



London Borough of Haringey

2019 Childcare Sufficiency Assessment

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Introduction

The following Childcare Sufficiency Assessment presents an analysis of the supply and demand of childcare, along with parents' views on childcare in Haringey, as of 2019. Fundamentally, in 2019, the required research had a particular focus on the evolving 30 hours childcare offer and how its first 18 months of roll out was implemented.

Having sufficient childcare means that families are able to find childcare that meets their child's learning needs and enables parents to make a choice about work and training. This applies to all children from birth to age 14 and up to 18 for children with disabilities.

The strategic context for childcare sufficiency

The Childcare Act 2006 and 2016 requires local authorities in England to ensure sufficient childcare, where reasonably practicable, for working parents, parents studying or training and for children aged 0 –14 years (or up to 18 for disabled children). The duties in the act (Section 6) require local authorities to shape and support the development of childcare in their area in order to make it flexible, sustainable and responsive to the needs of the community. This role is described as a 'market management' function, supporting the sector to meet the needs of parents, children and young people, parents and stakeholders.

Under section 6 of the act there is a requirement on local authorities to produce an annual sufficiency report on the availability and sufficiency of childcare in their area. This information should be made available to parents and elected members. To meet section 6 duties, local authorities need to collect and publish information on the supply of provision and demand for childcare in their area. Statutory guidance provides clear indication of what must be included in the annual review, and what should be included.

Section 7 requires local authorities to secure prescribed early years provision free of charge. This provision is for children aged 2, 3 and 4 years of age.

Section 12 places a duty on local authorities to provide information, advice and assistance to parents and prospective parents relating to the provision of childcare, services or facilities that may be of benefit to parents and prospective parents, children and young people and publish information regularly.

Finally, the Childcare Act 2016 placed a subsequent duty on English Local Authorities to secure free sufficient childcare for the extended entitlement (30 hours).

Methodology

Four phases of research and analysis were undertaken to inform the report and the concluding gaps analysis section:

1. Providers Audit

A structured telephone survey was undertaken with Ofsted registered early years childcare providers and registered out of school childcare providers operating throughout the London Borough of Haringey, i.e. Private, Voluntary and Independent (PVI) sector nurseries and pre-school playgroups, maintained nursery classes, registered childminders, after school clubs, before school/breakfast clubs and holiday playschemes all participated.

A standard format of semi-structured interview questions invited the borough's childcare providers to feedback on issues *including*:

- Number of children *on roll* and *occupying* (pre-defined types of) childcare places
- Evolving impact(s) of the 30 hours childcare offer
- (Any differences in) demand observed for all three types of funded entitlements since the localised inception of the 30 hours childcare offer
- Support accessible to children with SEND
- Trends observed since the previous 2016 Childcare Sufficiency Assessment
- Considered needs in terms of support and advice from the local authority

2. Survey with Parents/Carers

In spring 2019, parents and carers who were resident within the London Borough of Haringey responded to three consultation approaches:

1. A core series of structured telephone interviews, which were undertaken by Premier Advisory Group's Sufficiency Projects Team
2. A series of fieldwork interviews – so as to ensure representation from parents and carers from all sections of the borough's diverse communities
3. An on-line survey, which enabled parents and carers to also feedback at their convenience

The on-line survey was promoted through the local authority's social media channels – including via their twitter feed. A sampling framework was developed to ensure (a) geographical coverage aligned to relative population levels in specific areas of the Haringey locality; (b) to ensure that families who were using formal childcare and who were not using formal childcare (at the time of the research) could provide their feedback; (c) to ensure coverage of key issues related to 2, 3 and 4 year olds who were accessing the three types of funded early years/childcare entitlements.

3. Identification of key demographic and socio-economic issues in Haringey

Structured desk research was undertaken in order to identify demographic and socio-economic factors which will have a *discernible influence* on the (sufficiency of and suitability of)

existing and future provision of early years childcare/funded entitlements and out of school childcare throughout the London Borough of Haringey locality and its 19 wards.

This desk research included a focus on:

- Population projections/forecasts for 2 year olds and 3 – 4 year olds
- Population projections/forecasts for over 5 year olds
- Birth rates since 2016 in order to help inform forthcoming potential demand for 30 hours childcare offer provision
- Migration data
- Incidence of working families (that could be eligible to take-up the 30 hours childcare offer) and average household incomes
- Incidence of children and young people from low income families
- Incidence of children with SEND
- Incidence of major new housing developments

4. Gaps Analysis and CSA Production

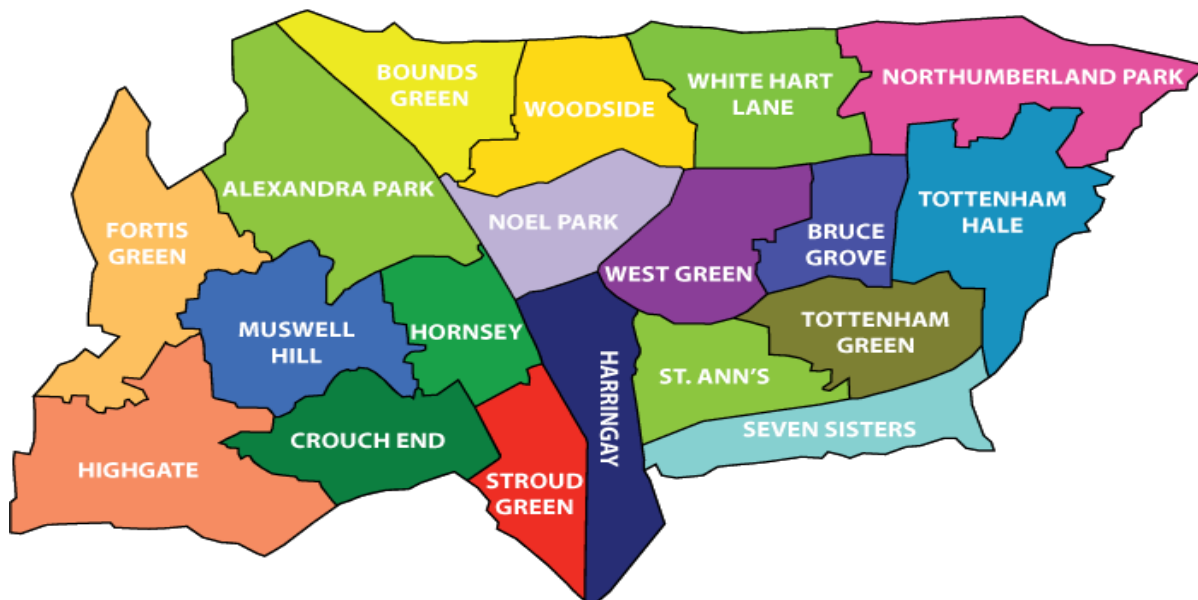
The following Childcare Sufficiency Assessment was produced in spring 2019. It has incorporated a gaps analysis – see pages 110 – 115 - which has a specific focus on short and medium term strategic priorities for childcare sufficiency planners at the London Borough of Haringey, with an additional focus on emerging localised features of the 30 hours childcare offer.

Acknowledgements

Premier Advisory Group gratefully acknowledges the support and cooperation of all the childcare providers involved with the assessment.

The consultation draws heavily on the views and experiences of parents and carers. Their contribution to the research and the sufficiency findings has been invaluable.

The Nineteen wards comprising the London Borough of Haringey



The six Network learning Communities comprising the London Borough of Haringey

There are six Network Learning Communities (NLCs) which have been used as the base for the Childcare Sufficiency Assessment: 1. Muswell Hill/Highgate; 2. Hornsey/Stroud Green; 3. Wood Green; 4. Haringay/West Green; 5. North East Tottenham; 6. South East Tottenham.



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Policy Context

Since the previous assessment, the Childcare Act 2016 has seen the introduction of tax free childcare and the extension of free entitlement for working families, in order to increase the access to affordable childcare for families.

Childcare planners in the London Borough of Haringey are aware that the report *Unlocking talent, fulfilling potential, A plan for improving Social Mobility through education*, introduced by the Department for Education in December 2017¹ has a key role to play in achieving the aims for young children in the following areas:

Ambition 1 – Close the ‘word gap’ in the early years. Good early years education is the cornerstone of social mobility. Children with strong foundations will start school in a position to progress, but too many children still fall behind early, and it is hard to close the gaps that emerge. There is a need to tackle these development gaps at the earliest opportunity, particularly focused on the key early language and literacy skills, so that all children can begin school ready to thrive.

Ambition 2 – Close the attainment gap in school while continuing to raise standards for all. The attainment gap between disadvantaged children and their more affluent peers is now closing. However, certain pupils still remain behind their peers at each key stage at school. There is a need to build on the many more good school places and the innovation unleashed by recent reforms, focusing on raising standards in the areas of the country where it is now most needed.

1

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/667690/Social_Mobility_Act_ion_Plan_-_for_printing.pdf

Childcare market in 2019 compared to last sufficiency assessment in 2016

When undertaking a comparative analysis of changes observed, in 2019, since the London Borough of Haringey's 2016 Childcare Sufficiency Assessment the following was observed:

Childminders

The number of childminders has decreased from 224 to c175 – 180, a net overall reduction of c45 – 50 which is in keeping with national trends. However, there has been a 35% increase in childminders offering the funded entitlement.

Private, Voluntary and Independent Settings

There has also been an increase in the number of PVI settings, since 2016, from 76 providers to 81 on the childcare register in 2019. However rising costs and static funding has had an impact on providers, especially pre-school/playgroups who are concerned about their viability for the future.

There are over 300 providers offering childcare places for 0 – 4 year olds and there are two large nursery chains delivering childcare in Haringey.

Out of school provision

There has been an increase in out of school provision since the previous CSA but the Borough still has a demand for places particularly in the 5 – 11 years age range.

Ofsted Gradings

The overall quality of provision has increased with the majority of childcare providers across the sector now judged as Good or Outstanding by Ofsted.

Take up of funded places – census comparison from January 2018 to January 2019

Figures on take up of the funded entitlements for 2, 3 and 4 year olds are provided by DfE on an annual basis are linked to the January census returns.

The January 2019 census indicated that take up in the London Borough of Haringey was 689 for 2 year old children, a decline from the previous census headcount data, for January 2018, which was 850 children.

Take up of 3 year olds increased from 2,770 in the January 2018 census to 2,882 in the January 2019 census. Take up of 4 year olds decreased from 3,080 in the January 2018 census to 3,022 in the January 2019 census. Take up of the 30 hours childcare offer increased from 1,130 codes issued in January 2018, to 1,277 codes issued in January 2019.

The January 2019 census indicated that there were 353 children who took up early years pupil premium – a reduction compared to the previous census of 430 children in January 2018.

SEND provision aligned to the Local Offer

The number of 2 year olds accessing the free entitlement for 2 year olds recorded with SEN support has increased: 47 children recorded in the January 2019, compared to 41 children in January 2018.

The number of funded 3 and 4 year olds that have SEN support has been increasing, from 422 in January 2018 to 481 in January 2019. Funded 3 and 4 year olds with an EHC plan had increased from 36 in January 2018 to 52 in January 2019.

Key Findings from 2019 CSA

- 1 Places for children under 2 are delivered by PVI settings and childminders, with the highest amount of places on offer in the Noel Park ward. Relevant vacancies, in the PVI sector, in 2019 evidently most frequently exist in the wards of Woodside and Bruce Grove.

Conversely, analysis of waiting lists for this age group indicates that there is a notable demand for places, in the PVI sector, in the wards of West Green and Fortis Green.

- 2 The highest number of resident 2 year olds are living in the following three (neighbouring, eastern) wards of the London Borough of Haringey: Seven Sisters, Tottenham Hale and Northumberland Park. Places for 2 year old children are delivered by PVI settings, childminders and maintained nursery classes. Via these three types of providers, there are c2,500 places accessible. There are however a relatively high level of vacancies amongst PVI settings for 2 year olds in the South East Tottenham Network Learning Community wards of Tottenham Hale and Bruce Grove. In contrast the three wards which accounted for the highest number of *eligible* 2 year olds in early 2019 were: Seven Sisters, Northumberland Park and White Hart Lane.
- 3 The highest number of 3 and 4 year olds are resident in the three wards of Seven Sisters, Tottenham Hale and Northumberland Park. Additionally those three wards account for the highest birth rates, in 2016. Universal 15 hours free entitlement places for 3 and 4 year olds are delivered by PVI settings, childminders and maintained nursery classes. There are c3,250 places delivered with a majority of the places from the PVI settings and the maintained nursery classes. There are a number of relatively high waiting lists for some private sector nurseries in Highgate and Muswell Hill wards for 3 and 4 year olds – and a relatively high level of vacancies within the Harringay and West Green wards for all PVI sector providers.
- 4 30 hours childcare offer places for 3 and 4 year olds are delivered by PVI settings, childminders and maintained nursery classes. There are c1,150 places delivered with a majority of the places accessible from the PVI settings. There are a relatively high level of vacancies within the Bounds Green and Seven Sisters wards for all PVI sector providers.

5 The Providers Audit for the 2019 Childcare Sufficiency Assessment indicated that there is little childcare available across the weekends. Most setting open by 8.00am on weekdays and stay open until 6.00pm.

6 The highest number of 5 – 14 year olds are resident (in order of frequency) in the following three wards (in the eastern vicinity of the borough): Seven Sisters ward, Northumberland Park ward, Tottenham Hale ward.

As is a London-trend, the resident population of older school-aged children is forecast to increase at a greater rate than the population of young (pre-school aged) children. Indeed the Office of National Statistics (as with other north London borough's) forecast a decrease in the population of children aged 3 – 4 years and children aged 2 year olds up to 2025 – see Table 4, page 21.

7 The following three wards account for the highest frequency of adults in employment – and it can therefore be assumed *working families*: Harringay, Crouch End and St Ann's. The following three wards account for the *lowest* frequency of adults not in work: Tottenham Green, Tottenham Hale and Northumberland Park (which has the highest unemployment rates in the borough).

8 As with the majority of London borough's, a particular locality of the borough has been designated as a Mayor's Housing Zone – in this case the Tottenham vicinity, which via the Tottenham 'zone' and the North Tottenham 'zone' will eventual yield a combined total of 2,565 new dwellings, incorporating the Hale Village site. Essentially, new homes and new employment opportunities will increase demand for childcare.

9 The 2019 CSA Providers Audit indicated a number of valuable and informative intelligence about Haringey's childcare market. For example, on the subject of 2 year olds, all applicable early years childcare providers/settings and registered childminders were asked: *How would a reduction in the 2 year old free entitlement funding rate affect your ability to provide such provision?*

- 21% of applicable PVI settings stated: it would make no difference
- 79% of applicable PVI settings stated: we might have to reduce the number of places we offer. 100% of such settings provided this response in the Hornsey/Stroud Green Network Learning Community

- 0 of applicable maintained nursery classes stated: it would make no difference
- 100% of applicable maintained nursery classes stated: we might have to reduce the number of places we offer

- 39% of applicable registered childminders stated: it would make no difference
- 61% of applicable registered childminders stated: we might have to reduce the number of places we offer – and were most frequently located in the Haringey/West Green Network Learning Community

On the emerging subject of the 30 hours childcare offer, 84% of respondent early years childcare providers stated that they were offering 30 hours and the three wards that accounted for the highest number of places offered were Noel Park, Woodside and Fortis Green.

PVI settings with the highest *take up* of 30 hours places were in Noel Park, Fortis Green and Woodside ward.

Maintained nursery classes/schools had the highest take up in the following three wards, White Hart Lane, St Ann's and West Green.

Childminders had the highest take up in the following three wards, Noel Park, Woodside and St Ann's.

All *responding* and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes/nursery schools – and (b) registered childminders were requested to outline what they believed (any) key challenges had been in terms of their implementation and delivery of the 30 hours childcare offer in its first year of *full* national roll-out, including across the London Borough of Haringey. The most frequent statement was (words to the effect): *“The initial issuing of eligibility codes and the system of reconfirmation”*.

For example, specific feedback included:

“We spend so much time chasing parents about re-confirmation”.

“The need to chase parents for their eligibility codes is very time consuming”.

“We see many parents who do not understand the eligibility process”.

The second most frequent statement was (words to the effect): *“the [hourly] funding rate per child should be higher”*. For example, specific feedback included:

“We have had parents come to us and expect the place to be delivered and all totally for free”.

The third most frequent statement was (words to the effect): *“the [hourly] funding rate per child should be higher”*. (Indeed, such feedback was provided by 1 : 5 applicable registered childminders, including those that were delivering the 30 hours childcare offer in 2019).

By a significant margin, the most frequent barrier that early years (funded) childcare providers reported that – in their experience – parents had faced during the first 18 months of roll-out of the 30 hours childcare offer was: problems and complications associated with receiving an eligibility code, which could deter parents or make them unenthusiastic to follow up on initial interest.

In terms of the childminding sector, 20% of responding registered childminders stated that they did not anticipate being in business in 3 years time – a percentage that was aligned to ‘natural churn’, as evidenced by average national percentages.

All responding early years childcare providers/settings and registered childminders were requested to outline whether, during the period 2016 – 2019, they had witnessed any *notable* (and new) trend(s) – including in terms of the circumstances of and backgrounds of families accessing their provision.

46% of PVI settings responded that since 2016, they *had* witnessed a *notable* trend(s). The three most frequent types of trends stated by early years childcare providers/settings were (in order of frequency):

1. Receipt of more “*enquiries*” for places for babies
2. An increased incidence of parents saying that they are unable to afford fees
3. An evolving demand for the 30 hours childcare offer

57% of maintained nursery classes responded that since 2016, they *had* witnessed a *notable* trend(s). The five most frequent types of trends stated by early years childcare providers/settings were (in order of frequency):

1. An increased demand for longer/extended hours of care
2. An increased demand for full-time hours of care
3. An evolving demand for the 30 hours childcare offer

45% of registered childminders responded that since 2016, they had witnessed a *notable* trend(s).

The three most frequent types of trends stated by registered childminders were:

1. An *decreased* demand – in general – including for funded entitlement places
2. We are aware of more parents preferring to access setting-based early years childcare
3. An increased demand for longer/extended hours of care

In terms of the out of school childcare sector, 55% of after school clubs responded that since 2016, they *had* witnessed a *notable* trend(s).

The three most frequent types of trends stated by such providers/settings were (in order of frequency):

1. Generally demand has increased
2. A higher incidence of *working* parents are enquiring about a place
3. Parents with zero hours contracts require more flexibility

34% of breakfast clubs responded that since 2016, they *had* witnessed a *notable* trend(s). The three most frequent types of trends stated by such providers/settings were (in order of frequency):

1. Generally demand has increased
2. A higher incidence of parents requesting a pre-8am opening time
3. More requests to take 3 year old children

33% of holiday playschemes responded that since 2016, they *had* witnessed a *notable* trend(s). The two most frequent types of trends stated by such providers/settings were (in order of frequency):

1. A higher incidence of parents who struggle to afford fees
2. A discernible increase in demand from carers of children with SEND

Finally, *all* responding (a) early years childcare providers/settings and (b) registered childminders and (c) out of school childcare providers were asked what they considered were the key challenges that the early years childcare sector in the London Borough of Haringey faces in terms of providing suitable and quality childcare for carers/parents

and their children with SEND? The most frequent response was (words to the effect): “Difficulties in securing funding for additional SEND support”.

The second most frequent response was (words to the effect, especially from registered childminders): “Physical access issues – including for wheelchair using young children”.

The third most frequent response was (words to the effect): “Difficulties in finding settings where a professional/a childminder is appropriately trained”.

- 10 The 2019 CSA Parents/Carers survey accounted for 744 responses and also indicated a number of valuable and informative intelligence about Haringey’s childcare market. Table 1 below shows the number of responding parents/carers who were raising children who were of specific ages:

Table 1 - Percentages of parents who stated a particular scenario aligned to them having at least one child aged 0 – 4 years and/or one child aged 5 – 19 years

Scenario	Number Those with at least one 0 – 4 year old	Percentage Those with at least one 0 – 4 year old	Those with at least one 5 – 17 year old	Percentage Those with at least one 5 – 17 year old
Scenario 1= Use Formal registered childcare only	273	52%	86	38%
Scenario 2 = Use Formal registered and Informal unregistered childcare	43	8%	17	7.5%
Scenario 3 = Do not use any Formal registered childcare, but may use Informal unregistered childcare	203	39%	122	54%

In terms of the evolving 30 hours childcare offer, 4 out of 10 parents of 3 and 4 year olds who responded to the 2019 Childcare Sufficiency Assessment Parents/Carers Survey were in early 2019 accessing a 30 hours childcare offer place.

Approximately 60% of such parents were not accessing a 30 hours childcare offer place at that time. Of the responding parents who were accessing the 30 hours childcare offer in early 2019, 80% stated that doing so had helped themselves or a partner to remain in work/employment. Where parents were accessing 30 hours they most frequently lived in the west of the borough.

The most frequent incidence of the statement: *I am not accessing the 30 hours childcare in early 2019 because I think that I am not eligible* was made observed from respondents who were resident in the Tottenham locality.

In terms of the question: *If you were to use the 30 hour childcare offer in the future, where do you think the main place you would use it would be?* – a PVI setting was denoted by applicable responding parents/carers with the highest frequency.

In terms of the question: *Why are you not accessing the universal 15 hours free entitlement for 3 and 4 year olds?* – the most frequent response was (words to the effect): *“because I am now accessing the 30 hours childcare offer”*.

In terms of the question: *Why are you not accessing the free entitlement for 2 olds?* – the most frequent response was (words to the effect): *“because I am not eligible”*, and this response was most frequently stated by parents/carers who were resident in the west of the borough.

Finally, parents/carers who were accessing at least one type of free entitlement were asked: What times of (a typical week) day would you prefer to use a free, funded entitlement, early learning and childcare place?

The most frequent response was 8am – 6pm (42% of applicable parents), followed in frequency by: half day, either morning or afternoon (27% of applicable parents).

The response 8am – 6pm was most frequently stated by applicable parents who were resident in the following wards, Bruce Grove, Seven Sisters, Tottenham Green and Tottenham Hale.

1 Demand for childcare

This Section 1 of the 2019 Haringey Childcare Sufficiency Assessment focuses on the demand for early years childcare and out of school childcare aligned to three types of analysis/feedback:

- a) Key demographic factors that affect the borough's early years and childcare market;
- b) (Demand themed) Outcomes/feedback from a Providers Audit
- c) (Demand themed) Outcomes/feedback from a Parents/Carers Survey

a) Demand analysis – Key Demographic Factors affecting the childcare market

The following section presents an analysis which focuses on how demographic and socio-economic factors may affect forthcoming localised demand for childcare places, and the three types of funded early years entitlements.

The data sets and relevant metrics are aligned to the borough's 19 wards and its six Network Learning Communities² – including:

- Existing 0 – 14 years populations and projections/forecasts
- Birth rates since 2015 and 2016 in order to help inform forthcoming potential (demographic) demand for 30 hours childcare offer provision
- Migration data
- Incidence of working families (that are eligible to take-up the 30 hours childcare offer) and average household incomes
- Incidence of children and young people from low income families
- Incidence of children with SEND
- Incidence of major new housing developments

A key objective of the following narrative and analysis is to consider the extent to which *childcare planners* within the borough may need to (continue to) prioritise its abilities to help instigate/stimulate *further* 30 hours childcare places/provision within specific/targeted geographical localities.

1.1 Haringey in context

1.1.1 The London Borough of Haringey's population is increasing. It is a highly diverse population with 67% residents identifying as non-white British ethnic groups, White Other (29%), Black (17%), Asian (9%), Mixed (7%). There are over 180 languages spoken in the borough. Nearly one in five of the population is aged 0 – 17 years of age. Additionally the borough is the 7th most deprived authorities in London. Unemployment is relatively higher than London, 19.8 compared to 5.4 (APS 2017). However, the local

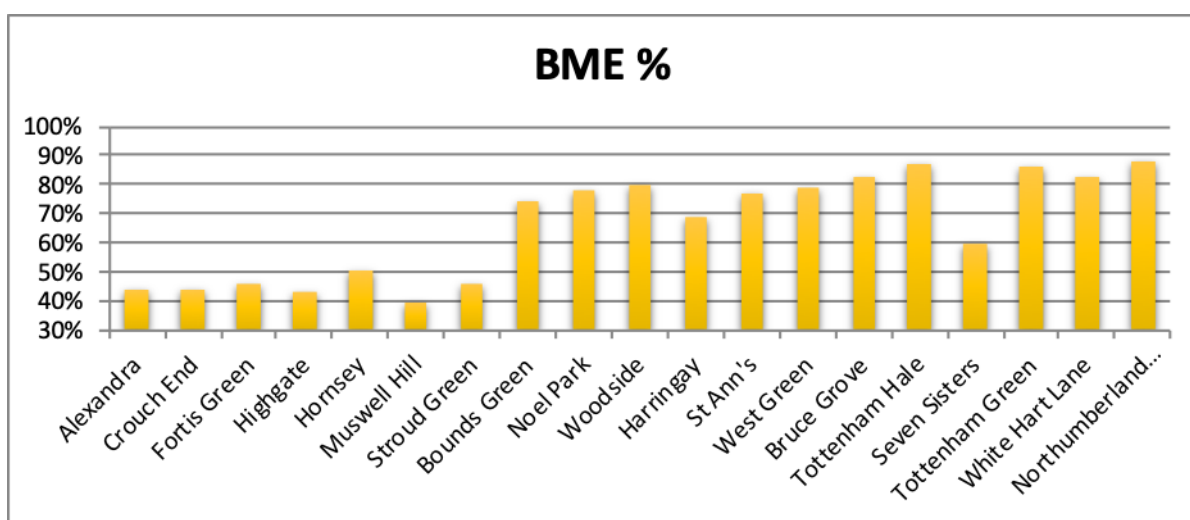
² <https://www.haringey.gov.uk/children-and-families/schools-and-education/projects-consultations-and-inspections/networked-learning-communities-nlc>

authority has ambitious plans for housing and employment growth, with a focus on the Tottenham locality.

The most highly populated wards of 0 – 4 year olds are in the east of the borough with Northumberland Park and Seven Sisters wards accounting for the highest population of such children.

The west of the borough has the highest concentration of White British 0 – 4 years in the borough with Alexandra, Crouch End and Fortis Green wards having particularly high cohorts. The east of the borough has a high concentration of BME families with the Northumberland Park, Tottenham Green and Tottenham Hale wards accounting for the highest numbers:

Diagram 1 - Percentage of resident 0 – 4 year olds from Black and Minority Ethnic communities (BME) aligned to Haringey ward (source: NOMIS 2017)



The table overleaf indicates a further metric breakdown, via the Office of National Statistics (2011) of the ethnicity of children and young people resident in the London Borough of Haringey.

Ethnic Group	Alexandra	Bounds Green	Bruce Grove	Crouch End	Fortis Green	Harringay	Highgate	Homsey	Muswell Hill	Noel Park	Northumberland Park	Seven Sisters	St Ann' s	Stroud Green	Tottenham Green	Tottenham Hale	West Green	White Hart Lane	Woodside
All Categories: Ethnic group	860	922	1,125	815	829	853	694	806	633	875	1,333	1,464	1,004	705	1,083	1,231	854	1,009	1,017
White: English/Welsh/Scottish/Northern Irish	477	232	198	458	445	265	391	397	382	188	162	588	232	379	148	158	181	171	201
White: Irish	9	9	3	13	15	7	4	9	6	3	2	3	4	12	2	5	2	8	14
White: Gypsy or Irish Traveller	0	0	5	0	0	2	0	2	0	2	2	1	7	0	6	6	2	4	6
White: Other White	124	236	216	102	121	156	100	98	87	185	265	316	192	97	243	227	187	203	246
Mixed/multiple ethnic group: White	38	47	51	14	22	30	29	26	22	61	76	25	39	23	60	73	34	39	42
Mixed/multiple ethnic group: White	18	32	28	23	12	29	6	12	10	20	53	13	38	12	29	42	29	23	22
Mixed/multiple ethnic group: White	73	39	17	57	49	36	52	44	57	27	12	28	22	23	38	24	25	33	39
Mixed/multiple ethnic group: Other	34	45	64	64	40	56	52	42	25	43	49	38	55	33	38	43	54	44	57
Asian/ Asian British: Indian	12	23	17	9	17	8	8	4	9	16	8	13	15	1	5	13	8	7	29
Asian/Asian British: Pakistani	5	8	7	6	3	9	4	4	1	7	7	3	11	1	4	14	9	11	19
Asian/Asian British: Bangladeshi	4	20	41	2	3	43	1	9	2	31	25	27	52	6	32	30	29	40	47
Asian/Asian British: Chinese	6	10	22	4	11	13	6	5	3	26	17	21	16	9	27	24	20	14	22
Asian/Asian British: Other Asian	6	26	35	18	20	27	0	15	0	33	42	22	32	8	26	27	19	34	27

Table 2 - Numbers of children and young people from specific ethnicities that are resident in the London Borough of Haringey (source: ONS 2011)

- 1.1.2 The 2018 Haringey School Places Planning Report highlighted a projected increase in the 0 – 3 years populations in wards in the east of borough – including in the Northumberland Park ward and the Tottenham locality.
- 1.1.3 Table 2 indicates the number of children estimated to be resident in each of the London Borough of Haringey's 19 wards and its six Network Learning Communities– as per ONS estimates for 2017 – aligned to the following age groups: (a) 0 – 4 years (b) 5 – 9 years (c) 10 – 14 years.

Table 3 - Approximate number of children and young people aged 0 – 14 years resident in each of the London Borough of Haringey's 19 wards in 2018
(source: Office of National Statistics 2017)

Ward	Number of Resident 0 – 14 year olds	Number of Resident 0 - 4 year olds	Number of Borough's Resident 5 – 9 year olds	Number of Resident 10 - 14 year olds	Percentage of Borough's Resident 0 - 14 Year olds
Muswell Hill/Highgate Network Learning Community					
Alexandra	2,541	781	919	841	4.9%
Fortis Green	2,550	826	846	878	4.9%
Highgate	1,826	740	520	566	3.5%
Muswell Hill	1,893	634	682	577	3.7%
Total NLC	8,810	2,981	2,967	2,862	17%
Hornsey/Stroud Green Network Learning Community					
Crouch End	2,052	845	704	503	4%
Hornsey	2,280	963	721	596	4.4%
Stroud Green	1,753	720	496	537	3.4%
Total NLC	6,085	2,528	1,921	1,636	11.8%
Wood Green Network Learning Community					
Bounds Green	2,708	1,072	866	770	5.2%
Noel Park	2,616	956	842	818	5.1%
Woodside	2,826	1,087	893	846	5.5%
Total NLC	8,150	3,115	2,601	2,434	15.5%
Harringay/West Green Network Learning Community					
Harringay	2,122	950	654	518	4.1%
St. Ann's	2,626	1,026	844	756	5.1%
West Green	2,496	930	833	733	4.8%
Total NLC	7,244	2,906	2,331	2,007	14%
North East Tottenham Network Learning Community					
Northumberland Park	4,048	1,441	1,313	1,294	7.8%
White Hart Lane	2,937	935	943	1,059	5.7%
Total NLC	6,985	2,376	2,256	2,353	13.5%
South East Tottenham Network Learning Community					
Bruce Grove	2,944	1,035	984	925	5.7%
Seven Sisters	4,529	1,554	1,590	1,385	8.8%
Tottenham Green	3,073	1,205	946	922	5.9%
Tottenham Hale	3,771	1,293	1,252	1,226	7.3%
Total NLC	14,317	5,087	4,772	4,458	27.7%
Total Haringey	51,588	18,990	16,848	15,750	100%

Table 3 indicates that the highest number of 0 – 4 year olds are evidently resident (in order of frequency) in the following three wards (in the eastern vicinity of the borough):

1. Seven Sisters ward
2. Northumberland Park ward
3. Tottenham Hale ward

The lowest number of 0 – 4 year olds are evidently resident (in order of frequency) in the following three wards (in the western vicinity of the borough):

1. Muswell Hill ward
2. Stroud Green ward
3. Highgate ward

Table 3 also indicates that the highest number of 5 – 9 year olds are evidently resident (in order of frequency) in the following three wards (in the eastern vicinity of the borough):

1. Seven Sisters ward
2. Northumberland Park ward
3. Tottenham Hale ward

The lowest number of 5 – 9 year olds are evidently resident (in order of frequency) in the following three wards (in the western vicinity of the borough):

1. Highgate ward
2. Harringay ward
3. Muswell Hill ward

Finally, Table 3 indicates that the highest number of 10 – 14 year olds are also evidently resident (in order of frequency) in the following three wards:

1. Seven Sisters ward
2. Tottenham Hale ward
3. Northumberland Park ward

The lowest number of 10 – 14 year olds are evidently resident (in order of frequency) in the following three wards (in the western vicinity of the borough):

1. Crouch End ward
2. Stroud Green ward
3. Highgate ward

- 1.1.4 Table 4 below indicates that the population of older school-aged children in the borough is forecast to increase at a greater rate than the population of young (pre-school aged) children. However projected demand for school places (Spring 2019 data) indicates a general fall due to the fall in birth rates during 2017 and 2018.

Table 4 - Numbers of children forecast to be resident in the London Borough of Haringey by 2025 (source: Office of National Statistics 2016)

Age cohort	Resident Population 2018	Resident Population 2021	Number change 2018 – 2021	Resident Population 2025	Number change 2018 – 2025
0 – 1 years	7,758	7,810	52	7,709	-49
2 years	3,784	3,703	-81	3,659	-125
3 – 4 years	7,388	7,072	-316	7,050	-338
5 – 7 years	23,680	24,232	+552	23,879	+199
8 – 11 years	21,730	22,528	+798	23,418	+1,688
12 – 18 years	64,340	65,345	+1,005	65,715	+1,375
Total 0 – 18	7,758	7,810	+52	7,709	-49

1.2 Birth rates in the London Borough of Haringey

The 2018 Haringey School Places Planning Report outlined that since 2002 the number of births in the west of the borough had fallen from 1,135 (2002) to 1,073 (2016).

This contrasted with births in the east of the borough that had risen from 2,596 (2002) to 3,041 (2016).

Table 5 presents the number of live births that were recorded in the London Borough of Haringey in the years 2015 and 2016, in each of its nineteen wards.

Table 5 - Birth rates in the London Borough of Haringey in 2015 and 2016 (ONS 2019)

Ward	Live births in 2015	Live births in 2016
Network Learning Community: Highgate/Muswell Hill		
Alexandra	133	112
Muswell Hill	128	119
Fortis Green	146	131
Highgate	131	131
Total NLC	538	493
Network Learning Community: Hornsey/Stroud Green		
Crouch End	152	196
Hornsey	182	216
Stroud Green	149	168

Total NLC	483	580
Ward	Live births in 2015	Live births in 2016
Network Learning Community: Wood Green		
Bounds Green	213	206
Noel Park	217	221
Woodside	285	229
Total NLC	715	656
Network Learning Community: Harringay/West Green		
Harringay	245	217
St. Ann's	237	236
West Green	209	191
Total NLC	691	644
Network Learning Community: North East Tottenham		
Northumberland Park	322	332
White Hart Lane	208	207
Total NLC	530	539
Network Learning Community: South East Tottenham		
Bruce Grove	278	273
Seven Sisters	324	355
Tottenham Green	249	290
Tottenham Hale	298	284
Total NLC	1,149	1,202
Total Haringey	4,106	4,114

Table 5 indicates that the following three wards within the (eastern vicinity of the) borough had the highest birth rates, in 2015 and 2016 – i.e. proportions of resident children (closing in on) children eligible for a funded childcare place:

1. Seven Sisters ward
2. Northumberland Park ward
3. Tottenham Hale ward

1.3 Migration

Table 6 demonstrates the apparent trend for the London Borough of Haringey in terms of *international* migration inflows and outflows and *internal* (within the UK) migration inflows and outflow.

Table 6 - London Borough of Haringey (a) international migration and (b) internal migration inflows and outflows trends observed since 2012 – 2013 up to 2016 – 2017 (source: ONS 2018)

Year	2012 – 2013	2013 – 2014	2014 – 2015	2015 – 2016	2016 – 2017
International Migration					
Inflows					
Haringey	6,766	8,230	8,259	7,840	7,480
Outflows					
Haringey	3,266	3,455	3,053	3,582	4,460
Net migration churn	3,500	4,775	5,206	4,258	3,020
Internal Migration					
Inflows					
Haringey	19,699	20,626	20,746	21,313	22,469
Outflows					
Haringey	23,191	25,038	24,979	24,701	29,113
Net migration churn	-3,492	-4,409	-4,233	-3,388	-6,644

Table 6 indicates that in terms of international migration, there is a surplus of *inward* flow, indeed at an accelerating rate. However in terms of people who are already resident in the UK, more were moving out of the locality than were moving in. The trend however – which is observable within other North London boroughs – is that (the greater level of overall) inward migration is – in all probability – including a tangible number of young families – including those for whom English is not the first language spoken in the home.

1.4 Employment

Economic inactivity refers to people who are neither in work nor employed. This group includes, for example, those looking after a home or retired. Economic inactivity rates in Haringey are higher than found across London and GB as a whole, and of the working age population that is economically inactive, a lower percentage want a job:

Table 7 - Economic inactivity rates April 2018 – March 2019 (source: NOMIS 2019)

Circumstance	Haringey	London	UK
All people economically active	77.2%	78.1%	78.7%
All people economically inactive	22.8%	21.9%	21.3%
Wanting a job	15.6%	20.8%	20.6%
Not wanting a job	84.4%	79.2%	79.4%

In London a higher proportion of employee jobs are full-time (approximately three-quarters) but in Haringey it is 65.7%. Correspondingly, there are a higher proportion of part-time jobs in the borough, compared to the rest of London – see Table 8.

Table 8 - Employee jobs (2017) (source: NOMIS 2019)

Indicator	Haringey	London	UK
Total employee jobs	70,000	n/a	n/a
Full-time	65.7%	73%	67.5%
Part-time	34.3%	27%	32.5%

Table 9 (overleaf) indicates that the following three (south-central locality, Haringey/West Green Network Learning Community) wards account for the highest frequency of adults in employment – and it can therefore be assumed *working families*:

1. Harringay ward
2. Crouch End ward
3. St. Ann's ward

Table 9 - Incidence of employment and unemployment in the London Borough of Haringey's wards (NOMIS 2018 using ONS 2011 data)

Ward	Economically Active	Unemployed
Network Learning Community: Highgate/Muswell Hill		
Alexandra	6,561	372
Muswell Hill	6,247	325
Fortis Green	6,828	405
Highgate	7,039	335
Total NLC	26,675	1,437
Network Learning Community: Hornsey/Stroud Green		
Crouch End	7,942	405
Hornsey	7,452	699
Stroud Green	7,479	497
Total NLC	22,873	1,601
Network Learning Community: Wood Green		
Bounds Green	7,622	800
Noel Park	7,258	876
Woodside	7,800	808
Total NLC	22,680	2,484
Network Learning Community: Harringay/West Green		
Harringay	8,088	684
St. Ann's	7,871	833
West Green	6,842	853
Total NLC	22,801	2,370
Network Learning Community: North East Tottenham		
Northumberland Park	6,115	1,201
White Hart Lane	5,584	858
Total NLC	11,699	2,059
Network Learning Community: South East Tottenham		
Bruce Grove	7,097	905
Seven Sisters	7,516	845
Tottenham Green	7,462	1,083
Tottenham Hale	6,842	1,026
Total NLC	28,917	3,859
Total Haringey	135,645	13,810

Table 10 presents the average income in the London Borough of Haringey's 19 wards as published by the Greater London Authority in July 2015.

Table 10 - Average annual household incomes in the London Borough of Haringey's 19 wards (source: Greater London Authority in July 2015)

Ward	Average annual household incomes
Network Learning Community: Highgate/Muswell Hill	
Alexandra	£51,450
Fortis Green	£49,950
Highgate	£53,710
Muswell Hill	£53,910
Average NLC	£52,255
Network Learning Community: Hornsey/Stroud Green	
Crouch End	£52,070
Hornsey	£40,260
Stroud Green	£44,780
Average NLC	£45,703
Network Learning Community: Wood Green	
Bounds Green	£34,550
Noel Park	£30,620
Woodside	£32,010
Average NLC	£32,393
Network Learning Community: Harringay/West Green	
Harringay	£37,150
St. Ann's	£32,460
West Green	£31,110
Average NLC	£33,573
Network Learning Community: North East Tottenham	
Northumberland Park	£25,090
White Hart Lane	£27,010
Average NLC	£26,050
Network Learning Community: South East Tottenham	
Bruce Grove	£30,340
Seven Sisters	£33,500
Tottenham Green	£28,920
Tottenham Hale	£27,340
Total NLC	£30,025
Average for the London Borough of Haringey	£37,696

Table 10 indicates that the three wards which accounted for the *highest* average household incomes were (situated in the south west of the borough, Highgate/Muswell Hill Network Learning Community and) were:

1. Muswell Hill ward
2. Highgate ward
3. Crouch End ward

Table 10 indicates that the three wards which accounted for the *lowest* average household incomes were (situated in the North East of the borough/North East Network Learning Community) were:

1. Northumberland Park ward
2. White Hart Lane ward
3. Tottenham Hale ward

1.5 Incidence of children and young people from low income families

1.5.1 In 2015, 12 of the London Borough of Haringey's 19 wards were within the most deprived 20% in England.

They are located predominantly in the east of the borough. Indeed in 2015, Northumberland Park ward was among the 2 – 3% most deprived nationally. Table 11 indicates that the four wards which accounted for the highest proportions of children aged under 16 years who were members of low income families in 2014 (were situated predominantly in the north-central vicinity of the borough and) were:

1. White Hart Lane
2. Northumberland Park
3. West Green
4. Noel Park

Table 11 - Percentage of (under 16 years) children from low income families
(Source: HMRC Children in Poverty for Boroughs and Wards in London 2014)

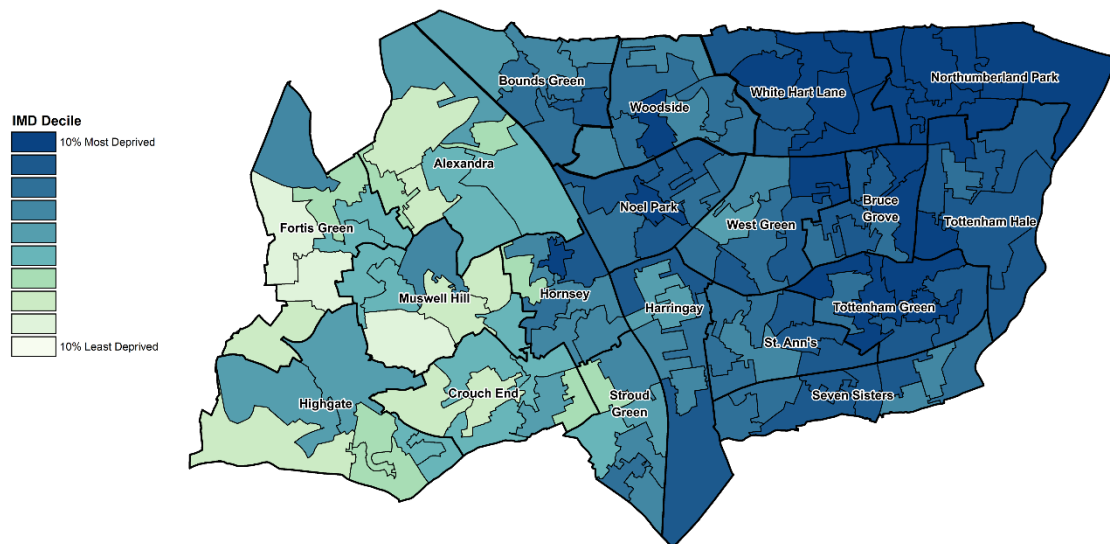
Ward	Number of children in families in receipt of Child Tax Credit (<60% median income) or IS/JSA	Number of children in Child Benefit families	Percentage of children from low-income families
Network Learning Community: Highgate/Muswell Hill			
Alexandra	625	2,580	24.1%
Fortis Green	460	2,100	21.8%
Highgate	560	2,195	25.4%
Muswell Hill	860	2,570	33.4%
Network Learning Community: Hornsey/Stroud Green			
Crouch End	260	2,495	10.4%
Hornsey	140	1,655	8.5%
Stroud Green	1,135	3,195	35.5%
Network Learning Community: Wood Green			
Bounds Green	1,035	3,415	30.2%
Noel Park	1,425	3,965	36%
Woodside	625	2,580	24.1%
Network Learning Community: Harringay/West Green			
Harringay	385	1,750	22.1%
St. Ann's	1,025	4,995	20.5%
West Green	1,365	3,480	39.2%
Network Learning Community: North East Tottenham			
Northumberland Park	1,455	3,230	45.1%
White Hart Lane	1,050	2,135	49.2%

Network Learning Community: South East Tottenham			
Bruce Grove	165	1,830	9.1%
Seven Sisters	340	1,705	19.8%
Tottenham Green	1,490	4,305	34.6%
Tottenham Hale	865	2,695	32.1%

Diagram 2 below, is based on the Income Deprivation Affecting Children Index (IDACI) which measures the proportion of all children aged 0 – 15 living in income deprived families within the London Borough of Haringey.

Diagram 2 – Proportion of all children aged 0 – 15 living in income deprived families within the London Borough of Haringey

Indices of Multiple Deprivation by Decile



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The Income Deprivation Affecting Children Index is the official measure of relative deprivation for small areas (or neighbourhoods) in England. It ranks every small area in England from 1 (most deprived area) to 32,844 (least deprived area). Haringey ranks as 21st most deprived borough in England and the 7th most deprived in London. The most deprived areas in Haringey are situated to the east of the borough – notably the wards of White Hart Lane, Northumberland Park, Bruce Grove and Tottenham Hale.

- 1.5.2 Since April 2015, childcare providers delivering the 15 hours universal free entitlement for 3 and 4 year olds have been able to apply for additional funding of up to £302.10 per year, per eligible child, to support households on lower income. Rates of take up were 353 in January 2019 census. In terms of the locations of such households, Table 12 shows the number of children living in Out-of-work Benefit Claimant Households by ward and Network Learning Community.

Table 12 - Number of children living in Out-of-work Benefit Claimant Households by ward and Network Learning Community (source: London Borough of Haringey 2019)

Ward	Age 0 – 4yrs (May 2017) ³
Network Learning Community: Highgate/Muswell Hill	
Alexandra	40
Fortis Green	50
Highgate	15
Muswell Hill	10
Average NLC	115
Network Learning Community: Hornsey/Stroud Green	
Crouch End	40
Hornsey	105
Stroud Green	65
Average NLC	210
Network Learning Community: Wood Green	
Bounds Green	120
Noel Park	155
Woodside	275
Average NLC	550
Network Learning Community: Harringay/West Green	
Harringay	125
St. Ann's	165
West Green	165
Average NLC	455
Network Learning Community: North East Tottenham	
Northumberland Park	360
White Hart Lane	175
Average NLC	535
Network Learning Community: South East Tottenham	
Bruce Grove	230
Seven Sisters	170
Tottenham Green	275
Tottenham Hale	265
Total NLC	940

³ Source: <https://www.gov.uk/government/statistics/children-in-out-of-work-benefit-households-31-may-2017>

1.5.3 The metrics detailed in Table 12 above follow the same trends as the other ‘deprivation’ indicators, with a clear contrast between east and west of the borough – as do the metrics presented in Table 13 which show the number of 0 – 4 year olds living in temporary accommodation, in the borough, at March 2019.

Table 13 - Number of 0 – 4 year olds living in temporary accommodation, in the borough, at March 2019 (source: Homes for Haringey, March 2019)

Ward	Count of 0 – 4 year olds
Network Learning Community: Highgate/Muswell Hill	
Alexandra	1
Fortis Green	31
Highgate	3
Muswell Hill	9
Average NLC	44
Network Learning Community: Hornsey/Stroud Green	
Crouch End	4
Hornsey	20
Stroud Green	12
Average NLC	36
Network Learning Community: Wood Green	
Bounds Green	28
Noel Park	20
Woodside	39
Average NLC	87
Network Learning Community: Harringay/West Green	
Harringay	23
St. Ann’s	68
West Green	51
Average NLC	142
Network Learning Community: North East Tottenham	
Northumberland Park	145
White Hart Lane	27
Average NLC	172
Network Learning Community: South East Tottenham	
Bruce Grove	54
Seven Sisters	25
Tottenham Green	88
Tottenham Hale	71
Total NLC	238

It can be noted that there is a relatively high number of homeless households, with 0 – 4 year olds, in Northumberland Park ward compared to the other wards in the east of the borough.

1.6 Education

- 1.6.1 Table 14 shows the percentage of pupils achieving *Good Level of Development* at the end of Early Years Foundation Stage, by ward, in 2018. The Table, shows a disparity in attainment can be observed when comparing the east of the borough with the west of the borough where more families have English as an additional language and there are more children with Special Educational Needs.

Table 14 - Percentage of pupils achieving a good level of development at the end of Early Years Foundation Stage by ward (source: GDL 2018)

Wards	Numbers of pupils							
	All	Girls	Boys	FSM	Not FSM	EAL	SEN	BME
Network Learning Community: Highgate/Muswell Hill								
Alexandra	141	74	67	5	136	132	12	79
Fortis Green	154	69	85	9	145	144	9	80
Highgate	61	34	27	1	60	52	4	24
Muswell Hill	94	42	52	1	93	87	5	43
Network Learning Community: Hornsey/Stroud Green								
Crouch End	110	50	60	3	107	101	8	51
Hornsey	125	64	61	12	113	122	13	71
Stroud Green	71	37	34	5	66	69	6	39
Network Learning Community: Wood Green								
Woodside	126	59	67	14	112	123	7	108
Bounds Green	133	66	67	11	122	133	14	107
Noel Park	135	62	73	27	108	133	19	111
Network Learning Community: Harringay/West Green								
Harringay	116	61	55	10	106	109	8	58
West Green	141	67	74	29	112	137	15	110
St. Ann's	145	64	81	25	120	141	9	107
Network Learning Community: North East Tottenham								
Northumberland Park	244	108	136	55	189	231	52	222
White Hart Lane	143	75	68	36	107	139	21	127
Network Learning Community: South East Tottenham								
Tottenham Hale	219	106	113	47	172	212	29	195
Seven Sisters	93	43	50	17	76	92	15	78
Tottenham Green	174	87	87	43	131	172	20	157
Bruce Grove	157	74	83	31	126	149	25	139
Not known								
n/a	519	244	275	53	466	443	40	327
Haringey								
Grand Total	3,101	1,486	1,615	434	2,667	2,921	331	2,233

1.7 Incidence of children with SEND

The London Borough of Haringey provides a fund known as the Early Years Inclusion Fund available to 2 year olds and 3 and 4 year olds, to which all Haringey childcare providers can apply in order to receive additional funding to support them to meet a SEND child's needs. The fund, often called top up, is paid at a high rate (£6.91 per hour per child) and low rate (£1.95 per hour per child), dependent on need. In summer 2019 there were 14, 2 year old children who qualified with 7 of them being medium top up and 7 of them being high top up.

Additionally, there were 126, 3 and 4 year old children who qualified with 45 of them being funded medium top up, of these children 13 were funded for extended top up funding. There were 81 children funded for high top up with 21 of these children being funded for extended top up funding.

Additional to the Early Years Inclusion Fund, the Disability Access Fund (DAF) was introduced in September 2017 and 18 children across PVI and maintained settings accessed the DAF funding in 2019.

The 2018 Haringey School Places Planning Report stated that the number of children and young people with a statement that were resident in the borough is on *an overall upward trajectory*. Evidently in early 2018, there were 1,848 children with statements or education and health care plans resident in the borough. In terms of specific SEND-type need, the numbers of children with ASD (Autistic Spectrum Disorder) had shown the highest increase in numbers. Indeed the number of children with statements has evidently increased year-on-year between 2009 – 2018 and reasons for this are considered to include:

- An increasing population of 0 – 19 year olds
- An increase in the 'staying on' rate of the 16 – 25 years age group – as a result of the increased age range that young people can continue to receive support through their Education Health and Care Plan
- An increase in the number of younger children receiving an Education Health and Care Plan

Table 15 presents the number of primary aged pupils by SEND type resident in the borough as reported by the London Borough of Haringey in early 2018.

Table 15 - Number of primary aged pupils by SEND type in resident in the borough in early 2018 (source: London Borough of Haringey)

SEND type	Number resident in the borough
Autistic Spectrum Disorder	564
Hearing Impairment	31
Moderate Learning Difficulty	250
Multi-Sensory Impairment	2
Physical Disability	91
Profound and Multiple Learning Difficulty	29
Severe Learning Difficulty	32
Social, Emotional & Mental Health	120
Specific Learning Difficulty	21
Speech, Language and Communication Needs	197
Visual Impairment	11

The 2014 Haringey Needs Assessment for children with SEND concluded that in terms of overall long-standing disabilities, at that time there were 1,274 such boys aged 0 – 4 years resident in the borough and 1,157 girls.

The same document also reported that the highest prevalence rates in terms of all children and young people with SEND were observed in the Seven Sisters ward and the Harringay ward, in the eastern vicinity of the borough. The lowest prevalence rates were observed in the Highgate ward, Muswell Hill ward and Crouch End ward which are amongst the least deprived wards in the borough.

1.8 New forthcoming housing developments in the London Borough of Haringey

The London Borough of Haringey School Place Planning Report 2018 and the 2017 Haringey Local Plan identified a number of major forthcoming housing and regeneration projects that will – in all probability – create ongoing phases of increased demand for funded entitlement/childcare places – including 30 hours childcare offer places.

As with the majority of London Borough's, a particular locality of the borough has been designated as a Mayor's Housing Zone – in this case the Tottenham vicinity, which via the Tottenham 'zone' and the North Tottenham 'zone' will eventual yield a combined total of 2,565 new dwellings, incorporating the Hale Village site.

The Haringey School Place Planning Report 2018 outlined how new developments and regeneration initiatives would impact on school's places planning – aligned to specific Planning Areas.

The London Borough of Haringey's Local Plan for 2017 and the Haringey School Place Planning Report 2018 summarised the key housing developments that are set to be established in the borough up to the year 2026⁴. Pages 19 – 20 of London Borough of Haringey's Local Plan for 2017 present housing development/site allocations aligned to ward, and this detail is further supplemented on pages 22 – 23 of the Haringey School Place Planning Report 2018.

Table 16 indicates that the most frequent number of new dwellings are set to be constructed and eventually occupied in the Noel Park ward, followed (closely) in frequency by the Tottenham Hale ward and the Northumberland Park ward. The table also indicates the potential number of *new* early years childcare places for children aged 2, 3 and 4 years that would be required to be established in each ward in order to meet the additional demand theoretically generated by the new occupation of new dwellings. For example, in terms of the Noel Park ward, if a planning yield formula of 0.025 new primary school *Reception places* per number of new dwellings⁵ was applied, this could lead to an additional *approximate* 417 resident children aged 2 – 4 years in that ward at the completion of all of the developments and their phasing, with that figure being aggregated for three age cohorts for this particular methodology.

⁴https://www.haringey.gov.uk/sites/haringeygovuk/files/final_haringey_site_allocations_dtp_online.pdf

Sites in the Tottenham area are addressed in the separate document:

⁵ planningservices.haringey.gov.uk/portal/servlets/AttachmentShowServlet?ImageName=505170

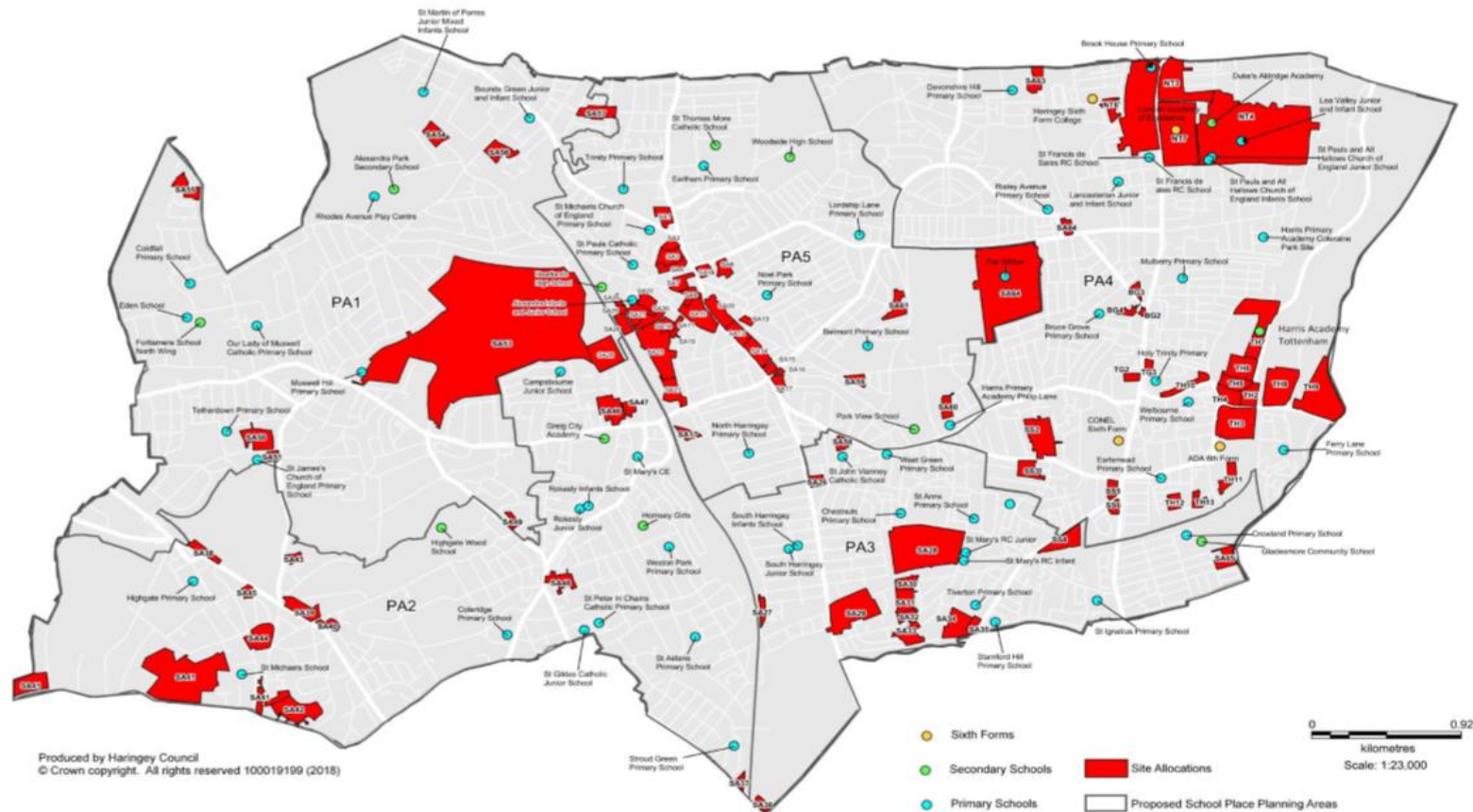
Table 16 - Number of new housing developments set to take place in each of the localities 19 wards up to the year 2026
(primary source: Haringey School Place Planning Report 2018)

Ward	Name of development/site	Number of ongoing – to be completed – dwellings in ward	Potential number of new places for 2, 3 and 4 year olds required aligned to yield formula
Alexandra	Coppetts Wood Hospital site	80	6
	Park Grove and Durnsford Road site	160	12
	Total Ward	240	18
Bruce Grove	13, 5 and 7 Bruce Grove site	42	3
	Bruce Grove Snooker Hall & Banqueting Suite	49	4
	Tottenham Delivery Office site	48	4
	Tottenham Chances & Nicholson Court site	34	3
	Total Ward	173	14
Crouch End	Hornsey Town Hall site	123	9
	Tottenham Lane site	18	1
	Shepherds Hill site	16	1
	Avenue Heights site	17	1
	Total Ward	174	12
Fortis Green	Coppetts Wood Hospital site	80	6
	Total Ward	80	6
Harringay	North of Hornsey Rail Depot site	56	4
	Wightman Road site	48	4
	Finsbury Park Bowling Alley site	71	5
	Turnpike Lane Triangle site	41	3
	Hawes and Curtis site on Green Lanes site	133	10
	Steel Stockholders Yard, Hampden Road site	174	13
	Station Interchange site	138	10
	Total Ward	661	49
Highgate	460-470 Archway Road site	72	5
	Gonnermann Antiques and Goldsmiths Court	37	3
	Highgate Bowl site	31	3
	Somersby Road site	45	4
	Hillcrest site	34	3
	Highgate Magistrates Court site	82	6
	191-201 Archway Road site	25	2
	Cranwood Care Home site	35	3
	Total Ward	326	29
Hornsey	Cross Lane site	52	4
	Hornsey Depot site	438	33
	Total Ward	490	37
Muswell Hill	Park Road and Lynton Road site	41	3
	St. Luke's Hospital site	156	12
	Cranwood Care Home site	35	3
	Total Ward	232	18

Ward	Name of development/site	Number of ongoing – to be completed – dwellings in ward	Potential number of new places for 2, 3 and 4 year olds required aligned to yield formula
Noel Park	Clarendon Square Gateway site	195	15
	Clarendon Square site	1,080	81
	Clarendon Road South site	201	15
	North West of Clarendon Square site	29	2
	Land adjacent to Coronation Sidings site	173	13
	Vue Cinema site	99	7
	Mecca Bingo site	209	16
	Morrison's Wood Green site	234	18
	Wood Green Library site	195	14
	The Mall West and East sites	820	61
	Iceland site	84	6
	Bury Road Car Park site	249	19
	Salvation Army site	74	6
	16-54 Wood Green High Road site	420	31
	Land near to Westbury and Whymark Avenue	117	9
	Bittern Place site	173	13
	Land r/o Hornsey Park Road site	72	5
	Coberg Road North site	181	13
	Wood Green Cultural Centre (South) site	341	26
	Wood Green Cultural Centre (North) site	153	11
Western Rd Car Park site	92	7	
Hornsey Filter Beds site	304	29	
	Total Ward	5,495	417
Northumberland Park	Tottenham Hotspur Stadium site	585	44
	Northumberland Park North site	472	35
	Northumberland Park Estate Renewal site	1,929	144
	North of White Hart Lane site	100	8
		Total Ward	3,086
St Ann's	St Ann's Hospital site	456	34
	St Ann's Road Police Station site	56	4
	Red House, West Green Road site	28	2
	Gourley Triangle site	191	14
		Total Ward	731
Seven Sisters	Seven Sisters and Tewksbury Road site	63	5
	Plevna Crescent site	72	5
	High Road West site	1,200	90
	Arena Retail Park and Design Centre site	579	43
	Crusader Industrial Estate site	64	5
	Omega Works site	40	3
	Vale/Eade Roads site	101	8
	Overbury and Eade Roads site	141	11
	Leabank and Lemsford Close site	65	5
		Total Ward	2,265

Ward	Name of development/site	Number of ongoing – to be completed – dwellings in ward	Potential number of new places for 2, 3 and 4 year olds required aligned to yield formula
Stroud Green	Stroud Green Road site	63	5
	Lawrence Road sites	196	15
	Total Ward	259	18
Tottenham Hale	High Road site	42	3
	Park View Road site	12	1
	1 Station Square site	128	10
	Station Square West site	297	23
	Station Square North site	213	16
	Ashley Road South site	444	33
	Ashley Road North site	147	11
	Hale Wharf site	405	30
	Welbourne Centre site	244	18
	Tottenham Police Station & Reynardson Court	22	1
	Tottenham Hale Retail Park site	992	74
	Hale Village site	2,423	182
	Total Ward	5,369	402
Tottenham Green	Lawrence Road site	413	31
	Ward's Corner site	163	12
	Apex House site	(also) 163	12
	Monument Way site	54	4
	Fountayne Road site	113	8
	Herbert Road site	66	5
	Constable Crescent site	(also) 66	5
	Total Ward	1,038	77
West Green	Haringey Professional Development Centre	49	4
	Keston Centre site	126	9
	Barber Wilson site	66	5
	The Roundway site	56	4
	Leabank & Lemsford Close site	65	5
	Turnpike Lane Station site	85	6
	Haringey Professional Development Centre	49	4
	Total Ward	496	37
White Hart Lane	The Selby Centre	n/a	n/a
	Total Ward	n/a	n/a
Woodside	London Borough of Haringey Civic Centre site	116	9
	Green Ridings House site	146	11
	Wood Green Bus Garage site	237	18
	Station Road Offices site	197	15
	The Roundway site	56	4
	Total Ward	752	57

Figure 1.1 – Housing trajectory sites with Haringey schools



b) Demand analysis – Providers Audit

A telephone survey – using a standard format of semi-structured interview questions – was undertaken with (a) registered early years childcare providers/settings and (b) registered childminders and registered out of school childcare providers operating throughout the London Borough of Haringey locality.

79 of the borough’s PVI early years childcare providers/settings participated in the survey – i.e. 100% of that cohort operating in the locality.

42 of the borough’s 52 maintained school nursery classes participated in the survey – i.e. 80% of that cohort operating in the locality.

136 of the borough’s relevant childminders participated in the survey – i.e. 81% of that cohort operating in the locality. It can be noted that 43% of the responding childminders stated that they co-worked with another registered childminder or a childminding assistant.

Additionally, during 2019 a telephone survey – using a standard format of semi-structured interview questions – was undertaken with (a) after school clubs; (b) before school/breakfast clubs and (c) holiday playschemes operating throughout the London Borough of Haringey locality.

- 40 after school clubs participated in the survey
- 35 breakfast clubs participated in the survey
- 9 holiday playschemes participated in the survey

The Providers Audit requested that respondents give feedback on **demand-themed subjects**, including demand orientated issues that were related to funded early years places and childcare places, i.e. the:

- Funded entitlement for 2 year olds
- 15 hours funded entitlement for 3 and 4 year olds
- 30 hours childcare offer

The following section outlines that demand-themed feedback, commencing with...

1.8 Incidence of waiting lists

1.8.1 All responding early years childcare providers/settings were asked whether they had a waiting list for their provision in 2019. 35% of responding PVI settings stated that they did have a waiting list for both fee paying and funded places, most frequently situated in the Alexandra, Fortis Green, Highgate and Muswell Hill wards and for the (non funded) 1 years age group. 36% of responding maintained nursery classes stated that they did have a waiting list, and were mainly situated in the above wards and for the 3 years age group. In contrast, 12% of registered childminders stated that they did have a waiting list, most frequently for the 0 – 12 months age group and such childminders were most frequently operating in the above wards.

1.8.2 Responding providers were asked to indicate the number of children that they had on a waiting list for each age range – see Table 17 and Table 18.

Table 17 - Numbers of children waiting for a childcare place by ward and NLC and provider type as stated by *responding* childcare providers

Network Learning Community	Registered Childminder	Early Years Childcare PVI setting	Maintained Nursery Class	Out of School Provider	Total
Muswell Hill/Highgate Network Learning Community					
Alexandra	1	96	48	0	145
Fortis Green	0	84	17	2	103
Highgate	0	0	21	5	26
Muswell Hill	8	47	0	14	69
Total NLC	9	227	86	21	343
Hornsey/Stroud Green Network Learning Community					
Crouch End	4	66	0	5	75
Hornsey	0	15	4	0	19
Stroud Green	0	50	10	0	60
Total NLC	4	131	14	5	154
Wood Green Network Learning Community					
Bounds Green	5	6	0	0	11
Noel Park	2	7	11	0	20
Woodside	8	16	10	0	34
Total NLC	15	29	21	0	65
Harringay/West Green Network Learning Community					
Harringay	5	39	0	40	84
St. Ann's	0	0	0	0	0
West Green	2	302	127	3	434
Total NLC	7	341	127	43	518
North East Tottenham Network Learning Community					
Northumberland Park	0	0	4	0	4
White Hart Lane	0	0	0	0	0
Total NLC	0	0	4	0	4
South East Tottenham Network Learning Community					
Bruce Grove	0	0	0	0	0
Seven Sisters	0	0	6	6	12
Tottenham Green	0	30	0	15	45
Tottenham Hale	0	24	0	0	24
Total NLC	0	54	6	21	81

The numbers of children waiting for a childcare place had evidently decreased in comparison to 2015. However, as in the 2015 Childcare Sufficiency Assessment, a relatively high number of children are evidently waiting for a place at settings located in the Harringay, St Ann's and West Green wards.

Table 18 - Numbers of children waiting for a childcare place by NLC and age range as stated by *responding* sector childcare providers

Network Learning Community	0 – 12 months Age Group	1 years Age Group	2 years Age Group	3 – 4 years Age Group	5 – 11 years Age Group
Muswell Hill/Highgate Network Learning Community					
Alexandra	7	0	73	17	0
Fortis Green	28	27	12	12	2
Highgate	0	0	0	0	5
Muswell Hill	11	7	37	6	14
Total NLC	46	34	122	35	21
Hornsey/Stroud Green Network Learning Community					
Crouch End	2	10	44	12	5
Hornsey	10	5	0	0	0
Stroud Green	25	25	0	0	0
Total NLC	37	40	44	12	5
Wood Green Network Learning Community					
Bounds Green	4	0	5	2	0
Noel Park	2	4	5	0	0
Woodside	0	4	10	4	0
Total NLC	6	8	20	6	0
Harringay/West Green Network Learning Community					
Harringay	5	10	19	10	40
St. Ann's	0	0	0	0	0
West Green	3	74	77	95	3
Total NLC	8	84	96	105	43
North East Tottenham Network Learning Community					
Northumberland Park	0	0	0	4	0
White Hart Lane	0	0	0	0	0
Total NLC	0	0	0	0	0
South East Tottenham Network Learning Community					
Bruce Grove	0	0	0	0	0
Seven Sisters	0	1	0	0	6
Tottenham Green	0	20	10	0	15
Tottenham Hale	0	0	23	0	0
Total NLC	0	21	33	0	21

Table 18 indicates that children who are in the age ranges 2 – 4 years make up the majority of those waiting for a place (926 children on waiting lists aged 2 – 4 years out of 1,124 across all age ranges, or 82%).

1.9 Incidence of vacancies

1.9.1 Table 19 indicates the number of vacant places reported by the *responding* childcare providers in 2019.

Table 19 - Numbers of vacant places by NLC and age range

Network Learning Community	0 – 12 months Age Group	1 years Age Group	2 years Age Group	3 – 4 years Age Group	5 – 11 years Age Group	Total
Highgate/ Muswell Hill	12	38	79	103	338	570
Hornsey/ Stroud Green	12	11	27	122	126	298
Wood Green	71	79	58	159	219	586
Harringay/ West Green	58	71	174	305	365	973
North East Tottenham	38	28	70	138	460	734
South East Tottenham	55	63	214	239	597	1,168
Total	246	290	622	1,066	2,105	4,329

Table 20 outlines how a high percentage of vacancies are within the out of school childcare sector provider type (48% across all age ranges).

Table 20 - Numbers of vacant places by NLC and provider type

Type of Childcare Provider	0 – 12 months Age Group	1 years Age Group	2 years Age Group	3 – 4 years Age Group	5 – 11 years Age Group	Total
Childminder	74	89	115	92	n/a	370
Early Years PVI Setting	172	201	475	741	n/a	1,589
Maintained Nursery Class	0	0	42	251	n/a	293
Out of School Provider	n/a	n/a	n/a	226	1,851	2,077

1.9.2 Table 21 indicates the vacancies reported by ward and age range by *responding* (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders.

Table 21 - (Combined) vacancies by ward and age range stated by (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders

Ward and Network Learning Community	0 – 12 months Age Group	1 years Age Group	2 years Age Group	3 – 4 years Age Group	Total
Network Learning Community: Highgate/Muswell Hill					
Alexandra	0	0	5	3	8
Fortis Green	8	34	34	46	122
Highgate	0	0	12	18	30
Muswell Hill	3	4	28	36	71
Total NLC	11	38	79	103	231
Network Learning Community: Hornsey/Stroud Green					
Crouch End	0	6	20	40	66
Hornsey	12	0	12	63	87
Stroud Green	0	5	5	0	10
Total NLC	12	11	37	103	163
Network Learning Community: Wood Green					
Bounds Green	15	2	33	37	87
Noel Park	31	18	18	28	95
Woodside	25	32	7	91	155
Total NLC	71	52	58	156	337
Network Learning Community: Harringay/West Green					
Harringay	78	30	85	90	283
St. Ann's	5	20	102	107	234
West Green	18	23	50	80	171
Total NLC	101	73	237	277	688
Network Learning Community: North East Tottenham					
Northumberland Park	1	6	32	30	69
White Hart Lane	37	22	34	108	201
Total NLC	38	28	66	148	280
Network Learning Community: South East Tottenham					
Bruce Grove	50	37	21	73	181
Seven Sisters	0	1	11	45	57
Tottenham Green	0	5	15	20	40
Tottenham Hale	5	5	133	146	289
Total NLC	55	48	180	284	567
Total Haringey	288	250	657	1,071	2,266

1.10 Fees and the Cost of Childcare

- 1.10.1 The size of childcare fees was cited by parents as a barrier to the use of formal childcare, i.e. a contingency which can affect demand (see page 75). Based on the 2019 Providers Audit responses the cost of childcare in the London Borough of Haringey is higher than the inner-London average, with an average cost per hour for a nursery provision of £7.81 and for a childminder: £7.30.

Table 22 – Average cost per hour by childcare type

Type of Childcare Provider	Per Hour Haringey	Per Hour London	Per Session	Per Day
Childminder	£7.30	£6.11	£32.36	£59.20
Early Years PVI Setting	£7.81	£6.47	£34.14	£63.98
Out of School Provider	£2.36	n/a ⁶	£3.13	n/a

Table 22 indicates that the most expensive type of childcare in the London Borough of Haringey in 2019 are PVI early years childcare providers/settings at, on average, almost £64.00 per day. Table 23 below shows the cost of childcare aligned to Network Learning Community as (per fees) reported by the early years childcare settings and registered childminders who responded to the 2019 Providers Audit.

Table 23 - The average cost of childcare aligned to Network Learning Community for (a) PVI early years childcare providers/settings and (b) registered childminders

Wards of...	Per Hour	Per Session	Per Day
Alexandra, Fortis Green, Highgate and Muswell Hill	£8.35	£38.87	£70.61
Hornsey, Crouch End, Fortis Green	£8.18	£32.50	£64.84
Woodside, Noel Park, Bounds Green	£7.45	£32.79	£65.89
Harringay, St. Ann's, West Green	£7.35	£31.40	£56.06
Northumberland Park, White Hart Lane	£6.63	£31.48	£52.67
Tottenham Hale, Tottenham Green, Sevens Sisters, Bruce Grove	£7.03	£28.21	£55.31
Average	£7.50	£32.54	£60.90

Table 23 indicates that in 2019 childcare fees were most expensive in the Network Learning Community area of Highgate/Muswell Hill and were least expensive in the two Tottenham localities.

⁶ In summer 2019 Coram Family and Childcare reported that £57.36 was the average weekly fee for a place in an after-school club or £65.70 for a childminder in London. The 2019 Haringey CSA reported a weekly average of £50 for an after-school club.

1.10.2 Table 24 outlines the average hourly fee sizes aligned to ward level, once again for (a) PVI settings and (b) registered childminders. It indicates that in 2019 the following three wards had the most expensive childcare:

- Fortis Green ward
- Muswell Hill ward
- Alexandra ward

Table 24 – Average hourly cost of childcare (fees) by ward for (a) PVI settings and (b) registered childminders

Ward and Network Learning Community	Per Hour
Highgate/Muswell Hill Network Learning Community	
Alexandra	£7.90
Fortis Green	£8.42
Highgate	n/a
Muswell Hill	£8.12
Hornsey/Stroud Green Network Learning Community	
Crouch End	£7.69
Hornsey	£7.52
Stroud Green	n/a
Wood Green Network Learning Community	
Bounds Green	£8.50
Noel Park	£7.20
Woodside	£6.54
Harringay/West Green Network Learning Community	
Harringay	£7.14
St. Ann's	£6.42
West Green	£5.74
North East Tottenham Network Learning Community	
Northumberland Park	£5.47
White Hart Lane	£7.50
South East Tottenham Network Learning Community	
Bruce Grove	£7.52
Seven Sisters	£7.40
Tottenham Green	£5.95
Tottenham Hale	£6.38 ⁷

⁷ Childminders only.

10.11.3 Finally, in terms of childcare costs, all *responding* (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders were invited to state whether they applied any additional costs for 30 hours childcare offer places – for example, charges for food, outings and nursery resources.

Table 25 - Incidence of additional costs for 30 hours childcare offer places being charged aligned to type of early years childcare provider

Type of additional cost	PVI Setting	Maintained Nursery Class	Registered Childminder
Food and Meals	60%	96%	71%
Outings and Trips	5%	25%	19%
Resources	5%	0	13%

1.11 Early years free entitlement and eligibility for Funded Childcare

1.11.1 Children throughout the UK are entitled to free early education. It is funded by the government and administered by the local authority. These entitlements are for the equivalent of 38 weeks per year and some are means tested.

For example, all children aged 3 and 4 years are entitled to the universal 15 hours per week free entitlement until they start reception class in school.

Children aged 3 and 4 where both parents are working, or from lone parent families where that parent is working, are entitled to 30 hours per week – aka the 30 hours childcare offer – until the start reception class in school. Families are eligible where each parent is earning the equivalent of 16 hours per week at minimum or living wage and earns up to £100,000 per year. Families also qualifying where one parent is on maternity leave, incapacity benefit, severe disablement allowance, carers allowance or employment and support allowance and the other parent is working.

Finally, children aged 2 who's families receive certain benefits (including in work benefits with an income of less than £16,190, or who have a disability, or who are looked after by the local authority, are entitled to the (15 hours per week) free entitlement for 2 year olds. From April 2018 families who were in receipt of universal credit and a combined/sole income of £15,400 a year after tax also became entitled to the 15 hours per week. Nationally, about 40% of 2 year olds are entitled to this offer but the percentage varies by area.

1.11.2 Although the following metrics could be deemed more relevant to the supply section of the 2019 Childcare Sufficiency Assessment, it is necessary to denote the following metrics, so as to provide context to the analysis that follows them.

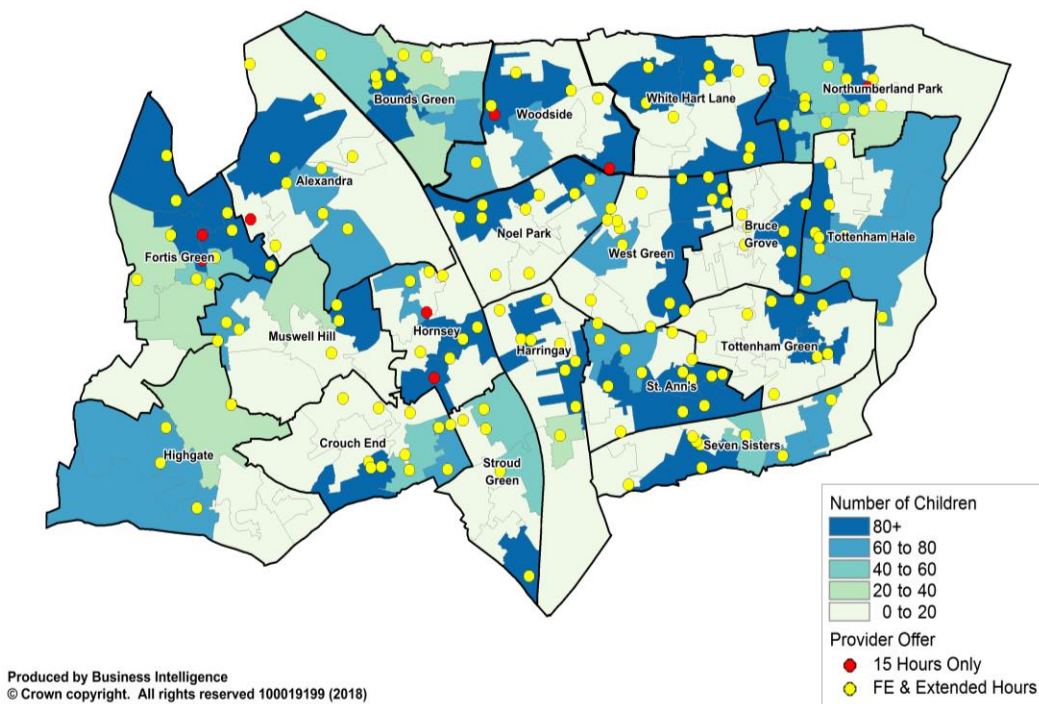
In April 2019, there were 81 Private, Voluntary and Independent (PVI) childcare providers in the London Borough of Haringey registered with Ofsted, of which 76 of these were delivering the 15 hours universal free entitlement for 3 and 4 year olds which equates to 94%. In addition there were 54 maintained nursery classes and 51 that deliver a free entitlement equating to 94%.

Positively, the borough has also seen a large increase in the numbers of registered childminders delivering the 15 hours universal free entitlement for 3 and 4 year olds – from 23 childminders in the January 2018 census to 65 in the January 2019 census, a 35% increase.

The introduction of the 30 hours childcare offer has had a significant impact upon the demand for all free entitlement/funded childcare places and has supported maintained schools to fill up their *afternoon* 15 hour funded childcare places, which prior to 2018, were not very popular with some families. The borough now has a majority of its schools (i.e. maintained nursery classes) delivering 30 hours – 43 in total. The borough also, in summer 2019, has c60 PVI settings and c25 registered childminders delivering the 30 hours childcare offer.

Diagram 3 - Location of the those London Borough of Haringey early years childcare settings that were providing funded childcare places in 2018

Providers of Free Entitlement & Extended Hours for 3-4 Year Olds - by Provider Postcode - as at 10th May 2018



1.11.3 Diagram 4 shows further context – i.e. the take up of funded childcare places by 3 year olds aligned to their ethnicity.

Diagram 4 shows further context – i.e. the take up of funded childcare places by 3 year olds aligned to their ethnicity

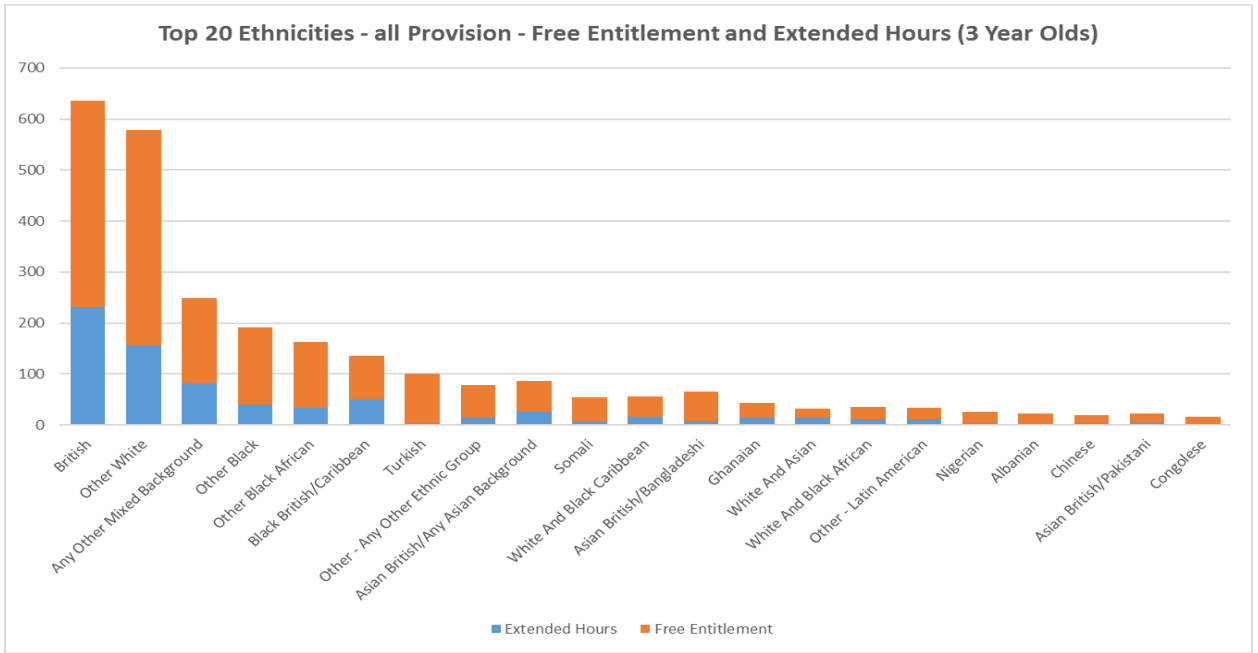


Diagram 4 indicates that White British and White Other 3 year olds have the highest take up figures – accounting for 23% and 21% respectively.

Diagram 5 shows further context – i.e. the take up of funded childcare places by 4 year olds aligned to their ethnicity.

Diagram 5 shows further context – i.e. the take up of funded childcare places by 4 year olds aligned to their ethnicity

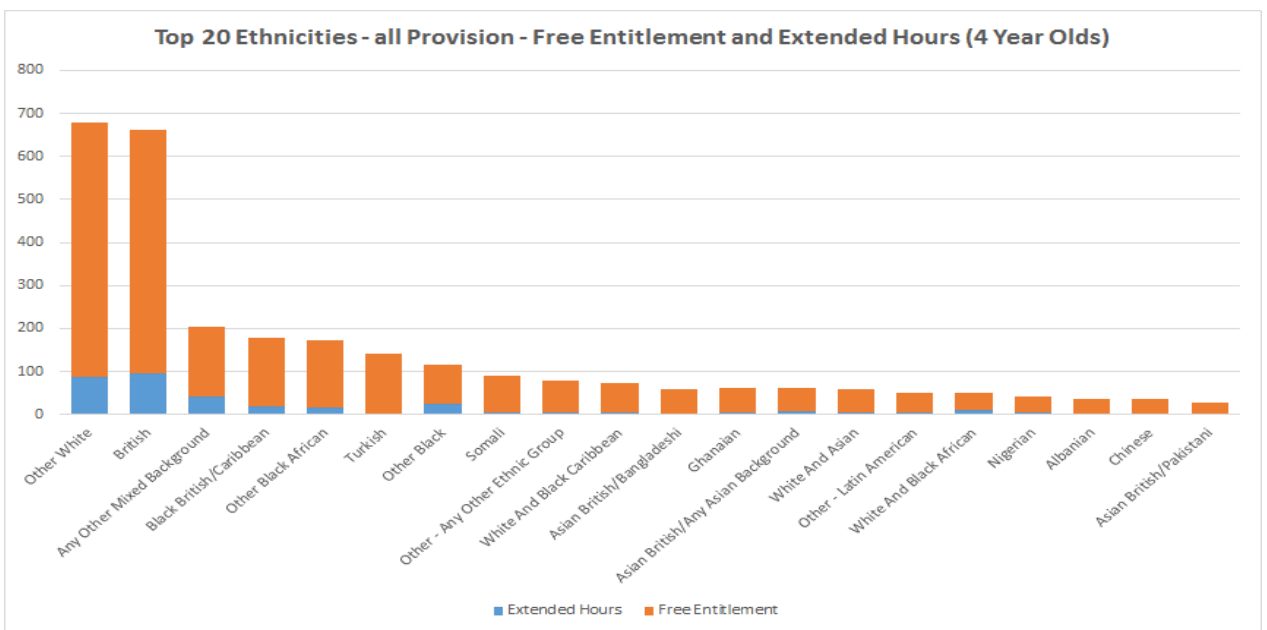


Diagram 5 indicates that the White British and white other have the highest take up figures for 4 year olds (22%).

1.11.4 The following section sets out a demand-themed analysis for (the three types of) funded childcare places, aligned to the responses to the 2019 Providers Audit. All *responding* and applicable (a) early years childcare providers/settings and (b) registered childminders were invited to state whether they believed that they were able to meet the demand for 30 hours childcare offer places, that they were receiving, in 2019 – see Diagrams 6 – 8.

Diagram 6 - Indication of where localised PVI settings believed that they could meet the demand that they were receiving for 30 hours childcare places, in 2019 in the 19 Haringey wards

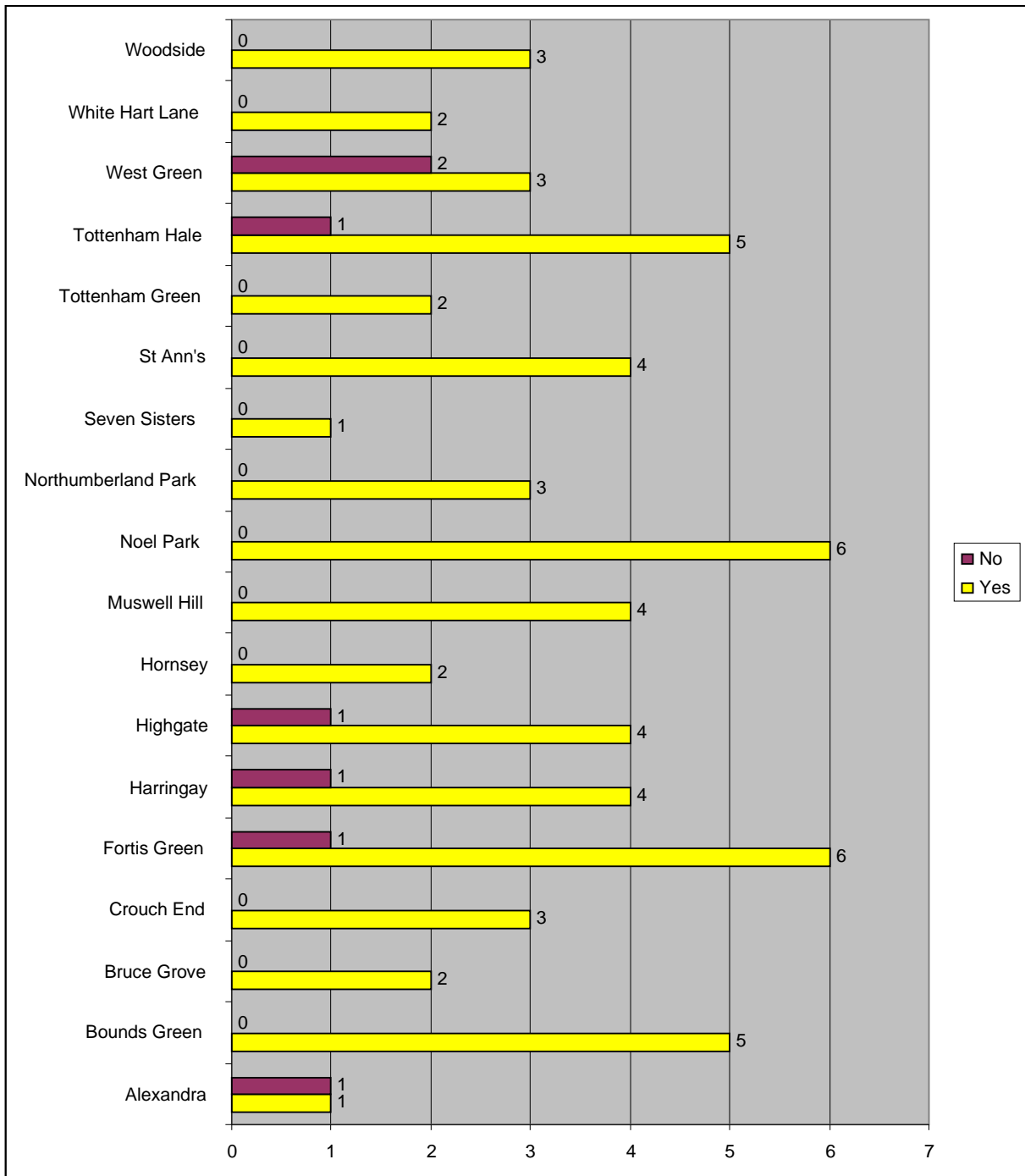


Diagram 7 - Indication of where localised maintained nursery classes believed that they could meet the demand that they were receiving for 30 hours childcare places, in 2019 in the 19 Haringey wards

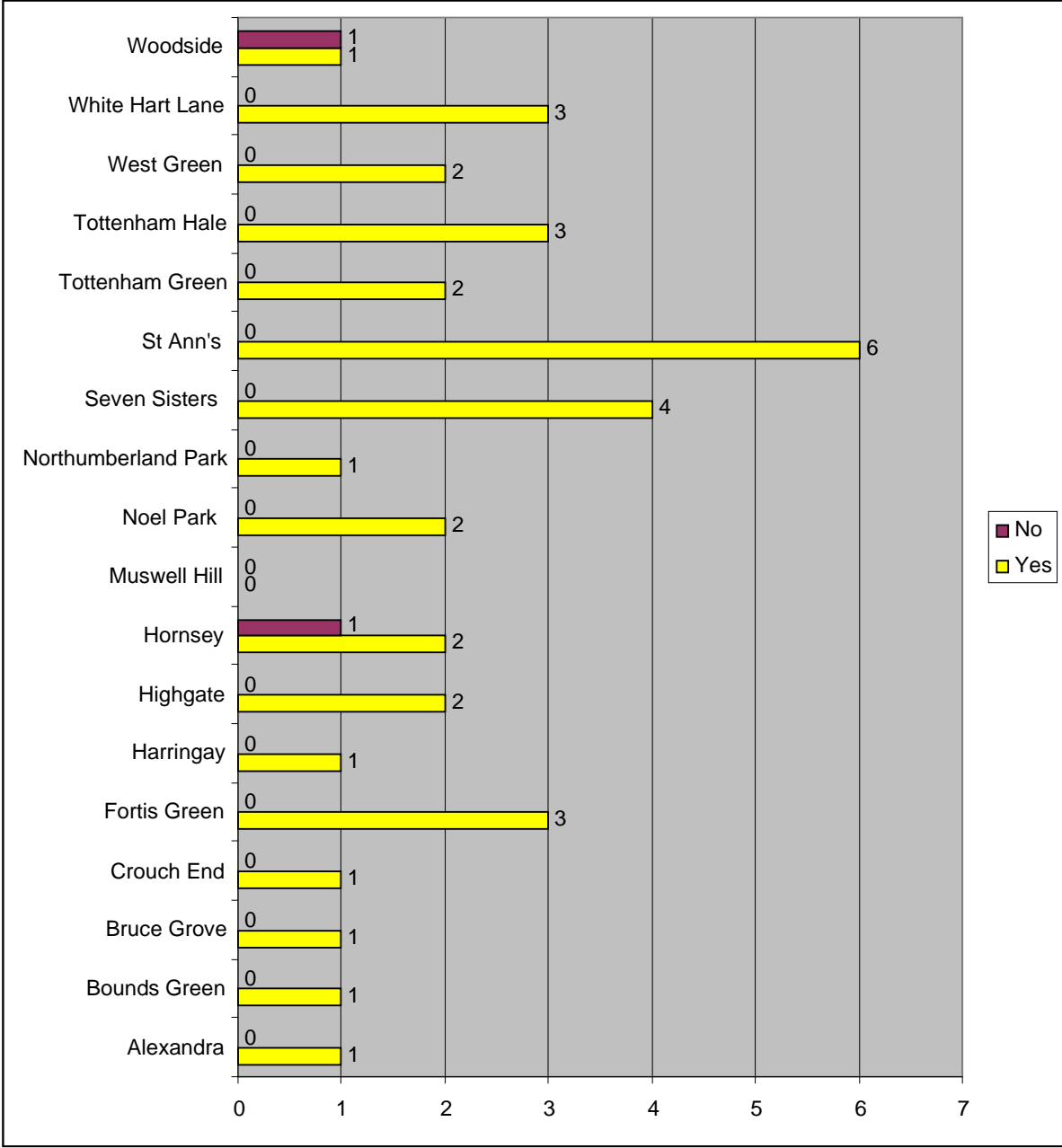
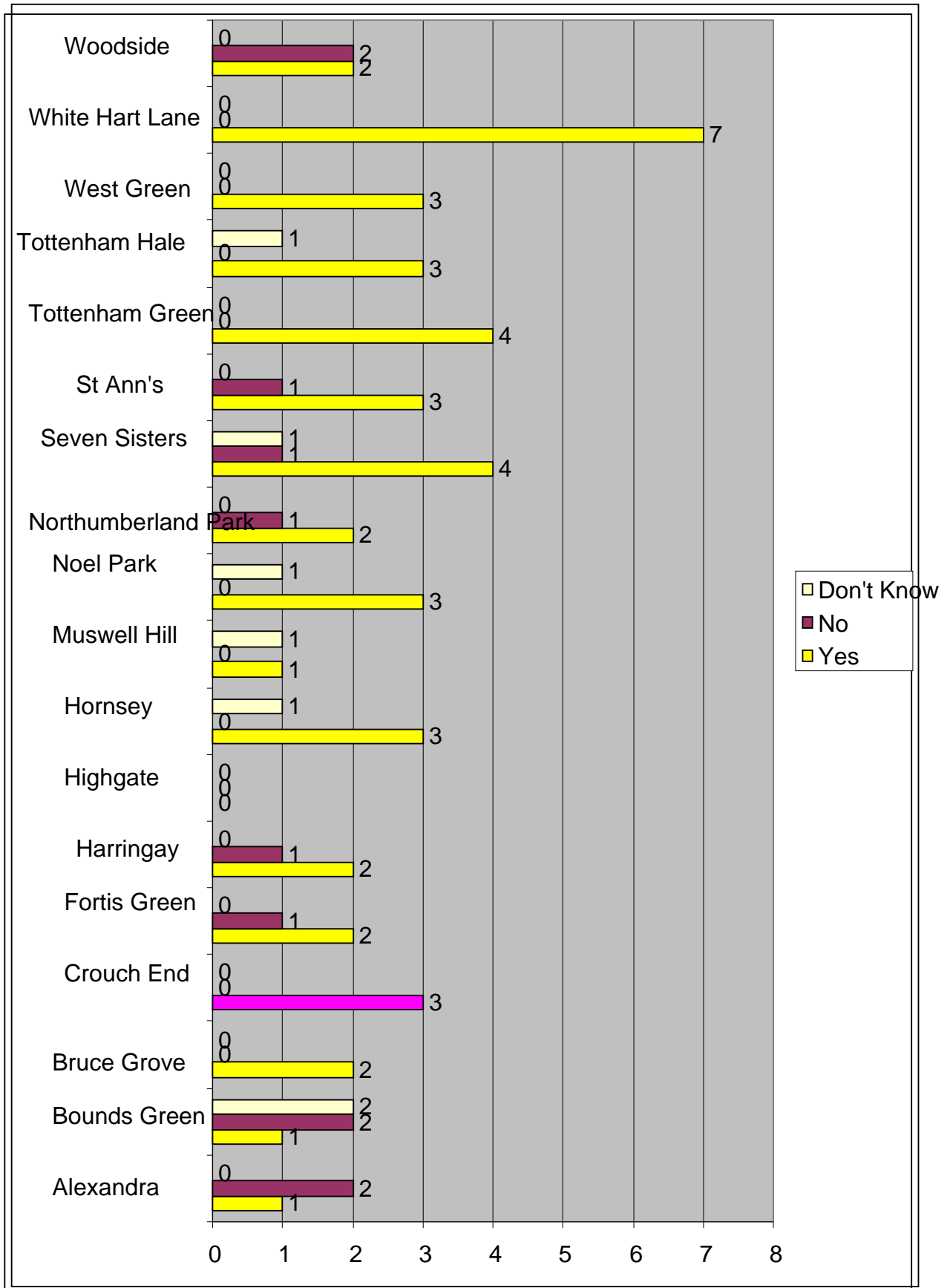


Diagram 8 - Indication of where localised childminders believed that they could meet the demand that they were receiving for 30 hours childcare places, in 2019 in the 19 Haringey wards



1.11.7 All *responding* and applicable (a) PVI settings and (b) registered childminders were invited to state whether they believed that they were able to meet the demand for funded entitlement for 2 year olds places, that they were receiving, in 2019 – see Diagrams 9 – 10.

Diagram 9 - Indication of where localised PVI settings believed that they could meet the demand that they were receiving for free entitlement for 2 year old places, in 2019 in the 19 Haringey wards

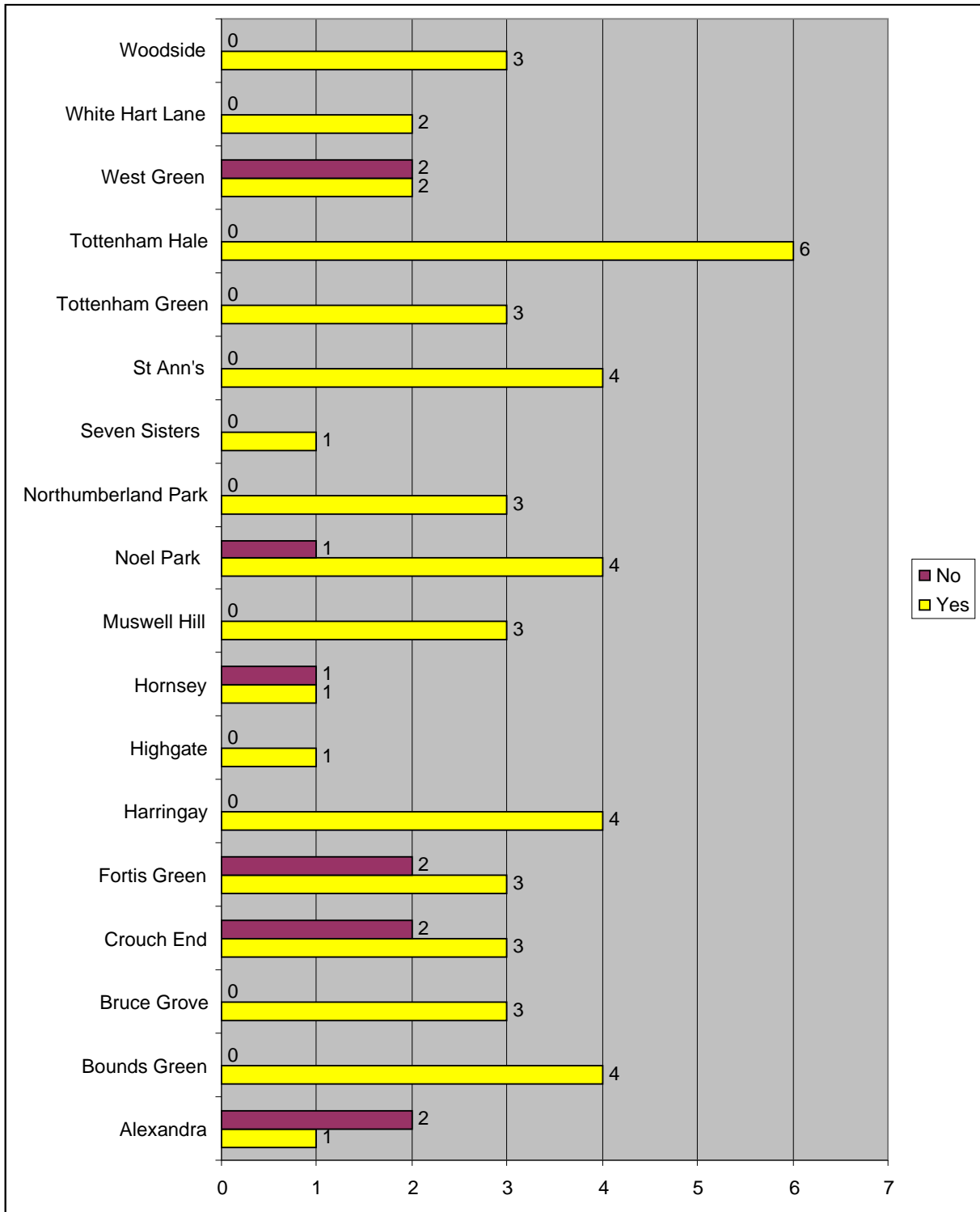
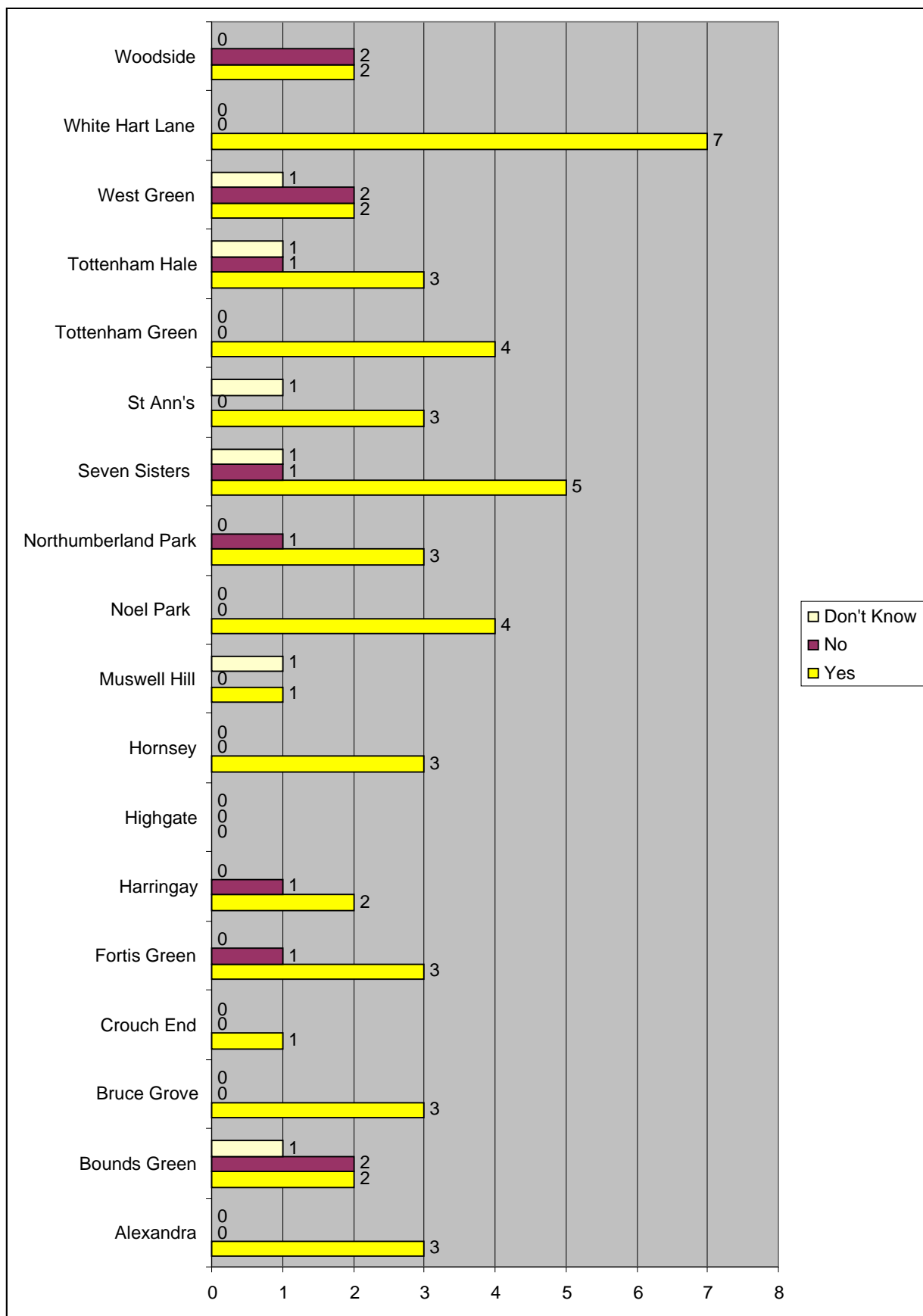


Diagram 10 - Indication of where localised childminders believed that they could meet the demand that they were receiving for free entitlement for 2 year old places, in 2019 in the 19 Haringey wards



1.11.8 Finally, all *responding* and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders were invited to state whether they believed that they were able to meet the demand for universal 15 hours funded entitlement places for 3 and 4 year olds, that they were receiving, in 2019 – see Diagrams 11 – 13.

Diagram 11 - Indication of where localised PVI settings believed that they could meet the demand that they were receiving for universal 15 hours free entitlement for 3 and 4 year old places, in 2019 in the 19 Haringey wards

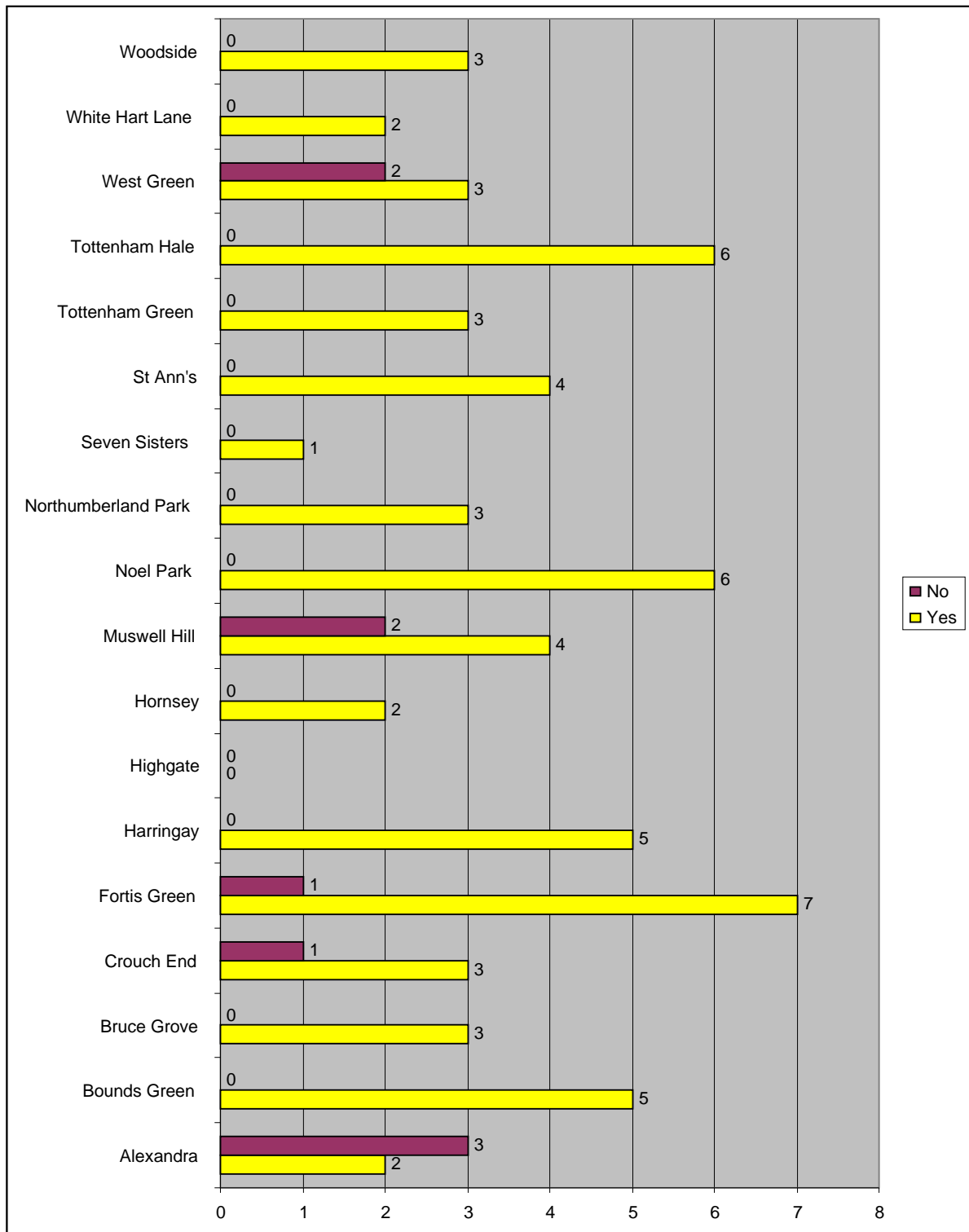


Diagram 12 - Indication of where localised maintained nursery classes believed that they could meet the demand that they were receiving for universal 15 hours free entitlement for 3 and 4 year old places, in 2019 in the 19 Haringey wards

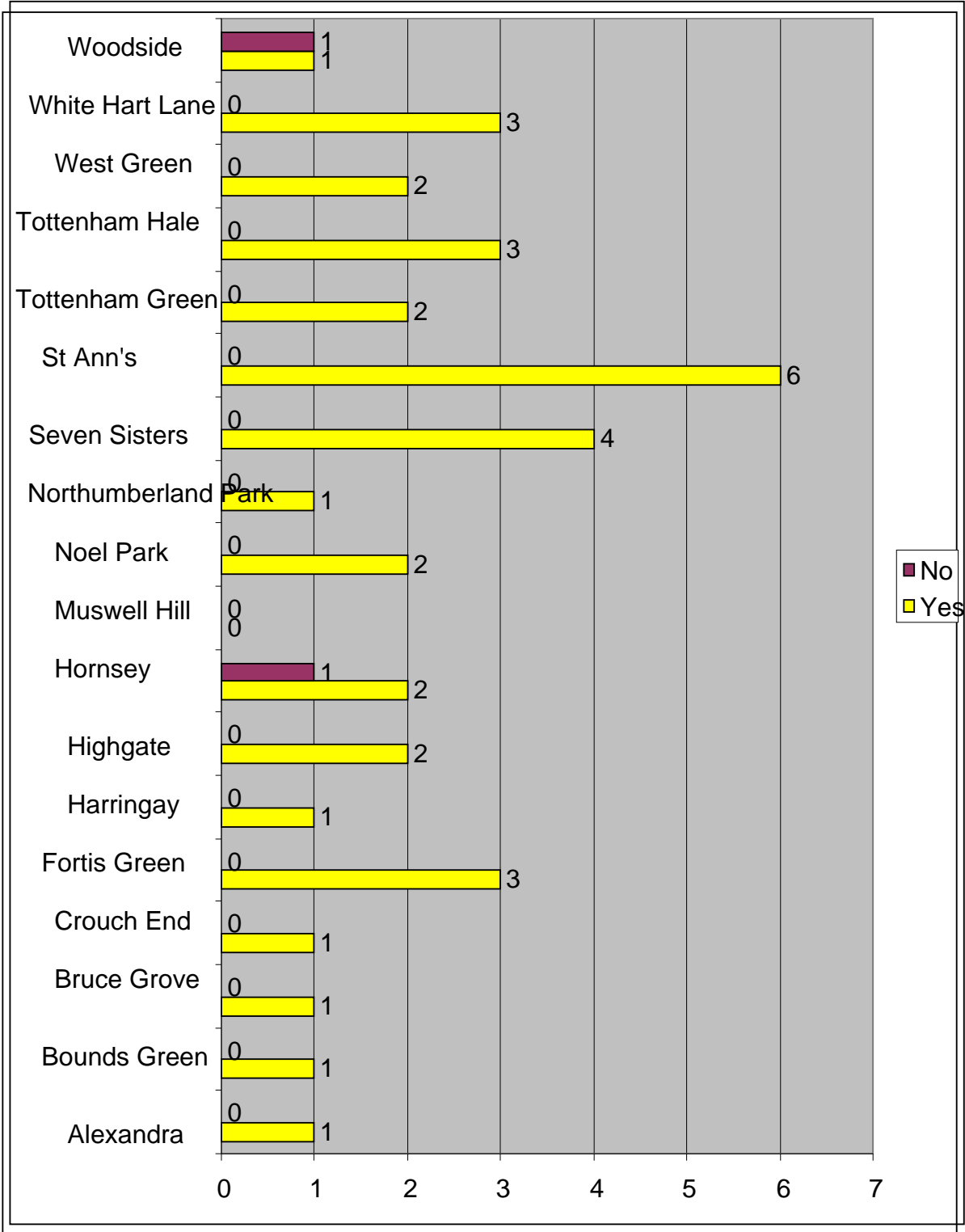
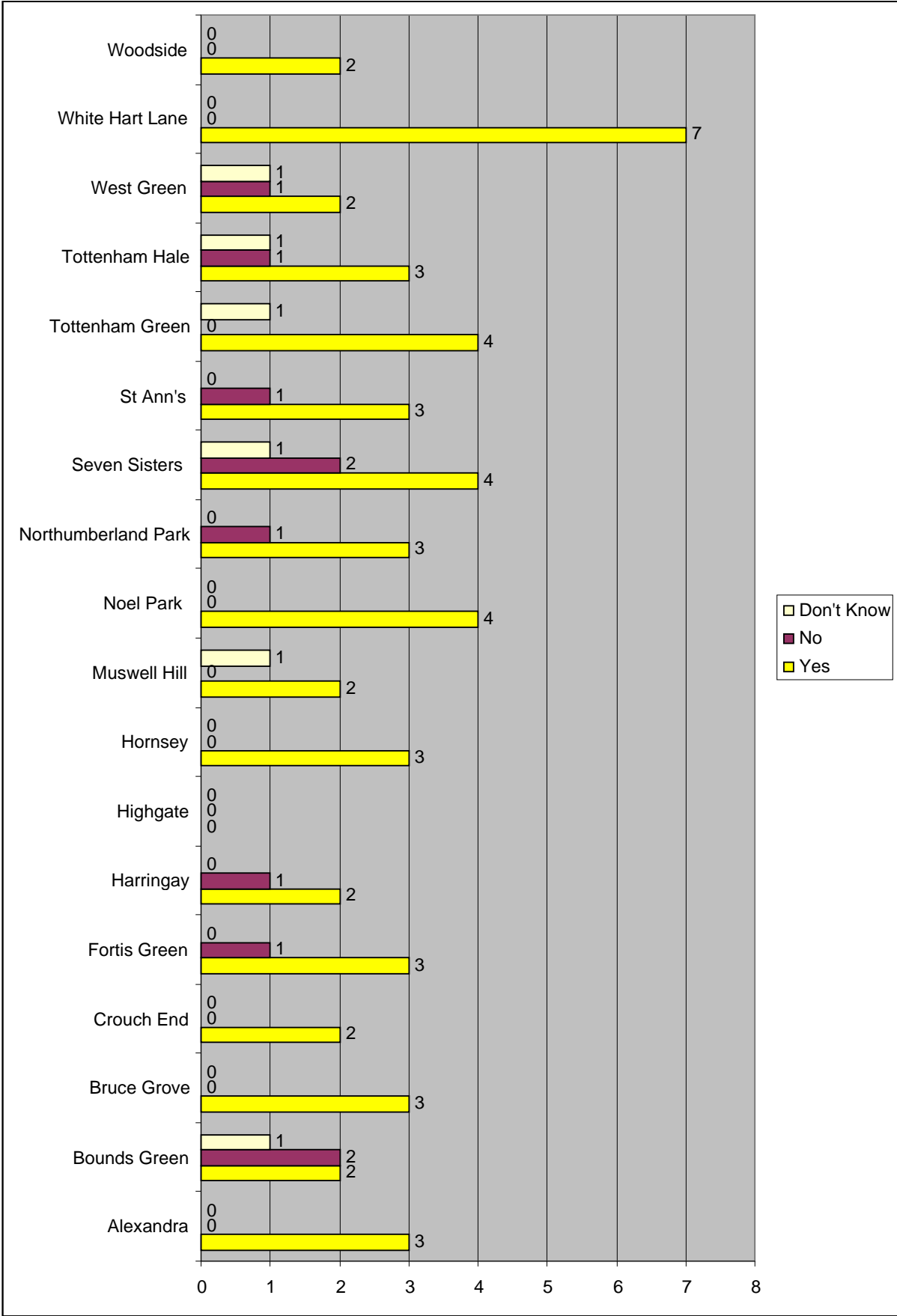


Diagram 13 - Indication of where localised childminders believed that they could meet the demand that they were receiving for universal 15 hours free entitlement for 3 and 4 year old places, in 2019 in the 19 Haringey wards



1.11.9 From a demand perspective, all *responding* and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes *combined* – and (b) registered childminders were invited to state approximately how many 3 and 4 year olds currently pay for additional hours above their 30 hours childcare place, at *their* care in 2019.

The *responding/applicable* early years childcare providers/settings most frequently stated 2 of their 3 and 4 year olds. The average number per responding setting was 3.5. The three wards which accounted for the highest incidence of early years childcare providers/settings having 3 and 4 year olds currently paying for additional hours above their 30 hours childcare place(s) were (the neighbouring wards of):

1. (By a significant margin) Noel Park ward
2. St. Ann's ward
3. West Green ward

The *responding/applicable* registered childminders most frequently stated none of their 3 and 4 year olds. The average number was <1 of their 3 and 4 year olds.

1.11.12 Finally on the theme of the interaction of funded places, all responding and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders who were providing the funded entitlement for 2 year olds were requested to state whether the advent of the 30 hours childcare offer had influenced or affected their delivery of the former offer. Only 5% of (the two types of) early years childcare providers/settings answered that it had, whilst only 3% of responding registered childminders answered that it had.

The most frequent statement was (words to the effect) “*There has been no effect on the other two entitlements*”.

The second most frequent statement – made by only 2 interviewees – was (words to the effect) “*we seem to have received fewer enquiries since the inception of the 30 hours childcare offer about the free entitlement for 2 year olds*”.

1.12 Demand and SEND children and young people

- 1.12.1 The Haringey Local Offer website: <https://www.haringey.gov.uk/children-and-families/local-offer> outlines how parents and carers can access early education and childcare in the borough.

The Providers Audit reported that in terms of *responding* (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders, the five most frequent types of SEND being supported by early years childcare providers and attending their care in 2019 – aligned to age group were (in order of frequency):

1. (By a significant margin) 3 year olds with a Speech, Language and Communication Difficulty
2. 3 year olds with Autistic Spectrum Disorder
3. 2 year olds with a Speech, Language and Communication Difficulty
4. 4 year olds with a Speech, Language and Communication Difficulty
5. 4 year olds with Autistic Spectrum Disorder

- 1.12.2 All applicable and responding (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders were invited to state how many funded entitlement places were occupied – in 2019 – by children with SEND.

There were 0 examples of responding childminders stating that they were caring for a 2 – 4 year old with SEND who were occupying a funded place.

In terms of funded entitlement for 2 year olds places at PVI settings and maintained nursery classes:

- 30% of relevant early years childcare providers stated: None
- 5% of relevant early years childcare providers stated: Don't Know
- 65% of relevant early years childcare providers stated a number... which was on average, 1 (SEND child)

In terms of universal 15 hours funded entitlement places for 3 and 4 year olds at early years childcare providers/settings:

- 31% of relevant early years childcare providers stated: None
- 2% of relevant early years childcare providers stated: Don't Know
- 67% of relevant early years childcare providers stated a number... which was on average, 2 (SEND children) – with the highest incidence being reported in the northern locality

In terms of the 30 hours childcare offer at early years childcare providers/settings:

- 52% of relevant early years childcare providers stated: None
- 2% of relevant early years childcare providers stated: Don't Know
- 46% of relevant early years childcare providers stated a number... which was on average, 1 (SEND child)

1.12.4 From a more general perspective than 1.12.3 above, *all* responding (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders were asked how often they get approached by a parent/carer to see if their setting can care for a child who has SEND. In terms of the responding early years childcare providers/settings:

- 7% of providers stated: At least once a month
- 22% of providers stated: At least once a term
- 10% of providers stated: At least once every six months
- 11% of providers stated: At least once a year
- 31% of providers stated: Rarely
- 14% of providers stated: Never
- 6% of providers stated: Don't Know

In terms of the responding registered childminders:

- 1% stated: At least once a month
- 5% stated: At least once a term
- 7% stated: At least once every six months
- 8% stated: At least once a year
- 40% stated: Rarely
- 39% stated: Never

Relevant respondents (above) were subsequently requested to state how often, in the past 12 months they/their setting had unfortunately had to decline to take a child with SEND due to an inability to most effectively care for their needs. In terms of the responding early years childcare providers/settings:

- 1% of providers stated: Three times or more
(stated by a provider operating in the Bruce Grove ward)
- 0 providers stated: Twice
- 4% of providers stated: Once
- 95% of providers stated: 0 times

In terms of the responding registered childminders:

- 0 stated: Three times or more
- 1% stated: Twice
(stated by a childminder operating in the Woodside ward)
- 4% stated: Once
- 95% stated: 0 times

1.13 Incidence of observed trends in childcare during the period 2016 – 2019

1.13.1 All responding early years childcare providers/settings and registered childminders were requested to outline whether, during the period 2016 – 2019, they had witnessed any *notable* (and new) trend(s) – including in terms of the circumstances of and backgrounds of families accessing their provision.

46% of PVI settings responded that since 2016, they *had* witnessed a *notable* trend(s). The three most frequent types of trends stated by early years childcare providers/settings were (in order of frequency):

1. Receipt of more “*enquiries*” for places for babies
2. An increased incidence of parents saying that they are unable to afford fees
3. An evolving demand for the 30 hours childcare offer

57% of maintained nursery classes responded that since 2016, they *had* witnessed a *notable* trend(s). The three most frequent types of trends stated by early years childcare providers/settings were (in order of frequency):

1. An increased demand for longer/extended hours of care
2. An increased demand for full-time hours of care
3. An evolving demand for the 30 hours childcare offer

1.13.2 45% of registered childminders responded that since 2016, they had witnessed a *notable* trend(s).

The three most frequent types of trends stated by registered childminders were:

1. An *decreased* demand – in general – including for funded entitlement places
2. We are aware of more parents preferring to access setting-based early years childcare
3. An increased demand for longer/extended hours of care

1.13.3 All responding out of school childcare providers were requested to outline whether, since 2016 – 2019, they had witnessed any *notable* (and new) trend(s) – including in terms of the circumstances of and backgrounds of families accessing their provision.

55% of after school clubs responded that since 2016, they *had* witnessed a *notable* trend(s). The three most frequent types of trends stated by such providers/settings were (in order of frequency):

1. Generally demand has increased
2. A higher incidence of *working* parents are enquiring about a place
3. Parents with zero hours contracts require more flexibility

34% of breakfast clubs responded that since 2016, they *had* witnessed a *notable* trend(s). The three most frequent types of trends stated by such providers/settings were (in order of frequency):

1. Generally demand has increased
2. A higher incidence of parents requesting a pre-8am opening time
3. More requests to take 3 year old children

33% of holiday playschemes responded that since 2016, they *had* witnessed a *notable* trend(s). The two most frequent types of trends stated by such providers/settings were (in order of frequency):

1. A higher incidence of parents who struggle to afford fees
2. A discernible increase in demand from carers of children with SEND

1.14 Perceptions on how demand may modify by 2021

1.14.1 All early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and registered childminders were requested to state/qualify how much higher or lower they expected the demand for their provision/daycare places to be in early 2021 – i.e. two years hence.

Diagrams 14 and 15 outlines the responses/sector.

Diagram 14 - Extent to which early years PVI and maintained settings believed demand for (their) childcare would differ (or remain the same) in *early 2021*

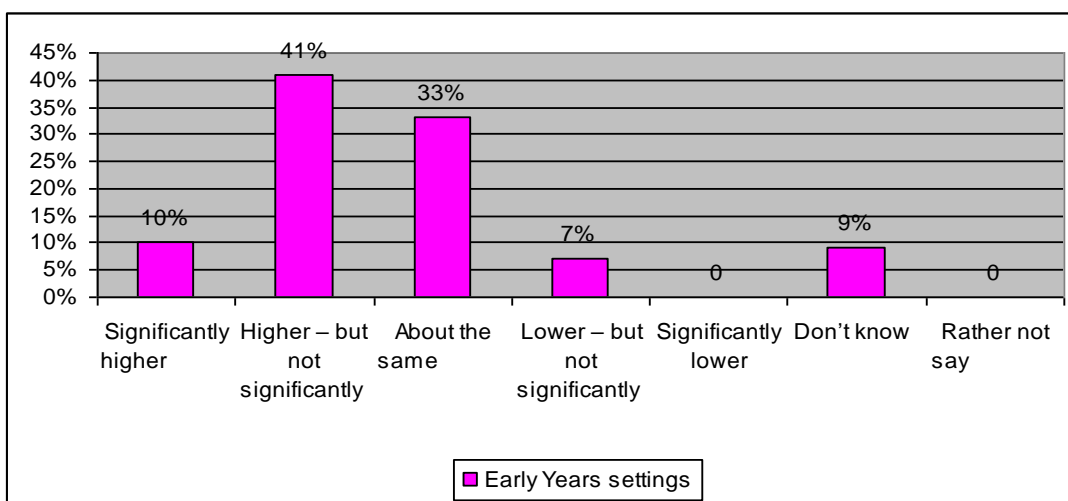
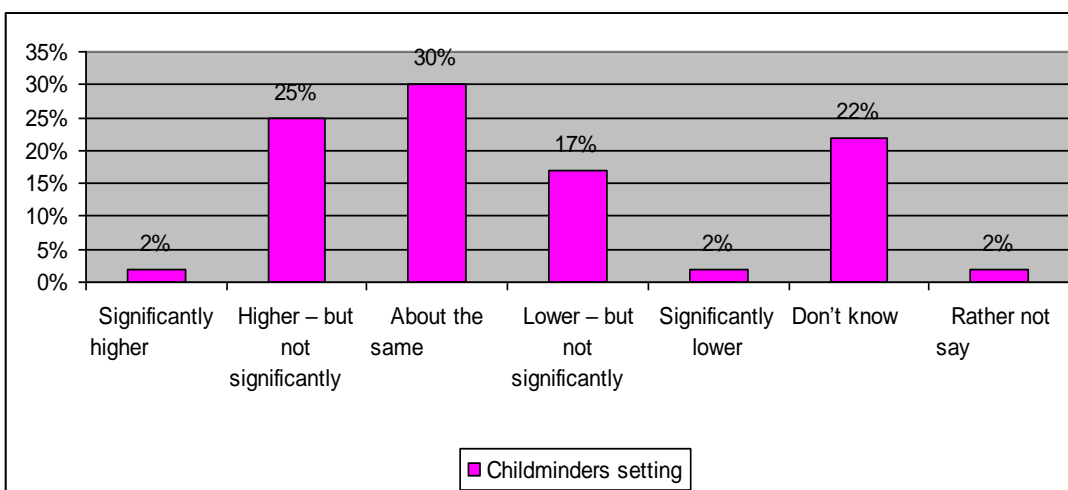


Diagram 15 - Extent to which registered childminders believed demand for (their) childcare would differ (or remain the same) in *early 2021*



1.14.2 Diagrams 14 and 15 indicate that the:

- London Borough of Haringey early years childcare providers/settings most frequently expected demand to be higher – but not significantly. One-third of the early years childcare providers/settings that stated Significantly Higher were located in the Tottenham Hale ward
- London Borough of Haringey registered childminders most frequently expected demand to be about the same

1.14.3 All out of school childcare providers were requested to state/qualify how much higher or lower they expected the demand for their provision/daycare places to be in early 2021 – i.e. two years hence. Diagrams 16, 17 and 18 outline the responses/sector...

Diagram 16 - Extent to which after school clubs believed demand for (their) childcare would differ (or remain the same) in early 2021

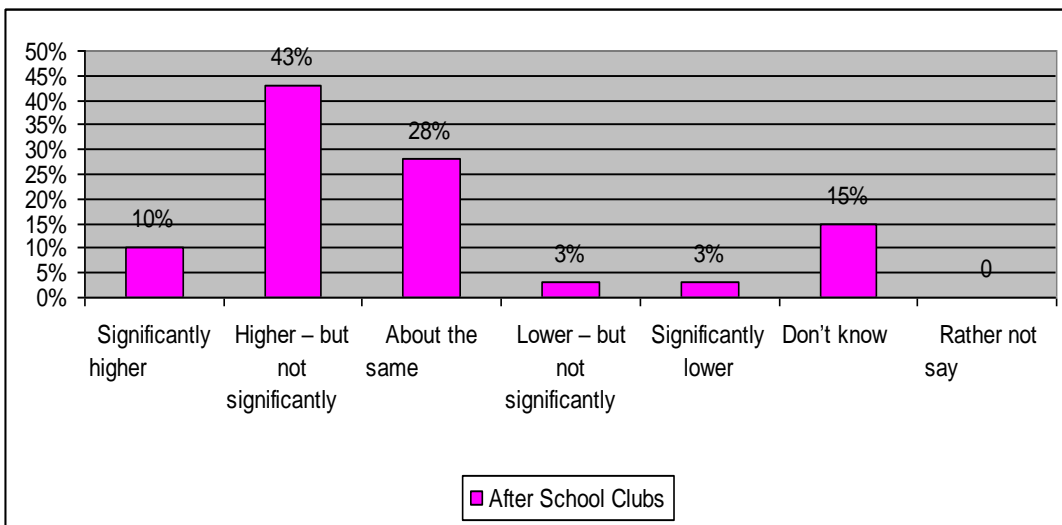


Diagram 17 - Extent to which breakfast clubs believed demand for (their) childcare would differ (or remain the same) in early 2021

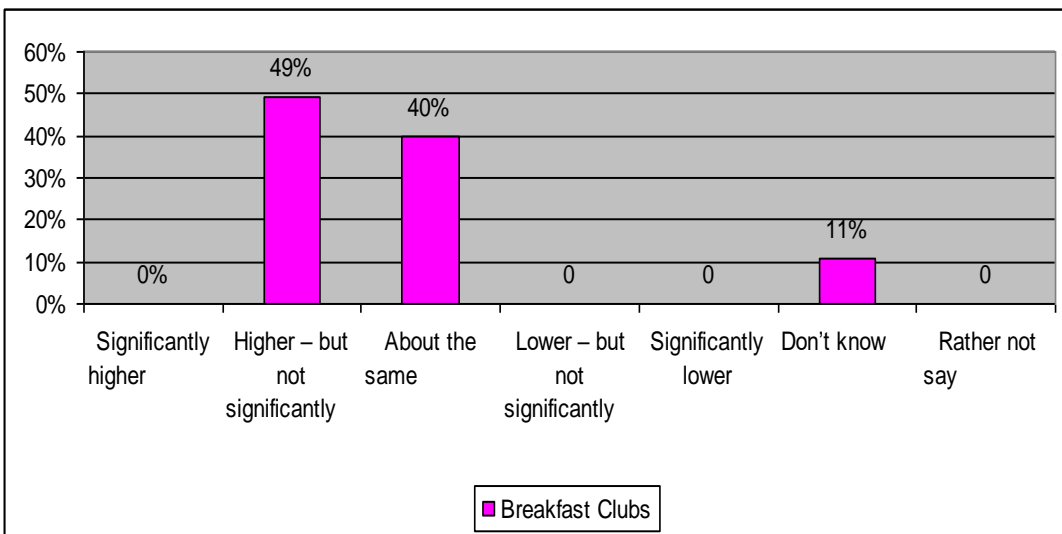
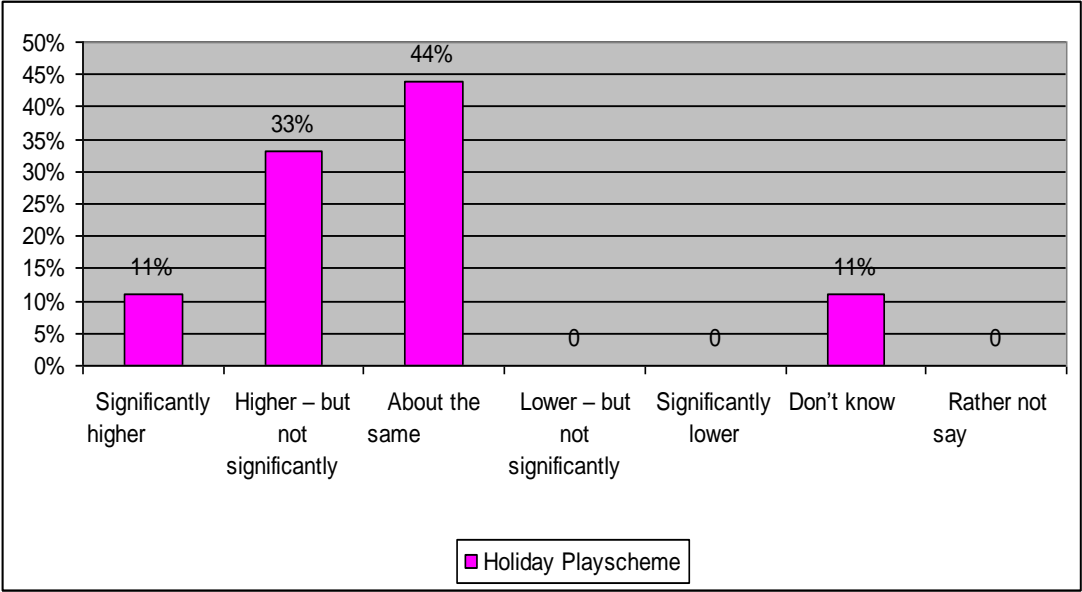


Diagram 18 - Extent to which holiday playschemes believed demand for (their) childcare would differ (or remain the same) in early 2021



1.14.4 Diagrams 16, 17 and 18 indicate that the London Borough of Haringey out of school childcare providers/settings most frequently expected demand to be higher – but not significantly. The Bruce Grove, Seven Sisters, Tottenham Green and Tottenham Hale accounted for the highest frequency of the response(s): Significantly Higher or Higher – but Not Significantly.

1.15 Perceptions on the existing sufficiency of childcare

1.15.1 Table 26 indicates the extent to which early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and registered childminders currently consider that – from their perspective – there is sufficiency of specific types of childcare places (denoted in column A) within *their immediate geographical area*.

This section 1.15 should be viewed in the context of (a) the incidence of vacancies set out in section 1.19 and the availability of early years childcare and places with registered childminders that is presented in the Supply Section of this CSA – see page 87.

Table 26 - Extent to which early years childcare providers/settings and registered childminders operating in the London Borough of Haringey consider there is sufficiency of childcare places for 0 – 4 year olds

Age Groups of childcare places	Yes there is sufficiency of places for 0 – 12 months in our immediate geographical area	No there is not sufficiency of places for 0 – 12 months in our immediate geographical area	Don't know whether there is sufficiency of places for 0 – 12 in our immediate geographical area	Yes there is sufficiency of places for 1 year olds in our immediate geographical area	Yes there is sufficiency of places for 1 year olds in our immediate geographical area	Yes there is sufficiency of places for 1 year olds in our immediate geographical area	Yes there is sufficiency of places for 2 year olds in our immediate geographical area	Yes there is sufficiency of places for 2 year olds in our immediate geographical area	Yes there is sufficiency of places for 2 year olds in our immediate geographical area	Yes there is sufficiency of places for 3 olds in our immediate geographical area	Yes there is sufficiency of places for 3 olds in our immediate geographical area	Yes there is sufficiency of places for 3 olds in our immediate geographical area	Yes there is sufficiency of places for 4 year olds in our immediate geographical area	Yes there is sufficiency of places for 4 year olds in our immediate geographical area	Yes there is sufficiency of places for 4 year olds in our immediate geographical area
Early Years Settings	59%	22%	19%	62%	20%	18%	75%	10%	15%	80%	8%	12%	79%	10%	11%
Registered Childminders	70%	20%	10%	71%	19%	10%	75%	14%	11%	80%	10%	10%	79%	10%	11%

1.15.2 Table 26 indicates that approximately 1 : 5 of all early years childcare providers/settings *did not* feel that there were sufficient childcare places *in their immediate geographical area* for children aged under 2 years – a response which was most frequently given by such providers that were situated within the Alexandra, Muswell Hill, Fortis Green and Highgate wards of the borough.

1.15.3 Table 27 indicates the extent to which term time out of school childcare providers consider that – from their perspective – there is sufficiency of specific types of childcare places within *their immediate geographical area*.

Table 27 - Extent to which term time out of school childcare providers/settings operating in the London Borough of Haringey currently consider there is sufficiency of childcare places for 5 – 14 years

Age Groups of childcare places	Yes there is sufficiency of places for 5 – 11 years	Yes there is sufficiency of places for 5 – 11 years	Yes there is sufficiency of places for 5 – 11 years	Yes there is sufficiency of places for 12 – 14	Yes there is sufficiency of places for 12 – 14	Yes there is sufficiency of places for 12 – 14
Early Years Settings	60%	25%	15%	20%	28%	52%
Registered Childminders	54%	31%	15%	20%	26%	51%

1.15.4 Table 27 indicates that approximately 1 : 4 of term time out of school childcare providers *did not* feel that there were sufficient childcare places *in their immediate geographical area* for children aged *under* 5 – 11 years – a response which was most frequently given by such providers that were situated within the Wood Green Network Learning Community.

c) Findings from Parents and Carers Survey

In 2019, parents and carers responded to three approaches:

1. A series of structured telephone interviews
2. A series of fieldwork interviews – so as to ensure representation from parents and carers from all sections of the borough’s diverse communities
3. An on-line survey, which enabled parents and carers to also feedback at their convenience

The on-line survey was posted on the London Borough of Haringey’s web-site and was promoted through their social media channels – including via the Council’s twitter feed. The following section outlines that *demand-themed* feedback, commencing with...

1.16 Parental Usage of Childcare

1.16.1 All parents were asked the key question, ***which of the following situations applies to yourself and your (sample of 744) children?***

Scenario 1= **Use Formal *registered* childcare only**

Scenario 2 = **Use Formal *registered* and Informal *unregistered* childcare**

Scenario 3 = **Do not use any Formal registered childcare, but may use Informal *unregistered* childcare**

Table 28 below outlines the relevant percentages of parents who stated a particular scenario aligned to them having at least one child aged 0 – 4 years and/or one child aged 5 – 19 years.

Table 28 - Percentages of parents who stated a particular scenario aligned to them having at least one child aged 0 – 4 years and/or one child aged 5 – 19 years

Scenario	Number: Those with at least one 0 – 4 year old	Percentage: Those with at least one 0 – 4 year old	Number: Those with at least one 5 – 19 year old	Percentage: Those with at least one 5 – 19 year old
Scenario 1= Use Formal <i>registered</i> childcare only	273	52%	86	38%
Scenario 2 = Use Formal <i>registered</i> and Informal <i>unregistered</i> childcare	43	8%	17	7.5%
Scenario 3 = Do not use any Formal registered childcare, but may use Informal <i>unregistered</i> childcare	203	39%	122	54%

From the above percentages it can be *reasonably assumed* that approximately (just under) 50% of parents with 0 – 19 year olds resident in the London Borough of Haringey are not – in early 2019 – accessing any formal childcare support and that just

over 50% are accessing at least one type of formal childcare. Parents who were in some form of (full-time or part-time) employment most frequently stated their circumstance(s) as Scenario 1, i.e. Formal *registered* childcare only.

- 1.16.2 In terms of the backgrounds of *all* of the responding parents/carers – firstly they were asked to state a description which they believed *best described* their present circumstances/occupation.

Table 29 - Employment and day-to-day circumstances of parents

Circumstances of respondent	Percentage of respondents
In full-time employment/self-employment (30 hours+/week)	26%
In part-time employment/self-employment (<30 hours/week)	27%
Not currently in work (at home raising children)	25%
Retired	0
Studying full-time	2%
Volunteering	0
Other	9%
I'd rather not say	9%

Table 29 shows that the most frequent classification made by a parent/respondent was them being in part-time employment/self-employment (30 hours+/week), followed (closely) in frequency by being in full-time employment/self-employment (30 hours+/week). The classification full-time was most frequently stated by responding parents who were resident in the Harringay and West Green Network Learning Community.

Therefore, approximately 1 : 2 of the responding parents stated that they were *currently* in a type of paid employment – i.e. they were working parents.

Those who stated 'Other' most frequent further specified: maternity leave (stated by 53 parents).

1.16.3 Parents were also asked to state a description which they believed *best described* the present circumstances/occupation of any partner.
86% of respondents had a partner and the incidence of their circumstances/occupation are presented in Table 30 below.

Table 30 - Circumstances of partners

Circumstances of any partner	Percentage of respondents
In full-time employment/self-employment (30 hours+/week)	74%
In part-time employment/self-employment (<30 hours/week)	9%
Self employed	0
Not currently in work (at home raising children)	2.5%
Retired	<1%
Studying full-time	<1%
Volunteering	<1%
Other	12.5%

Table 30 indicates that the most frequent classification of a partner was them being in full-time employment of over 30 hours/week. Indeed, the majority of partners were evidently *currently* in a type of paid employment – i.e. they were *also* working parents.

1.16.4 In terms of Ethnicity of Parents, Table 31 indicates that the most frequent ethnicity of the parents was White British (one-third of parents), followed in frequency by White Other (18% of parents).

The following responses were repeatedly given by those parents who stated ‘Other’:

- Turkish
- Kurdish
- Somali

Table 31 - Ethnicity of responding parents

Stated Ethnicity	Percentage of parents
White	
White UK	33%
White Other	18%
Asian	
Asian Bangladeshi	1.5%
Asian Indian	1.5%
Asian Pakistani	1.5%
Asian Other	1.5%
Asian Chinese	1%
Black	
Black African	8%
Black Caribbean	9%
Black Other	1%
Mixed	
Mixed White and Black	4%
Mixed White and Asian	1%
Other Mixed	0
Other	
European	7%
South American	1%
Other	5%
Rather not say	6%

- 1.16.5 In terms of the faith of parents, Table 32 indicates that the most frequent faith stated was Christian (33% of parents), followed in frequency by: no religion (32% of parents).

Table 32 - Faith of parents

Stated Faith	Percentage of parents
Buddhist	1%
Christian	35%
Hindu	1%
Jewish	5%
Muslim	11%
Sikh	1%
No religion	32%
Other ⁸	1%
Rather not say	13%

- 1.16.6 In terms of Incidence of children having SEND, all of the responding parents/carers were invited to state whether any of their children had SEND. 5% of the relevant children being raised by responding parents/carers evidently had a type of SEND, detailed in Table 33, and their average age was 5 years.

Table 33 - Incidence of a child having a specific type of SEND

SEND type	Number of relevant children
Speech, Language and Communication Difficulties	9
Autistic Spectrum Conditions	27
Social, Emotional and Mental Health Difficulties	1
Moderate Learning Difficulties	3
Visual Impairment	0
Hearing Impairment	0
Global Development Delay	1
Physical/Mobility Disability	1
Other ⁹	12

Table 33 indicates that the type of SEND which the children and young people aged 0 – 19 years of the responding parents/carers most frequently had was an Autistic Spectrum Condition. 64% of applicable parents stated that they claimed Disability Living Allowance for their applicable child – and 36% stated that they did not.

1.16.7 Table 34 shows the extent to which formal childcare was being accessed aligned to the age group of a child.

Table 34 - Extent to which formal childcare was being accessed aligned to the age group of a child

Circumstance	0 – 12 months Age Group	1 years Age Group	2 years Age Group	3 – 4 years Age Group	5 – 11 years Age Group	12 – 19 years Age Group
Percentage of respondents using some formal childcare	42%	46%	62%	88%	49%	15%
Percentage of respondents using some informal childcare	8%	16%	18%	16%	16%	13%
Percentage of respondents using no childcare	54%	45%	31%	8%	44%	72%

1.16.8 Households with the highest reported income are more likely to use childcare. In terms of Annual Family Household Incomes, Table 35 indicates that the most frequent annual household income (before tax) of responding parents was £30,000 – £54,999. 1 : 12 of the responding parents evidently had an annual household income of £100,000 or over

⁹ The 'Other' SEND types included: Achondroplasia; Cortisol deficiency; Leukemia; Heart condition; Reynold Syndrome; Williams Syndrome.

– which would not affect their eligibility to receive the 30 hours childcare offer as the eligibility allows each parent to earn up to £100,000 each.

Table 35 - Annual family household incomes - (before) tax

Annual Household income (Ranges)	Percentage of respondents
Up to £16,190	8%
£16,190 - £29,999	12%
£30,000 - £54,999	19%
£55,000 - £99,999	17%
£100,000 or above	8%
I don't know	12%
I would rather not say	24%

Table 36 - Incidence of annual family household incomes aligned to Network Learning Community

Network Learning Community	Up to £16,190	£16,190 - £29,999	£30,000 - £54,999	£55,000 - £99,999	£100,000 and above
Highgate/Muswell Hill	0%	9%	17%	19%	5%
Hornsey/Stroud Green	2%	8%	18%	32%	18%
Wood Green	14%	15%	18%	19%	7%
Harringay/West Green	6%	9%	17%	15%	10%
North East Tottenham	14%	13%	14%	13%	4%
South East Tottenham	10%	14%	22%	17%	7%
Average	8%	12%	19%	17%	8%

Note: additional responses included: don't know and rather not say – see Table 35

Table 37 outlines the incidence of formal childcare usage aligned to annual household income amount, with formal childcare most frequently being accessed by those whose annual household income was less than £16,190.

Table 37 - Use of childcare by reported annual household income

Reported Household Income	Up to £16,190	£16,190 - £29,999	£30,000 - £54,999	£55,000 - £99,999	£100,000 +
Percentage of respondents using formal childcare	71%	58%	44%	60%	64%

1.16.9 Table 38 below indicates that the use of formal childcare was highest in the Network Learning Community of Hornsey/Stroud Green – which also had the highest reported levels of household income, and lowest in Network Learning Community North East Tottenham.

Table 38 - Incidence of usage of formal childcare aligned to (a) ward and (b) Network Learning Community

Ward and Network Learning Community	Percentage of respondents using formal childcare
Network Learning Community: Highgate/Muswell Hill	
Alexandra	35%
Fortis Green	56%
Highgate	50%
Muswell Hill	80%
Average NLC	56%
Network Learning Community: Hornsey/Stroud Green	
Crouch End	56%
Hornsey	74%
Stroud Green	70%
Average NLC	68%
Network Learning Community: Wood Green	
Bounds Green	52%
Noel Park	55%
Woodside	50%
Average NLC	62%
Network Learning Community: Harringay/West Green	
Harringay	65%
St. Ann's	47%
West Green	53%
Average NLC	53%
Network Learning Community: North East Tottenham	
Northumberland Park	38%
White Hart Lane	78%
Average NLC	43%
Network Learning Community: South East Tottenham	
Bruce Grove	56%
Seven Sisters	43%
Tottenham Green	49%
Tottenham Hale	36%
Total NLC	48%

1.16.10 In terms of use of childcare by all responding parents/carers, Table 39 and Table 40 below indicates that the use of childminding is highest for the youngest age range of children.

Use of family members to provide childcare is relatively high across all age ranges but particularly for the youngest age range of children. Use of a day nursery was, as would be expected, high for the 2 year old and 3 – 4 year old age ranges.

Table 39 - Evident childcare usage for children aged 0 – 4 years, aligned to total children being raised by all parents that have a child in relevant age group

Age Group	PVI Sector Day Nursery	Pre-School/Playgroup	Maintained Nursery Class or Nursery School	Registered Childminder	Out of School Childcare	Grandparents	Other family members	Friends	Au-Pair	Other
Under 2 years	13%	0	0	7%	0	9%	3%	0	1%	1%
2 years	46%	2%	1%	5%	0	13%	2%	0	3%	5%
3 – 4 years	54%	2%	19%	3%	3%	10%	2%	0	3%	5%

Table 39 and Table 40 indicates that family and friends play an important role in the childcare mix for younger and older children, and in particular for children aged 3 – 4 years.

Table 40 - Evident childcare usage for children aged 5 – 17 years, aligned to total children being raised by all parents that have a child in relevant age group

Age Group	After School Club	Breakfast/Before School Club	Holiday Playscheme	Registered Childminder	Grandparents	Other family members	Friends	Au-Pai	Other
5 – 11 years	15%	5%	6%	2%	12%	3%	2%	2%	0
12 – 14 years	0	0	0	0	14%	9%	0	2%	0

1.16.11 All responding parents of 0 – 19 year olds were invited to state how satisfied they were with their present childcare arrangements, i.e. the extent to which they currently met their needs. Table 41 presents the frequency with which they provided certain responses aligned to their childcare circumstances and the age groups of their children.

Table 41 - Extent to which parents, that were formal childcare users only, were satisfied with that arrangement aligned to age cohorts

Satisfaction Level	Parent with at least one under 1 year old	Parent with at least 1 year old	Parent with at least one 2 year old	Parent with at least one 3-4 year old	Parent with at least one 5-11 year old	Parents with at least 12-14 year old
Percentage of respondents stating Very Satisfied or Quite Satisfied	95%	89%	91%	95%	94%	88%

Table 42 - Extent to which parents, who did not use any childcare, were satisfied with that arrangement aligned to age cohorts

Satisfaction Level	Parent with at least one under 1 year old	Parent with at least 1 year old	Parent with at least one 2 year old	Parent with at least one 3-4 year old	Parent with at least one 5-11 year old	Parents with at least 12-14 year old
Percentage of respondents stating Very Satisfied or Quite Satisfied	89%	91%	96%	94%	95%	95%

1.17 Feedback from parents who evidently used formal registered childcare

1.17.1 Applicable parents were invited to state what type(s) of formal childcare that their child(ren) were accessing.

Table 43 - Incidence of usage of formal childcare by applicable children aged 0 – 4 year olds

Type of formal childcare	Accounted for the following percentage of total usage by the relevant children aged 0 – 4 years
PVI sector day nursery – full or part-time	66%
Pre-school or playgroup i.e. sessional childcare	2%
Maintained nursery class	15%
Registered childminder	10%
After school club	1%
Breakfast club	1%
Holiday playscheme	1%
Other ¹⁰	8%

¹⁰ Most frequently: Nursery at a Children’s Centre, followed in frequency by a Home Childcarer.

Table 44 - Incidence of usage of formal childcare by applicable children aged 5 – 19 year olds

Type of formal childcare	Accounted for the following percentage of total usage by the relevant children aged 5 – 19 years
PVI sector day nursery – full or part-time	0
Pre-school or playgroup i.e. sessional childcare	0
Maintained nursery class	0
Registered childminder	11%
After school club	86%
Breakfast club	20%
Holiday playscheme	29%
Other ¹¹	0

The most frequent type of childcare – evidently being accessed by those parents/children who were only using formal childcare was a PVI sector day nursery an after school club and a registered childminder.

The most frequent reason stated for using formal childcare was: so that I can go to work or study (69% of applicable parents – who were most frequently resident in the Highgate and Muswell Hill Network Learning Community).

The second most frequent reason stated for using formal childcare by this cohort of respondents was: so that my children can socialise and play with other children (57% of applicable parents). In terms of (the question) *what was important to parents when choosing a formal childcare setting?*, the most frequent response was: that it was close to home (90% of applicable parents), followed in frequency by: the childcare setting being close to another of my children’s school(s). Finally, applicable parents were invited to state whether they intended to use any formal childcare in the next two years, which they were not, in early 2019, currently accessing. 19% of applicable parents stated that they did, and this was most frequently, in terms of early years childcare, a maintained nursery class (stated by 7% of applicable parents, who were most frequently resident in the Harringay and West Green Network Learning Community), and in terms of out of school childcare, an after school club (stated by 1 : 4 of applicable parents, who were most frequently resident in the South East Tottenham Network Learning Community).

1.17.2 In terms of this cohort’s **experiences of formal childcare usage...**

applicable parents were invited to outline the number of hours/week they accessed formal childcare in the term-time period and during the (school) holidays. For term-time(s), the average number of weekly hours stated was 23. The most frequent number of hours stated was, as would be expected, 30 followed by 40. For holiday time(s), the average number of weekly hours stated was 13. The most frequent number of hours stated was 40 followed by 30 (the opposite metrics as to what were observed for term-times (see above)).

¹¹ Most frequently: Nursery at a Children’s Centre, followed in frequency by a Home Childcarer.

1.17.3 Parents of 0 – 4 and 5 – 19 year olds who stated that they were accessing formal childcare (only) in early 2019 were invited to state if *they* had ever experienced any barriers to accessing early years childcare.

Table 45 presents the frequency with which they provided specific responses:

Table 45 - Incidence of barriers experienced by responding parents of 0 – 4 year olds and 5 – 19 year olds who were accessing formal childcare (only) in early 2019

Barrier type	Percentage of applicable parents
None – I have never experienced a barrier(s)	62%
I could not/cannot find a space for my child at a chosen childcare provider	5%
I could not/cannot find a childcare provider to offer the times/hours that I need	6%
I could not/cannot afford the childcare that I require	27%
I had doubts about the quality of provision	6%
Preferred provider had a waiting list	7%
Other	4%

Note: Individual parents were able to state multiple barriers.

Encouragingly almost two-thirds of applicable parents, of both 0 – 4 year olds and 5 – 19 year olds, stated that they had not – at any point in time – experienced any of the barriers presented in Table 45 above. However, Table 45 does indicate that the most frequent barrier that *had been* experienced by those parents who were accessing formal early years childcare (only) was: I could not/cannot afford the childcare that I require (1 : 4 of applicable respondents), followed in frequency by a relevant parent – most frequently of a 0 – 4 year old – stating: my preferred provider had a waiting list. The applicable responding parents who stated: I could not/cannot afford the childcare that I require were most frequently resident in the North West Tottenham Network Learning Community. The applicable responding parents who stated: my preferred provider had a waiting list were most frequently resident in the Harringay and West Green Network Learning Community and these were most frequently parents of 0 – 4 year olds.

The most frequent ‘Other’ barrier stated was (words to the effect) *“It is hard to find a place at a childcare setting for an under 1 year old”*.

1.17.4 Parents who stated that they were accessing formal childcare (only) in early 2019 and who had at least one child aged 3 or 4 years were invited to state whether they were accessing the 30 hours childcare offer?

37% of relevant parents stated that they were and 63% of parents stated that they were not. Parents of 3 or 4 year olds who stated *that they were* accessing a 30 hours childcare offer place in early 2019 were most frequently resident in the Stroud Green ward.

Parents of 3 or 4 year olds who stated *that they were not* accessing a 30 hours childcare offer place in early 2019 were most frequently resident in the Tottenham Green ward.

1.17.5 The parents of 3 and 4 year olds *who were* accessing the 30 hours childcare offer, were invited to state whether they considered that the 30 hours childcare offer was helping them and/or a partner to remain in work or to take up employment...

79% of applicable parents stated: Yes, it has helped me and/or a partner to remain in employment/self-employment/a job.

5% of applicable parents stated: Yes, it has helped me and/or a partner to take up a part-time job/part-time self-employment.

5% of applicable parents stated: Yes, it has helped me and/or a partner to take up a full-time job/full-time self-employment.

11% of the applicable parents stated that their (working) circumstance(s) had not been in anyway affected by the childcare offer.

1.17.6 Additionally, the responding and applicable (formal childcare only using) parents of 3 and 4 year olds, *who were* accessing the 30 hours childcare in early 2019 were invited to state how 'easy' they had found securing a 30 hours childcare place.

- 44% of applicable parents stated: it was very easy
- 37% of applicable parents stated: It was fairly straightforward
- 10% of applicable parents stated: It was not as easy as I would have liked
- 8% of applicable parents stated: It was complicated and/or stressful
- 3% of applicable parents stated: none of the above

Those applicable parents who stated (a) It was not as easy as I would have liked or (b) It was complicated and/or stressful were most frequently resident in the Noel Park ward. The same cohort of responding parents were requested to state the reason(s) for their response. The most frequent reason was evidently (words to the effect):

"The system is too complicated/difficult" i.e. reconfirmation process.

The second most frequent reason was evidently (words to the effect):

"My preferred setting did not offer the 30 hours".

Additional *repeated* types of responses included:

"Having to re-confirm my eligibility every three months".

"It's a time-consuming process, especially having to go through HMRC".

“Found it a stressful process to set up”.

- 1.17.7 The responding and applicable (formal childcare only using) parents of 3 and 4 year olds, *who were* accessing the 30 hours childcare offer were invited to state the type of venue(s) where their child(ren) attended such a place in early 2019 – see Table 46 below.

Table 46 - Frequency with which applicable children of ‘users’ of the 30 hours childcare offer had therefore accessed – or were accessing – such a place

Type of early years childcare provider	Percentage of applicable children
PVI sector day nursery – full or part-time	75%
Pre-school or playgroup i.e. sessional childcare	0
Maintained nursery class	17%
Registered childminder	2%

Table 46 *indicates* that the type of London Borough of Haringey-based early years childcare provider that was being accessed in early 2019 in order to take-up a 30 hours childcare offer place was – by a significant margin – a PVI sector day nursery, followed in frequency by a maintained school nursery class. It was observed that only 2% of applicable parents of 3 and/or 4 year olds were accessing a 30 hours childcare offer place with a registered childminder.

The same cohort of parents was requested to confirm how many hours (up to 30) they had normally accessed the offer on a typical applicable week.

The most frequently stated number of such hours was – as would be expected – 30. The average number stated was 29 hours – and 45 minutes.

- 1.17.8 63% of the responding parents of 3 and 4 year olds (were only using formal childcare at the time of the research) were not however accessing the 30 hours childcare offer. Table 47 indicates the frequency with which reasons why this was the case were stated by applicable parents of 3 and 4 year olds.

Table 47 - Reasons why (formal childcare using only) parents of 3 and 4 year olds were not accessing the 30 hours childcare offer

Reason	Percentage of applicable parents
I do/did not <i>think</i> that I am/was eligible for the 30 hour childcare offer	83%
I do/did not <i>know if</i> I am/was eligible to use the 30 hour childcare offer	0
I do/did not know how to register for the 30 hour childcare offer	0
I do/did not <i>need to</i> use the 30 hour childcare offer	2%
I do/did not <i>want to</i> use the 30 hour childcare offer	1%
I prefer to access the universal 15 hours free entitlement for 3 and 4 year olds	3%
I cannot/could not find a suitable childcare provider who offers a place	0
I cannot/could not find a childcare provider that can offer suitable times for me to use the 30 hour childcare offer	0
Extra charges made/make the 30 hours inaccessible for me, at my chosen provider	0
Other	11%

Table 47 outlines that the most frequent reason why a responding – formal childcare using – parent of at least one child aged 3 and/or 4 years was not accessing the 30 hours childcare offer within the London Borough of Haringey was: I do/did not *think* that I am/was eligible for the 30 hour childcare offer. This response was most frequently stated by applicable parents that were resident in the South East Tottenham Network Learning Community. Those applicable parents who stated ‘Other’ most frequently stated (words to the effect):

“My child is just about to start in a Reception class”.

- 1.17.9 The responding (formal childcare only using) parents of 3 and 4 year olds who were not accessing the 30 hours childcare offer during early 2019 stated that *if a 3 – 4 year old of theirs did so in the future*, they most frequently envisaged that this would be at a PVI sector day nursery – and that they would seek to access the full 30 hours.
- 1.17.10 All responding parents who were evidently accessing formal childcare only and who had at least one child aged 2 years were invited to state whether they were accessing a funded entitlement for 2 year olds place in early 2019. (Only) 12% of applicable responding parents stated that they were.

88% of applicable responding parents stated that they were not and the two most frequent reasons for this position were (in order of frequency):

1. (In the majority of cases) I am not eligible to receive the funded entitlement for 2 year olds
2. I am eligible, but do not feel I need to use the entitlement (a statement most frequently made by relevant parents that were resident in the Woodside ward

1.18 Feedback from parents who evidently used formal registered childcare and informal childcare (such as grandparents, other family members and friends)

1.18.1 Applicable parents were invited to state what type(s) of formal childcare and informal childcare that their child(ren) were accessing.

Table 48 - Incidence of usage of formal and informal childcare by applicable children aged 0 – 19 year olds

Type of formal and informal childcare	Accounted for the following percentage of total usage by the relevant children aged 0 – 4 years
Formal childcare	
PVI sector day nursery – full or part-time	61%
Pre-school or playgroup i.e. sessional childcare	3%
Maintained nursery class	5%
Registered childminder	5%
After school club	2%
Breakfast club	2%
Holiday playscheme	2%
Informal childcare	
Grandparents	69%
Other family member(s)	12%
Friends	2%
Nanny/Au-pair	12%

Table 49 - Incidence of usage of formal and informal childcare by applicable children aged 5 – 19 year olds

Type of formal and informal childcare	Accounted for the following percentage of total usage by the relevant children aged 5 – 19 years
Formal childcare	
PVI sector day nursery – full or part-time	0
Pre-school or playgroup i.e. sessional childcare	0
Maintained nursery class	0
Nursery school/class in an independent school	0
Registered childminder	10%
After school club	40%
Breakfast club	35%
Holiday playscheme	25%
Informal childcare	
Grandparents	75%
Other family member(s)	20%
Friends	20%
Nanny/Au-pair	10%

The most frequent type of formal or informal childcare – being accessed by those parents who were using both, was grandparents, followed in frequency by a PVI sector day nursery and an after school club.

- 1.18.2 Applicable parents were invited to outline the number of hours per week *they accessed their formal childcare element* in the term-time period and during the (school) holidays.

For term-time(s), the average number of weekly hours stated was approximately 18. The most frequent number of hours stated was, as would be expected, 30 followed by 15.

For holiday time(s), the average number of weekly hours stated was approximately 12. The most frequent number of hours stated was 18.

- 1.18.3 Parents of 0 – 19 year olds who stated that they were accessing at least one type of formal childcare *and* at least one type of informal childcare place in early 2019 were invited to state if *they* had ever experienced any barriers to accessing *formal* early years childcare. Table 50 presents the frequency with which they provided specific responses:

Table 50 - Incidence of barriers experienced by parents of 0 – 4 year olds and 5 – 19 year olds who were accessing at least type of formal and informal childcare place in early 2019

Barrier type	Percentage of applicable parents
None – I have never experienced a barrier(s)	50%
I could not/cannot find a space for my child at a chosen childcare provider	8%
I could not/cannot find a childcare provider to offer the times/hours that I need	10%
I could not/cannot afford the childcare that I require	33%
I had doubts about the quality of provision	8%
I did not know where to find information about childcare	6%
Religious/cultural reasons	2%
Preferred provider had a waiting list	4%
There is nothing suitable for my child with SEND	2%
Other	6%

Note: Individual parents were able to state multiple barriers.

Encouragingly 50% of applicable parents stated that they had not – at any point in time – experienced any of the barriers presented in Table 50 above. However, Table 50 indicates that the most frequent barrier that *had been* experienced by those parents who were accessing at least one type of formal early years childcare *and* at least one type of informal childcare was being unable to afford their preferred childcare (1 : 3 of applicable parents who were most frequently referring to a child aged 0 – 4 years), followed in frequency by a relevant parent (commonly of 0 – 4 year old) stating: I could not/cannot find a childcare provider to offer the times/hours that I need.

The most frequent 'Other' barrier stated was (words to the effect) *“My worries about leaving with child with someone else”*.

- 1.18.4 Parents of 0 – 19 year olds who stated that they were accessing at least one type of formal childcare *and* at least one type of informal childcare place in early 2019 were invited to state how satisfied they were with their present childcare arrangements. Table 51 presents the frequency with which they provided certain responses:

Table 51 - Satisfaction among users of formal childcare about their existing arrangements

Degree of Satisfaction	Percentage of applicable parents
Very Satisfied	67%
Quite Satisfied	25%
Quite Dissatisfied	2%
Very Dissatisfied	4%
Not Sure	2%

Table 51 indicates that approximately 6% of users of at least one type of formal childcare *and* at least one type of informal childcare place in early 2019 were, to some degree, not satisfied with their current arrangements. The response Quite or Very Dissatisfied, when provided, tended to originate from an applicable respondent who was resident in the Wood Green Network Learning Community.

- 1.18.5 The sample of parents who stated that they were accessing at least one type of formal childcare *and* at least one type of informal childcare place who had at least one child aged 3 – 4 years were invited to state whether they were accessing the 30 hours childcare offer in early 2019. 50% of all of the relevant responding parents were accessing the 30 hours childcare offer during its first year of full roll-out.

- 1.18.8 The applicable sample of parents of 3, 4 and 5 year olds, *who had* accessed the 30 hours childcare offer were invited to state the type of venue(s) where their child(ren) had attended such a place – see Table 52 below.

Table 52 - Frequency with which applicable children of 'users' of the 30 hours childcare offer had therefore accessed – or were accessing – such a place during the period September 2017 – February 2019 at a specific type of venue

Type of early years childcare provider	Percentage of applicable children
PVI sector day nursery – full or part-time	60%
Pre-school or playgroup i.e. sessional childcare	20%
Maintained nursery class	10%
Registered childminder	10%

Table 52 *indicates* that the type of London Borough of Haringey-based early years childcare provider that was being accessed during the period (autumn) 2017 – (spring) 2019 in order to take-up a 30 hours childcare offer place by applicable parents was – by

a significant margin – a PVI sector day nursery, followed in frequency by a pre-school/playgroup. It was observed that (only) 10% of applicable parents of 3 and/or 4 year olds had accessed a 30 hours childcare offer place at a registered childminder. The same cohort of parents was requested to confirm how many hours (up to 30) they had normally accessed on a typical applicable week. The most frequently stated number of such hours was – as would be expected – 30.

- 1.18.9 50% of the responding parents of 3, 4 and 5 year olds who stated that they were accessing at least one type of formal childcare *and* at least one type of informal childcare at the time of the research *had not* however accessed the 30 hours childcare offer during its first year of full roll-out... In the majority of cases this was because they were not or did not consider themselves eligible to do so.
- 1.18.10 All responding parents who were evidently accessing formal childcare and informal childcare and who had at least one child aged 3 and/or 4 years were (also) invited to state whether they were accessing the universal 15 hours funded entitlement for 3 and 4 year olds place in early 2019. 41% of applicable responding parents stated that they were. 59% of applicable responding parents stated that they were not – and this was (by a significant margin) most frequently (now) due to the advent of the 30 childcare offer, which they were now accessing instead, or soon to be accessing (85% of applicable respondents).
- 1.18.11 All responding parents who were evidently accessing formal childcare and informal childcare and who had at least one child aged 2 years were invited to state whether they were accessing a funded entitlement for 2 year olds place in early 2019. (Only) 12% of applicable responding parents stated that they were (and such parents were most frequently resident in the Tottenham Hale ward). 88% of applicable responding parents stated that they were not and the single stated repeated reason for this position was: I am not eligible to receive the funded entitlement for 2 year olds.

1.19 Feedback from parents who do not use any formal registered childcare, but who may use informal *unregistered* childcare

1.19.1 14% of applicable parents were accessing at least one type of informal childcare.

Table 53 - Incidence of usage of informal childcare by children of responding parents of 0 – 4 year olds

Type of informal childcare	Accounted for the following percentage of total usage by the relevant children aged 0 – 4 years
Grandparents	69%
Other family member(s)	22%
Friends	0
Nanny/Au-pair	17%
Other	0

Table 53 indicates that the most frequent type of informal childcare – being accessed by applicable parents was grandparents, followed in frequency by friends. It was observed that the Tottenham Hale ward accounted for the most pronounced use of grandparents by applicable parents.

Table 54 - Incidence of usage of informal childcare by children of responding parents of 5 – 19 year olds

Type of informal childcare	Accounted for the following percentage of total usage by the relevant children aged 5 – 19 years
Grandparents	96%
Other family member(s)	35%
Friends	4%
Nanny/Au-pair	15%
Other	4%

Table 54 indicates that the most frequent type of informal childcare – being accessed by applicable parents was grandparents, followed in frequency by friends. It was observed that the Tottenham locality accounted for (by a significant margin) the most pronounced use of grandparents by applicable parents.

- 1.19.2 Parents who *did not access any formal childcare* were therefore requested to confirm why they were not currently doing so.

Table 55 - Reasons for not accessing formal childcare

Reason(s) for not accessing formal childcare	Percentage of responses
I do not need formal childcare	51%
I find formal childcare too expensive	27.5%
I prefer my children to be looked after by family and/or friends	12.5%
I do not want to use formal childcare	11.5%
I don't receive financial assistance to help me pay for childcare	4.5%
I think my child(ren) are better looked after by family or friends	4%
(As far as I know) there are no vacancies in my area	4%
There are no suitable/preferred places local to me	3.5%
Concerns about leaving my child with people I don't know	3.5%
I do not trust the quality of childcare	3%
Formal childcare is not reliable enough	1%
No suitable childcare to meet special needs or disabilities	1%
Other	14%

Note: parents were able to state multiple reasons.

Those applicable (27.5% of) parents who stated: I find formal childcare too expensive were most frequently resident in the South East Tottenham Network Learning Community area.

Those parents who stated 'Other' reason(s), repeatedly – i.e. in 15 or more cases – fed back (words to the effect) that:

"I feel my child is too young for formal childcare", and...

"...because I am currently on maternity leave".

- 1.19.3 None of the applicable respondents were accessing either (a) the funded entitlement for 2 year olds (b) the universal 15 hours funded entitlement for 3 and 4 year olds or (c) the 30 hours childcare offer. It was evident that the majority of such parents with a 2 – 4 year old had heard of all three entitlements, however they either did not want to access one, or in the case of the free entitlement for 2 year olds, they were not eligible to do so.
- 1.19.5 Responding and applicable parents with at least one 0 – 2 year old(s) were invited to state whether they believed that they might access the 30 hour childcare offer in the future for any of their applicable children. Approximately 70% stated that they did, and they most frequently envisaged that this would be with a PVI sector day nursery.

The same cohort of parents were invited to state how many hours of the (maximum) 30 they *envisaged* they would potentially take-up – should they access the 30 hours childcare offer in the (near) future? The most frequently stated number was 30 hours and the average number of hours stated was 29 hours and 6 minutes.

1.19.6 Parents of 0 – 4 year olds and 5 – 19 year olds who *did not access any formal childcare* were invited to state what they would look for, if they were to consider accessing formal childcare provision.

Table 56 presents the frequency with which they stated specific responses.

Table 56 - Features which non-users of formal childcare evidently would look for if/when they considered accessing such provision

Feature	Percentage of applicable parents
Not applicable as I won't	27%
Good quality childcare	63%
Affordable childcare	39%
For it to be close to my home	36%
For it to be close to my work	36%
Flexible Hours/Ad hoc availability	26%
For there to be play opportunities	18%
Social opportunities for my child(ren)	18%
Somewhere I can use one of the free entitlements	13.5%
Transport to be straightforward	8%
Choice of different childcare types	6%
For it to be close my children's school	4.5%
To have it funded via Universal Credit or Tax-Free Childcare	4%
Provision for additional needs/disabilities	2%
Other	9%

Table 56 indicates that the most frequent feature which those responding parents who were only accessing informal childcare in early 2019 stated that they would welcome if they were to consider accessing such provision was good quality childcare, followed in frequency by affordable childcare (which was most frequently stated by parents who were resident in the Northumberland Park ward).

The response (for there to be) flexible hours/ad hoc availability was most frequently stated by parents who were resident in the Tottenham locality.

The response "Other" was most frequently further clarified to be (words to the effect): *"For there to be good educational opportunities for my child"*.

2 Supply analysis

This second section of the 2019 Haringey Childcare Sufficiency Assessment focuses on the (subjects and issues related to the) supply childcare.

2.1 Fundamental supply and quality of childcare in the London Borough of Haringey

2.1.1 Table 57 below present three key indicators – by type of childcare provider –aligned to the entire London Borough of Haringey locality:

1. Number of childcare providers by ward
2. Total Number of places in the ward
3. Percentage of childcare providers with a Good or Outstanding Ofsted

Table 57 - Supply and quality in early 2019 observed across the London Borough of Haringey

Type of Provider	Number of providers in Haringey	Total number of places in Haringey	% with Met, Good or Outstanding Ofsted
Early Years Childcare			
PVI Day Nursery	61	2,791	83% 6 = No Ofsted yet
Maintained School Nursery Class	46	2,673	98%
Pre-School Playgroup	15	327	87%
Maintained Nursery School	3	1,353	100%
Local Authority Children's Centre Day Nursery ¹²	5	435	100%
Registered Childminder			
	177	1,096	79% 10 = No Ofsted yet
Out of School Childcare			
After School Club	40	1,397	60% 18 = No Ofsted yet
Before/ Breakfast Club	36	1,342	97% 1 = No Ofsted yet
Holiday Playscheme	9	310	55% 6 = No Ofsted yet

¹² Accounts for three Children's Centres and Stonecroft Nursery Triangle Children, Young People and Community Centre

2.2 Providers Audit - Periods that provision typically operates

2.2.1 Table 58 - Frequency with which the responding London Borough of Haringey's early years childcare providers state that they typically operate

(Annual) period of availability	Percentage of PVI settings	Percentage of maintained nursery classes	Percentage of registered childminders
Term-time only	33%	93%	8%
All-year round	67%	7%	92%
Other	0	0	0

2.2.2 Table 58 indicates that the most frequent annual period of accessibility/availability reported by early years childcare settings was term-time only, whilst registered childminders also most frequently stated all-year round.

2.2.3 Table 59 indicates the (a) most frequent weekday start time and the (b) evident most frequent weekday finish time stated by *responding* early years childcare providers/settings and registered childminders. It also indicates the average weekday start time and the average weekday finish time that was reported.

Table 59 - Evident most frequent weekday start times and the evident most frequent weekday finish times stated by responding early years childcare providers/settings and registered childminders

Type of early years childcare provision	Most frequent opening/ start time	Most frequent closing/ finish time	Average opening/ start time	Average closing/ Finish time
PVI Setting	8.30am	6.00pm	8.06am	5.07pm
Maintained Nursery Class	8.45am	3.30pm	8.28am	3.29pm
Registered childminder	8.00am	6.00pm	8.05am	6.06pm

2.2.4 Table 60 indicates the (a) most frequent weekday start time and the (b) evident most frequent weekday finish time stated by *responding* out of school childcare providers/settings. It also indicates the average weekday start time and the average weekday finish time that was reported.

Table 60 - Evident most frequent weekday start times and the evident most frequent weekday finish times stated by responding out of school childcare providers

Type of out of school provision	Most frequent opening/ start time	Most frequent closing/ finish time	Average opening/ start time	Average closing/ finish time
After School Club	3.15pm	6.00pm	3.20pm	6.20pm
Breakfast Club	7.00am	8.45am	7.20am	8.37am
Holiday Playscheme	8.30am	6.00pm	8.23am	5.10pm

2.2.5 All of the term time out of school childcare representatives were asked whether their setting provides any collection services as part of their offer (for example, a bus to take children to or from their school from to your childcare site). 45% of after school clubs stated that they did and this was most frequently a ‘walking bus’¹³ followed in frequency by a mini bus collection. The Wood Green Network Learning Community area most frequently accounted for such an offer, followed in frequency by the North East Network Learning Community area. 20% of breakfast clubs stated that they did and this was most frequently a ‘walking bus’ to the schools.

¹³ A walking bus is a form of transporting pupils from one site to another. This may be from a breakfast club to a school, or a school to an after school club. Children are escorted by a minimum of 2 adults, with designated ‘bus stops’ to pick-up children.

2.3 Supply of funded entitlement places – and feedback about the evolving 30 hours childcare offer

2.3.1 All *responding* (a) PVI settings and (b) maintained nursery classes were invited to state whether they were offering 30 hours childcare places at their setting in 2019. 80% of PVI settings and 95% of maintained nursery classes stated that they were.

Diagram 19 - Incidence of take-up and potential future provision of 30 hours childcare offer places – as stated by responding PVI settings in 2019 that are located in each of the 19 wards

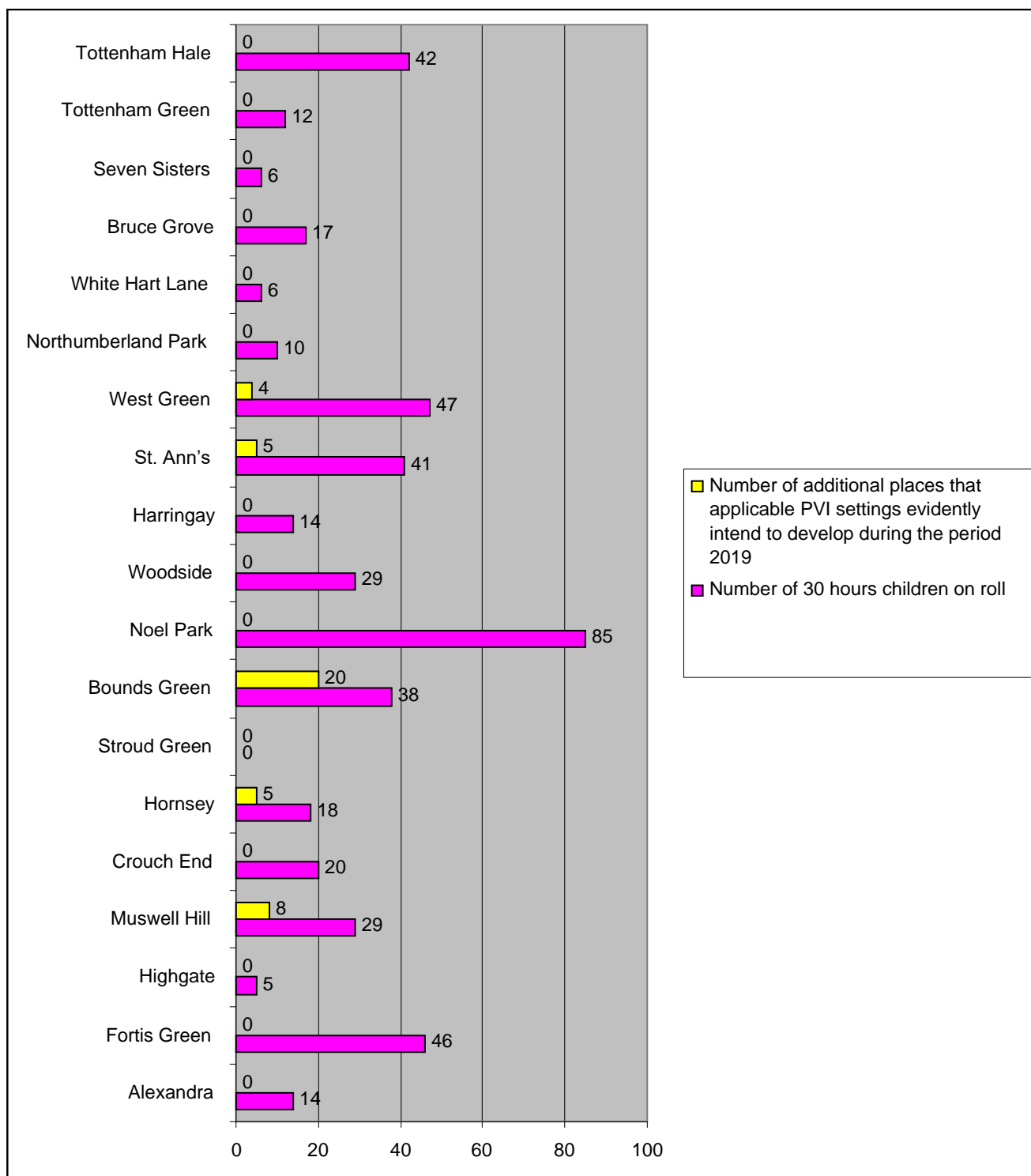


Diagram 20 - Incidence of take-up and potential future provision of 30 hours childcare offer places – as stated by responding maintained nursery classes in 2019 that are located in each of the 19 wards

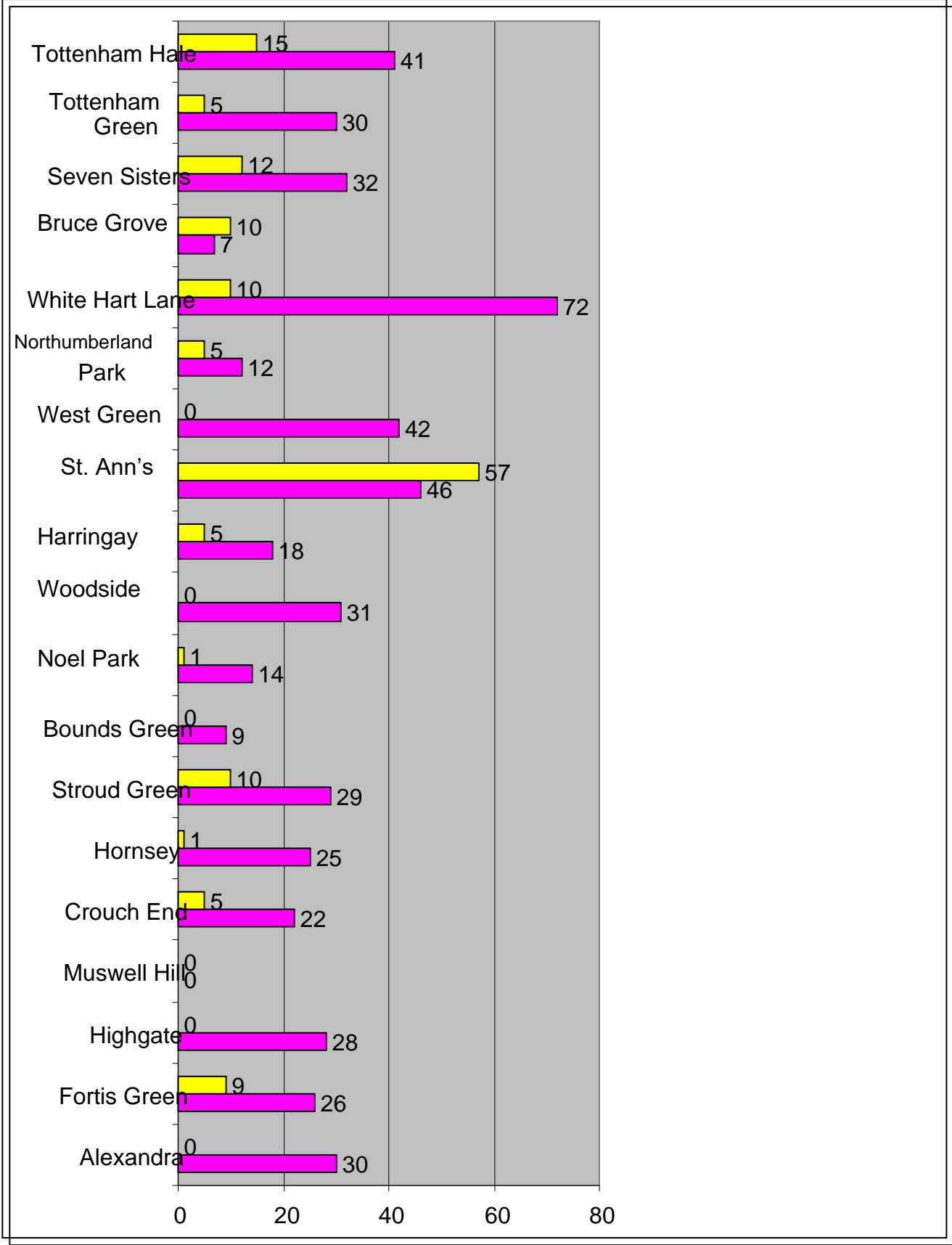
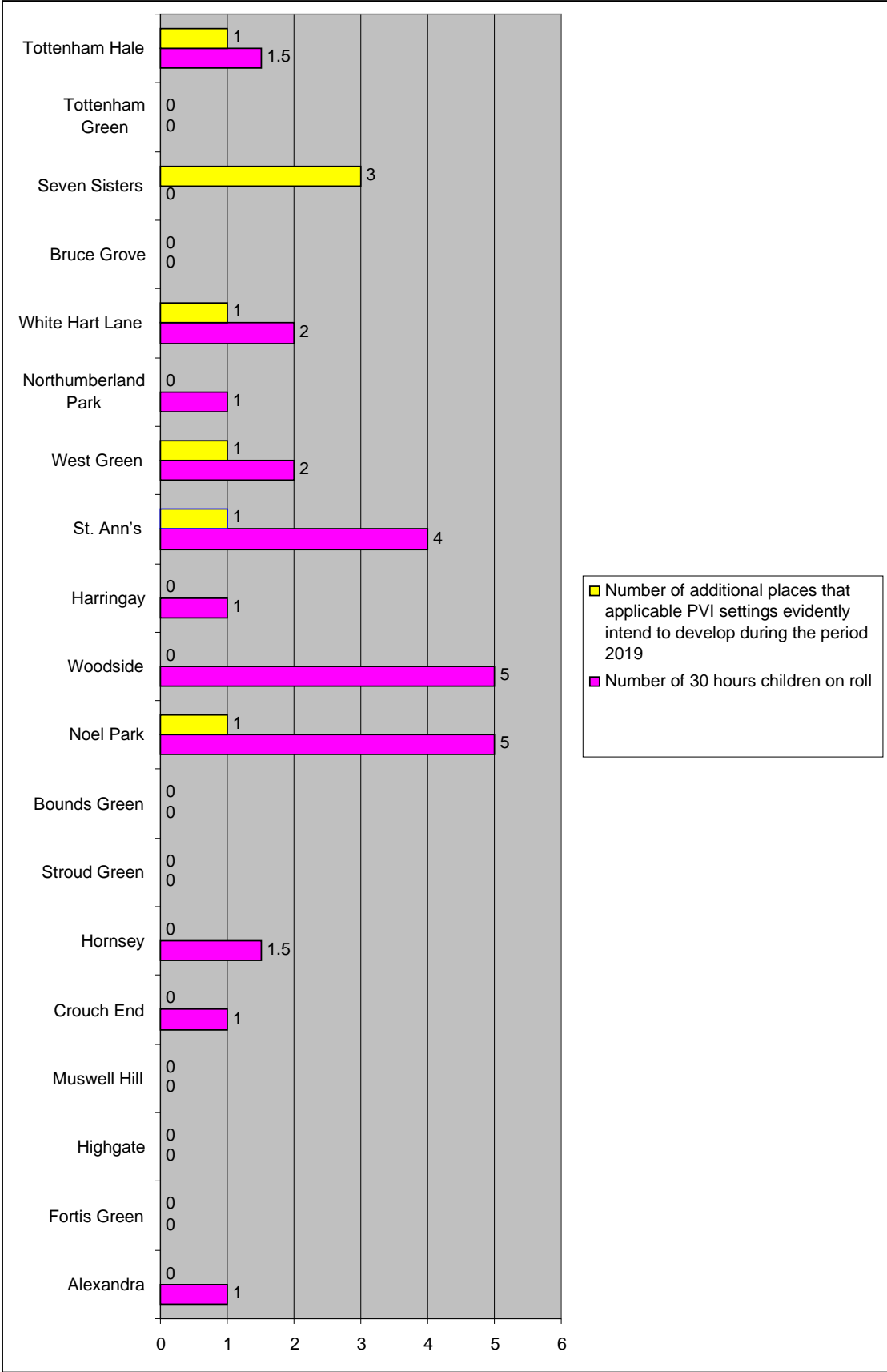


Diagram 21 - Incidence of take-up and potential future provision of 30 hours childcare offer places – as stated by responding registered childminders in 2019 that are located in each of the 19 wards



The three wards which accounted for the *highest* number of 3 and 4 year olds on roll, and occupying 30 hours childcare offer places within PVI settings in 2019 were: 1. Noel Park ward, which borders... 2. West Green ward, 3. Fortis Green ward.

All *responding* PVI settings that *offered* 30 hours childcare places were invited to state whether they had a set/definite number of such places in 2019. 11% stated that they did have a set/definite number of places that they offered – and 89% stated they did not.

- 2.3.2 All *responding* and applicable (a) early years childcare providers/settings and (b) registered childminders were invited to outline whether they had – in 2019 – any partnership arrangements with other childcare providers, which allowed/enabled parents to use their 30 hours with *more than one provider*.

10% of early years childcare providers/settings stated that they did have such partnership arrangements – and 90% evidently did not. Those early years childcare providers/settings who did evidently have a partnership arrangement in 2019 most frequently stated that this was with another day nursery, followed in frequency by being with a registered childminder.

The early years childcare providers/settings that had not evolved partnership arrangements aligned to the 30 hours childcare offer were asked whether they would be interested in developing such a partnership.

21% of applicable childcare providers stated: Yes, 26% stated: Maybe and 54% stated: No. The highest incidence of a statement of: Yes or: Maybe was observed in the Northumberland Park ward.

- 2.3.3 (Only) 6% of registered childminders stated that they did have partnership arrangements aligned to the 30 hours childcare offer – and 94% evidently did not. Those registered childminders that did evidently have a partnership arrangement in 2019 most frequently stated that this was with a PVI sector day nursery. (There were (only) 0 examples of a partnership arrangement existing between two responding childminders). The registered childminders who had not evolved partnership arrangements aligned to the 30 hours childcare offer were asked whether they would be interested in developing such a partnership. 23% stated: Yes (notably in the Fortis Green ward); 25% stated: Maybe and 52% stated: No.

- 2.3.4 All *responding* and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders were requested to state whether they believed that
1. themselves and/or 2. their parents would continue to benefit from more information about the 30 hours childcare offer, including going in to 2019, the second year of *full* roll out...

Table 61 indicates the frequency with which the three types of early years childcare provider considered that they, themselves, would benefit from the receipt of information about specific features of the 30 hours childcare offer.

Table 61 - Frequency with which early years childcare provider considered that they would benefit from the receipt of information about a specific feature of the 30 hours childcare offer

Feature/element of the 30 hours childcare offer	Percentage of responding PVI settings stating <i>that they</i> would continue to benefit from (more) information about...	Percentage of responding maintained nursery classes stating <i>that they</i> would continue to benefit from (more) information about...	Percentage of responding registered childminders stating <i>that they</i> would continue to benefit from (more) information about...
Understanding the eligibility criteria	25%	3%	32%
Accessing or using the childcare provider portal	35%	10%	37%
Partnership arrangements between childcare providers	24%	5%	32%
Grace periods	32%	10%	35%
When to make extra charges	27%	15%	34%
None of the above	48%	75%	57%

Note: a number of respondents/childcare providers wished to provide multiple options.

Table 61 indicates that the most frequent feature/element of the 30 hours childcare offer that early years childcare providers/*settings* considered that they would (still) benefit from (more/continued) information about was: accessing or using the childcare provider portal, followed in frequency by (the dynamics of) grace periods.

The most frequent feature/element of the 30 hours childcare offer that registered childminders considered that they would (still) benefit from (more/continued) information about was: accessing or using the childcare provider portal, followed in frequency by: administration of grace periods.

Table 62 indicates the frequency with which the types of early years childcare provider considered that *their parent's* would benefit from the receipt of information about specific features/elements of the 30 hours childcare offer.

Table 62 - Frequency with which early years childcare providers/settings and registered childminders considered that their parents would benefit from the receipt of information about a specific feature of the 30 hours childcare offer

Feature/element of the 30 hours childcare offer	Percentage of responding PVI settings stating that <i>their parents</i> would continue to benefit from (more) information about...	Percentage of responding maintained nursery classes stating that <i>their parents</i> would continue to benefit from (more) information about...	Percentage of responding registered childminders stating that <i>their parents</i> would continue to benefit from (more) information about...
Understanding the eligibility criteria	54%	20%	43%
Accessing or using the government's eligibility checker	57%	23%	43%
Accessing or using the Haringey parent portal	65%	40%	43%
Reconfirming eligibility (every 3 months)	67%	55%	47%
Using more than one childcare provider/splitting the hours	41%	5%	37%
Grace periods	48%	18%	40%
Extra charges	46%	5%	40%
Other	6%	5%	2%
None of the above	24%	35%	57%

Note: respondents were able to state multiple options.

Table 62 indicates that the most frequent feature/element of the 30 hours childcare offer that early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – considered that their parents would (still) benefit from (more/continued) information about was: reconfirming eligibility (every 3 months), followed in frequency by: accessing or using the Haringey parent portal.

The most frequent feature/element of the 30 hours childcare offer that registered childminders considered that their parents would (still) benefit from (more/continued) information about was also: reconfirming eligibility (every 3 months).

2.3.5 All *responding* and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders were requested to outline what they believed (any) key challenges had been in terms of their implementation and delivery of the 30 hours childcare offer in its first year of full national roll-out, including across the London Borough of Haringey. They were also invited to describe any barriers to accessing the 30 hours childcare offer, which they believed that their parents and other local parents/families may have experienced. The most frequent statement was (words to the effect): *“The initial issuing of eligibility codes and the system of reconfirmation”*.

2.3.6 All *responding* and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders who were not (yet) offering 30 hour childcare offer places in 2019 were requested to outline under what circumstances they would consider doing so:

- 6% of applicable early years childcare providers/settings stated: If we/I had the demand from parents
- 6% of applicable early years childcare providers/settings stated: If it helped our/my business
- 6% of applicable early years childcare providers/settings stated: If we were/I was confident it would not cause us/me any sustainability concerns
- 6% of applicable early years childcare providers/settings stated: If I were confident it would not add to our paperwork and administration tasks (indeed, only registered childminders provided this response)

Additionally,

- 34% of applicable registered childminders stated: If we/I had the demand from parents
- 23% of applicable registered childminders stated: If it helped our/my business
- 20% of applicable registered childminders stated: If we were/I was confident it would not cause us/me any sustainability concerns
- 18% of applicable registered childminders stated: If I were confident it would not add to our paperwork and administration tasks

A number of additional responses were provided, most frequently (words to the effect from representatives of PVI sector early years childcare providers/settings and especially a number of applicable childminders was) *“If the funding level was paid at a higher hourly rate”*.

Finally it can be noted that “Other” *repeated* responses provided by registered childminders were (words to the effect):

“I would only provide 30 hours childcare offer places if the parent was willing to make up my fee to its normal hourly rate”.

“I would only provide 30 hours childcare places if I really needed to fill my places”.

2.3.7 Additionally all responding and applicable (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders who were not (yet) offering 30 hour childcare offer places (in 2019) were asked whether they believed that they would begin to provide 30 hours childcare places at some point in 2019.

- 0 applicable responding early years childcare providers/settings stated: Yes
- 6% of applicable responding early years childcare providers/settings stated: Maybe (and were most frequently operating in the northern vicinity of the borough)
- 81% of applicable responding early years childcare providers/settings stated: No
- 13% of applicable responding early years childcare providers/settings stated: Don't Know
- (Only) 2% of applicable responding registered childminders stated: Yes
- 13% of applicable responding registered childminders stated: Maybe (and were most frequently operating in the southern vicinity of the borough)
- 54% of applicable responding registered childminders stated: No
- 31% of applicable responding registered childminders stated: Don't Know

2.3.8 All *responding* out of school childcare providers were invited to state whether they were offering 30 hours childcare places at their setting in 2019.

Only one of responding after school clubs stated that they were offering the 30 hours childcare offer – and this setting was situated in the Northumberland Park ward.

None of the responding breakfast clubs stated that they were offering the 30 hours childcare offer and none of the responding holiday playschemes stated that they were offering the 30 hours childcare offer.

2.3.10 All *responding* out of school childcare providers were invited to state whether they had ever experienced demand for a 30 hours childcare offer place(s) or any enquiries, since its full roll-out in September 2017.

Only 2% of responding after school clubs stated that they had.

0 responding breakfast clubs and holiday playschemes stated that they had.

Additionally, all *responding* and applicable out of school childcare providers were invited to state under what circumstances would their setting consider providing 30 hours childcare offer places? Table 63 below outlines the responses aligned to the type of out of school childcare provider.

Table 63 - Circumstances under which out of school providers stated they would potentially consider organising 30 hours childcare offer place(s)

Circumstance	Out of School Childcare Provider Type		
	After School Club	Breakfast Club	Holiday Playscheme
If we had the demand from parents	13%	26%	0
If it helped our business	0	6%	0
If we were confident it would not cause sustainability concerns	3%	3%	0
If we were confident it would not add to our administration tasks	0	3%	0
Do not know enough about it to consider	23%	29%	11%
Other	61%	33%	89%

The response: if we had the demand from parents was most frequently stated by out of school childcare providers that are located in the Harringay and Noel Park wards.

The response 'Other' was most frequently (words to the effect) *"It will never be a factor because we do not take 3 – 4 year olds"*, followed in frequency by *"...If it was offered by our co-joined nursery we would consider it"*.

2.3.11 All *responding* out of school childcare providers were invited to state whether they envisaged that they might begin to provide 30 hours childcare places in autumn, spring or summer 2019 – 2020?

None of the representatives of the three types of out of school childcare settings stated: Yes – we do/will.

14% of responding breakfast clubs stated: Maybe and they were most frequently located in the Noel Park and the White Hart Lane wards.

2.3.12 In terms of the Providers Audit, all *responding* and applicable PVI settings were invited to state whether *they* were offering funded entitlement for 2 year olds places at their setting in 2019. 59% of such respondents stated that they were and 41% of such respondents stated that they were not.

Table 64 below indicates relevant responses aligned to the 19 wards.

Table 64 - Incidence of take-up and potential future provision of funded entitlement for 2 year olds places – as stated by responding early years PVI settings in 2019

Ward	Number of funded entitlement for 2 year olds <i>on roll</i> in 2019 stated by <i>responding</i> PVI settings	Number of <i>responding</i> early years childcare providers/ settings who stated that they intended to increase the number of funded 2 year old places they offer in 2019...	...Number of additional places that applicable PVI settings evidently intend to develop during the period 2019
Network Learning Community: Highgate/Muswell Hill			
Alexandra	6	0	0
Fortis Green	43	0	0
Highgate	0	0	0
Muswell Hill	22	0	0
Total NLC	71	0	0
Network Learning Community: Hornsey/Stroud Green			
Crouch End	0	0	0
Hornsey	11	0	0
Stroud Green	n/a	n/a	n/a
Total NLC	11	0	0
Network Learning Community: Wood Green			
Bounds Green	50	0	0
Noel Park	41	0	0
Woodside	38	0	0
Total NLC	129	0	0
Network Learning Community: Harringay/West Green			
Harringay	23	0	0
St. Ann's	45	0	0
West Green	44	1	4
Total NLC	112	1	4
Network Learning Community: North East Tottenham			
Northumberland Park	68	0	0
White Hart Lane	5	0	0
Total NLC	73	0	0
Network Learning Community: South East Tottenham			
Bruce Grove	23	1	3
Seven Sisters	29	0	0
Tottenham Green	21	0	0
Tottenham Hale	85	0	0
Total NLC	158	1	3

- 2.3.13 All *responding* PVI settings were invited to state whether they had a set/definite number of such places in 2019. 10% stated that they did have a set/definite number of places that they offered – and 90% stated that they did not.
- 2.3.14 All registered childminders were invited to state whether they were offering funded entitlement for 2 year olds places in 2019 as part of the Providers Audit. 55% of such respondents/individuals stated that they were and Table 65 below indicates relevant responses aligned to the 19 wards.

Table 65 - Incidence of take-up and potential future provision of funded entitlement for 2 year olds places – as stated by responding registered childminders in 2019

Ward	Number of funded entitlement for 2 year olds <i>on roll</i> in 2019 stated by <i>responding</i> registered childminders	Number of <i>responding</i> childminders who stated that they intended to increase the number of funded 2 year old places they offer in 2019...	...Number of additional places that applicable registered childminders evidently intend to develop during the period 2019
Network Learning Community: Highgate/Muswell Hill			
Alexandra	0	0	0
Fortis Green	0	0	0
Highgate	n/a	n/a	n/a
Muswell Hill	1	0	0
Total NLC	1	0	0
Network Learning Community: Hornsey/Stroud Green			
Crouch End	0	0	0
Hornsey	0	0	0
Stroud Green	0	0	0
Total NLC	0	0	0
Network Learning Community: Wood Green			
Bounds Green	0	0	0
Noel Park	0	0	0
Woodside	5	0	0
Total NLC	5	0	0
Network Learning Community: Harringay/West Green			
Harringay	0	0	0
St. Ann's	0	0	0
West Green	3	0	0
Total NLC	3	0	0
Network Learning Community: North East Tottenham			
Northumberland Park	0	0	0
White Hart Lane	0	0	0
Total NLC	0	0	0
Network Learning Community: South East Tottenham			
Bruce Grove	0	0	0
Seven Sisters	0	0	0
Tottenham Green	0	0	0
Tottenham Hale	1	0	0
Total NLC	1	0	0

Table 65 indicates that the two wards which accounted for the highest number of 2 year olds *on roll*, and occupying funded entitlement for 2 year olds places with registered childminders in 2019 were: West Green ward and Woodside ward.

- 2.3.15 All *responding* registered childminders that *provided* the funded entitlement for 2 year olds were invited to state whether they had a set/definite number of such places. 14% stated that they did have a set/definite number of places that they offered – and 86% stated that they did not.
- 2.3.16 All applicable (a) early years childcare providers/settings and (b) registered childminders were invited to state whether a particular statement about their intended forthcoming delivery of funded entitlement for 2 year old places applied to them/their provision.
- 15% of applicable early years childcare providers/settings stated:
Over the next 2 years we intend to increase the number of places that we offer to eligible 2 year olds – a response most frequently observed from applicable providers located in the Bruce Grove ward and the St. Ann’s ward
 - 36% of applicable early years childcare providers/settings stated:
Over the next 2 years the number of places that we offer to eligible 2 year olds will remain the same as it is now
 - 6% of applicable early years childcare providers/settings stated:
Over the next 2 years we intend to reduce the number of places that we offer to eligible 2 year olds
 - 43% of applicable early years childcare providers/settings stated:
I do not know what the situation will be over the next 2 years in terms of the number of places we offer to eligible 2 year olds – Additionally,
 - 10% of applicable registered childminders stated:
Over the next 2 years we intend to increase the number of places that we offer to eligible 2 year olds – a response most frequently observed from applicable providers located in the Noel Park ward
 - 46% of applicable registered childminders stated:
Over the next 2 years the number of places that we offer to eligible 2 year olds will remain the same as it is now
 - 3% of applicable registered childminders stated:
Over the next 2 years we intend to reduce the number of places that we offer to eligible 2 year olds
 - 41% of applicable registered childminders stated:
I do not know what the situation will be over the next 2 years in terms of the number of places we offer to eligible 2 year olds

2.3.17 All *responding* early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – were also invited to state whether they were offering universal 15 hours funded entitlement places for 3 and 4 year olds at their setting in 2019. 93% of such respondents stated that they were and 7% of such respondents stated that they were not. Table 66 and Table 67 below indicate relevant responses aligned to the 19 wards.

Table 66 - Incidence of take-up and potential future provision of universal 15 hours funded entitlement places for 3 and 4 year olds – as stated by responding PVI settings in 2019

Ward	Number of universal funded entitlement for 3&4 year olds <i>on roll</i> in 2019 stated by <i>responding</i> PVI settings	Number of <i>responding</i> PVI settings who stated that they intended to increase the number of universal funded entitlement for 3&4 year olds places they offer in 2019...	...Number of additional places that applicable PVI settings evidently intend to develop during the period 2019
Network Learning Community: Highgate/Muswell Hill			
Alexandra	75	0	0
Fortis Green	127	0	0
Highgate	13	0	0
Muswell Hill	118	0	0
Total NLC	333	0	0
Network Learning Community: Hornsey/Stroud Green			
Crouch End	51	0	0
Hornsey	19	0	0
Stroud Green	n/a	n/a	n/a
Total NLC	70	0	0
Network Learning Community: Wood Green			
Bounds Green	57	1	20
Noel Park	78	0	0
Woodside	44	0	0
Total NLC	179	1	20
Network Learning Community: Harringay/West Green			
Harringay	25	1	4
St. Ann's	54	0	0
West Green	66	1	4
Total NLC	145	2	8
Network Learning Community: North East Tottenham			
Northumberland Park	57	0	0
White Hart Lane	4	0	0
Total NLC	63	0	0
Network Learning Community: South East Tottenham			
Bruce Grove	25	1	3
Seven Sisters	16	0	0
Tottenham Green	37	0	0
Tottenham Hale	89	0	0
Total NLC	167	1	3

Table 67 - Incidence of take-up and potential future provision of universal 15 hours funded entitlement places for 3 and 4 year olds – as stated by responding maintained nursery classes in 2019

Ward	Number of universal funded entitlement for 3&4 year olds <i>on roll</i> in 2019 stated by <i>responding</i> maintained nursery classes	Number of <i>responding</i> maintained nursery classes that stated that they intended to increase the number of universal funded entitlement for 3&4 year olds places they offer in 2019...	...Number of additional places that applicable maintained nursery classes evidently intend to develop during the period 2019
Network Learning Community: Highgate/Muswell Hill			
Alexandra	30	0	0
Fortis Green	25	1	1
Highgate	75	1	0
Muswell Hill	n/a	n/a	n/a
Total NLC	130	2	1
Network Learning Community: Hornsey/Stroud Green			
Crouch End	25	1	5
Hornsey	114	1	4
Stroud Green	51	2	10
Total NLC	190	4	19
Network Learning Community: Wood Green			
Bounds Green	9	0	0
Noel Park	60	1	1
Woodside	30	0	0
Total NLC	99	1	1
Network Learning Community: Harringay/West Green			
Harringay	13	0	5
St. Ann's	98	5	58
West Green	88	0	0
Total NLC	199	5	63
Network Learning Community: North East Tottenham			
Northumberland Park	19	1	5
White Hart Lane	116	2	10
Total NLC	135	3	15
Network Learning Community: South East Tottenham			
Bruce Grove	9	1	10
Seven Sisters	48	2	13
Tottenham Green	31	1	5
Tottenham Hale	119	2	15
Total NLC	207	6	43

Table 66 and Table 67 indicate that the three wards which accounted for the highest number of such 3 and 4 year olds on roll, and occupying universal funded places within early years childcare sector settings in 2019 were (situated in the central vicinity and were): Fortis Green ward, Noel Park ward and Tottenham Hale ward.

- 2.3.18 All *responding* early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – that *offered* universal 15 hours funded entitlement places for 3 and 4 year olds were invited to state whether they had a set/definite number of such places in 2019. 5% stated that they did have a set/definite number of places that they offered – and 95% stated that they did not.

2.3.19 All *responding* registered childminders were invited to state whether they were offering universal 15 hours funded entitlement places for 3 and 4 year olds in 2019. 56% of such individuals stated that they were.

Table 68 below indicates relevant responses aligned to the 19 wards...

Table 68 - Incidence of take-up and potential future provision of universal 15 hours funded entitlement places for 3 and 4 year olds – as stated by responding registered childminders in 2019

Ward	Number of universal funded entitlement for 3&4 year olds <i>on roll</i> in 2019 stated by <i>responding</i> registered childminders	Number of <i>responding</i> registered childminders who stated that they intended to increase the number of funded 15 hrs entitlement for 3&4 year olds places in 2019...	...Number of additional places that applicable registered childminders evidently intend to develop during the period 2019
Network Learning Community: Highgate/Muswell Hill			
Alexandra	2	0	0
Fortis Green	5	0	0
Highgate	n/a	n/a	n/a
Muswell Hill	0	0	0
Total NLC	7	0	0
Network Learning Community: Hornsey/Stroud Green			
Crouch End	0	0	0
Hornsey	0	0	0
Stroud Green	1	0	0
Total NLC	1	0	0
Network Learning Community: Wood Green			
Bounds Green	3	0	0
Noel Park	1	0	0
Woodside	1	0	0
Total NLC	5	0	0
Network Learning Community: Harringay/West Green			
Harringay	1	0	0
St. Ann's	1	1	1
West Green	3	0	0
Total NLC	5	1	1
Network Learning Community: North East Tottenham			
Northumberland Park	2	0	0
White Hart Lane	0	1	1
Total NLC	2	1	1
Network Learning Community: South East Tottenham			
Bruce Grove	1	0	0
Seven Sisters	0	1	3
Tottenham Green	1	0	0
Tottenham Hale	2	1	2
Total NLC	4	2	5

Table 68 indicates that the three wards which accounted for the highest number of such 3 and 4 year olds on roll, and occupying such funded entitlement places with registered childminders in 2019 were:

1. Fortis Green ward

2. West Green ward
3. Bounds Green ward

2.3.20 All *responding* registered childminders that *provided* the universal 15 hours funded entitlement places for 3 and 4 year olds were invited to state whether they had a definite number of such places. 15% stated that they did have a set number of places that they offered – and 85% stated that they did not.

2.5 Supply and children with SEND

2.5.1 All responding (a) early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and (b) registered childminders were asked what they considered were the key challenges that the early years childcare sector in the London Borough of Haringey (still) faces in terms of providing suitable and quality childcare for carers/parents and their children with SEND?

The most frequent response was (words to the effect): *“Difficulties in securing funding for additional SEND support”*.

The second most frequent response was (words to the effect, especially from registered childminders): *“Physical access issues – including for wheelchair using young children”*.

The third most frequent response was (words to the effect): *“Difficulties in finding settings where a professional/a childminder is appropriately trained”*.

The fourth most frequent response was (words to the effect): *“Attaining support from the local authority”*.

The fifth most frequent response was (words to the effect): *“A challenge of securing an early diagnosis”*.

2.5.2 All responding out of school childcare providers were asked what they considered were the key challenges that the out of school childcare sector in the London Borough of Haringey (still) faces in terms of providing suitable and quality childcare for carers/parents and their children with SEND?

The most frequent response was (words to the effect): *“Difficulties in securing funding for additional SEND support”*.

The second most frequent response was (words to the effect): *“Our staff training could ideally be enhanced”*.

The third most frequent response was (words to the effect): *“A need to ideally resource more 1-1 support”*.

The fourth most frequent response was (words to the effect): *“Attaining funding for more specialist equipment”*.

The fifth most frequent response was (words to the effect): *“A challenge of making carers actually aware that we can support SEN children”*.

2.6 Perceptions on future sustainability

2.6.1 All responding early years childcare providers/settings – i.e. PVI settings and maintained nursery classes – and registered childminders were requested to state/quantify how long they *expected* to (continue to) be providing childcare?

Diagram 31 - Length of time that early years childcare providers/settings and registered childminders anticipated their sustainability and operation would continue

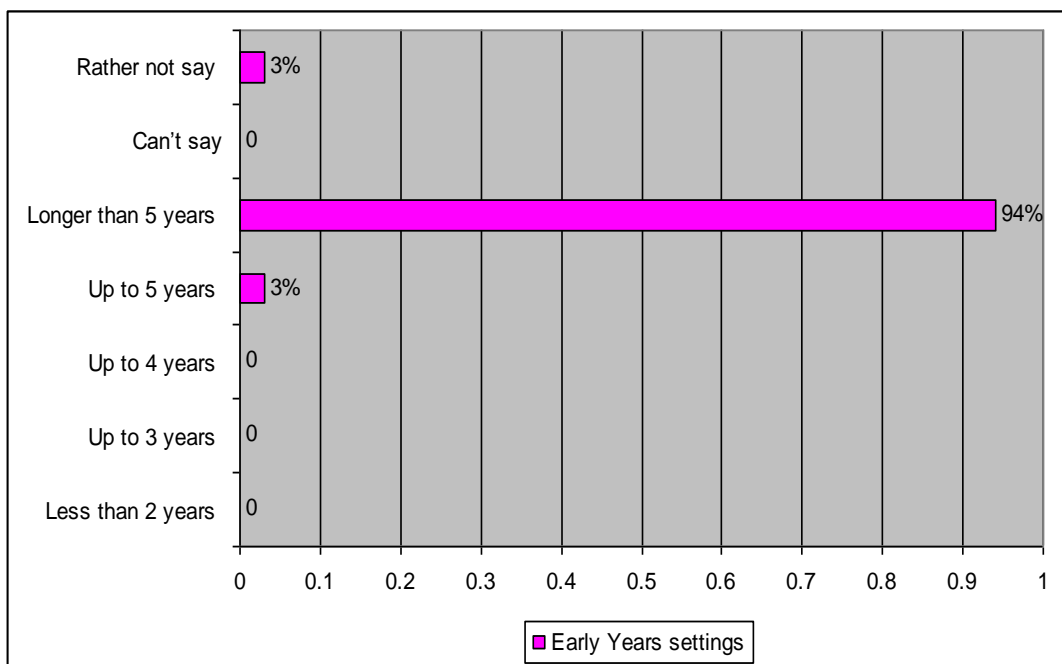
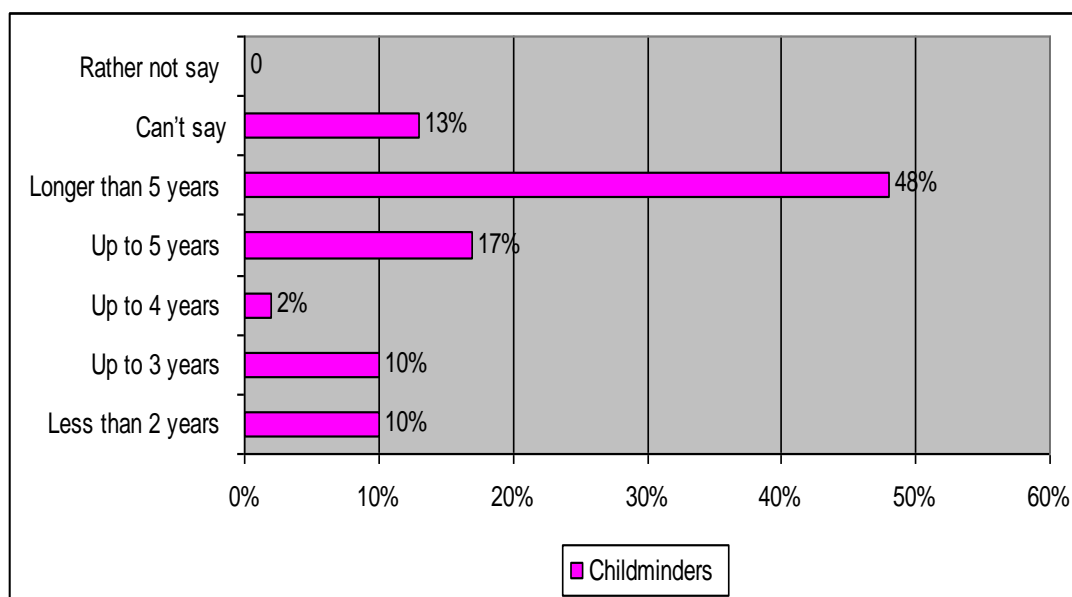


Diagram 32 - Length of time that early years childcare providers/settings and registered childminders anticipated their sustainability and operation would continue



2.6.2 Diagrams 31 and 32 indicates that the:

- London Borough of Haringey’s PVI early years childcare settings and maintained nursery classes most frequently expected to be sustainable and operating for longer than 5 years
- London Borough of Haringey’s registered childminders also most frequently also expected to be sustainable and operating for longer than 5 years – however 1 : 5 stated that they did not expect to be operating past late 2021 – and these childminders were most frequently operating in the western vicinity of the borough

2.6.3 All responding out of school childcare providers were requested to state/quantify how long they *expected* to (continue to) be providing childcare?

Table 69 - Length of time that out of school childcare providers anticipated their sustainability and operation would continue

Length of time	After School Clubs	Breakfast Clubs	Holiday Playschemes
Less than 2 years	0	0	0
Up to 3 years	0	0	0
Up to 4 years	0	0	0
Up to 5 years	0	0	0
Longer than 5 years	93%	97%	100%
Can't say	7%	3%	0

2.6.4 Table 69 indicates that all of the out of school childcare settings had a very positive outlook aligned to ongoing sustainability.

2.7 Perceptions on beneficial forms of support

2.7.1 Table 70 indicates the extent to which early years childcare providers – i.e. PVI settings and maintained nursery classes – and registered childminders stated that they felt their provision would benefit from specific types of support – potentially via the local authority Table 70 - Extent to which early years childcare providers and registered childminders stated that they felt their provision would benefit from specific/targeted types of support

Type of Support	Early Years Childcare Settings	Registered Childminders
Recruitment and Retention	29%	6%
Training	18%	14%
Marketing support/advice	21%	16%
(Continued ¹⁴)Business support/advice	21%	17%
Building alterations	13%	8%
Inspection/registration support/advice	6%	10%
Support to network with other providers/childminders	9%	10%
Support with setting up an After school club	4%	7%
Support with setting up a Breakfast club	4%	8%
Support with setting up a Holiday playscheme	4%	6%
Advice/support on needs of Children with special needs	19%	20%
Advice/support on providing childcare for complex medical needs	17%	21%

2.7.2 Table 70 indicates that the three most frequent forms of specific/targeted support requested by (responding) members of the London Borough of Haringey's early years childcare providers/settings were (in order of frequency):

1. Recruitment and retention
2. Marketing advice/support
3. (Continued) business support/advice

The three most frequent forms of specific/targeted support requested by (responding) members of the London Borough of Haringey's childminding sector were (in order of frequency):

1. Advice/support on providing childcare for complex medical needs
2. Advice/support on needs of children with special needs

¹⁴ To complement the research outlined in this report, the London Borough of Haringey commissioned a period of business modeling and sustainable support which (also) was undertaken in late 2018 – early 2019. That project was also undertaken by Premier Advisory Group and led by the organisation's Associate Director for Early Years Business Support.

3. (Continued) business support/advice

2.7.3 Table 80 indicates the extent to which out of school childcare providers stated that they felt their provision would benefit from specific types of support – potentially via the local authority

Table 80 - Extent to which out of school childcare providers stated that they felt their provision would benefit from specific/targeted types of support

Type of Support	After School Clubs	Breakfast Clubs	Holiday Playschemes
Recruitment and Retention	3%	3%	0
Training	43%	11%	56%
Marketing support/advice	20%	14%	22%
Business support/advice	28%	17%	33%
Building alterations	18%	11%	11%
Inspection/registration support/advice	18%	6%	33%
Support to network with other providers	23%	9%	33%
Support with setting up a Breakfast club	5%	3%	0
Support with setting up a Holiday playscheme	8%	0	0
Advice/support on needs of Children with special needs	33%	3%	44%
Advice/support on providing childcare for complex medical needs	28%	3%	33%

2.7.4 Table 80 indicates that the three most frequent forms of specific/targeted support requested by (responding) members of the London Borough of Haringey's out of school childcare providers/settings were (in order of frequency):

1. Staff training
2. Business support/advice
3. Advice/support on needs of children with special needs

4 30 hours childcare-themed – Gaps Analysis

The following narrative presents some potential priorities which sufficiency planners within the London Borough of Haringey could consider during the third full year of roll out of the 30 hours childcare offer, including aligned to an over-riding ambition for the borough to enhance social mobility.

The 30 hours childcare offer has evidently had an impact on the London Borough of Haringey's early years childcare market since its inception in September 2017, particularly in terms of an increase in the take-up of 3 year olds and providers filling their vacant places. Effectively, the early years childcare market has (re)balanced between funded childcare offers – and will continue to do so during the period 2019 – 2021.

The affect on social mobility been positive however, with more families benefitting from funded childcare provision. However, it is arguable that more work is needed to ensure that families take up the entitlements, especially in areas where there are high populations of children and low take up.

The 2019 Childcare Sufficiency Assessment has demonstrated how social mobility is being enhanced in the borough as an outcome of positive attributes of its early years and childcare market/sector. For example, through consulting with parents it became clear that:

- The parents of 3 and 4 year olds *who were* accessing the 30 hours childcare offer, were invited to state whether they considered that the 30 hours childcare offer was helping them and/or a partner to remain in work or to take up employment – and:
 - 79% of applicable parents stated: Yes, it has helped me and/or a partner to remain in employment/self-employment/a job
 - 5% of applicable parents stated: Yes, it has helped me and/or a partner to take up a part-time job/part-time self-employment.
 - 5% of applicable parents stated: Yes, it has helped me and/or a partner to take up a full-time job/full-time self-employment.
 - 11% of the applicable parents stated that their (working) circumstance(s) had not been in anyway affected by the childcare offer
- The most frequent reason stated for using formal childcare was: so that I can go to work or study (69% of applicable parents)
- Indeed approximately 1 : 2 of the responding parents stated that they were *currently* in a type of paid employment – i.e. they were working parents – and that in the majority of cases this was made possible by them using formal childcare, including in a large number of cases one of the three funded entitlement
- Over half of formal childcare using parents had never experienced in any barriers to do doing so

Finally, from a contextual perspective, it should also be noted that a number of the Gaps presented below are geographical themed potential *forthcoming* priorities, which have been informed by the outcomes of the 2019 Childcare Sufficiency Assessment.

Potential Emerging Gap 1: The Seven Sisters ward accounts for a relatively high number of resident 2, 3 and 4 year olds, plus a relatively high ongoing birth rate.

As part of the overall Tottenham Regeneration initiatives the High Road West project will continue to generate the establishment of (c1,200) new dwellings in forthcoming years in the Seven Sisters ward.

Potential Action: Childcare sufficiency planners within the London Borough of Haringey should prioritise monitoring the ongoing availability of 30 hours childcare offer places in the Seven Sisters ward – and potentially instigate action(s) to further stimulate the delivery of funded early years provision within that wider South West Network Learning Community, including the wards of Bounds Green, Tottenham Hale and Tottenham Green wards (where the population of young children is increasing), aligned to the ongoing incidence of (any) vacant places.

Potential Emerging Gap 2: Two wards which evidently account for a relatively low number of ‘30 hours childcare children’ *on roll* in 2019 are (the relatively deprived, including in terms of historically high unemployment levels, like the Seven Sisters ward above) Northumberland Park ward. However both wards account for a relatively high number of resident 3 – 4 year olds, plus 2 year olds.

Potential Action: Childcare sufficiency planners within the London Borough of Haringey should prioritise monitoring the actual availability of 30 hours childcare offer places in both wards – and potentially instigate action(s) to (further) stimulate the delivery of such funded provision within the two localities, if demand becomes more pronounced.

Indeed an important intervention of childcare sufficiency planners will be to (continue to) stabilize the childcare market within such relatively deprived wards, including in light of the reduction of the hourly funding rate of the free entitlement for 2 year olds, which is set to be implemented across the borough in September 2019. Part of this stabilization will be achieved through the provision, by the London Borough of Haringey, of structured business support to early years childcare settings to highlight areas of risk in provider viability and sufficiency of childcare places.

Potential Emerging Gap 3: The population of 2, 3 and 4 year olds continues to be relatively high in the Tottenham Green ward and the Tottenham Hale ward. This is an area which is set to account for a pronounced incidence of new housing developments, and thus it can be reasonably assumed a growing population of resident 2 – 4 year olds – including via the Mayor’s Housing Zone initiative/the Hale Village site.

Potential Action: Those responsible for childcare sufficiency planning within the borough need to retain an awareness that pressure for future funded early years childcare will – with a high probability – be focused on the eastern/Tottenham vicinity. Ongoing structured business modeling support, offered to/accessible to the vicinity’s early years childcare sector would continue to encourage/enable more 30 hours childcare places, including through such further support offered to that locality’s childminders.

Those responsible for childcare sufficiency planning within the borough should consider working with those LA colleagues who have an involvement in the Hale Village development and its (new dwellings) phasing.

Potential Emerging Gap 4: A relatively high number of new dwellings are set to be constructed and eventually occupied in the Northumberland Park ward, situated in the north east of the borough. This ward also (already) accounts for a relatively high number of resident 2, 3 and 4 year olds, high levels of deprivation and unemployment, and a relatively low number of PVI sector early years childcare providers/settings.

Potential Action: (As with emerging Gap 1) childcare sufficiency planners within the London Borough of Haringey should prioritise monitoring the actual availability of the free entitlement for 2 year olds places in the (relatively deprived) Northumberland Park ward – and potentially instigate action(s) to (further) stimulate the delivery of early years childcare provision within that locality. These actions could include focused early years and childcare development work – through start-up stimulation – in the Northumberland Park ward, including in partnership with the local (voices of and advocates of the) community.

Potential Emerging Gap 5: All responding (to the Providers Audit) providers/settings and registered childminders who were evidently not yet offering 30 hour childcare offer places in 2019 were asked whether they envisaged that they would begin to provide 30 hours childcare places at some point in 2019. 0 early years childcare providers/settings stated that they did and only 2% of registered childminders stated that they did. However, 6% of early years childcare providers/settings stated: Maybe – as did 13% of registered childminders.

Potential Action: Childcare sufficiency planners within the London Borough of Haringey could focus on converting those Maybes into more tangible intentions - particularly in areas of high deprivation, such as the Northumberland Park ward, including in order to help meet increasing demand for 30 hours childcare offer places throughout the borough.

Potential Emerging Gap 6: The 2018 Haringey School Places Planning Report stated that the number of children and young people with a statement that were resident in the borough is on *an overall upward trajectory*. However, there was 0 examples of responding childminders – via the 2019 Providers Audit – stating that, in 2019, they had a 2 – 4 year old *with SEND* who was occupying a funded place. More encouragingly, two-thirds of responding early years childcare providers/settings stated that at least one child with SEND was occupying a funded childcare place at their setting.

Potential Action: Childcare sufficiency planners and SEND professionals/officers within the London Borough of Haringey, as part of a drive to further promote the ability of local childminders to provide funded childcare places, could work in partnership to ensure that a certain number are also equipped to effectively care for such 2 – 4 year olds with SEND, with a particular focus on the relatively deprived wards of the borough, such as Northumberland Park, Seven Sisters, Tottenham Hale and Tottenham Green.

Potential Emerging Gap 7: A number of registered childminders have expressed their concerns that parents are not as aware *as ideally they could be* that they can also viably deliver the 30 hours childcare offer. The childminders who attended a focus group session in early 2019 and which was targeted at their profession concurred that the local authority and its services could best help by promoting a message to local young parents that the 30 hours childcare offer can be accessed via registered childminders as well as the local daycare sector. It was also observed how certain childminders acknowledged that (in the words of one of their number) “...we are not as proactive in marketing as nurseries are”.

Potential Action: Childcare sufficiency and business planners within the London Borough of Haringey should prioritise their ongoing (strategic) work to raise and maintain the profile of the local childminding sector as a source of funded childcare support.

Potential Emerging Gap 8: A number of responding early years childcare providers/settings considered a priority for the London Borough of Haringey to be offering more support which would help them to address the challenge of (concisely and accurately) describing eligibility and the processes involved with accessing the entitlements offer to their growing numbers of EAL parents and families.

Potential Action: The London Borough of Haringey should continue its dedicated outreach work which supports EAL families, including via the role that its Children's Centres have to support BME and EAL communities.

Potential Emerging Gap 9: As part of the Providers Audit all (a) early years childcare providers/settings and (b) registered childminders were asked: *How would a reduction in the 2 year old free entitlement affect your ability to provide such provision?*

79% of applicable PVI settings stated: we might have to reduce the number of places we offer – and were most frequently located in the Highgate/Muswell Hill Network Learning Community. 100% of applicable maintained nursery classes/nursery schools stated: we might have to reduce the number of places we offer.

61% of applicable registered childminders stated: we might have to reduce the number of places we offer – and were most frequently located in the southern vicinity of the borough.

Potential Action: The London Borough of Haringey should continue to monitor the ongoing number of eligible 2 year olds in wards such as the relatively densely populated Seven Sisters ward in order to evaluate the extent to which any changes to the hourly funding rate for the free entitlement for 2 year olds may affect the availability of such (funded) support/provision.

Potential Emerging Gap 10: As an outcome of the Providers Audit, 6% of applicable early years childcare providers/settings stated that over the next 2 years they intend to reduce the number of funded places that they offer to eligible 2 year olds – and 3% of applicable registered childminders stated likewise

Potential Action: The London Borough of Haringey should work in partnership with those early years childcare providers who – as an outcome of the 2019 Providers Audit – stated that they intended to *increase* the number of free entitlement for 2 year olds places during 2019 – 2021, in order to offset potential reductions by other applicable providers.

Potential Emerging Gap 11: Approximately 1 : 5 of all responding early years childcare providers/settings *did not anecdotally feel* that there were sufficient childcare places *in their immediate geographical area* for children aged *under 2 years* – a response which was most frequently given by such providers that were situated within the western locality of the borough. Additionally a trend which a number of responding early years childcare providers/settings fed back was that they had been in receipt of more “*enquiries*” for places for babies in recent years.

Potential Action: Those responsible for childcare sufficiency planning within the London Borough of Haringey should continue to monitor demand for childcare places for under 2 year olds and where/when evidently required work in partnership with local early years childcare

providers to encourage/incentivize the establishment of further such places, including aligned to the fact that parents of 2 year olds that are eligible for the entitlement continue to view it as a valued form of support.

Potential Emerging Gap 12: An outcome of focus group sessions with early years childcare providers/settings in 2019 was a belief that Haringey-based employers were not invested in, or aware of, the 30 hours childcare offer as ideally they could be.

Potential Action: Childcare sufficiency and business planners within the London Borough of Haringey could prioritise further promoting and raising the profile of the 30 hours with local employers including via their HR representatives.

Potential Emerging Gap 13: London Borough of Haringey early years childcare providers/settings most frequently expected demand to be Higher – But not Significantly in 2020 – 2021. One-third of the early years childcare providers/settings that stated an answer of *Significantly Higher*, by that time, were located in the Tottenham Hale ward

Potential Action: Childcare sufficiency planners within the London Borough of Haringey could consider this finding aligned to Gap 3, which proposed that those responsible for childcare sufficiency planning within the borough need to retain an awareness that pressure for future funded early years childcare will – with a high probability – be focused on the Tottenham Hale and Tottenham Green wards linked to building developments.

Potential Emerging Gap 14: The London Borough of Haringey out of school childcare providers/settings most frequently expect demand to be higher in 2021. The Tottenham Hale, Tottenham Green, Seven Sisters and Bounds Green wards accounted for the highest frequency of the response(s): Significantly Higher or Higher – but Not Significantly. The same wards also account for the highest resident population for 5 – 14 year olds, at levels that are indeed rising.

Additionally, parents were invited to state whether they intended to use any formal childcare in the next two years, which they were not, in 2019, currently accessing. In terms of out of school childcare, an after school club was stated by 1 : 4 of applicable parents who were most frequently resident in the Tottenham Hale, Tottenham Green, Seven Sisters and Bounds Green wards.

Potential Action: Childcare sufficiency planners need to retain an awareness that pressure for future out of school childcare will – with a high probability – be focused on the Tottenham Hale, Tottenham Green, Seven Sisters and Bounds Green wards and may need to again respond by initiating approaches to stimulate the market, including the establishment of new provisions, especially for the school holiday periods.

Potential Emerging Gap 15: The 2018 Haringey School Places Planning Report outlined how the number of children and young people with SEND that were resident in the borough is on *an overall upward trajectory*. Additionally, the Haringey Needs Assessment for children with SEND has concluded that the highest prevalence rates in terms of all children and young people with SEND were observed in the Seven Sisters ward in the eastern vicinity of the borough.

Potential Action: Though early years and childcare providers fed back their willingness and ability to provide provision for children with SEND, the increase in numbers needs to be factored in to planning by the London Borough of Haringey, including in terms of the

(a) accessibility to funded childcare places; (b) the relevant training need(s) of early years and childcare professionals; (c) the further promotion of the existence of the Disability Access Fund.

Appendices

Appendix 1 - Fundamental supply and quality of childcare in early 2019 aligned to (a) ward and (b) Network Learning Community

The Tables below present three key indicators – by type of childcare provider – firstly aligned to the six Network Learning Community and then the 19 wards:

1. Number of childcare providers by ward
2. Total Number of places in the ward
3. Percentage of childcare providers with a Good or Outstanding Ofsted

Table 81 - Supply and quality in early 2019 observed in the Alexandra ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	2	112	100%
Maintained Nursery Class	2	104	100%
Pre-School Playgroup	3	58	100%
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	9	50	88% 1 = No Ofsted yet
After School Club	1	30	1 = No Ofsted yet
Before/ Breakfast Club	0	0	n/a
Holiday Playscheme	0	0	n/a

Table 82 - Supply and quality in early 2019 observed in the Fortis Green ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	5	265	80% 1 = No Ofsted yet
Maintained Nursery Class	3	119	100%
Pre-School Playgroup	4	104	100%
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	8	73	88% 1 = No Ofsted yet
After School Club	5	207	40% 1 = No Ofsted yet
Before/ Breakfast Club	2	75	100%
Holiday Playscheme	2	50	50% 1 = No Ofsted yet

Table 83 - Supply and quality in early 2019 observed in the Highgate ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	2	86	100%
Maintained Nursery Class	2	78	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	1	6	100%
After School Club	2	44	2 = No Ofsted yet
Before/ Breakfast Club	2	70	100%
Holiday Playscheme	0	0	n/a

Table 84 - Supply and quality in early 2019 observed in the Muswell Hill ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	8	281	87.5%
Maintained Nursery Class	0	0	n/a
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	5	45	80% 1 = No Ofsted yet
After School Club	1	25	1 = No Ofsted yet
Before/ Breakfast Club	1	30	100%
Holiday Playscheme	0	0	n/a

Table 85 - Supply and quality in early 2019 observed in the Crouch End ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	6	377	100%
Maintained Nursery Class	1	64	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	9	55	88% 1 = No Ofsted yet
After School Club	3	69	66% 1 = No Ofsted yet
Before/ Breakfast Club	2	52	100%
Holiday Playscheme	1	15	1 = No Ofsted yet

Table 86 - Supply and quality in early 2019 observed in the Hornsey ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	2	76	100%
Maintained Nursery Class	3	141	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	8	44	62.5%
After School Club	3	130	100%
Before/ Breakfast Club	2	75	100%
Holiday Playscheme	1	50	1 = No Ofsted yet

Table 87 - Supply and quality in early 2019 observed in the Stroud Green ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	1	25	100%
Maintained Nursery Class	3	203	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	7	41	88% 1 = No Ofsted yet
After School Club	n/a	n/a	n/a
Before/ Breakfast Club	n/a	n/a	n/a
Holiday Playscheme	n/a	n/a	n/a

Table 88 - Supply and quality in early 2019 observed in the Bounds Green ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	5	198	100%
Maintained Nursery Class	2	91	100%
Pre-School Playgroup	1	18	100%
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	7	53	75%
After School Club	1	28	100%
Before/ Breakfast Club	1	28	100%
Holiday Playscheme	0	0	n/a

Table 89 - Supply and quality in early 2019 observed in the Noel Park ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	6	318	100%
Maintained Nursery Class	1	62	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	12	71	92%
After School Club	3	137	33% 2 = No Ofsted yet
Before/ Breakfast Club	1	37	100%
Holiday Playscheme	0	0	n/a

Table 90 - Supply and quality in early 2019 observed in the Woodside ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	3	160	66% 1 = No Ofsted yet
Maintained Nursery Class	4	248	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	1	73	Satisfactory
Registered Childminder	8	49	87% 1 = No Ofsted yet
After School Club	1	35	100%
Before/ Breakfast Club	2	105	100%
Holiday Playscheme	0	0	n/a

Table 91 - Supply and quality in early 2019 observed in the Harringay ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	5	209	100%
Maintained Nursery Class	2	100	100%
Pre-School Playgroup	1	20	100%
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	14	84	93%
After School Club	2	50	50% 1 = No Ofsted yet
Before/ Breakfast Club	2	75	100%
Holiday Playscheme	0	0	0

Table 92 - Supply and quality in early 2019 observed in the St. Ann's ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	2	54	50% 1 = No Ofsted yet
Maintained Nursery Class	6	330	100%
Pre-School Playgroup	1	28	100%
Maintained Nursery School	1	135	100%
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	8	57	89%
After School Club	2	163	50% 1 = No Ofsted yet
Before/ Breakfast Club	3	67	100%
Holiday Playscheme	0	0	0

Table 93 - Supply and quality in early 2019 observed in the West Green ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	4	172	75% 1 = No Ofsted yet
Maintained Nursery Class	3	184	100%
Pre-School Playgroup	1	24	0 1 = No Ofsted yet
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	1	100	100%
Registered Childminder	14	81	75% 1 = No Ofsted yet
After School Club	1	40	50% 1 = No Ofsted yet
Before/ Breakfast Club	3	204	100%
Holiday Playscheme	0	0	0

Table 94 - Supply and quality in early 2019 observed in the Northumberland Park ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	1	35	100%
Maintained Nursery Class	5	332	100%
Pre-School Playgroup	1	30	100%
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	1	60	100%
Registered Childminder	7	47	100%
After School Club	6	142	66% 1 = No Ofsted yet
Before/ Breakfast Club	3	75	66% 1 = No Ofsted yet
Holiday Playscheme	2	115	0 1 = No Ofsted yet

Table 95 - Supply and quality in early 2019 observed in the White Hart Lane ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	3	131	33% 1 = No Ofsted yet
Maintained Nursery Class	2	125	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	1	142	100%
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	13	67	100%
After School Club	3	104	33% 2 = No Ofsted yet
Before/ Breakfast Club	2	114	100%
Holiday Playscheme	0	0	0

Table 96 - Supply and quality in early 2019 observed in the Bruce Grove ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	2	96	100%
Maintained Nursery Class	1	52	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	11	68	64% 3 = No Ofsted yet
After School Club	2	60	100%
Before/ Breakfast Club	1	30	100%
Holiday Playscheme	0	0	0

Table 97 - Supply and quality in early 2019 observed in the Seven Sisters ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	0	0	n/a
Maintained Nursery Class	4	195	75%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Triangle Children, Young People and Community Centre	1	147	100%
Registered Childminder	9	149	75% 1 = No Ofsted yet
After School Club	5	135	66% 2 = No Ofsted yet
Before/ Breakfast Club	3	101	66%
Holiday Playscheme	1	15	100%

Table 98 - Supply and quality in early 2019 observed in the Tottenham Green ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	2	95	50%
Maintained Nursery Class	2	256	100%
Pre-School Playgroup	1	17	100%
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	10	59	75% 2 = No Ofsted yet
After School Club	2	66	100%
Before/ Breakfast Club	2	80	100%
Holiday Playscheme	1	36	1 = No Ofsted yet

Table 99 - Supply and quality in early 2019 observed in the Tottenham Hale ward

Type of Provider	Number of providers in Ward	Total number of places in Ward	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	3	156	33% 2 = No Ofsted yet
Maintained Nursery Class	3	156	100%
Pre-School Playgroup	1	28	100%
Maintained Nursery School	1	184	100%
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	13	73	53% 2 = No Ofsted yet
After School Club	1	22	0
Before/ Breakfast Club	4	154	100%
Holiday Playscheme	1	30	100%

Table 100 - Supply and quality in early 2019 observed in the Highgate/Muswell Hill Network Learning Community

Type of Provider	Number of providers in NLC	Total number of places in NLC	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	16	689	82% 1 = No Ofsted yet
Maintained Nursery Class	7	301	100%
Pre-School Playgroup	7	162	100%
Maintained Nursery School	0	0	n/a
Children's Centre (LA) Day Nursery	1	55	n/a
Registered Childminder	26	198	73% 1 = No Ofsted yet
After School Club	8	276	30% 6 = No Ofsted yet
Before/ Breakfast Club	5	175	100%
Holiday Playscheme	2	49	50% 1 = No Ofsted yet

Table 101 - Supply and quality in early 2019 observed in the Hornsey/Stroud Green Network Learning Community

Type of Provider	Number of providers in NLC	Total number of places in NLC	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	9	478	100%
Maintained Nursery Class	7	408	100%
Pre-School Playgroup	0	0	n/a
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	0	0	n/a
Registered Childminder	24	140	75%
After School Club	6	199	83% 1 = No Ofsted yet
Before/ Breakfast Club	4	127	100%
Holiday Playscheme	2	65	2 = No Ofsted yet

Table 102 - Supply and quality in early 2019 observed in the Wood Green Network Learning Community

Type of Provider	Number of providers in NLC	Total number of places in NLC	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	11	516	100%
Maintained Nursery Class	7	401	100%
Pre-School Playgroup	1	18	100%
Maintained Nursery School	0	0	n/a
Children's Centre Day Nursery	1	73	0
Registered Childminder	16	102	73% 1 = No Ofsted yet
After School Club	5	200	60% 2 = No Ofsted yet
Before/ Breakfast Club	4	170	100%
Holiday Playscheme	n/a	n/a	n/a

Table 103 - Supply and quality in early 2019 observed in the North East Tottenham Network Learning Community

Type of Provider	Number of providers in NLC	Total number of places in NLC	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	4	166	50% 1 = No Ofsted yet
Maintained Nursery Class	7	447	100%
Pre-School Playgroup	1	30	100%
Maintained Nursery School	1	142	100%
Children's Centre Day Nursery	1	60	100%
Registered Childminder	20	114	95% 1 = No Ofsted yet
After School Club	8	246	55% 4 = No Ofsted yet
Before/ Breakfast Club	5	189	80% 1 = No Ofsted yet
Holiday Playscheme	2	115	50% 1 = No Ofsted yet

Table 104 - Supply and quality in early 2019 observed in the South East Tottenham Network Learning Community

Type of Provider	Number of providers in NLC	Total number of places in NLC	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	10	507	60% 2 = No Ofsted yet
Maintained Nursery Class	7	502	86%
Pre-School Playgroup	2	45	100%
Maintained Nursery School	1	184	100%
Triangle Children, Young People and Community Centre	1	147	100%
Registered Childminder	53	320	68% 6 = No Ofsted yet
After School Club	8	223	75% 2 = No Ofsted yet
Before/ Breakfast Club	9	335	100%
Holiday Playscheme	3	80	66% 2 = No Ofsted yet

Table 105 - Supply and quality in early 2019 observed in the Harringay/West Green Network Learning Community

Type of Provider	Number of providers in NLC	Total number of places in NLC	% with Met, Good or Outstanding Ofsted
PVI Day Nursery	11	435	81% 2 = No Ofsted yet
Maintained Nursery Class	11	614	100%
Pre-School Playgroup	3	72	66% 1 = No Ofsted yet
Maintained Nursery School	1	135	100%
Children's Centre Day Nursery	1	100	100%
Registered Childminder	38	222	84% 1 = No Ofsted yet
After School Club	5	253	40% 3 = No Ofsted yet
Before/ Breakfast Club	8	346	100%
Holiday Playscheme	n/a	n/a	n/a

Appendix 2 - Outcomes of Focus Groups with Early Years Childcare Providers and Childminders Survey

During January 2019 a series of three focus group sessions were facilitated with early years childcare providers that operate within the London Borough of Haringey. All representatives of PVI early years childcare settings and maintained nursery classes, and registered childminders received an invitation to attend a focus group session and the logistics and attendance was observed as follows:

Session 1 aimed at early years childcare providers/settings that are located in the West of the Borough was held as follows:

Tuesday, 15th January 2019

1.30pm to 3.30pm

Hornsey School for Girls

and was attended by 20 representatives of such settings.

Session 2 aimed at early years childcare providers/settings that are located in the East of the Borough was held as follows:

Wednesday, 16th January 2019

1.30pm to 3.30pm

Seven Sisters Primary School

and was attended by 10 representatives of such settings.

Session 3 aimed at registered childminders operating throughout the Borough was held as follows:

Thursday, 17th January 2019

7.00pm to 9.00pm

Haringey Civic Centre

and was attended by 7 registered childminders.

The key objective of each focus groups were to further explore key feedback and themes that had been observed and outlined during the telephone interview phase.

A.1 Emerging strengths of the 30 hours childcare offer

A.1.1 A number of attendees at all three sessions agreed that the administrative issues associated with the introduction of the 30 hours childcare offer had progressively resolved and that the period since September 2018 had seemed more embedded and “settled”. One particular feature of the 30 hours ‘system’ which a number of representatives of early years childcare settings repeatedly agreed had improved was “timings for the uploading of and submission of headcount data”.

A.1.2 A number of childminders welcomed the advent of the offer and how it can support families that are experiencing disadvantage. However a number of such childminders also cautioned that the word ‘free’ (in their opinion) had “confused” certain parents, especially “when it comes to paying for extras and meals”. Additionally in terms of the (evidently still thorny issue of) *meals* the representatives of settings who attended the focus group at Hornsey School for Girls suggested that more clarity would benefit certain parents on the specific issue of lunch times and the need settings to still charge for this meal. Additionally a representative of an early years childcare setting that attended the focus group at Seven Sisters Primary School described how they had also experienced challenges with parents agreeing to additional charges aligned to the 30 hours childcare offer. For example, one attendee described how:

“We introduced a fee for lunch and asked parents to also send their children in with a fruit snack. It played out that parents paid the additional cost, reluctantly, but did not pack a fruit snack”.

Indeed, when concluding a conversation on this subject one other attendee made a suggestion which a number of co-participants advocated too – i.e.:

“Using supporting research or data to reinforce the need for such additional charges could help us... as the 30 hours ‘free’ statement is [in my opinion] misleading”

A.2 Perceived shortfalls of the evolving 30 hours childcare offer

A.2.1 Although – as is outlined in 3.1.1 above – representatives of early years childcare settings who attended both focus group sessions believed that the implementation of the 30 hours childcare offer had progressively improved, there was still a belief that the programme was creating additional administrative (and time consuming) issues. Two repetitive words used in terms of their time were “chase” and “remind” particularly with regard to parent’s reconfirming their eligibility. It was evident however that certain providers were strategic in terms of this effort, including through:

- Reminder letters (from the provider)
- Telephone calls and (their own) text messaging to parents

- Having parents/carers reconfirm eligibility, on-line, at the setting
- Identifying parents who may require concerted support in terms of navigating the offer

An attendee at one of the focus group sessions attended by representatives of early years childcare settings outlined:

“It would be good if HMRC could notify the childcare provider when a reconfirmation code request has been sent to parents/carers to ensure they are meeting deadlines”.

A.2.2 ...Childminders who attended their targeted focus group session agreed that there was a lack of understanding among certain parents of under 5 year olds about how they could access the 30 hours childcare offer and the eligibility criteria and system.

A number of registered childminders also believed that the re-confirmation process had not proved to be a smooth process for (again certain) parents and that such parents tended to (over) rely on the childminder themselves to advise them and help them to navigate this process. For example one attending childminder stated:

“Parents come to us for help with re-confirmation... some still don’t know what they need to do...”.

A.3 Priorities for potential change

A.3.1 A number of representatives of maintained nursery classes believed that their counterparts in the PVI sector had adapted to the 30 hours childcare offer and its administrative requirements at a more wholesale speed due to the logistics around how they were able to meet parent’s wishes. For example feedback from representatives of maintained nursery classes included:

“Our opening hours are by their nature more restrictive”.

However, certain representatives of PVI settings believed that their colleagues in the maintained sector were in the advantageous position, in terms of their ability to adapt to parental demand – for example:

“Some ‘schools’ make it difficult for us [PVI settings] to compete as they offer free breakfast clubs”.

A.3.2 As is outlined in 3.5.1 below a number of childminders believed that parents did not readily associate the 30 hours childcare offer with their profession.

Essentially a number also believed that more childminders would be persuaded to provide 30 hours childcare offer places if the hourly funding rate was increased, thus making it a more attractive enterprise for them. Indeed, one childminder stated *“30 hours is simply not for me... it is too much work not enough reward”.*

Another childminder stated (and again quoted the actual amount of hours) *“30 hours a week is not good for us as we work all year round”.*

Additionally, on the theme of viability one childminder contributed *“30 hours isn’t enough – if a family only wants 30 hours per week a lot of us childminders don’t feel we can deliver it... as financially it is not good for us”*.

However, it should be concluded that on this theme, certain childminders were (more) supportive of the advent of the 30 hours childcare offer and perceived it to be an opportunity that other childminders could be more proactive in responding to and using to their *“business advantage”*.

A.4 Role of the London Borough of Haringey

- A.4.1 A number of representatives of early years childcare settings suggested that there could be more awareness about the fact that certain parents were not as IT intuitive or savvy as others. For example, feedback on this issue included:

“Parents are not always clear on what is on offer and some find it hard to access the on-line information”.

“IT can act as a barrier for some parents preventing them from starting the process of eligibility”.

However, there was *repeated praise* of the role that the London Borough of Haringey had played in terms of concisely promoting the 30 hours childcare offer – including in terms of its *“affect on other benefits”* – and in supporting the early years childcare sector. One attendee at the focus group for early years childcare providers situated in the east of the borough made a statement which other co-participants agreed with: *“Haringey Council publicises the 30 hours childcare offer and they are really helpful in terms of explaining to us how we can promote it too... and with sending us marketing ideas”*.

A number of representatives of early years childcare settings did suggest that a priority for the local authority could be examining how it could undertake further work to promote and publicise the 30 hours childcare offer to Haringey-based employers and *with* such employers.

- A.4.2 The participating childminders concurred that the local authority and its services could best help by promoting a message to local young parents that the 30 hours childcare offer can be accessed via registered childminders as well as the local daycare sector.

A.5 Parents and the 30 hours childcare offer

- A.5.1 A number of childminders agreed with a perception that local parents did not hold them in the same esteem as a potential source of 30 hours childcare support as they did local daycare settings. For example, applicable feedback from such childminders included:

“Some parents see nurseries as more official, better equipped and better quality”.

“They [i.e. parents] don’t always realize that we are registered through Ofsted too”.

Certain childminders also concurred that there was *“a lack of information that the 30 hours childcare offer is available through childminders, including information originating from the local authority”*.

However, it was observed how certain childminders acknowledged that (in the words of one of their number) *“...we are not as proactive in marketing as nurseries are”*.

A.5.2 The representatives of early years childcare settings who attended both focus group sessions repeated how, in their opinion, parents were still on a learning curve as far as *“navigating”* the 30 hours childcare offer was concerned, although the fundamentals about the eligibility processes were percolating to an ever improving extent. Such attendees praised the Haringey Providers Portal as being a source of information where they could check status in terms of eligibility. However the subject of information was repeatedly highlighted, particularly in terms of parental perceptions of the term ‘free’ – for example:

“Some parents still think that 30 hours is all free and any additional costs is included...”

“Parents are not always clear on the process and are unaware they need to register on the term before their child turns 3 years”.

“There have been times when parents turn up expecting to access a place, as they had made an initial enquiry, but have not followed the process through with receiving a code”.

“I have had a parent who assumed that they had completed the registration process, when in fact they had not... the parents continued to access the [30 hours childcare] offer but had to initially pay, which they were not pleased about”.

“The 30 hours ‘free’ childcare is misleading... It should really [in my opinion] be termed ‘30 hour subsidised childcare offer’”.

There was also support within the focus group session facilitated at Hornsey Schools for Girls for paper-based promotion to be circulated to parents of 0 – 2 year olds aligned to any possibility channels for such an approach, including through local Children’s Centres.

Ultimately a number of attending providers agreed that (a) there was only so much a setting, a childminder or the local authority could do and that the parents themselves had to be consistently advised (how) to research the processes, including around eligibility and re-confirmation themselves. and; (b) What all professionals should prioritise was making sure – as best and most effectively as they could – that there was clarity around eligibility, processes and timelines.