

Childcare Sufficiency Assessment 2024-25



Childcare Sufficiency Assessment (CSA) 2024/25

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1. Executive Summary

1.1 Introduction

Newham's new CSA is produced at a key point in the Government's extension of childcare support for families. This includes an expansion of funded childcare for working families with children under three and an increase in the availability of wraparound care for primary aged children. The new CSA reports on local progress in implementing the childcare expansion, our local strategy to support families' access services and our plans to support providers to deliver services that meet the childcare needs of local residents.

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

We have assessed sufficiency using evidence about the need for childcare and the amount of childcare available and this includes both the views of local parents and childcare providers. In this year's report we also provide an assessment of future sufficiency for the final stage of expansion of the working parents under three scheme. In September 2025 the entitlement for eligible families moves from 15 hours to 30 hour per week.

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

Newham's last childcare sufficiency assessment (CSA) gave a picture of sufficiency in 2023/24 and we report back on the progress that was achieved against the priorities identified then at 1.2. The new 2024/25 assessment compares how the provision of childcare for under-fives and school age children has changed since our last report and takes a view on the current and future sufficiency of provision. The findings are summarised at 1.3, with a new action plan for 2025/26 detailed at 1.4.

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

1.2 Progress delivered against Newham's CSA Action Plan 2024/25

1.2a Funded Early Education and Childcare Entitlement Expansion – actions delivered in 2024/25 included:

- updated mapping of supply and demand at ward level for the expanded scheme
- development of information and guidance packs for childcare providers in relation to the expanded scheme
- delivery of briefings for all types of childcare providers in relation to the expansion with separate briefings for other key stakeholders and parent facing professionals
- development of a termly promotional campaign focusing consecutively on each of the separate funded entitlements and the delivery of more community focused outreach and including social media, banners, flyers, direct mail, website refresh.
- promotion of the expanded funded scheme to engagement with Newham based established childminders, growing the number signed up to offer funded entitlement places from 39 to 63 settings.
- growing the number of (15 hour) funded places available to the expanded under 3s scheme by 217.
- administration of 2 capital grants rounds, awarding 43 grants to Newham childcare providers that will create up to 430 thirty hour funded childcare places for under 3s.
- recruitment of 1,666 eligible families with children under 3 who are benefitting from the expanded offer in spring 2025.
- monitoring of impact on overall demand and supply of childcare across all funded and paid for childcare and maintaining strong progress in take up rates across all existing funded entitlements.

1.2b New Wraparound Offer for Primary Aged Children – actions delivered in 2024/25 included:

- Recruitment of a Wraparound Coordinator
- Updated mapping of supply and demand for the wraparound care expansion
- Delivery plan submission and approval by the Department of Education, drawing down funding for the project.
- Development of revenue and capital packages of support for wraparound providers creating new wraparound places.
- Engagement and recruitment of providers including school, PVI Out of School and childminders, creating a total of 462 new or expanded 8am to 6pm wraparound places
- Administration of two rounds of revenue grants, awarding 43 grants to Newham childcare providers.
- Administration of two rounds of capital grants, awarding 6 grants to Newham childcare providers grants Newham school pupils.
- Submission of an updated delivery plan detailing our plans to create more places and maximise reach across Newham Primary Schools.
- Sharing good practice guidance including new childcareworks hub resources around business planning, marketing, quality and sustainability with childcare providers.

1.2c Quality – actions delivered in 2024/25 included:

- The quality improvement team (comprising in early years advisory teachers (EYATs) and Newham Early Education Practitioners (NEEPS)) have continued to fulfil our Statutory duty in supporting practice development in new settings and those with an Ofsted grade less than good, through a specific programme of CPD and individual action planning following visits.
- Settings due Ofsted have been targeted for support from EYATs and NEEPS

- Universal support has been delivered through our continuing professional development (CPD) programme, which has been developed following consultation with providers, and through forums and quality audits
- NEEPs have supported childminders through networks and forums, and continue to develop and deliver CPD and support the quality audit and safeguarding arrangements.
- Updates of the revised EYFS shared through forums and reviewed CPD

1.2d Workforce – actions delivered in 2024/25 included:

- Staff recruitment webpage has been made available for Newham providers to advertise vacancies.
- Outreach has been delivered at Job Centre Plus Jobs Fairs, where we have promoted childcare as a career option
- New childminder induction programme created and delivered
- Engagement and promotion of DfE “Be part of something big” recruitment campaign for the childcare sector.

1.2e Information – actions delivered in 2024/25 included:

- Refreshing the early years communication plan, including adding new strands to promote the expanded funded childcare offer for children under 3 and wraparound offer for primary aged children. Marketing tools utilised include websites, social media, banners and posters, direct mail and outreach.
- Updated content for the Newham Families Information Service and Local Offer website
- Provision of responsive frontline telephone and mailbox support service assisting families navigate the different childcare pathways and signposting to entitlements available to them.
- Outreach activities raising awareness of childcare services in Newham, linking with community groups, health visitors, children’s centres, Job Centre Plus and other stakeholders.
- Direct mail campaign, which distributed letters to Newham families alerting them to the availability of funded childcare, including the new expanded funded childcare offer.
- Newsletter shared with Newham based childcare settings, providing information and updates on developments in early education and childcare.
- Participation in a DfE working group aiming to raise awareness of the new expanded childcare offers. Utilisation of DfE toolkits and communications assets to promote existing and new funded childcare offers.

1.2f Special Education Needs and Disabilities (SEND) – actions delivered in 2024/25 included:

- Ongoing review and update has taken place of the Local Offer, which has taken into account parental feedback.
- Ongoing support has been given to providers by the area SENCO team. Concerns have been raised via early notification and responded to. Delivery of SEND specific training continues and is well attended.
- Numbers of early notification continue to rise with colleagues from early help, education and health identifying needs early.
- Continue to use data to inform improvements and embed systems to capture the scale of SEND so that provision can match need, resulting in a consistent approach to the allocation of services and funding.

- Termly reports are produced from the early notification activity and shared with colleagues from health, education and early help. The information is used to improve the processes both in respect of early notification but also as a SEND system.

1.2f Sustainability – actions delivered in 2024/25 included:

- New start up packs developed for PVI and Childminders, including new resources
- Sharing findings of our most recent sufficiency assessment and mapping around childcare expansion with providers to help them target areas of need and opportunity.
- Briefing providers on funding opportunities available linked to the Government's expansion of childcare plans.
- Maintaining a risk register to identify and support providers facing significant challenges. One to one support for settings raising issues around sustainability.
- Business challenges survey conducted as part of the refreshed childcare sufficiency assessment, with findings fed into our action plans for 2025/26.

1.3 Childcare Sufficiency Assessment Findings 2024/25

1.3a National Context and Trends for Early Education and Childcare in 2024/25

Early Years education and childcare is in another period of significant change and challenge. The new Government has confirmed it will continue the ambitious expansions planned by the last administration, while also adding further initiatives aimed at widening access to early education and childcare for the benefit of children and families. The next steps in the expansion include:

- Doubling of the recently introduced childcare entitlement for working families with children aged between 9 months and three (15 hours will be moving to 30 hours in September 2025).

To support the expansion of funded nursery provision the new Government is bringing forward a capital programme to deliver 3,000 school based nurseries.

- Continuing with the initiative to expand out of school places that wraparound the day for children in Primary Schools.

Alongside this existing initiative the new Government is also planning to bring in free breakfast clubs to every primary school.

To achieve the growth of early education and childcare services intended will require the engagement of good quality providers from all types of provision. Key challenges for the expansion include growing capacity, ensuring quality, recruiting and developing workforce and supporting sustainability. Local Authorities play a key role in delivering on the expanded childcare offer in their local area.

The challenge of growing capacity is highlighted by Ofsted's childcare providers report.¹ This shows that nationally there was a modest 1% increase in the number of childcare places offered by those on the early years register between August 2023 and August 2024. Furthermore there was actually a decline of 2% in the number of registered providers, mainly due to the continuing decline of childminder numbers. There is wide variation in the access to childcare across the country, with deprived areas with low household incomes experiencing low access to childcare, while other advantaged areas with higher incomes tend to have high access to childcare².

A significant barrier to growth is the national workforce shortage impacting many providers. An impact report for the London Mayor's Strong Early Years London (SEYL) programme found that, in spring 2022, 67 per cent of all London nurseries and preschools had staff vacancies, and 94 per cent were finding them hard to fill. Government has acknowledged the significant challenge around growing workforce and has put in place a national recruitment campaign, training and apprenticeship initiatives to support required expansion.

The quality of early education and childcare providers has improved overall, based on the most recent Ofsted inspections. 98% of childcare providers were judged good or outstanding, an increase of 1 percentage point in August 2024, compared to August 2023.

Affordability for families and rising costs for providers is an on going issue nationally, despite the recent uplifts in funding provided by Government.

The Coram Family and Childcare Trust national childcare survey 2024 found that prices for charged hours increased substantially. For example, prices increased in 2024 for a part time (25 hours) place in a nursery for children in Great Britain, by 7.4 percent. A report by the IFS³ found that rising costs for childcare providers including salaries, energy costs, rent and food grew by 25% between 2016 and 2023. Most recently, rises in employer National Insurance Contributions and the minimum wage announced in the Autumn 2024 Budget will leave many childcare providers with new expenses.

A continuing national trend is the increase in children accessing SEN support. The percent of pupils with an Education Health Care Plan (EHC Plan) increased from 4.3% in 2023 to 4.8% of all pupils in 2024. The percent of pupils requiring special educational needs support without an EHC plan increased from 13% in 2023 to 13.6% in 2024⁴. The increase in children with SEND requires an expansion in skilled and trained practitioners able to provide appropriate care and support.

1.3b Newham's Local Childcare Sufficiency main findings 2024/25

Newham's Childcare Sufficiency Assessment provides a picture of Newham's childcare sector and market conditions in 2024/25, and should be seen against the national context detailed above.

¹ [Main findings: childcare providers and inspections as at 31 August 2024 - GOV.UK](#)

² [Commentary: Changes in access to childcare in England - GOV.UK](#)

³ [Early years | Institute for Fiscal Studies](#)

⁴ [Special educational needs in England, Academic year 2023/24 - Explore education statistics - GOV.UK](#)

The childcare sector in Newham has proven to be robust and adaptable in meeting the many challenges faced in recent years. Our most recent Ofsted profile data shows an improving picture in terms of inspection outcomes. The overall places available to early years children has been maintained, and there is new place creation in progress through Newham's childcare expansion capital grant scheme. The situation for out of school provision for older children is improving, with an expansion of wraparound places available to children of primary school age. There is sufficient childcare in Newham to meet current demand. However, additional capacity will be needed to meet expected demand when the expanded funded childcare scheme is fully rolled out in September 2025.

The operating environment for childcare remains challenging, with recruitment and retention of staff and business cost inflation being particular issues. Early years and childcare is now attracting more Government focus and resources. There are opportunities ahead to grow new services to provide the high quality early education and childcare that parents need. Intensive work will need to continue to ensure providers are supported and enabled to meet the challenges ahead.

- Ofsted outcomes have improved in the latest Ofsted profile data now available for Newham. (January 2025) This shows 96% of group care settings as good or outstanding and 98% of childminders as good or outstanding.
- Access to early years childcare in Newham is little changed overall in 2024. Provision available to families comprises a combination of funded "free" and charged for childcare and the number of early education and childcare places available to Newham residents has flat lined at 6,259 places (0% change) since 2023. The number of group care places has increased (+79), while the number of childminder places has continued to fall (-82). We do expect to see places increase over the coming year through Newham's thirty hours capital scheme. There continues to be some improvement in the number of places in wards with the lowest availability. Over the last five years, those wards with the least places per resident child have seen places created, so that in 2024 the bottom four wards (Plaistow North, Green Street East, East Ham South and Boleyn) had a total of 430 early education and childcare places compared to 342 in the bottom four wards in 2020.
- Take up of the funded entitlements continues to grow and is a good news story for Newham. Take up of the funded early education scheme for families receiving support (previously named "disadvantaged") has improved to 72%. Despite having the highest reach target of any London Authority, the take up rate is now 5% points higher than the London average and is closing on the national average. Similarly take up of the universal entitlement for 3 and 4s saw Newham's take up rate rise to 90%, 5% points above the London average and closing on the national average of 95%. The 30 hours scheme for working parents with 3 & 4s saw 1,426 children on the scheme at census, a small decline against the highest take up recorded so far in 2023, which was 1,458.

The addition of 15 funded hours for working parents with children under three started in April 2024. Over the three terms of the scheme so far, participation has grown from 695 to 1,666 children. We anticipate further growth in demand as awareness increases and as the hours available to families doubles to 30 in September 2025.

- The number of places available to the funded entitlements schemes has also grown. The funded hours are now the main income source for most providers and there is an uptick in participation from providers in the funded "free to parent" schemes. In addition, more schools

are now offering places for children under three. There are sufficient places for current demand.

However, further work is needed to secure sufficient places and hours for the final stage of expansion of the under threes scheme for working families in September 2025. Our current estimate is that a further 475 thirty hour places will be needed, 300 of these being for under twos. Places are being created through Newham's 30 hours capital programme and more places may be added to through the DfE School Nurseries Capital Fund. The recent success in recruiting more childminders to offer funded places will need to be built on to meet demand for under twos, in particular.

Overall occupancy of early years places (comprising both funded and fee paying hours) stands at 58% for group care settings and 55% for childminders in our survey conducted in autumn 24. This unused spare capacity is another potential source of additional places for the funded childcare expansion. A number of providers cite challenges around staff recruitment and retention as reasons they are not operating at full capacity.

We plan and expect that there will be sufficient places for the expanded thirty hours scheme from September 2025.

- Parent satisfaction with the childcare services has improved in Newham in 2024, with 82% of surveyed parents saying they were satisfied overall with their childcare arrangements. 90% of responding parents also said they had been able to access good or outstanding early years childcare.

Nearly half of parents report that affordability is an issue and other common concerns raised by parents relate to flexibility of childcare, the availability of suitable places for SEND children and the availability of holiday childcare for school-aged children.

- The cost of fee-paying childcare has increased significantly in Newham, as is reflected in the parent responses above. Our survey in autumn 2024 reported a 14.9% increase in charges over a year for early years group care settings based in Newham.
- Parent awareness of the existing funded entitlements and other help with childcare costs continues to improve locally and is higher than reported nationally for the funded entitlement schemes. At the time of our Newham parent survey, in autumn 2024, there was lower awareness of the new expanded funded entitlement for under threes, but this is higher than reported last year. Newham has a promotional campaign to raise awareness for the new scheme, which is on-going.
- In a survey of Newham group care settings, the biggest business challenges identified were staff recruitment and retention, business cost inflation, attracting new customers, cash flow and understanding changing patterns of childcare needs. To meet the increased demand that will flow from the expanded childcare offer, providers will need to be able to afford, recruit, support and retain appropriately trained and experienced staff.

- The number of children identified with Special Educational Needs or disabilities (SEND) in Newham is increasing in line with the national trend. This has resulted in an increase of referrals for support made by early education and childcare providers in the borough.
- Strong progress has been achieved in the local implementation of the national wraparound childcare programme, with a total of 462 new or extended 8am – 6pm term time wraparound places have been created in Newham between August 2024 and February 2025. Providers are receiving start-up funding to support them over their first year of operation and work is planned to ensure longer-term sustainability and quality. More places are planned to start in spring 2025 and over 2025/26.

The number of out of school holiday places available is much smaller than for term time wraparound care. Holiday care is not covered by the national wraparound childcare programme. Newham's Holiday and Food programme does provide valuable holiday places for families in receipt of qualifying benefits or are otherwise vulnerable. Our parent survey identified that for many parents not eligible for this scheme, it is difficult to find holiday care that meets their needs.

1.4 Gap analysis and recommended actions for 2025/26

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

1.4a Funded Early Education and Childcare Entitlement Expansion

The new expanded childcare offer will allow up to around 2,500 Newham children to benefit from 30 funded hours of early education after the final stage of implementation in September 2025. While there are sufficient places available currently, additional capacity will be needed from September 2025.

Funded Entitlement Recommended Actions 2025/26

- To continue to monitor places and take up for each of the funded entitlements to ensure there remains sufficient capacity to meet peak demand for each scheme.
- To support and monitor place creation underway through Newham's capital childcare expansion grant.
- To build on the increased participation of childminders in funded early education, particularly for children under three
- To identify other opportunities to support place creation in areas of need, such as through the School based nurseries capital grant.
- To work with providers to adapt service offers to meet working parent's childcare needs.

Encourage a mix of delivery that includes part week delivery or stretched offers over the full year, where there is demand for this.

- To continue to deliver training packages for settings around quality and SEND to ensure best practice in delivery.
- To continue to brief relevant parent facing professionals on the new and existing funded entitlements and other help with childcare costs.
- To run a termly promotional campaign focusing on each of the funded entitlements over 2025/26.
- To deliver refresher briefings for staff administering the funded entitlements in early education and childcare settings.
- To support providers with the administration processes around eligibility and funding, working to reduce the administrative burden of operating as a funded entitlement provider.
- To work with providers to ensure that when children transfer between providers, a smooth transition is made in the best interests of the child.

1.4b Out of School and Wraparound Offer for primary aged children Actions 2025/26

- To seek DfE approval of our updated delivery plan to create additional 8-6 provision wraparound provision with associated revenue start up and capital funding.
- To expand the reach of the wraparound scheme to maximise the number of Newham primary school children and families can access care, if they need it.
- To continue to work with all relevant provider types to ensure there is opportunity to engage with the expansion.
- To monitor and support providers identifying support needs around quality, sustainability or other development areas.
- To further develop the wraparound communication plan, promoting the emerging offer to parents and engaging with key stakeholders such as Job Centre Plus and Newham Work.
- To explore potential opportunities for growing holiday care and links to the Holiday and Food programme.

1.4c Quality Recommended Actions 2025/26

- To recruit an Early Years Advisory Teacher to support the quality improvement work of the team with early years providers.

- To continue the quality improvement team work to fulfil their statutory duty to support practice development in all new settings and those with an Ofsted grade less than good. This will include a specific programme of CPD and intensive support through individual action plans following setting visits.
- To monitor settings termly, taking in to consideration sustainability, staff changes, leadership and management and safeguarding, identifying any settings at risk, and targeting support where necessary.
- To target settings due Ofsted and provide additional support from EYATs and NEEPs, through CPD and visits
- To continue universal support to all providers through our professional development (CPD) programme, following consultation with providers, forums, networks, audits and moderation of these.

1.4d Workforce Recommended Actions 2025/26

Newham providers continue to identify workforce recruitment and retention as one of their biggest business challenges. It is also acknowledged by the Department of Education as a national issue. Early education and childcare is a people based business and all providers rely heavily upon the quality and availability of their workforce to provide a quality service. The success of the new expanded childcare offer is strongly reliant on the recruitment and retention of a highly motivated, quality workforce.

- To include in our communications plan a social media campaign to promote the early years sector and careers.
- To raise awareness of the Government's childcare workforce recruitment campaign.
- To keep abreast of best practice solutions in the recruitment and retention of early years and childcare workforce and share resources, case studies, practical solutions and approaches with providers.
- To promote the use of a vacancy page for providers to use to promote job vacancies at their settings.
 - To link to Job Centre Plus, and local colleges and secondary schools to explore options for collaboration around apprenticeships and work pathways in early education and childcare.
 - To explore new initiatives to support with the recruitment and retention of childminders.

1.4e Information Recommended Actions 2025/26

- To refresh Newham's early year's communication plan, taking into account evidence from

monitoring and research of what works in engaging and communicating with families, including the most vulnerable.

- To review and further enhance the new “Local Offer” website to ensure parents are able to access suitable specific childcare information that meets their needs.
- To continually strive to simplify the parents’ customer journey and offer handholding support where appropriate. Including increasing our use of social media, direct messaging, community language content and parent workshops.
- To continue to ensure that local sources of advice and support such as Families Information Service, Childcare providers, Health Visitors, Children’s Centres, Job Centre Plus, and Newham Work are aware of and disseminate the latest information. This will include briefings to strategic leads as well as parent/ carer facing staff and will include the regular distribution of relevant marketing materials.
- To promote the government’s websites www.childcarechoices.gov.uk and www.gov.uk/childcare-calculator to parents and providers.
- To raise awareness of the range of childcare options that are available to meet different parent needs including the stretched offer, flexible care available through some childminders or partnership delivery and services available to shift and weekend working parents.
- To facilitate the sharing of provider information to parents with regard to how they support SEND, language development, cultural, faith and belief needs.
- To continue to provide a frontline telephone information and support service assisting families navigate the different childcare pathways and signposting to entitlements available to them
- To continue to deliver outreach to relevant community groups and partners where families can be engaged, raising their awareness of the early education and childcare offer.

1.4f SEND Recommended Actions 2025/26

- To continue to ensure children receive the additional support that is their right, providers are supported to offer appropriate and effective support from the Area SENCO team, and through a relevant CPD offer.
- To continue to promote the Level 3 accredited SENCO course for early years practitioners in all settings, including early years units in schools. To aspire to have a qualified SENCO in every setting in newham. To monitor the take up of places accessed by children with SEND or emerging needs, and to address any issues in relation to access in all areas settings in the local area.
- To continue to work collaboratively with colleagues from early help, education and health so

that children's needs are identified early and support provided. To ensure all colleagues particularly those in schools are using the early notification to access service and SENIF .

- To continue to use data to inform improvements and embed systems to capture the scale of SEND so that provision can match need, resulting in a consistent approach to the allocation of services and funding. Within this the parent voice is heard and used to improve their experience in the local area.
- To support the delivery of the Newham Local Area SEND and Inclusion Strategy 2023-28 .

1.4g Sustainability Recommended Actions 2025/26

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

2 Demand for services

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

A range of factors will influence the level of childcare take up. Personal preferences, child needs, employment, work patterns, income, locality, family structure and support networks; information and knowledge of what is available all contribute to how many families use services. In 2024/25 the expansion of funded childcare for children under three and increased support for wraparound childcare for children of school age boosted participation in childcare. The key factors influencing the demand for services in Newham are considered in section 2 below.

2.1 Population Economic and social conditions

2.1a Population Profile

Newham has a young and ethnically diverse population, with over one-third of the population under 25 years old, 72% of our residents from Black, Asian and Ethnic Minority communities and over a hundred different languages spoken in the borough.⁵

The 2021 UK Census data recorded Newham's population as 351,100, which is a 14% increase from the 307,984 recorded in the census 2011. Ward and child population datasets used in this report come from Greater London Authority Housing Led-Borough Preferred Option (BPO) Projections for 2023.⁶

Child population in each year

The early year's child population at each age is shown below in table 1. There are 23,865 children that may require early years early education and childcare.

Table 1 Population number by age 0-4

Table 1 Population number by age 0-4 in 2024	
Age	Number of children
Under 1	5,272
Age 1	4,852
Age 2	4,947
Age 3	4,394
Age 4	4,400
Total 0-4	23,865

⁵ <https://www.newham.info/wp-content/uploads/2021/07/State-of-the-Borough-2021-1.pdf>

⁶ <https://data.london.gov.uk/dataset/housing-led-population-projections> Produced May 2024

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 45,329 children are aged between 5 and 14 years old. The total child estimate for 0-14 year olds is 69,194 in 2024. Newham is currently experiencing a decline in children attending primary school. This reduction has been predominately triggered by a falling birth rate.

Table 2 Population number by age 5-14 in 2024	
Age	Number of Children
Age 5	4,397
Age 6	4,381
Age 7	4,471
Age 8	4,502
Age 9	4,458
Age 10	4,566
Age 11	4,550
Age 12	4,654
Age 13	4,596
Age 14	4,754
Total 5-14	45,329

Under 5s Ward Analysis and Future Projections

Table 3 shows projected under 5 populations at ward level over the period 2024 to 2034. It should be noted that forecasts are not certainties, as information and future trends are subject to change. The child population analysis shown is against the new ward boundaries that were introduced in May 2022, these can be viewed in map 1.

Map 1

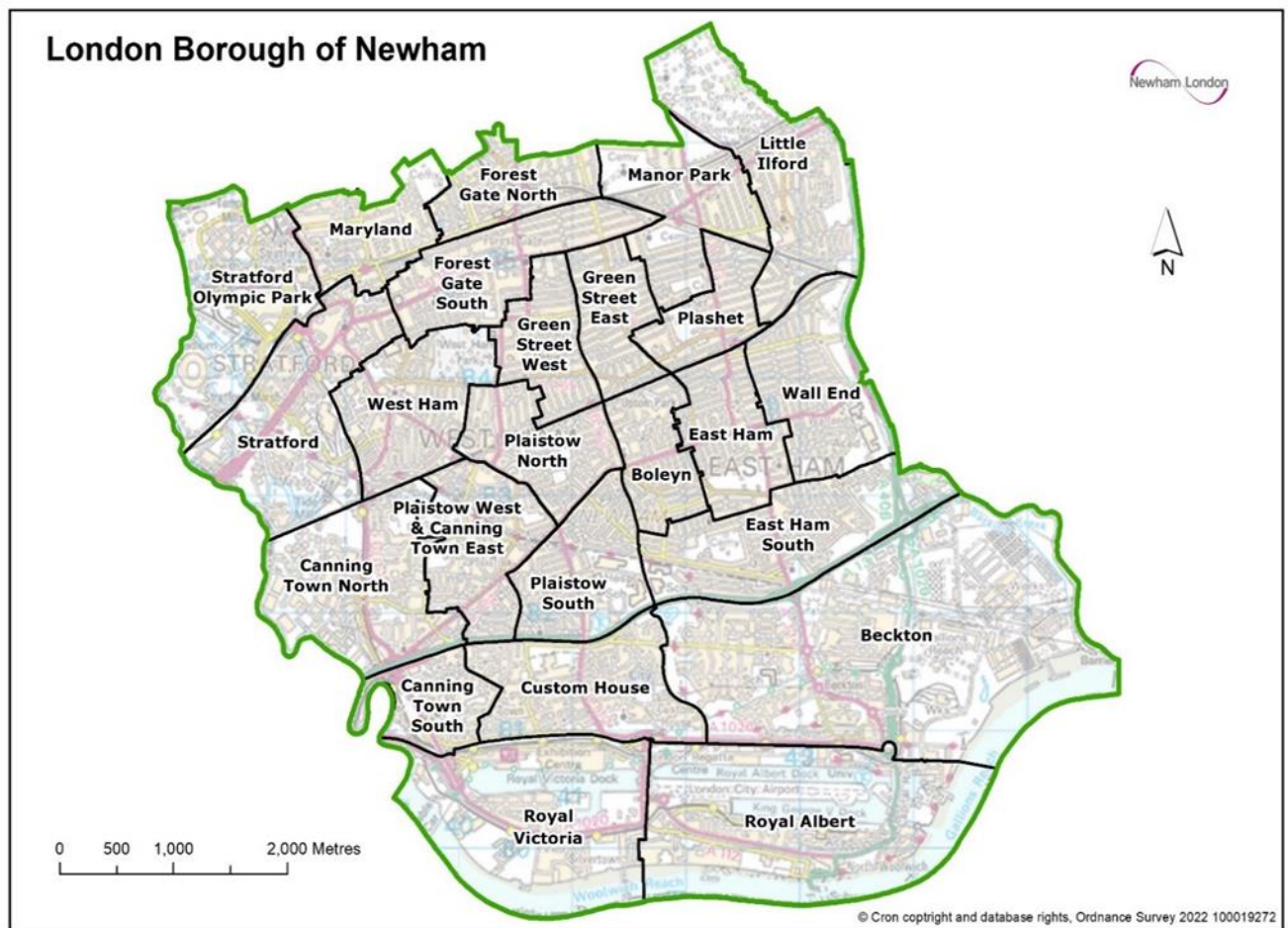


Table 3					
GLA population projections for Newham 0-4 Year Olds				Projected change	Projected change
Ward	2024	2029	2034	2029	2034
Beckton	947	1181	1717	234	771
Boleyn	1281	1211	1114	-70	-167
Canning Town North	579	927	942	347	363
Canning Town South	436	583	594	148	159
Custom House	1036	1086	1094	50	58
East Ham	1071	1249	1251	179	180
East Ham South	1148	1053	1025	-95	-124
Forest Gate North	775	709	682	-66	-93
Forest Gate South	1143	1120	1108	-23	-35
Green Street East	1452	1308	1227	-143	-225
Green Street West	1291	1188	1137	-103	-153
Little Ilford	1241	1220	1178	-21	-63
Manor Park	1124	1081	1068	-43	-56
Maryland	751	651	628	-100	-123
Plaistow North	1251	1164	1105	-87	-147
Plaistow South	798	764	745	-35	-54
Plaistow West & Canning Tow	1069	975	932	-94	-137
Plashet	826	748	706	-78	-119
Royal Albert	753	805	895	52	143
Royal Victoria	1302	1448	1466	147	165
Stratford	882	1366	1594	484	711
Stratford Olympic Park	799	931	857	132	58
Wall End	1063	971	939	-92	-124
West Ham	847	820	808	-27	-39
Grand Total	23865	24559	24812	694	947
% change against 2024		2.9	4.0		

The number of children aged between 0-4 is projected to increase by 2.9% by 2029 and by 4.0% by 2034. Over the next ten years the most significant increases are projected for the wards of Beckton (+771), Stratford (+711), and Canning Town North (+363). Where there are declines, these are less significant, with the largest declines predicted for Green Street East (-225) and Green Street West (-153).

5 – 14 Ward Analysis and Future Projections

Table 4 shows projected populations for 5-14 year olds at ward level over the period 2024 to 2034.

The number of 5-14 year olds in Newham is projected to decrease by -6.4% by 2029 and by -10.8% by 2034. Over the next ten years, increases in 5-14 children are expected in Stratford (+711), Royal Victoria (+457), Beckton (+409), and Canning Town North (+375). However these are more than offset by reductions across eighteen wards, with the largest falls being projected for East Ham South (-798), Wall End (-605), Plaistow West and Canning Town (-593) and Plaistow North (-539).

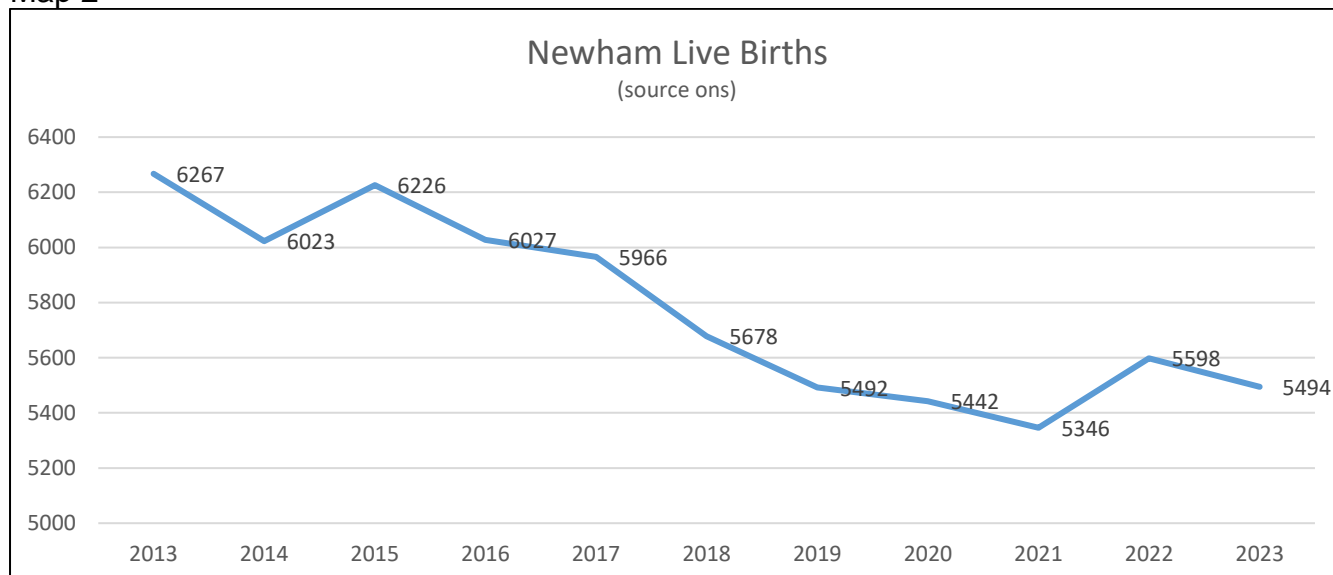
Table 4

GLA population projections for Newham 5 - 14 year olds				Projected change	Projected change
Ward	2024	2029	2034	2029	2034
Beckton	1931	1923	2341	-8	409
Boleyn	2129	1920	1755	-210	-374
Canning Town North	1215	1503	1590	288	375
Canning Town South	816	895	935	79	119
Custom House	2340	2130	1994	-210	-346
East Ham	2161	2072	2029	-89	-132
East Ham South	3027	2509	2229	-518	-798
Forest Gate North	1270	1146	1058	-124	-212
Forest Gate South	2208	1908	1729	-300	-479
Green Street East	2514	2303	2088	-211	-426
Green Street West	2037	1932	1737	-105	-300
Little Ilford	2719	2382	2190	-337	-529
Manor Park	2268	1979	1859	-289	-410
Maryland	1316	1200	1063	-116	-252
Plaistow North	2478	2198	1939	-281	-539
Plaistow South	1856	1539	1387	-317	-469
Plaistow West & Canning Town East	2243	1858	1650	-385	-593
Plashet	1545	1359	1182	-186	-363
Royal Albert	1218	1195	1197	-23	-21
Royal Victoria	1391	1771	1848	380	457
Stratford	1226	1631	1938	404	711
Stratford Olympic Park	1406	1682	1630	275	223
Wall End	2340	1947	1735	-393	-605
West Ham	1673	1466	1352	-207	-321
Grand Total	45329	42448	40455	-2881	-4874
% change against 2024		-6.4	-10.8		

Fertility and birth rate

In line with many Boroughs, there had been a rapid increase in births up to 2012. This trend then reversed, with births on a reducing trajectory nationally and locally. In the latest data available, live births in Newham resumed a downward trajectory, with live births down 104 (-1.9%) against 2022. The fertility rate in Newham of 1.8 remains higher than for England, which is 1.61%.⁷

Map 2



Population Mobility

Population churn is high in Newham. In the last available dataset 2019-20, 14.4% of the population migrated either in or out of the borough with other parts of the UK⁸. This is significantly higher than the 6.0% for all London Authorities. Additionally Newham continues to see high levels of international migration with an inflow of 11,443 and an outflow of 4,769 in 2019-20.

2.1b Prosperity and work

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

Employment

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

Table 5 shows that 73.2% of Newham resident adults were economically active in 2022/23, There were 70.7% in employment. This is lower than the in employment rate for either London (74.6%) or Great Britain (75.8%). For economically active women in

⁷ ONS Nomis Live Births in England and Wales Local Authority Local Area

⁸ Office for National Statistics Local Area Migration Indicators UK September 2021

Newham, the in employment rate was lower at 60.9%. The availability of affordable quality childcare is a barrier to work for women in particular.

Table 5

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

Median earnings for Newham residents

The median full-time weekly income for Newham residents in 2024 was £758, lower than the London weekly average of £853 but higher than the average for England and Wales of £728.⁹

2.1c Ethnic Diversity

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

⁹ Annual Survey of hours and earnings (ASHE) 2024

Table 6: Census 2021 Newham Population Ethnic groups

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

Language

The 2021 Census showed that 65.4% of Newham residents speak English as their main language. This is significantly lower than London at 78.4%, or England and Wales at 96.7%.¹⁰ Language barriers can lead to problems accessing services. There is a high number of languages spoken in Newham, with over 100 languages recorded.

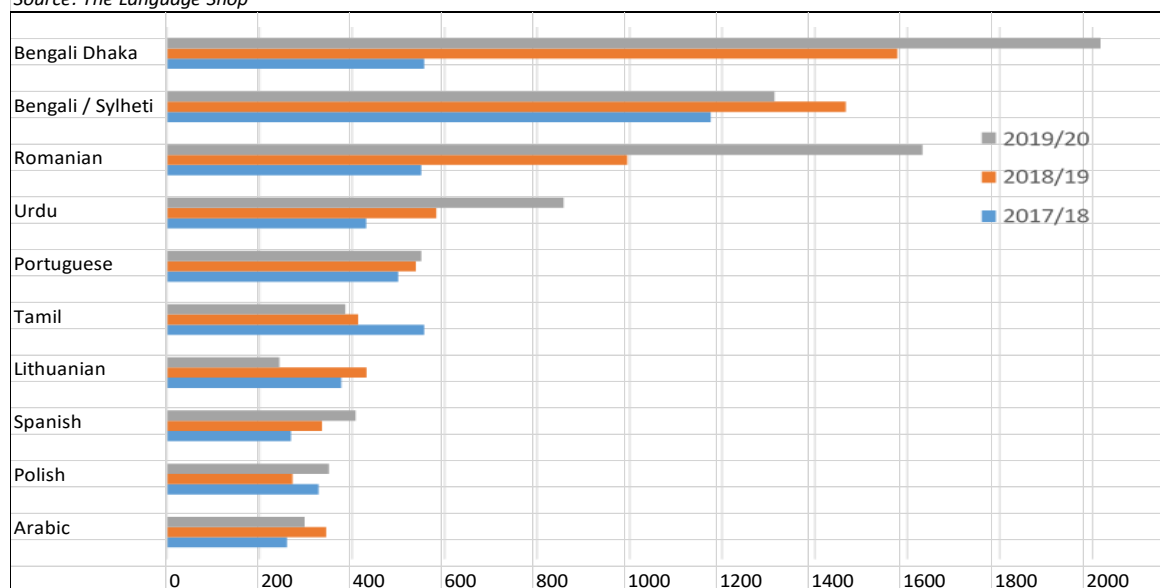
Figure 1 shows the top ten language support requests to the Newham Language Shop and shows a general increase in use of interpreting services..

¹⁰[https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/bulletins/languageenglandandwales/census2021#:~:text=Main%20points,-This%20page%20is&text=In%202021%2C%2091.1%25%20\(52.6,49.8%20million%2C%20in%202011\).](https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/bulletins/languageenglandandwales/census2021#:~:text=Main%20points,-This%20page%20is&text=In%202021%2C%2091.1%25%20(52.6,49.8%20million%2C%20in%202011).)

Figure 1

Top 10 Languages requested by LBN for interpretation and translation purposes

Source: The Language Shop



There is a rich diversity of languages spoken in Newham. In the 2011 Census Newham was the second most linguistically diverse London borough after Hillingdon, with 103 languages recorded.

2.1d Housing and Economic Regeneration

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

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

2.2 Demand implications - Expanded Funded Entitlements Initiative

An expansion of funded early education for working families with children under three is being implemented between April 2024 and September 2025. This is an expansion of the 30 hours scheme already available to working families with children aged three or four. New funded places are being made available in phases as follows:

- From April 2024 eligible working families with children aged two can get 15 hours

per week (570 hours over a year)

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

The number of participating families with children under three over the first two phases of implementation to date is shown in Table 7 below.

Table 7

Expanded Funded Entitlement Take Up 2024-5 (currently 15 hours)	Summer Term 2024	Autumn Term 2024	Spring Term 2025 (first headcount)
Working families with children 9m to 2	n/a	716	718
Working families with 2 year olds	695	892	948
Total	695	1,608	1,666

Take up of the new entitlement for working parents with children aged 2 has been in place for three terms, with take up increasing by 36% (253 children) over this time. We expect take up to continue to grow as awareness and availability increases and as the hours available doubles to thirty. Our current estimate is that take up will ultimately settle in the region of 1,300 children accessing 30 hours.

Families with children under 2 have been able to access places for two terms to date. The highest take up so far is 718. Our assessment is that take up will ultimately settle at around 1,200. We will continue to monitor take up and adjust our planning assumptions as the expansion moves forward. New places will need to be created for under 2s to meet demand. The need for additional places for this scheme is further explored at 3.11d.

Our parents' survey indicates that most eligible working families will be looking for year round provision, but for around one third of families a term time offer suits their needs. There is also demand for places across all provider types including childminders, PVI group care settings and schools where places are offered.

Further work is planned to monitor demand and prepare strategies to support place creation where needed, particularly in relation to the final phase of implementation.

2.3 Demand implications Wraparound Childcare initiative primary school aged pupils

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

Unlike the expanded funded entitlements, wraparound places are expected to be paid for by

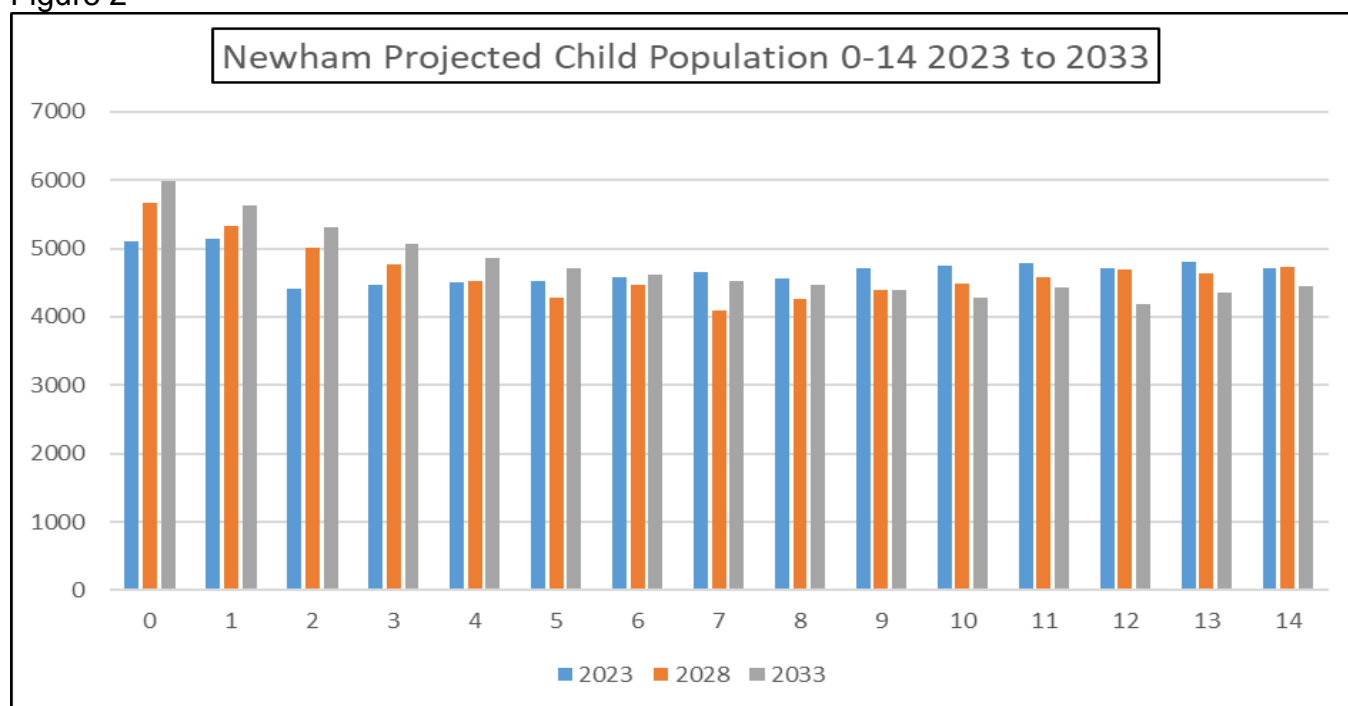
parents and carers, so demand is not being lifted by the offer of funded childcare. Nevertheless, the early evidence is that demand for wraparound is increasing. This is likely to be the result of more childcare that fits fully around the work day and also the increased availability of wraparound childcare on school sites. Progress of the wraparound scheme in Newham is further explored at 4.2.

The availability of good quality, reliable wraparound care, together with improved coordination and marketing of services and improved awareness of the help the parents can get with the costs of childcare, is expected to stimulate demand further as more places are created over the year ahead.

2.4 Child age profile and geographical distribution

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

Figure 2

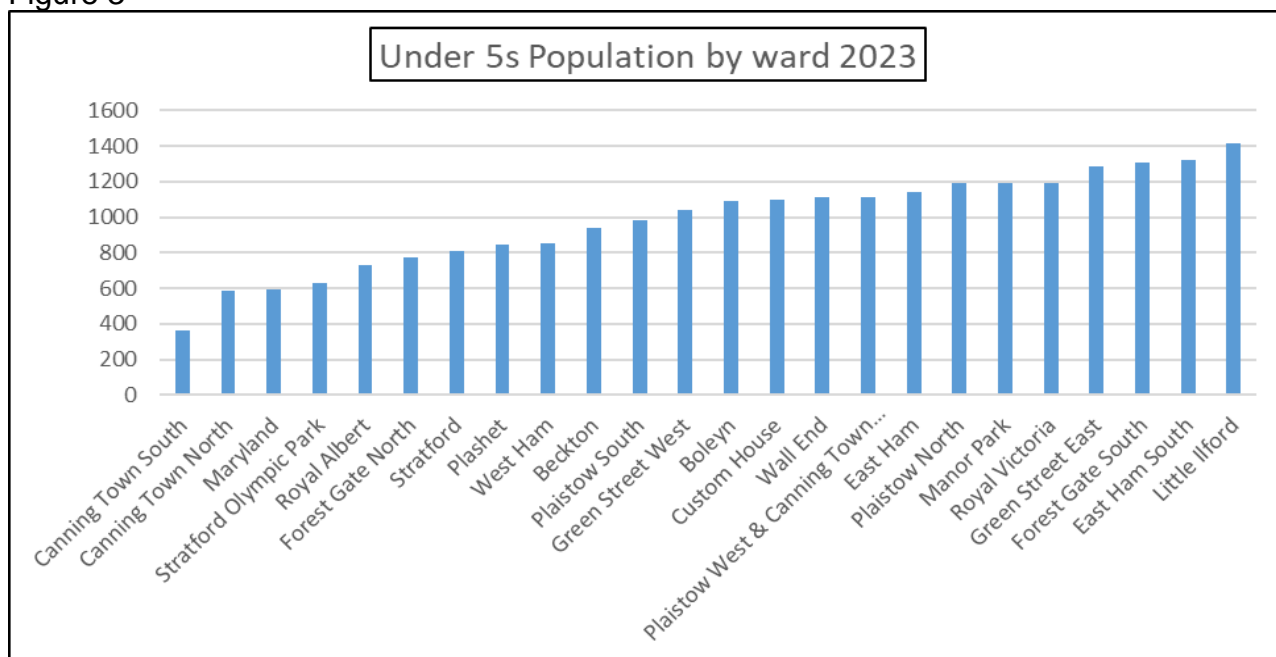


The borough is made up of 24 wards and sufficiency data that follows in this report is supplied at ward level.

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

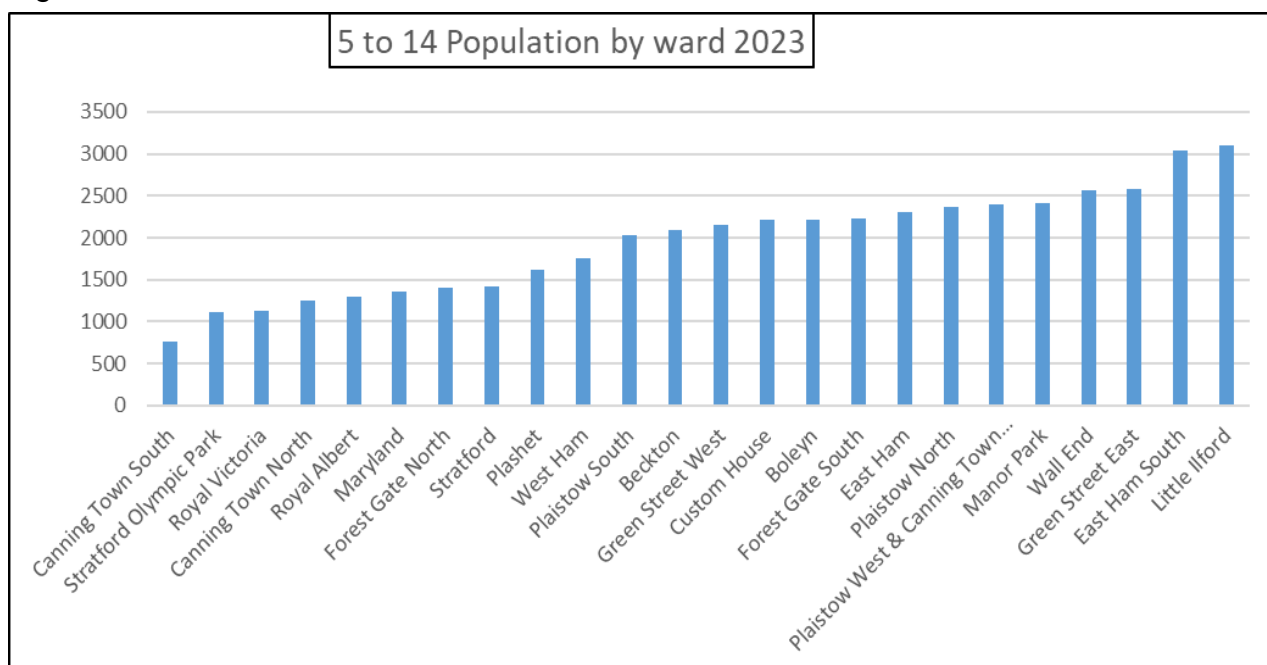
Redevelopment is projected to see significant increases in 0-4 children in Stratford, Beckton, Royal Victoria and Canning Town North over the next ten years.

Figure 3



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

Figure 4



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

Estimating the numbers of Newham children with SEND.

Children and young people with SEND are entitled to support with childcare up to the age of 18. The number of children with an Education, Health and Care (EHC) plan in our local authority, as reported to the Department for Education in January 2024 is shown in table 8 below. The total number of children with an EHC plan increased by 5.5%% to 2,594.

There has been a big jump in the number of children and young people with EHC plans over the last five years, with the number of children with EHC plans more than doubling in Newham since 2020, with increases across the 0-19 age ranges, but particularly in the 0-5 and 5 to 10 cohorts. This is mainly due to the establishment of EHC processes with earlier opportunities for diagnosis, reflecting SEND Code of Practice reforms.

In England the number of children and young people with EHC plans also increased by a significant 11.4% in 2024, continuing a national trend of increased EHC plans being issued.

Table 8

Children and young people with EHC Plans in Newham					
Age	Number of children 2024	Number of children 2023	Number of children 2022	Number of children 2021	Number of children 2020
Under age 5	104	110	76	63	37
Aged 5 to 10	1103	1016	700	521	419
Aged 11 to 15	904	856	664	553	424
Aged 16 to 19	483	477	51	51	334
TOTAL	2594	2459	1491	1188	1214

2.6 Parents views on the provision of childcare

Information on parents' views and access to services has been included from a survey of Newham parents, which was conducted in autumn 2024 and received 593 responses.¹¹ This is supplemented by findings from the most recent DfE national parent survey July 2024.¹² Where parents' views have been captured and relate to the expansion of funded childcare for children under three, these have been detailed at 2.2.

2.6a Finding out about Childcare

In Newham, parents were asked what method they used to find out about childcare. The most common methods identified are shown in figure 5. Personal

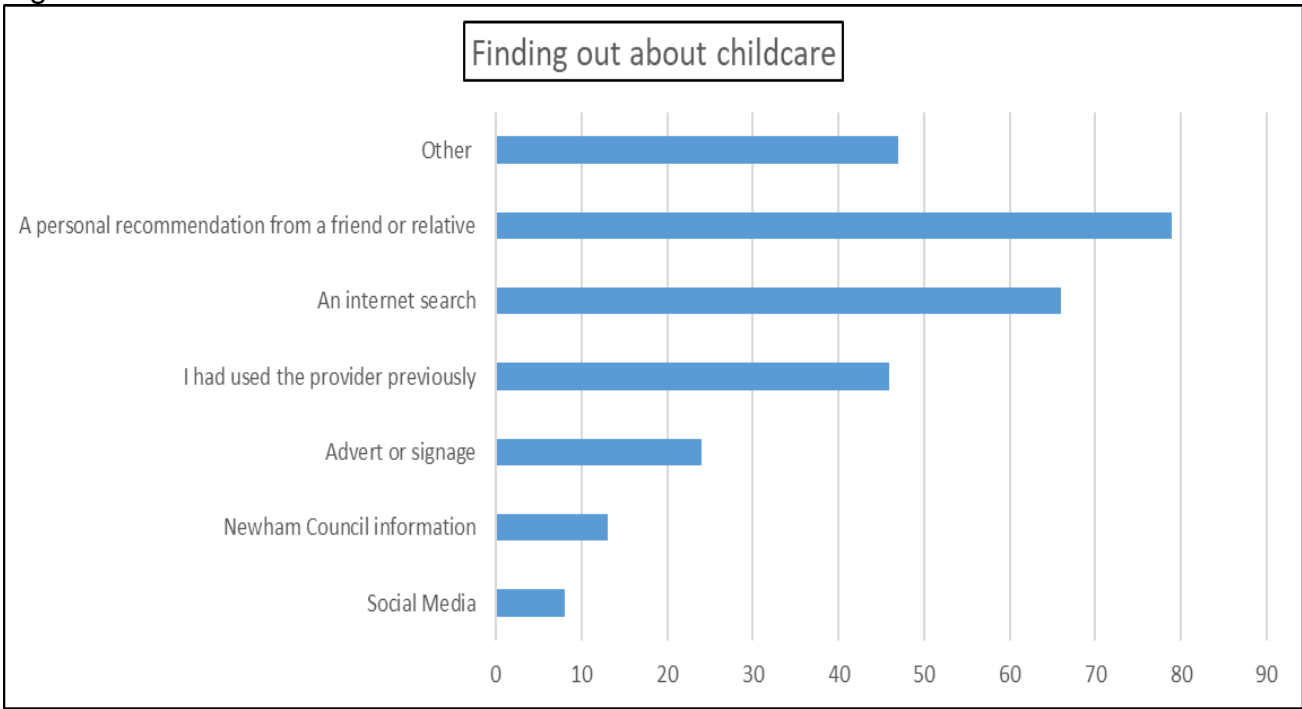
¹¹ Newham on line parent survey conducted September – December 2024

¹² <https://explore-education-statistics.service.gov.uk/find-statistics/childcare-and-early-years-survey-of-parents>

recommendations remain very important for parents looking to place their child with a setting and the views of other parents was relied on by many as a trusted source of information about childcare. The internet and the use of social media is often an important first step for parents looking to identify their options. Previous experience of a childcare provider is also an important consideration. Schools were the most frequent identified under “other” ways of finding out about childcare.

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

Figure 5



2.6b Awareness of help with Childcare Costs

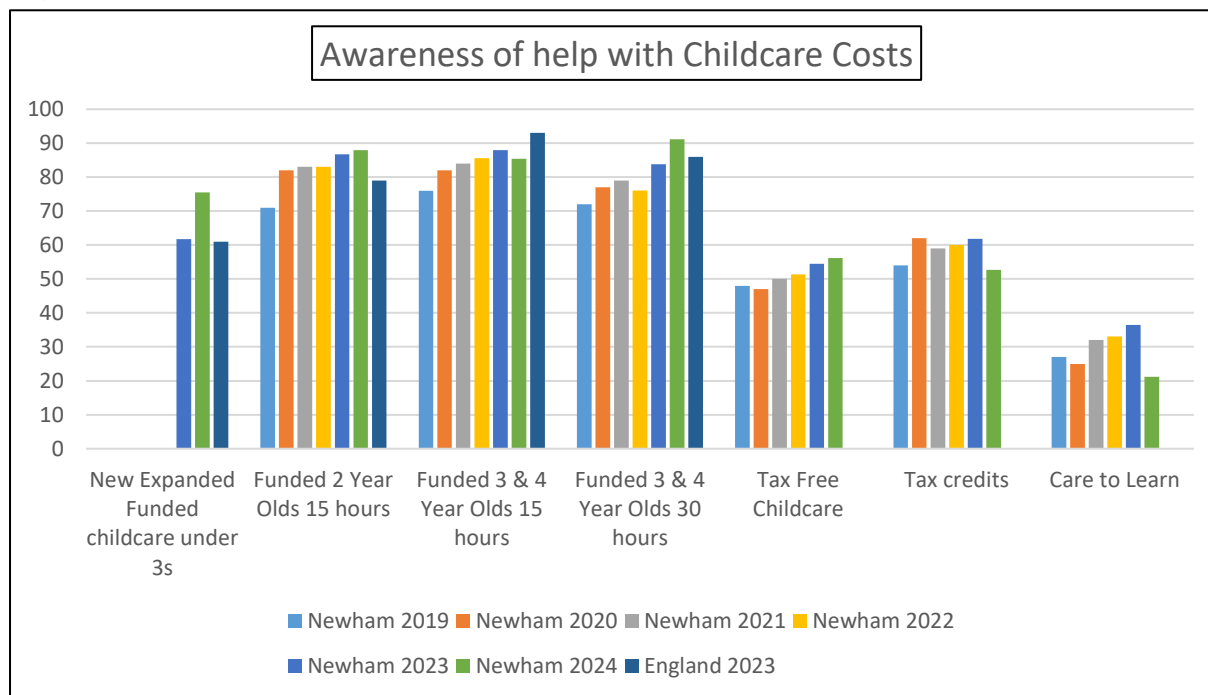
Recent parent surveys carried out in Newham have shown an improving level of awareness of the range of financial help available to help with meeting childcare costs. The Local Authority has put in a range of initiatives to raise awareness. The latest Newham parent survey asked parents about their awareness of specific free and subsidised childcare schemes and the findings show that awareness continues to improve overall as is demonstrated in Figure 6.

Survey results indicate an improved awareness of all schemes aimed at working parents,. Awareness is higher in Newham than reported nationally for all the funded entitlement schemes, with the exception of the universal entitlement for three and four year olds. Although improved, awareness of the expanded funded childcare offer for children under three, was lower than for the other entitlements at the time of the survey, in Autumn 2024. The Local Authority has a marketing plan in place to promote the awareness of this new scheme.

Awareness remains lower with regard to childcare subsidy schemes, with 53% being

aware of childcare element of universal tax credits, 56% were aware of tax-free childcare and 21% aware of the care to learn programme. In March 2022, around three quarters of the 1.3 million families eligible nationally for tax-free childcare were not claiming it. It should be borne in mind that parents completing the Newham survey were self-selecting and parents where English language is not strong may be less likely to have participated in the survey.

Figure 6



2.6c Reasons for choosing childcare

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

Factors in choosing childcare in Newham in order of importance

- Location (close to home or work)
- The hours and weeks available available suit me
- Cost/Affordability
- The provider has a good reputation / Ofsted grade
- The provider can be flexible in changing the hours I use
- The provider clearly explains their services and the activities and benefits for my child
- My child's siblings or friends attend the same provider
- My child's special need is supported
- I know the provider

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

There are different priorities reported between parents who choose various 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 for their child to mix is important.

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

2.6d Use of childcare

Nationally, in 2023, formal childcare was used by almost two thirds (63%) of children aged 0 to 4 years, which is in line with 62% in 2022. This is compared to around a third (32%) of children aged 5 to 14.

In 2023, 66% of working mothers of 0 to 4 year olds said that having reliable childcare helped them to work, a rise from 60% in 2022. The proportion fell to 30% among those in families with children aged 5 to 14 years only, in line with 2022, at 29%.

In the Newham parent survey of autumn 2024, 50% of responders with children 0-14 had used childcare in the last 12 months, the same as reported in 2022.

Informal childcare remains 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. Those using informal childcare equated to 28% of responders in 2024, similar to the 32% recorded in 2023. This change, which started in the pandemic, seems to be continuing and is likely to be the result of changes in working patterns and cost of living pressures on families.

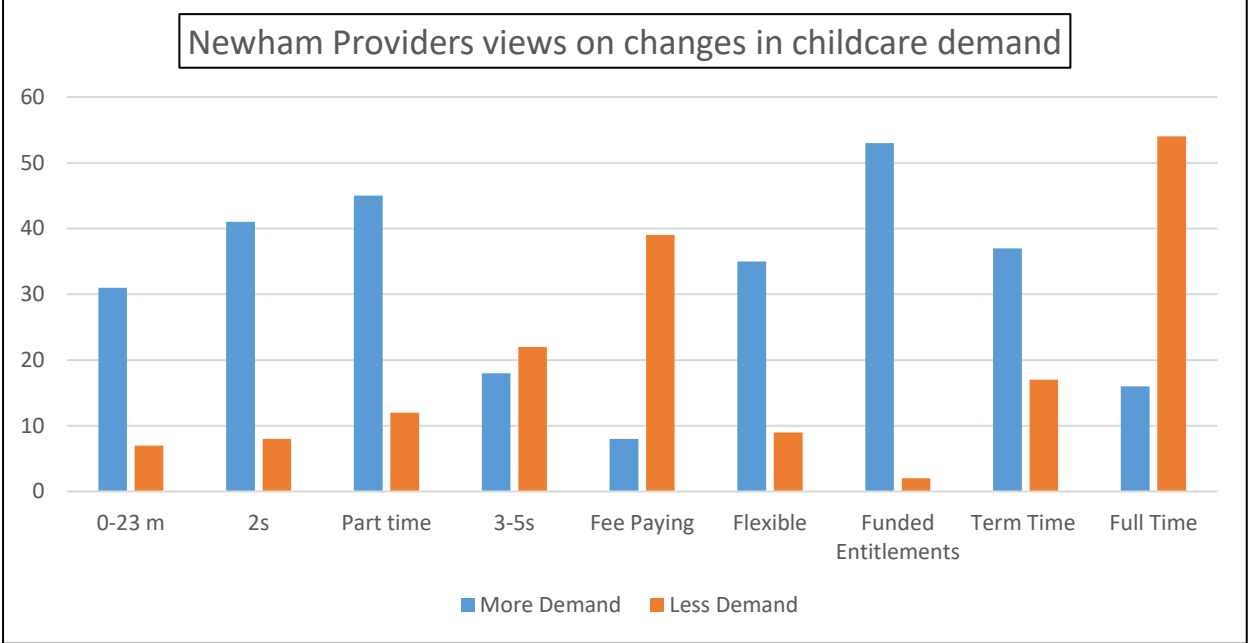
Newham parents were asked if they were able to access early year's registered good or outstanding childcare. The vast majority of responding parents indicated that they had been able to access good or outstanding provision (90%), and this is up from 2023 (85%). A lower proportion of parents recorded that they had been able to access Ofsted registered out of school care services (68%), but this is also up from the 62% recorded in 2023.

Over three quarters of responding parents said that they were able to access the hours that fully met their needs from their childcare provider (76%), and this is up from the 70% reported in 2023. Nearly seven in ten of responding parents said that they had been able to receive childcare services from their preferred provider but this was a decline (65% down from 68% in 2023). With regard to affordability, less than half of parents said they had been able to access childcare priced within their budget (48%), the same as reported in the CSA 2023), meaning that for a majority of parents affordability was an issue.

Over eight in ten (82%) of responders to Newham's survey 2024 say they are satisfied with their childcare arrangements overall. This is significantly higher than the 68% recorded in the CSA survey 2023.

Newham childcare providers were surveyed about changes in childcare demand in autumn 2024, compared to autumn 2023. Figure 7 shows that for many providers, there is more demand for part time places, for more flexible hours, children under 3 and funded early education. Many providers have seen a drop in demand for full time places and fee paying hours. This continues a trend identified in last year’s sufficiency report.

Figure 7



2.6e Unmet Childcare Needs

In Newham’s parent survey 2024, just under a quarter of respondents said they had unmet childcare needs (23%), the same as reported in 2023. Respondents have expressed a variety of unmet childcare needs, with common themes including the need for more flexible hours to accommodate work schedules, especially for parents working in education or needing care beyond typical school hours. Many agree that the location of the provider should be close to work or home and that affordability is a significant factor.

A number of responses highlight the challenges faced by parents of children with special educational needs and disabilities (SEND), some indicating a lack of suitable provision and support for these children. Parents are seeking more inclusive options that do not come at an additional cost.

Overall, respondents are looking for childcare that is affordable, conveniently located, offers flexible hours, and provides quality care and activities. There is a desire for better support for SEND children and more diverse after-school and holiday club options to meet the varied needs of families in Newham.

3 Supply of services for under-fives

3.1 Types of registered provision

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

3.2 Overall number of places available for under fives

Table 9

Number of registered places available for under 5s in Newham 2024 (Early Years Register)			
Type of Registered Provider	Places August 2023	Places August 2024	% Change
Childminder	633	551	-13.0
Childcare on domestic premises	41	41	0.0
Daycare and Pre-Schools on non domestic premises	5588	5667	1.4
Total	6262	6259	0.0

Source: <https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-august-2024>

The total registered places available for under-fives in August 2024 stands at 6,259, as shown in Table 9. A continuation of a decline in childminder places is counteracted by an increase in daycare and pre-school places. Overall places are almost exactly the same as in 2023.

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

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

Table 10 Funded Part Time Places in Schools and Nursery Schools 2024 (Census 2024)		
Type of Provider	Number of providers	Number of places
Nursery units in primary schools	68	6,113
Maintained nursery schools	7	1,070
Total	75	7,183

Overall places across all providers, including both full time and part time, now total 13,442.

3.3 Number of places available in each ward for under fives

3.3a Group Care places available in each ward

Figure 8

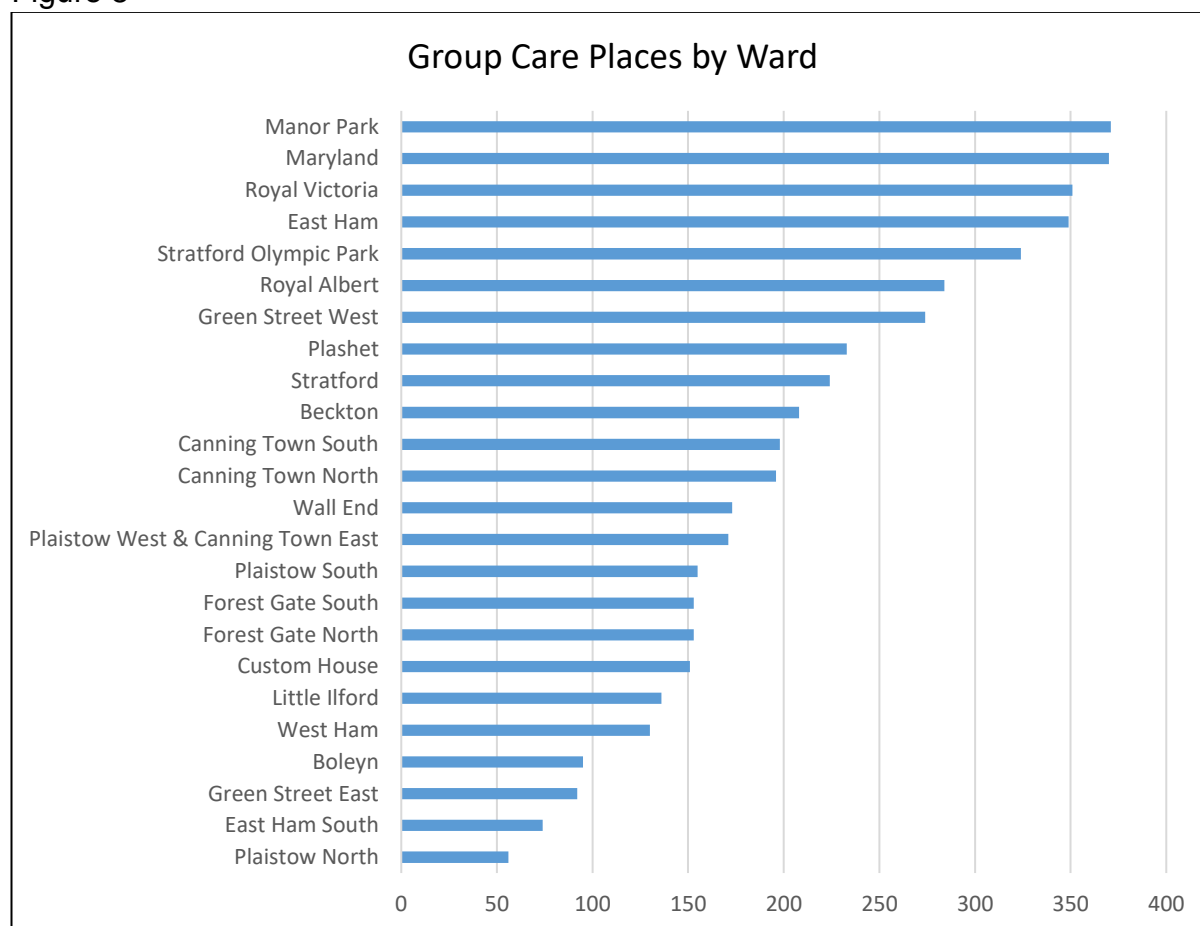


Figure 8 shows the distribution of group care places in the borough. The lowest numbers of places are in the wards of Plaistow North (56), East Ham South (74), Green Street East (92), Boleyn (95) and West Ham (130). Manor Park (371), Maryland (370), Royal Vicotira (351), East Ham (349) and Stratford Olympic Park (324) have significantly more places than the borough average of 205 places per ward.

3.3b Childminder places available in each ward

Figure 9

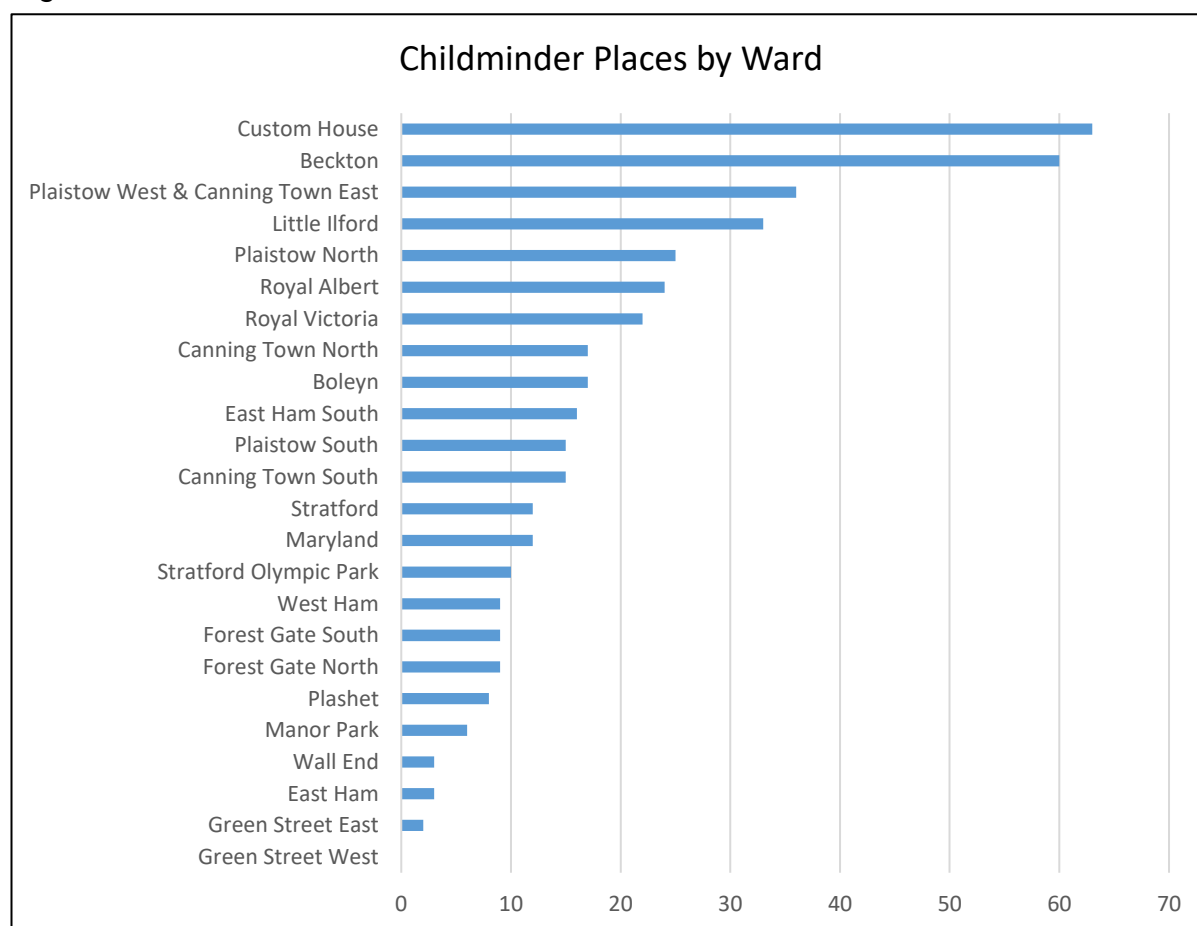


Figure 9 shows the distribution of childminder places. There are 10 or less places available in Green Street West (0), Green Street East (2), East Ham (3), Wall End (3) and Manor Park (6). Custom House has more places than any other ward at 63, with Beckton (60) and Plaistow, West Canning Town (36) and Little Ilford (33) also being well above the borough average per ward of 18.

Figure 10

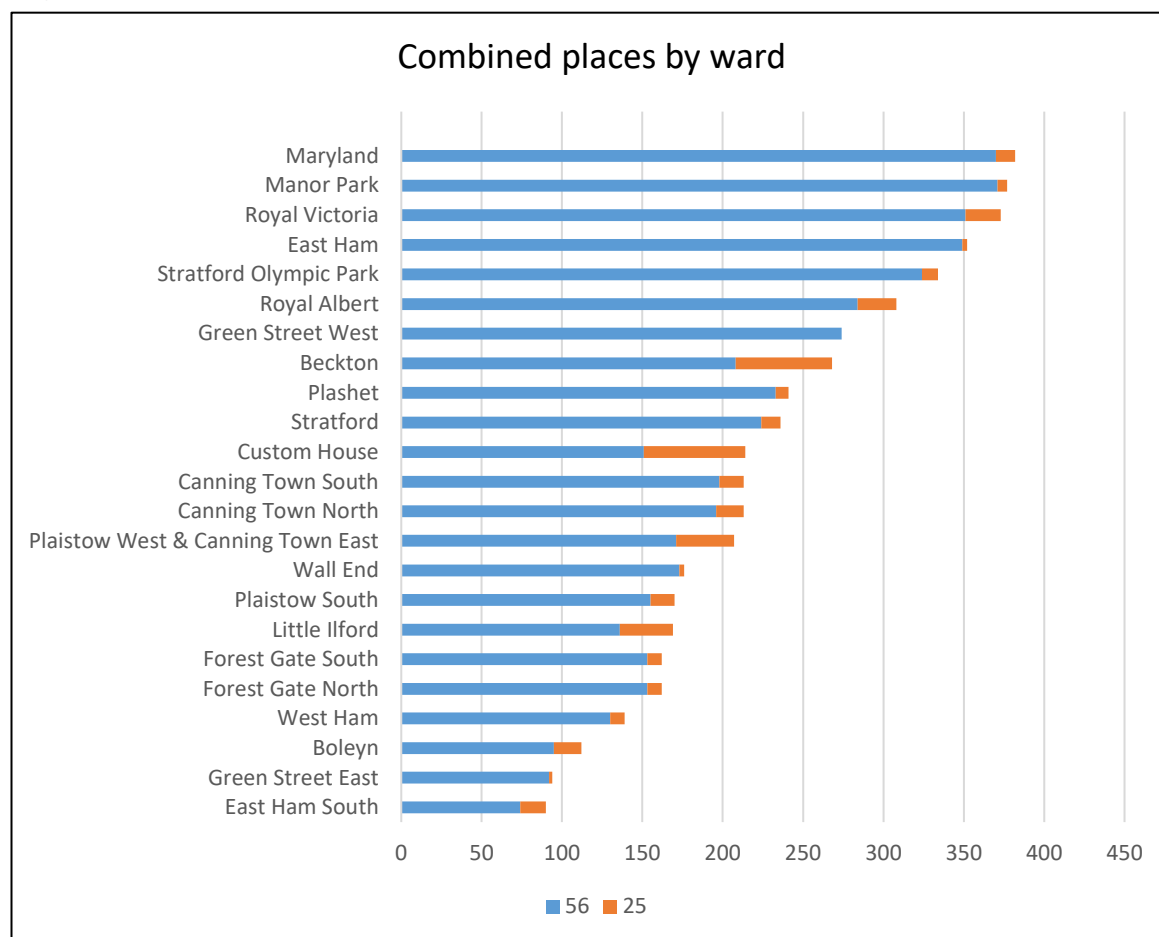


Figure 10 shows the overall distribution of under-five places across the borough. The wards with 150 or less places are Plaistow North (81), East Ham South (90), Green Street East (94) Boleyn (112) and West Ham (139). Maryland has the highest number of places (382), compared to the ward average of 223.

3.4 Number of places available per child in each ward

3.4a Overall place availability per child in each ward

Figure 11

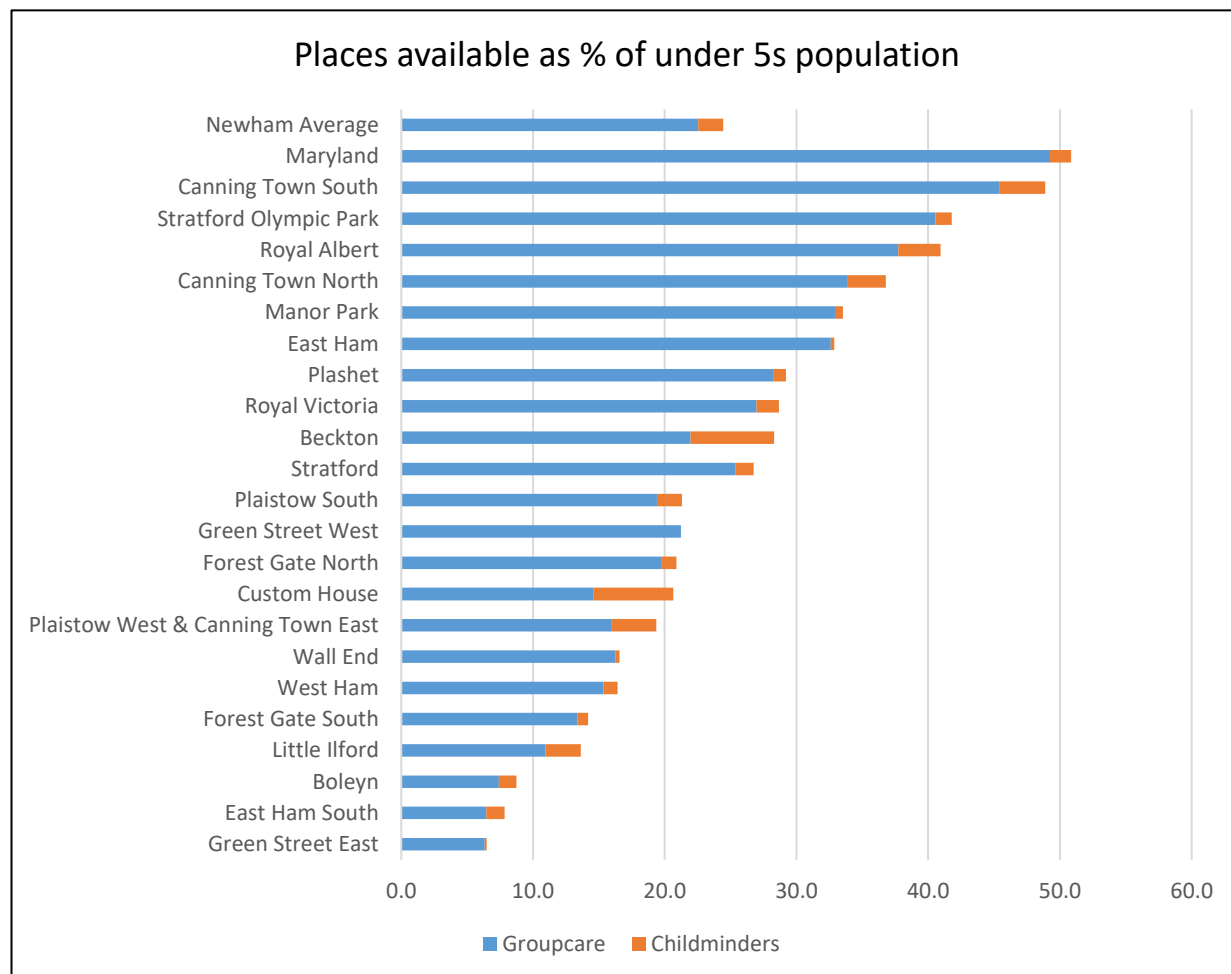


Figure 11 shows the number of all places as a percentage of the resident under-five population in each ward. The ward distribution of all places shown above translates to an average of one full time equivalent place for every 4.1 children in the age range across the borough, or put another way this equates to 24% of under-five population overall. It should be noted that many children access part time places in early years so that, for example, one full time equivalent place may be occupied by as many as three children attending on a part time basis.

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

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

Table 11 Under 5s Full Time Places		
Rank	Wards are ranked by total registered places per resident child in each ward - rank 1 has the least places, 24 the most	
1	Plaistow North	1 full time place for every 16 resident children
2	Green Street East	1 full time place for every 16 resident children
3	East Ham South	1 full time place for every 13 resident children
4	Boleyn	1 full time place for every 12 resident children
5	Little Ilford	1 full time place for every 8 resident children
6	Forest Gate South	1 full time place for every 8 resident children
7	Green Street West	1 full time place for every 7 resident children
8	West Ham	1 full time place for every 7 resident children
9	Wall End	1 full time place for every 7 resident children
10	Plaistow West & Canning Town	1 full time place for every 6 resident children
11	Custom House	1 full time place for every 5 resident children
12	Forest Gate North	1 full time place for every 5 resident children
13	Plaistow South	1 full time place for every 5 resident children
14	Stratford	1 full time place for every 4 resident children
15	Beckton	1 full time place for every 4 resident children
16	Royal Victoria	1 full time place for every 4 resident children
17	Plashet	1 full time place for every 4 resident children
18	East Ham	1 full time place for every 4 resident children
19	Manor Park	1 full time place for every 3 resident children
20	Canning Town North	1 full time place for every 3 resident children
21	Royal Albert	1 full time place for every 3 resident children
22	Stratford Olympic Park	1 full time place for every 3 resident children
23	Canning Town South	1 full time place for every 3 resident children
24	Maryland	1 full time place for every 2 resident children
	Newham Average	1 full time place for every 4.1 resident children

Some wards with lower places per child resident are next to others that have high numbers, which can then serve their population needs. For example, Forest Gate North (ranked 12 above) has boundaries with other better served wards of Maryland (ranked 24), Manor Park (ranked 19), as well as Forest Gate South (ranked 6).

On the other hand, Plashet (ranked 17 above), has boundaries with worse served wards of Green Street East (ranked 2), Boleyn (4), Little Ilford (5), Wall End (8), as well as Manor Park (19).

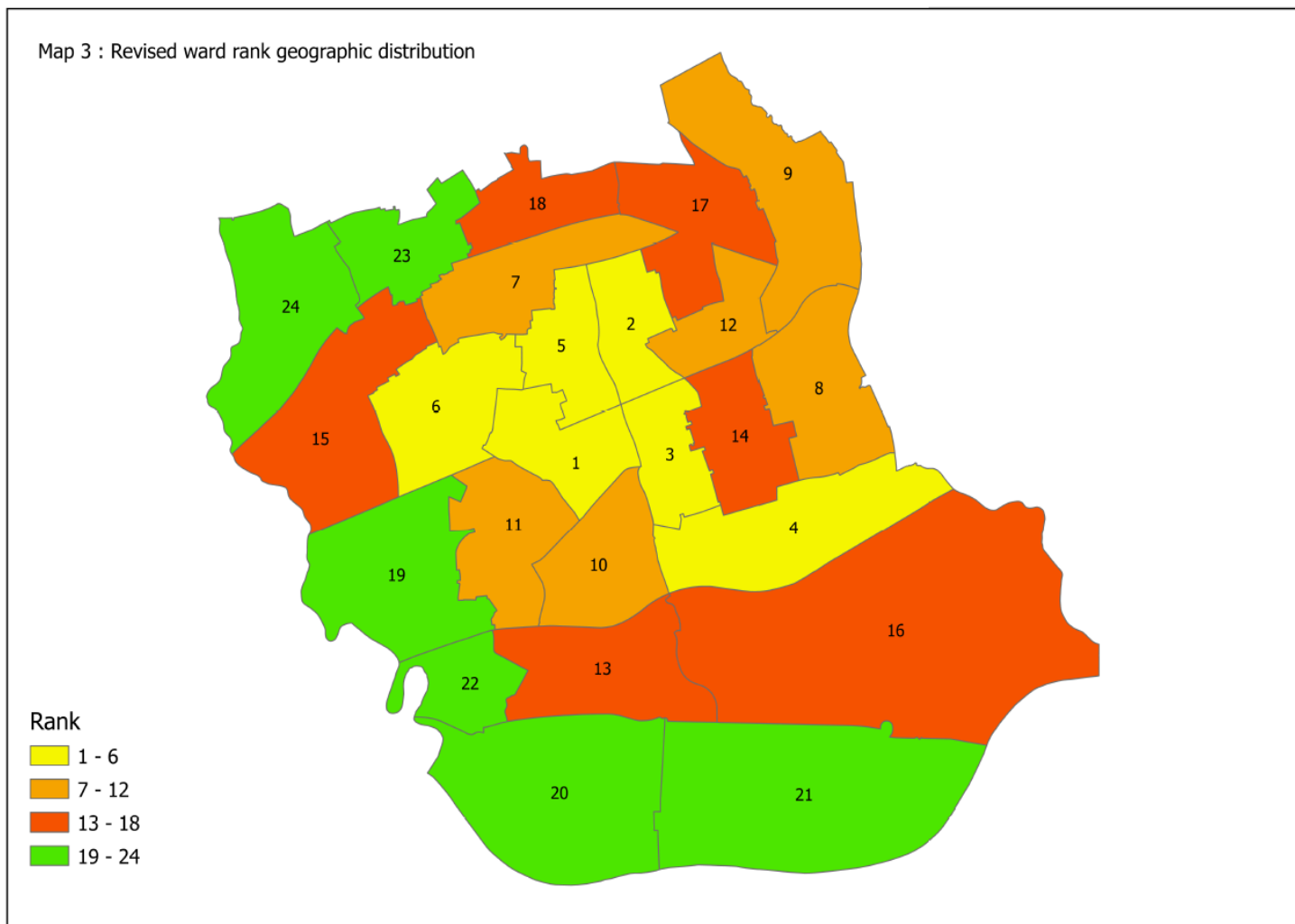
A weighted analysis which reflects equally both the places per resident population in a ward and those of other wards with an adjoining boundary produces a slightly different ward ranking. However, the majority of those wards with least provision per child remain largely clustered in the centre of the borough. The biggest movers using this analysis are the improving Forest Gate North (improving from 12 to 18) and the declining Plashet (deteriorating from a rank of 17 to 12). The wards with the least places per resident using this analysis are Plaistow North, Green Street East, Boleyn, East Ham South and Green Street West. This revised ranking is set out in Table 12 with the geographical distribution shown in Map 3.

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

Table 12 Under 5s Adjusted Ward Rank 2024	
Wards are ranked to reflect places per child in resident ward and in adjoining wards	
1	Plaistow North
2	Green Street East
3	Boleyn
4	East Ham South
5	Green Street West
6	West Ham
7	Forest Gate South
8	Wall End
9	Little Ilford
10	Plaistow South
11	Plaistow West & Canning Town East
12	Plashet
13	Custom House
14	East Ham
15	Stratford
16	Beckton
17	Manor Park
18	Forest Gate North
19	Canning Town North
20	Royal Victoria
21	Royal Albert
22	Canning Town South
23	Maryland
24	Stratford Olympic Park

Map 3 Showing Adjusted Ward Rank Childcare Places for Children Under Five

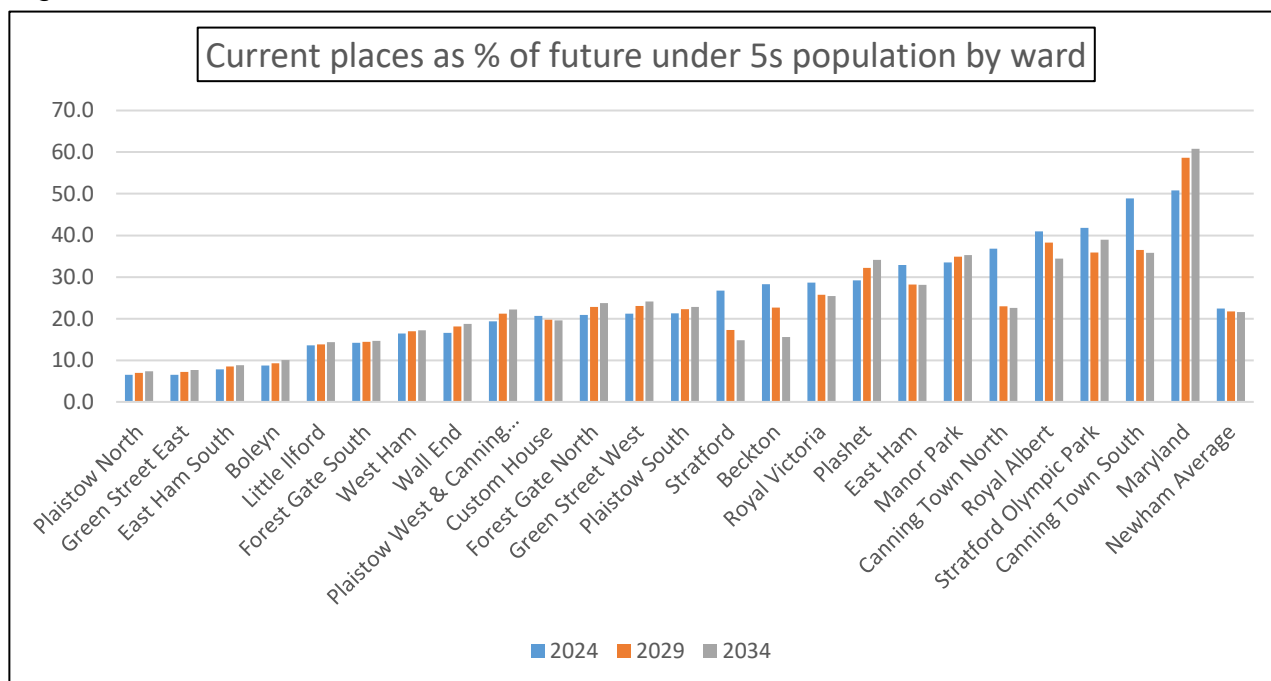
Wards are ranked to reflect places per child in resident ward and in adjoining wards (1 being worst, 24 being best)



3.5 Future Child Population Projections

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

Figure 12



Overall Newham's under-fives population is predicted to see an increase of 4% by 2034. Using ward level population projections the wards with the least places per resident child in 2034 will remain as Plaistow North, Green Street East, East Ham South and Boleyn. The biggest change in place availability relate to Canning Town North, which reduces the places available per resident child from the current 37% to 23% by 2034, Canning Town South, which reduces places available to resident child from 49% to 36% and Beckton which reduces from 28% to 16% by 2034. Maryland is predicted to have falling child population and on this basis would increase the number of places available per resident child in the ward from the current 51% to 61% by 2034, assuming the number of childcare places remained the same.

3.6 Childcare Setting Occupancy levels in Newham

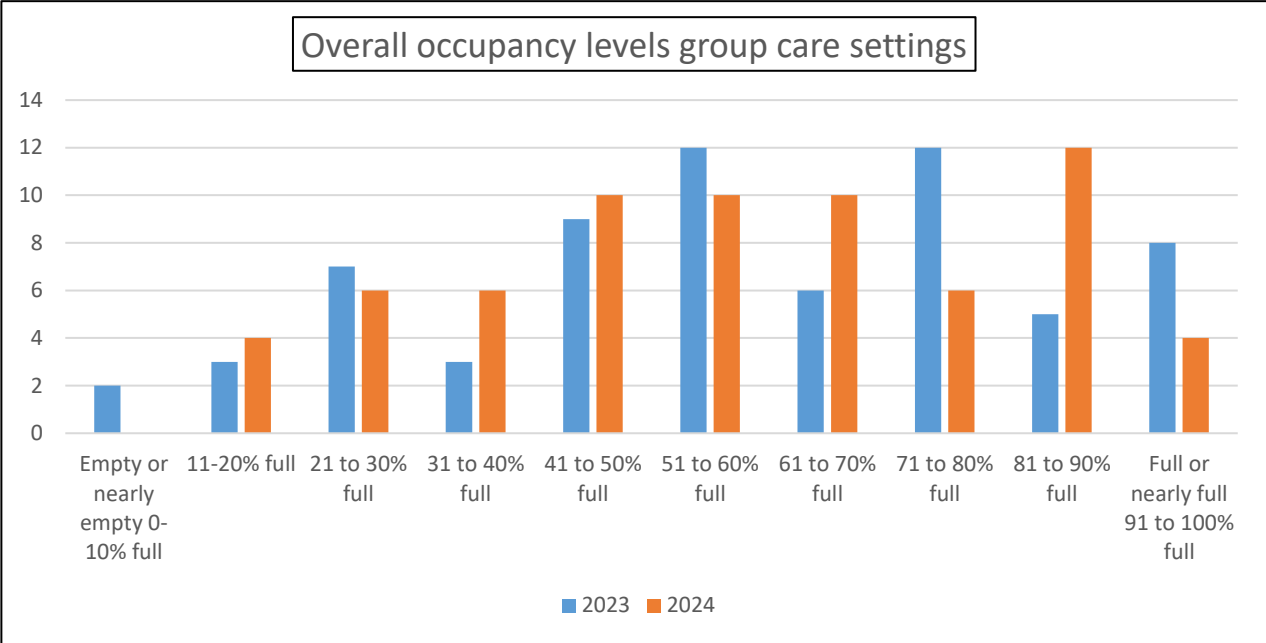
Group care providers and childminders were asked about overall occupancy levels in autumn 2023 and autumn 2024. Occupancy is a key driver in supporting sustainability. Occupancy is a major factor driving unit costs; as occupancy increases, fixed costs such as rent, rates, utilities and management time are spread across more children, thus lowering the cost per hour delivered.

3.6a Group care place occupancy

There is a wide range of occupancy levels as illustrated in figure 13. Providers reported an average occupancy of 58% in a survey conducted in autumn 2024. This is the same as

reported for Autumn 2023 overall. There is a wide range of occupancy levels reported ranging from 11-20% full to 90-100% full.

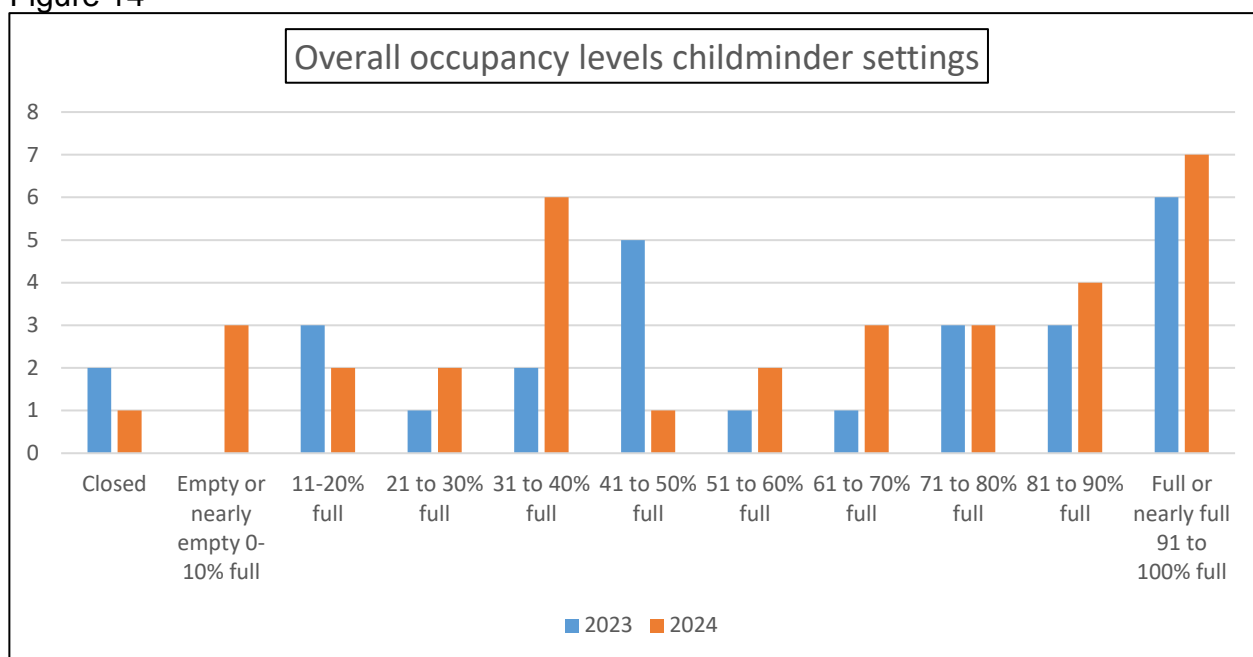
Figure 13



3.6b Childminder place occupancy

The average occupancy of childminder survey responders in autumn 2024 was 55%, with a similar 57% reported for autumn 2023. There is a wide range of occupancy levels reported but overall occupancy for childminders has improved compared to the findings previous childcare sufficiency assessments, which last reported an average occupancy rate of 37%. This may, in part, be a reflection of increased demand resulting from the expansion of funded early education for children under 3 years old.

Figure 14



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

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

Where needs are identified at birth, Health professionals have access to the early notification process so they can inform the LA and support can be provided for the child and family and between April 2023 and March 2024, 1,636 notifications were received, up from 1,324 in 22/23. This is a continuing upward trajectory.

Where needs are identified whilst a child is in an early education setting (private voluntary and independent nurseries (PVI), child minders (CM) or early years in schools, the setting will also use the early notification process. The SEND code of Practice (DfE, 2015:89) requires the LA to support early year's 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 2023/24 only 277 notification were recieved from education, down from 639 notifications in the previous year. This is attributed to a decline in notifications from the schools sector. Where children attend a PVI or CM setting, they have access to the Area SENCO team who will develop teaching strategies and guide the setting through the process to access additional funding. In 2023/24, 252 referrals were made into the area SENCO team following an EN, an increase of 1 from 22/23. In addition 354 children were supported to find a nursery by the area SENCO team, following 2 year old discretionary funding being provided. This is up from 206 in the previous year. . In total 480 children received funding from the SEND inclusion fund over the course of the financial year. he targeted interventions provided by the setting are recorded on the Early Years support plan (EYSP) and the costed provision map details how funding requested

will be spent. This includes the 104 assessment places commissioned via the maintained nursery schools. The nursery are required to identify children who require an EHCP and commence the statutory needs assessment process. The conversion rate is usually 10% of children moving from an assessment place to a statutory plan.

In 2023/24 91 children were referred into CNDS, up from 66 in the previous year, 400 in LCIS down from 416 in the previous year and 406 into MENCAP. the remainder being referred into other services.

3.8 Quality of early education and childcare in Newham

Ofsted inspection grades

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

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

The Education Inspection Framework

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

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

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

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

The Local Authority Quality Improvement team has been responsive to the challenges

around maintaining quality where there is an acknowledged national issue around workforce recruitment and retention in the early year's sector. Leadership training is provided to support managers, and there is also a recruitment and retention strategy in place.

New providers may still be awaiting their first full inspection and are inspected within 30 months of opening, but receive full support from our Quality Improvement team as part of our statutory responsibility in order to ensure they meet Ofsted requirements. These providers are excluded from our Ofsted data.

Table 13 shows a summary of early years Ofsted inspections grades in Newham as at June 2024. The number of settings that have yet to receive their first inspection remains relatively high. This high level of inexperienced providers, likely to need support, is a potential risk to future quality, which the Local Authority has identified and is successfully taking steps to mitigate by increasing capacity.

Table 13

Summary of early years Ofsted inspections grades in Newham as at June 2024¹³

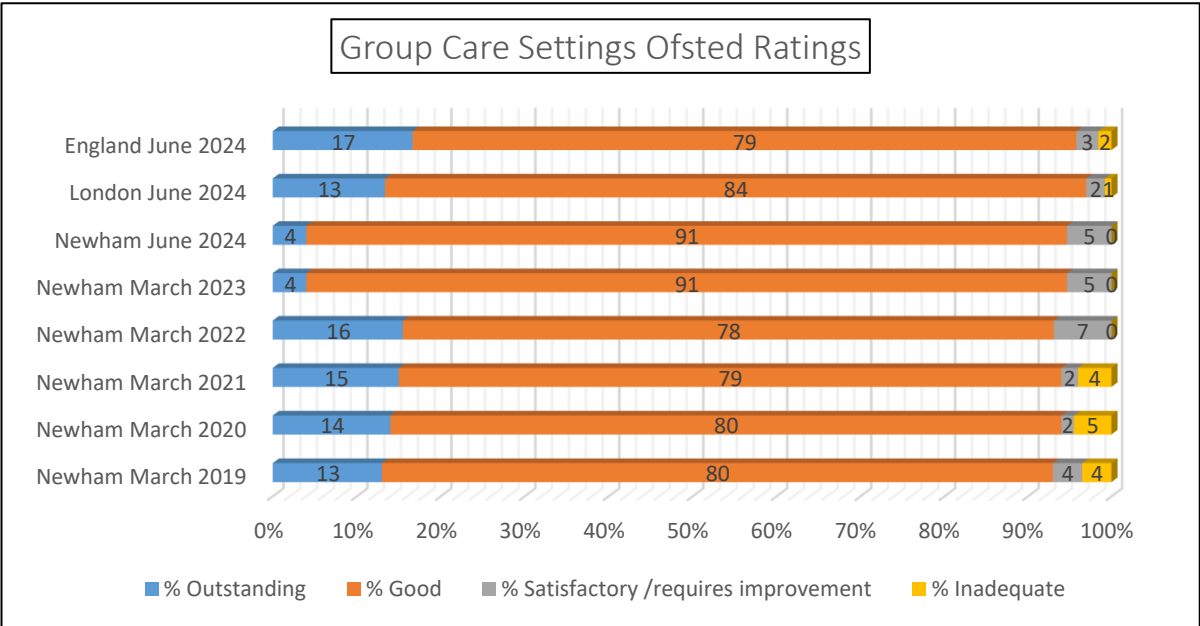
Type of Provision	Number of inspected Providers	% Achieving good or outstanding 2024	CSA 2023 comparison	Awaiting first inspection
Childminders	72	94.4	95.1	24
Childcare on domestic premises	2	100	100	0
PVI Group Care	75	94.7	94.7	31
Maintained Nursery Schools	7	100.0	100	0
Primary Schools and Academies	68	98.5	93.9	0

There is very little change in Ofsted grades overall compared to the CSA 2023. The most significant change is to the % of Primary Schools and Academies that are good or outstanding, improving from 93.9% to 98.5%. The only other change is a marginal decline in childminders receiving a good or outstanding Ofsted outcome. This dropped from 95.1% in 2023 to 94.4% in 2024. There remains increased flux in the childcare market since the pandemic, with more settings opening and closing than has historically been the case in Newham. This is reflected in the high number of PVI group care settings and childminders waiting on their first inspection.

In the most recent Ofsted profile data now available for Newham.(January 2025) an improved 96% of group care settings are reported as good or outstanding.

¹³ [Childcare providers and inspections: management information - GOV.UK](#)

Figure 15

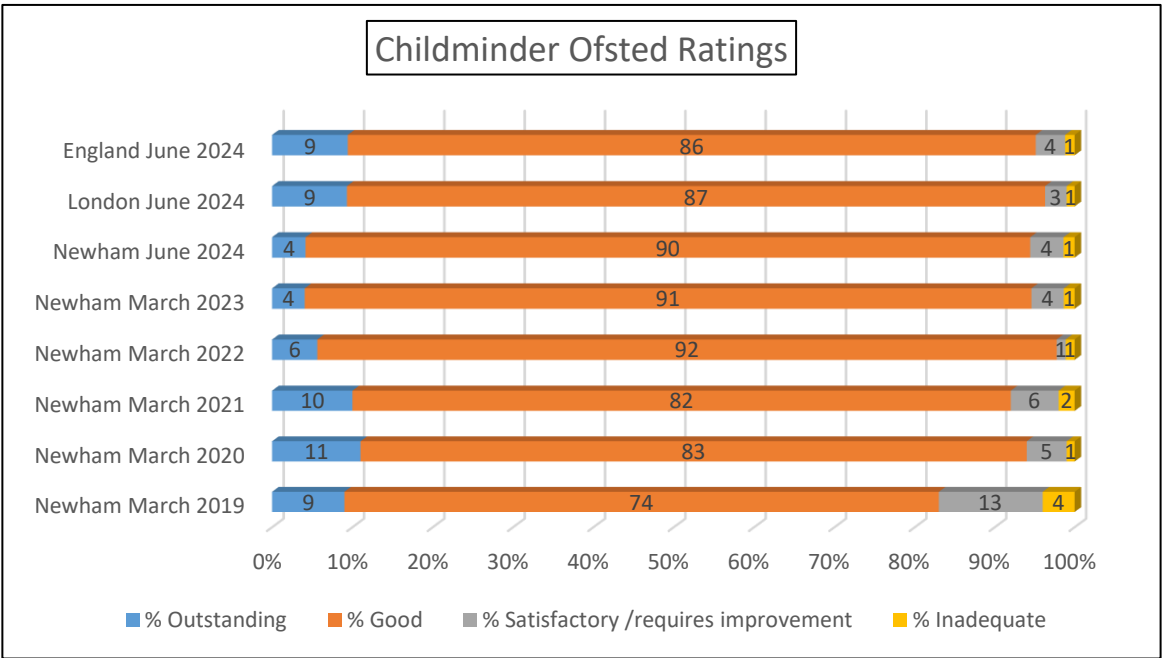


3.8a Group Care Ofsted Ratings.

Figure 15 shows the percentage of group care providers in each of the Ofsted inspection category ratings, with comparisons to London and England averages. There is no change in Newham between 2023 and 2024.

When compared to London and England in 2024, Newham has a similar proportion of good and outstanding providers, however a significantly smaller proportion in the outstanding category.

Figure 16



3.8b Childminder Ofsted Ratings

Figure 16 shows the percentage of childminders in each of the Ofsted Inspection category ratings for Newham, London and England in 2024, together with some previous year's data also for Newham. In Newham the percentage of childminders achieving good or outstanding dropped marginally from 95.1% in 2023 to 94.4% in 2024. In comparison to London and England. Newham has a similar proportion of good and outstanding providers, however a significantly smaller proportion in the outstanding category.

In the most recent Ofsted profile data now available for Newham.(January 2025) an improved 98% of childminder settings are reported as good or outstanding.

3.9 Cost of early years childcare

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

3.9a Charges Day Nursery settings.

Table 14

Average Day Nursery Full Fee paying Full Time 50 hours per week										
Age range	Newham weekly average 2021	Newham weekly average 2022	Newham weekly average 2023	Newham weekly average 2024	Newham per chargeable hour 2024	England weekly average 2024	Inner London weekly average 2024	Outer London Weekly average 2024		
0-2 no funded hours	£290	£308	£328	£383	£7.67	£305	£428	£356		
0-2 after deducting 15 funded hours				£287	£8.21					
2-3 no funded hours	£275	£286	£315	£355	£7.10	£291	£431	£349		
2-3 fee after deducting 15 funded hours	£203	£205	£228	£260	£7.44					
3-4 fee after deducting 15 funded hours	£199	£204	£229	£263	£7.50					
3-4 fee after deducting 30 funded hours	£137	£153	£170	£197	£9.86	£121	£198	£145		
Sources: Newham Provider Survey 2024										
Coram Annual Childcare Survey 2024 https://www.coram.org.uk/wp-content/uploads/2024/03/Childcare-Survey-2024.pdf										

Table 14 reflects the 14.9% increase in full time fees in Newham across the 0-5 age range since 2023, based on 61 survey returns from day-care nurseries. This increase is on top of the 11.4% increase reported last year. The 14.9% increase is significantly above the official inflation rate over the same period. Staff costs are the biggest component of providers costs and have increased significantly at this time where there are staff shortages and salary pressures in early years. In addition increased costs relating to energy, rent and food expenses have all contributed. Prices in Newham now sit between average charges for inner and outer London and above the average for England. The Coram Family and Childcare Trust national childcare survey 2024 also found that prices for charged hours increased. Prices increased in 2024 for a part time (25 hours) place in a nursery for children in Great Britain, by 7.4 % for those aged under two, and by 6.2 % for two year olds using the free entitlement.

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

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

Many providers will have incurred additional costs because of high general inflation, staff recruitment pressures, changes to the minimum wage and energy costs and this is reflecting in the higher fees being charged. Overall occupancy levels reported remain similar to reported for last year and remain below pre pandemic levels, and providers will need to continue adapting their business models to ensure they cover their costs and remain sustainable. The doubling of funded childcare hours (from 15 to 30 hours in September 2025), available to working parents with children under 3 is likely to increase the overall demand for childcare and may be an opportunity to generate additional income to support sustainability for participating settings.

3.9b Charges for childminder settings

Table 15

Average Childminder Full Time 50 hours per week								
Age range	Newham Weekly Average 2021	Newham weekly average 2022	Newham weekly average 2023	Newham weekly average 2024	Newham per chargeable hour 2024	England weekly average 2024	Inner London weekly average 2024	Outer London Weekly average 2024
0-2	£277	£297	£327	£387	£7.73	£254	£395	£385
2-3 no funded hours	£276	£284	£312	£385	£7.69	£254	£333	£326
2-3 fee after deducting 15 funded hours	£212	£220	£217	£280	£8.00			
3-4 fee after deducting 15 funded hours	£212	£217	£217	£269	£7.70			
3-4 fee after deducting 30 funded hours	£142	£131	£161	£172	£8.59	£100	£151	£127

Table 15 shows that full time childminder prices in Newham have increased by a significant 21% since 2023, based on the 34 survey responses. Childminder average charges are closely aligned to average nursery fees in Newham, though there is significant variation between childminders in terms of pricing.

Newham childminder prices are above the national average and also above London averages for some age ranges. Most childminders also offer part time places and commonly charge a higher hourly rate for this service.

3.10 Hours of Operation

3.10a Day nurseries

The most common number of hours offered by day nurseries is ten hours per day. The most common start and end times are 8am and 6pm. Longer hours are available in some settings. The earliest start time is 6.30 am and 24 settings start earlier than 8am. The latest end time is 7pm and 16 providers have a later end time than 6pm. All operate Monday to Friday.

3.10b Childminders

Overall, childminders have a greater capacity to accommodate out of hours or changeable childcare needs. The most common start times are 7am and 8am. Nearly half (48%) of childminders have a start time of before 8am. The earliest start time is 6am. The most common end time is 6pm, but around a quarter (26%) offer later end times and the latest end time is 9.30 pm. Eleven childminders recorded that they offer a weekend service.

3.11 Funded Early Education and Childcare Sufficiency

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

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

above will be entitled to 30 hours (1140 hours over a year) of early education and childcare.

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

Take up of funded early education overview

The proportion of eligible children taking up funded two and universal three and four year old early education in Newham according to DfE January census is shown in Table 16, together with comparisons against previous years, London, and England for 2024.

Take up of the funded entitlements dropped significantly across the board in Newham, London and England in January 2021, during the Covid-19 pandemic. Take up has now fully recovered and in Newham is now at a high point, compared to previous years.

There are now more options to parents in Newham looking to access funded hours to meet their needs across the year. There are now also 94 providers offering a “stretched” free entitlement, so that parents can access their annual entitlement of funded hours across the year, this is an increase from the 76 that were reported last year.

Table 16

% of eligible children taking a funded place (DfE January Census)	Newham Jan 17	Newham Jan 18	Newham Jan 19	Newham Jan 20	Newham Jan 21	Newham Jan 22	Newham Jan 23	Newham Jan 24	London Jan 24	England Jan 24
Age 2	43%	50%	52%	53%	46%	60%	64%	72%	67%	75%
Age 3 and 4 (universal 15 hours)	82%	82%	82%	83%	79%	86%	88%	90%	85%	95%
Age 3 and 4 Number of children receiving extended "30 hours		900	1129	1267	1206	1420	1458	1426		

% of eligible children taking a funded place (DfE January Census)	Newham Jan 17	Newham Jan 18	Newham Jan 19	Newham Jan 20	Newham Jan 21	Newham Jan 22	Newham Jan 23	Newham Jan 24	London Jan 24	England Jan 24
Age 2	43%	50%	52%	53%	46%	60%	64%	72%	67%	75%
Age 3 and 4 (universal 15 hours)	82%	82%	82%	83%	79%	86%	88%	90%	85%	95%
Age 3 and 4 Number of children receiving extended "30 hours		900	1129	1267	1206	1420	1458	1426		

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

This section looks at sufficiency for the existing two year olds scheme for low income/disadvantaged families. Sufficiency for the expanded under threes scheme for working families is considered at 3.12d.

Figure 17

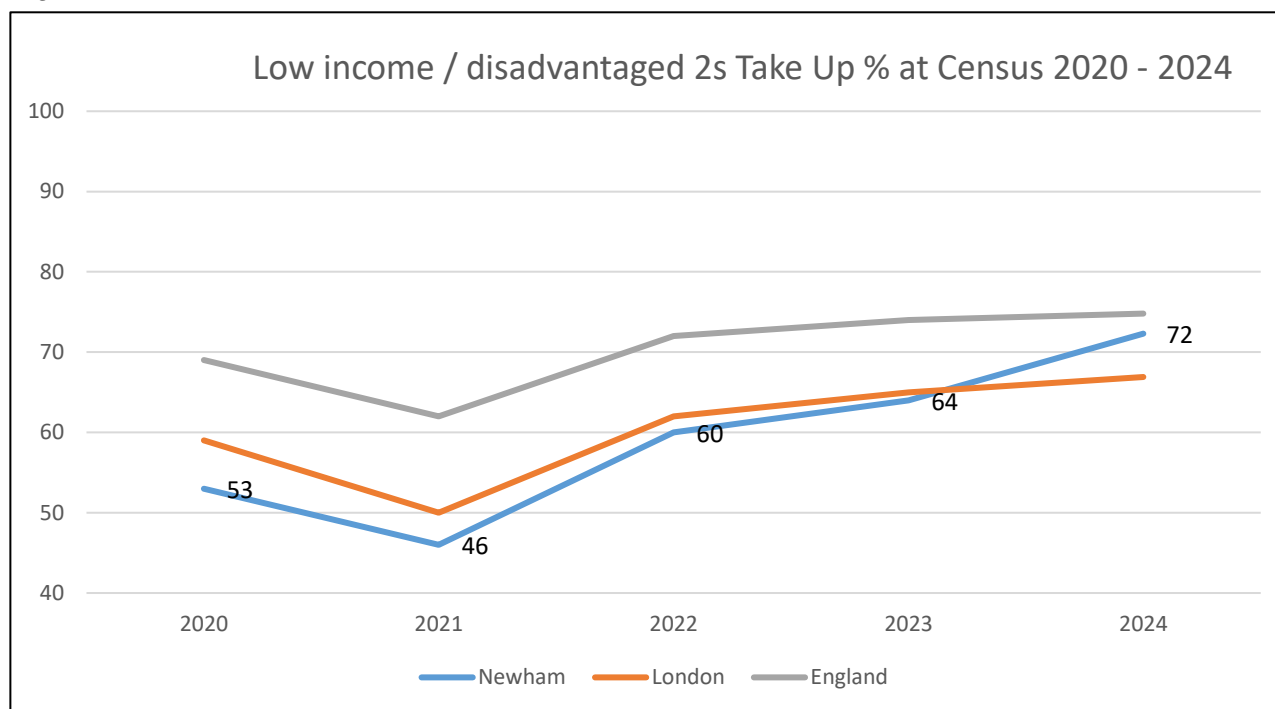


Figure 17 shows that take up rate for eligible families with two year olds in Newham has recovered significantly since the pandemic and improved in comparison to London and national averages. In January 2024 take up rates in Newham have overtaken the the London average and is now close to the England average.

At census 2024 Newham still had over 1,600 children eligible for a funded two-year-old place, the highest reach target of any London Authority. However, the number of families eligible to benefit from funded 2-year-old places is in decline. This is in part a result of the Government set benefits income threshold for the scheme, which has not being uplifted for a number of years. It is also a consequence of falling birth rates across the country. This means that despite improvements in the proportion of eligible children that are accessing places, the

actual number of children able to benefit has fallen by 19% in Newham since 2022 and by 18% in England.

Figure 18

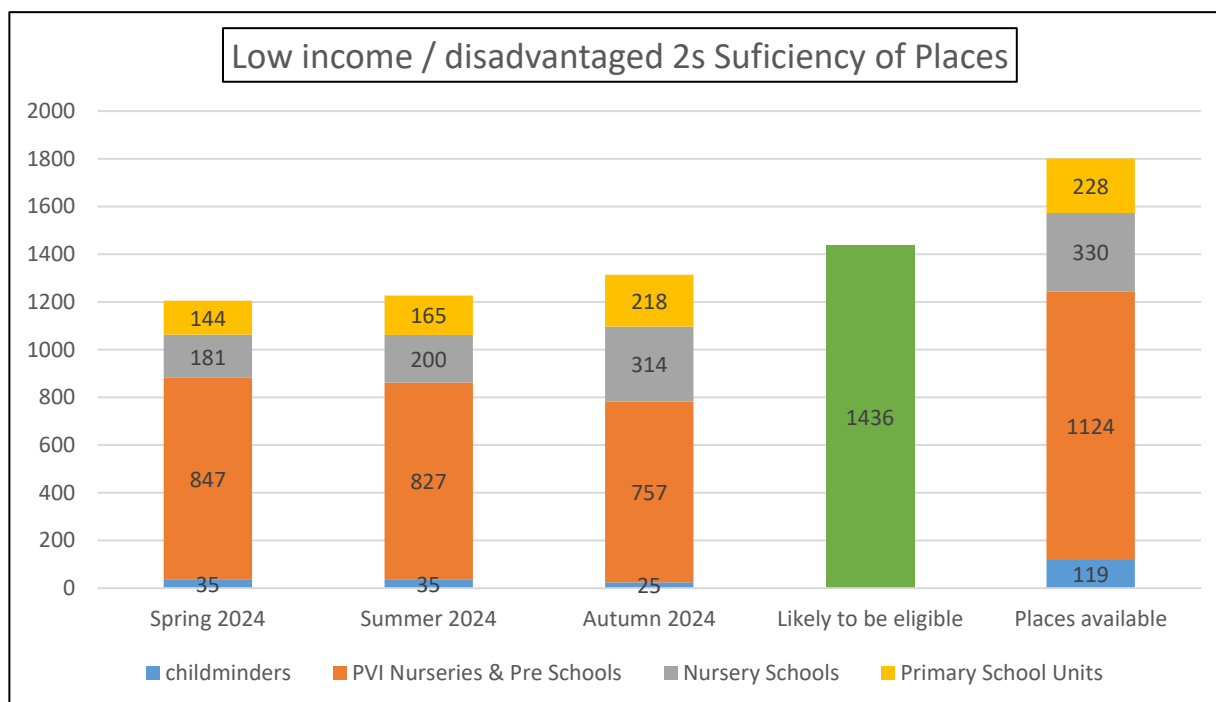


Figure 18 summarises the take up of funded places for 2s in Newham over 2024. The number of children taking up two year-old funded early education places has increased over 2024, with 1,314 children accessing places in Autumn 2024. With the number of families estimated to be eligible for the scheme in decline, the percentage of eligible families taking up their places has increased to 91.5% by autumn 2024. This is the highest ever recorded % of eligible families taking up the offer in Newham. The number of places available to the scheme in autumn 2024 is 1,801, less than the 1,991 that were available in autumn 2023. PVI nurseries and pre-schools offer the largest number of places to the scheme at 1,124. Nursery school and School places are popular with parents and operate closer to capacity than other provider types. There is unused capacity in PVI nurseries and pre-schools and childminders.

Total unused places available to the scheme in autumn 2024 was 487, down from 784 reported in the CSA 2023 and overall, but there are more than sufficient places to meet current demand. The roll out of two year old places for working parents over April 2024 to September 2025 will be able to draw on the unused capacity identified here, but the Local Authority will want to manage and support providers to offer places to meet demand across both schemes in 2025 and beyond.

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

Figure 19

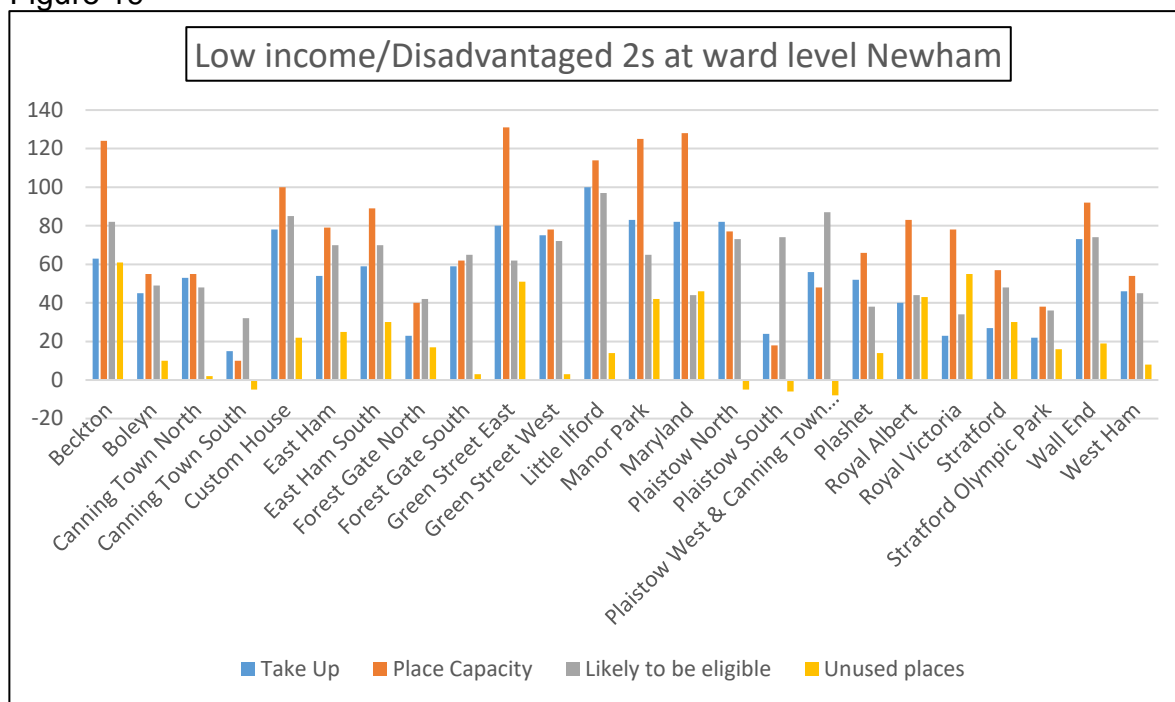


Figure 19 illustrates the pattern of take up, capacity and eligibility at a ward level in Newham. There are four wards where reported places available and take up in the autumn term 2024 show no spare capacity. These are Plaistow West and Canning Town East, Plaistow South, Plaistow North and Canning Town South. In practice, some providers have been able to provide more places than they had indicated where demand has been high. This can be achieved by bringing in capacity earmarked for the working families scheme where this has not been used.

Those wards with the most unused places are Beckton (61), Royal Victoria (55) and Green Street East (51).

The total number of providers offering places in autumn 2024 was 175, significantly up from 147 in 2023. This change is brought about by an increase in the participation of childminders, up by 20 to 62, PVI Nurseries up by 6 to 92, Schools up by 2 to 14, while all 7 Nursery Schools continue to participate. Most participating settings are now spreading their places for two year olds across both the low income / disadvantaged scheme and working parents scheme – hence a lower number of places available for this particular scheme despite the higher number of providers participating.

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

Figure 20

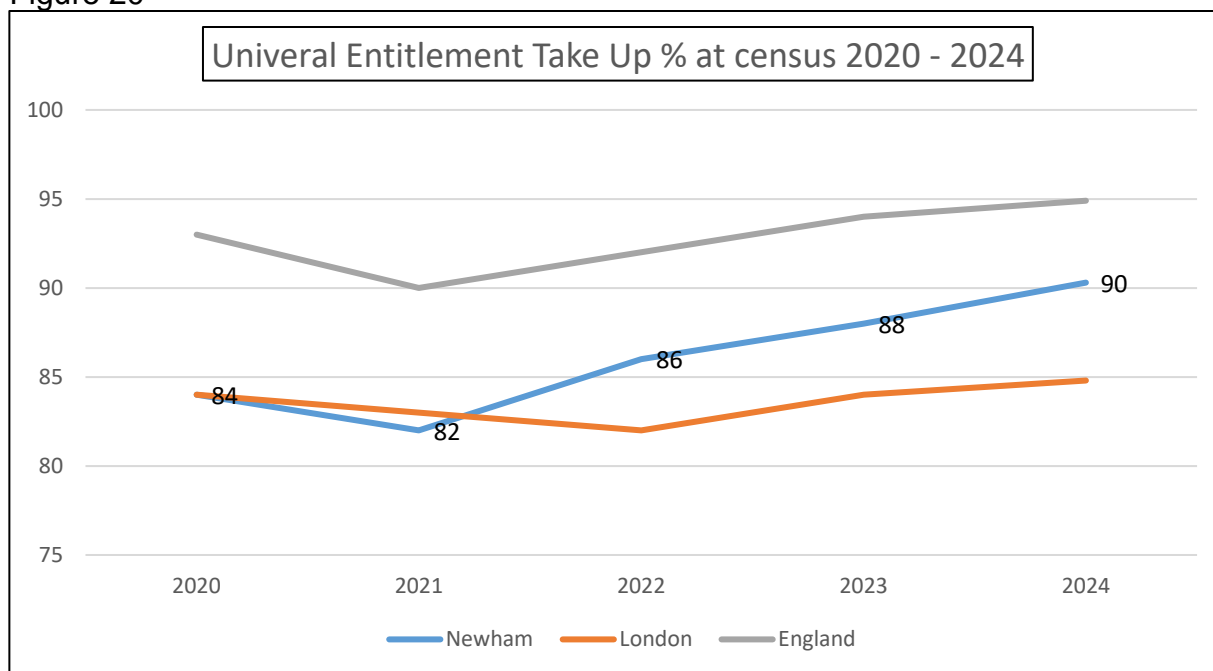


Figure 20 shows that Newham's take up of the universal three and four year old funded entitlement over the period 2020 to 2024 and provides a comparison with take up rates across London and England.

In 2021, there was a decline in take up during the pandemic across the country. Take up in 2024 has now recovered well in Newham with 90% of families taking up the offer. This is now 5% above the London average, with the gap to England average continuing to narrow.

Figure 21

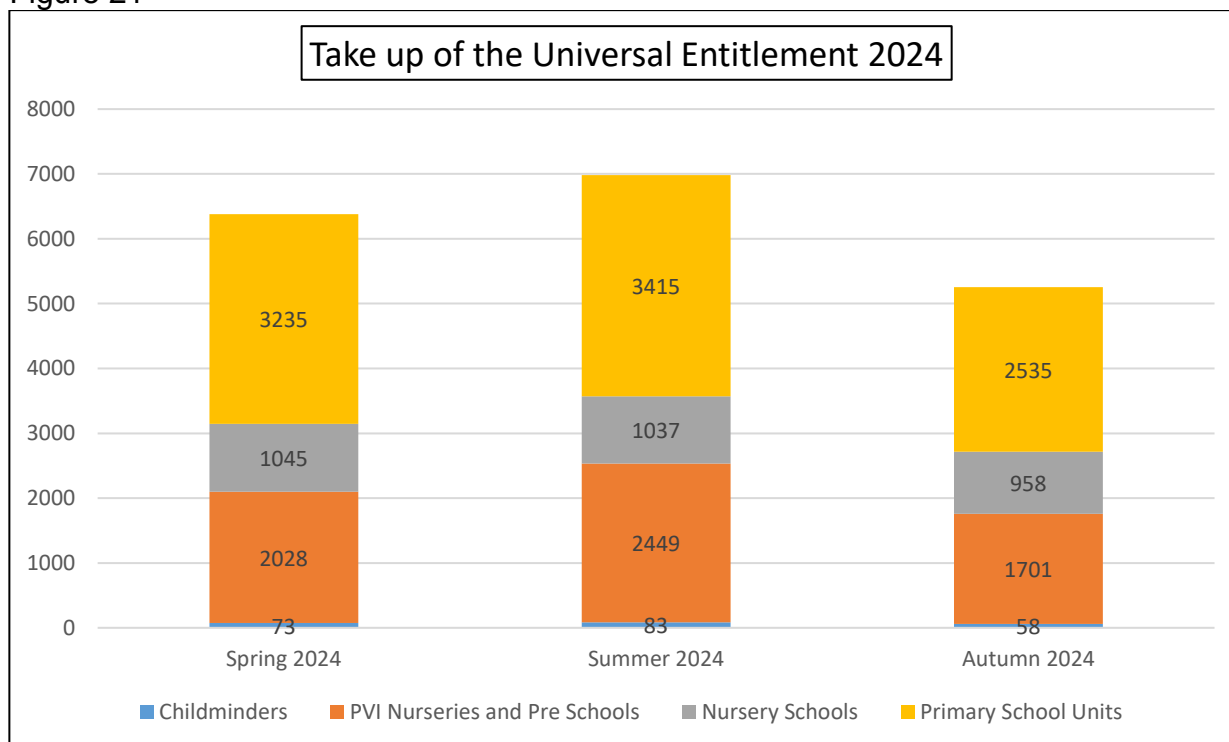


Figure 21 shows that the delivery of the universal offer is shared across all types of provider. Schools are the biggest provider type delivering the offer in Newham at 49% of all places across the three terms of 2024. PVI group care deliver 33%, nursery schools 16% and childminders 1%.

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

3.11c 30 Hour offer for Working Parents

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

Eligibility. The conditions for eligibility include:

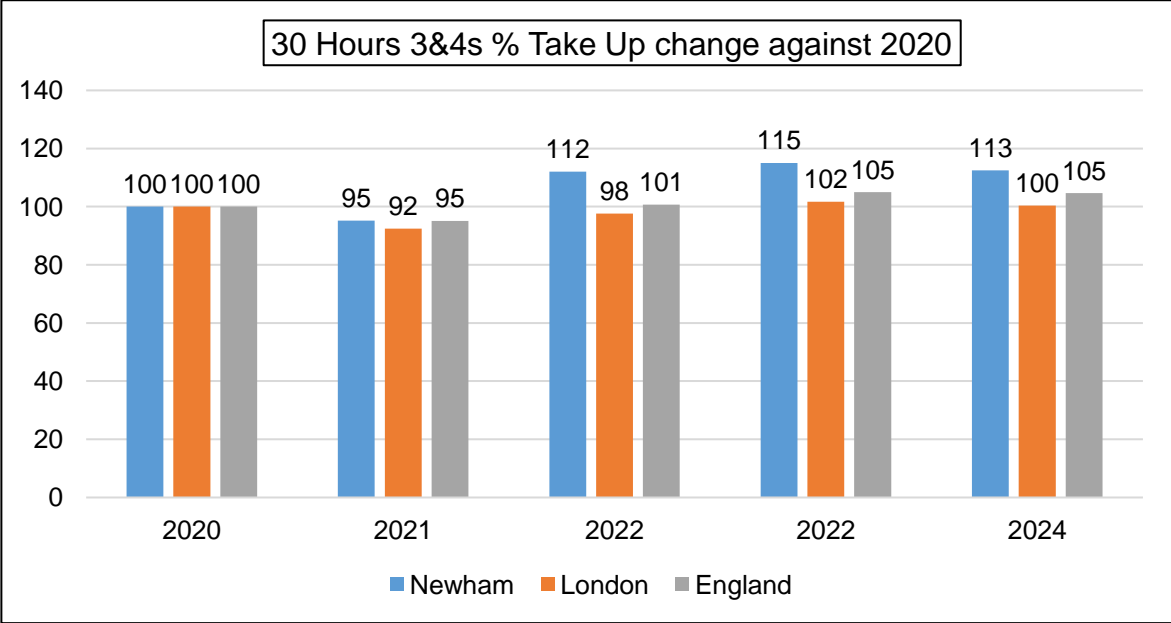
- working parents with children aged three and four;
- parents working part-time or full-time – each parent must earn at least the equivalent of 16 hours per week at the national minimum wage and below £ 100,000 per annum;
- parents who are employed or who are self-employed
- lone parents who are working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

Assessing demand for 30 hours places

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

Figure 22 shows that Newham's take up of the funded thirty hours scheme for working parents has grown by 13% since 2020. In London and England the total number of participants now exceed pre pandemic levels but have grown more slowly than in Newham according DfE census data.

Figure 22



A seasonal pattern to place take up, linked to entry to School reception each September, means that attendance is highest in the summer term and lowest in the autumn term. In summer 2024 Newham had 1,816 families on the scheme, slightly down from the 1,830 places taken up in summer 2023. Figure 23 shows take up and capacity by provider type for the peak summer 2024. At this point Nursery Schools were close to capacity. However, there is unused capacity in all other types of provision. Overall, there were 923 unused places in the summer term, with places available in most types of setting, and there is sufficient supply overall.

Figure 23

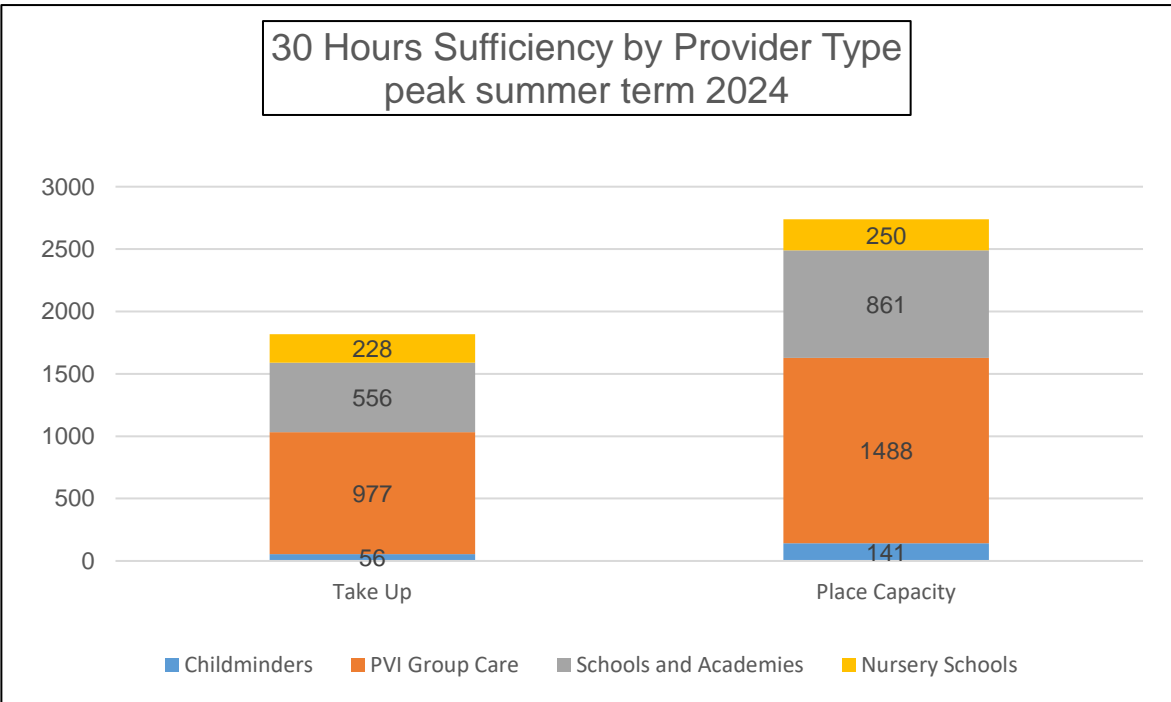
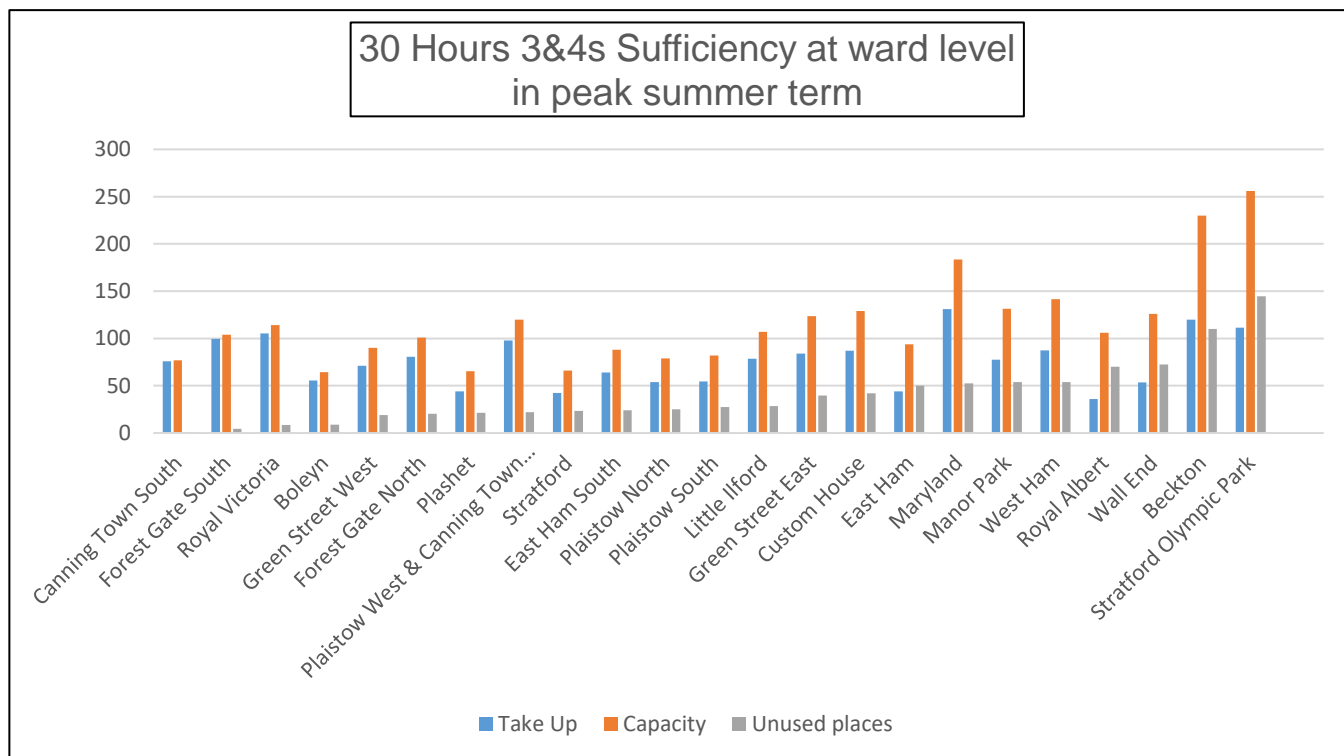


Figure 24 provides an analysis of sufficiency at ward level in summer 24. Ward level data indicates that some wards may come under supply pressure in future peak summer terms, with take up at capacity in Canning Town North and Canning Town South and close to capacity in Forest Gate South (5 spare places) and Royal Victoria (9 spare places). Some settings will have the flexibility to change child numbers using the different funded entitlement offers and age ranges at times of high pressure.

The wards with the highest take up of over one hundred places were Maryland, Beckton, Stratford Olympic Park and Royal Victoria. Take up was lowest in Royal Albert, Straford, Plashet and East Ham all of whom had under 50 places taken.

Figure 24



3.11d Expanded funded entitlement for children under three

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

- Since April 2024 eligible working families with children aged two have been able to get 15 hours per week (570 hours over a year)
- Since September 2024 eligible working families with children from 9 months have been able to get 15 hours (570 hours over a year)
- From September 2025 eligible working families with children from 9 months upwards will be able to get 30 hours (1140 hours over a year)

This expansion is designed to help working families and the criteria to be eligible matches that

already in place for the existing 30 hours scheme for working families with children aged three or four. Our latest analysis of sufficiency reflects existing take up patterns across the first three terms of the expansion, but prior to the final phase when the available hours doubles from 15 to 30 hours for eligible families. As this is a new scheme that has not yet been fully implemented, there remains a level of uncertainty about both demand and supply, and the estimates currently shown will need to be regularly reviewed, updated and shared with key stakeholders.

Table 17 summarises the sufficiency position in spring term 2025 for the 9 month up to two age group working families scheme.

For eligible children under two 71.2% of the available 15 hour places were being used in Spring term 2025. Nearly all of the places are made available through private and voluntary nurseries, pre-schools and childminders. With growth in places having been achieved during the year (increasing from 854 to 1,008) there are sufficient under 2 places for the current 15 hour offer. However, more growth in places is needed to respond to the doubling of entitlement hours from 15 to 30 in September 2025. At this point we estimate that an additional 250-350 of 30 hour places for under twos will need to be added. The creation of places is underway and capital grants to support the creation of around 150 places for under twos was recently approved in Newham. The new Governments School based Nursery Capital Grant may also be able to support the development of additional capacity across the early years age ranges. Further work will need to be done to track demand patterns, and nurture and support place creation in the age ranges and areas of the borough where need is highest.

Table 17

9 Months up to 2 childcare for working parent scheme sufficiency (15 hours)	
Places available 2024/25	Under 2s
PVI Group Care	852
Childminders	126
Schools and Academies	30
Nursery Schools	0
Total Places available	1008
Take up Spring 2025	718
% of available places taken	71.2

Figure 25 shows the places available and take up at ward level in Spring term 2025 for eligible families with children aged from nine months up to two. The wards where there is significant pressure on places are shown to the left of figure 25 and are Plaistow South, Forest Gate South, Plashet, West Ham and Plaistow West and Canning Town East. In some cases wards with a surplus of places can be a resource for families living in neighbouring wards that are less well served.

Figure 25

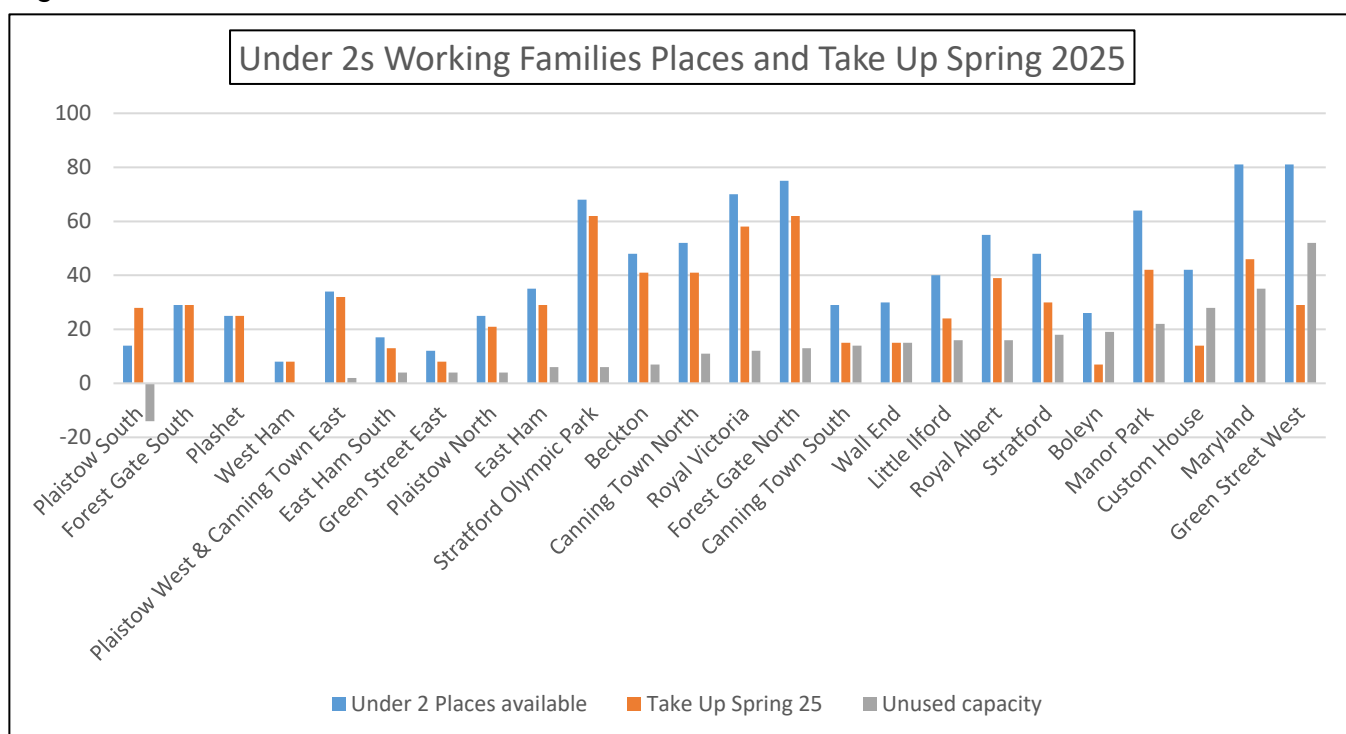


Table 18 summarises the sufficiency position in Spring term 2025 for two year olds.

For eligible children aged two, 56.2% of the available 15 hour places were being used in Spring term 2025. At this age there is a wider range of providers currently engaged with places being made available through Schools and Nursery Schools, added to the places being made available by private and voluntary nurseries, pre-schools and childminders. Again, some growth in places has been achieved during the year (increasing from 1,624 to 1,687). There are sufficient two year old places for the current 15 hour offer and there is less need for growth than is the case for under twos.

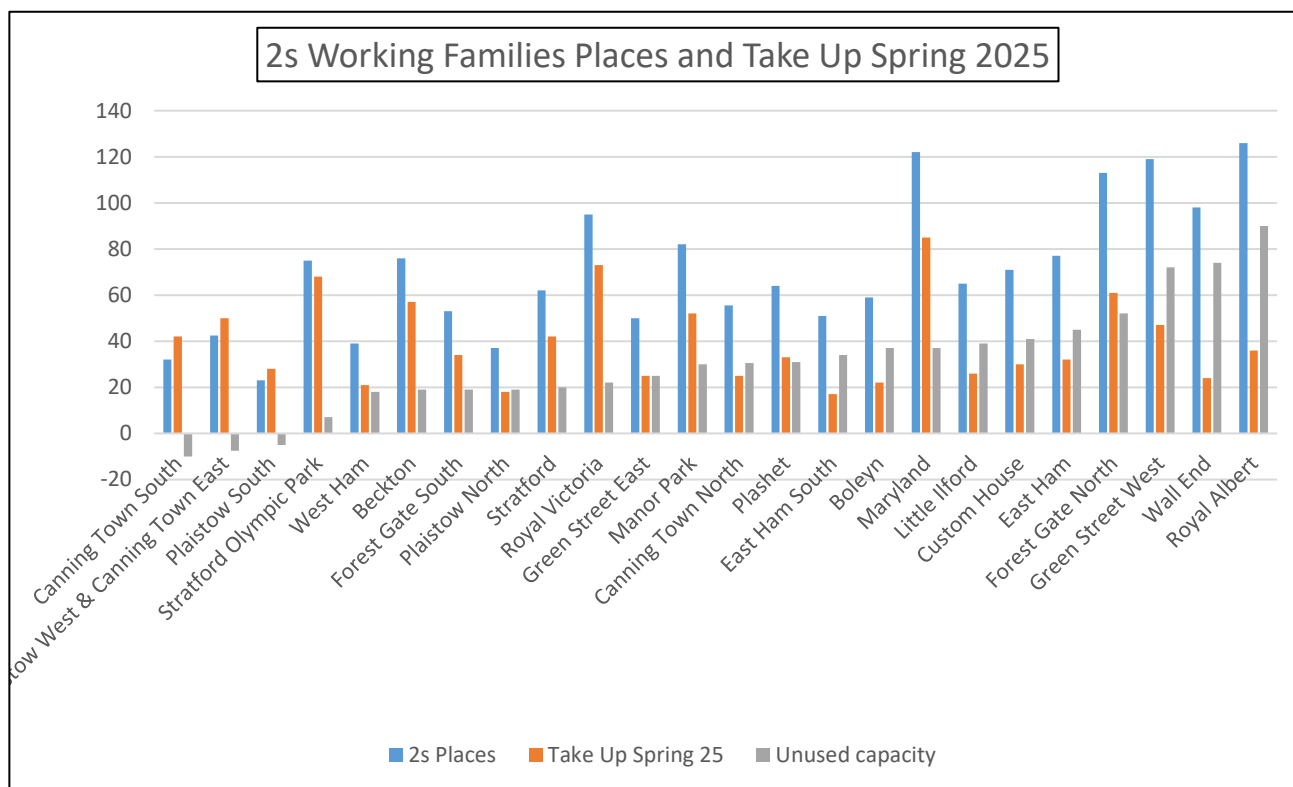
However, some growth in places is needed to respond to the doubling of entitlement hours from 15 to 30 in September 2025. At this point we estimate that an additional 150-200 30 hour places for children aged two will need to be added. The creation of places is underway and capital grants to support the creation of up to around 180 places for twos was recently approved in Newham. Further work will need to be done to track demand patterns for this new scheme and nurture and support place creation in areas of the borough where there is need.

Table 18

2 year olds childcare for working parent scheme sufficiency (15 hours)	
Places available 2024/25	2s
PVI Group Care	1265
Childminders	167
Schools and Academies	130
Nursery Schools	125
Total Places available	1687
Take up Spring 2025	948
% of available places taken	56.2

Figure 26 shows the places available and take up at ward level in Spring term 2025 for eligible families with children aged two. The wards where there is significant pressure on places are shown to the left of figure 26 and are Canning Town South, Plaistow West and Canning Town East, Plaistow South, West Ham and Beckton. In some cases wards with a surplus of places can be a resource for families living in neighbouring wards that are less well served.

Figure 26



The DfE supplied an assessment of local supply and demand for the expanding scheme for working families with children under 3 in November 2024. This assessment estimates that Newham requires 398 additional places to meet demand in September 2025, with the majority of these places being needed in the under 2s age group. This analysis is broadly in line with our own assessment.

3.12 Business challenges

Newham providers were asked to rank their top business challenges in a provider survey in autumn 2024. The results are shown in Table 19.

The majority of responders identified the first four listed issues as their biggest challenges and these are the same four as reported in 2023, but with staff recruitment and retention identified as the biggest challenge and business cost inflation second. Recruitment and retention is acknowledged as a national issue for the early years sector. A study by the Institute for Fiscal Studies¹⁴ substantiates provider concerns about cost inflation and found that one of the biggest challenges

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

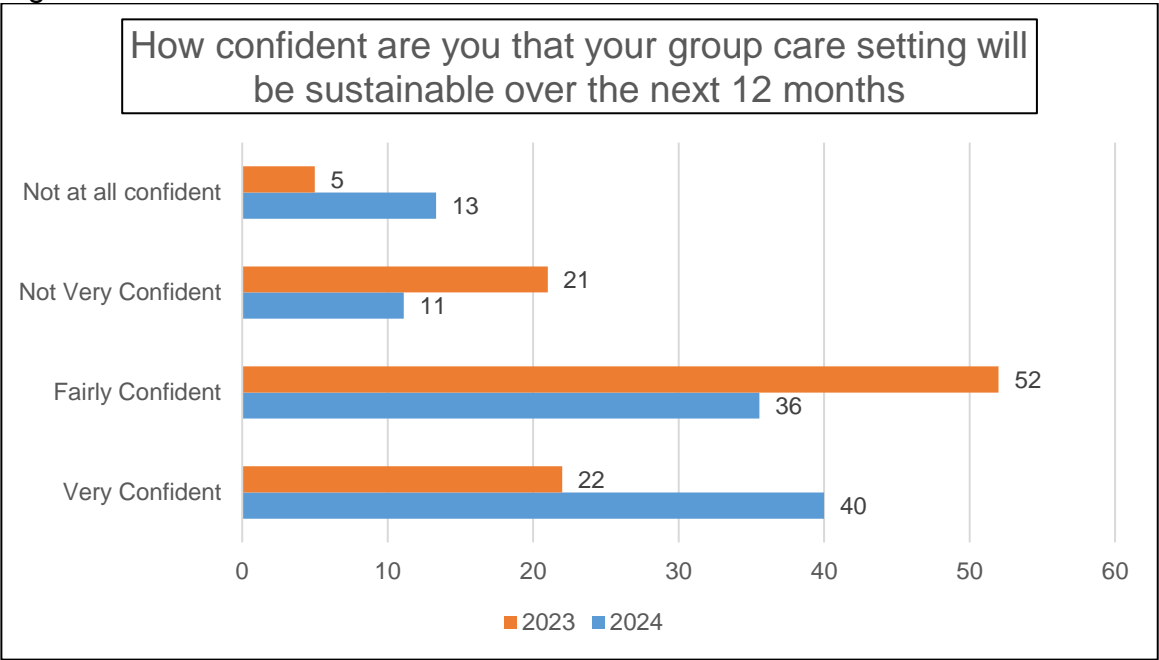
facing early year’s providers now is the impact of rising costs. “Last year prices facing childcare providers were 11% higher than they had been three years earlier, before the pandemic. By comparison, over the same period, consumer prices had risen by 7%, while the prices in the economy as a whole had risen 9%.”

Table 19

Top Business Challenges	
1	Staff retention and recruitment
2	Business cost inflation
3	Attracting new customers
4	Cash flow
5	Understanding changing patterns of childcare needs
6	staff well being and morale
7	Staff training
8	Managing relationships with parents using services

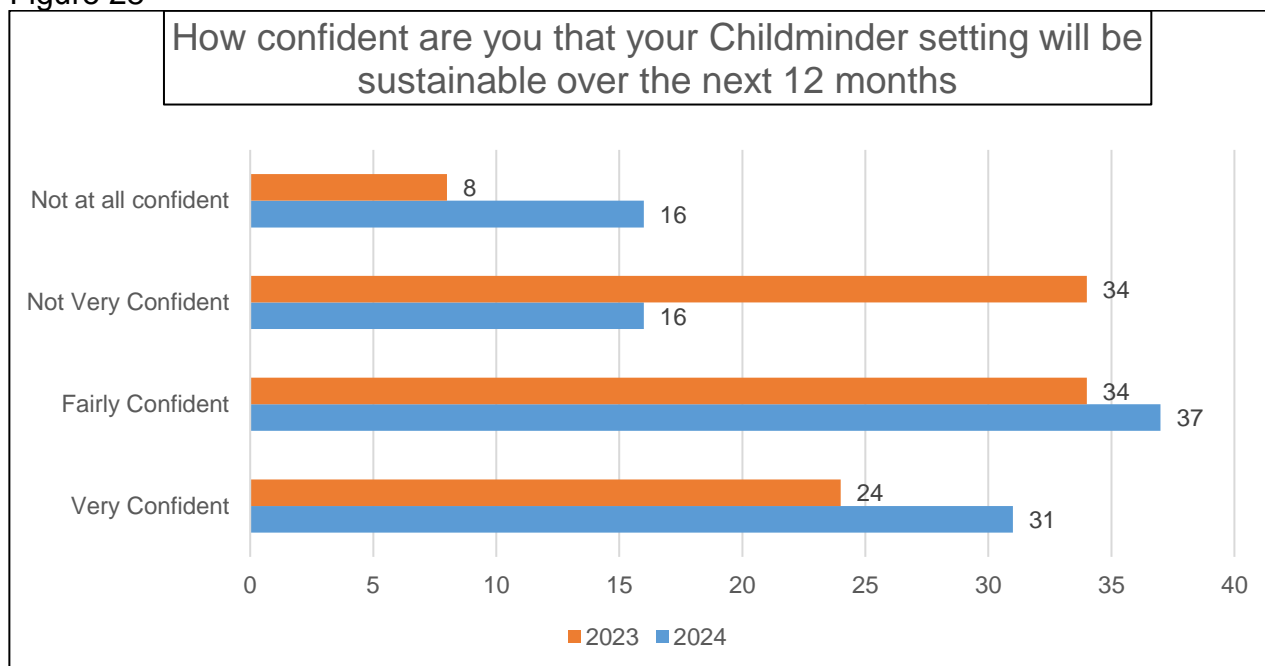
When asked about sustainability over the next 12 months 76% of the 45 PVI group care responders said they were either very confident or fairly confident of their continuation, 11% were not very confident and 13% (6 settings) not at all confident. There appears to be a polarizing of confidence with more providers very confident and more providers not confident at all than was the case in 2023. This is illustrated in figure 27.

Figure 27



A similar pattern can be seen in figure 28 with regard to childminder confidence in their sustainability. In 2024 more of the 32 who responded to this question were very confident or confident than identified as this in 2023, but there is also an increase in the proportion of childminders who are not at all confident (5 childminders).

Figure 28



Newham providers were invited to provide observations about the sufficiency of childcare in the borough and ways in which they could be supported to meet parental needs. A wide range of views were expressed and these are summarised in the headings below.

Recruitment and Training

- **Recruiting Appropriate Staff:** Focus on attracting qualified individuals who are passionate about childcare. Offering competitive salaries and benefits can help.
- **Training Opportunities:** Provide a wider range of training courses to ensure staff can continually develop their skills. Making training free can also encourage more participation.
- **Encouraging Childcare as a Profession:** Promote childcare as a viable and rewarding career path to attract more students and practitioners to the field

Financial Support

- **Funding for SEND Children:** Increase financial support for children with Special Educational Needs and Disabilities (SEND) within Private, Voluntary, and Independent (PVI) settings.
- **Funded Childcare:** Use the term “funded” instead of “free” to emphasize the financial support aspect.
- **Sustainable Funding Rates:** Advocate for a more sustainable funding rate for three and four-year-olds to ensure nurseries can continue to operate effectively.
- **Monthly Funding Payments:** Suggest that funding be paid monthly to help nurseries manage their outgoings and maintain a steady income.

Support for Childminders and Nurseries

- **Education for Parents:** Educate parents about the funded schemes to ensure they understand the importance of attendance and the required documentation.
- **Support from Children’s Centres and Schools:** Encourage children’s centres and primary schools to welcome childminders and offer playgroup sessions.
- **Mentorship and Business Support:** Provide mentorship and business support for nursery

owners to help them navigate the complexities of running a nursery.

Addressing Challenges

- Primary Schools Offering Places Mid-Term: Advocate for policies that prevent primary schools from offering places to children mid-term, which affects nursery funding.
- Over-Ratio Childminders: Ensure childminders adhere to ratio regulations and direct new customers to compliant childminders.
- Portal Access and Payment Systems: Improve the accessibility and functionality of the funding portal and ensure timely and accurate payments to nurseries.

Additional Suggestions

- Use of Empty Properties: Utilize empty properties to expand nursery businesses.

4 Supply of services for over- fives

4.1 Types of registered provision for over 5s

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

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

4.2 Expansion of wraparound care and free breakfast clubs for primary age children

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

with travel time, unless data shows that local demand is for different hours, for example, to reflect local labour market patterns.

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

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

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

Figure 29 shows the strong progress that has now been made in rolling out new, extended and/or expanded wraparound care places serving Schools. Prior to the expansion initiative the Local Authority updated its assessment of the places available. In summer 2024 there were 36 schools that had access to 8-6 places either on site or by arrangement with an off site provider. A further 35 schools had some wraparound either breakfast and/or after school but not across a minimum of 8-6 and there was 1 School where no wraparound care was available. By February 2025 there were 55 schools with access to 8-6 places, 17 with some wraparound available and none where there was no access to any wraparound provision. As at February 2025 a total of 462 expanded and/ or new places have been created in Newham. A ward level analysis of school service offers is shown in figure 30.

Work is continuing to develop additional places across schools that are not yet served by an 8am – 6pm service offer. Newham is submitting a revised delivery plan to the Department for Education, which aims to confirm funding to create additional places for residents in areas of need.

Figure 29

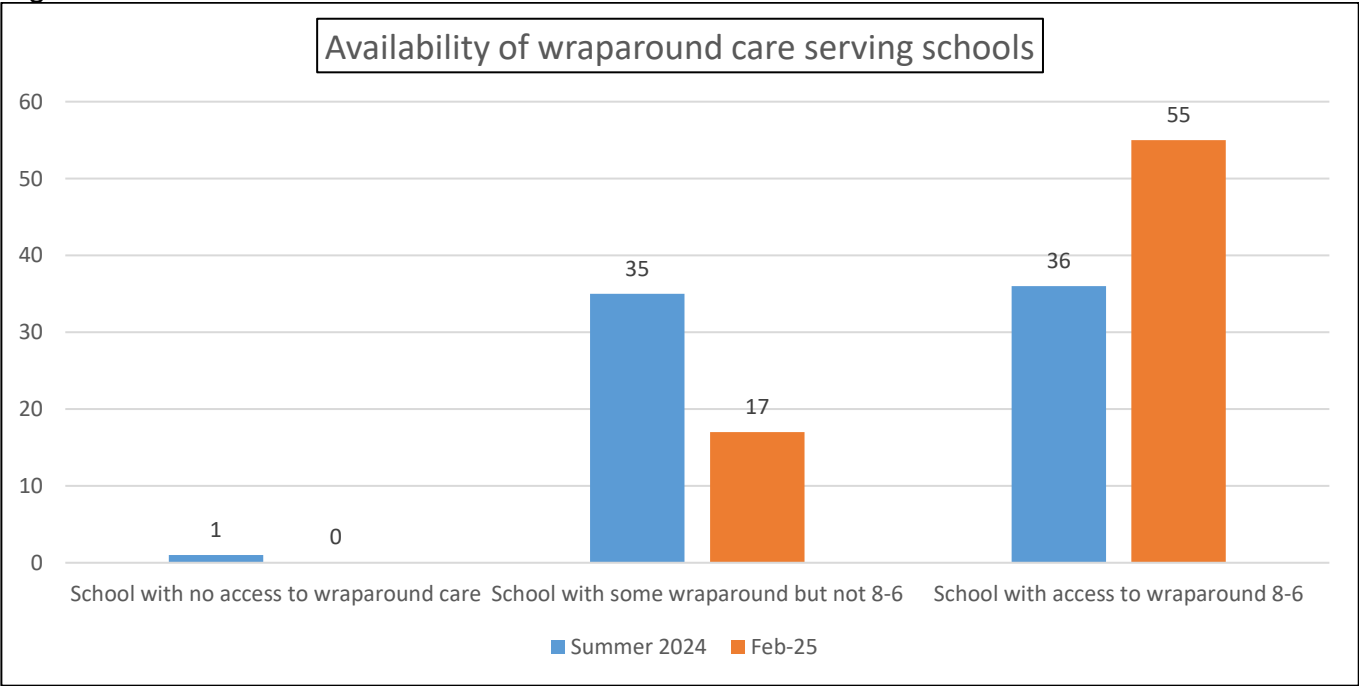
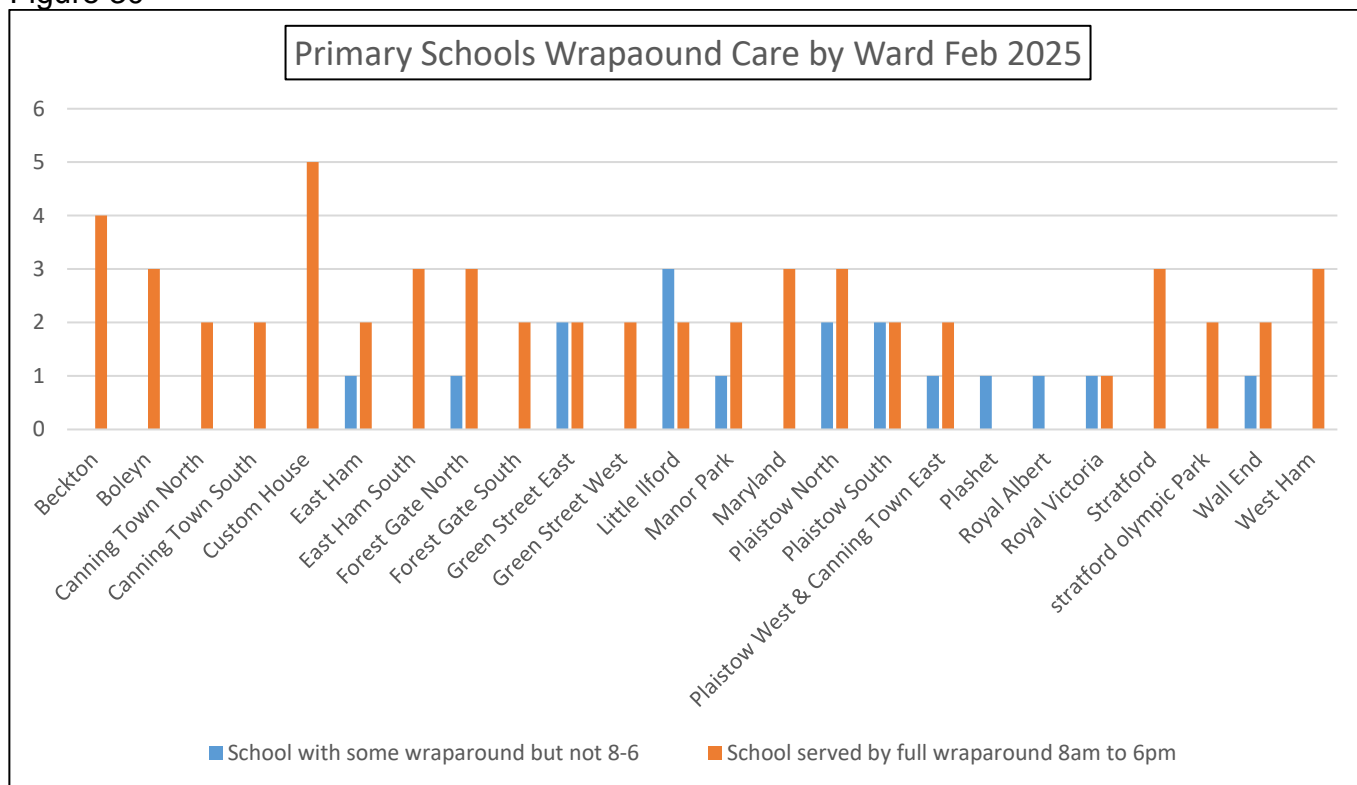


Figure 30



The new Labour Government has now confirmed that families will soon be able to start accessing free breakfast clubs lasting 30 minutes for their children before school through a new free breakfast club programme. Schools are being invited to apply to be early adopters, starting in April 2025. Newham will be supporting participating Schools and will work to integrate services across the free 30 minutes breakfast club initiative and continuing 8am to 6pm expanded wraparound care initiative.

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

Table 20 shows that in total, there are 157 recorded providers of childcare for school age children during term time. This includes providers who offer any of breakfast clubs, after school clubs or holiday clubs or combinations of these. The number of places being shown overall is 303 higher than last year and has been achieved largely through the local implementation of the national wraparound childcare programme, detailed at 4.2. One downside is the number of childminders offering wraparound places for school aged children is in decline.

Table 20 Out of School Providers and places in Newham 2024

Type of Provider	Number of Providers 2024	Number of Places 2024	Places CSA 2023
Childminders	61	313	411
PVI out of school clubs	24	516	515
Schools	72	2820	2420
Total	157	3649	3346

Figure 31 shows the total number of breakfast, after school and holiday places available in 2024. The number of breakfast and after school places available are similar overall at 3120 and 3098 respectively. The number of holiday club places available are much lower at 874, with the majority of these being delivered by PVI settings, though some are located on school premises.

Figure 31

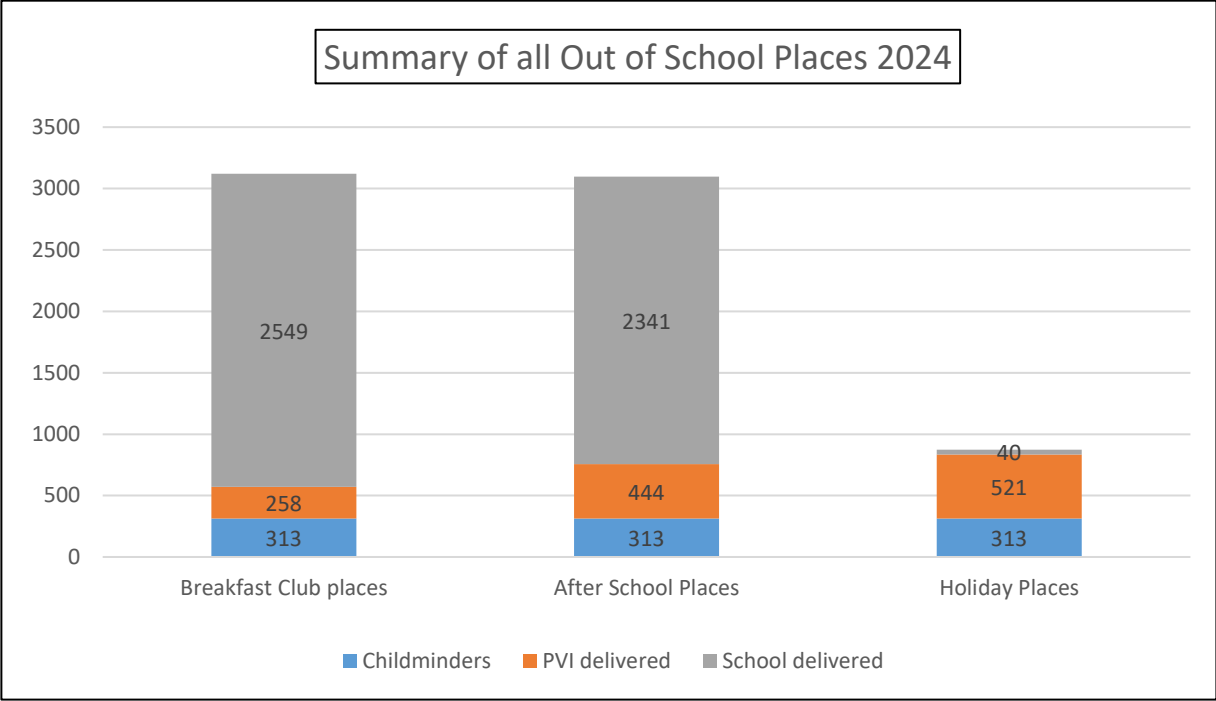
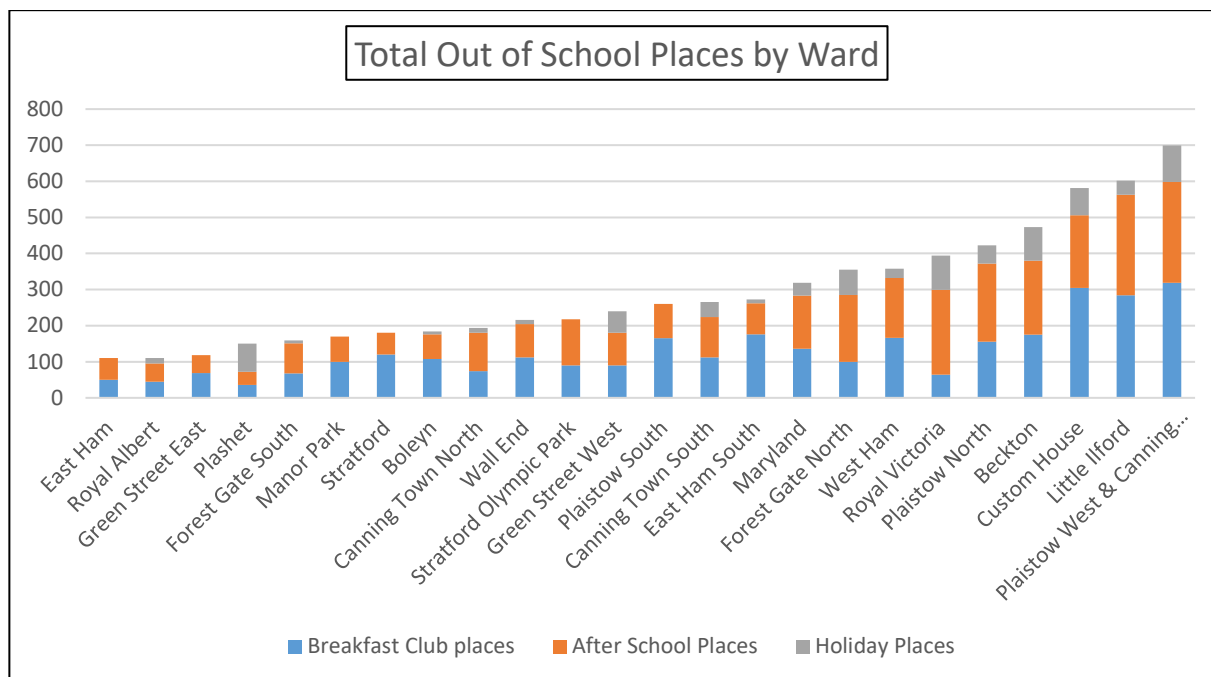


Figure 32 shows the distribution of all out of school places across the 24 wards of the borough. The wards with the lowest number of places overall are shown on the left hand side and include East Ham, Royal Albert, Green Street East, Plashet and Forest Gate South. There are 6 wards without any holiday care places identified.

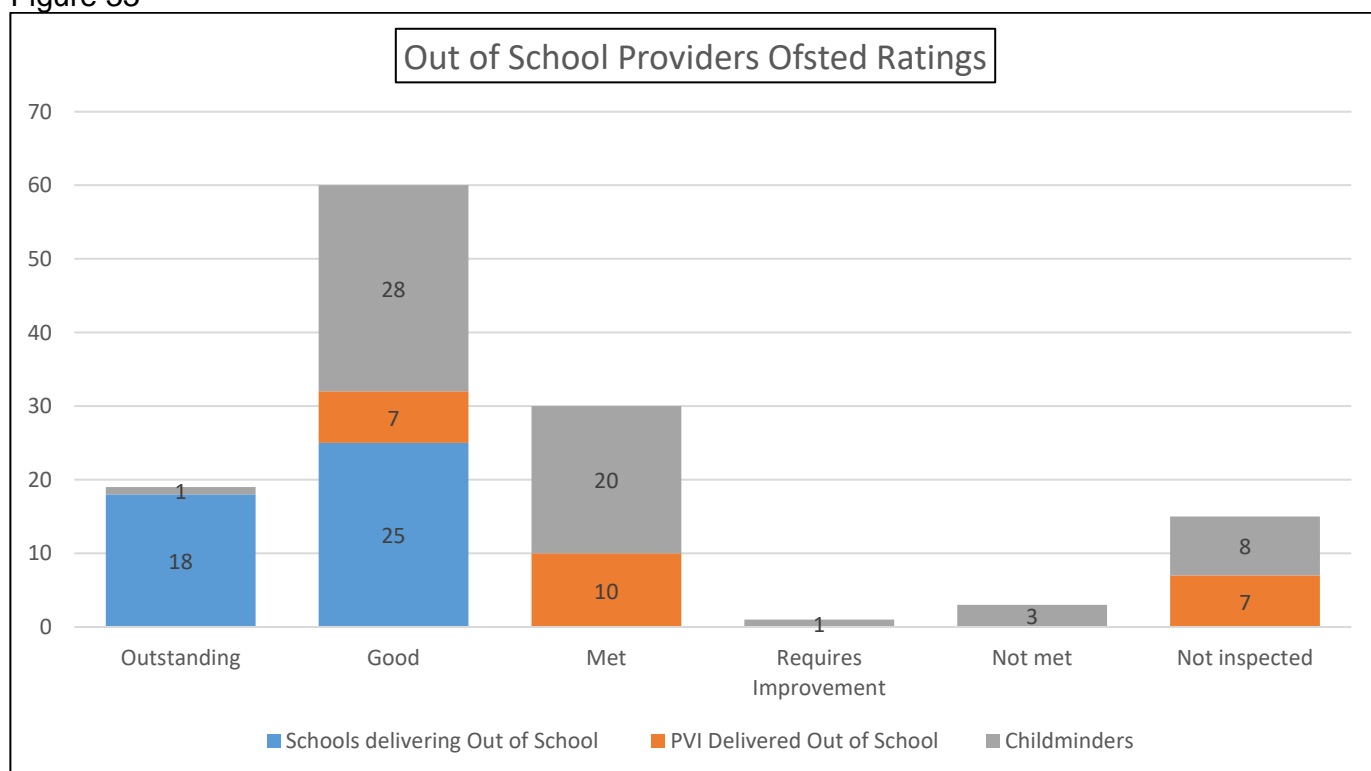
Figure 32



4.4 Out of School Provider Quality

Figure 33 summaries the Ofsted ratings for Newham's schools, PVI group care and childminder out of school provision. Most provision in schools is delivered by school staff and where this is the case, there is no separate Ofsted grade for the delivered out of school club and the inspection grade for the school has been included. Of the settings that have received an inspection, 96.5% are outstanding, good or met. There are 15 settings awaiting their first inspection.

Figure 33



4.5 Cost of childcare for over 5s

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

Table 20 shows that services for over 5s are more expensive on average when delivered by a childminder or a PVI group care provider, rather than delivered directly by a School. Childminder services commonly include pick up or drop off, as do some PVI group care providers and they may be able to offer greater flexibility with hours. Some of the schools surveyed do not charge for their breakfast or after school activities and the average number of hours are less, with a number of schools only offering clubs lasting an hour. Looking ahead we expect this to change as a result of the National Wraparound Childcare Programme which aims to expand 8am – 6pm wraparound care for all primary school pupils that need childcare around the school day.

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

Table 20

Average Weekly costs & Occupancy of Out of School Provision for over 5s 2024						
Provider Type	Newham average hours per week	Newham average hourly rate	Newham average weekly rate	Inner London	Outer London	England
Out of School Group care						
Breakfast	7	£6.21	£44			
After School	15	£5.37	£81	£123	£75	£69
Holiday Scheme	44	£4.58	£202			
Average occupancy autumn 2023			36%			
Average occupancy autumn 2024			43%			
Childminder Service						
Childminder breakfast / drop off	8	£7.06	£53			
childminder pick up / after school	15	£7.19	£108	£164	£91	£75
Childminder holiday full day	44	£6.28	£276			
Average occupancy autumn 2023			30%			
Average occupancy autumn 2024			42%			
Out of school by Primary School						

Breakfast	4.5	£2.48	£11			
After School	11	£3.79	£42			
Holiday (6 Schools only)	36	£3.11	£112			
Average occupancy autumn 2024			74%			

4.6 Occupancy of childcare for over 5s

According to Newham's provider survey, Out of school services in schools were relatively full in autumn 2024 at 74%, similar to the 77% reported in 2023.

Occupancy for out of school care is at a much lower base level for childminders, though it is improving. Childminders reported an average occupancy of 42% in autumn 2024, up from the 30% they reported for autumn 2023.

PVI out of school group care occupancy stood at 43% in autumn 2024, up from the 36% reported for autumn 2022. The 13 settings set up specifically for out of school reported higher occupancy rates than the nursery settings that offer out of school services as an add on to their core business.

4.7 Hours of Operation childcare for over 5s

According to the Newham provider survey 2024 the average childminder hours for breakfast clubs is 8 hours per week, for group care it is 7 hours per week and for Schools 4.5 hours. Across all individual providers the range of hours offered is between 3 and 15 hours per week.

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

The average childminder hours for holiday care in Newham is 44 hours, for group care it is 44 hours and for schools it is 36 hours. The range of hours offered across all individual providers is from 20 to 50 hours per week.

4.8 Newham Holiday Activities and Food Programme

Since its inception in 2018, the Department for Education's (DfE) Holiday Activities and Food (HAF) programme has supported children eligible for benefit-related free school meals during the school holidays. The initiative aims to ensure that children eat healthily, stay active, learn about nutrition, and engage with school and local services during their time away from the classroom. The Newham HAF Programme, which has been running since 2022, mirrors these objectives, growing each year to meet the increasing needs of the local community.

In 2024, the Newham Holiday Activities and Food (HAF) Programme continued to thrive, broadening its reach across more providers, wards, and activities to address the rising

demand for support among children and young people (aged 4 to 16) eligible for means-tested free school meals (FSM). According to data from the Pupil Monitoring and Benefits Team, the number of children and young people eligible for FSM was 22,195 in Easter, 23,139 in Summer, and 24,237 at Christmas.

Newham HAF funded 74,829 places through over 35 commissioned providers, delivering a safe and supportive environment during the school holidays. These providers, including private organisations and some voluntary, community, and faith sector (VCFS) groups, offered enriching activities and nutritious meals to children from low-income families. With an average uptake of 57% across the three holiday periods, the programme successfully met national participation standards.

The programme also made significant strides in diversifying its offerings to better meet the varied needs of local children and young people. New initiatives included exclusive clubs focused on dance, drama, cooking certification, and music production, as well as further additional SEND-specific activities and outings. Mainstream providers refined dedicated SEND sections within their programmes, ensuring children with mild to moderate additional needs or disabilities could fully participate. For those with more complex needs, specialist SEND HAF clubs provided tailored activities, ensuring all children and young people had the opportunity to engage meaningfully.

As part of our commitment to ensuring the success of the programme, we continued to actively build and strengthen relationships with our providers. This was achieved through a range of pre-delivery and delivery quality measures, including the development of the Newham HAF toolkit and quality assessment paperwork and due diligence requirements for providers before launching their programmes. Additional support included listings on the booking system, site visits, regular provider newsletters, and Public Health Team support with catering. We also facilitated delivery 'Kick Off' meetings and provided targeted training sessions on key topics such as SEND, safeguarding, mental health first aid, paediatric first aid, environmental sustainability, bid writing, and wraparound care. These efforts ensured that providers were well-equipped to meet the diverse needs of participants.

Our marketing efforts were both comprehensive and strategic, reaching families and the wider community through a variety of channels. We engaged with local schools at school fetes, hosted community fun days, and organised dedicated HAF events. Flyers were distributed to schools and local businesses, while the programme was promoted through the Newham website, Newham Education Matters newsletter, and Head Teachers' KIT meetings to keep key local stakeholders informed. To further maximise outreach, we included a HAF flyer in the council tax mail-out to all residents.

Newham HAF has made it a priority to ensure the programme remains responsive to the diverse needs of its community. We gathered feedback from children and young people through the creation of the HAF Champions Group, while over 200 families provided their input via surveys through Survey Monkey. Based on the survey responses, several gaps or areas for improvement were identified.

While 89% said the booking system (Eequ) was straightforward, 11% of respondents found the online booking system difficult to use. To address this, we created a PowerPoint guide for providers to share with families, explaining how to change the language settings to their native language, improving accessibility. Additionally, we set up online meetings with providers to guide them through new features and offered focused training during the Kick-Off meetings to ensure all staff were well-equipped to assist families.

Some families also indicated that they were unfamiliar with how to raise feedback, with 21% expressing they did not know how. In response, we provided information stands for each provider, featuring key templates and resources to ensure families had clear instructions on how to give feedback. We also encouraged providers to share this information more prominently through their social media channels, increasing visibility and access for parents and caregivers.

While 86.82% of families rated the staff as supportive, we received feedback suggesting that children with special educational needs (SEN) required more tailored assistance. To address this, we delivered SEND-specific training to providers, equipping them with the skills and strategies to better support children with diverse learning and support needs. This ensured a more inclusive environment where children with SEN could fully participate in activities, with the right support structures in place.

Newham HAF remains dedicated to adapting and enhancing the programme to meet the evolving needs of its community. Through ongoing collaboration with families, providers, and local services, the programme continues to evolve, ensuring it provides meaningful, accessible, and inclusive activities that support the development and well-being of all FSM-eligible children and young people in Newham.

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