



# Ealing Childcare Sufficiency Assessment 2011

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# 1 Introduction

Welcome to Ealing's second Childcare Sufficiency Assessment (CSA). The last CSA was published in March 2008 with annual updates in 2009 and 2010.

The Childcare Act 2006 requires local authorities to:

- Secure sufficient childcare provision to meet the needs of working parents in their area for children up to the age of 14 (or 17 for disabled children)
- Carry out a sufficiency assessment of all the childcare in their area at least every 3 years.

This report looks at the supply and demand of childcare and explores the potential gaps in the local childcare market:

- Geographical gaps – general lack of childcare in an area
- Specific need gaps - shortage of childcare for disabled children, or children with other specific needs
- Income gaps - lack of affordable childcare
- Flexibility gaps - shortage of childcare when it is required by parents
- Age gaps - shortage of care suited to children of a certain age group
- Type Gaps – shortage of particular types of childcare

The aim of the CSA is to identify the largest or most serious gaps in Ealing's childcare provision.

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## 1.1 Methodology

A range of quantitative and qualitative methods have been used to collect information on the local childcare market.

Questionnaires were distributed to over 10,000 parents and all registered childcare providers in the London Borough of Ealing (LBE). A series of childcare questions were also incorporated into a survey carried out by the Ealing Service for Children with Additional Needs (ESCAN).

The Greater London Authority (GLA) commissioned Serco to consult with employers in London through an online questionnaire and by telephone interview.

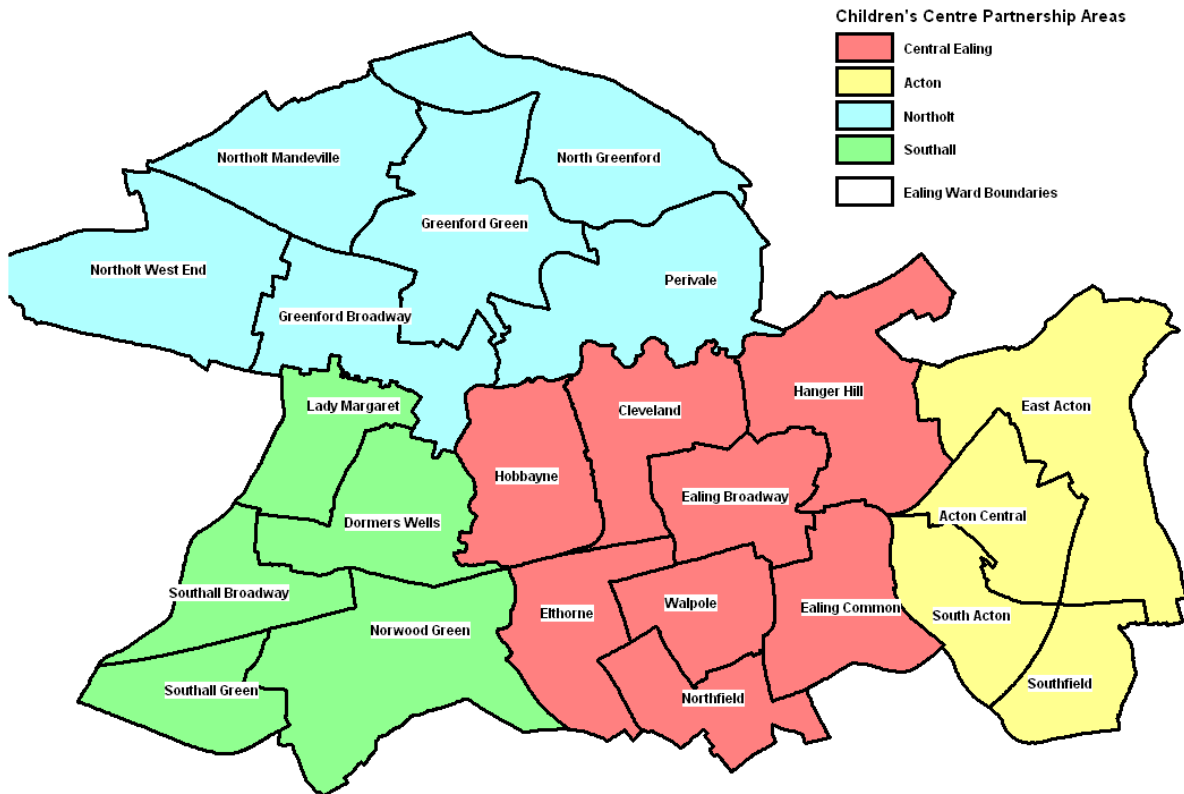
A variety of organisations with an interest in the provision of childcare were consulted, such as Jobcentre Plus and local colleges.

The views of children and young people were taken into account through participation work conducted by individual childcare providers and through the young persons section of the Council's Residents Survey where 350 young people aged between 11 and 17 were interviewed.

Ealing's Family Information Service (FIS) hold data on all the registered childcare in Ealing. This data was used to map the supply of childcare.

The report mainly provides data at Children's Centre Area Partnership level. There are four of these areas in the borough of Ealing, made up of council wards:

- **Acton** (Acton Central, East Acton, South Acton and Southfield wards)
- **Central Ealing** (Cleveland, Ealing Broadway, Ealing Common, Elthorne, Hanger Hill, Hobbayne, Northfield and Walpole wards)
- **Northolt** (Greenford Broadway, Greenford Green, North Greenford, Northolt Mandeville, Northolt West End and Perivale wards)
- **Southall** (Dormers Wells, Lady Margaret, Norwood Green, Southall Broadway and Southall Green wards)



## 2 Key Findings

### 2.1 The Ealing context

Ealing has a relatively large population of children and young people (2<sup>nd</sup> largest number of under fives in London from the latest GLA projections) which continues to increase in size. A high proportion of children in the borough live in poverty (30% compared to 21% average in England<sup>1</sup>) and household income levels are becoming more unequal across the borough (54% difference in incomes between the lowest (Southall Green) and highest (Walpole) wards<sup>2</sup>). Ealing's population is extremely diverse with a high proportion of Black and Minority Ethnic families (81% of pupils in Ealing's schools).

### 2.2 The main positive aspects to Ealing's childcare market

- The number of registered childcare places in the borough has grown (11% for under fives childcare) since the previous Childcare Sufficiency Assessment in 2008 and has more than kept up with the increase in the birth rate (5% growth between 07 - 09).
- There appears to be very high take up (estimate of 98%) of the free entitlement to early education for three and four year olds, and some vulnerable families are now also accessing free places for two year olds.
- Greater numbers of children with disabilities or additional needs are accessing childcare places through Children in Need and Inclusion funding<sup>3</sup>.
- Parents in general have a high level of satisfaction with Ealing's childcare providers (85% agreed or strongly agreed that they were satisfied with their childcare), and Ofsted inspection outcomes are improving (68% of inspections since Sep 2008 are good or outstanding compared to 51% before 2008).
- Many childcare providers are reporting high occupancy levels (36% of providers reported being completely full) and increasing demand (46% believed demand had increased in the last year compared to 32% believing it had dropped).
- Qualification levels for staff in Ealing's childcare providers are rising (88% of staff hold at least a level 3 qualification with a further 7% working towards this level<sup>4</sup>).

These link to Ealing's local priorities to **enjoy and achieve** and to **stay safe** from the Children and Young Peoples Plan (CYPP) 2010-11:

*"Give children the best start in life through high quality early years services."*

*"Transform outcomes for children and young people from vulnerable and under-achieving groups."*

*"Increase the opportunities for children and young people, to access co-ordinated play and constructive leisure opportunities."*

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<sup>1</sup> HMRC: NI116 The proportion of children in poverty snapshot as at 31 Aug 2008.

<sup>2</sup> CACI: Paycheck 2010 Unequalised median household income

<sup>3</sup> Children in Need Panel figures and Out of School Care Commissioning Grants for Inclusion

<sup>4</sup> Ealing Early Years Qualification Training Audit October 2010

## 2.3 The main gaps in Ealing's childcare market

### 2.3.1 Affordability gaps

The high cost of childcare and parents ability to pay is the biggest barrier to the take up of childcare in the borough.

Household income levels have not kept up with the increases in prices charged for childcare. Median household incomes rose by 1% between 2007 and 2010 whilst day nursery prices increased by 15% since the last CSA. In Southall and Northolt there have been large falls in household income, most likely because of a drop in the employment rate. However, there is some evidence nationally that the employment rate for parents has not dropped as much as for non-parents<sup>5</sup>.

Parents looking for work through Jobcentre Plus offices in Acton and Ealing, reported cost to be the main barrier to using out of school childcare, despite the relative stability of prices in this sector (prices for after school clubs rose by 6% and for holiday schemes fell by 3% since 2008).

Very low take-up (12%)<sup>6</sup> of the main government support for helping low income working families pay for childcare, makes it harder for families to afford childcare and means that potentially millions of pounds that would support Ealing childcare is going unclaimed. Ealing has dropped to 342<sup>nd</sup> out of all 354 local authorities for take up of the childcare element of Working Tax Credit<sup>7</sup>.

Many childcare providers in Southall and Northolt are reporting low occupancy levels, with an average of only 38% full in Southall. Parents are often choosing to use family and friends or look after their own children in these areas.

Ealing's local priority to **achieve economic wellbeing** (CYPP 10/11):

*"Reduce the number of children living in poverty, through increasing families' access to work opportunities, tax and income advice and affordable childcare."*

### 2.3.2 Geographical gaps

All gaps have a geographical element but some areas also have a general lack of childcare places. The Central Ealing area has the most childcare compared to other areas, but because of increases to household income levels and the popularity of childcare providers in this area, Central Ealing should be able to support more childcare. The W5 area in particular seems to have a high level of occupancy. Providers in the W5 area reported only 7% of available places being vacant.

Holiday schemes are not distributed evenly across the borough, so some families would have to travel to access these schemes. In Acton, all the summer schemes were clustered around the South Acton area.

Ealing's local priority to **achieve economic wellbeing** (CYPP 10/11):

*"Increase the opportunities for children and young people, to access co-ordinated play and constructive leisure opportunities."*

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<sup>5</sup> Office for National Statistics - Labour Force Survey Household Dataset Oct-Dec 2009

<sup>6</sup> HMRC - Provisional Tax Credits data December 2010

<sup>7</sup> HMRC - Finalised Tax Credits awards data 08/09

### 2.3.3 Specific need gaps

The number of pupils in Ealing schools with Special Educational Needs has increased by 14% since 2005<sup>8</sup>. This indicates an increasing level of need for childcare support, and although additional support has been introduced since 2008, it has not grown at the same pace as demand. Children allocated places through the Children in Need panel are having to wait for six months on average and often for over a year for suitable places in Children's Centres to become available. There are almost as many children on the waiting list(71) as the number currently placed(81).

Parents of children with disabilities or additional needs are reporting that inclusion issues are still the biggest (30%) barrier to them using childcare and also that lack of information (26%) is a problem. They were also less likely than other parents to agree that it was easy for them to find a place(32%), that their childcare is conveniently located(44%) and flexible(36%) and that there is a good choice of childcare in their area(22%).

Ealing's local priorities to **stay safe** and to **enjoy and achieve** (CYPP 10/11):

*"Transform outcomes for children and young people from vulnerable and under-achieving groups."*

*"Integrate children's services and prioritize early identification and intervention and support for parents."*

### 2.3.4 Age gaps

Parents looking for work through Jobcentre Plus offices in Ealing and Acton reported a lack of available places for under twos and for school aged children. This could stop some parents returning to work.

Quality criteria that determines which nurseries are eligible for the free two year old places and vacancy levels in general mean that not all parents that are approved by the two year old funding panel may be able to access a place. These parents are unlikely to be able to access childcare without this scheme.

For certain schools it may be difficult to find a place in a before or after school club for parents that do not wish to use a childminder.

Ealing's local priorities to **stay safe** and to **achieve economic wellbeing** (CYPP 10/11):

*"Transform outcomes for children and young people from vulnerable and under-achieving groups."*

*"Integrate children's services and prioritize early identification and intervention and support for parents."*

*"Reduce the number of children living in poverty, through increasing families' access to work opportunities, tax and income advice and affordable childcare."*

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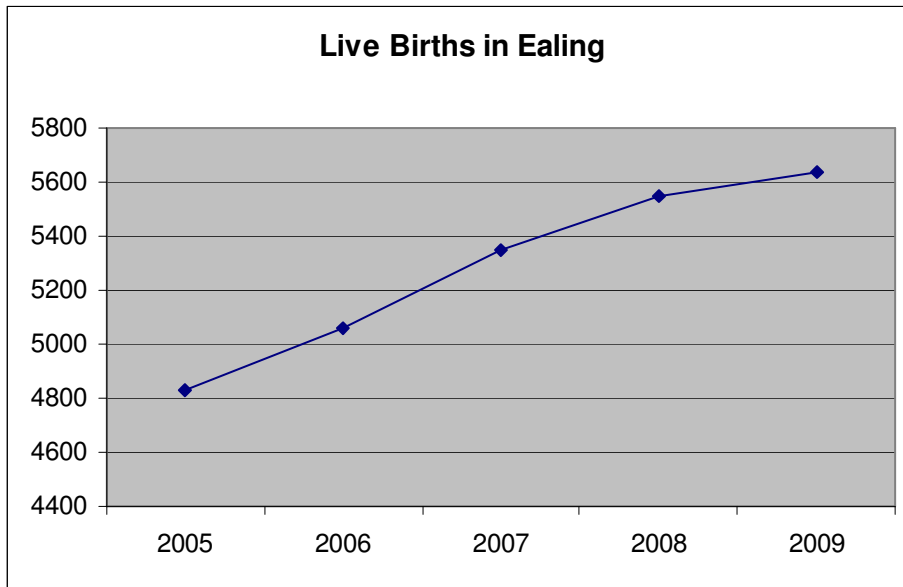
<sup>8</sup> January Schools Census 2005-11

### 3 Recent changes affecting Ealing's childcare market

#### 3.1 Population demographics / birth data

##### 3.1.1 Birth Rate

The birth rate continues to rise in Ealing but the rate at which it is growing has slowed down. The Office for National Statistics is projecting that birth rates have peaked and will gradually decline in future, although provisional ONS data for 2010 suggests that the birth rate may still be rising.



Source: Office for National Statistics

##### 3.1.2 Projected population of under fives

The under fives population in 2008 was estimated at 23,800 so the current projection for 2011 is an increase of 7%. The official figures assume that the birth rate has already peaked so the under fives population will gradually decline from 2012 onwards.

	2011	2012	2013
0 – 4 year olds	25,500	25,700	25,600

Source: © GLA 2010 Round Demographic Projections

##### 3.1.3 Projected population of three and four year olds

The latest population projections for three and four year olds show an increase for 2012 and a small decline in 2013.

	2011	2012	2013
Three year olds	5100	5000	5000
Four year olds	4700	5000	4900
Total 3 + 4 year olds*	9700	10000	9900

Source: © GLA 2010 Round Demographic Projections

\*Figures may not sum due to rounding

### 3.1.4 Projected population of 5 – 14 year olds

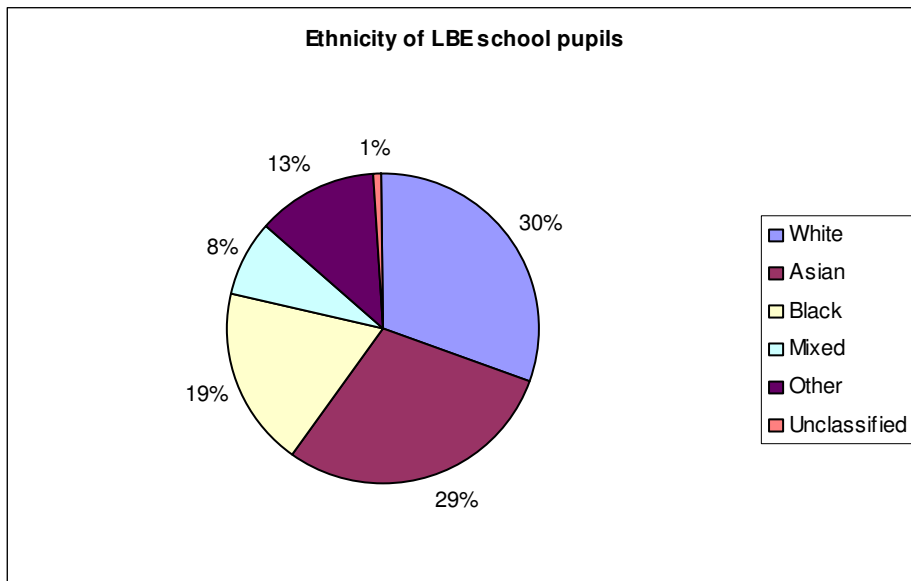
The number of 5 – 14 year olds in 2008 was estimated at 19,579 so the current projection for 2011 is an increase of 4%. Because of the time delay after changes to the birth rate for this age group, the numbers of 5 – 14 year olds should grow for the next few years.

	2011	2012	2013
Total 5 - 14 year olds	20,300	20,700	21,200

Source: © GLA 2010 Round Demographic Projections

### 3.1.5 Ethnicity of pupils in Ealing Schools

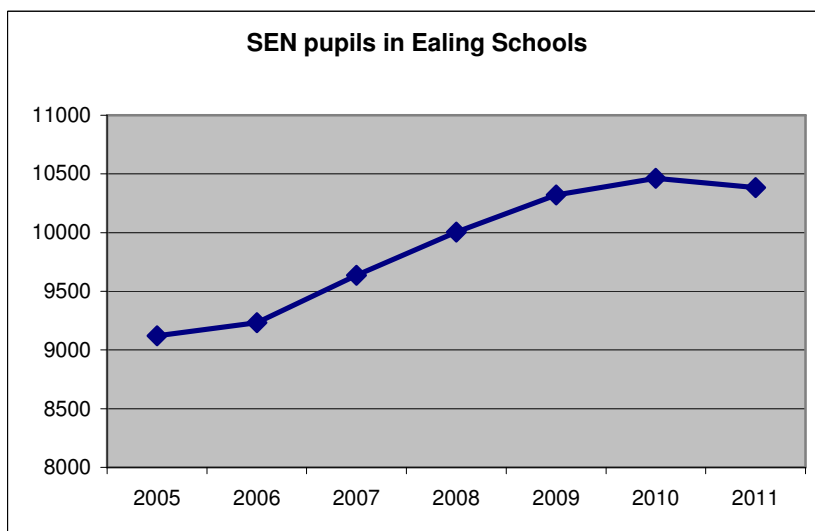
In the Spring 2011 census, 81% of pupils in Ealing’s schools were classified as being of minority ethnic origin and 57% of all pupils in Ealing did not speak English as their first language.



Source: Ealing Schools Service Spring 2011 Schools Census

### 3.1.6 Pupils in Ealing Schools with Special Educational Needs (SEN)

The number of SEN pupils in Ealing Schools has risen by 14% since 2005. This is likely to continue to rise in the near future, as the increase in the birth rate will take a while to filter through to the School population.

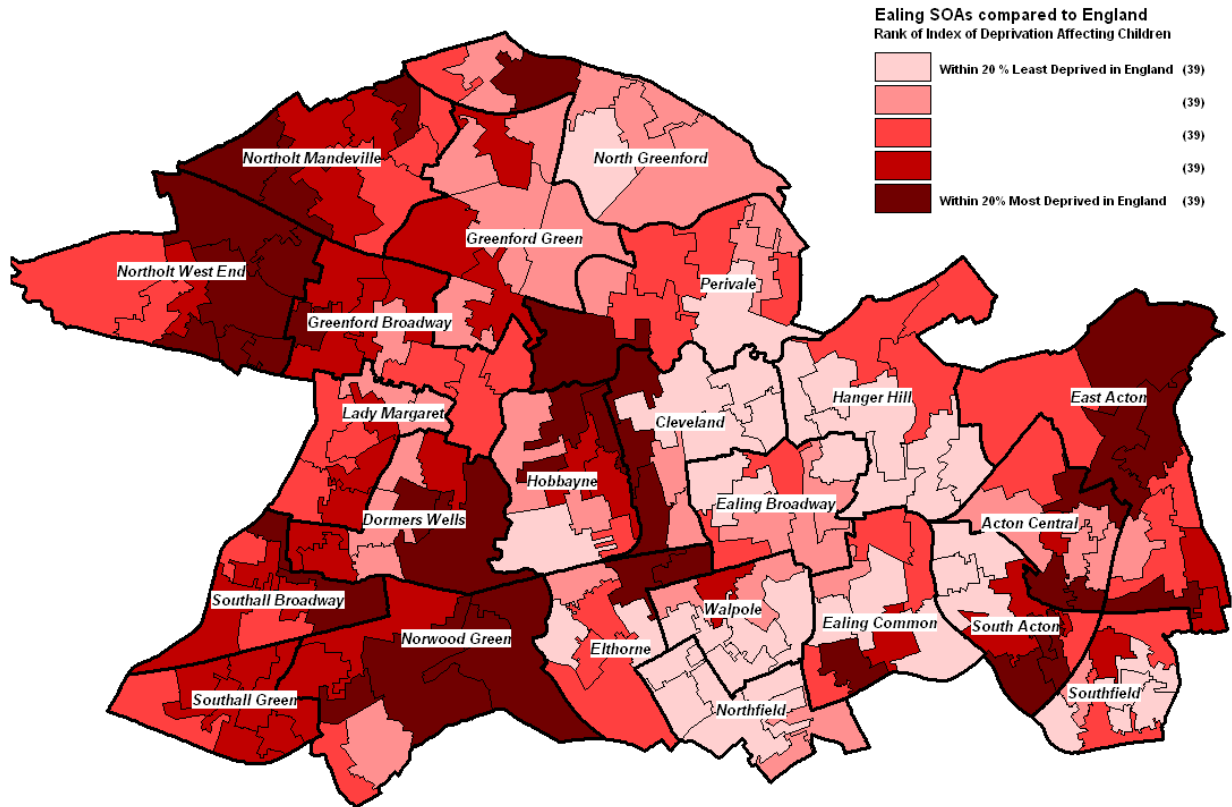


Source: January Schools Census 2005-11

### 3.1.7 Income Deprivation Affecting Children

The Income Deprivation Affecting Children Index (IDACI) measures the proportion of children aged under 16 who live in low income households. The map below shows the proportion of children in Ealing that live in low income households compared to households in England.

There are large areas and pockets of income deprivation in all areas of the borough, although Northolt and Southall stand out as being almost entirely within the more deprived ranges.

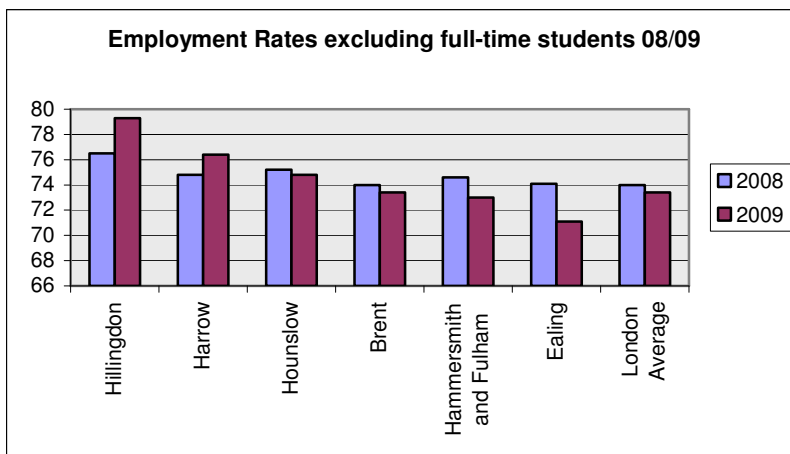


Source: DCLG Income Deprivation Affecting Children Index 2007

## 3.2 Local economic activity

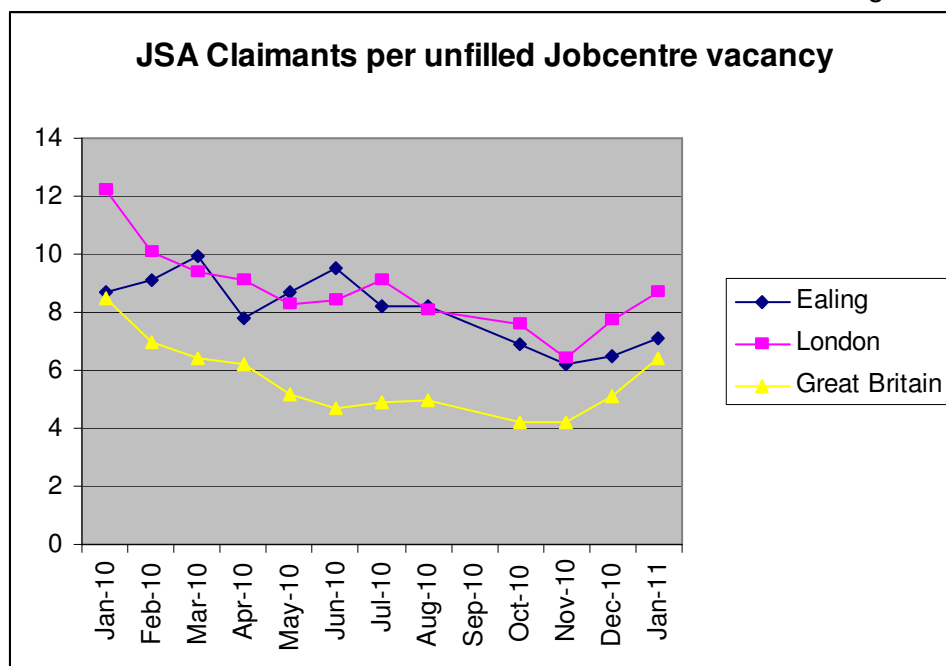
### 3.2.1 Local labour market

The employment rate has dropped in Ealing and was lower in 2009 than the London average and all the surrounding West London Local Authorities.



Source: Office for National Statistics Annual Population Survey 2008 and 2009

The number of Jobseekers Allowance (JSA) claimants relative to unfilled vacancies was dropping for most of 2010 but there has been a recent increase both in Ealing and nationally.



Source: Office for National Statistics

### Working age benefit claimants May 2010

Benefit	Ealing (Numbers)	Ealing (%)	London (%)	Great Britain (%)
Job seekers	8,370	3.8	3.8	3.5
ESA and incapacity benefits	12,730	5.8	5.9	6.7
Lone parents	4,890	2.2	2.4	1.7
Others on income related benefits	1,100	0.5	0.5	0.5
Key out-of-work benefits	27,090	12.3	12.7	12.4

Source: DWP benefit claimants - working age client group  
% is a proportion of resident population of area aged 16-64

### Employment rates by parenthood

The chart below shows the rate of employment among parents compared to non-parents. The largest drop in employment in 2009 was among male non-parents in London. Parents were less affected by the drop in employment rates, although lone parents and female parents in couples remain less likely to be in employment in London than in the rest of the UK. It should be noted that single earner couples would be ineligible for help with childcare costs through the working tax credit, although they still count as being eligible in the official figures for take up of the childcare element.

		2007		2008		2009	
		London	Rest of UK	London	Rest of UK	London	Rest of UK
Not parents:	Men	79	76	80	76	75	73
	Women	77	77	78	77	77	77
Couple parents:	Men	89	92	89	91	87	90
	Women	58	74	60	73	59	73
Lone parents:	All	42	57	49	59	48	59

Source: Office for National Statistics Labour Force Survey Household Dataset Oct-Dec 2009

## Commuting Patterns for Ealing

The tables below show where Ealing residents work and where people working in Ealing live. It shows that many Ealing residents commute to work outside of the borough, often to work in central London. It is less common for people living in a different local authority to work in Ealing.

Place of work for Ealing residents		Place of residence for Ealing workers	
Local Authority	%	Local Authority	%
Ealing	33.7	Ealing	51.7
Hillingdon	9.2	Hillingdon	8.3
Westminster	7.1	Hounslow	7.7
Hounslow	6.8	Harrow	3.7
City of London	6.2	Brent	3.4
Southwark	5.6	Richmond upon Thames	2.4
Brent	4.9	Haringey	1.8
Hammersmith and Fulham	3.9	Westminster	1.5
Camden	3.5	Slough	1.5
Harrow	2.6	Barnet	1.4

Source: Office for National Statistics Annual Population Survey 2008

### 3.2.2 Household Income levels

Comparing median household income levels from 2007 and 2010 shows very little difference in incomes for the borough as a whole.

	2007	2010	% Change
LBE	£33,100	£33,400	+1%

Source: Unequalised Median Household Incomes CACI Paycheck 2007 and 2010

There were large differences between different parts of the borough. Most wards in Southall saw a drop in what were already low household incomes whilst wards in the Central Ealing area showed large increases.

#### Biggest increases in median household income

Ward	2007	2010	Difference 07 - 10	% Change
Walpole	£39,100	£43,700	+£4,600	+12%
Hanger Hill	£39,000	£43,400	+£4,400	+11%
Southfield	£39,900	£43,600	+£3,700	+9%
Cleveland	£35,500	£38,300	+£2,800	+8%
Ealing Broadway	£40,300	£42,600	+£2,300	+6%

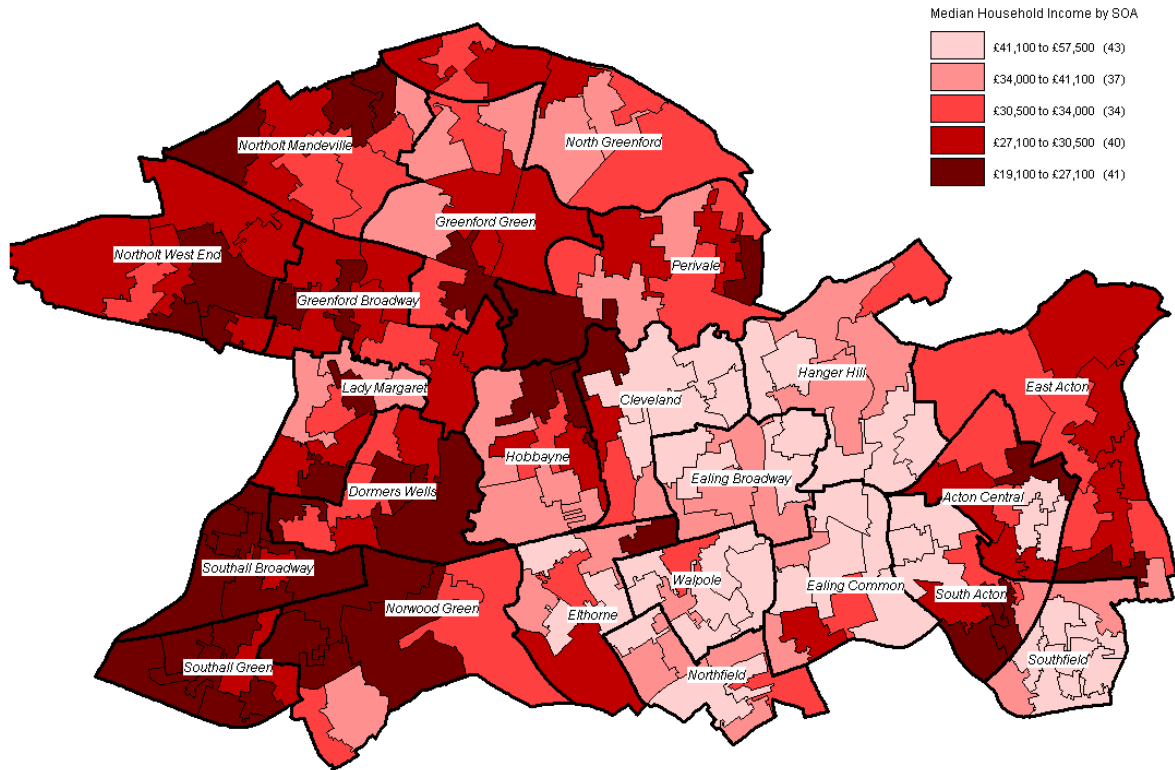
Source: Unequalised Median Household Incomes CACI Paycheck 2007 and 2010

#### Biggest falls in median household income

Ward	2007	2010	Difference 07 - 10	% Change
Southall Green	£27,500	£25,100	-£2,400	-9%
Norwood Green	£29,100	£26,900	-£2,200	-8%
Southall Broadway	£26,900	£25,100	-£1,800	-7%
East Acton	£32,000	£30,200	-£1,800	-6%
Northolt West End	£27,900	£26,900	-£1,000	-4%

Source: Unequalised Median Household Incomes CACI Paycheck 2007 and 2010

The following map shows household incomes at SOA level for the borough. Southall stands out as having large areas in the lowest income range. There are also areas with lower incomes in Acton, Northolt, Greenford, Hanwell and Acton. Ealing and Chiswick are almost exclusively in the higher income ranges.



Source: CACI Paycheck 2010

### 3.3 Policy changes / pilots

#### 3.3.1 Changes to Tax Credits from April 2011

The government is reducing the level of financial support to help low income working parents to pay for childcare from April 2011. The childcare element of working tax credits will now only pay up to 70% of eligible childcare costs instead of 80%. For a family with two or more children, eligible for the maximum level of support, this would equate to £30 a week less.

#### 3.3.2 Changes to Childcare vouchers from April 2011

The amount of vouchers that higher rate taxpayers will be able to claim is going to fall from April 2011. Anyone already in the voucher scheme by this date will be able to carry on claiming at the current maximum level of £55 per week.

#### From April (per parent):

Basic rate (20%) Taxpayer. Allowed £55 per week vouchers  
Higher rate (40%) Taxpayer. Allowed £28 per week vouchers  
Top rate (50%) Taxpayer. Allowed £22 per week vouchers

#### 3.3.3 Changes to Child Benefit from April 2011

Child benefit will be frozen for three years and removed from families with a higher rate tax payer.

#### 3.3.4 Early Years Single Funding Formula

All local authorities must introduce an early years single funding formula (EYSFF) for the free entitlement to early years provision in the maintained, private, voluntary and independent sectors from April 2011. The table below shows the agreed rates per pupil per hour for Ealing.

BAND	A Maintained nursery schools	B Maintained nursery classes and private nurseries	C Voluntary nurseries pre-schools and play groups	D Independent nursery classes
Base Rate	£5.88	£3.31	£3.50	£2.71
Workforce Development	£0.665	£0.665	£0.665	£0.665
Flexibility	£0.070	£0.070	£0.070	£0.070
Max funding	£6.615	£4.045	£4.235	£3.445
Min funding	£5.88	£3.31	£3.50	2.71

In addition to these rates there will be additional funding for deprivation at an annual rate of £85.50 per pupil. All settings in the 25% most deprived areas will receive this supplement for all children. Settings not in these areas will be funded based on the postcode of individual children living in the 25% most deprived areas.

The new formula will be piloted with transitional protection during April 2011–12. This will ensure that no setting will gain or lose financially by more than 10% due to the implementation of these new funding arrangements.

Following this pilot year, the formula will be reviewed so that any lessons can be built into future funding arrangements. The authority is able to continue implementing a transition arrangement for a further two years to March 2014.

#### 3.3.5 Ealing's Children's Centres Programme

Ealing currently has 23 Children's Centres with a further 4 in development. 5 of these contain Local Authority run EY provision and 13 contain provision run by private, voluntary or independent (PVI) providers. Most of these Centres involved new building work, and without this new

infrastructure it is unlikely that Ealing would have had the same level of growth in places as finding/buying/building suitable premises and getting planning permission are major barriers for new childcare settings.

As there are currently only 4 more centres in development, any new EY provision is likely to come from the PVI sector in future (apart from free entitlement provision which can be in nursery classes attached to schools).

### **3.3.6 Childcare Holiday Improvement Pilots (CHIPs)**

Using grant funding from the Department of Children, Schools and Families (DCSF), CHIPs in Ealing targeted 4 key issues affecting holiday childcare provision in the borough:

- Business development and planning
- Training and recruitment
- Providers development
- Financial support for specific projects

Providers were supported through the early stages of setting up a new childcare business and with targeting areas of greatest need.

A playwork staffing agency was set up and training commissioned to increase the pool of qualified staff able to work in the sector.

A referral-only holiday childcare project for children from low income families that had not attended provision before was ran in the summer and subsequent half terms. The scheme was free to participants with all the children attending being referred by schools, family support, social services and other agencies. Feedback from schools and other agencies concerning this project indicate that the scheme was invaluable for the development of those children and supporting their families.

### **3.3.7 Disabled Children's Access to Childcare (DCATCH) Pilot**

#### **DCATCH Better Data project**

This project has been set up using DCATCH pilot funding to identify the number of children with a disability in the borough, what that disability is and the type and level of services they receive.

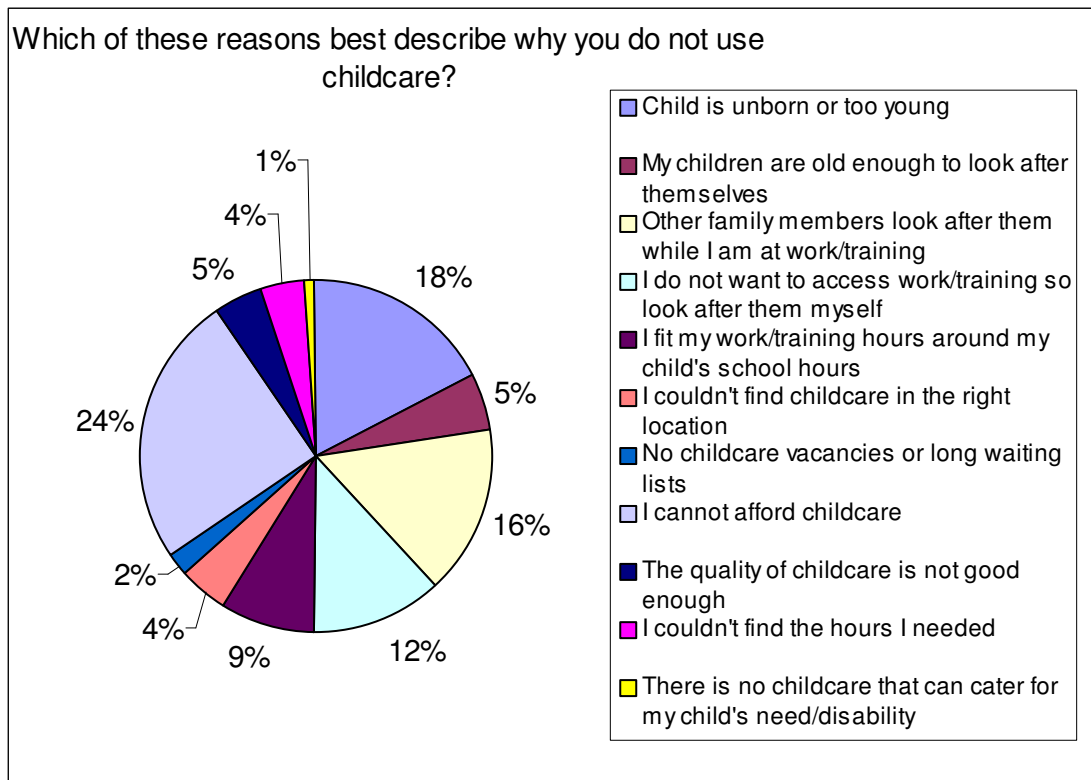
This required combining several data sets from Education, Social Care, Youth & Connexions and Ealing PCT, using matching software to check for duplicates. This will enable better planning of future service requirements for various services. The initial baseline number of children in the borough with disabilities should be available from April 2011, with further analysis of types of disability and services received to follow.

## 4 Demand for childcare in Ealing

Based on respondents to the FIS parents survey, just over half (55%) of families in the borough are using some form of formal childcare for at least one of their children. It is likely that this figure is inflated as the survey tended to be filled out by parents with younger children who are more likely to use childcare. Parents using childcare may also have had more interest in childcare and therefore more interest in filling out the survey.

### 4.1 Reasons for not using childcare

The main reasons given for not using childcare were the cost, the age of the child and using other family members to look after them.



Source: FIS survey of 840 Ealing parents 2010

The reasons given can be split into categories for the support that would be required to enable these families to access childcare.

#### **Don't want (fit around school, don't want to work, use family) 37%**

These families could possibly be persuaded to use childcare if the educational and social benefits of childcare to the child were promoted, but they may be resistant to the idea of leaving their child with someone else.

#### **Cost 24%**

In order to access childcare, these families may need support in claiming help with childcare costs or support with entering into employment.

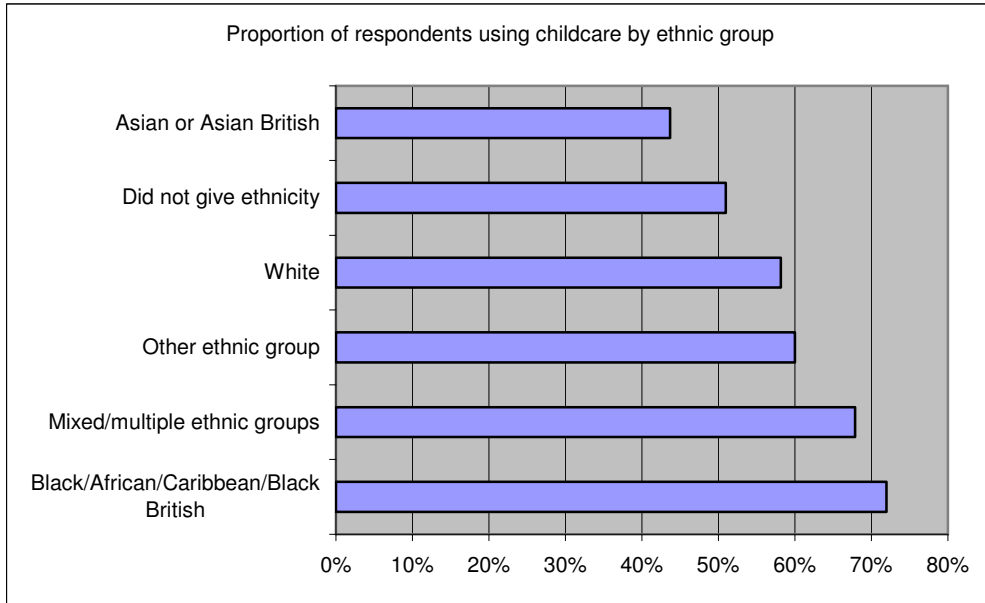
#### **Don't need (child too old or too young) 23%**

These families are unlikely to be persuaded to use childcare unless their circumstances change.

**Difficulty accessing (quality, waiting lists, hours, location, disability) 16%**

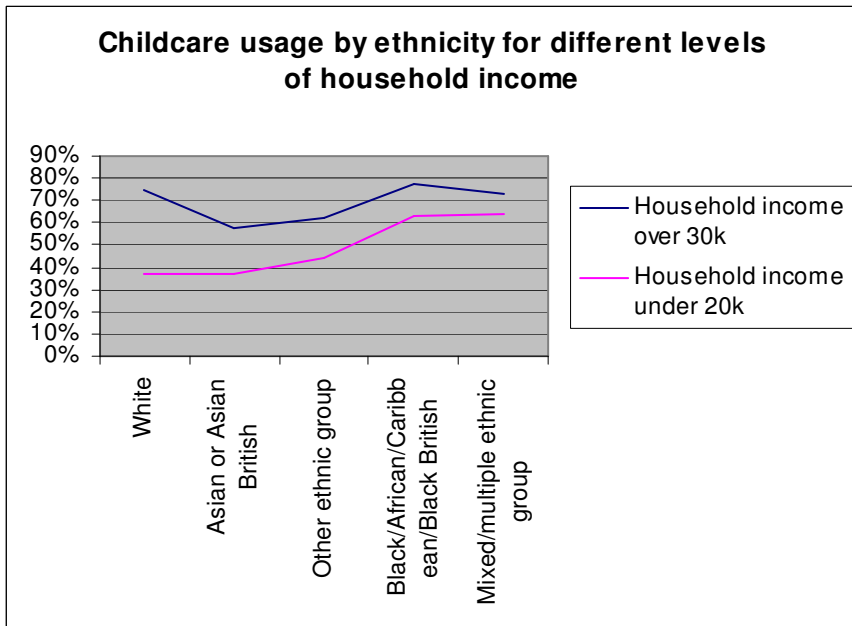
These families would only be able to use childcare if there were improvements in local childcare provision.

**4.1.1 Childcare usage by ethnic groups**



Source: FIS survey of 840 Ealing parents 2010

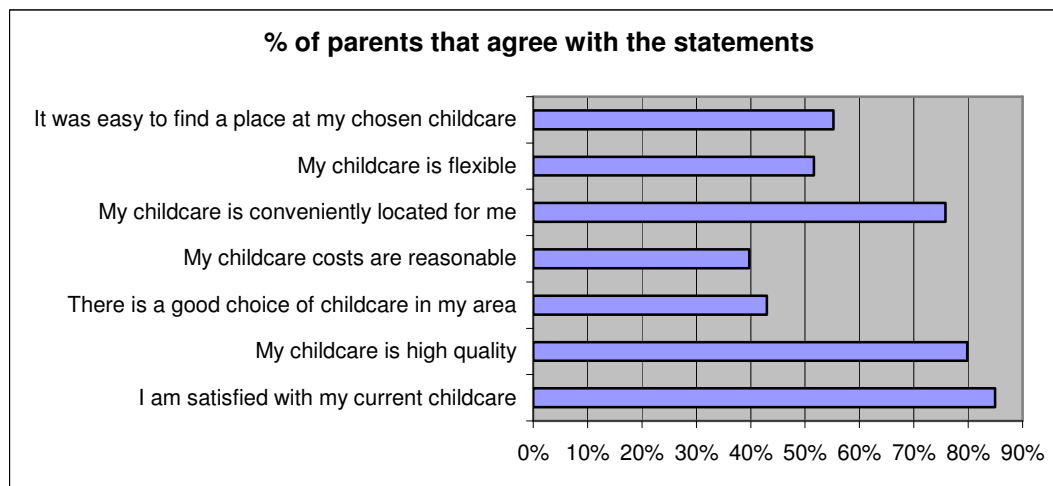
In order to try and control for different income levels, the chart below shows different take up rates for ethnic groups with household incomes over 30k and under 20k. Generally the usage of childcare is about 20% higher in the higher income band except for White respondents where there was a much bigger difference (38%). This shows that the childcare usage for Asian respondents was generally lower and not just because of these respondents being over represented in the lower household income groups.



Source: FIS survey of 840 Ealing parents 2010

#### 4.1.2 Parents views of the local childcare market

Parents using childcare were asked whether they agreed with statements about their childcare provider. The chart below shows the results. Respondents reported high levels of satisfaction in general with high scores for quality of the provision and for the convenience of the location. The lowest scores were for affordability and the range of childcare options available.



Source: FIS survey of 840 Ealing parents 2010

The Councils annual Residents Survey interviewed 3,365 residents in Ealing and asked how satisfied residents were with various services within the borough and also which services people had used. 19% of residents said they had experience of the boroughs nursery education (under 5s) facilities, and excluding the residents who said they did not know about these services, 67% of residents said they were satisfied or very satisfied.

#### 4.1.3 Children or young persons views of local childcare

350 young people aged between 11 and 17 were interviewed as part of the Residents Survey. Respondents were asked which 3 issues they were most concerned about and although childcare wasn't listed as an option and wouldn't necessarily apply for older children, the top two issues in 2010 could generally apply to facilities for young people. The top five issues for young people in 2009 and 2010 are listed below.

	2009	2010
Not enough being done for young people	14%	30%
Lack of recreational facilities	15%	18%
Crime: including anti-social behaviour and terrorism	29%	18%
Lack of jobs	7%	15%
Lack of jobs for young people	11%	13%

Source: Ealing Young Persons Survey of 350 Ealing young persons 2010

#### 4.1.4 Barriers to childcare usage for jobseekers

Managers from Ealing and Southalls Jobcentres stated that childcare continues to be an issue for jobseeking parents. There is a general mistrust of childminders and Ealing stated that this would especially be the case for parents with children aged 0-2 but the cost of nursery places for these children is very high. Southall stated that there are cultural issues which means parents prefer to look after their own children.

#### Acton Jobcentre Plus

The table below shows markers placed on individual customers records when they state that they have barriers accessing childcare. The second table shows the type of childcare these customers were seeking. These figures were produced for September 2010. The All Time column represents the total number being held on the Acton Jobcentre Plus system.

The main barriers reported in Acton were the availability of places and cost of provision for under twos and children aged 8 – 11.

Barriers	Age of children							Sep Total	All Time
	0 - 2	3 - 4	5 - 7	8 - 11	12 - 14	15 - 16	17 - 18		
Provision Places	12	1	2	7	1	2	0	25	422
Opening hours	0	0	1	1	0	0	0	2	67
Cost	6	2	1	4	0	0	0	13	194
Transport Links	0	0	1	0	0	1	0	2	6
Disabled Children	0	1	0	0	0	0	0	1	12
Cultural Needs	0	0	0	0	0	0	0	0	105
Other	0	1	1	3	0	0	0	5	526
Totals	18	5	6	15	1	3	0	48	1332

Childcare Type	Age of children							Sep Total	All Time
	0 - 2	3 - 4	5 - 7	8 - 11	12 - 14	15 - 16	17 - 18		
Day Nursery	11	3	1	1	0	0	0	16	391
Nanny	6	0	0	1	0	0	0	7	229
Breakfast Club	0	1	1	5	1	1	0	9	446
After School Club	0	1	2	12	1	1	0	17	618
Holiday Club	0	1	1	5	1	2	0	10	446
Home Childcarer	2	0	0	0	0	0	0	0	49
Informal	2	1	0	0	0	0	0	3	140
Childminder	3	0	0	0	0	0	0	3	248
Playgroup	0	0	0	0	0	0	0	0	127
Totals	23	7	5	24	3	4	0	65	2694

### Ealing Jobcentre Plus (Covers Ealing and Northolt areas)

The main barriers reported in Ealing were cost and then availability of places. Ealing had more problems for parents with older children trying to access out of school childcare.

Barriers	Age of children							Sep Total	All Time
	0 - 2	3 - 4	5 - 7	8 - 11	12 - 14	15 - 16	17 - 18		
Provision Places	4	5	10	9	2	1	0	31	969
Opening hours	0	0	1	1	0	0	0	2	61
Cost	16	5	16	25	7	1	0	70	2063
Transport Links	0	0	0	0	0	0	0	0	9
Disabled Children	0	0	0	2	0	0	0	2	36
Cultural Needs	0	0	1	0	0	0	0	1	27
Other	4	1	7	11	3	1	0	27	718
Totals	24	11	35	48	12	3	0	133	3883

Childcare Type	Age of children							Sep Total	All Time
	0 - 2	3 - 4	5 - 7	8 - 11	12 - 14	15 - 16	17 - 18		
Day Nursery	14	5	1	0	0	0	0	20	597
Nanny	2	1	0	0	0	0	0	3	88
Breakfast Club	0	1	18	19	3	1	0	42	1107
After School Club	0	3	20	27	5	1	0	56	1462
Holiday Club	0	1	11	16	3	1	0	32	1121
Home Childcarer	0	0	0	1	3	0	0	4	55
Informal	7	0	1	5	3	0	0	16	372
Childminder	14	2	4	8	3	0	0	31	910
Playgroup	0	1	0	0	0	0	0	1	155
Totals	37	14	55	76	20	3	0	205	5867

### Southall Jobcentre Plus

In Southall, the majority of the recent problems reported appear to be the cost of day nursery provision for under twos.

Barriers	Age of children							Sep Total	All Time
	0 - 2	3 - 4	5 - 7	8 - 11	12 - 14	15 - 16	17 - 18		
Provision Places	1	3	0	0	0	0	0	4	143
Opening Hours	1	0	1	1	0	0	0	3	90
Cost	18	3	0	0	1	0	0	22	299
Transport Links	0	0	0	0	0	0	0	0	3
Disabled Children	0	0	0	0	0	0	0	0	2
Cultural Needs	0	0	0	0	0	0	0	0	1
Other	2	0	0	0	0	0	0	2	90
Totals	22	6	1	1	1	0	0	31	628

Childcare Type	Age of children							Sep Total	All Time
	0 - 2	3 - 4	5 - 7	8 - 11	12 - 14	15 - 16	17 - 18		
Day Nursery	17	3	0	0	1	0	0	21	212
Nanny	2	1	0	0	0	0	0	3	51
Breakfast Club	0	1	0	0	0	0	0	1	101
After School Club	0	1	1	1	0	0	0	3	117
Holiday Club	0	0	0	0	0	0	0	0	63
Home Childcarer	0	0	0	0	0	0	0	0	2
Informal	0	0	0	0	0	0	0	0	24
Childminder	2	1	0	0	0	0	0	3	149
Playgroup	1	0	0	0	0	0	0	1	24
Totals	22	7	1	1	1	0	0	32	743

#### 4.1.5 Barriers to childcare usage for students

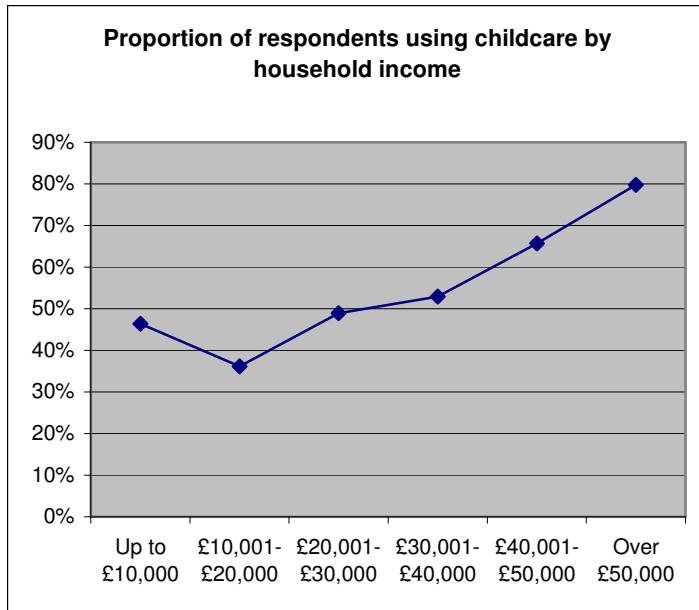
##### Issues reported from Ealing, Hammersmith & West London College:

- Awareness of the care to learn fund is very low
- Parents could not get the information needed
- Places not available
- Hours were not flexible
- Fees too high
- Doubts about standards/quality
- Issues of trust
- Lack of support for children with additional needs

#### 4.2 Household income and ability to pay for childcare

##### 4.2.1 Childcare usage compared to income

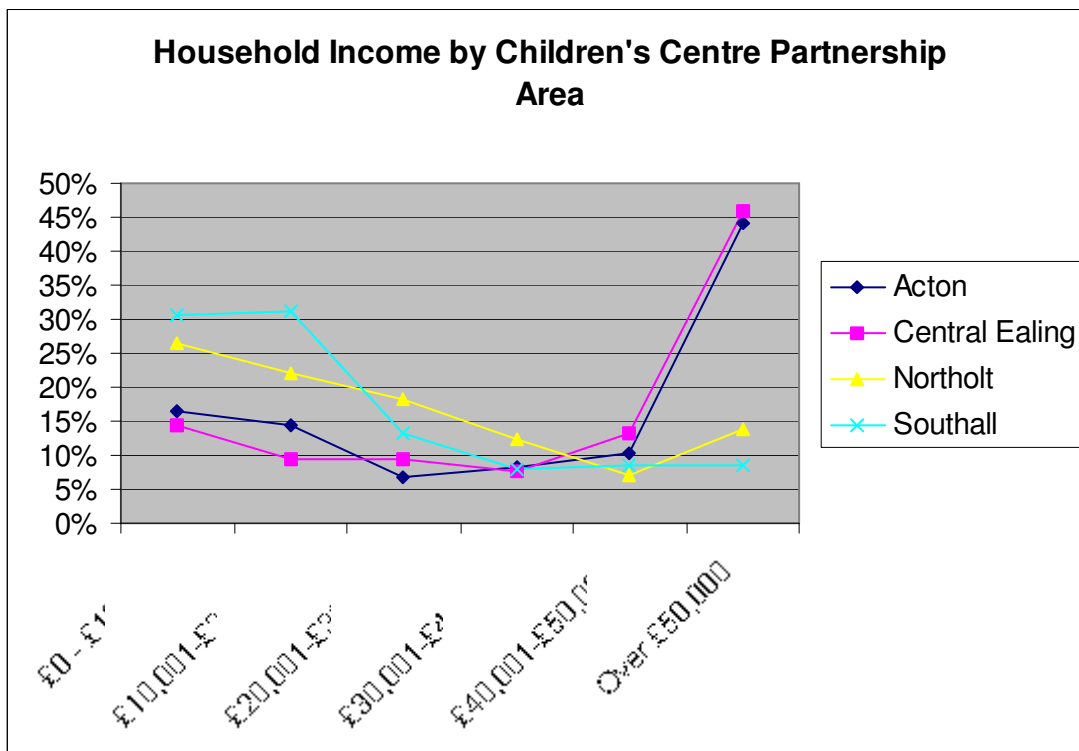
The table below shows the relationship between the household income and the usage of formal childcare. In general childcare usage increases with income. The parents earning less than £10,000 per annum may have a slightly higher take up of childcare as this group could include full time students eligible for childcare grants.



Source: FIS survey of 840 Ealing parents 2010

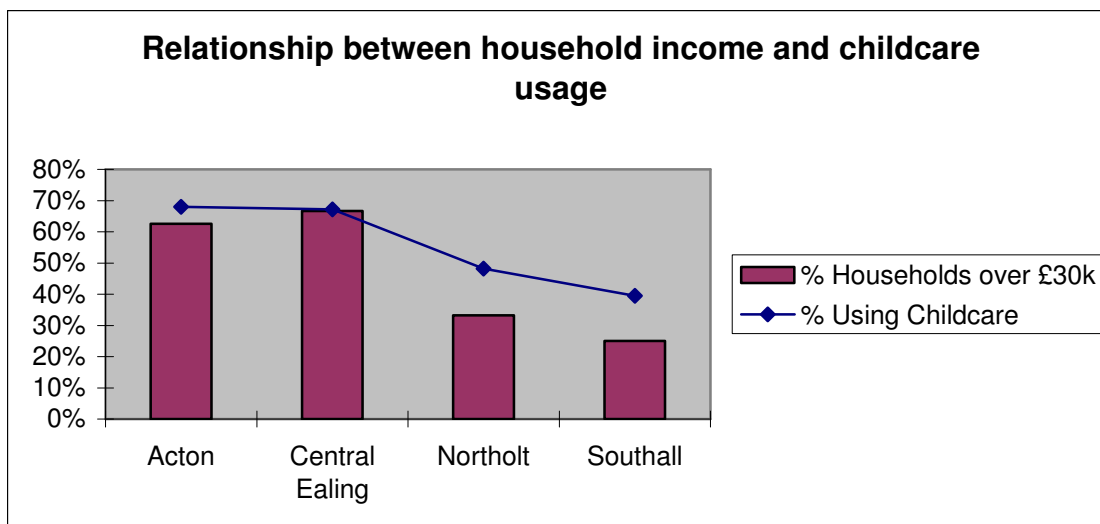
#### 4.2.2 Household income levels in Ealing

The chart below shows reported household income levels by Children’s Centre Partnership Area. Households in Central Ealing and Acton were much more likely to have incomes over 50k, whilst respondents in Southall and Northolt were more likely to be in the lowest two income groups.



Source: FIS survey of 840 Ealing parents 2010

The chart below shows the proportion of respondents using childcare in each Children’s Centre Partnership Area and the proportion of households with income over 30k. It shows usage of childcare and household income to be much lower in the Northolt and Southall areas.



Source: FIS survey of 840 Ealing parents 2010

#### 4.2.3 Take up of the childcare element of Working Tax Credit

This is the main government support available to help low income working parents with the cost of childcare. Latest finalised award data from HMRC for 08/09 shows that Ealing has dropped to 342<sup>nd</sup> place out of 354 local authorities for take up of the childcare element. When figures started in 04/05 Ealing was 148<sup>th</sup>.

Ealing had 1,500 claimants of the childcare element out of a possible 11,760 families (12.73%) that were claiming the working tax credit and were eligible for the childcare element. The average in England was 17.98%.

Research from HMRC<sup>9</sup> suggests these figures include many parents that cannot actually claim. Looking at the characteristics of the families not claiming the childcare element, around 42% would not be eligible. Employment data shows that single earner couples are much more common in London so this percentage may be even larger for Ealing.

- Around 33% are ineligible single earner couples, so irrespective of whether they use eligible childcare, they cannot claim childcare element.
- Around 7% are families whose youngest child is aged 15+, who are therefore either unlikely to be eligible for childcare element, or are too old to require childcare in any case.
- Around 2% are using eligible forms of childcare, but it is unpaid, so they do not require financial assistance to pay for it.
- Around 29% are using only ineligible forms of childcare, such as relatives or friends
- The remaining 29% do not use any childcare – perhaps because their children are too old to need care, or the parent looks after the child themselves.

Provisional data for Dec 2010 suggests Ealing had 1,600 claimants out of 13,400 families (11.94%), so whilst the number of claimants is rising it is not keeping up with the numbers of potential claimants. Using the HMRC research as a guide, only about 58% of the 11,800 families currently not claiming would be able to claim if they started using formal paid childcare.

<sup>9</sup> Working Tax Credit: Take-up of Childcare Element 2008-09

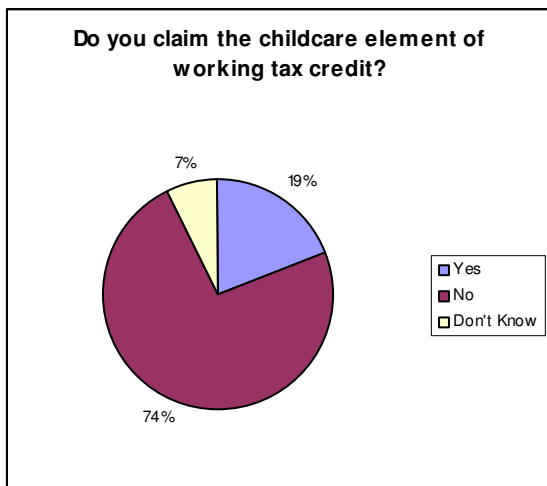
### Loss to the local economy / childcare market

Even if you account for the estimated numbers of families that are not actually eligible, given that the average payout families were awarded for the childcare element was £70 per week or £3600 per year, Ealing families could currently be claiming in the region of an additional £480,000 per week or over £24 million per year in childcare costs (parents would still need to find an extra £25 a week / £1300 a year as the childcare element only covers 80% costs). This would potentially mean £33 million extra spent on childcare if you include the parent's portion.

This is potentially a massive loss to the local economy and to families not getting the benefits of registered childcare.

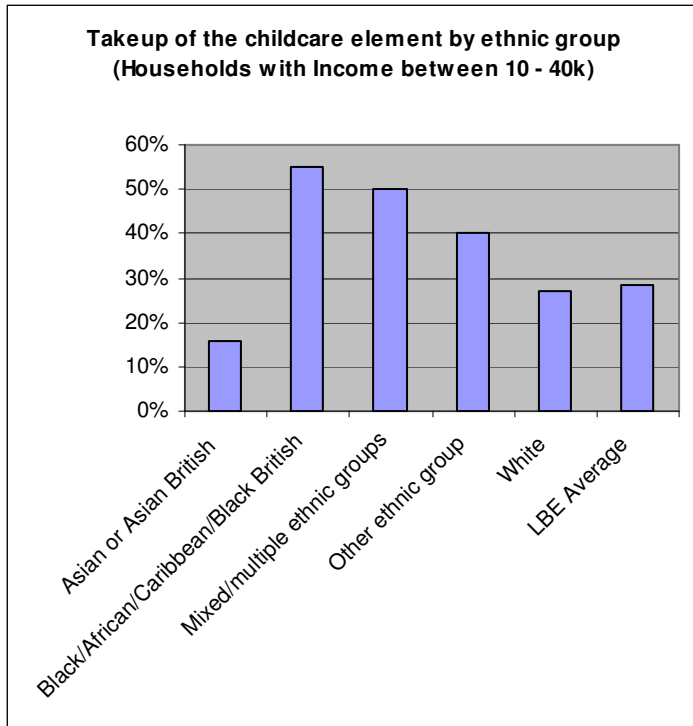
### Reasons for low take up in Ealing

19% of parents surveyed by the FIS said they were claiming the childcare element. Childcare usage is higher for younger children, so as our survey was filled out by more parents with younger children this could explain the figure being higher than the HMRC data. It is also possible that some parents confused the childcare element with the more easily claimable child tax credit, as there was also confusion from parents about whether they were eligible.



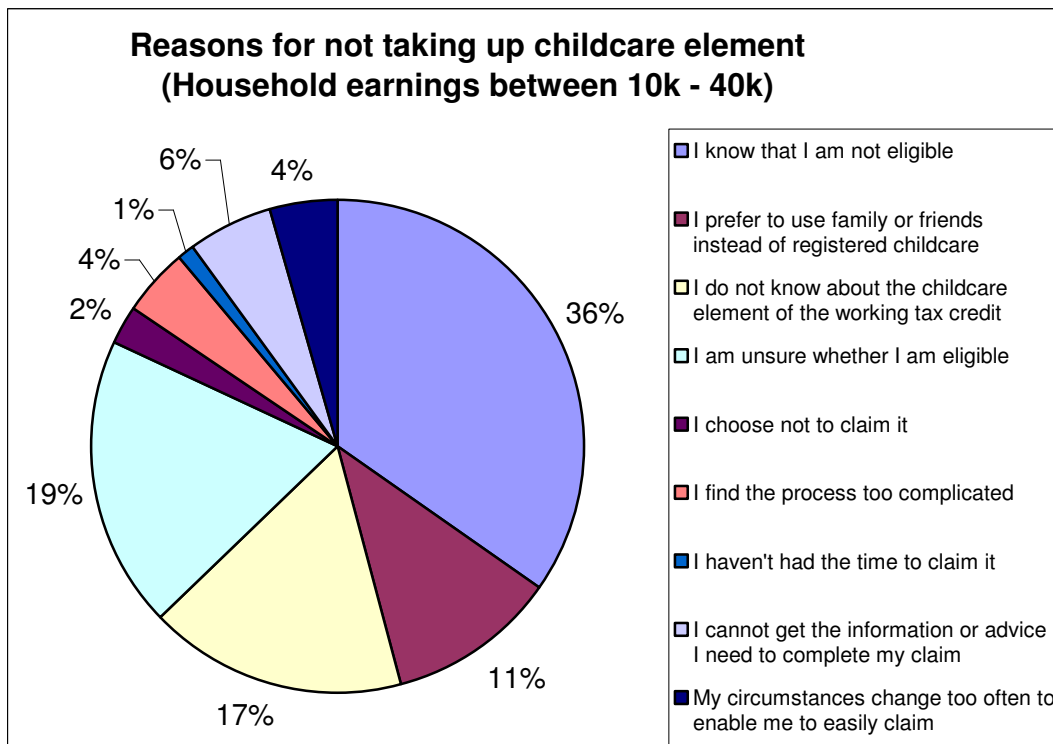
Source: FIS survey of 840 Ealing parents 2010

There was a difference in the reported levels of take up between different ethnic groups. Asian parents reported much lower take up and although this may be related to lower levels of childcare usage for Asian parents in general, the same is not true amongst White parents who also had below average take up. As there are other local authorities with similar demographics to Ealing, ethnicity is unlikely to be the sole cause of the low take up rate.



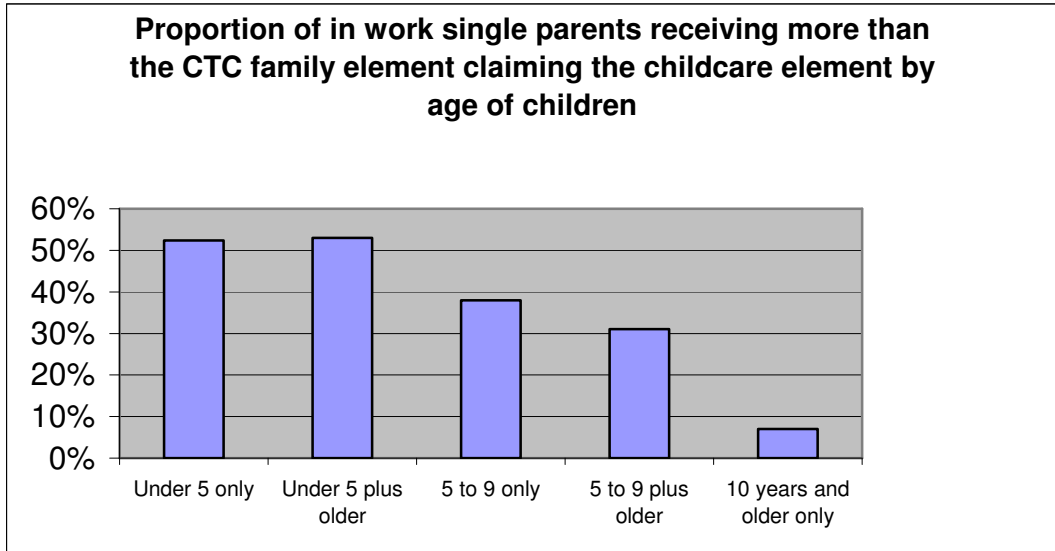
Source: FIS survey of 840 Ealing parents 2010

The chart below shows the reasons parents gave for not taking up the childcare element. The main reason other than not being eligible was not knowing about the childcare element or not knowing if they were eligible. Results were restricted to households income levels between £10k – 40k as these are more likely to be eligible. Households with income under £10k are probably not working the minimum number of hours a week (16) needed to be eligible.



Source: FIS survey of 840 Ealing parents 2010

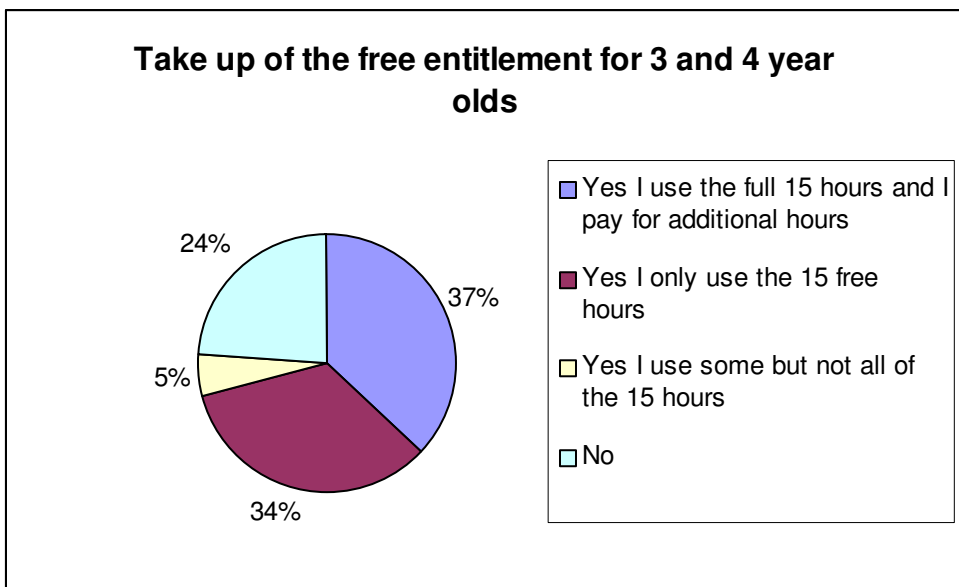
There is also national data from HMRC that shows that it is generally parents with older children that are not claiming the childcare element. Over half of parents with under fives were claiming compared to under 10% of parents with only children over 10. With the recent changes to welfare benefits requiring parents to come off income support once their oldest child is 7, this may explain the recent fall in the take up rate.



Source: HMRC Child and Working Tax Credits Statistics Dec 2010

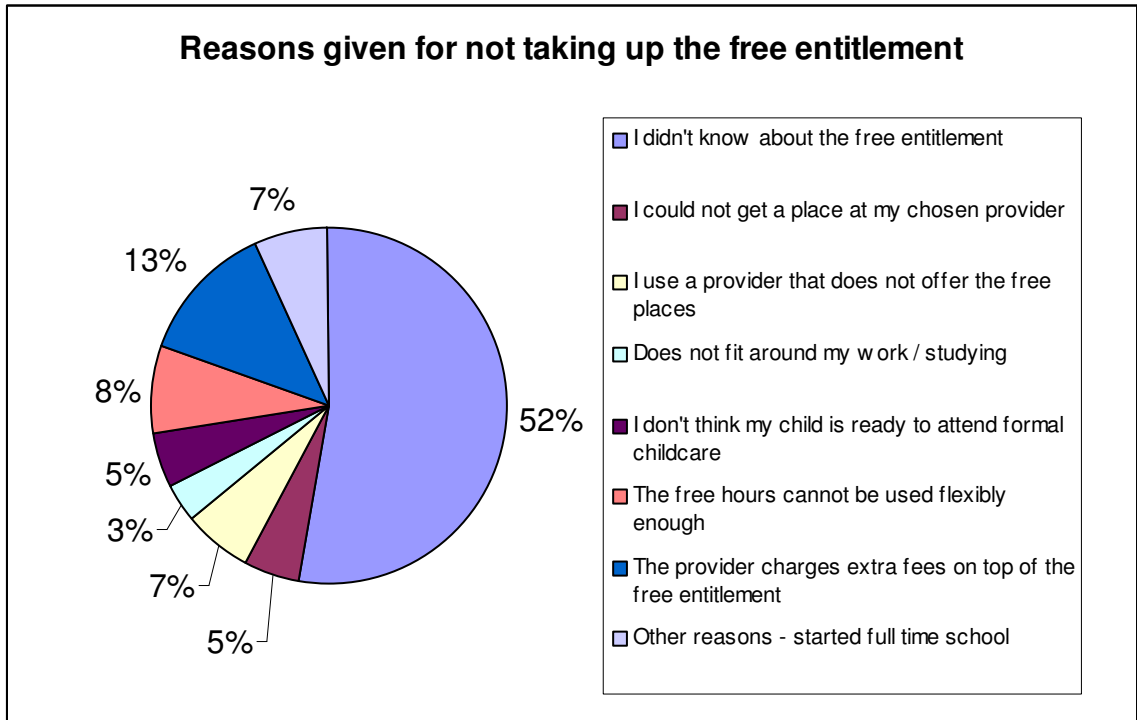
**4.2.4 Take up of the free entitlement to early education for three and four year olds**

Many parents seemed confused about whether they were receiving the free entitlement. There is a lack of awareness of the scheme and how it works which means that some parents do not realise they are accessing the free entitlement. This is likely to be the case for some children attending nursery classes in schools and it is also possible that some parents may not understand the fee structure at providers that charged for some hours and provided others for free.



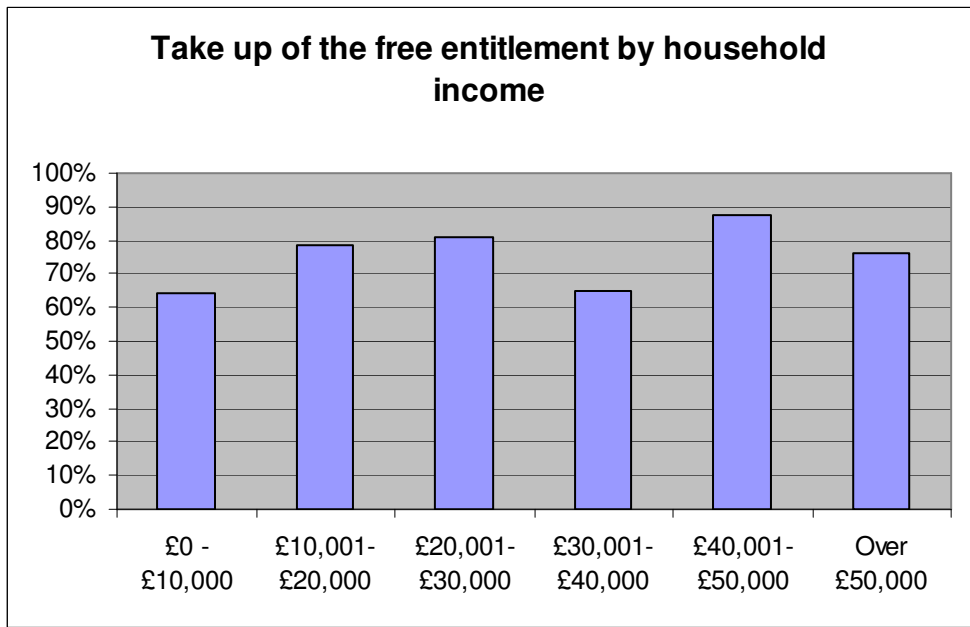
Source: FIS survey of 840 Ealing parents 2010

The main reason given by parents for not using the free entitlement was not knowing about the scheme.



Source: FIS survey of 840 Ealing parents 2010

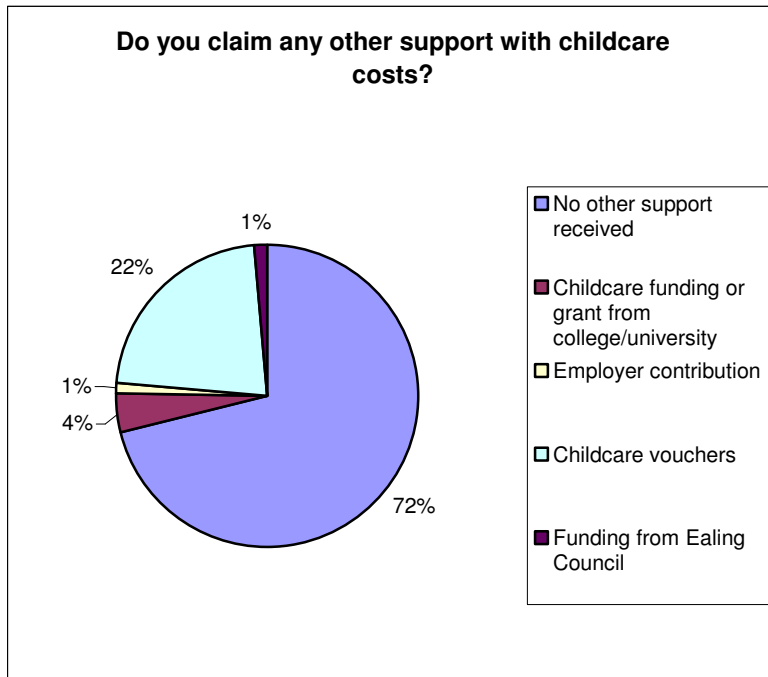
There is evidence nationally that children from lower income families and families from London in general are less likely to use early years provision. The responses to the FIS survey however, did not show any significant difference in take up by income, ethnicity or area.



Source: FIS survey of 840 Ealing parents 2010

#### 4.2.5 Other support with childcare costs

Most parents said they received no other support with childcare costs, although this list did not include the free entitlement to three and four year old funding. Some of the parents may have confused the childcare vouchers with the free entitlement.



Source: FIS survey of 840 Ealing parents 2010

### 4.3 Areas wanted for childcare

#### 4.3.1 Usage of childcare by postcode area

The table below shows for parents using childcare, the postcode of their provision compared to their home postcode.

On average roughly two thirds (67%) of parents use childcare in the same postcode as the area that they live in. 7% of parents use provision outside the borough. W3, W5 and W7 are the most popular areas to travel to and UB5 is the least popular.

Area		Address of childcare provision used								
		W3	W4	W5	UB6	W7	UB5	UB1/UB2	W13	Other
Parents Home Address	W3	79%	3%	7%	1%	1%	0%	0%	0%	10%
	W4	22%	74%	0%	0%	0%	0%	0%	0%	4%
	W5	4%	0%	67%	0%	9%	0%	2%	11%	7%
	UB6	0%	0%	3%	64%	6%	8%	8%	0%	11%
	W7	4%	0%	4%	2%	66%	0%	6%	13%	6%
	UB5	1%	0%	5%	11%	3%	58%	5%	4%	12%
	UB1/UB2	0%	0%	3%	2%	5%	3%	75%	3%	8%
	W13	5%	0%	20%	0%	22%	0%	0%	54%	0%
	Average	14%	10%	14%	10%	14%	9%	12%	11%	7%

Source: FIS survey of 840 Ealing parents 2010

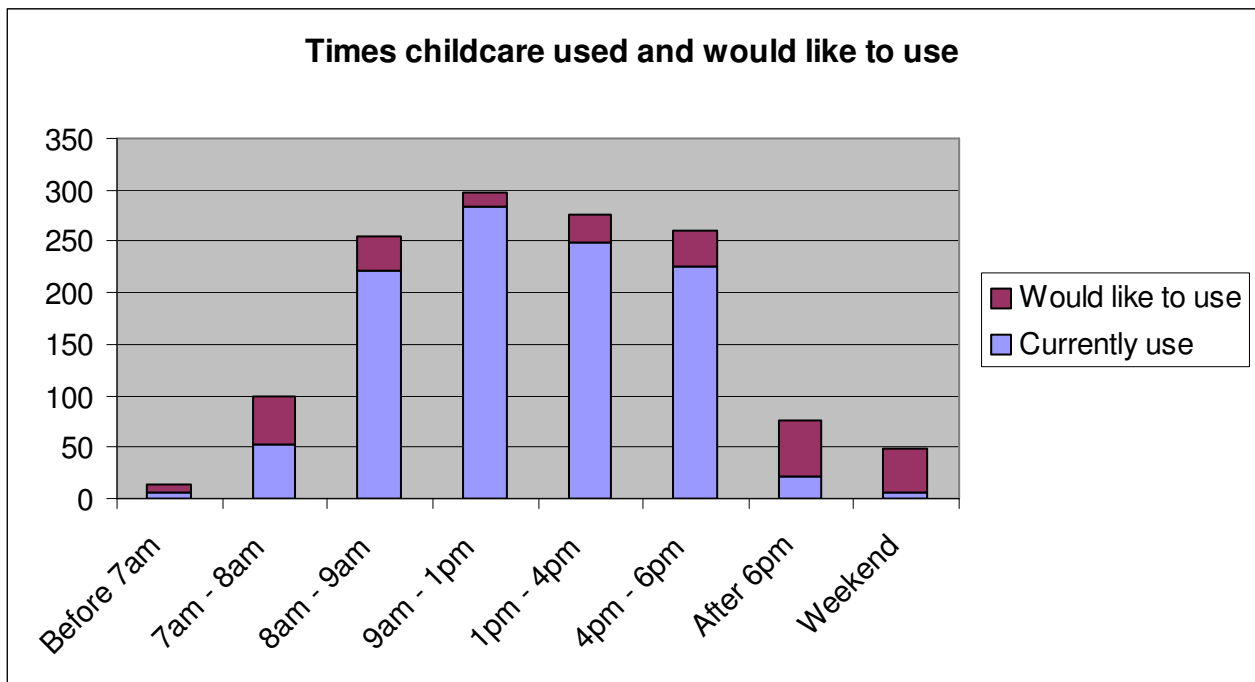
Data from the Department for Education for January 2010 demonstrates that cross border school admissions become more common as the age of the child increases. From this we can infer that the same may be true for childcare. 7.0% of pupils in Ealing primary schools are from outside of the borough compared to 7.6% of Ealing resident children who attend primary schools outside the borough whilst 12.7% of pupils in Ealing secondary schools are from outside of the borough compared to 21.4% of Ealing resident children who attend secondary schools outside the borough.

#### 4.4 Times wanted for childcare

Parents who currently use childcare were asked what times they currently use childcare and what additional times they would like to use it. The tables below demonstrate that most of the demand is within the standard 8-6 hours that are usually offered by childcare providers. The demand for times outside this range is much smaller, but is also much less likely to have been met.

These figures do not include possible demand from people not using childcare who may have different requirements, so these figures should be treated with caution when applying to all parents. Also, saying that you would like something in principle does not guarantee that you would take it up if it were actually offered.

##### 4.4.1 Times of childcare usage



Source: FIS survey of 840 Ealing parents 2010

#### 4.5 Parents of children with a disability or additional needs

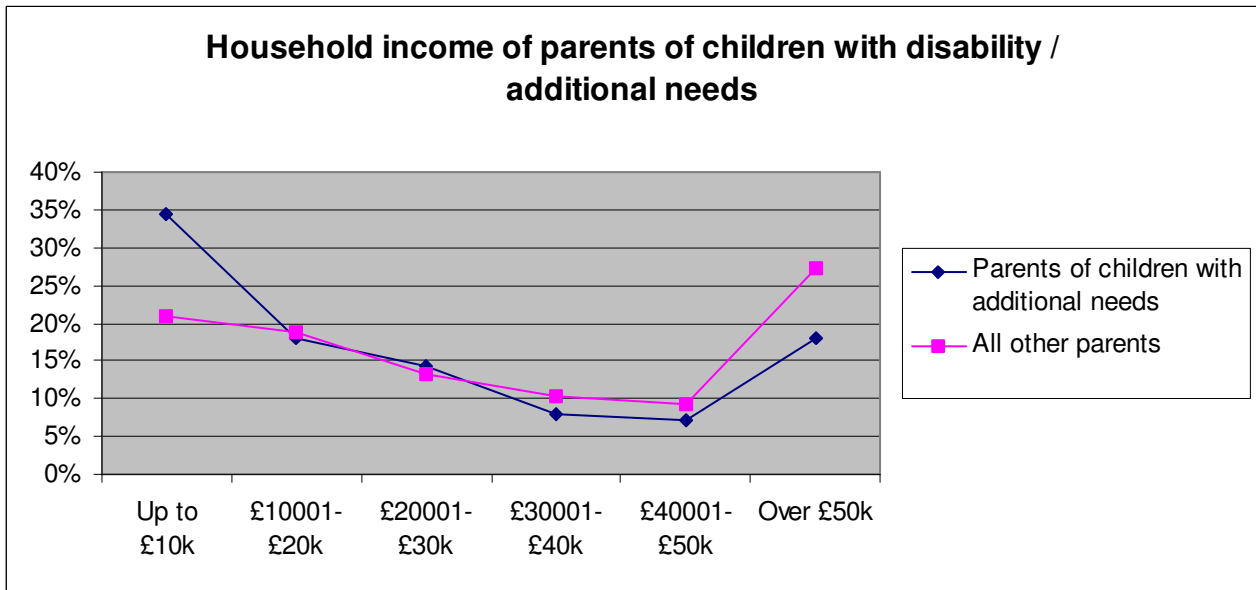
The Ealing Service for Children with Additional Needs (ESCAN) ran a survey in June 2010 to inform the Disabled Children's Strategy 2010-13. Questions relating to childcare were taken from the FIS childcare sufficiency survey so the data could be combined to boost the sample size.

The FIS childcare sufficiency survey had responses from 38 parents of children with additional needs out of the 840 overall responses. This was added to 136 responses to the ESCAN survey to create a sample of 174 parents of children with additional needs. This was then compared against all other respondents to the FIS childcare sufficiency survey.

There were some notable differences between the samples in terms of the ages of children and household income levels. The average age of children in the combined ESCAN/FIS data was nine years compared to four years for the other parents in the FIS data. The reason for this difference may be that the FIS data has children from age zero whereas children often aren't diagnosed with additional needs until they are older. As childcare usage generally falls with the age of the child we would expect that this would have a negative effect on takeup in the ESCAN/FIS data.

#### 4.5.1 Household income comparison

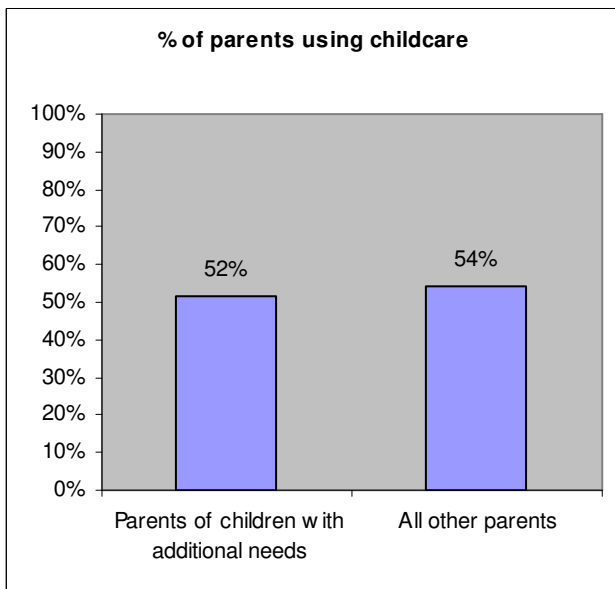
Household income levels were similar, but parents in the ESCAN/FIS data were less likely to be earning over 50k, and much more likely to be earning under 10k. As childcare usage generally rises with income we would expect this to also have a negative impact on take up.



Source: FIS survey of 840 Ealing parents 2010 / ESCAN survey of 136 Ealing parents 2010

#### 4.5.2 Proportion of parents of children with additional needs using childcare

The table below shows the percentage of parents of children with additional needs using some form of formal childcare compared to all other parents. Despite all the factors that would suggest it would be harder for parents of children with additional needs to use childcare, there is almost no difference in the take up rate. However, the parents that took the ESCAN survey were all users of the Short Breaks Service, and this may not be an accurate indicator for the general population of parents of children with additional needs.

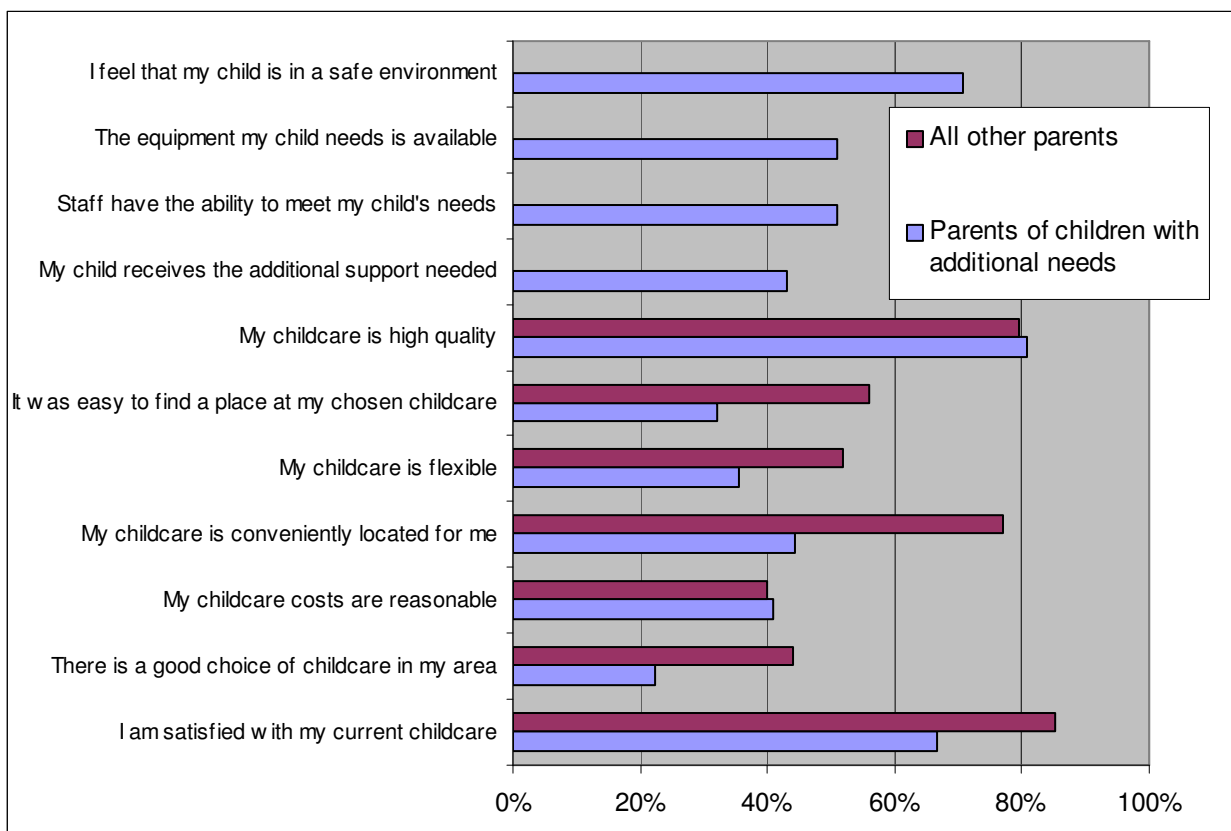


Source: FIS survey of 840 Ealing parents 2010 / ESCAN survey of 136 Ealing parents 2010

### 4.5.3 Childcare users views of their childcare provision

Parents were asked whether they were satisfied with aspects of the childcare they currently use. The table below shows the proportion that agreed or strongly agreed that they were satisfied. Parents in the ESCAN survey were also asked some additional questions specific to their children’s inclusion needs being met. On these there were generally low levels of satisfaction.

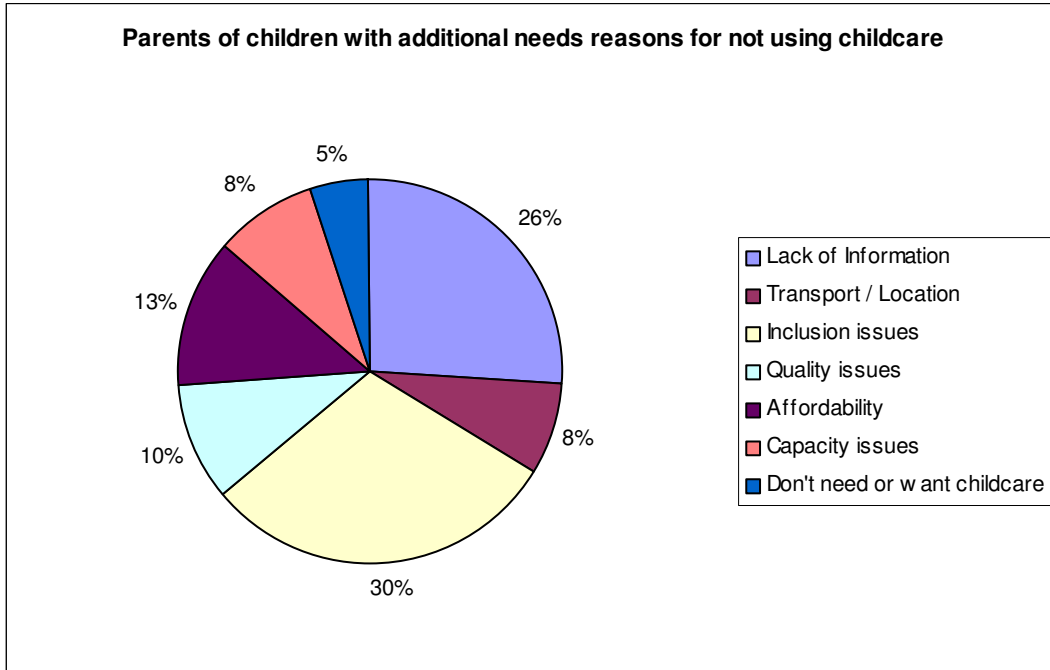
On the more general questions, the ESCAN/FIS data showed equivalent levels of satisfaction to other parents with the quality and cost of childcare. The areas with much lower satisfaction than other parents were for issues around choice and being able to find a place in a convenient location. Additional transport needs could be the cause of some of this dissatisfaction, and there may also be issues with parents of children with additional needs being turned away from some providers, or the parents may be viewing some providers as being unable to meet their child’s needs.



Source: FIS survey of 840 Ealing parents 2010 / ESCAN survey of 136 Ealing parents 2010

#### 4.5.4 Parents reasons for not using childcare

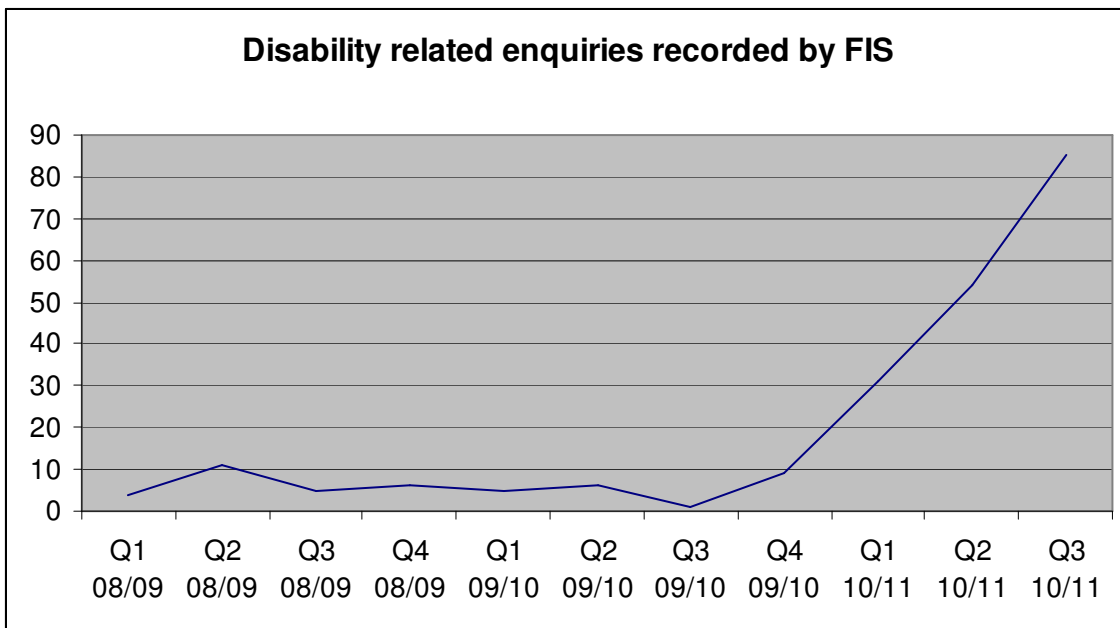
Parents were able to select from a variety of reasons for why they were not using childcare. The ESCAN survey had additional options relating to inclusion needs and these were the most popular choices. The table below demonstrates that lack of information was an important barrier for these parents.



Source: FIS survey of 840 Ealing parents 2010 / ESCAN survey of 136 Ealing parents 2010

The Aiming High for Disabled Children project included funding to improve the information available for parents of children with disabilities. Using this funding, the FIS introduced a new Disability Information Officer post in March 2010. The chart below shows how the number of disability related enquiries recorded by the FIS has increased, suggesting that this demand was not previously being met due to lack of knowledge within the service.

#### 4.5.5 Disability related enquiries



Source: FIS data January 2011

#### **4.6 Government Office for London(GOL) Employer survey**

At the request of the six West London boroughs, GOL commissioned Serco to undertake a survey targeted at employers with a west London presence. 46 employers responded from a wide range of sectors, of which 49% were large enterprises with over 250 staff and 38% were Small and Medium Enterprises (SMEs) with under 50 staff.

- 59% of employers said that they operated shift-patterns with 70% requiring some staff to work before 8am, after 8pm, at weekends or bank holidays
- Cost of childcare (92%) and hours of availability (68%) were cited as the key childcare issues for their workforce, but 73% of employers did not cite childcare as a barrier to recruitment and retention
- The internet (71%) and childcare providers (40%) were the most popular sources of information on childcare providers
- Between 40-45% of employers offered childcare vouchers, salary sacrifice schemes and/or childcare information
- 7% had an on-site nursery or creche facility
- 27% offered no support at all to their employees.

The survey results demonstrated that the larger employers had greater resources to devote to their workforce. The vast majority of large employers have policies and support mechanisms in place to support those with children. Significant numbers of small employers did not have any support in place.

Changes in working practices such as an increase in the number of part-time working opportunities and shift-patterns has meant that employers are able to offer more positions that could be seen as family friendly.

## 5 Childcare provision in Ealing

### 5.1 Childcare places

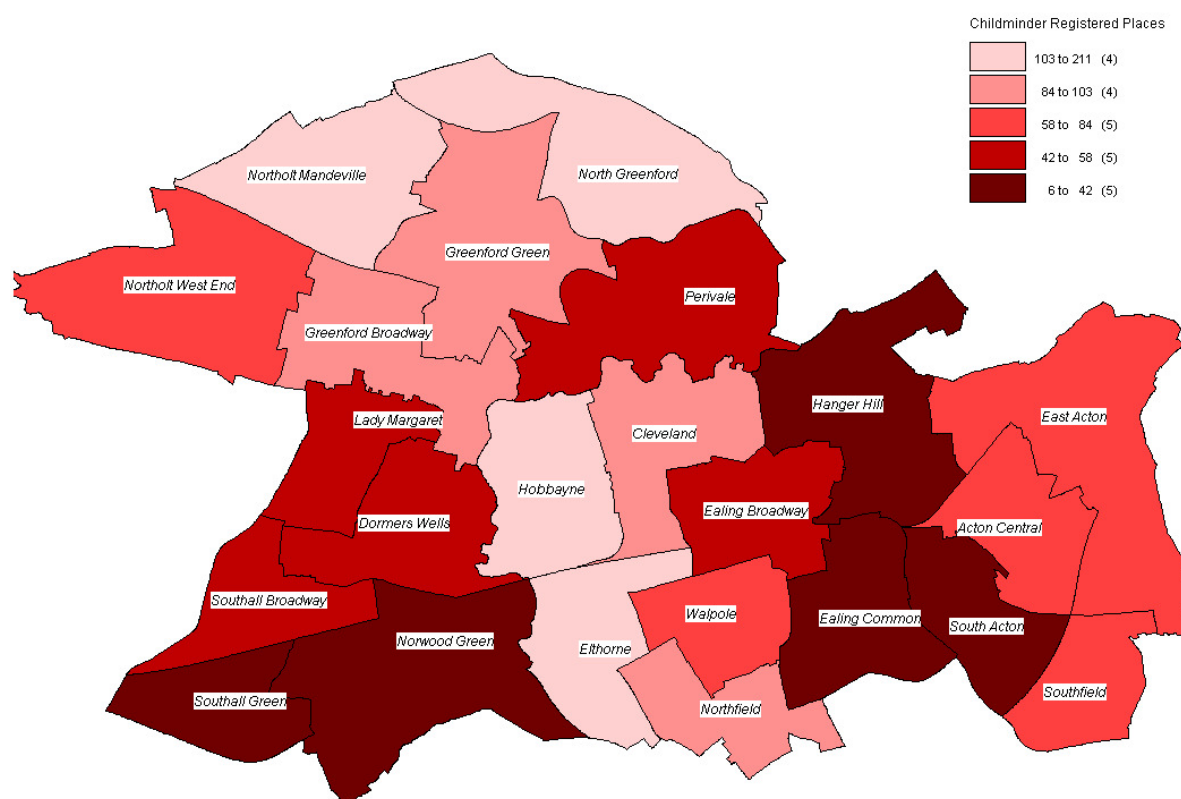
#### 5.1.1 Childminders and Home childcarers

The number of Registered Childminders has fallen. This is a national trend since the requirement for Childminders to offer the Early Years Foundation Stage (EYFS) was introduced in 2008.

	2008 Places	2011 Places	% Change
Childminders	1738	1640	-6%

Source: FIS Data January 2011

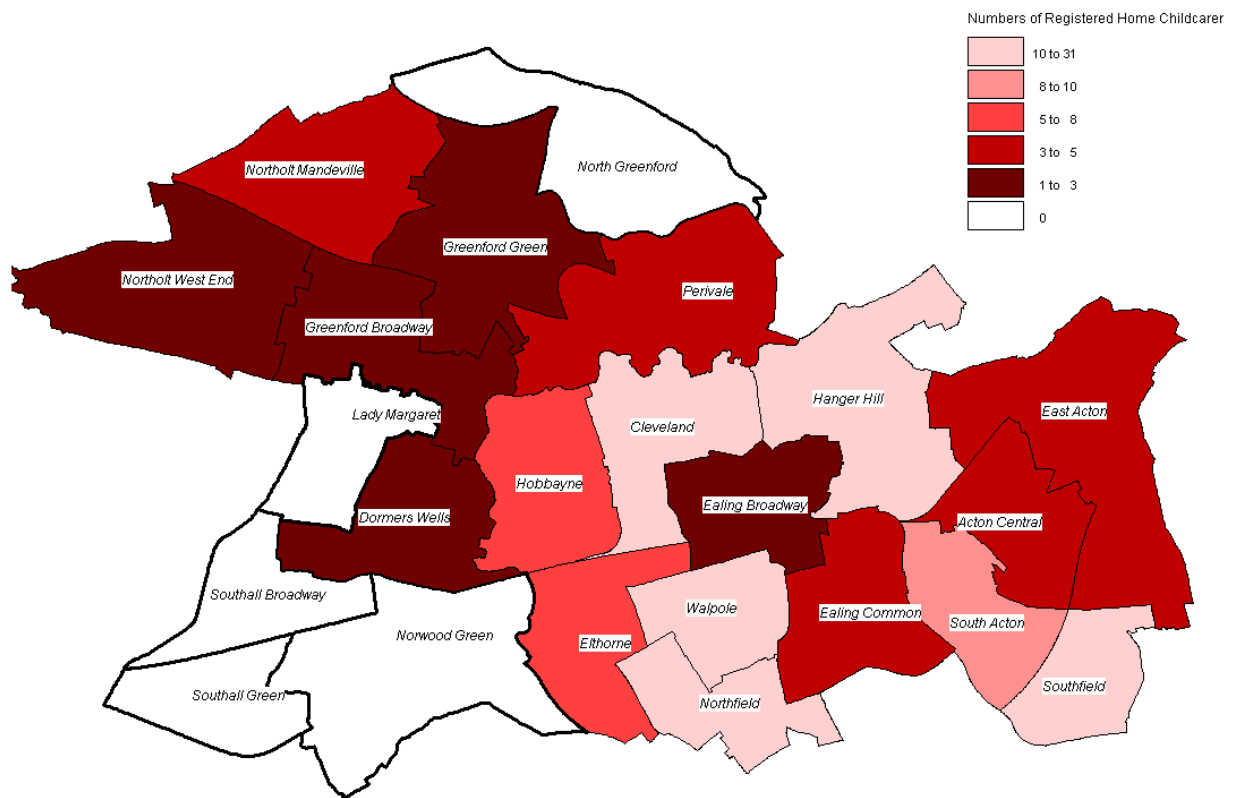
The map below shows the distribution of registered childminder places.



Source: FIS Data January 2011

Since the previous Childcare Sufficiency Assessment (CSA) in 2008, Ofsted have introduced the Voluntary Childcare Register, which allows nannies working in parents own home to register as a Home Childcarer. We now have 140, although because it is a voluntary scheme we do not know how many nannies have chosen not to register.

The map below shows the number of registered home childcarers working in each ward. They are heavily concentrated around Ealing and Chiswick with virtually none in Southall.



Source: FIS Data January 2011

### 5.1.2 Early Years day care provision

The number of places in day nurseries, independent schools and maintained schools offering nursery classes has increased but the number of pre school places has dropped. The FIS does not receive data on how many places are offered in Independent Schools since they are not registered with Ofsted, but there are now 13 offering nursery places compared to 10 in 2008 so there is likely to be an increase in places available. The numbers used for Independent Schools below relate to the number of three and four year olds receiving the free entitlement for the summer term in 2008 and 2010 rather than the overall number of potential places offered.

	2008 Places	2011 Places	% Change
Day Nurseries	3123	3625	+16%
Pre Schools	592	524	-11%
Independent Schools*	310	287	-7%
Maintained Schools	3789	3919	+3%
Total EY places	7814	8355	+7%

Source: FIS Data January 2011

\*Free entitlement attendees summer term 2008 and 2010

There has been an 11% increase in registered childcare places for under fives since 2008. Most of this increase was extra day nursery places in Acton. In Northolt the number of registered places dropped.

### Early years childcare places by area

	Childminder	Day nursery	Pre-School	Total Places	% Change
Acton	254	874	76	1204	+11%
Central Ealing	713	1176	273	2162	+4%
Northolt	510	985	160	1655	-4%
Southall	176	590	15	781	+0%
LBE Total	1653	3625	524	5802	+11%

Source: FIS Data January 2011

Southall is the only area with below the LBE average number of places compared to the population of under fives.

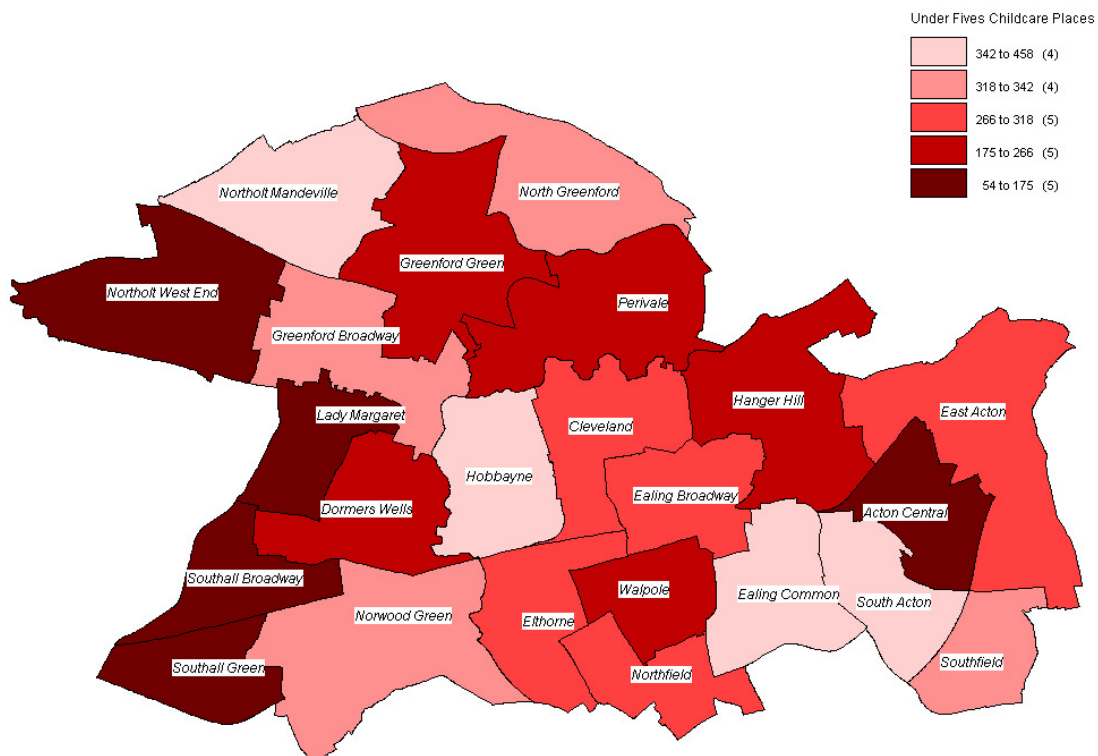
### Early years childcare places compared to population – Under fives

	Places	Population	Places / Population
Acton	1204	4700	26%
Central Ealing	2162	6900	31%
Northolt	1655	6650	25%
Southall	781	6150	13%
LBE Total	5802	24300*	24%

Source: GLA/ Ealing Council, 2009: Central Special Ealing projections, Childcare data from FIS January 2011

\*Figures may not sum due to rounding

The map below shows how the childcare places for under fives are distributed among Ealing wards.



Source: FIS data January 2011

### 5.1.3 Two year old funding

At 1 February 2011 there were 126 two year olds in funded places out of a possible 218 after 75 left the scheme at the end of the previous term in December. 18 have places allocated but had not yet started and a further 30 had been approved for this term but not placed yet. 51 will be finishing at the end of the term in March.

Term	Children funded
Spring 09	1
Summer 09	33
Autumn 09	197
Spring 10	217
Summer 10	198
Autumn 10	176
Spring 11	126*

\*48 more have been approved but not started yet, 51 will leave at the end of term

### 5.1.4 Free entitlement to early education for three and four year olds

#### Three and four year olds accessing EYFS provision

Most three and four year olds are currently accessing the EYFS at school either in reception or nursery classes.

	Pupil Count	%
Maintained Nursery Classes	3474	37%
Maintained Nursery Schools	235	2%
Private Voluntary and Independent nurseries	1806	19%
Full-time 4 year olds (Reception)	3947	42%
Total Pupils*	9426	100%

Source: Schools Data team pupil count data of 3 & 4 year olds summer term 2010 (highest count)

\*Includes pupils resident outside the borough

### 5.1.5 Out of school provision

There has been a large increase in the number of breakfast clubs, although some of this increase could be attributed to the new out of school care development team becoming aware of clubs that were already operating. Many of these clubs are run by the schools themselves and are exempt from Ofsted registration. The number of holiday schemes has also increased, but some of these groups are not actually running yet.

	2008	2011	% Change
After school clubs	58	62	+7%
Breakfast clubs	19	45	+137%
Holiday schemes	41	60	+46%
Total OOS providers	118	167	+42%

Source: FIS Data January 2011

Because many of these groups are exempt from Ofsted registration, the FIS does not have complete data on how many places are available. For exempt provision the median number of places in registered provision has been calculated and used as an estimate.

	Registered Places	Estimated Exempt Places	Total Places
After school clubs	1565	312	1877
Breakfast clubs	678	576	1254
Holiday schemes	1859	480	2339
Total OOS places	4102	1368	5470

Source: FIS Data January 2011

There has been a large increase in out of school childcare places available since 2008 across all areas of the Borough. This is mainly due to the expansion in breakfast clubs. These figures do not include childminders who can also look after children this age and there may be some extra places available for children over eight as these do not count towards the number of registered places.

### Out of school provision by area

	After School Clubs	Breakfast Clubs	Holiday Schemes	Total Places	% Change
Acton	302	281	335	918	+69%
Central Ealing	915	425	1266	2606	+99%
Northolt	489	358	550	1397	+56%
Southall	171	190	188	549	+24%
LBE Total	1877	1254	2339	5470	+71%

Source: FIS Data January 2011

Southall still has below average proportion of places to population compared to the rest of the borough.

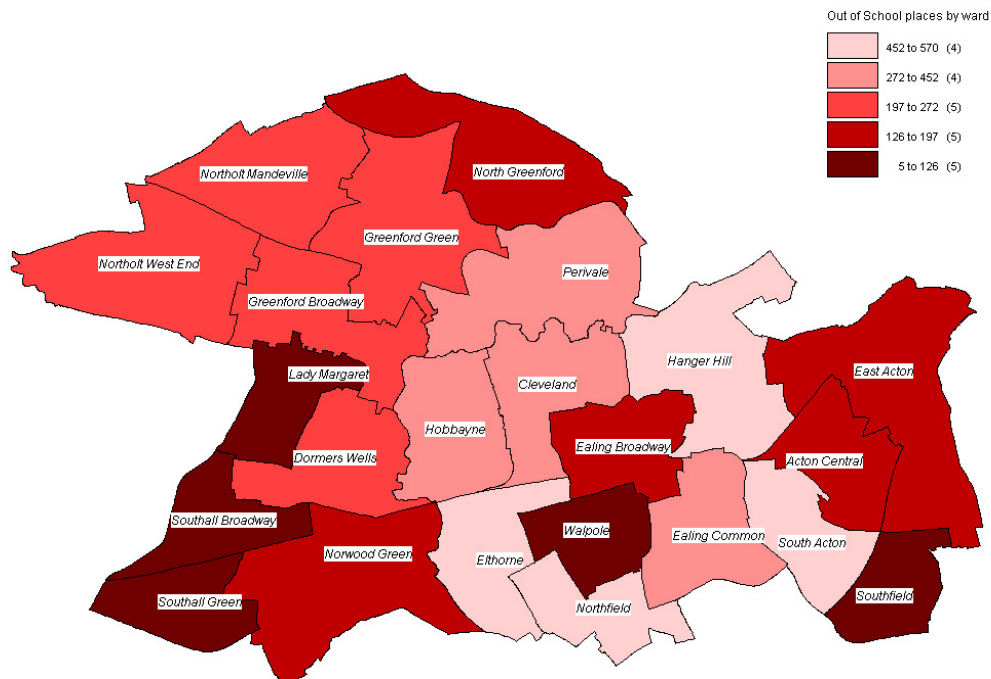
### Out of school childcare places compared to population – School aged children 5 - 14

	Places	Population	% Places
Acton	918	6300	15%
Central Ealing	2606	12500	21%
Northolt	1397	10500	13%
Southall	549	8350	7%
LBE Total	5470	38500*	14%

Source: GLA/ Ealing Council, 2009: Central Special Ealing projections, Childcare data from FIS January 2011

\*Figures may not sum due to rounding

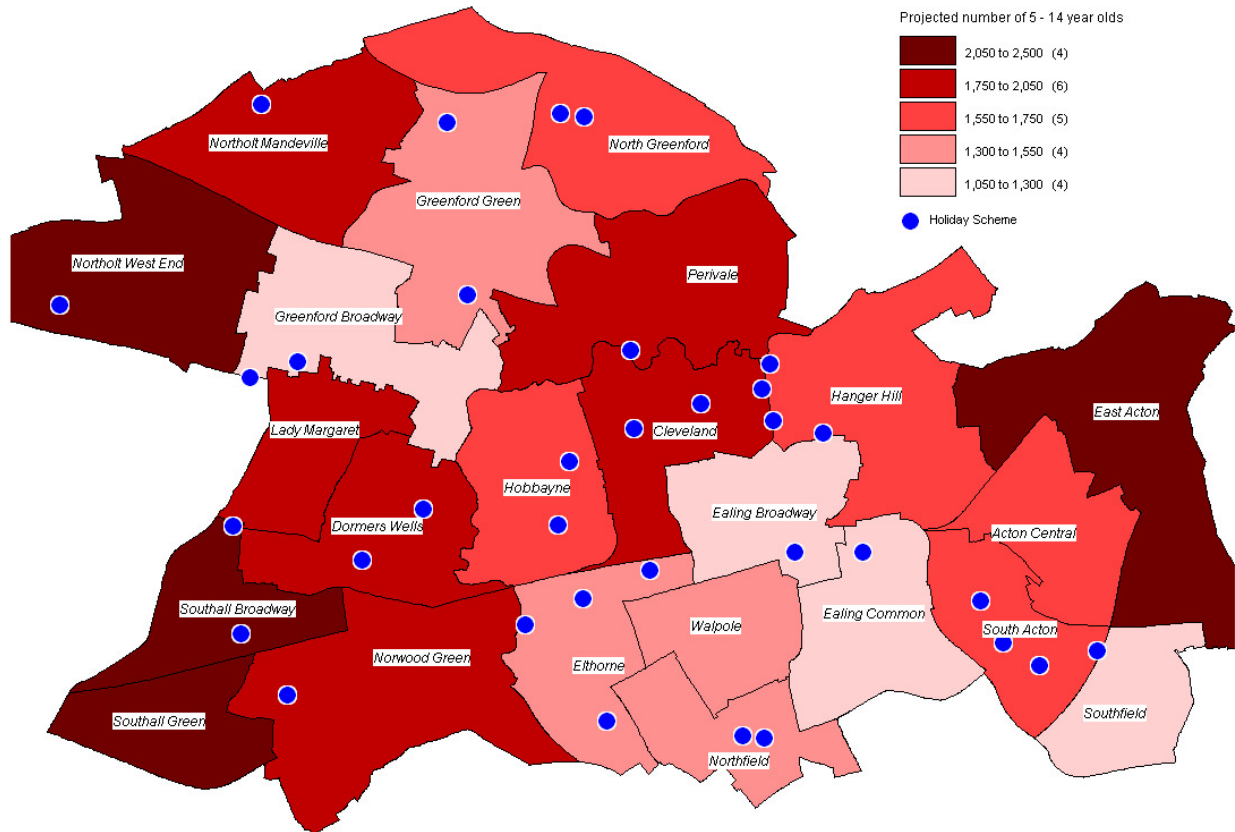
The map below shows how the childcare places for school aged children are distributed among Ealing wards.



Source: FIS data January 2011

## Holiday Schemes

Many of the holiday schemes that are registered with Ofsted do not run for every single holiday as there are often issues with acquiring suitable seasonal staff or providers don't believe there is sufficient demand at the time. To get a better idea of the coverage across the borough, the map below shows the number of holiday schemes that ran during the summer holidays in 2010, compared to the projected population of 5 – 14 year olds.



Source: GLA/ Ealing Council, 2009: Central Special Ealing projections, Childcare data from FIS January 2011

The map shows that only 34 schemes actually ran during the summer holiday. Ealing has a generally high level of schemes compared to the population. The other areas are more thinly spread. Acton has a cluster of provision in South Acton but nothing in the other wards, particularly East Acton where there is a high population.

The CHIPs pilot found that there was a lack of suitable and affordable premises for providers to operate from. Part of the problem was a reluctance from schools and other community venues to allow providers to operate on their sites. Often there was pressure to charge commercial levels of rent rather than considering the benefits to child development and of supporting local parents back into work. There is also a misconception that childcare providers make large profits from these schemes.

### 5.1.6 Out of School Care Commissioning

Ealing has developed a commissioning panel to consider applications for funding from the out of school care sector. The funding is to improve quality, expand provision or support new provision being opened and where providers are having short term sustainability issues. £10,000 was awarded for Easter and summer holiday childcare provision through process lead by the Ealing's Grants section.

	Awards	Spent
Quality	41	£17,746
Expansion	0	£0.00
New Places	16	£43,872.00
Sustainability	3	£13,367.16
Inclusion	114	£57,448.27
Holiday Fund	-	£10,000
Total	174	£142,434.20

### 5.1.7 Creche Commissioning

To support parents in being able to undertake ESOL, parenting and basic skills courses, £72,596.53 was allocated through the commissioning panel for one off crèche provision linked to 60 courses in Ealing Children's Centres and Schools.

## 5.2 Childcare costs

### 5.2.1 Day nursery prices

Average weekly costs for day nurseries have risen by 15% in Ealing since the last CSA with big increases in the Central Ealing area. The prices for the borough remain below average for London but are generally still a long way above £175, which is the maximum amount that the childcare element of working tax credit will pay towards for one child.

	Average Weekly Price 2008		Average Weekly Price 2011	
	Under twos	Over twos	Under twos	Over twos
Acton	£209	£183	£227 (+9%)	£202 (+10%)
Central Ealing	£218	£162	£264 (+21%)	£193 (+19%)
Northolt	£181	£148	£199 (+10%)	£168 (+14%)
Southall	£171	£140	£185 (+8%)	£153 (+10%)
LBE	£195	£158	£225 (+15%)	£182 (+15%)
London*	£202	£186	£238 (+18%)	£226 (+22%)

Source: FIS data January 2011

\*Average figures from Daycare Trust childcare costs surveys 2008 and 2011

### 5.2.2 Childminder prices

There have been large increases in hourly rates charged by childminders across all areas. There is a very wide range of prices charged with some childminders offering places for £3 an hour going up to £8 an hour for the most expensive. For a full time place that would equal £400 a week. Prices remain lower than average in Southall and Northolt.

	Average Hourly Price 2008	Average Hourly Price 2011
Acton	£4.85	£5.79 (+19%)
Central Ealing	£4.51	£5.29 (+17%)
Northolt	£3.75	£4.45 (+19%)
Southall	£3.72	£4.62 (+24%)
LBE	£4.18	£4.99 (+19%)
London*	£3.40	£4.64 (+36%)

Source: FIS data January 2011

\*Average figures from Daycare Trust childcare costs surveys 2008 and 2011

### 5.2.3 After School club prices

	Average Weekly Price 2008	Average Weekly Price 2011
Acton	£31	£29 (-6%)
Central Ealing	£41	£43 (+5%)
Northolt	£36	£39 (+8%)
Southall	£33	£35 (+6%)
LBE	£36	£38 (+6%)
London*	£47	£43 (-9%)

Source: FIS data January 2011

\*Average figures from Daycare Trust childcare costs surveys 2008 and 2011

### 5.2.4 Holiday scheme prices

Overall since 2008 there has been a small drop in the average weekly price for school holiday childcare to £95 a week for a full time place. The five schemes across the borough ran by the Council's Play Service continue to charge £65 a week, whereas the same place in the PVI sector costs an average of £110.

	Average Weekly Price 2008	Average Weekly Price 2011
Acton	£73	£82 (+12%)
Central Ealing	£121	£110 (-9%)
Northolt	£86	£86
Southall	£65	£65
LBE	£98	£95 <sup>i</sup> (-3%)
London*	£92	£88 <sup>ii</sup> (-4%)

Source: FIS data January 2011

\*Average figures from Daycare Trust holiday childcare costs surveys 2008 and 2010

<sup>i</sup> £65 (LA) or £110 (PVI)

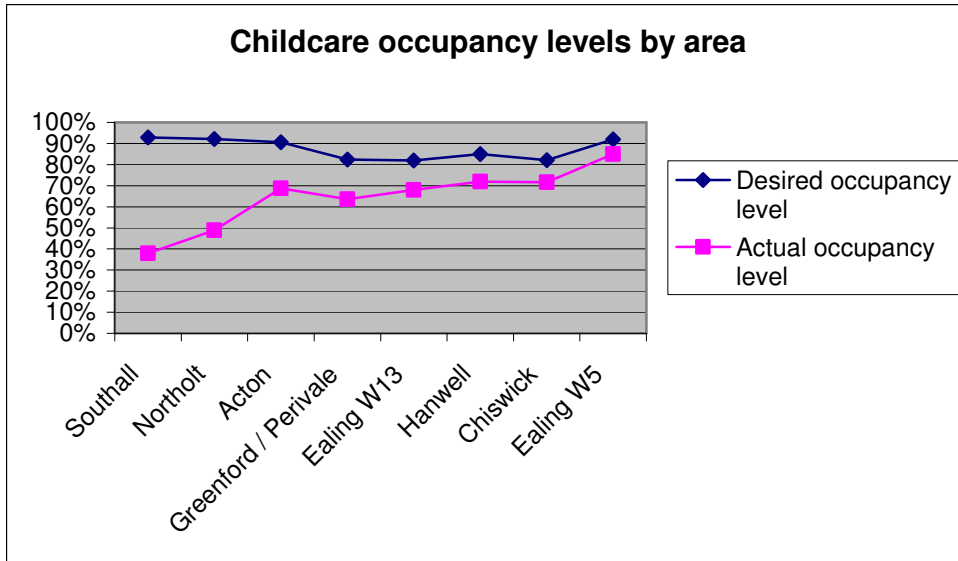
<sup>ii</sup> £74(LA) or £102 (PVI)

### 5.3 Occupancy / Vacancy levels

#### 5.3.1 Occupancy levels by area

Childcare providers often do not take as many children as they are registered for as they may prefer to work with smaller numbers or the required staff ratios may make it costly to fill their full number of places. For this reason, providers in the FIS survey were asked what their desired level of occupancy was as well as their actual level.

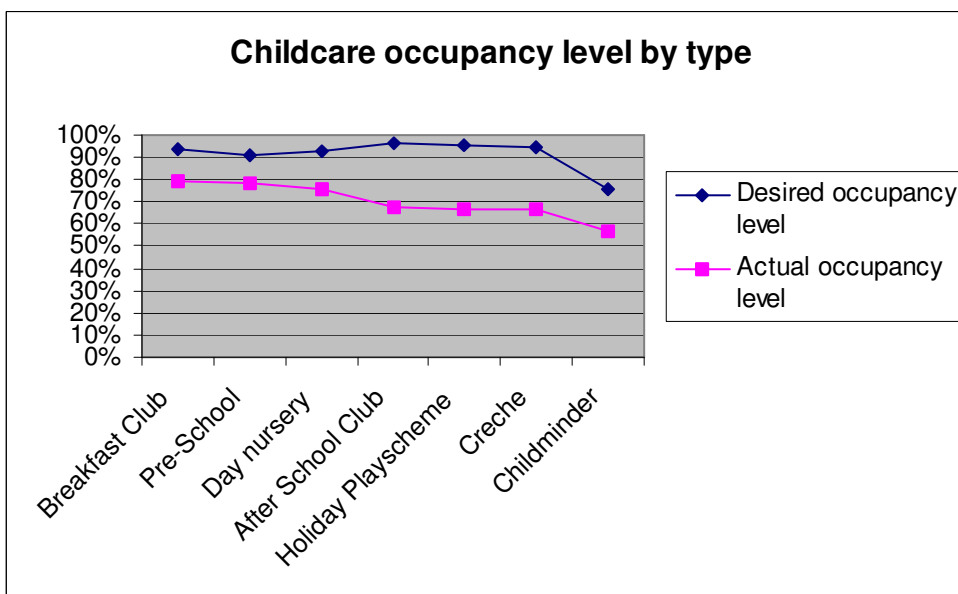
Childcare provision in Southall and Northolt reported lower levels of occupancy than the other areas of the borough. Provision in the W5 area is close to being full.



Source: FIS survey of 149 Ealing Childcare providers 2010

#### 5.3.2 Occupancy levels by type of childcare

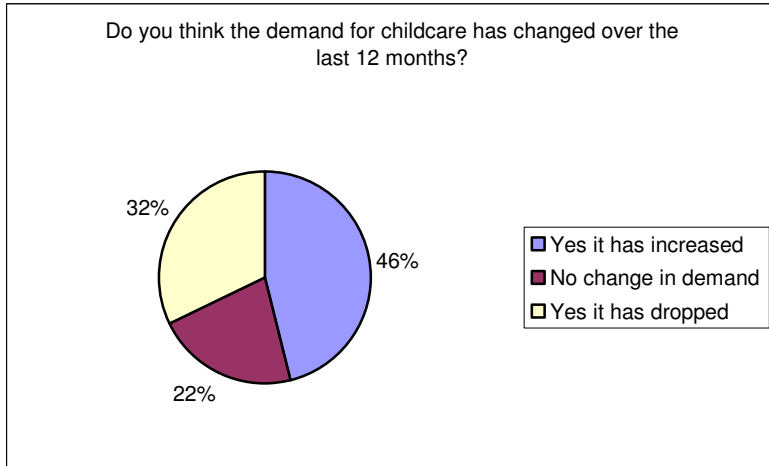
Childminders are choosing not to take the full number of children they are registered to look after. This means there may be a lot less places available with childminders than the number they are registered for. After school clubs and holiday schemes reported the highest spare capacity.



Source: FIS survey of 149 Ealing Childcare providers 2010

### 5.3.3 Childcare providers view of demand levels

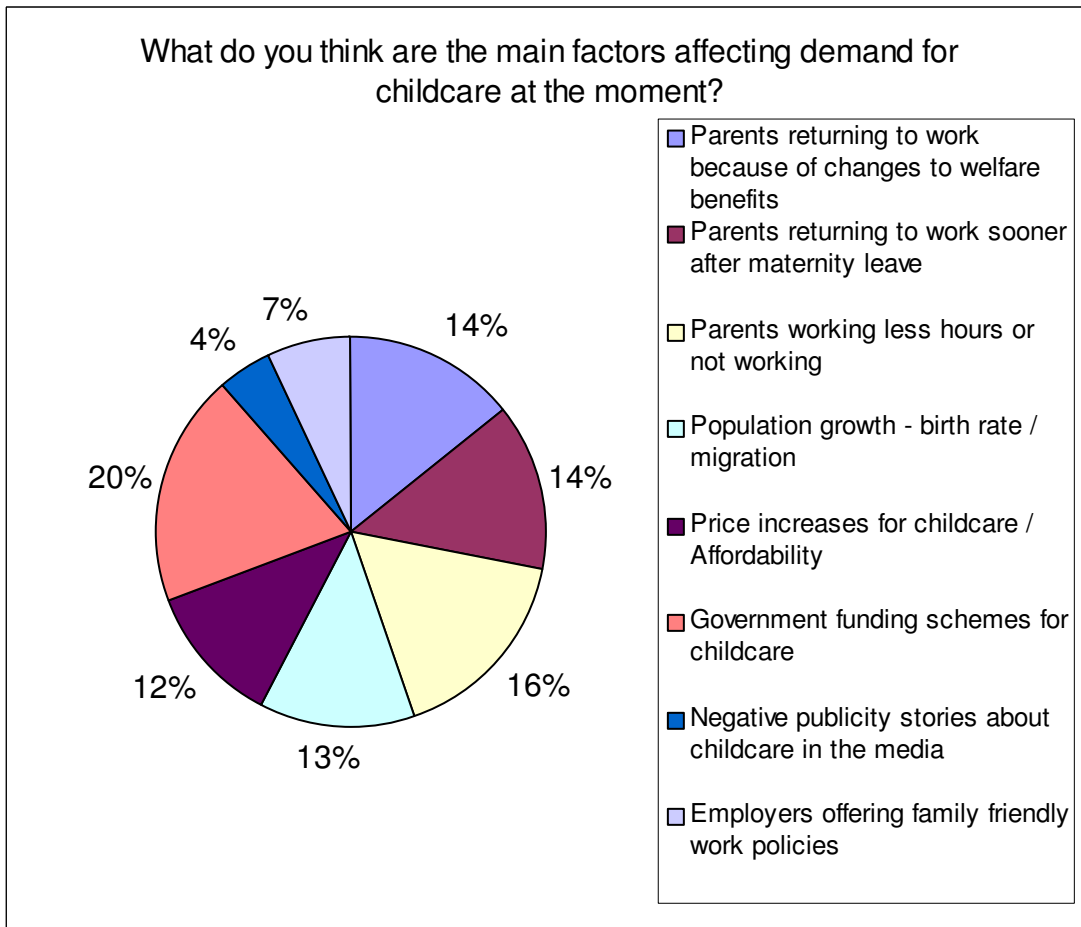
More childcare providers believe demand has increased rather than dropped in the last year.



Source: FIS survey of 149 Ealing Childcare providers 2010

### 5.3.4 Factors affecting demand for childcare

The largest factor affecting demand was government funding schemes for childcare, but there were a wide range of factors both positive and negative.

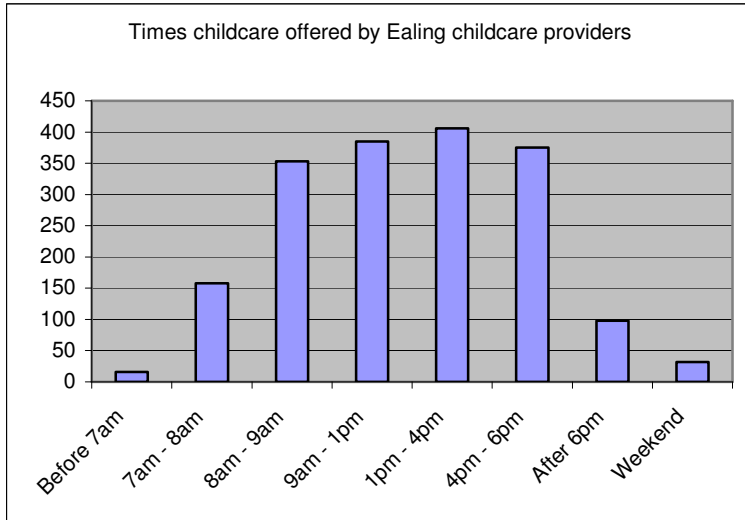


Source: FIS survey of 149 Ealing Childcare providers 2010

## 5.4 Childcare opening times

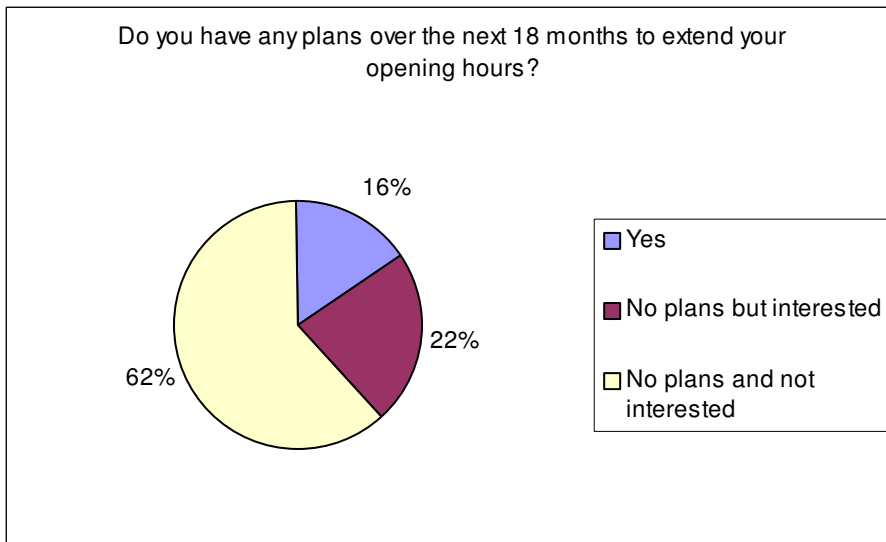
The FIS holds information on the opening times of childcare providers in the borough. The table below shows how many childcare providers are open for each time period. The majority of provision is open within the standard 8-6 hour day.

### 5.4.1 Opening times offered



Source: FIS data January 2011

Most childcare providers had no plans to extend their opening hours, so large changes in times available are unlikely.



Source: FIS survey of 149 Ealing Childcare providers 2010

### 5.4.2 Free entitlement flexibility

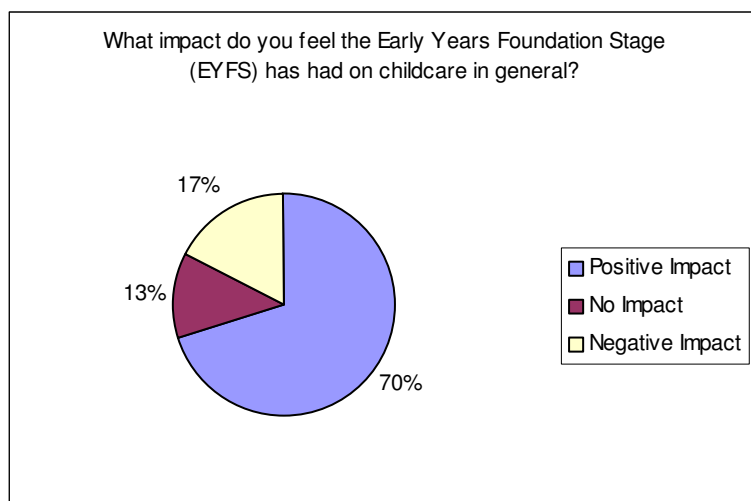
Since September 2010, all local authorities are required to ensure that there is sufficient flexibility in the way the free entitlement is offered, to meet the needs of local parents. 45 childcare providers out of 122 PVI settings receiving the free entitlement are offering flexibility. Flexibility in this context means outside the usual three hours a day, five days a week model. The table below shows what flexible options are currently being offered in Ealing.

	<b>Settings Offering</b>
Three x five hour sessions a week	35
Two x six hours and one x three hours	15
11 hours per week over 51 weeks	11
Other flexible delivery models	3

Source: FIS data January 2011

### 5.5 Quality

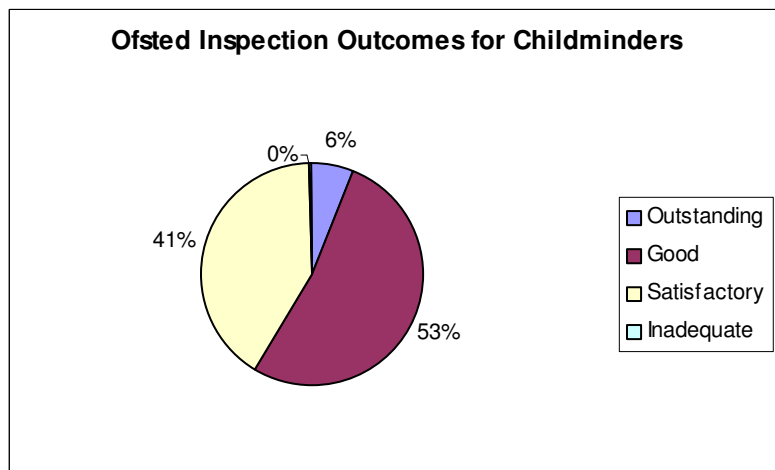
The chart below demonstrates that childcare providers in London believe the introduction of the Early Years Foundation Stage (EYFS) in 2008 has improved the quality of care.



Source: Daycare Trust survey 2010 representing 570+ London childcare providers

#### 5.5.1 Childminder Inspection Results

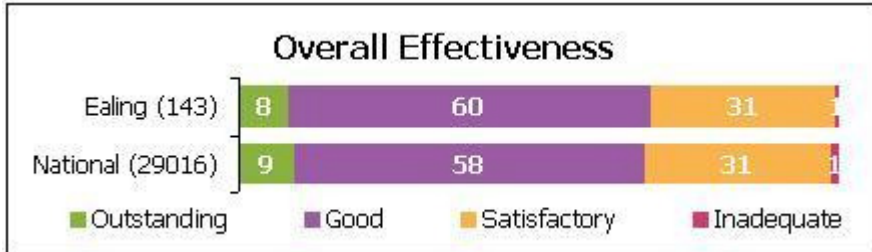
This chart shows the results of all Ofsted inspections for registered childminders currently operating in the Borough of Ealing.



Source: FIS data January 2011

### 5.5.2 Childminder Ofsted Inspections since 2008

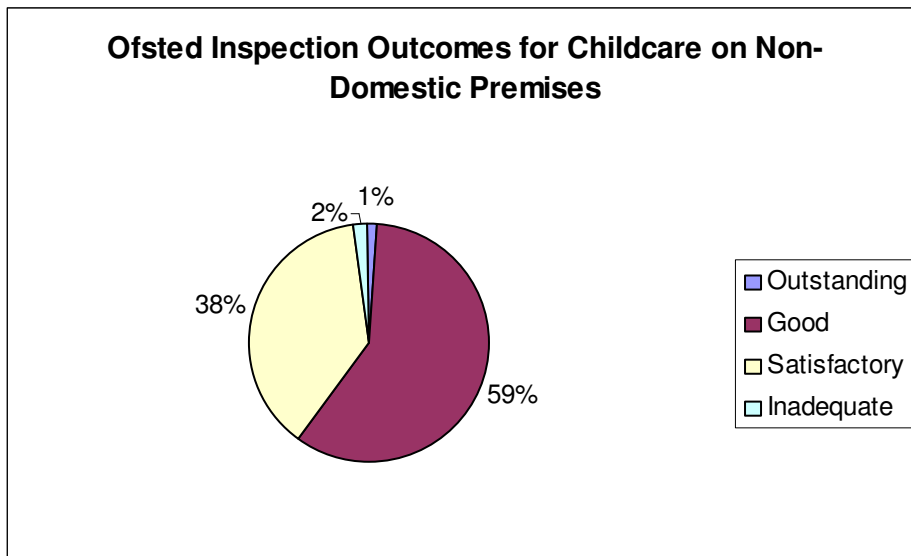
The chart below shows the results of Ofsted inspections since the introduction of the EYFS in September 2008. The results show an improvement compared to inspections from pre-2008 and are in line with the national averages for childminders.



Source: Ofsted EY Inspection Outcomes End of Dec 2010

### 5.5.3 Childcare on Non-Domestic Premises Inspections results

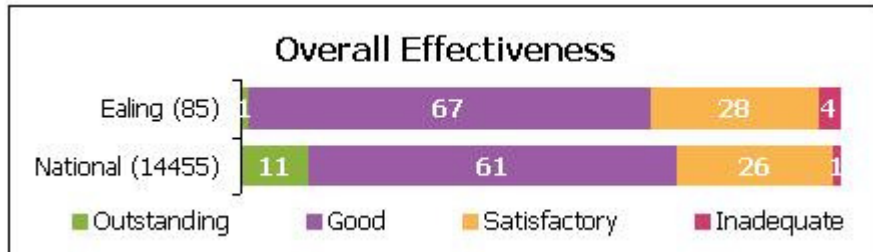
The chart below shows the results for childcare on non-domestic premises in Ealing. These premises can range from converted houses to purpose built nurseries or Children's Centres as well as some childcare operating on school premises. The inspection results for childcare on non-domestic premises are similar to the childminders results but with fewer outstanding and satisfactory provision and more good provision.



Source: FIS data January 2011

### 5.5.4 Childcare on Non-Domestic Premises Inspections since 2008

The chart below shows that the more recent inspection results since 2008 have generally seen more good outcomes, but unfortunately there has also been an increase in settings graded as inadequate. There is much less outstanding provision in Ealing than compared to the national figures.



Source: Ofsted EY Inspection Outcomes End of Dec 2010

### 5.5.5 Places available for the two year old funding

To be able to take children for the two year old funding, childcare provision has to meet certain quality criteria which restricts the number of places available that we can actually use to place children. This is to ensure that the children identified receive the benefits of good quality childcare. Nurseries participating in the scheme must have a good Ofsted rating or not be receiving a high level of support from Ealing’s Early Years Consultants. There is also a restriction on the number of children one setting can take to ensure that the setting does not become overly reliant on one funding stream and therefore unsustainable. They would then need to have an actual vacancy available.

The table below shows how many children are funded in each area and how many places are potentially available that meet the quality criteria as of Feb 1.

	Funded	Potential Places
Acton	24	11
Chiswick	0	0
Ealing	22	12
Greenford	11	12
Hanwell	12	1
Northolt	27	12
Perivale	2	8
Southall	28	39
LBE	126	95

There are a high number of places available in Southall, but other areas may not be able to accommodate the number of children we are currently able to fund. If the birth rate continues to rise, this could make the problem worse, particularly if there was also an increase in parental employment.

Filling all the places may require an increase in the number of high quality childcare settings either through new settings starting up or by improvements to current settings that do not meet the criteria. There are currently 37 childcare providers that do not meet the criteria and 33 that do meet the criteria but cannot take any more two year olds.

### 5.5.6 Training for childcare providers

The Early Years Training Team offer training grants through the Graduate Leader Fund and Individual training Grants to help childcare providers improve their staff qualifications. They also provide short courses through the Early Years Training Programme. The table below shows the amount of funding awarded to Ealing childcare providers since 2008.

	08/09	09/10	10/11
Training Programme	£70,000	£59,897	£68,242
Graduate Leader Fund	£57,328	£107,765	£242,815
Individual Training Grants	£62,805	£200,519	£191,296
Total EY training spend	£190,123	£368,181	£502,353

### Early Years Professional Status (EYPS)

Early Years Professional Status is designed to ensure that all under fives childcare settings have a qualified early years graduate leading practice. Ealing has so far funded 21 childcare workers towards getting a foundation degree, 10 now have the degree and are working towards EYPS and 17 have achieved EYPS.

## 5.6 Inclusion

### 5.6.1 Inclusion grant funding

The out of school care commissioning grants for Inclusion pay for equipment or personal assistants for children who require extra support to be able to access out of school settings. The table below shows the numbers of awards and the total spend for each year. The increase in the number of awards possibly shows a demand for places that was previously not being met because of inclusion issues.

	08/09	09/10	10/11
Awards	19	82	102*
Funding	£12,883	£40,146.09	£56,598.27*

\*Projected. Current figures are 95 awards at a cost of £48,981.57

### 5.6.2 Children In Need Panel Placements

The Children In Need Panel funds places in Children's Centres to children with additional needs. The number of placements has been rising as more children's centres have opened and more funding has been made available.

#### Average number of children funded per month

Q1 09/10	Q2 09/10	Q3 09/10	Q4 09/10	Q1 10/11	Q2 10/11
60	66	65	75	82	81

A large proportion of the children are placed in Southall, but with new centres opening there are also large numbers in Acton and Northolt.

#### Average number of children funded per month by area

	2009/10	2010/11
Acton	12	19
Central Ealing	7	8
Northolt	13	20
Southall	34	35

Some families have had to wait for very long times before places became available due to the shortage of Children's Centre places and restrictions on numbers of children to be placed in individual centres to ensure that the centres aren't relying too heavily on one source of funding.

### Average waiting times for a place after CIN panel approval

	Funded	Ave. days on waiting list
Acton	113	173
Central Ealing	33	105
Northolt	161	274
Southall	139	115
LBE	446	190

Despite the increase in children placed there are almost the same number of children on the waiting list as the number currently placed. This suggests the panel would need almost double the current funding to place all the children requiring places. There would also need to be a similar expansion in the number of suitable settings with the facilities and skills to cater for the children's needs.

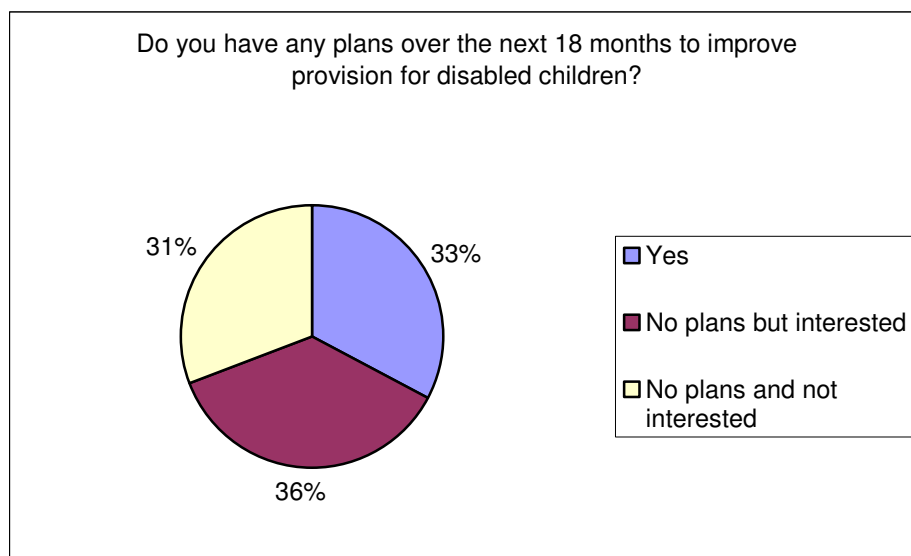
### Current children on CIN waiting list

	Approved	Ave. days on waiting list
Acton	27	180
Central Ealing	1	364
Northolt	29	96
Southall	14	84
LBE	71	130

### 5.6.3 Plans to improve provision for disabled children

Childcare providers were asked whether they had plans to improve their provision for disabled children. The table below shows the results. Roughly a third of providers had already identified a need to improve their provision and had plans to do this. A third did not plan to improve provision, this could be because they already believe they are meeting the needs of disabled children, or they may believe that they will not be able to meet any additional needs with their provision. Providers have to be prepared to make "reasonable adjustment" in order to take children with additional needs to comply with the Disability Discrimination Act.

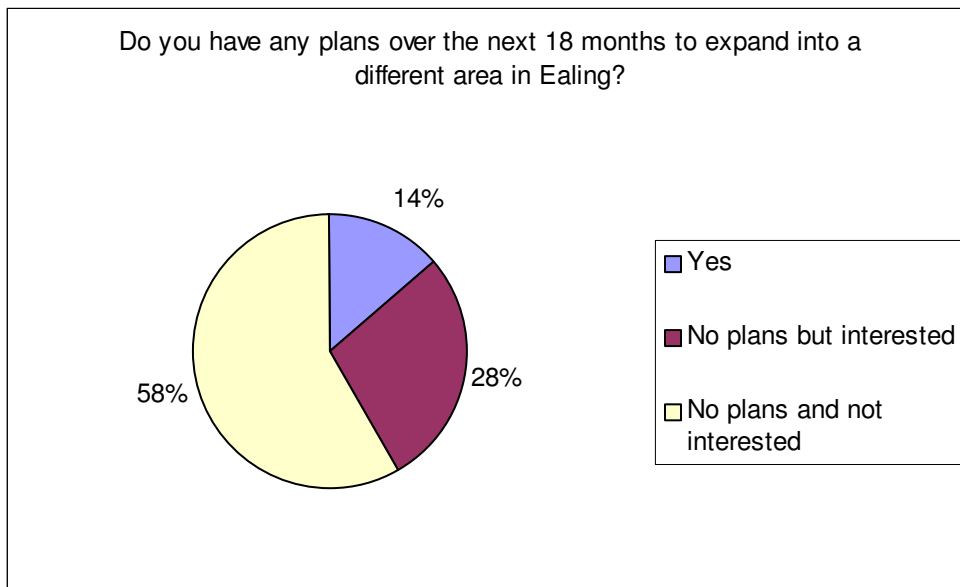
The final third of respondents said they had no plans to improve their provision but would be interested. These providers probably need more support to identify how they could improve and to put plans in place to do this.



Source: FIS survey of 149 Ealing childcare providers 2010

### 5.7 Plans for expansion / sustainability

Most providers have no plans to expand and open new provision, however, if 14% of Ealing's childcare providers did open new provision it would be a massive increase in places.

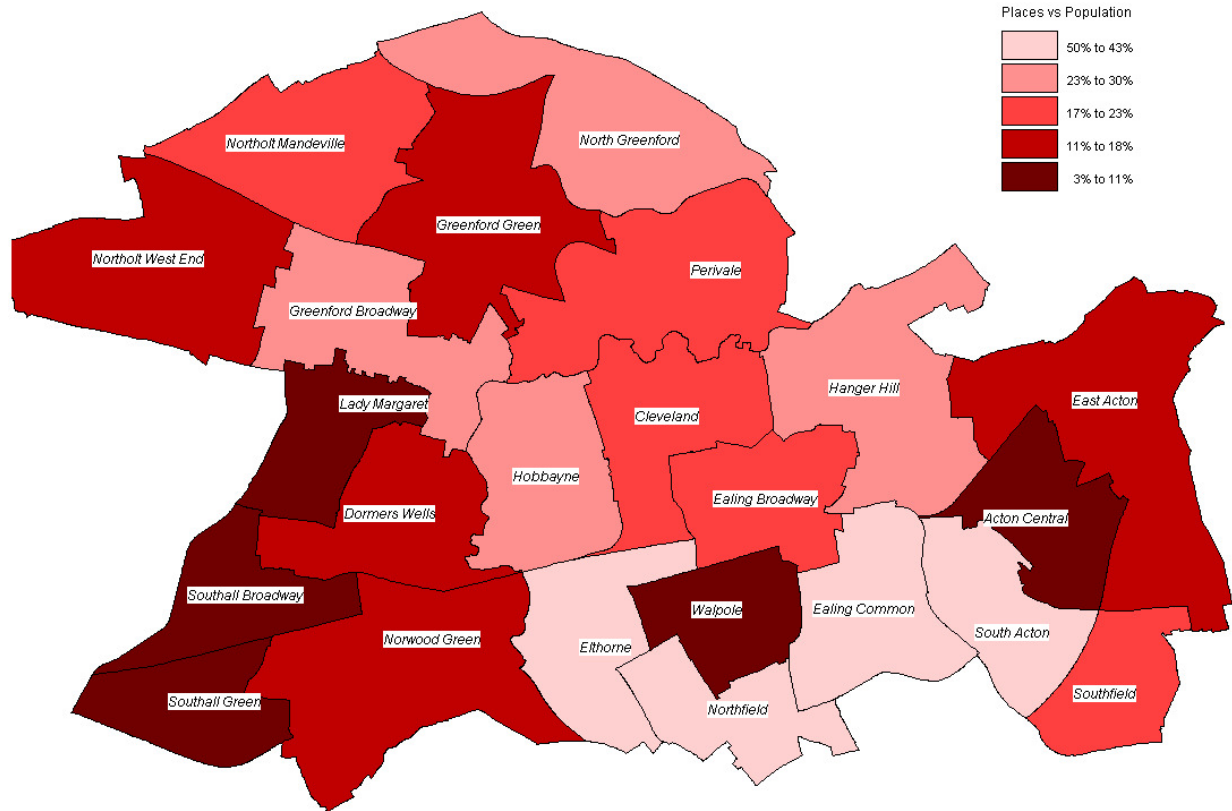


Source: FIS survey of 149 Ealing childcare providers 2010

## 6 Are there gaps in Ealing’s childcare provision?

### 6.1 Geographical gaps – general shortage of childcare

The map below shows the proportion of childcare places compared to children 0 -14 by ward.



Source: FIS data January 2010 and GLA/ Ealing Council, 2009 Central Special Ealing projections

	Places	0 – 14 population	Places / Population
Acton	2122	11550	18%
Central Ealing	4768	18450	26%
Northolt	3052	16250	19%
Southall	1330	15800	8%
LBE	11272	62800*	18%

Source: FIS data January 2010 and GLA/ Ealing Council, 2009 Central Special Ealing projections

\*Figures may not sum due to rounding

Southall was the only area with below average numbers of childcare places compared to the population, which may appear to be a shortage of places. However, if you also compare the occupancy levels reported by childcare settings, Southall stands out as having more vacancies than the rest of the borough which suggests that the demand for childcare in this area is still too low to support the current level of provision.

	<b>Under fives places</b>	<b>Over fives places</b>	<b>Occupancy rate</b>	<b>Estimated Places Used</b>
Acton	1204	918	69%	1464
Central Ealing	2162	2606	75%	3576
Northolt	1655	1397	58%	1770
Southall	781	549	38%	505
LBE	5802	5470	64%	7214

Source: FIS data January 2010 and survey of 149 Ealing childcare providers 2010

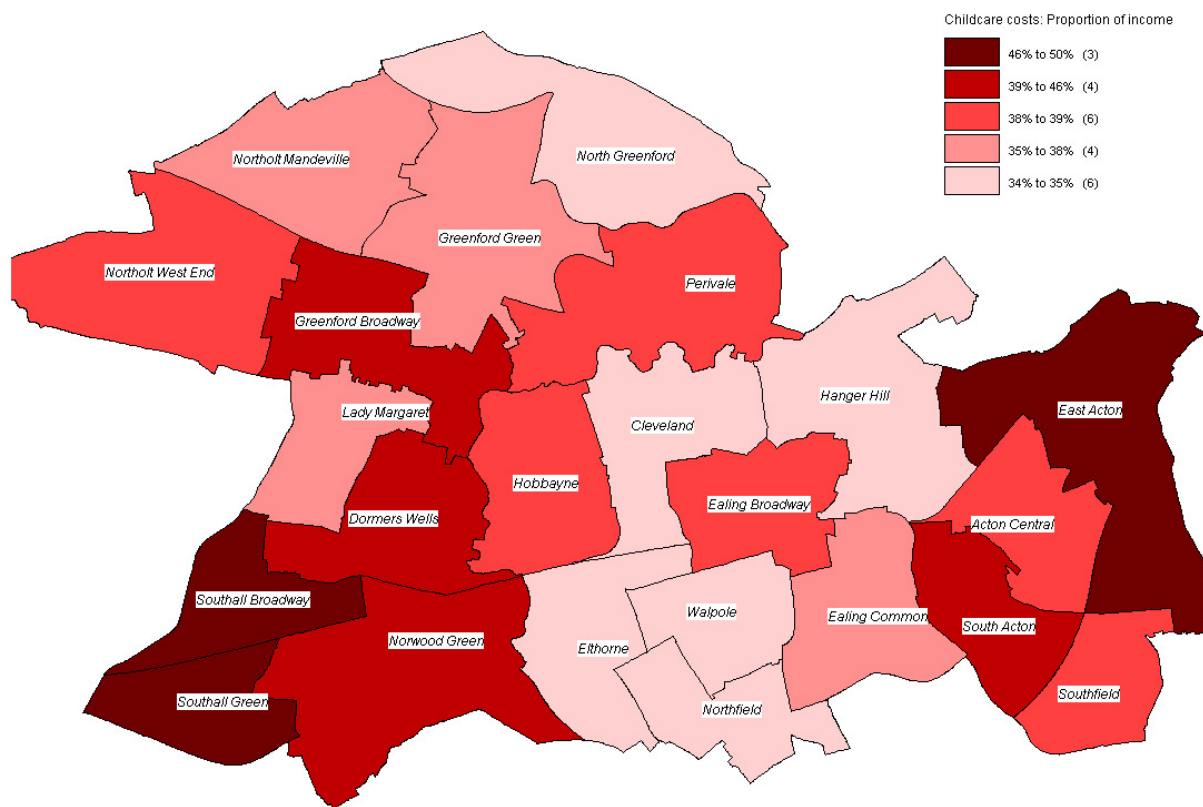
The high number of places in Central Ealing compared to the population may suggest a surplus of provision, but the occupancy level is highest in the borough in this area. The vacancy data from childcare providers suggested the W5 area was nearly at full capacity and may be able to support more provision.

## **6.2 Income gaps – shortage of affordable childcare**

Childcare prices for under fives have risen significantly across all types of childcare and all areas of the borough, whilst at the same time, household income has remained largely static. With government support schemes for low income households being reduced from April 2011, it will be increasingly more difficult for Ealing parents to afford childcare. It does not help that the main government support scheme to help low income working families to use childcare has such a low takeup rate in Ealing compared to the rest of the country.

Comparing household incomes with hourly childcare prices offered by childminders, it was possible to calculate the proportion of a families income that would be spent on childcare if they took up a full time place for the whole year. A map of the results follows which shows the areas where childcare is least affordable to be in Southall and Acton.

These figures are likely to be higher than what parents actually pay as these are advertised hourly rates and parents may be able to negotiate lower fees or use less hours. According to a recent OECD report, Gender Brief 2010, childcare costs in the UK account for 33% of a families net income.



Source: CACI Paycheck 2010 and FIS data January 2010

The areas with the highest prices tend to be in Acton and Ealing and these areas could be very difficult for parents with lower incomes to find affordable provision. The data from Jobcentre plus shows that parents with older children were finding cost a barrier despite the relative stability in prices in this sector.

In Southall, the cost of provision for under twos was the main barrier to using childcare despite having the lowest average prices in the borough.

Childcare providers running costs are likely to continue to rise in the following years with a high level of inflation for food and premises costs and requirements for higher qualified staff which will cost more to recruit and retain. Therefore prices are also likely to continue to rise and it is likely that affordability will be the main barrier to childcare usage for the next few years.

### 6.3 Specific Need gaps – shortage of places for children with special requirements

The survey data from parents shows that significant numbers of children with additional needs are accessing mainstream childcare, but also that more parents would like to but are concerned about inclusion issues. The process of improving the information about what is available to these parents has already begun and should help to reduce this problem. The uptake in grants for out of school childcare shows that this demand was previously not being met.

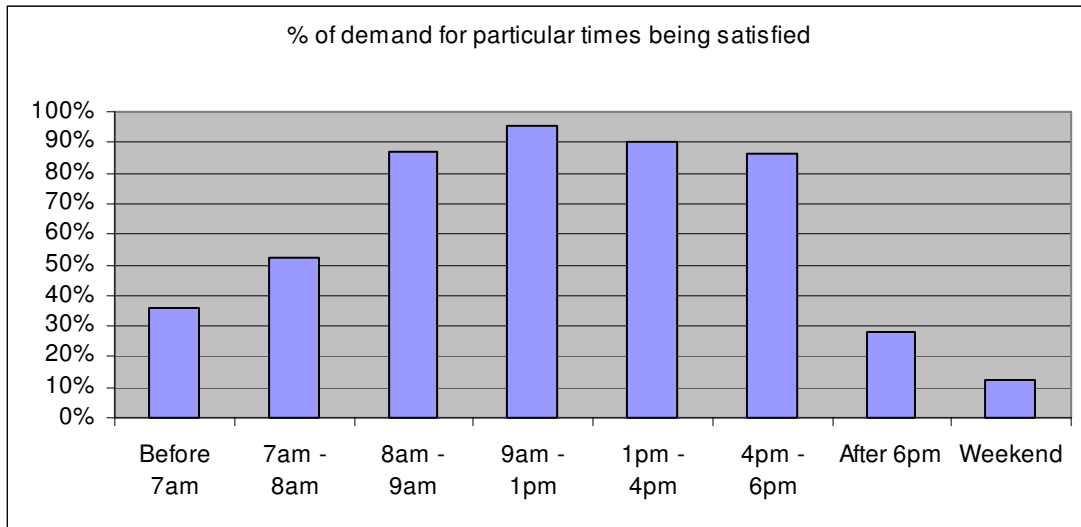
The number of pupils in Ealing schools with Special Education Needs has risen substantially, and although there has been additional support available through extra Children’s Centre places and Inclusion funding, it has not kept up with the need for places.

The number of children on the CIN panel waiting list and the amount of time children have to wait, shows a lack of capacity within the boroughs Children’s Centres. Failing to deal with issues

identified early may exacerbate them and mean that the problems are more ingrained and more expensive to deal with later on.

#### 6.4 Flexibility Gaps – shortage of childcare at particular times

The chart below shows the proportion of times that parents wanted compared to the actual times that childcare providers were offering.



Source: FIS surveys of 840 Ealing parents and 149 Ealing childcare providers 2010

The coverage for standard full time working hours is good and there are a small numbers of providers offering more flexible opening times. These tend to be childminders, and for parents wishing to use other types of care there is much less choice available.

It is good practice for childcare providers to ask their parents what their preferred hours would be, but there may not be enough demand at individual childcare providers to support longer or more flexible hours. The number of parents who reported opening times to be a barrier was very small, and childcare providers may find that extending opening times is not viable due to increased staff and premises costs.

#### 6.5 Age Gaps – shortage of childcare for particular age groups

##### 6.5.1 Under twos

Much depends on whether the official projections that suggest that birth rates have peaked are accurate. If the birth rate continues to rise, there could be a shortage of places for under twos. There is evidence from Jobcentre Plus that parents in Ealing and Acton are already having some problems finding places in these areas and the occupancy data suggests that the W5 area has the lowest spare capacity.

##### 6.5.2 Two year old funding

There is a shortage of places available that meet the quality criteria for the two year old funding. It is already difficult to place children in some areas which results in delays and some parents not taking up places. Given that these places are targeted at the most vulnerable families who are least likely to be using childcare without this support, not filling all of the 218 allocated places is a big loss to local childcare providers and families. If this funding is expanded in future it is likely that many eligible children will not be able to take up places without a change to the criteria.

### **6.5.3 Take up of the free entitlement for three and four year olds**

Comparing the highest pupil count for the summer term 2010 (9462) to the projected population of three and four year olds (9700) gives a very high take up rate of 98%. It should be noted that the summer term is usually the highest count for the year and at different points of the year there will be lower numbers.

The FIS survey data did not find any evidence of different take up rates among families with different income levels, ethnicity or in different areas, but there is evidence that awareness of the scheme is low.

### **6.5.4 Childcare for school aged children**

There has been a large expansion in places and the occupancy data suggests there is currently spare capacity in out of school care so the continuing increase in pupil numbers should not be an immediate problem. However, the data from Jobcentre plus suggests some parents may still be having problems finding places which is likely to vary between individual schools as many clubs tend to be based in and ran by schools purely for their own pupils.

### **6.6 Type Gaps – shortage of particular types of childcare**

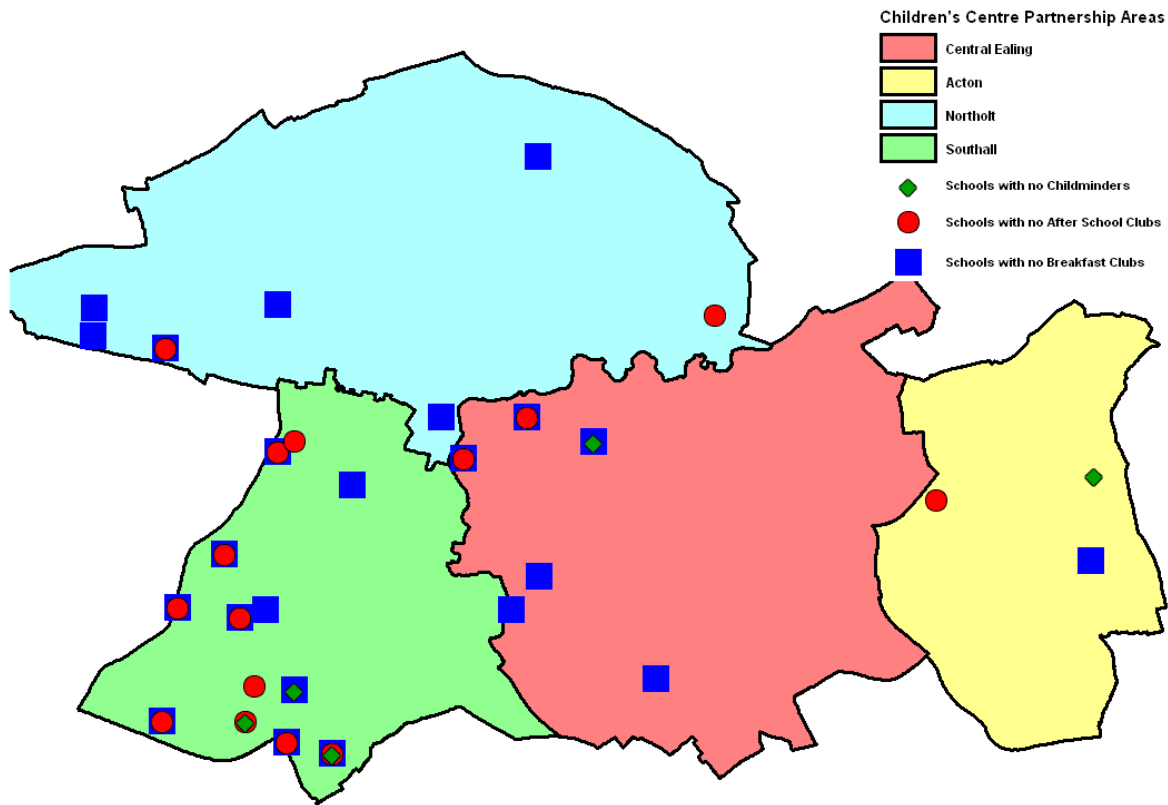
Ealing has a diverse childcare market with a range of different types of private, voluntary and local authority provision. In some parts of the borough there is less choice available of different types of provision.

#### **EY Provision**

The numbers of childminders and pre schools have been dropping for the last few years, but these losses have been more than replaced by the growth in day nurseries. Demand for day nurseries is strong and the Ealing and Acton areas have reported shortages of places for under twos. The Ealing area has all types of childcare, but there are few pre schools or independent schools in any other areas.

### Schools with no access to before or after school care

The map below shows primary schools in the borough that currently do not have a full range of before and after school childcare options.



Source: FIS data January 2011

Most schools have childminders that collect or drop off from them, and the majority of schools in Acton, Ealing and Northolt also have breakfast and after school clubs. The Southall area has a significant number of schools that do not have breakfast and after school provision.

The only primary school with no access to any after school, breakfast clubs or childminders is the new Khalsa Primary in Southall, which opened in 2010 so may need to allow time for provision to open.

The schools that do not have all the different types of provision report that they have done research with parents and found that there is not demand for childcare. Some schools have previously had provision running that was not sustainable and closed. In Hanwell there are large numbers of registered childminders, which parents in this area prefer to group childcare. Some schools also report that their programme of extended schools activities reduces the need or demand for any additional services.