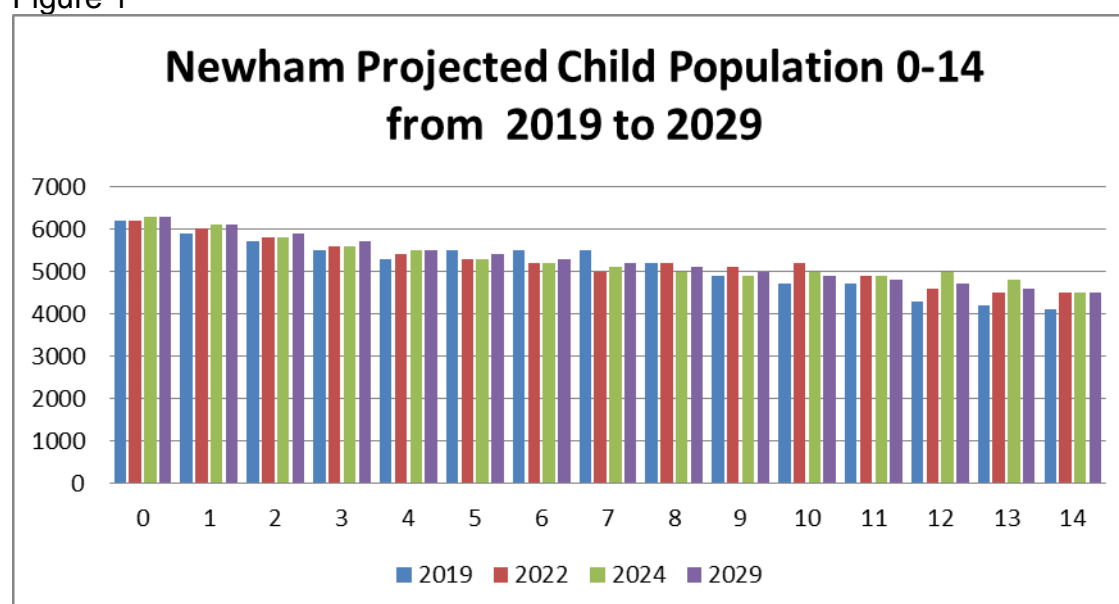
Median earnings for Newham residents

The median full-time weekly income for Newham residents is £598.80; this compares to the London weekly average of £670.80.¹⁹

3.2 Child age profile and geographical distribution

Figure 1 shows the individual year breakdowns by age for Newham over 2019 to 2029. Over the period there remain more children in the younger age ranges but the numbers of children in the older age ranges are increasing at a faster rate than those in the younger age ranges.

Figure 1



¹⁸ Source: Office for National Statistics (ONS) Annual Population Survey. Extracted from NOMIS <https://www.nomisweb.co.uk/reports/lmp/1a/1946157255/report.aspx#tabempunemp>

¹⁹ The Office for National Statistics: 2018 Provisional data Annual Survey of Hours and Earnings.

The borough is made up of 20 wards which are shown in map 2 below. Sufficiency data that follows in this report is supplied at ward level.

Map 2

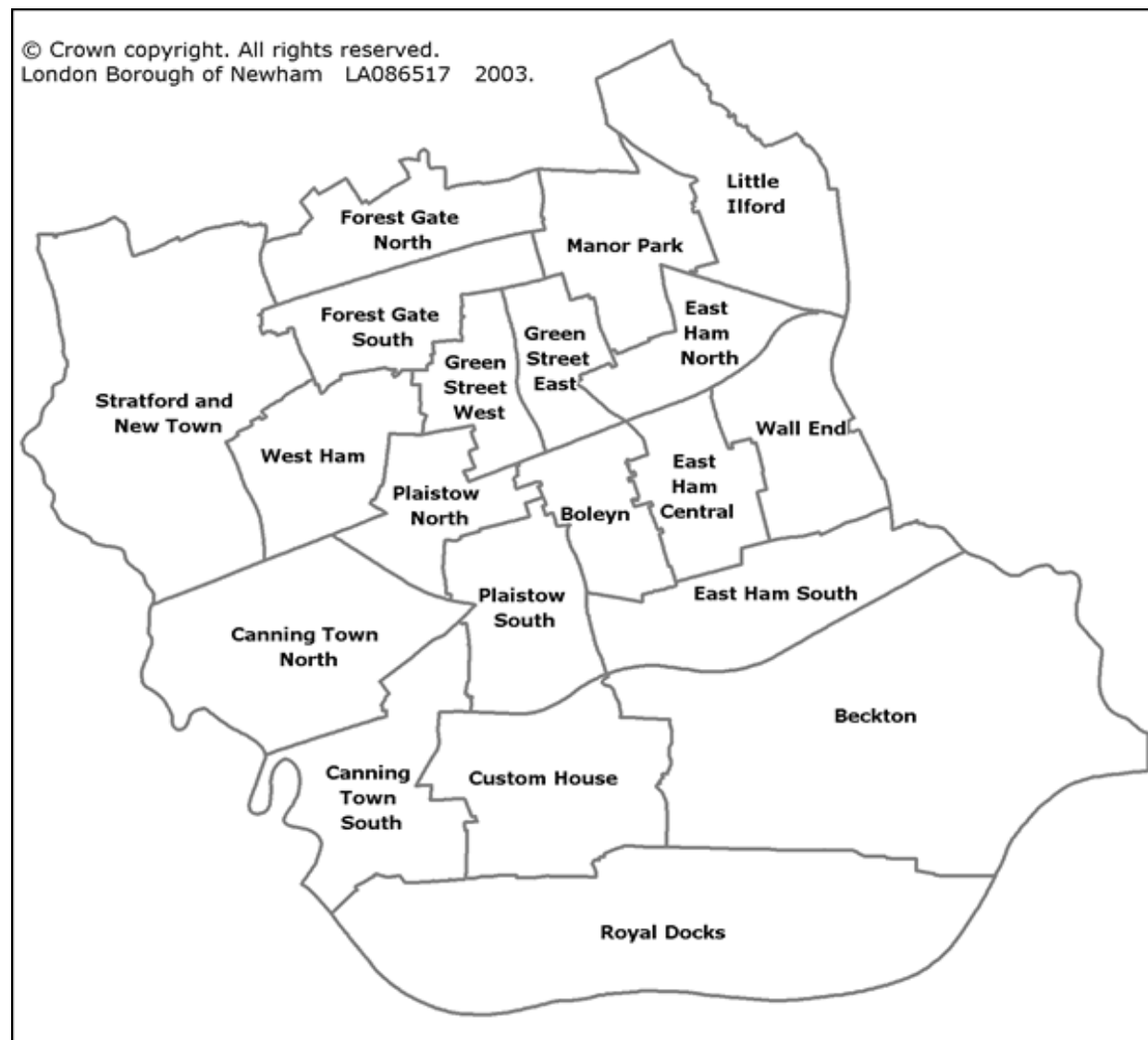
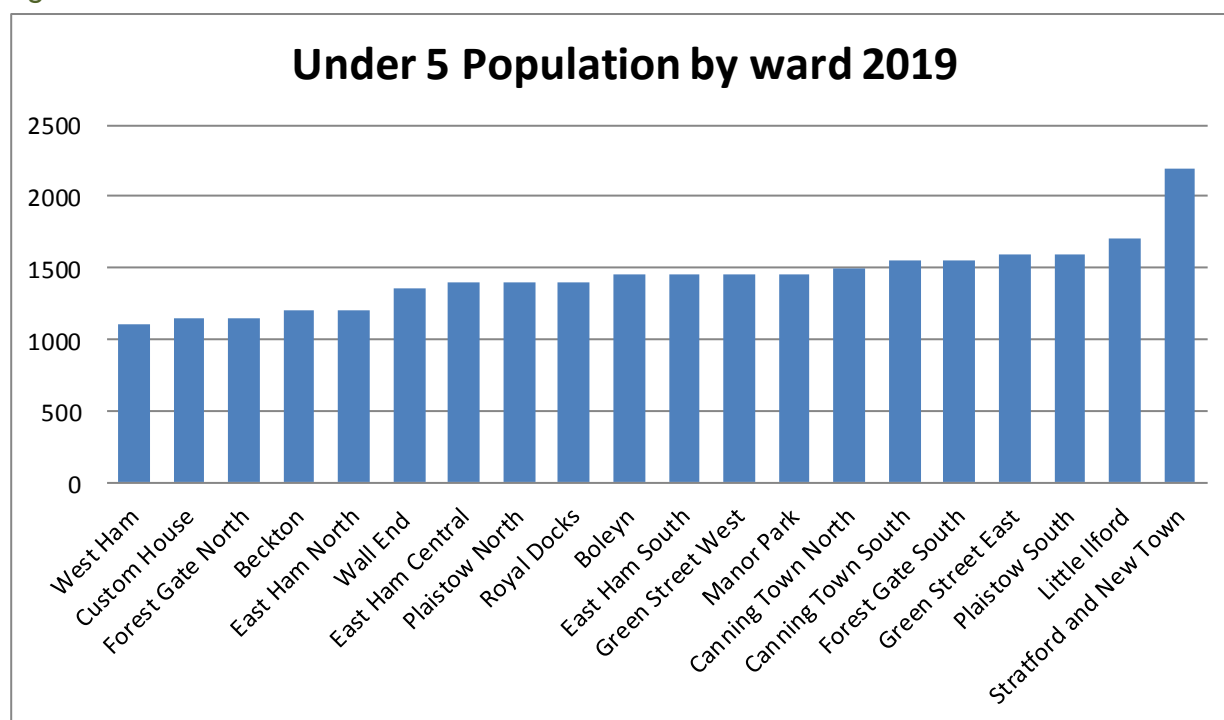


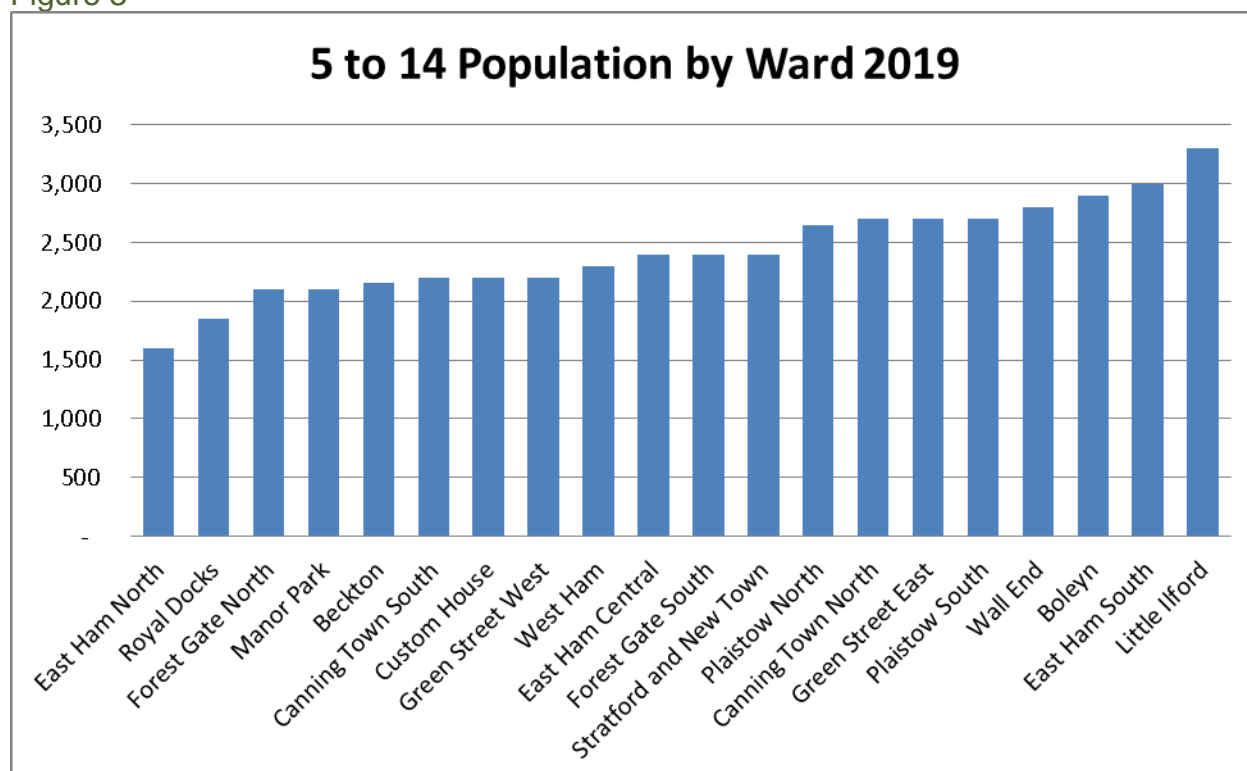
Figure 2



The under-five population per ward is shown at Figure 2.²⁰ The most populated wards are Stratford and New Town, Little Ilford, Plaistow South, Green Street East and Forest Gate South. Stratford and New Town stands out and there are twice as many 0-4 children in this ward as the least populated ward of West Ham. The least populated wards are West Ham, Custom House, Forest Gate North and Beckton. Redevelopment is projected to see increases in 0-4 children Stratford and New Town, Royal Docks and Canning Town South.

²⁰ GLA Population Projections Central Trend (published July 2017)

Figure 3



The 5 to 14 population per ward is shown at Figure 3.²¹ The most populated wards are Little Ilford, East Ham South, Boleyn, Wall End, and Plaistow South. The wards with the lowest numbers are East Ham North, Royal Docks, Forest Gate North and Manor Park. On going regeneration in Stratford and New Town, Royal Docks and Canning Town North, Canning Town South and Beckton will see growth in 5 to 14 population over the next ten years.

3.3 Special Educational Needs or Disabilities (SEND) – 0 to 18 year olds

Estimating the numbers of Newham children with SEND.

Children with SEND are entitled to support with childcare up to the age of 18 . The number of children with an Education, Health and Care (EHC) plan in our local authority, as reported to the Department for Education in January 2019 is shown in table 8 below. There is an increase of 125 children (16%) compared to that reported to the DfE in 2018.

²¹ GLA Population Projections (published July 2017)

Table 8		
Age	Number of children 2019	Number of children 2018 comparison
Under age 5	22	7
Aged 5 to 10	209	144
Aged 11 to 15	285	260
Aged 16 to 19	300	300
Aged 20 to 25	90	69
TOTAL	906	581

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. All children will receive targeted interventions to support their needs and for a few children, the application process for a statutory assessment may need to commence, which may or may not lead to an EHC plan being issued. In 2018/19, 98 high needs places were commissioned via the maintained nursery schools, 60 children were support via the emerging needs funding, and 18 settings received additional funding for children in receipt of DLA. In addition to this, 19 two years olds were provided with discretionary funding due an identified SEND need. Therefore the number of children with SEND aged 0-4 shown in Table 7 is an underestimate.

A proxy for 0-4s with SEND can be obtained by using DfE's Special Education Needs in England dataset.²² This records total pupils with SEND in Newham primary schools as 12.1%. Applying this percentage to the number of 0-4 children in Newham gives an estimated number of 0-4 children with SEND as 3,461.

There are 4,832 children in Newham primary schools recorded with SEND, 2,792 children in secondary schools and 122 in special schools²³. Adding the estimated 0-4 SEN child number of 3,461 to these gives an estimated number of SEND children across early years and school age of 11,207.

3.4 Parent and carer views on the provision of childcare

Information on parents views and access to services has been included from the most recent DfE parent survey. This is supplemented by a survey of Newham parents conducted in Spring 2019, which received 172 parent responses.

3.4a Finding out about Childcare

The Department for Education survey identifies informal social networks, such as friends or relatives and other parents, were significantly more likely to be used as sources of information for parents about childcare than were official sources, such as Families Information Service, local authorities or other national organisations.

²² Department for Education Special Educational Needs in England 2019

²³ Department for Education Special Educational Needs in England 2019

Most frequently used sources of information used were word of mouth (42%), and schools (33%) with a smaller proportion of parents using social media (14%), , Local Authorities (13%), Government websites (9%), local advertising (8%), childcare providers (7%) and NHS (health visitors/clinics (6%))

In Newham parents were asked what methods they used to find out about childcare. The most common methods identified in order were:

- Personal recommendation by friend or family
- Provider previously known to parent
- Internet search
- Advert from childcare provider
- Information or advert from Newham Council

3.4b Awareness of help with Childcare Costs

The DFE Parent survey found that nationally 90% of parents with a child aged 0-4 were aware of the 15 hours universal offer and 83% were aware that certain two year olds are eligible for free hours.

Previous parent surveys carried out in Newham have highlighted that there was low awareness of the range financial help available to help with costs. In Newham's 2019 survey parents were asked about their awareness of specific free and subsidised childcare schemes.

Of the free childcare schemes 76% of Newham responders were aware of the two year old scheme, 72% were aware of the 30 hours scheme for three and four year olds and 71% were aware of the universal 15 hours scheme for three and four year olds.

Awareness was lower with regard to childcare subsidy schemes, with 54.1% being aware of childcare element of tax credits, 48.3% were aware of tax free childcare and 27.3% aware of the care to learn programme.

It should be borne in mind that parents completing the Newham survey were self selecting and parents where English language is not strong would be less likely to have participated in the survey.

3.4c Reasons for choosing childcare

According to a Department for Education national survey in 2018 ²⁴ parents take into account a range of factors when deciding which formal provider to choose for their child as is detailed in Table 9).

²⁴ DFE Childcare and Early Years Survey of Parents 2018

Table 9 Coverage: Reasons for choosing childcare (England)							
Year: 2018							
	Main formal provider						
Reasons	Nursery school	Nursery class	Reception class	Day nursery	Play-group	Child-minder	All
	%	%	%	%	%	%	%
Convenience	54	59	47	71	59	64	60
Provider's reputation	53	53	53	64	68	56	58
Concern with care given	48	46	33	57	48	67	50
Child could mix	50	43	33	61	59	40	50
Child could be educated	39	45	41	42	38	27	39
Trust	30	30	20	39	36	58	35
Older sibling went there	18	32	26	17	23	17	21
Economic factors	27	28	14	27	26	26	25
No other option	5	2	9	2	2	6	4
Child's choice	0	0	0	0	0	0	0
Other (e.g. family ties)	6	8	5	6	4	18	7

The national survey found that provider's convenience and reputation are the strongest factors overall in choosing childcare, followed by the quality of the care given and the opportunity for the child to mix with other children and financial considerations.

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

In Newham, parents were asked to identify and rank the factors they took into account when choosing childcare. The most important factors identified in order are shown below. While the two surveys are not directly comparable, there are similarities with the findings, but the Newham survey scores affordability more strongly than the national study. This may reflect the relatively deprived nature of the borough.

Factors in choosing childcare in Newham in order of importance

- Close to home
- Reputation of provider/Ofsted
- Opening hours

- Affordability
- Provider previously known to parent
- Close to school

3.4c Use of childcare

Nationally the proportion of families using formal childcare fell from 66% in 2017 to 62% in 2018, bringing it in line with the proportion of families using formal childcare in earlier waves of the survey (63% in both 2010-11 and 2011-12, and 64% in 2012-13). This fall was largely attributable to a lower take-up of after-school clubs (a fall from 38% in 2017 to 32% in 2018), day nurseries (a fall from 10% to 9%), and playgroups (a fall from 5% to 3%).

The use of formal childcare among families with only pre-school children remained stable between 2017 and 2018 (71% in both years), but fell among families with both pre-school and school-age children (from 84% to 79%), and among families with school-age children only (from 59% to 53%).

In the Newham survey²⁵, of the 172 responding parents, just over half had used childcare in the last 12 months (54%). Informal childcare is an important part of the mix for surveyed parents with a significant portion of parents identifying friends, family or baby sitters as one of the childcare options they use (17%).

In Newham the majority of families surveyed said that they use childcare in order to work (83%), for many parents allowing children to benefit from free early education was identified (45%), while others recorded that they use childcare for their child's learning and development (34%) or social skills (24%).

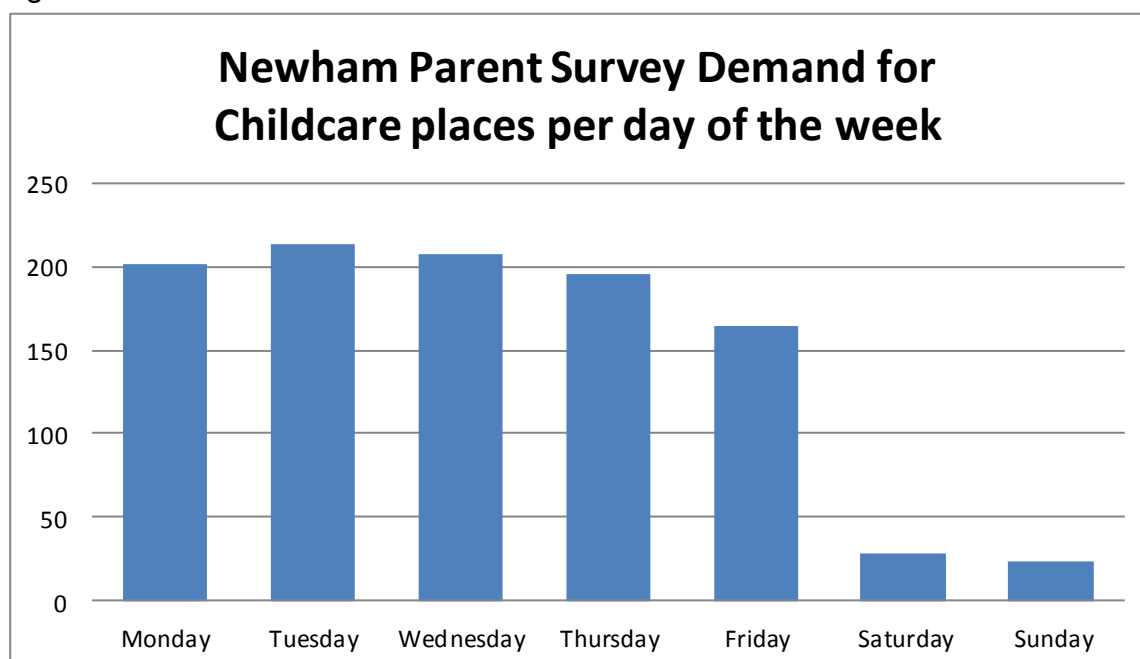
Newham parents were asked if they were able to access early years registered good or outstanding childcare. The vast majority of responding parents indicated that they had been able to access good or outstanding provision (92%). A lower proportion of parents recorded that they had been able to access Ofsted registered out of school care services (81%).

Over three quarters of responding parents said that they were able to access the hours that fully met their needs from their childcare provider (78%). While over 4 in 5 of responding parents said that they had been able to receive childcare services from their preferred provider (81%). With regard to affordability a majority of parents said they had been able to access childcare priced within their budget (60%), leaving a significant minority where affordability was an issue.

Newham parents were asked about their need for childcare places across an average week. Figure 4 shows that highest demand is for places at the beginning of the week and that there is some demand for places at the weekend.

²⁵ Newham on line parent survey 2019

Figure 4



3.4d Factors influencing the take up of formal childcare

The DfE national parent survey 2018 found the following characteristics associated with children in receipt of formal childcare:

The child's age: children aged 3 to 4 were most likely to receive formal childcare (88%) while children aged 12 to 14 were least likely to (28%)

The deprivation level of the local area: 62% of children living in the least deprived areas received formal childcare, compared to 44% of children living in the most deprived areas

The family's annual income: 63% of children in families earning £45,000 or more received formal childcare, compared to 47% of those earning under £10,000;

The family structure and work status: children in dual-working couple families (60%), and in working lone-parent families (49%), were most likely to receive formal childcare. Children in couple families with neither parent in work (37%), and in non-working lone-parent families (42%) were least likely to receive formal childcare.

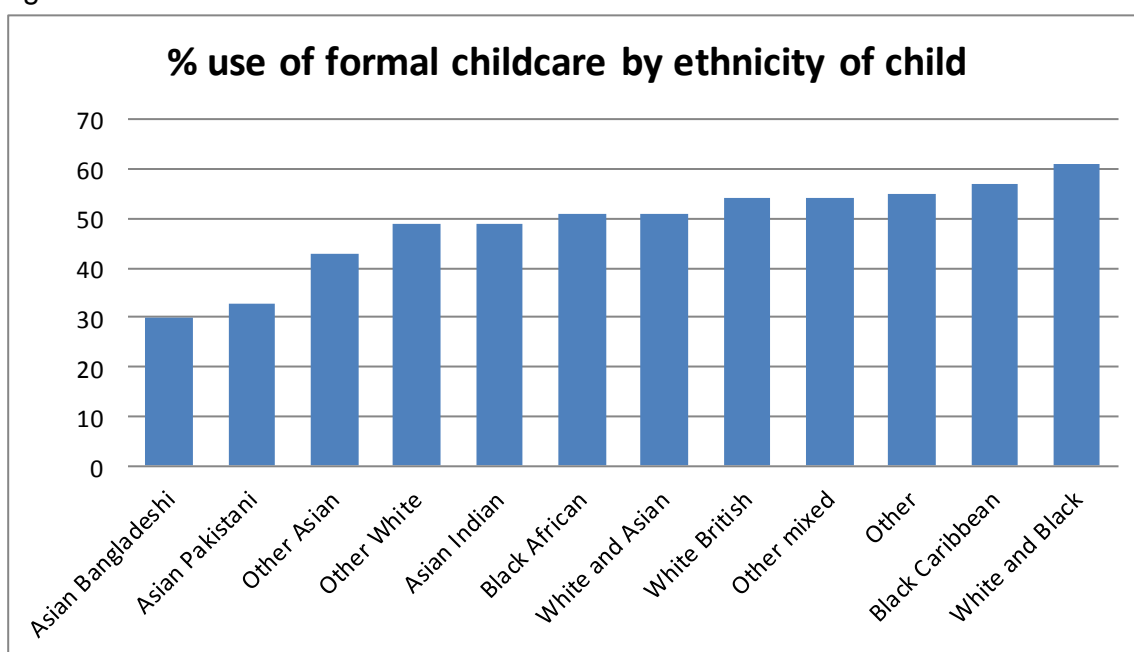
A study of the take up of free early education entitlements²⁶ identifies ethnicity and language as a contributing factors driving take up levels. "Take-up was found to be lower among children from Bangladeshi, Gypsy/Roma/Traveller, Black African and Pakistani backgrounds in a study of take up among 3 year olds in 2010 (Campbell et al, 2018). Children who speak English as an additional language were found to be nearly three times as likely not to take up their full five terms of eligible preschool compared to children with English as their first language, in a study of 3 year olds (Campbell et al, 2018)." These are important considerations in Newham where 45.5% of the population

²⁶ Take up of free early education entitlements Research Report Department for Education 2018

is Asian and the percentage of adults who speak English at home is 63% in 2018²⁷. The most common stated first languages in Newham are English (41%), Bengali (13%), Urdu (6%), Gujarati (5%), Punjabi (3%), Hindi (2%), Portuguese (2%), Somali (2%) and Polish (2%).²⁸

There are also differences in the take-up of all formal childcare according to ethnic background with highest rates among mixed White and Black, Black Caribbean and White British children, and lowest among children from Bangladeshi, Pakistani and 'other Asian' backgrounds, identified by the national Childcare and Early Years Survey of Parents 2018 and illustrated in Figure 5.

Figure 5



Nationally children with special educational needs are less likely than those without to receive formal childcare (45% compared to 52%)²⁹. In a national study³⁰ parents of children with SEND wanted to send their child to a provider that catered to their child's needs and identified reasons for not taking up the free entitlement as lack of awareness, inability to set up an EHC plan in time and having workplace childcare options instead. The same study summarises that lower take up of the free entitlements at local authority level is associated in particular with English as an additional language, population mobility and higher SEND levels.

²⁷ Office for National Statistics First Language spoken at home 2018

²⁸ Understanding Newham 2017 Newham Household Panel Survey Wave 9

²⁹ DFE Childcare and Early Years Survey of Parents 2018

³⁰ DFE Take up of free early education entitlements 2018

4 Supply of services for under-fives

4.1 Types of registered provision

- Day nurseries provide full or part-time day care for children aged from birth to 5 years, although not all day nurseries are registered to care for children aged under 2 years. Most are open from at least 8am - 6pm weekdays and commonly operate between 48 and 51 weeks a year.³¹ Where maintained nursery schools or schools operate a full daycare service these have been included.
- Pre-schools offer day care (under 4 hours) for children aged between 2 and 5 years during school term. Some groups may also offer linked morning and afternoon sessions or places during school holidays.
- Out of School provision can include breakfast, after school and holiday care. Many offer a school pick up and collection service from local schools, nurseries and pre schools.
- Childminders are registered to look after children in the childminders own home. Childminders are often flexible about the hours they work. Many offer a school pick up and collection service from local schools, nurseries and pre-schools.
- Where the term group care is used in this report it describes the combination of day nursery, pre-schools and out of school provision. Where the term full time equivalent is used in this report it is used to represent a place offered over fifty hours in a week.

³¹ Newham Childcare Provider Survey 2019

4.2 Overall number of places available for under-fives

Table 10 Number of registered places available for under-fives					
Type of Registered Provider	Newham places 2015	Newham Places 2016	Newham Places 2018	Newham Places 2019	% Change since 2018
Day care and Out of School	3383	3773	3661	3577	0.9
			281	364	
Pre School	451	438	352	322	-8.5
Childminder / childcare on domestic premises	507	621	560	622	11.1
Total	4341	4832	4854	4885	0.6

The total registered places available for under-fives in autumn 2019 stands at 4,885 as shown in Table 10. This is a virtual stand still position against the number reported last year, with 31 more places being available overall. Underneath the headline figure there continues to be a reduction in pre school provider places, which is counteracted by increases in childminder and out of school places that are now available.

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

In addition to the above, most primary schools and all nursery schools in Newham offer part time funded early education places for children aged three and four and in some cases at age two. Places available in these settings across Newham are shown in Table 11.

Table 11 Funded Places in Schools and Nursery Schools 2019		
Type of Provider	Number of providers	Number of places
Nursery units in primary schools	59	4196
Maintained nursery schools	7	1290
Total	66	5,486

Overall places across all providers, including both full time and part time, now total 10,731.

4.3 Number of places available in each ward for under-fives

4.3a Figure 6. Group Care places available in each ward

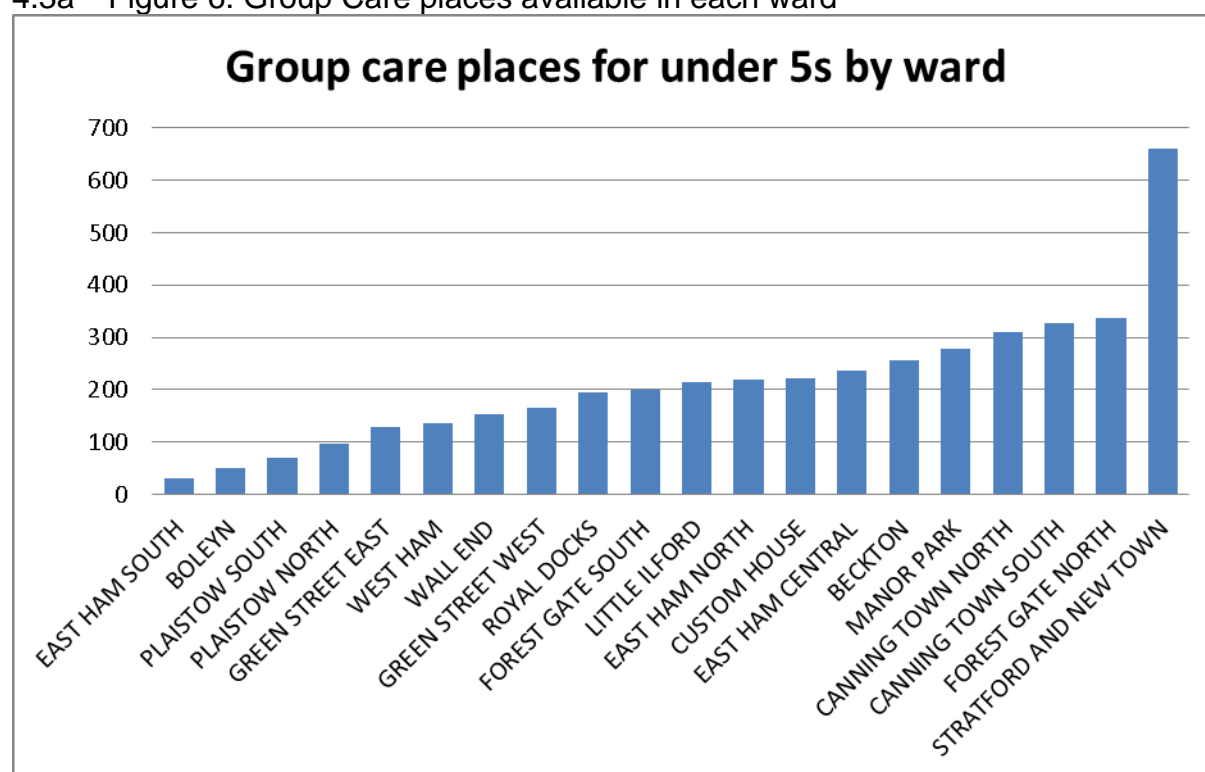


Figure 6 illustrates the distribution of group care places in the borough.³² It shows that the lowest number of places are in the wards of East Ham South (32), Boleyn (50) Plaistow South (70) and Plaistow North (97). Stratford and New Town has nearly twice as many places as any other ward (659). The average number of group care places per ward is 213.

³² Newham child view data Autumn 2017

4.3b Figure 7 Childminder places available in each ward

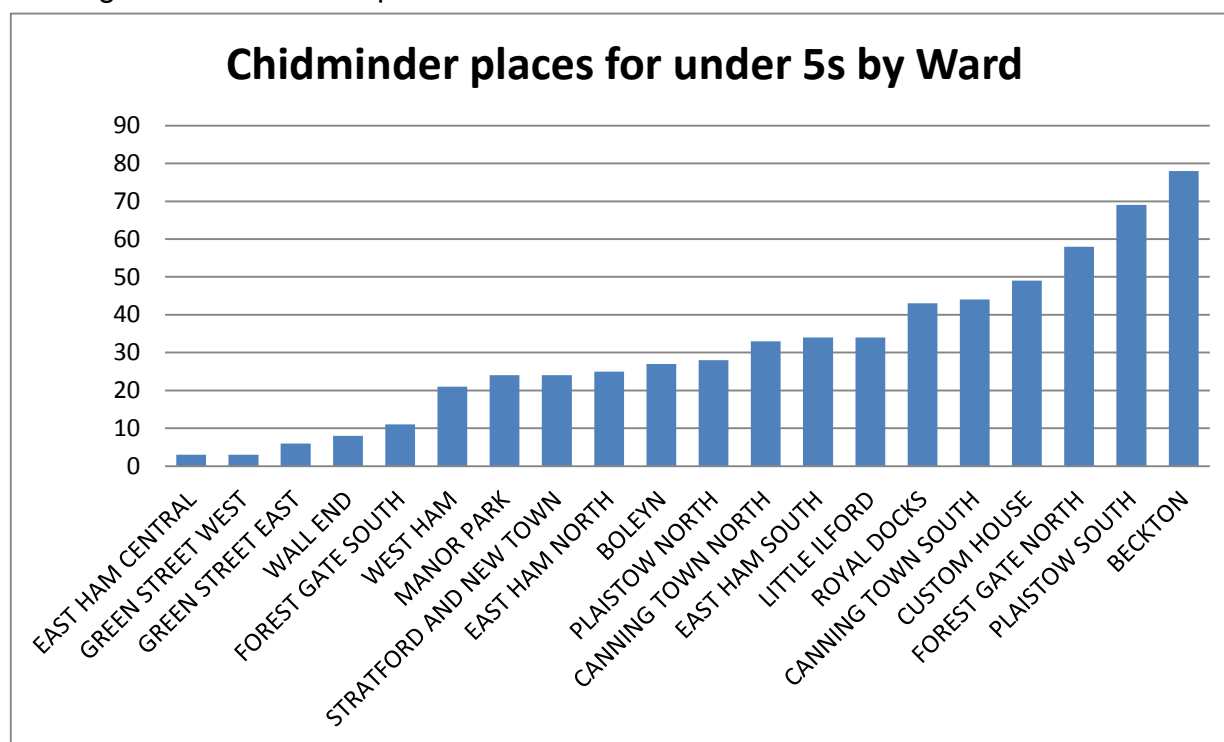


Figure 7 shows the distribution of childminder places.³³ There are 15 or less places available in East Ham Central (3), Green Street West (3), Green Street East (6), Wall End (8) and Forest Gate South (11). Beckton has more places than any other ward at 78, significantly more than the ward average of 31.

³³ Newham Child view Data Summer 2019

4.3c Figure 8 Combined places by ward.

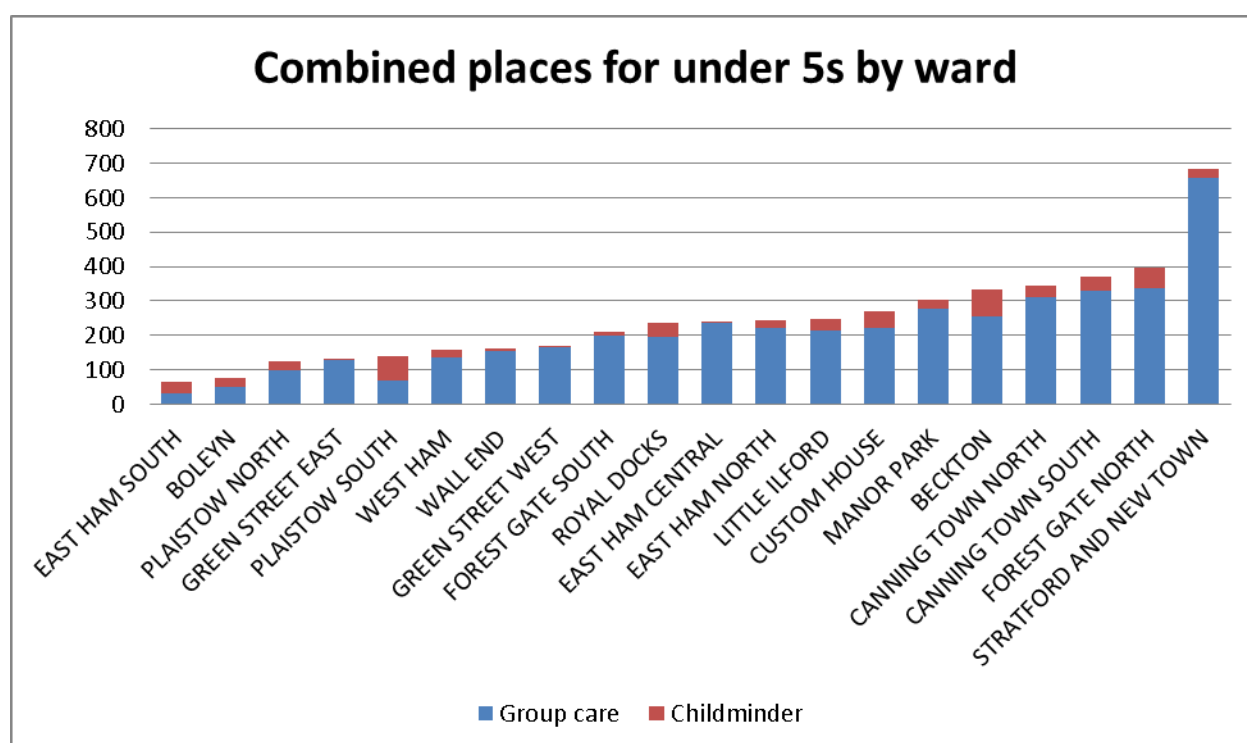


Figure 8 illustrates the overall distribution of under-five places across the borough. The wards with under 150 places are East Ham South (66), Boleyn (77), Plaistow North (125), Green Street East (139). Stratford and New Town has the highest number of places (683), compared to the ward average of 245.

4.4 Number of places available per child in each ward

4.4a Figure 9 Overall place availability per child in each ward

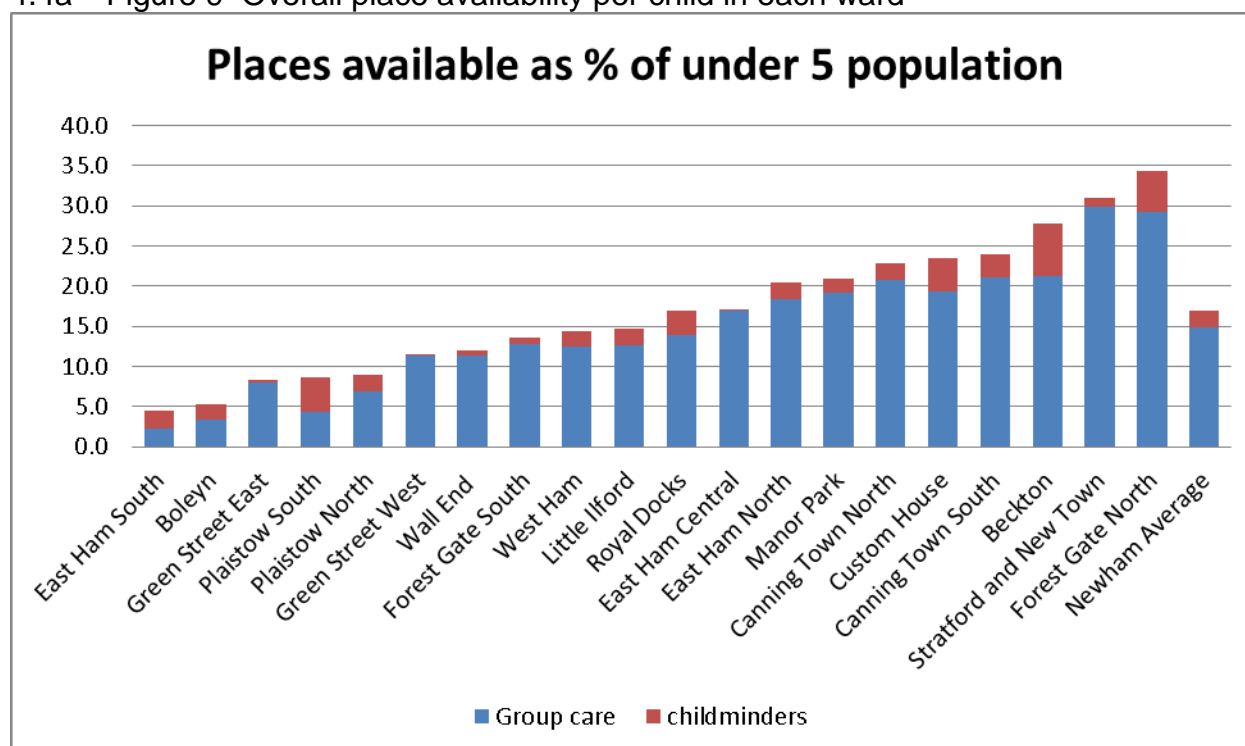


Figure 9 shows the number of all places as a % of the resident under-five population in each ward.³⁴ The ward distribution of all places shown above translates to an average of 1 place for every 6 children in the age range across the borough (unchanged from 2018), more precisely in 2019 this equates to 17% of under-five population overall.

There continues to be a wide variation in the number of places available per resident under-five in each ward, as illustrated in Table 12. However Boleyn ward, which has for a long time been an outlier, and only had 1 place for every 83 resident children in the CSA 2018, has significantly improved and is no longer the ward with the least places per resident under 5 child. The wards with the least places per resident child are now (in order) East Ham South, Boleyn, Green Street East, Plaistow South and Plaistow North.

The wards with the most places per resident child have 1 place for every 4 resident children and include Stratford and New Town (despite child population growth), Canning Town South, Forest Gate North and Beckton.

³⁴ GLA Population Projections (published July 2017) and Newham Child view data summer 2019

Table 12 Under 5s Full Time Places

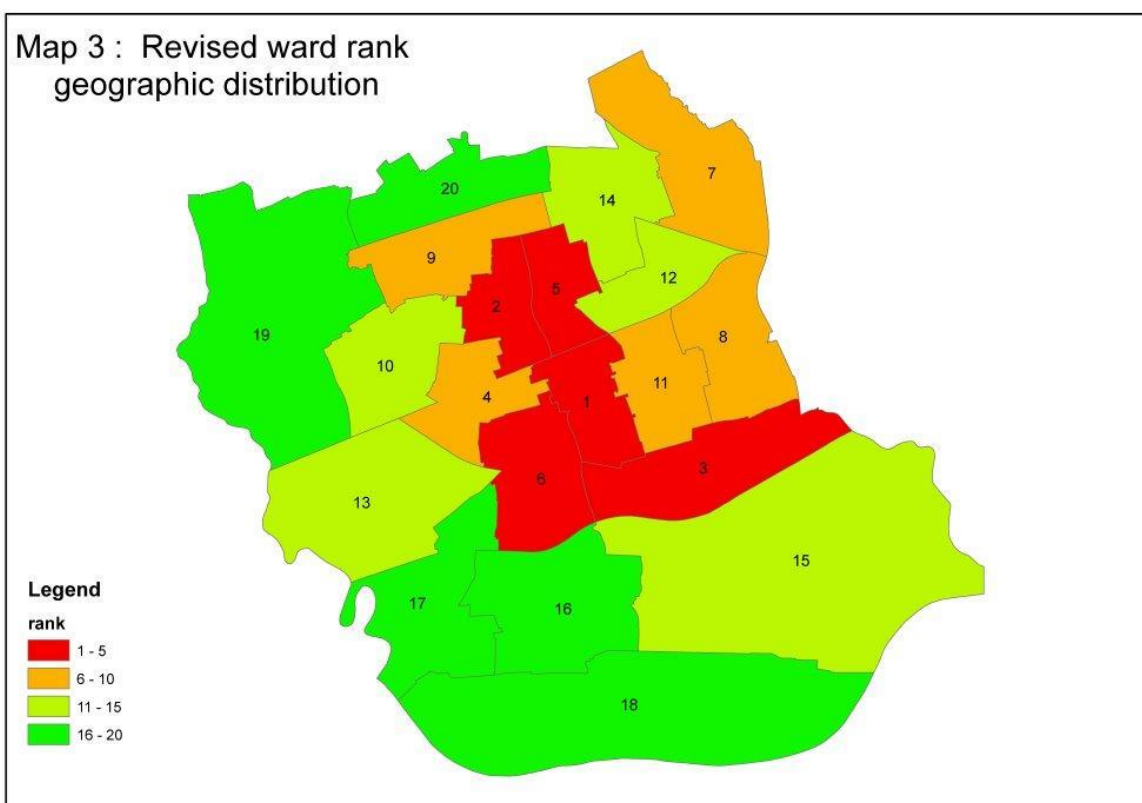
Wards are ranked by total registered places per resident child in each ward		
1	East Ham South	1 full time place for every 22 resident children
2	Boleyn	1 full time place for every 19 resident children
3	Green Street East	1 full time place for every 12 resident children
4	Plaistow South	1 full time place for every 12 resident children
5	Plaistow North	1 full time place for every 12 resident children
6	Green Street West	1 full time place for every 9 resident children
7	Wall End	1 full time place for every 9 resident children
8	Forest Gate South	1 full time place for every 8 resident children
9	West Ham	1 full time place for every 7 resident children
10	Little Ilford	1 full time place for every 7 resident children
11	Royal Docks	1 full time place for every 6 resident children
12	East Ham Central	1 full time place for every 6 resident children
13	East Ham North	1 full time place for every 5 resident children
14	Manor Park	1 full time place for every 5 resident children
15	Canning Town North	1 full time place for every 5 resident children
16	Custom House	1 full time place for every 5 resident children
17	Canning Town South	1 full time place for every 5 resident children
18	Beckton	1 full time place for every 4 resident children
19	Stratford and New Town	1 full time place for every 4 resident children
20	Forest Gate North	1 full time place for every 3 resident children
	Newham Average	1 full time place for every 6 resident children

Some wards with lower places per child resident are next to others that have high numbers which can then serve their population needs. For example Royal Docks (ranked 11 above) has boundaries with other better served wards of Beckton (ranked 18), Canning Town South (ranked 17), and Custom House (ranked 16). On the other hand Green Street West (ranked 6 above) has boundaries with lower ranked wards of Boleyn (2), Green Street East (3), Plaistow North (5), Forest Gate South (8) and West Ham (9).

A weighted analysis which reflects equally both the places per resident population in a ward and those of other wards with an adjoining boundary produces a slightly different ward ranking, with the majority of those wards with least provision per child clustered in the centre of the borough. The biggest movers using this analysis are Royal Docks (improving from a rank of 11 to 18), Green Street West (deteriorating from a rank of 6 to 3), East Ham Central (deteriorating from a rank of 12 to 9) and Beckton (deteriorating from a rank of 18 to 15) This revised ranking is set out in Table 13 with the geographical distribution shown in Map 3.

It should be noted that as a result of Stratford being a major transport hub and employment centre it is likely that this increases the demand for places in the ward from parents not living in or close to the locality.

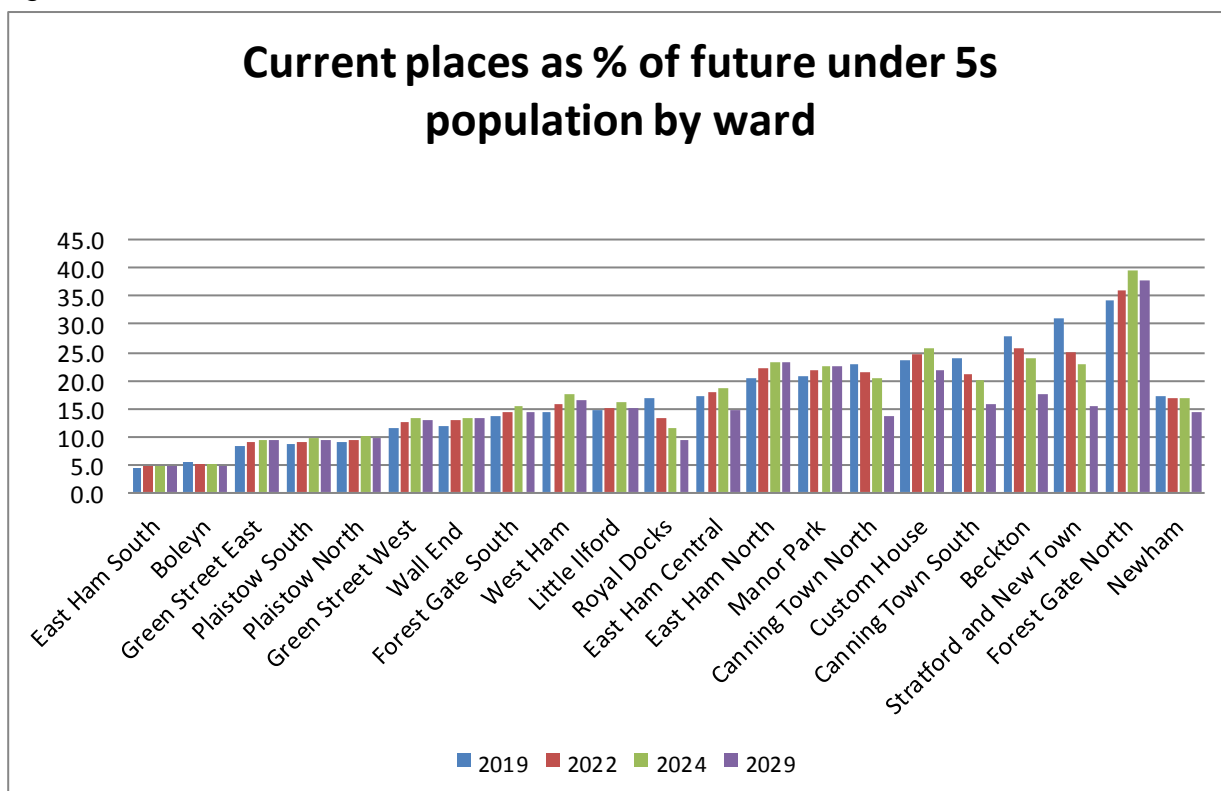
Table 13 Under 5s Adjusted Ward Rank	
Wards are ranked to reflect places per child in resident ward and in adjoining wards	
1	Boleyn
2	East Ham South
3	Green Street West
4	Green Street East
5	Plaistow South
6	Plaistow North
7	Wall End
8	Forest Gate South
9	East Ham Central
10	Little Ilford
11	West Ham
12	East Ham North
13	Manor Park
14	Canning Town North
15	Beckton
16	Custom House
17	Canning Town South
18	Royal Docks
19	Stratford & New Town
20	Forest Gate North



4.5 Future Projections

Figure 10 shows the impact of predicted population changes on future sufficiency for Under-fives at ward level, assuming existing numbers of places available stays the same.

Figure 10



Overall Newham's under-fives population is predicted to remain relatively stable in the short term but then increase by 17.3% by 2029. Using ward level population projections the wards with the least places per resident child in 2029 will be Boleyn, East Ham South, Green Street East, Plaistow North and Plaistow South. The biggest change in place availability relate to Stratford and New Town which reduces the places available per resident child from the current 31% to 15% by 2029, Beckton which reduces from the current 28% to 17% and Royal Docks which reduces from the current 23% to 14%.

4.6 Occupancy levels in Newham

4.6a Group care place occupancy

Of the 46 Newham group care settings that provided information on occupancy, half (23) reported occupancy of 70% or more, while eight reported occupancy of under 30%. The average occupancy was 61%³⁵, this is marginally improved from the 59% reported in last CSA of 2018.³⁶

4.6b Childminder place occupancy

Of the 39 Newham childminders that provided information on occupancy, just under half (19) reported occupancy of under 30%, while twelve reported occupancy of 70% or more. The average occupancy was 45% and is a decline of 10% against that shown in

³⁵ Newham Childcare Provider Survey 2019

³⁶ Newham Childcare Provider Survey 2018

the CSA 2018.³⁷ The survey showed a polarisation of occupancy with majority of childminders being either close to full or empty.

Occupancy is a key driver in supporting sustainability. A CEEDA study³⁸ on the cost of childcare in Newham identifies that occupancy is a major factor driving unit costs, as occupancy increases fixed costs such as rent, rates, utilities and management time are spread across more children, thus lowering the cost per hour delivered.

4.7 Supply of services to children with Special Educational Needs or disabilities (SEND)

Provision for SEND children is provided by mainstream childcare settings and through a number of specialist services provided by both maintained and voluntary organisations. The authority is continuing its work to support providers of care so that the rising number of children with SEND can access childcare and education support in a range of private, maintained and voluntary organisations.

The Best Start in Life SEND Hub was established in September 2015 and 2 Local Authority Area SENCOs were appointed. The team now includes a practice support practitioner and children centre development officer, who provide practical support and guidance across PVI, CM and children centres. The hub operates from Ronald Openshaw Education Centre (RONEC) in Stratford but function across the whole borough. The agreed aims of the hub are:

- ✓ to support PVIs / Childminders to develop their skills in working with children with SEND
- ✓ to enable children with SEND to attend their local setting / childminder
- ✓ Support staff at PVIs through training and a peer coaching approach
- ✓ SEND support for children centre teams, including family support workers.

The SEND code of Practice (DfE, 2015:89) requires the LA to support early years providers and childminders in the borough to identify, plan and support provision and practice for children with SEND or potential SEND, so that they may reach their potential.

In 2018 Newham established a Special Educational Needs Inclusion Fund which is able to allocate funding to settings for children with emerging needs or have an assessed placement within a maintained nursery setting.

The Newham Local Offer has been recommissioned so that it can better provide information on a range of services and support for children and young people with special educational needs and/or disabilities (SEND) which includes:

- Schools and colleges (special, specialist mainstream in resourced provision and mainstream)
- Childcare and education for the early years (ages 0 – 5)
- Transport to and from education settings

³⁷ Newham Childcare Provide Survey 2018

³⁸ Ceeda Counting the cost of childcare delivery in Newham 2017

- Health services and support
- Support for families
- Preparing for adulthood (including housing, training and apprenticeships)
- Things to do and places to go
- Information and advice

With Newham short breaks can be funded as part of an agreed plan following an assessment of needs. These enable a disabled child or young person to enjoy positive activities away from home and helps prepare them for adult life whilst providing families and carers with a break from their caring responsibilities.

The Local Authority also works with several organisations to provide group activities for disabled children and young people who cannot go to local groups because of their support needs. Details will be added to the Local Offer pages on the Newham website and Newham has a Framework of Providers in place.

4.8 Quality of early education and childcare in Newham

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 standalone 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.

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

Both schools and early years providers have four possible Ofsted grades: 'outstanding', 'good', 'requires improvement', and 'inadequate'.³⁹ Some providers are still awaiting their first full inspection. These providers are excluded from our calculation, but receive full support from our advisory team in order to ensure they meet Ofsted requirements.

Ofsted is the sole arbiter of quality, and has inspected all settings according to the Common Inspection Framework prior to September 2019. Changes to the inspection framework to the 'Education Inspection Framework (EIF)', commence in September 2019. The new inspection cycle begins at this time, and all settings should be inspected within a three year cycle.

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

Newham is committed to ensuring the highest possible quality of early education and childcare. There is evidence that high quality provision has a significant and sustained positive affect on outcomes for children. To this end, strategies are in place to support new settings, and those inspected as 'Requires Improvement', or 'Inadequate', to

³⁹ For more information see <https://reports.ofsted.gov.uk/about-our-inspection-reports>

support them to achieve a Good or Outstanding Ofsted outcome. We also continue to provide universal support to all settings to ensure we continue to raise our Ofsted profile in line with National average.

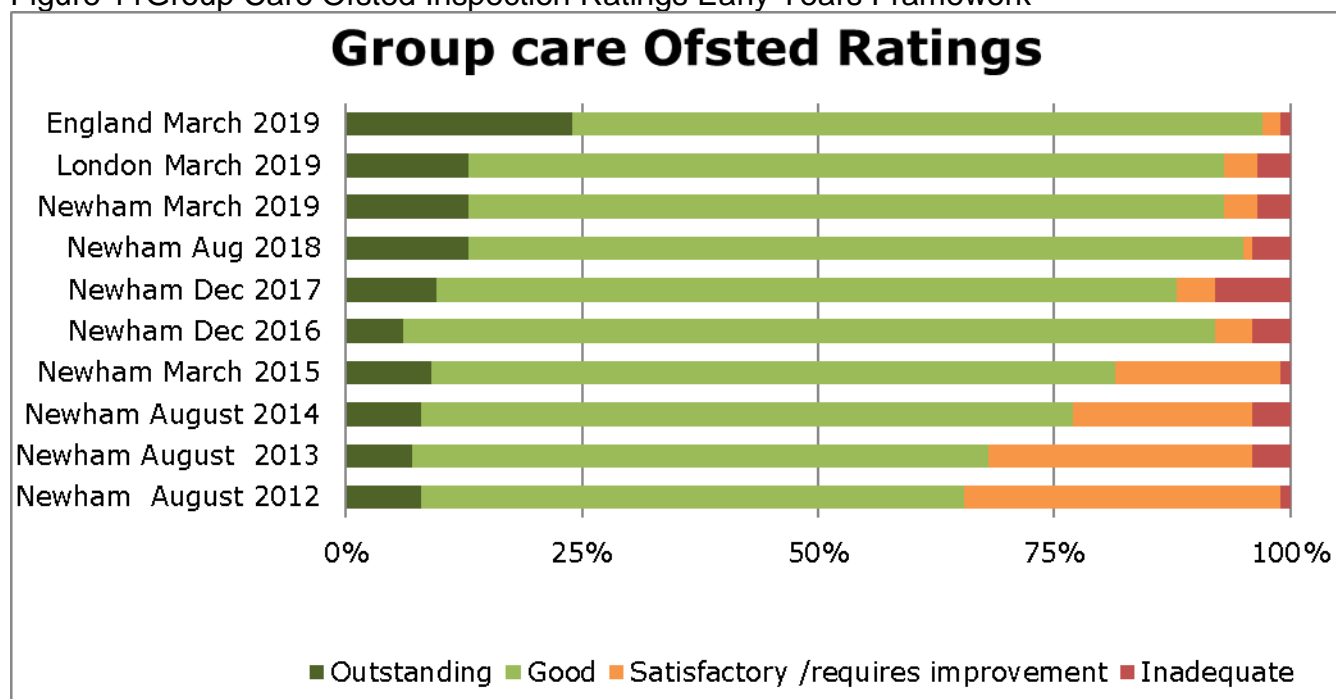
A summary of the good progress that has been made in Newham over the last year is shown in Table 14⁴⁰.

Table 14

Type of Provision	Number of inspected Providers	% Achieving good or outstanding Mar 19	CSA 2018 comparison
Childminders	128	82.8%	80.0%
Childcare on domestic premises	3	100.0%	
Private Voluntary and Independent	79	92.4%	87.0%
Maintained Nursery Schools	7	100.0%	100.0%
Schools and Academies*	66	92.4%	90.0%

⁴⁰ Data source Ofsted Data view March 2019. early years grade if available, otherwise overall school grade.

Figure 11 Group Care Ofsted Inspection Ratings Early Years Framework

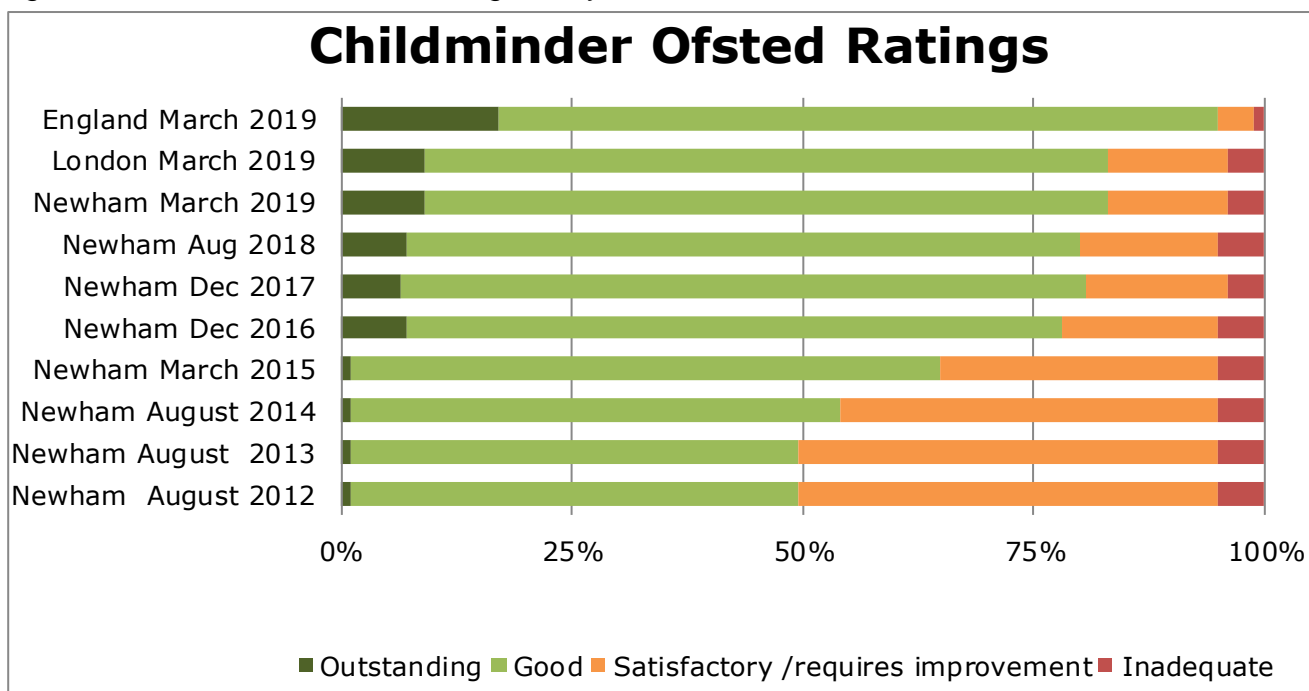


4.8a Group Care Ofsted Ratings.

Figure 11 above shows the percentage of providers in each of the Ofsted Inspection category ratings. Within Newham the scores achieved have significantly improved over time. In 2019 the percentage of outstanding providers was 13% and the combined percentage of good and outstanding providers was 93%. This matches the overall ratings of London as a whole but remains below the ratings for England, where 97% of providers are good or outstanding.⁴¹ Newham remains committed to improving Ofsted outcomes for all providers through a comprehensive professional development programme, as well as supporting joint practice development, in order to improve the resilience and skill of practitioners.

⁴¹ Ofsted Data view data update as at Mar 2019

Figure 12 Childminder Ofsted ratings Early Years Framework



4.8b Childminder Ofsted Ratings.

Figure 12 shows the percentage of childminders in each of the Ofsted Inspection category ratings. Within Newham the scores achieved have improved significantly over time, and further progress has been made this year. Providers achieving good or outstanding have increased from 50% in 2012 to 84% by March 2019.

Newham's childminder ratings have now caught up with the London average but remain below the England average where 95% of childminders are good or outstanding. The upward trend is a reflection of the commitment from the Best Start in Life (BSiL) team and Early Education Practitioners to support the development of practice through a full professional development programme and weekly Childminder Neighbourhood network meetings based in the Children's Centres.

4.9 Cost of early years childcare

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

4.9a Charges Day Nursery settings.

Table 15 Average Day Nursery Full Fee paying Full Time 50 hours per week						
Age range	Newham Weekly Average CSA 2018	Newham weekly average 2019	Newham per hour (full time) 2019	England weekly average 2019	Inner London weekly average 2019	Outer London Weekly average 2019
0-2	£234	£235	£4.70	£246	£330	£278
2-3 no funded hours	£220	£234	£4.68	£240	£313	£273
3-5 no funded hours	£207	£223	£4.46			

The charges shown in Table 15 are for full time places, excluding any reductions for accessing funded hours. Full time prices in Newham have increased overall by 4.7% across the 0-5 age range since 2018, based on 52 survey returns⁴². This is above the inflation rate over the same period. The Family and Childcare Trust national childcare survey 2019 also found that prices for charged hours increased at above the inflation rate. Possible reasons as changes to pensions and minimum wage, the cost of delivering 30 hours extended entitlement, impact of tax free childcare and general inflationary expenses.

Some providers in Newham and across the country have now introduced charges for lunch and activities. Providers cite funding gaps as a reason for introducing charging policies on food and activities.⁴³

Most providers also offer part time places and commonly charge a higher hourly rate.

⁴² Newham Provider Survey 2019

⁴³ CEEDA Early Years Snapshot 2017

Table 16 Average Day Nursery Full Time 50 Hours per week with fees reduced to reflect funded hours						
Age range	Newham Weekly Average CSA 2018	Newham weekly average 2019	Newham per charged hour (full time place) 2019	England weekly average 2019	Inner London weekly average 2019	Outer London Weekly average 2019
2-3 Full time place 35 charged hours and 15 funded hours		£153	£4.37			
3-5 Full time place 35 charged hours and 15 funded hours		£171	£4.89			
3-5 Full time place 20 charged hours and 30 funded hours		£98	£3.27	£96	£124	£113

Table 16 shows average charges for Day Nursery settings taking into account reductions as a result of accessing funded entitlements for 2,3 and 4 year olds.

4.9b Average Childminder Prices.

Table 17 Average Childminder Full Fee paying Time 50 hours per week						
Age range	Newham Weekly Average CSA 2018	Newham weekly average 2019	Newham per hour (full time) 2019	England weekly average 2019	Inner London weekly average	Outer London Weekly average 2019
0-2	£247	£264	£5.28	£223	£303	£300
2-3 no funded hours	£229	£267	£5.34			
3-5 no funded hours	£239	£261	£5.22			

Table 17 shows that full time childminder prices in Newham have increased overall by an average of 10.9% since 2018. It should be noted however that good and outstanding providers were proportionately overrepresented in the 52 survey returns. If it is assumed that Ofsted rated good and outstanding providers can command a higher fee then it may be that the average Newham fee may be overstated. Average childminder fees from the survey are higher than the equivalent day nursery fees in Newham. Newham childminder prices are above the national average but below the averages for both inner and outer London. Most childminders also offer part time places and commonly charge a higher hourly rate.

Table 18 Average Childminder Fee Paying Full Time 50 Hours per week with fees reduced to reflect funded hours

Age range	Newham Weekly Average CSA 2018	Newham weekly average 2019	Newham per charged hour (full time) 2019	England weekly average 2019	Inner London weekly average	Outer London Weekly average 2019
2-3 Full time place 35 charged hours and 15 funded hours		£186	£6.20	£221	£299	£270
3-5 Full time place 35 charged hours and 15 funded hours		£208	£6.93			
3-5 Full time place 20 charged hours and 30 funded hours		£143	£7.15	£96	£124	£113

Table 18 shows average charges for childminders taking into account reductions as a result of accessing funded entitlements for 2,3 and 4 year olds.

4.10 Hours of operation

4.10a Day nurseries

For Day Nurseries in Newham the most common number of hours offered each day is ten hours. The most common start and end times are 8am – 6pm. Longer hours are however becoming more common. The earliest start time is 7am and over a quarter of providers (26.4%) start earlier than 8am. The latest end time is 7pm and over a fifth of providers (22.1%) have a later end time than 6pm. All operate Monday to Friday.⁴⁴

4.10b Childminders

Overall childminders have a greater capacity to accommodate out of hours or changeable childcare needs. The most common start time in Newham is 7am and over half (53%) of childminders have a start time of before 8am. The earliest start time is 6am. The most common end time is 6pm, but nearly a third (30%) offer later end times and the latest end time is 9.30pm. Eighteen childminders recorded that they offer a weekend service.⁴⁵

4.11 Free Early Education sufficiency

Some children are entitled to free childcare, funded by the government.

- All children aged 3 and 4 are entitled to 15 hours per (if accessed in term time only) until they start reception class in school

⁴⁴ Newham Child view Summer 2019

⁴⁵ Newham Child view Summer 2019

- 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 (if accessed in term time only) until they start reception class in school⁴⁶
- Children aged 2 whose families receive certain benefits (including low income families in receipt of in-work benefits), or those who meet additional non-economic criteria, are entitled to 15 hours per week. 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.

Take up of funded early education overview

The proportion of eligible children taking up funded 2 and universal 3 and 4 year old early education in Newham according to DfE January census is shown in Table 19, together with comparisons against previous years and London and England for 2019.

There is a 2% increase in the percentage of two year olds (52%) taking up free early education in Newham in 2019, using this measure. The take up rate is lower than London (56%) and significantly lower than England (68%).

With regard to the universal offer, the percentage taking up the offer in Newham has remained static (82%). This is marginally better than Inner London (81%), but below London (84%) and significantly below England (94%).

The number of children accessing the extended 30 hour offer in Newham increased by 229 (25%), between January 2018 and January 2019.

Table 19

% of eligible children taking a funded place (DfE January Census)	Newham Jan 17	Newham Jan 18	Newham Jan 19	Inner London Jan 19	London Jan 19	England Jan 19
Age 2	43%	50%	52%	56%	56%	68%
Age 3 and 4 (universal 15 hours)	82%	82%	82%	81%	84%	94%
Age 3 and 4 Number of children receiving extended "30 hours"		900	1129			

The DfE commissioned a research report looking at the take up of free early education in 2018.⁴⁷ This provides new evidence about the reasons for the lower take up rates in London and the decline in the universal 3 and 4 year old in recent years. The report

⁴⁶ Available to families where each parent (or one parent in a single adult household) are earning the equivalent of working sixteen hours per week on the minimum wage

⁴⁷ DfE Take up of free early education entitlements Research Report September 2018 Nat Cen Social Research & Ask Research

concludes that “language, population mobility of children aged 0 to 4 years and SEND may be particularly important for explaining take up rates. In London, the super diversity of the population and its higher population mobility, in combination with higher costs to provide childcare, appeared to contribute to lower take rates.” The DfE commissioned report also reviews a range of actions used by Local Authorities to support take up. These include:

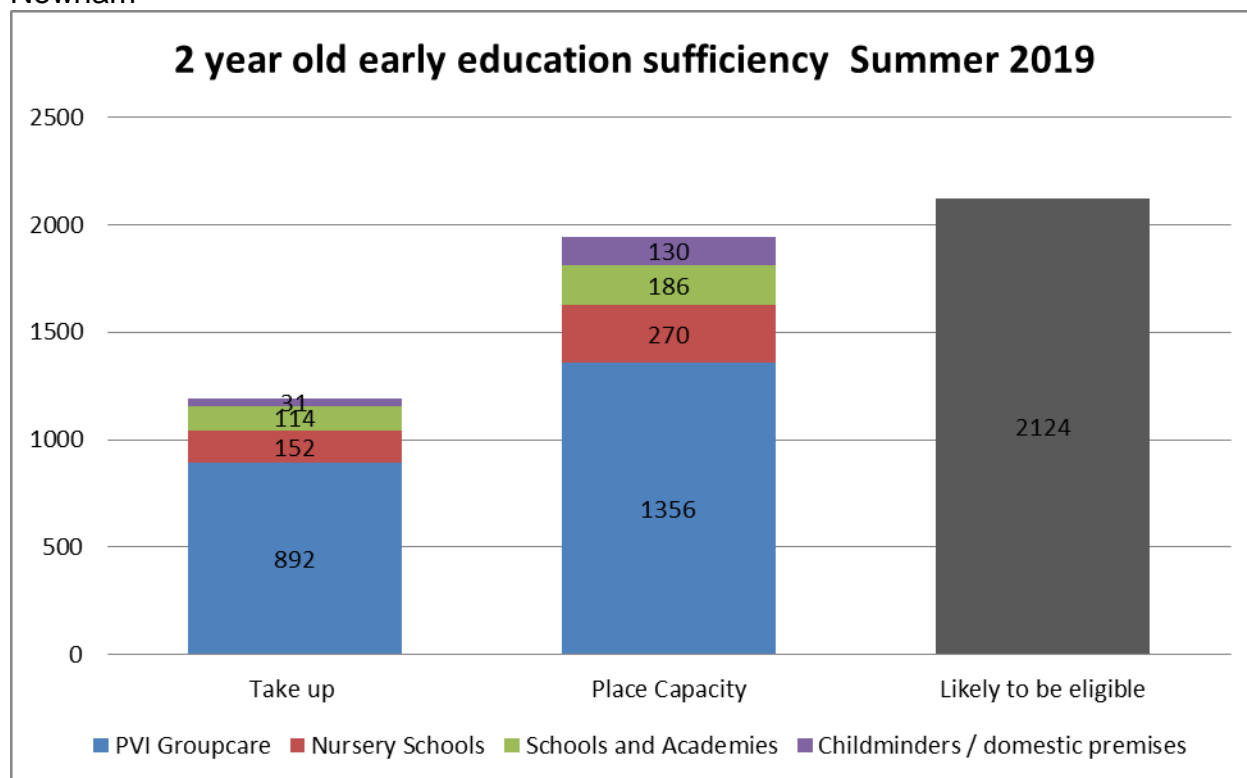
- Marketing and messaging approaches to improve parents awareness including targeted marketing, using specific languages, tailored messaging and utilising , provider marketing.
- A direct approach to those likely to be eligible and making them aware of the entitlement and its benefit such as “golden ticket”, door knocking, outreach and parent champions, volunteers and advocates.
- Partnership working with professionals and volunteers engaged in targeting eligible parents including health, social care and job centre advisors
- Improving the infrastructure of the application process to make it easier for parents to apply through on line applications, introduction of early years hubs and engagement with parents of SEND children.

The DfE review of the benefits of the approaches informs the gap analysis and action plan detailed at 1.3a and 1.3c.

Updated information on take up in summer 2019 is included in sections 4.11a, 4.11b and 4.11c.

4.11a Free Early Education for two year olds scheme.

Figure 13 Two Year Old Early Education in Newham



As is illustrated in Figure 13, the total number of children on the scheme at headcount in summer 2019 was 1,189⁴⁸. Total places available to the scheme was 1,942⁴⁹. The number of likely to be eligible Newham children according to the Department for Work and Pensions data in summer 2019 was 2,124.⁵⁰ Overall take up stood at 56% of those eligible.

The number of places available to the scheme has reduced by 242 (11%) compared to the CSA 2018, with the main factor being a drop in PVI group care places made available. Despite this, there is capacity to deliver existing take up and some growth, though there are not enough places to meet all likely to eligible children if everyone accessed a place. There are also 5 wards with less than 20 spare places in the summer term 2019, as is shown in the ward analysis that follows.

A Ceeda study on the cost of childcare in Newham⁵¹ found that every setting in the study had delivery costs higher than the £ 5.80 per child hour funding rate for two year old children, with the exception of 2 settings with very high occupancy rates. This is despite Newham Council funding providers at a higher rate than that provided to the Authority for this purpose. The study found that size and occupancy rates were key factors in determining sustainability. Newham will need to actively monitor the number

⁴⁸ Newham Child view Headcount Summer 2019

⁴⁹ Newham Early Years Agreement declaration 2019 & CSA Provider Survey 2019

⁵⁰ Department for Work and Pensions data summer 2019

⁵¹ Ceeda Counting the cost of childcare delivery in Newham 2017

of funded places being made available to the 2 year scheme, particularly in Plaistow North, Royal Docks, Boleyn, Canning Town North and Plaistow South.

Figure 14 Ward Analysis

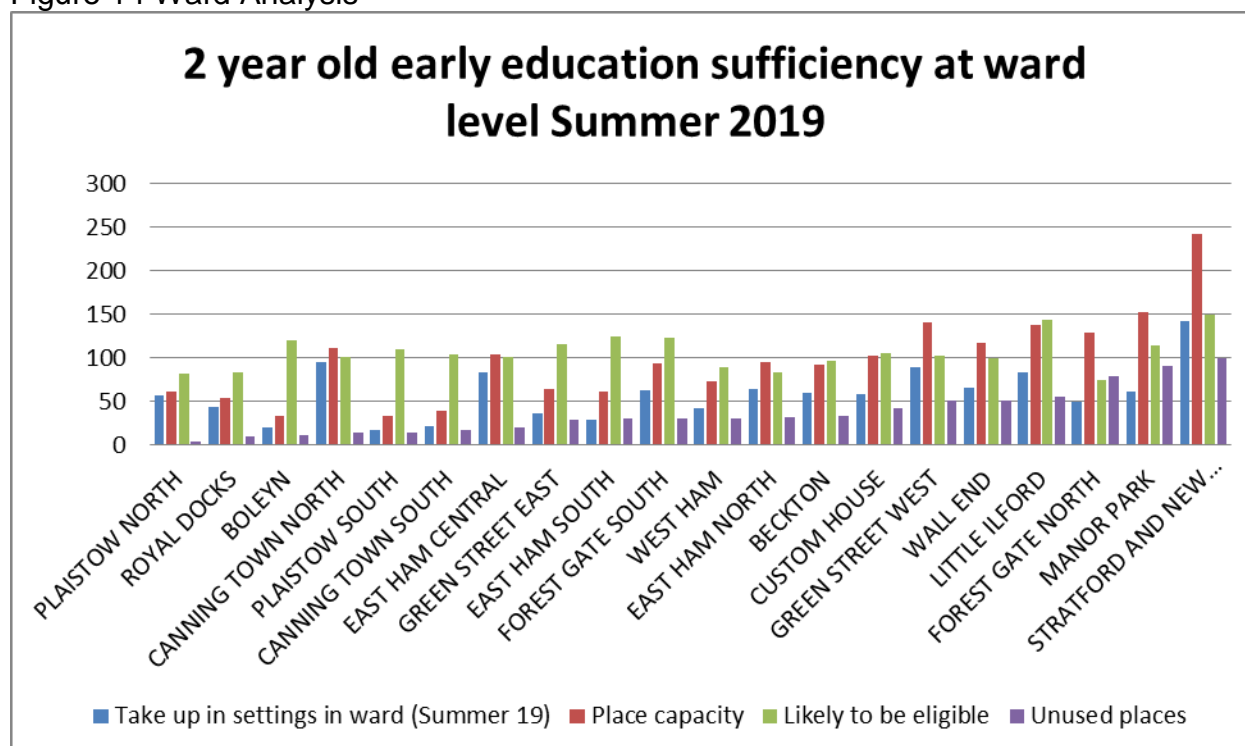


Figure 14 illustrates the pattern of take up, capacity and eligibility at a ward level in Newham.⁵² Those wards with the smallest number of unused places are Plaistow North (5), Royal Docks (10), Boleyn (12), Canning Town North (15) and Plaistow South (15). Those wards with the most unused places are Stratford and New Town (100), Manor Park (91) and Forest Gate North (79).

The total number of providers offering places in summer 2019 was 141 (unchanged from 2018). This includes 16 Schools/Nursery Schools, 65 day care settings, 10 Pre schools and 50 childminders.

⁵² Newham child view data Summer 2019/ Newham EY Agreements 2019/CSA Survey & DWP eligibility data Summer 2019

Figure 15

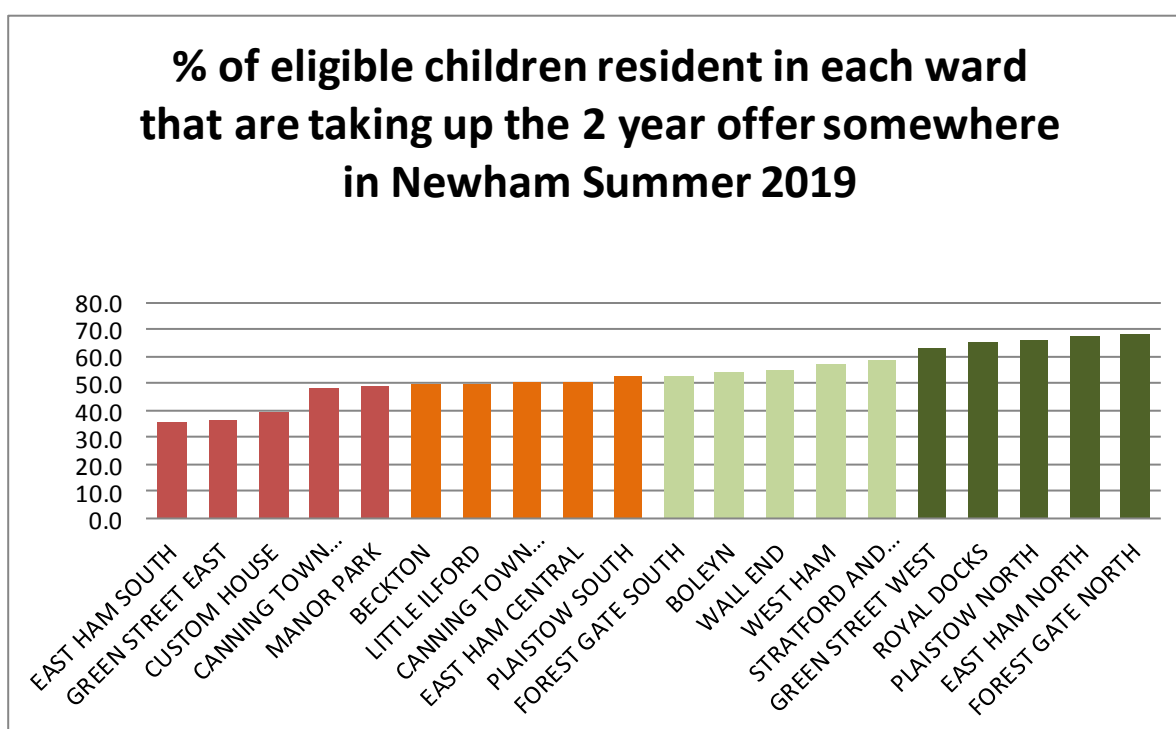


Figure 15 shows the take up percentage of eligible families living in each ward in the summer term 2019. This analysis is helpful in identifying those wards where more resident families are not taking up the offer. Reasons for non engagement will include active choice, lack of information and understanding or lack of suitable local provision.

The wards with the highest proportion of families taking up the offer in Newham are the wards with the least number of eligible families to engage with (Forest Gate North, East Ham North, Plaistow North and Royal Docks).

4.11b Free Early Education for three and four year olds.

Figure 16 Take up of the universal free entitlement for 3 & 4 Year Olds

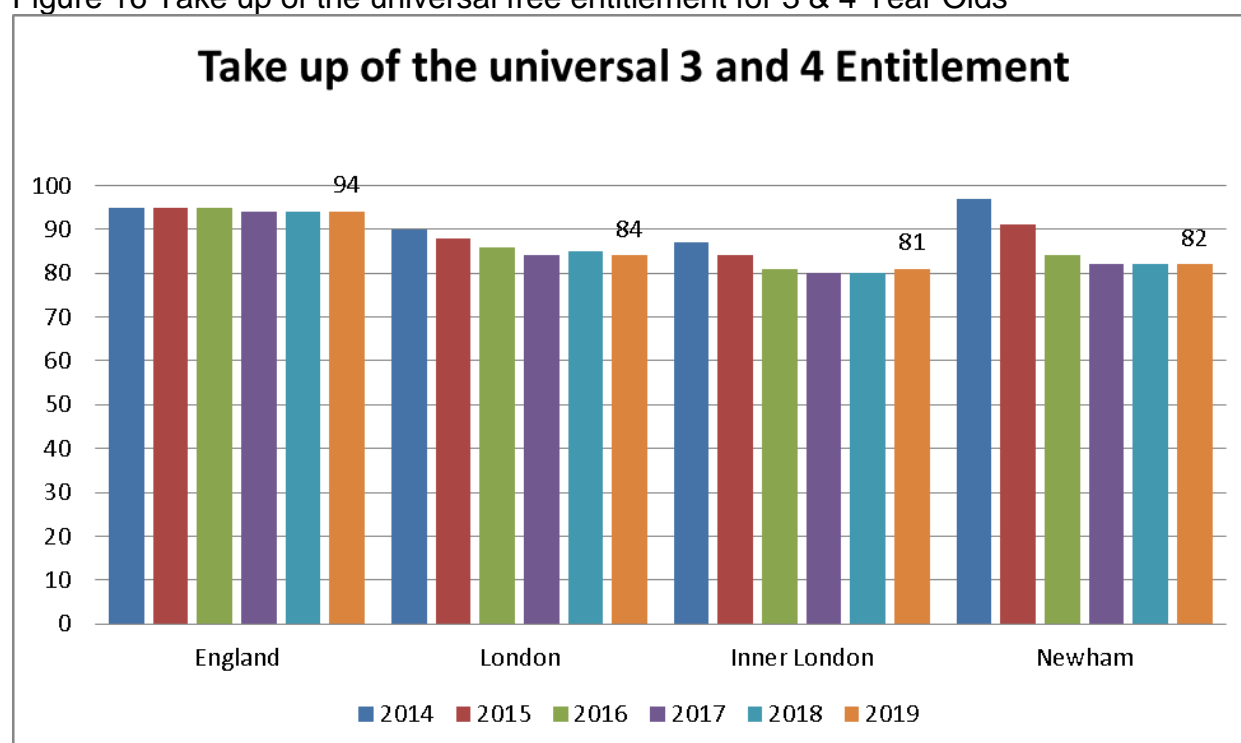


Figure 16 shows that Newham's take up of the universal three and four year old free entitlement over the period 2014 to 2019, and provides comparison with take up rates across England, London and Inner London.⁵³

Over the last six years there has been a decline in take up in Newham and in London. Newham's current take up rate of 82% is marginally above inner London average but is below the London and England averages and has fallen by 15% since 2014.

⁵³ Department for Education Census Data January 2019

Figure 17

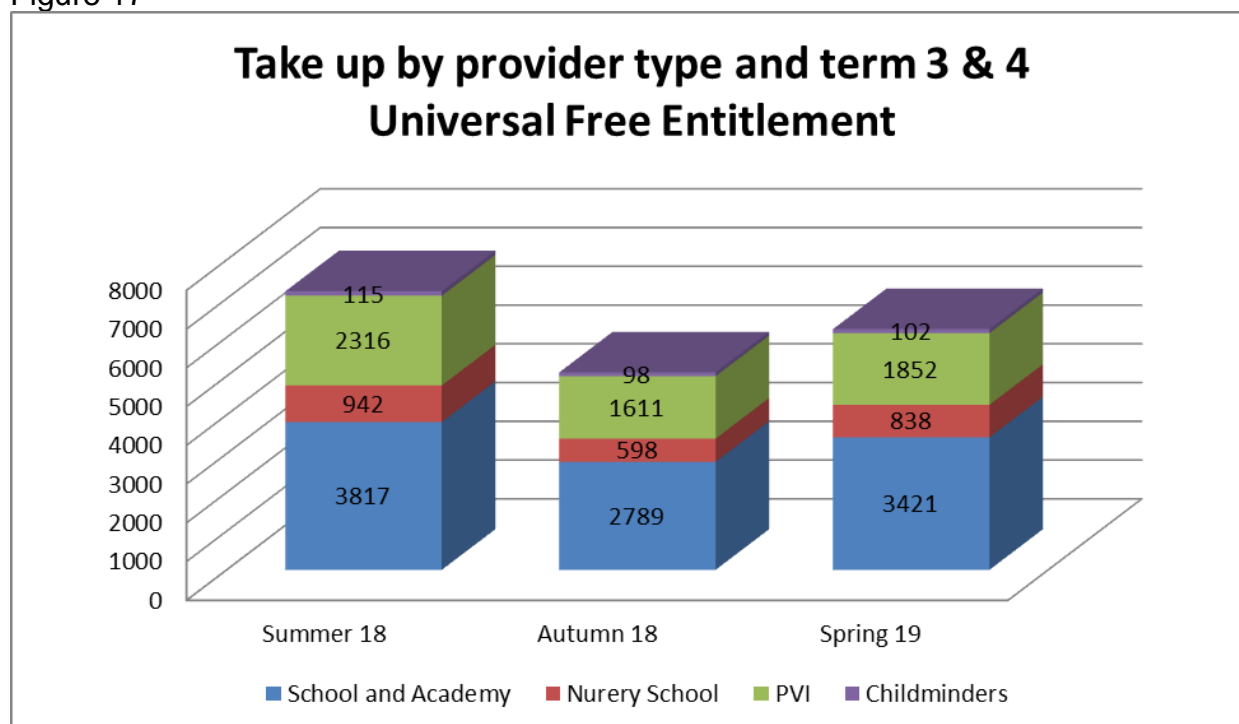


Figure 17 shows that the delivery of the universal offer is spread across all types of provider. Schools are the biggest provider type delivering the offer in Newham at 54% of all places. PVI group care deliver 31%, nursery schools 13% and childminders 2%.⁵⁴ Compared to the CSA 2018 the percentage of all pupils in group care settings has increased by 5%, while the percentage in schools has fallen by 5%. This may reflect more working parents choosing group care to access additional (30 hours scheme) funded places or fee paying services alongside their universal free entitlement.

Numbers fluctuate during the year reflecting the single entry point to school each September. The summer term has the highest occupancy and the autumn the lowest.

There are now also 45 providers offering a “stretched” free entitlement, so that parents can access their annual entitlement of free hours across the year, rather than being restricted to term time.⁵⁵ There were 44 stretched providers recorded in the CSA 2018.

4.11c 30 Hour offer for Working Parents

The Government’s election manifesto commitment to giving families where all parents are working an entitlement to extended 30 hours of free early education and childcare for their 3 and 4 year olds was introduced from September 2017. This means a total of 1,140 hours of free childcare per year for eligible families; 570 through the existing early education entitlement for all three and four year-olds, and 570 through the new entitlement.

Eligibility. The conditions for eligibility include:

⁵⁴ Newham Education 2,3 and 4 Year Olds Early Education databases 2019

⁵⁵ Newham Childcare Provider Survey 2019

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

Assessing demand for 30 hours places

It is more difficult to assess demand for 30 hours places than for either 2 year old funded entitlement or the universal free entitlement for 3 and 4 year olds. This is because eligibility is dependent on individual employment circumstances and the personal situation of parents and also on the their appetite to access this relatively new scheme. 30-hours childcare has now been in place for two years and there is take-up data for the first six terms (autumn 2017 through to Summer 2019). This provides baseline data for forecasting possible demand in the coming year.

In Newham the overall take up has increased by 15.1% between academic year 2017/18 and 2018/19. Table 20 below shows projected take up for each term in the 2019/20 academic year assuming a continuation of this growth in demand of 15.1%. Using this assumption take up in the peak summer term 2020 is projected to increase to 1,813 children. There remains significant potential for further growth up to an estimated current maximum of 2,845 children. A seasonal pattern to place take up, linking to entry to School reception in take each September, means that that Summer term is always highest and Autumn term always lowest.

Table 20
Newham 30 Hours Potential Take Up

30 Hours Take Up Actuals Autumn 2017 to Summer 2019 ⁵⁶				% change	Projected take up Autumn 2019 to Summer 2020		Maximum potential take up ⁵⁷
Autumn 17	749	Autumn 18	1054	40.7	Autumn 20	1213	1773
Spring 18	1253	Spring 19	1246	-0.6	Spring 20	1434	2386
Summer 18	1365	Summer 19	1575	15.4	Summer 20	1813	2845
Overall	3367		3875	15.1		4460	

⁵⁶ Newham Child View Termly Headcounts

⁵⁷ Newham analysis 2018 using Sheffield City Council Data Model

Sufficiency of 30 hours places

Figure 18

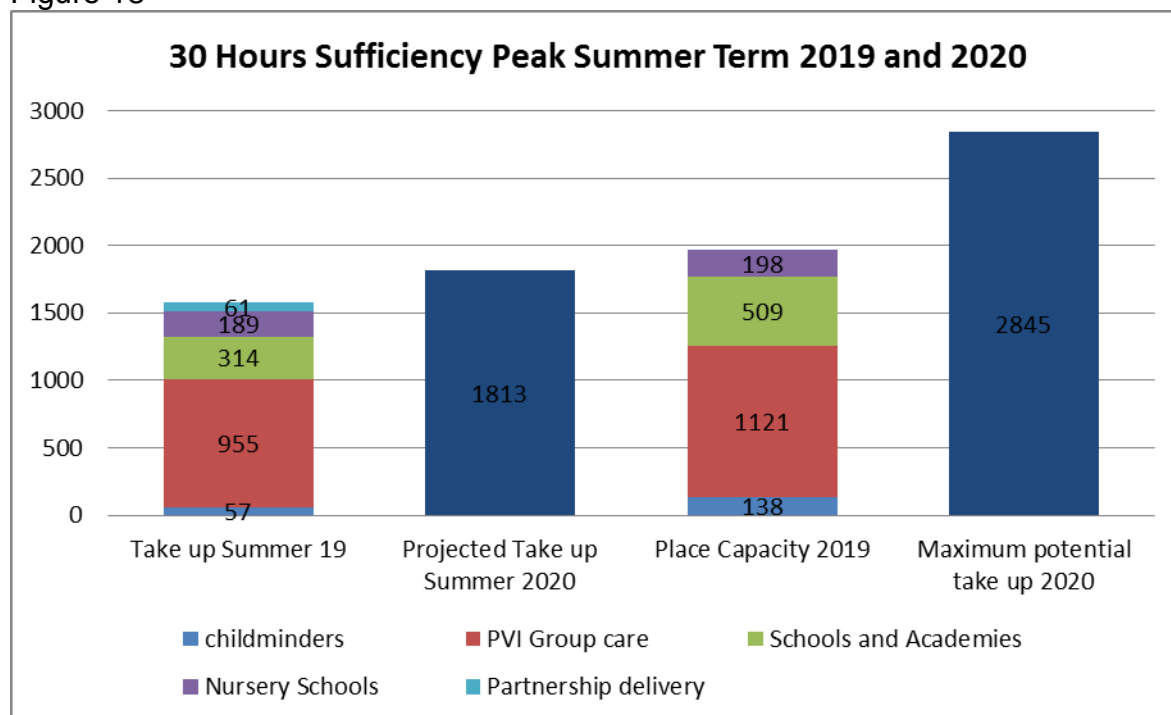


Figure 18 shows take up in the summer term 2019 by provider type and compares this with projected take up in summer 2020, current place capacity and maximum potential take up.

PVI group care offer the most places to the scheme at 1121, Schools and Academies offer 509, Nursery Schools 198 and childminders 138. Of the types of provider participating nursery schools are the closest to stated capacity at 95%, followed by PVI group care at 85%, Schools and Academies at 62% and childminders at 41%. There are 390 unused places in the summer 2019. Assuming capacity stays the same and using projected take up at that point the number of spare places available to the scheme would reduce to only 153 by summer 2020.

Overall, current place capacity is sufficient to meet peak demand in Summer 2019 and there is a small projected surplus of places in Summer 2020. However there are 6 wards with less than 5 spare places as is detailed in the ward analysis that follows.

Figure 19

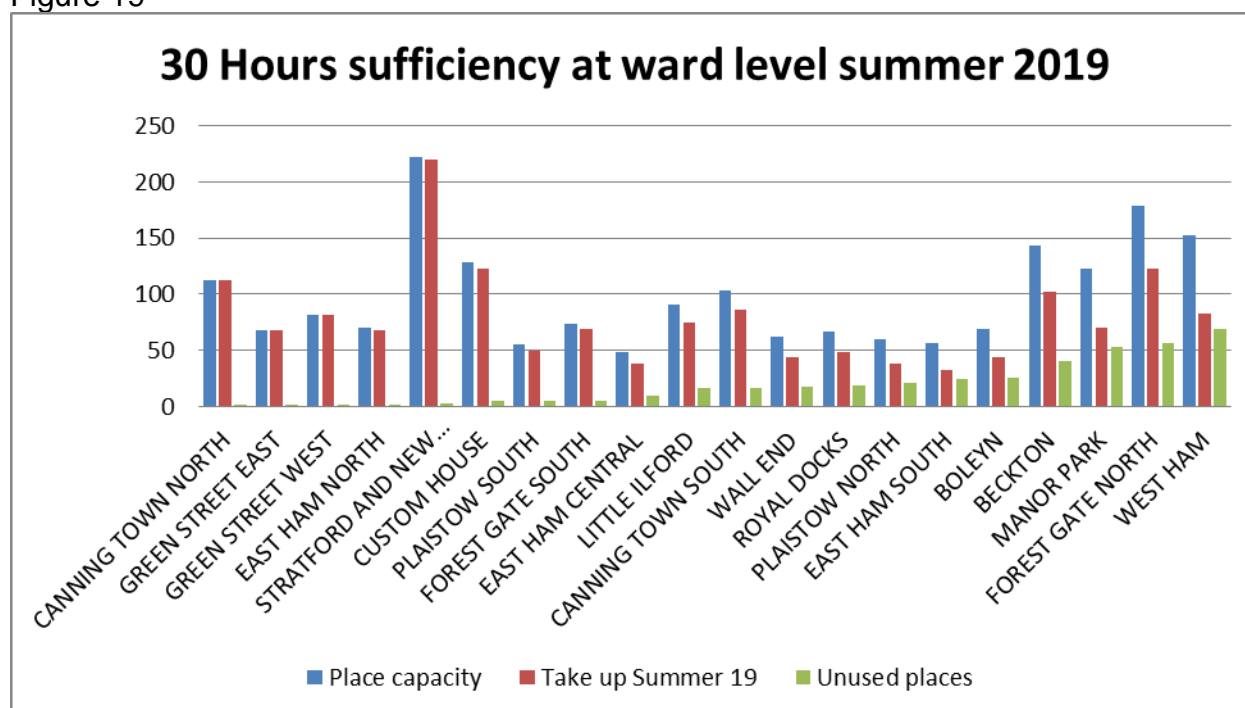


Figure 19 compares supply place capacity against take up in summer term 2019 in each ward. Over the borough there are 1,966 places available to the scheme, of which 80% are occupied in the summer term. 30 hours places are fuller than the overall occupancy for childcare places in the borough. There are eight wards with less than 10 unused places in the peak summer term including Canning Town North, Green Street East, Green Street West, East Ham North, Stratford and New Town, Custom House and Plaistow South.

There are now 171 providers offering 30 hours, an increase of 11 against the CSA 2018. School participation has increased with 39 now offering places alongside 74 PVI settings, 51 childminders and 7 Nursery Schools.

There is demand for places across provider types and delivery models reflecting the diverse needs of working parents. For many parents access to additional chargeable hours and year round provision is important, some parents need the flexibility that commonly a childminder can provide, for others a term time school or nursery school is valued and works. The vast majority of parents have chosen a single provider model but a small minority of parents have chosen partnership delivery to meet their needs.

Costs and sustainability

A study by Ceeda⁵⁸ looked at the cost of delivering extended 30 hour places in Newham. The illustrative analysis indicates that funding rates are likely to be sufficient for medium to large PVI settings with strong occupancy and for childminders with high occupancy. While the base rate represents a 40% uplift on the previous rate allocated for 3 & 4 year old early years delivery in schools, the illustrative analysis for the small

⁵⁸ CEEDA Counting the cost of childcare in Newham 2017

number of schools surveyed indicated that for these settings average costs exceed the base funding rate, with nursery school costs participating being the highest.

4.12 Provider Views on Business Challenges

A component of the CSA provider survey 2019 asked group care settings and childminders to identify their most important business challenge. Figure 20 shows the 53 responses from group care settings. Over 40% of responders (22) identified workforce recruitment and retention as their biggest challenge, attracting and retaining new customers (8), support available for children with SEND (8) and payment rates for the funded entitlements (8) were the next most common challenges identified.

Figure 20

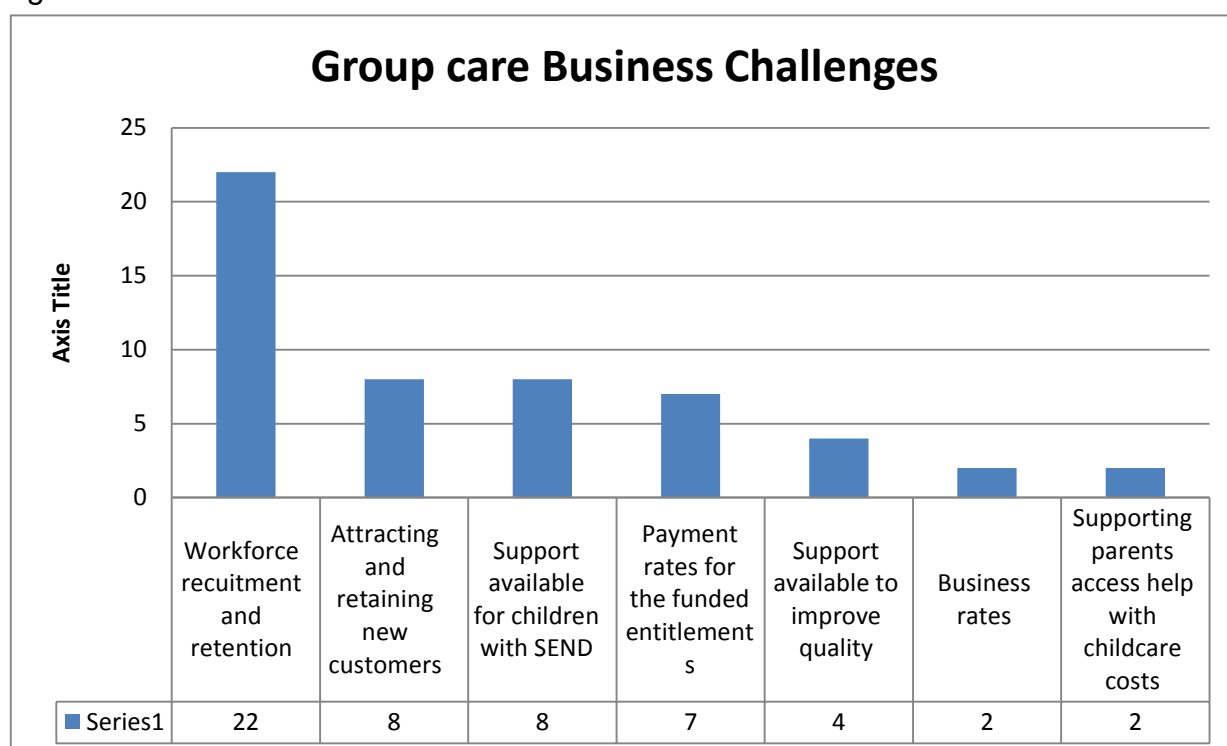
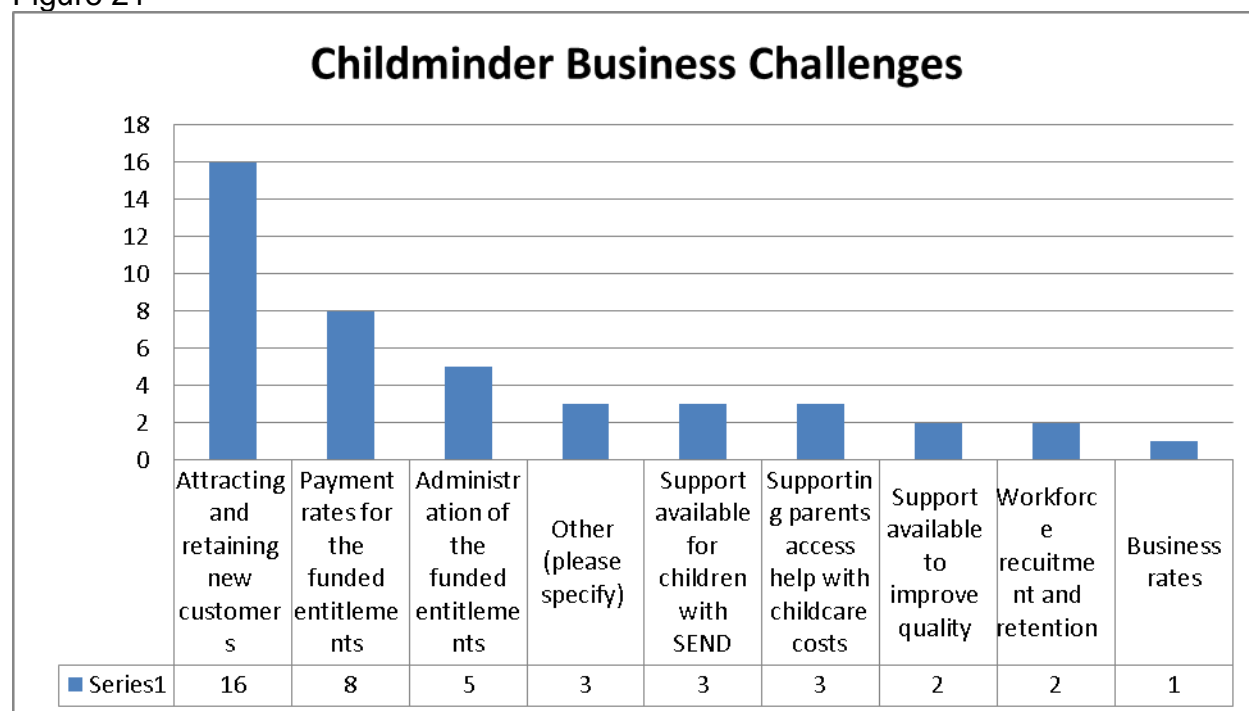


Figure 21 shows the 43 responses from childminders. 37% of childminders (16) identified attracting and retaining new customers as their biggest challenge, payment rates for the funded entitlements (8) and administration of the funded entitlements (5) were the next most common challenges identified.

Figure 21



5 Supply of Services for Over 5s

5.1 Types of registered provision for over 5s

Out of School provision includes breakfast, after school and holiday care.

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

- Childminders who are registered to look after children in their own home. Childminders are often flexible about the hours they work. Many offer a school pick up and collection service from local schools.
- Registered out of school provision provide a range of breakfast, after school and holiday care. Many offer a school pick up and collection service from local schools, nurseries and pre schools. They can be run on or off a school site and may be operated by private, voluntary or independent groups. Included here are also day care settings where they are registered for over 5s and are known to offer out of school services.
- Out of School activities operated by Primary Schools. Many schools provide extended services for children including after school activities such as homework clubs, film clubs etc. which may not be formally classed as childcare but which still provide a safe and fun environment for children whilst parents/carers are at work or studying. This year a survey of Newham's 67 Primary Schools and Academies was undertaken to endeavour to map the services that are available. This resulted in 32 responses, with 20 recording out of school activities. It is likely that we have under counted the provision of breakfast, afterschool and holiday clubs at Schools because of the limited response from the school survey. Care should therefore be taken in drawing conclusions from the incomplete data set.

5.2 Overall number of registered places available for over 5s

Number of school age providers and places

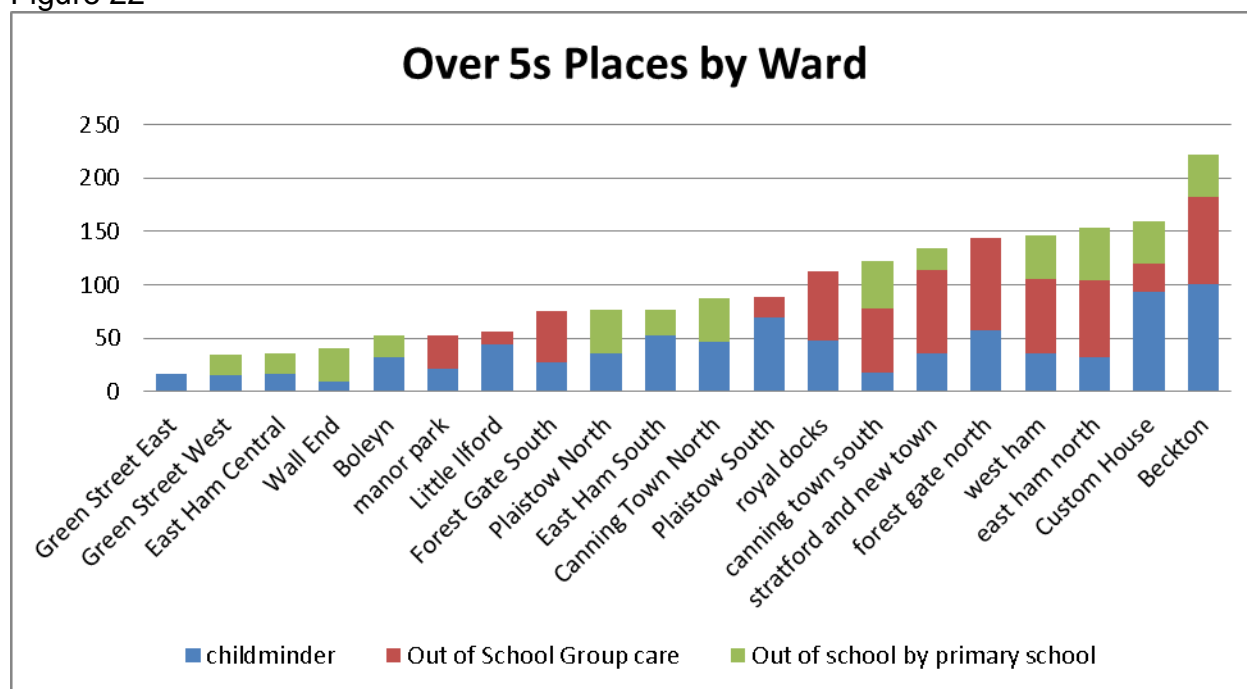
Table 21 shows that in total, there are 40 recorded providers of childcare for school age children during term time, and 18 providers of childcare for school age children during the holidays. There are also 151 childminders who may provide care for school age children

Table 21 Providers and places by type of provision	Number of providers	Number of places
Registered Childminders	151	805
Registered Group care Out of School	20	653
Primary School Out of School	20	431
Total	191	1889

5.3 Number of places available in each ward over 5s

Figure 22 shows that the distribution of the available 1,889 places across the 20 wards⁵⁹. The average number per ward is 94, but there is wide variation. Beckton (222), Custom House (160), East Ham North (154) and West Ham (146) have the most places. The least recorded places are in Green Street East (17), Green Street West (35) East Ham Central (36) and Wall End (41). Green Street East only has childminder places.

Figure 22

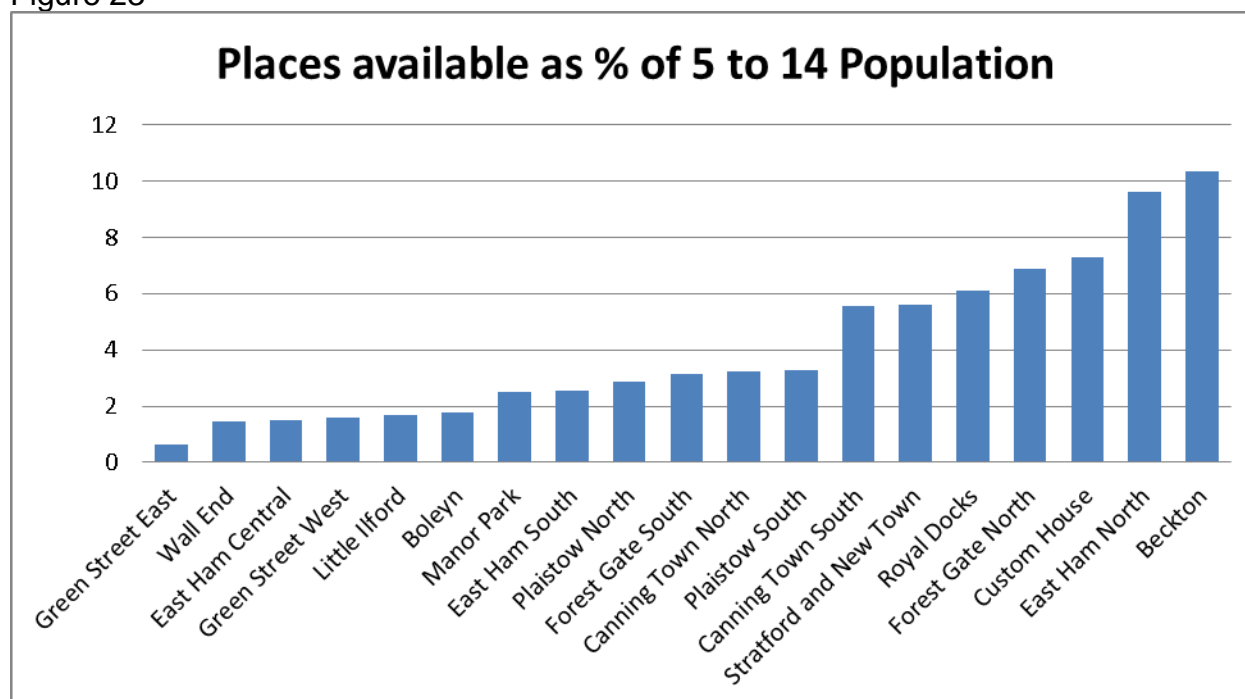


5.4 Places available as percentage of 5-14 ward population in each ward

Figure 23 shows the number of recorded places as a % of resident 5-14 population in each ward. The ward distribution translates to an average of 3.9%. Wards with the lowest recorded availability are Green Street West, Wall End, East Ham Central, Green Street West, Little Ilford and Boleyn. All of these show places available below 2%.

⁵⁹ Newham Child view Ofsted data Summer 2019

Figure 23



5.5 Number of places available per resident child

The recorded places available across the borough is equivalent to one place for every 26 children, which is a decline against the places reported in the CSA 2018 when there was a place for every 21 children. This reflects the higher population in the 5-14 age range. The wards with the lowest percentages of places available are Green Street East, Wall End, East Ham Central and Green Street West.. The wards with the highest proportion of places are Beckton, East Ham North and Custom House⁶⁰. Ranking by places per resident child is shown in the following Table 22.

Table 22 Wards are ranked by total places per resident child 5-14 in each ward		
1	Green Street East	1 place for every 159 resident children
2	Wall End	1 place for every 69 resident children
3	East Ham Central	1 place for every 67 resident children
4	Green Street West	1 place for every 63 resident children
5	Little Ilford	1 place for every 59 resident children
6	Boleyn	1 place for every 56 resident children
7	Manor Park	1 place for every 40 resident children
8	East Ham South	1 place for every 39 resident children
9	Plaistow North	1 place for every 34 resident children
10	Forest Gate South	1 place for every 32 resident children
11	Canning Town North	1 place for every 32 resident children
12	Plaistow South	1 place for every 31 resident children

⁶⁰ GLA Population Projections Central Trend based Projections 2017/ Newham child view Ofsted data Summer 2019

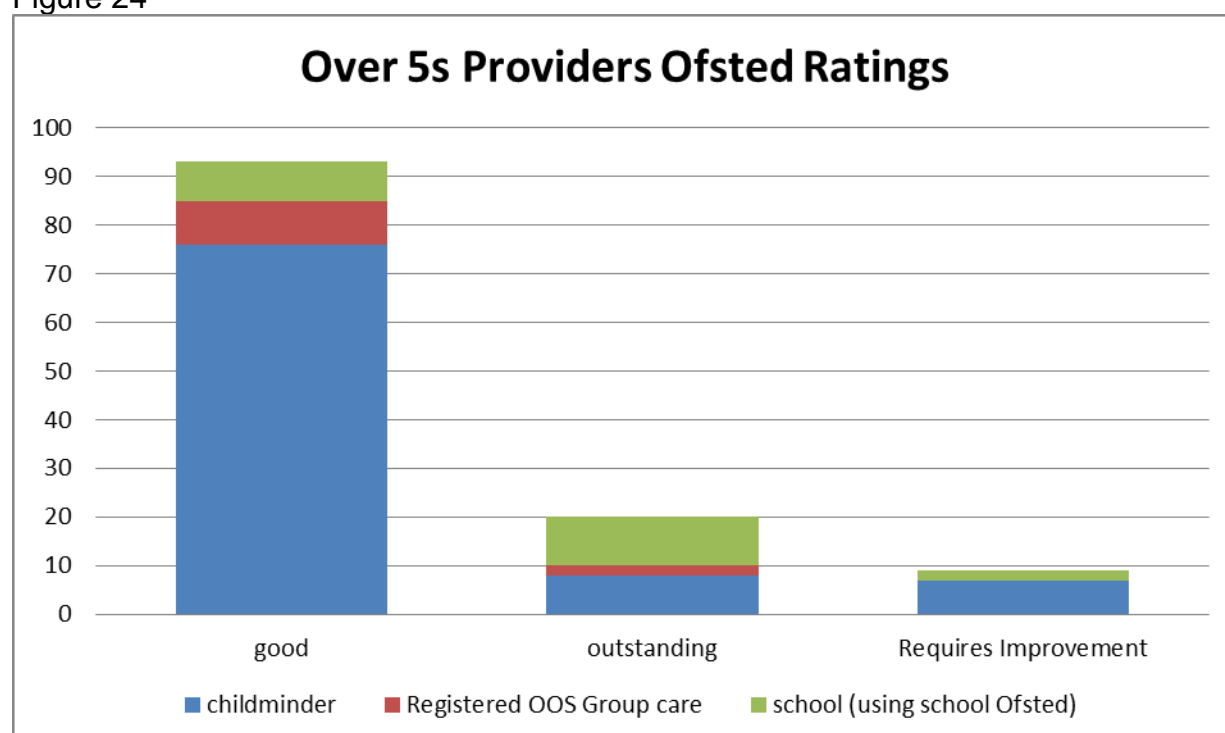
13	Canning Town South	1 place for every 19 resident children
14	Stratford and New Town	1 place for every 18 resident children
15	Royal Docks	1 place for every 17 resident children
16	West Ham	1 place for every 16 resident children
17	Forest Gate North	1 place for every 15 resident children
18	Custom House	1 place for every 14 resident children
19	East Ham North	1 place for every 11 resident children
20	Beckton	1 place for every 10 resident children
	Newham average	1 place for every 26 resident children

5.6 Provider Quality over 5s

Figure 24 summarises Ofsted ratings for Newham's Group care out of school providers that deliver places for over 5s in summer 2019.⁶¹ 93% of settings that have received an Ofsted judgement are good or outstanding.

In addition to the above there are 59 met inspection results and 10 new providers awaiting their first inspection.

Figure 24



5.7 Cost of childcare over 5s

Table 23 shows that services for over 5s are more expensive when delivered by a childminder rather than a group care provider or via schools. Childminder services

⁶¹ Newham Child view Ofsted Data Summer Term 2019

commonly include pick up or drop off and often operate over longer hours. Some of the schools surveyed do not charge for their breakfast or after school activities and the average number of hours are less. Where comparison can be made average charges in Newham for group care and childminders are above the average for England and are more aligned to London averages.

5.8 Occupancy of childcare for over 5s

Table 23 shows that services in schools are relatively full (78%) based on survey responses received. There is unused capacity in group care settings where just over half of places are occupied (53%) and childminders where occupancy is low (32%).

Table 23 Average Weekly costs Out of School Provision for over 5s						
Provider Type	Newham average hours per week ⁶²	Newham average hourly rate	Newham average weekly rate	Inner London ⁶³	Outer London	England
Out of School Group care						
Breakfast	9.6	3.44	33			
After School	16	4.46	71.3	57.8	63.3	58.2
Holiday Scheme	47.7	2.50	119.2	125.0	147.2	134.7
Average occupancy			53%			
Child minder Service						
Childminder breakfast / drop off	7.8	5.50	42.9			
childminder pick up / after school	14.5	5.23	75.9	110.5	81.6	65.6
Childminder full day	48.9	3.68	180			
Average occupancy			32%			
Out of school by Primary School						
Breakfast	5.6	1.73	9.7			
After School	10.9	4.21	45.9			
Holiday	35	2.47	86.3			
Average occupancy			78%			

5.9 Hours of operation

According to the Newham provider survey 2019 the average group care weekly hours for breakfast clubs in Newham is 9.6 hours per week. The average for childminders is 7.8 hours and for Schools 5.6 hours. Across all individual providers the range of hours offered is between 5 and 12.5 hours per week.

⁶² Newham Childcare Survey 2019

⁶³ Coram Family and Childcare Trust Childcare Survey 2019 and Holiday Childcare Survey 2018

The average weekly hours for group care after school clubs in Newham is 16 hours per week. Childminders average hours is 14.5 and Schools is 10.9 hours. The range of hours offered across all individual providers is between 10 and 25 hours per week.

The average weekly hours for group care holiday club in Newham is 47.7 hours, for childminders it is 48.9 hours and for schools 35 hours. The range of hours offered across all individual providers is from 25 to 55 hours per week.