

**Childcare
Sufficiency
Assessment
Annual Update
2020**

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Introduction

The Local Authority is required by law to 'report annually to elected council members on how they are meeting their duty to secure sufficient childcare, and make this report available and accessible to parents'.¹ We have prepared this report in order to meet this duty.

Having sufficient childcare means that families are able to find childcare that meets their child's care and learning needs and enables parents to make a real choice about work and training. This applies to all children from birth to age 14, including children with disabilities. Sufficiency is assessed for different groups, rather than for all children in the Local Authority.

This is the 2020 annual update further to the full Childcare Sufficiency Assessment (CSA) published in 2018 and subsequent annual update in 2019. This year however is different, in that sufficiency must be considered in the context of the Covid-19 pandemic and its impact on early years and childcare. In this report, we have used data on the need for childcare and the amount of childcare available, maintaining core measures utilised in the previous assessments for comparative purposes. In addition, new methods and measures have been implemented to assess childcare sufficiency and the sustainability of the childcare market, with the unique and dynamic challenges presented by the ongoing Covid-19 pandemic.

We use information about childcare sufficiency to plan our work supporting the local childcare economy. This update will identify key findings and highlight any changes over the past year using baseline data but will also investigate how the pandemic has changed childcare and early years. It will also report on local authority actions and strategies to support the childcare market in the face of this unprecedented crisis. It should be noted that upon completion of this assessment, the government announced a second national lockdown due from 05 November to 02 December 2020, to tackle a second peak in Covid-19 infections. However, on this occasion childcare settings, early years and schools will remain open for all children.

Executive Summary

- There was a sufficient supply of childcare to meet demand before, during and after the national lockdown implemented by government in response to the Covid-19 pandemic. Brokerage between the Local Authority, childcare providers and parents managed to identify and provide suitable childcare provision for all key worker and vulnerable children who needed it during lockdown.
- Demand for childcare has changed considerably since the re-opening of early years childcare provision for all children in June. Providers reported little over half of children returned after lockdown on average, with many parents/carers having safety concerns in relation to Coronavirus. Demand has picked up into the autumn term as parent/carer confidence re-builds. However, as virus cases rise once more with subsequent local and national response measures, future demand is uncertain and

¹https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/718179/Early_education_and_childcare-statutory_guidance.pdf

likely to fluctuate, impacting on the sustainability and effective business planning of childcare providers. The prospect of an effective vaccine has increased confidence.

- Early years and childcare providers have endured significant financial insecurity since lockdown. Lower demand, less income from fee-paying parents, additional costs of making provision Covid-safe and costs of overheads and retaining staff are taking their toll. Even with the financial support available via government and short-term securing of early education funding entitlements at 2019 levels, many are struggling to sustain themselves. The market has shown resilience and adaptability, managing to operate in new ways with health and safety the priority. However, with part-closures when Coronavirus cases are identified, and ongoing financial uncertainty, sustainability is fragile. To date, one private pre-school and several childminders have permanently closed as a direct result of the pandemic, however the net loss so far is negligible as new providers have opened. The health of the market will be monitored closely going forward with regular provider engagement.
- The Local Authority has taken actions and implemented strategies to support the childcare market through the pandemic and to be prepared for any future national lockdown which affects childcare provision. Key to this, was working with partners and departments within the Local Authority to push to secure early years and childcare in economic strategy recovery plans. However, much will depend on any support available from central government. Termly sufficiency tracking is also key to assessing the changing levels of supply and demand.
- There continues to be a sufficient supply of childcare provision to meet the needs of children requiring funded childcare places. Participation by providers offering 2, 3 and 4 year old funded places has increased further, improving access to these entitlements for children and families. To encourage and maintain participation, the Local Authority has provided workshops and training on the funding entitlements and online claims process. Going forward, online solutions have been implemented, as long as social distancing measures continue as a result of the pandemic.
- Harrow has maintained its position as a high performing borough in relation to national benchmarks for educational outcomes and inspection outcomes. The high quality of early years provision in school nurseries and the PVI sector remains unchanged whilst further improvements in quality have been made by childminders over the past year.
- The low level of take-up for funded early education for 2 year olds in Harrow remains a concern. There has been a further small reduction in take-up over the past year, continuing the trend from the previous year. Take-up is below both regional and national comparators. This is despite work carried out since 2019 by the DfE grant funded 'Together for Two's' project which works with several local authorities who have identified low take-up rates. The project is facilitated by PACEY (professional association for childcare and early years) providing local and direct interventions to grow the number of disadvantaged families taking up the offer, particularly with childminders, and to increase the number of childminders offering the entitlement. A

childminding development worker has been undertaking targeted outreach and working with strategic partners, however, since an extension to the project was confirmed from March 2020 for a further 18 months, much of the work has had to be put on hold or limited by the impacts of the pandemic.

- The take-up of universal funded early education for 3 and 4 year olds remains consistent with previous years and is higher than regional comparators. Take-up of the extended hours entitlement continues to increase when comparing like-for-like terms. However, through the course of the year, overall demand for childcare including funded places has been impacted by Covid-19 and therefore local and national figures may look very different going forward.
- The supply of places for the extended entitlement (30 hours) is sufficient and continues to increase, exceeding local demand. The growth has started to slow and there is no indication that recent increases have had any impact on provision and take-up of universal funded places or 2 year old funded places in Harrow.
- Whilst the total number of early years childcare providers continues to fall, the number of places available continues to increase. The growth in day nursery provision and places makes up for the shortfall in childminding and pre-school provision which continues to decline, however it may start to limit parental choice of provision type at a local level. The drop in childminder numbers mirrors the national trend.
- The early years' population projections remain stable. Growth of the school age population is expected to continue albeit at a slower rate than previously. More school age childcare provision may be required to meet potential growth in demand. Growth in the market recorded in 2019 has stabilized over the past year. To date, impacts of the pandemic on the supply of school aged childcare provision has been limited but will need to be watched closely over the next year.
- Queensbury, Wealdstone, Canons and Kenton West have been identified as priority wards. The first three were identified as priority wards in the past two assessments and remain so, containing some of the lowest numbers of PVI childcare places whilst having considerable cohorts of early years children. Kenton West has joined them, having lost a considerable number of childcare places over the past year and now contains the second lowest number of places of all wards after Queensbury. Choice is restricted in Kenton West and Queensbury with only 3 childcare providers operating in Kenton West and 4 in Queensbury. Harrow Families Information Service and the Early Years Team highlight these findings to enquirers interested in setting up childcare provision, or existing providers looking to expand in Harrow, to encourage new provision in these priority wards.
- Greenhill and Marlborough remain as the wards with the highest early years cohorts but Marlborough is now the only ward with significant projected growth, based on population projections. Marlborough continues to have the largest supply of childcare places in the borough and is well placed to meet future demand, as long as current

levels of provision are maintained. However, Wealdstone can potentially be considered a growth ward along with Marlborough, further to confirmation of a new development partner in September 2020, for planned regeneration in the ward including Wealdstone town centre. With low numbers of childcare places and redevelopment due to start over the next couple of years, new childcare provision must be considered a priority in the Wealdstone area. Marlborough and Greenhill are adjoining wards, parts of which will be affected by the project, so it is important to maintain existing high levels of provision in these locations to cope with potential added demand and overspill from Wealdstone.

- Queensbury, Headstone South and Marlborough have no pre-school provision and Kenton West has no childminders operating, potentially limiting choice for parents/carers in these wards. However, most wards are geographically small and neighbouring wards do offer an alternative choice of provision.
- Childcare for children with special educational needs and disabilities (SEND) is available in Harrow. The number of early years children with SEND continues to increase in PVI settings reflecting the growing demand for SEND services, support and appropriate childcare. Contrastingly, the number of early years children with SEND in school nursery provision has fallen over the past year. The primary need for the majority of children requiring SEND support remains speech and language and communication and interaction. However, the proportion of children with social, emotional and mental health needs has increased, which may increase further as a result of strains and pressures caused by the Covid-19 pandemic (yet to be evidenced). Support strategies are in place for early years childcare providers and SEND children within them, via the Harrow Early Years Team, in the form of an inclusion fund, SEND drop-in surgeries for providers and targeted support visits tracking individual children's needs (It should be noted, most support and resources have had to be electronic based or via telephone over the past few months due to the pandemic). Provider SEND registers are collated on a termly basis to ensure children can be tracked. Awareness and understanding of the inclusion fund by providers continue to improve, reflected by the increasing numbers of inclusion claims and improved engagement with the Local Authority in supporting children with additional needs. The aim of the inclusion funding is to ameliorate need and enable children to access learning and the social life of the setting and to make progress across all the early learning goals. In all cases, progress and greater access has been reported. Impact analysis by childcare providers continues to be positive. The Early Years Area SENCO (special educational needs coordinator) is continuing to track the progress of all children supported through this funding.
- Children with an EHCP (education, health and care plan), were included in the government's definition of 'vulnerable children' during the national lockdown. These children were identified and offered suitable childcare provision during lockdown, although many parents chose to keep them at home, mainly due to health and safety concerns for already vulnerable children. In these cases, resources were shared with childcare providers to deliver suitable interventions and support in order for children to continue appropriate home learning.

Covid-19 pandemic – supporting childcare providers and parents/carers

All sections of the economy have been impacted by the Covid-19 pandemic and subsequent government lockdown. This includes the early years and childcare sector, which after having to close to the wider community between late March and June 2020 (except for vulnerable children and those of key workers), then had to struggle with financial implications and changing parental behaviours post-lockdown, which have impacted on demand.

The Local Authority played an important role in supporting both childcare providers and parents/carers during lockdown and thereafter. In the context of the unique situation, this new section of the sufficiency update provides a log of the work and actions taken by the Harrow Families Information Service and Early Years teams in providing this support, advice, guidance and information.

The sustainability of the early years and childcare market is vital to the recovery of the wider economy, not only to ensure the best start in life for children through early education but also for practical reasons, so parents/carers can return to work, training or education. Therefore, the role of the Local Authority in supporting the sector via a variety of means, was, and continues to be vital in sustaining the market as far as possible in such a dynamic and challenging situation.

Actions taken by Harrow

Most of the actions taken by Harrow were pro-active, but on occasion had to be re-active in response to new and changing government and DfE advice and guidelines, as well as emerging areas of need/support from conversations with childcare providers and parents/carers.

Chart 1 outlines the main themes of enquiries made to Harrow Families Information Service and Early Years by childcare providers, and the actions taken to support them.

Chart 2 outlines the main themes of enquiries made to Harrow Families Information Service and Early Years by parents/carers and the actions taken to support them.

Chart 1: Support for childcare providers

Provider enquiry themes

- Guidance about closures
- Early education funding entitlement arrangements
- Financial support, advice and guidance
- Staying open for key worker and vulnerable children
- Covid-19 safety procedures, social distancing expectations (for settings open for key worker and vulnerable children) and PPE enquiries
- General information and clarification of government, DfE and local advice and updates
- Information about re-opening provision to all children – expectations, risk assessments and virus testing
- Transition and deferred school places
- Staff furlough and Coronavirus Job Retention Scheme



Support Provided

- Sharing both national and local updates with providers – including help interpreting DfE and Public Health England guidance.
- Daily noticeboards and communications keeping all providers informed with the national and local situation, and informing them through the pandemic with resources, information and online facilities to continue supporting children's early education from home
- Training support – help around online training and accessibility. Answering provider queries concerning training needs for staff
- Business support and financial assistance/advice – signposting to all Coronavirus financial support available nationally and locally
- Early years funding entitlement support – detailing local arrangements and sharing/interpreting DfE funding guidance updates and temporary changes. Answering all queries
- Regular contact – one to one advice and support for providers around expectations and responding to provider concerns.
- Brokerage - supporting providers in staying open for vulnerable children and those of key workers by providing brokerage support. Identifying those children requiring a place during lockdown and finding suitable provision by collaborating with providers.
- Provider surveys upon re-opening of childcare provision to gather feedback about supply/demand, sustainability issues and provider concerns for the future
- Risk assessment template produced and circulated with local authority guidance to all childcare providers prior to re-opening
- Online Coronavirus guidance for childcare providers and staff via the childcare and early years homepage on the Harrow website:
<https://www.harrow.gov.uk/coronavirus-covid-19/coronavirus-guidance-childcare-early-years>

Chart 2: Support for parents/carers

Parent/carer enquiry themes

- Key worker parents looking for available provision while most childcare settings were closed
- Securing funding for key worker and vulnerable children during lockdown
- General childcare and funding queries – advice and guidance required
- Querying charging of fees and retainers while settings were closed
- Health and safety related queries upon re-opening of childcare settings
- Finding childcare provision for the first time after lockdown
- Financial support available outside of funding entitlements



Support provided

- Brokerage support - steps taken to ensure vulnerable children and those of key workers are able to access childcare provision. Lines open for these parents to request support in securing provision and funding for their children. Places were brokered by matching children to available provision as near as possible to home.
- FIS helpline and email support - advice and assistance provided in response to parent/carer enquiries, available throughout lockdown.
- Online Coronavirus guidance and resources for parents/carers made available via the childcare and early years homepage on the Harrow website: <https://www.harrow.gov.uk/coronavirus-covid-19/coronavirus-guidance-childcare-early-years/2>
- Home learning resources and information for continuity of learning posted online and shared with providers to help their parents/carers

Analysis of initial actions and intelligence

As well as supporting the needs of childcare providers and parents/carers during lockdown, intelligence was gathered in the form of surveys, audits and conversations with providers, parents and partners to help provide a clearer picture of the local childcare market trends, including key concerns and needs. Since the start of lockdown, weekly audits of childcare providers have been carried out to supply data for the DfE returns analysis. This helped track the number of providers (of different types) that were open or closed and the number of children attending childcare (including vulnerable children and those of key workers) on a weekly basis. An analysis of this data and what it tells us about market trends is included in the supply and demand sections of this assessment.

The results of local authority support and actions, combined with information collected via provider and parent surveys/enquiries has produced the following key findings:

- **Parent/carer brokerage:** There was sufficient childcare available for key worker and vulnerable children throughout lockdown as evidenced through brokerage provided via the local authority. For those key worker and vulnerable children whose existing early years childcare provision was closed, new provision was found for all who needed it:
 - New places secured for 64 children between 24 March and 04 April 2020 (end of spring term). Of these 15 were funded and 49 were fee-paying.
 - New places secured for 83 children between 20 April (start of the summer term) and 01 June 2020 (end of lockdown). Of these 23 were funded and 60 fee-paying.
 - In total, new provision was secured for 147 children during lockdown.
- **Parent/carer and provider queries:** During the national lockdown more than 600 enquiries were made to the Families Information Service. These comprised of circa 40% from parents/carers and 60% from providers and practitioners. The main themes of these enquiries are listed in charts 1 and 2.
- **Business rate relief for nurseries:** There are 63 official private, voluntary or independent (PVI) nurseries in Harrow that pay business rates. All had their business rates exempt through the 2020/21 nursery exemption scheme which has given them a total of £512k in relief².
- **Harrow discretionary grant fund for nurseries:** Whilst nurseries were excluded from the government's statutory business grants scheme, Harrow elected members approved that they could apply for the Harrow discretionary grant fund to the award of £10k³. The conditions for early years nurseries to apply for this scheme included:
 - Must employ between 2 and 9 people at the time of application. This includes furloughed employees.
 - Trading for 12 months prior to 01 June 2020.
 - Demonstrate a 50% loss of income as a result of Covid-19.

² Harrow Council Collections and Benefits

³ Harrow Council Collections and Benefits

- Occupy non-residential property, or part of a property, with a ratable value or annual rent or have annual mortgage payments below £51k.
- Have a Harrow trading address.
- **Provider survey feedback:** As lockdown came to an end in June, providers were asked a series of questions to gauge the impacts of the support and communications provided and to identify the key needs of PVI nurseries and childminders upon re-opening. Of those that responded:
 - 79% of PVI settings were aware of the financial support available and the remaining 21% were partially aware.
 - 89% of childminders were aware of the financial support available and the remaining 11% were partially aware.
 - 91% of PVI settings accessed financial support. 9% said they did not (although all PVI settings continued to receive their early education funding entitlements).
 - 77% said they accessed the **Coronavirus Job Retention Scheme**
 - 9% said they accessed the **Small Business Grant Fund**
 - 11% said they accessed the **Harrow Discretionary Grant Fund**
 - 32% said they accessed **Business Rate Relief**
 - 5% said they accessed other support via **CIBLS loans**
 - 100% of childminders that responded accessed financial support
 - 44% said they accessed early education funding entitlements
 - 11% said they accessed the **Coronavirus Job Retention Scheme**
 - 11% said they accessed the **Small Business Grant Fund**
 - 78% said they accessed the **Self-employment Income Support Scheme**
 - When providers were asked what their key needs were upon re-opening provision, feedback identified that:
 - 63% of PVI respondents and 39% of childminders believed that **more income and financial support** was required to sustain their provision.
 - 47% of PVI respondents and 28% of childminders needed **to fill places/vacancies**.
 - 23% of PVI respondents and 11% of childminders identified **making their provision Covid-safe** and obtaining PPE (personal protective equipment) as a key requirement.
 - 11% of childminders that responded, stated that **getting back to work full-time** was a priority (some had been shielding)
 - 9% of PVI respondents thought **reassuring parent confidence** was a key requirement.
 - 5% of PVI respondents identified **staff retention** as an immediate need.
 - 9% of PVI respondents identified as having **no key needs** or requirements.

- **PPE for childcare providers:** It became clear from conversations with childcare providers and feedback via the provider survey, that the need for personal protective equipment was a key priority upon news that childcare settings could re-open from 01 June 2020. Guidance on operating in small bubbles and help around risk assessments were received well by providers, however obtaining PPE and the costs involved remained an issue. Harrow secured some PPE starter packs for those that requested it, going some way to meeting this need. However amounts were small due to limited budgets and many providers had to deal with the added costs of making their provision Covid-safe, and there were even examples of nursery owners paying for virus testing for their staff, in order for them to come back to work.

Looking ahead: next steps and preparing for future lockdowns

- Securing early years and childcare within economic strategy recovery plans
- Termly sufficiency tracking – keeping abreast with what supply and demand looks like:
 - Data collection and continued sufficiency reporting via DfE returns analysis and keeping local leadership and elected members informed
 - Ongoing provider/parent surveys and audits. Encouraging providers to obtain parent feedback
 - Identifying areas where sufficiency may be at risk from closures and focus on disadvantaged children
- Building parent and provider confidence via messaging and communications to stimulate demand
- Regular contact with providers to offer support and information. Open dialogue to inform recovery plans
- Targeted business support for providers around financial sustainability
- Supporting attendance of vulnerable children – maintain established relationships with partners developed during lockdown as part of future strategies to ensure vulnerable children are supported appropriately
- Planning for future lockdowns:
 - Keeping informed of local virus outbreaks, and local/national measures
 - Use established strategies for ensuring key worker and vulnerable children have access to childcare provision
 - Sharing and deciphering government, DfE and Public Health England communications with childcare providers in a timely manner
 - Establishing and maintaining strong working relationships with partners around economic recovery (Collections & Benefits, Housing (commercial property), Business and Commercial, JCP and Economic Development teams)
 - Facilitating the market and new provision.

Demand for childcare

Population of early years children

In total, there are 18,000 children under the age of five living in Harrow. These children may require early years childcare. The latest population estimates are based on the Greater London Authority (GLA) 2016 based trend projections, updated annually.

Table 1: Early years population by age⁴

Age	2016	2018	2020	2021	2023	2025
Age 0	3600	3600	3600	3600	3600	3600
Age 1	3400	3600	3600	3600	3600	3600
Age 2	3500	3600	3600	3600	3600	3600
Age 3	3600	3500	3600	3600	3600	3600
Age 4*	3700	3600	3600	3600	3600	3600
Total:	17,800	17,900	18,000	18,000	18,000	18,000

* Some four-year-olds will have started reception

The GLA projections report that the early years population in Harrow has remained relatively stable over the last few years with only a negligible increase between 2016 and 2020. It is expected to remain consistent for at least the next five years, with little or no deviation.

The data projections of the early years population on a ward level going out to 2025, remain largely unchanged since the previous sufficiency update in 2019. In summary most wards with the highest cohort of early years aged children are located in central Harrow (with one or two exceptions) and the wards with lowest cohort of early years aged children are located in the west of Harrow. This correlates well to the overall populations of each ward.

- Wards with the highest early years population:
 - Greenhill
 - Marlborough
 - Edgware
 - Wealdstone
 - Roxbourne
- Wards with the lowest early years population
 - Pinner
 - Hatch End
 - Pinner South
 - Headstone North
 - Rayners Lane
 - West Harrow
- Wards with the greatest projected growth of the early years population (up to 2025):
 - Marlborough

⁴ GLA population projections: The population projections have been rounded to the nearest 100

Marlborough is the only ward with significant projected growth of the early years population up to 2025. Greenhill was previously cited as a growth ward, but only negligible growth is now expected over the next couple of years before returning to existing population levels by 2025. West Harrow is the only other ward expecting growth in the early years population by 2025, but the expected increase is insignificant. All other wards are expected to maintain existing population levels or very slight decreases by 2025.

Therefore, overall expected demand for childcare by the early years age group in Harrow remains largely unchanged on a borough and ward level, with the most significant potential impacts on demand likely in and around the growth ward of Marlborough. This assumption is based on population projections only. Other factors such as the ongoing Covid-19 emergency, have had and will likely continue to have impacts on demand for childcare, which will be assessed later in this section.

Population of school age children

In total there are 24,400 children aged 5-11, and 9,500 children aged 12-14 living in Harrow. These children may require childcare before and after school, and/or during the school holidays.

Table 2: Population by age⁵

Age	2016	2018	2020	2021	2023	2025
Age 5	3500	3600	3500	3600	3600	3600
Age 6	3400	3700	3500	3500	3600	3600
Age 7	3300	3500	3600	3500	3600	3500
Age 8	3300	3400	3600	3600	3500	3500
Age 9	3000	3300	3500	3600	3500	3500
Age 10	3000	3300	3400	3500	3500	3400
Age 11	2900	3000	3300	3400	3600	3500
Total 5-11:	22,400	23,800	24,400	24,700	24,900	24,600
Age 12	2900	3000	3300	3300	3500	3500
Age 13	2800	3000	3000	3300	3400	3600
Age 14	2900	3100	3200	3200	3500	3700
Total 12-14:	8,600	9,100	9,500	9,800	10,400	10,800
Total 5-14:	31,000	32,900	33,900	34,500	35,300	35,400

Table Summary:

- The population projections remain unchanged from last year's update.
- The school age population continues to increase at a steady rate as opposed to the early years population which remains relatively stable.
- GLA population projections suggest a 4.2% increase in the 5-14 year old age group between 2020 and 2025. This compares to an increase of 8.6% between 2016 and 2020, suggesting the rate of growth is projected to slow.

⁵ GLA population projections: The population projections have been rounded to the nearest 100

Number of children with special educational needs and disabilities

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

Table 3: Number of children with an EHC plan in Harrow⁶

Age	Number of children 2019	Number of children 2020
Birth to school age	95	100
Primary school (reception to year six)	604	651
Secondary school (year seven to thirteen)	864	878
Total:	1563	1629

The number of children with an EHC plan includes children and young people whose resident address is within the London Borough of Harrow. These numbers include children who attend provision outside the Harrow Local Authority area. These are children and young people for whom the London Borough of Harrow has a direct responsibility.

Table Summary:

- There were 5 more children in the early years age group (birth to school age) with an EHC plan in 2020 compared to 2019, representing a 5% increase year on year
- School aged children with EHC plans also increased in 2020 compared to 2019, most notably in primary schools:
 - Primary school: +47 children (7% increase year on year)
 - Secondary school: +14 children (1.6% increase year on year)

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

SEND within Early Years

An inclusion fund is provided for funded children within PVI settings (including childminders) and school nurseries who require SEND support. The number of claims received helps identify those children with SEND within funded PVI provision (as displayed in Table 4). The number of claims has increased since the fund was introduced and as marketing and awareness of the fund has broadened. Children with an EHC plan are also recorded by PVI settings. Inclusion funding has evolved since its inception and now comprises of the following two streams:

⁶ Harrow SEN2 statutory return January 2019 and 2020

- **Targeted Block Funding:** The purpose of this fund is to support and improve the progress and attainment of all 3 and 4 year old children with SEND in literacy and numeracy (a total of 24 successful bids made during the spring and summer terms 2020).
- **Specific Child Fund:** for individual children with emerging needs identified across the 4 categories of SEND. The fund supports children with therapies and access to learning and development, for example via 1:1 support or supporting staff through training and mentoring. Claims could be made on a termly basis (1412 claims during the 19/20 academic year across all provider types – an increase of 378 claims or 27% compared to the previous academic year).

SEND within PVI Settings

Table 4: Number and percentage of pupils in PVI settings by SEN provision⁷

Harrow SEN				
PVI Settings				
	2019		2020	
SEN Provision	Number of Pupils	% of Pupils	Number of Pupils	% of Pupils
SEN Support (<i>Inclusion claims</i>)	359	9.5%	423	11.5%
EHCP (<i>Cumulative total over academic year</i>)	22	0.6%	26	0.7%
No SEN	3404	89.9%	3220	87.8%
Total	3785	100%	3669*	100%

*Attendance must be viewed in the context of the Covid-19 pandemic and childcare provider closures for half of the summer term. Pupil numbers include existing children carried over from the previous school term as well as newly registered children for the summer term.

Table Summary:

- In Summer 2020, 3669 pupils were funded in PVI settings
- 11.5% of funded pupils were on SEND support (2% increase year on year).
- 0.7% of funded pupils were SEND with an EHC plan (0.1% increase year on year).
- 87.8% of funded pupils have no SEND (2.1% decrease year on year).

⁷ PVI funding headcount data and Early Years inclusion funding claims Summer 2019 and 2020

Chart 3: Number and percentage of pupils receiving inclusion funding by SEN Primary Need

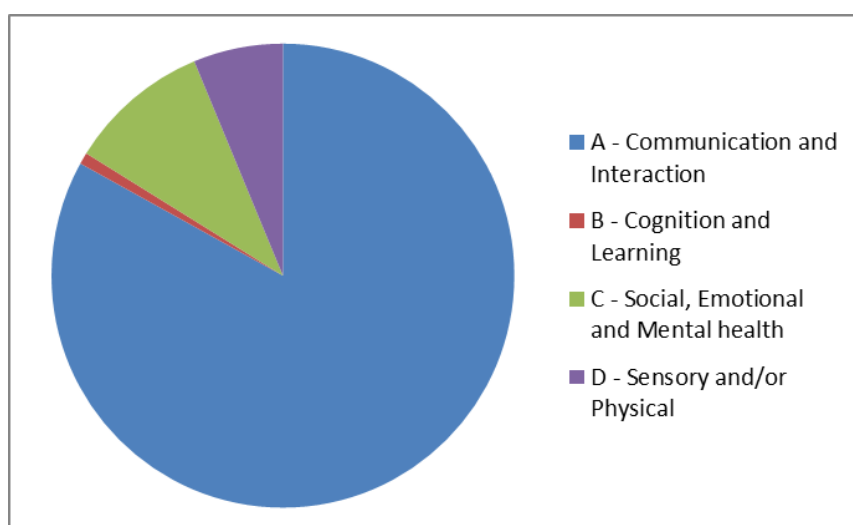


Chart Summary:

- The most common primary need of all funded SEND pupils is Communication and Interaction at 81%. This represents a 9% reduction year on year
- This is followed by:
 - Social, Emotional and Mental Health at 12% (6% increase year on year).
 - Sensory and/or Physical at 4% (1% increase year on year).
 - Cognition and Learning at 3% (2% increase year on year).

Harrow continues to offer a Disability Access Fund for funded 3 and 4 year olds in PVI childcare settings and school nurseries who are in receipt of Disability Living Allowance. This is a one-off lump sum payment to support their learning and additional needs. There were 23 successful DAF claims made in the 19/20 academic year.

SEND within School Nursery and Reception

Table 5: Number and percentage of pupils in School Nursery by SEN provision⁸

Harrow SEN				
NCY Nursery (N1 & N2)				
	2019		2020	
SEN Provision	Number of Pupils	% of Pupils	Number of Pupils	% of Pupils
SEN Support	88	6.9%	58	4.8%
Statement/ EHCP	18	1.4%	10	0.8%
No SEN	1173	91.7%	1152	94.4%
Total	1279	100.0%	1220	100%

Table Summary:

- In January 2020, 1220 pupils were in School Nurseries.
- 4.8% of pupils were on SEND Support (58 pupils). This represents a 2.1% reduction year on year.

⁸ School Census 2019 and 2020

- 0.8% of pupils were SEND with a Statement/EHC plan (10 pupils). This represents a 0.6% reduction year on year.
- 94.4% of pupils have no SEND (1152 pupils). This represents a 2.7% increase year on year.
- Overall, there are 68 SEND pupils in School Nurseries. This represents a 2.7% reduction year on year.

Table 6: Number and percentage of pupils in Reception by SEN provision⁹

Harrow SEN				
NCY – Reception				
	2019		2020	
SEN Provision	Number of Pupils	% of Pupils	Number of Pupils	% of Pupils
SEN Support	232	7.6%	244	7.9%
Statement/ EHCP	70	2.3%	65	2.1%
No SEN	2760	90.1%	2784	90%
Total	3062	100%	3093	100%

Table Summary:

- In January 2020, 3093 pupils were in Reception classes.
- 7.9% of pupils were on SEND Support (244 pupils). This represents a 0.3% increase year on year.
- 2.1% of pupils were SEND with Statement/EHC plan (65 pupils). This represents a 0.2% reduction year on year.
- 90% of pupils have no SEND (2784 pupils). This represents a 0.1% reduction year on year.
- Overall, there are 309 SEND pupils in Reception classes. This represents a 0.1% increase year on year.

The most common primary need of SEND Support pupils in School Nursery and Reception classes remains Speech, Language and Communication Needs. The most common primary need of SEND pupils with a Statement/EHCP in School Nursery and Reception classes remains Autism Spectrum Disorder.

Harrow Local Offer

The Harrow Local Offer is a focused online resource providing a central point of information, advice and support in the local area about services for children and young people aged 0-25 with special educational needs and disabilities. It was created jointly by parents and professionals fulfilling the local authority’s statutory requirements. Services and support are available across early years, education, employment and training, health, leisure and social care.

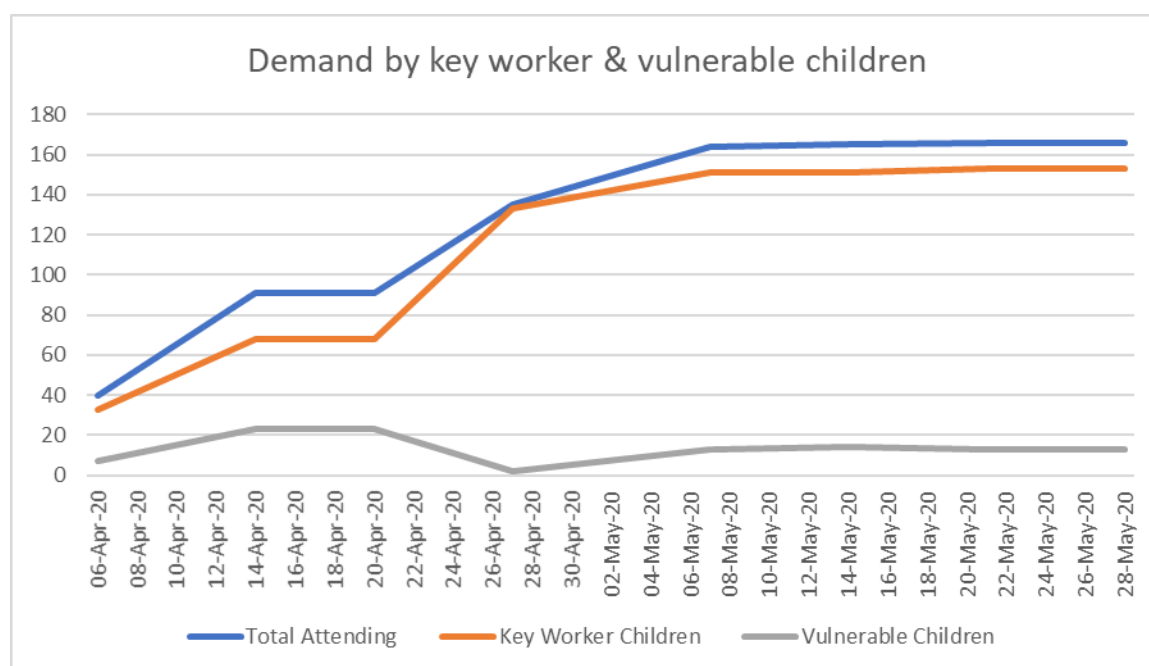
⁹ School Census 2019 and 2020

Demand for childcare during the Covid-19 national lockdown

Between 23 March 2020 and 01 June 2020, all schools and childcare settings were forced to close as part of the government’s national lockdown in response to the Covid-19 pandemic and to slow the spread of the virus. However, to enable key workers from critical services to go to work, childcare settings and schools were able to open to provide care and education for their children and those identified as vulnerable. All other children were to remain at home. The government released a list of critical workers who were able to access schools or educational provision during lockdown¹⁰. Vulnerable children included those with a child in need plan, child protection plan or looked after children, children with an education, health and care plan (EHCP) and those assessed as otherwise vulnerable by education providers or local authorities¹¹.

A collaborative effort between the Local Authority, schools and childcare settings helped identify key worker and vulnerable children and provided education provision/childcare to those that needed it. Brokerage was provided via Harrow Early Years and Families Information Service, finding suitable provision for key workers who contacted the service in need of childcare or whose existing provision was fully closed. The data in Chart 4, is taken from the DfE returns analysis whereby attendance figures for key worker and vulnerable children in early years provision in Harrow was requested on a regular basis.

Chart 4: Demand for early years provision during national lockdown¹²



Includes attendance within school nurseries, PVI nurseries and childminder settings

¹⁰ For more information see: <https://www.gov.uk/government/publications/coronavirus-covid-19-maintaining-educational-provision>

¹¹ For more information see: <https://www.gov.uk/government/publications/coronavirus-covid-19-guidance-on-vulnerable-children-and-young-people/coronavirus-covid-19-guidance-on-vulnerable-children-and-young-people>

¹² Harrow DfE returns analysis

Chart 4 Summary:

- Demand for early years childcare was met for all key worker and vulnerable children that required provision during the national lockdown. There were no reported cases of places not being found for those that needed it.
- The government lockdown began with only 2 weeks remaining of the spring term 2020, and the onset of the Easter holidays between 06 April and 20 April 2020:
 - As of **06 April**, there was a total of **40 children** within early years provision:
 - *33 key worker children and 7 vulnerable children*
 - As of **20 April** (start of the summer term), there was a total of **91 children** within early years provision
 - *68 key worker children and 23 vulnerable children*
 - As of 07 May, most children who required early years provision had accessed it and the figures plateaued. A peak of **166** children accessing early years provision was reached on **21 May**:
 - *153 key worker children and 13 vulnerable children*
- National data suggests approximately 5% of the number of children who usually attend childcare during term-time were attending early years provision on 21 May¹³
- Between the first DfE data return on 06 April near the start of lockdown, to the final data return of lockdown on 28 May, the number of children in early years provision increased by 315%.
- Whilst the number of key worker children requiring provision steadily increased with time before plateauing, the number of vulnerable children requiring provision peaked early on during the Easter holidays. Families of vulnerable children were encouraged to take up provision, however some may not have been keen on keeping them in provision as the summer term commenced and the number of key worker children rose. This may be due to safety and wellbeing concerns, with parents/carers preferring to keep their children at home with less mixing of other children (more especially those with SEND who may be even more vulnerable).

Families of children with EHC plans and children identified as vulnerable via children's social care were contacted to inform them of their eligibility for childcare and education provision during lockdown, but ultimately the decision on whether to access provision was theirs.

Demand for childcare after the national lockdown

As of 01 June 2020, early years childcare providers were permitted to re-open for all children. This included PVI nurseries, childminders and school nursery classes. Children in school reception, years 1 and 6 were also allowed to return as part of the staggered re-opening of childcare and education provision.

It was difficult to predict what demand would look like post-lockdown with the summer term half-way through, and the end of the academic year in sight, as well as lingering safety and welfare concerns due to Coronavirus. Changes to, and influences on demand will be assessed later in the report.

¹³ <https://www.gov.uk/government/publications/coronavirus-covid-19-attendance-in-education-and-early-years-settings>

Data on attendance of children in early years settings continued to be collected for DfE returns after the national lockdown. Attendance figures for the second half of the summer term incorporated all early years aged children who returned to or joined provision for the first time, including key worker and vulnerable children. These can be viewed in Chart 5.

Chart 5: Demand for early years provision after lockdown¹⁴

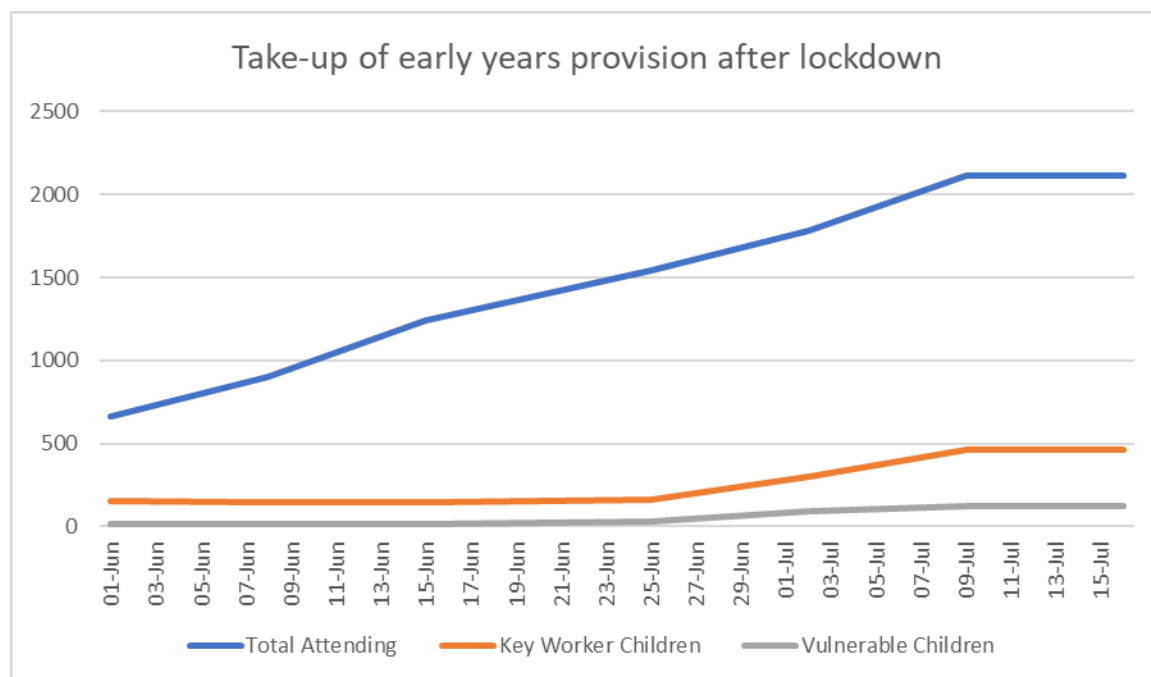


Chart Summary:

- As of 01 June, upon the re-opening of early years provision to all children, there was a total of 663 children in attendance, an increase of 497 children (299%) from the end of the previous week, when only key worker and vulnerable children could attend.
- Towards the end of term by 16 July, a total of 2,112 children were attending early years provision, an increase of 1,449 children (219%) from the wider re-opening of provision on 01 June.
- Attendance continued to increase on a weekly basis as more settings re-opened, before falling back again over the summer holidays
- Once early years provision re-opened for all children, attendance by key worker and vulnerable children continued at a similar rate as to the end of lockdown. However, the attendance of both cohorts increased significantly between late June and the end of term.
 - 190% increase in key worker children attending early years provision between 25 June and 16 July (159 to 461 children)
 - 346% increase in vulnerable children attending early years provision between 25 June and 16 July (28 to 125 children)

¹⁴ Harrow DfE returns analysis

There may be a number of reasons to explain this increase.

- As the wider attendance of early years aged children increased, so would numbers of key worker and vulnerable children who did not require or chose not to use childcare provision during lockdown.
- Parental confidence is also likely to have increased as the rate of virus infection declined, so many parents/carers may have waited until they felt safe enough to send their children back to childcare settings.
- Many key worker parents may have had partners working from home or furloughed during lockdown so they could look after their children at home, but once they returned to work as many were encouraged to do by July, childcare provision would be required once more.
- As of 15 June 2020, a combined total of 4,679 children were in attendance in early years settings, schools and colleges for the age groups permitted to return. Of these 3,325 pupils were in schools and colleges, with the remaining 1,354 children in early years provision¹⁵. In comparison the total figure as of 01 June, was 3,070. Therefore a 52% increase in total attendance across all childcare and education provision occurred within the first two weeks since re-opening. The figure reported was likely to be higher as not all settings had submitted their attendance data.

How demand for childcare has changed

It is difficult to assess new levels of demand compared to usual levels of attendance in early years settings, as data on fee-paying, non-funded children is not traditionally collected. However, comparing attendance levels post-lockdown with the total early years cohort in Harrow, together with data collected through provider surveys and national data collated via the DfE, can provide some useful estimates:

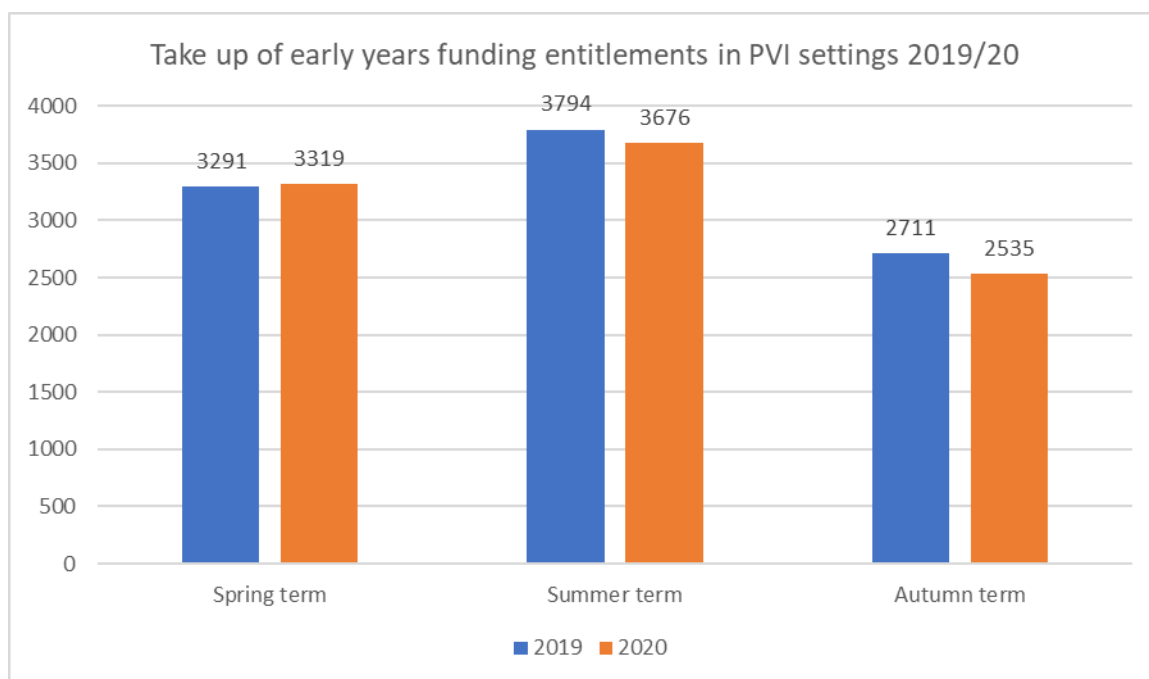
- The peak of 2112 children in early years provision by the end of the summer term 2020, represented 12% of the total early years cohort in Harrow. *However, it must be noted that the early years population of circa 18,000 includes all 4 year olds, many of who would be in school reception class rather than early years provision.*
- On 16 July 2020, when Harrow recorded peak attendance in early years provision for the summer term, the DfE estimated that nationally, 417,000 children were attending early years settings – about 25% of the number of children who usually attend during term-time¹⁶.
- A survey of early years providers collated in July revealed that on average:
 - 55% of all funded and non-funded children had returned to PVI nurseries
 - 66% of all funded and non-funded children had returned to childminder settings
- Figures on the take-up of funded childcare places in PVI settings are displayed in Chart 6¹⁷.

¹⁵ Harrow DfE returns analysis

¹⁶ <https://explore-education-statistics.service.gov.uk/find-statistics/attendance-in-education-and-early-years-settings-during-the-coronavirus-covid-19-outbreak>

¹⁷ Harrow early education funding headcount data

Chart 6: Take up of 2, 3 and 4 year old funding entitlements in PVI settings



* Summer 2020 figures must be viewed in the context of provider closures for half of the summer term. Figures include existing funded children carried over from the previous school term whether they attended or not when settings re-opened, as funding had been safeguarded. Autumn 2020 figures are correct as of 02 November 2020.

Chart Summary:

- Spring term 2020 funding claims had been processed and finalised prior to the start of the Covid-19 emergency so can be viewed under ‘normal circumstances’ whereby take-up of funding entitlements was almost identical to the previous year with just 0.8% growth.
- Take-up of funded entitlements for the summer term 2020, fell by 3.1% year on year. It should be noted that actual take-up was much lower as reported by providers, as funding was secured for all children registered for the summer term regardless of whether they attended after settings re-opened in June.
- Take-up of funded entitlements for the autumn term 2020 fell by 6.5% year on year. The autumn figures perhaps give the most accurate indication of how demand for funded places has been affected by the pandemic, as childcare providers have been able to open throughout the term to date and have been open to all children.
- Demand for funded places in the second half of 2020 has fallen, whereas in usual circumstances funded take up remains steady or increases slightly when comparing like for like terms, year on year.

Looking ahead - factors influencing demand for childcare

A variety of factors must be considered when looking ahead at what future demand for childcare might look like. New patterns of demand are emerging and must be tracked closely, especially due to the dynamic situation of the Covid-19 pandemic and ongoing government response. Parent/carer behaviours are changing due to the pandemic, and consequences of the crisis on the social and economic landscape have and will continue to have an effect.

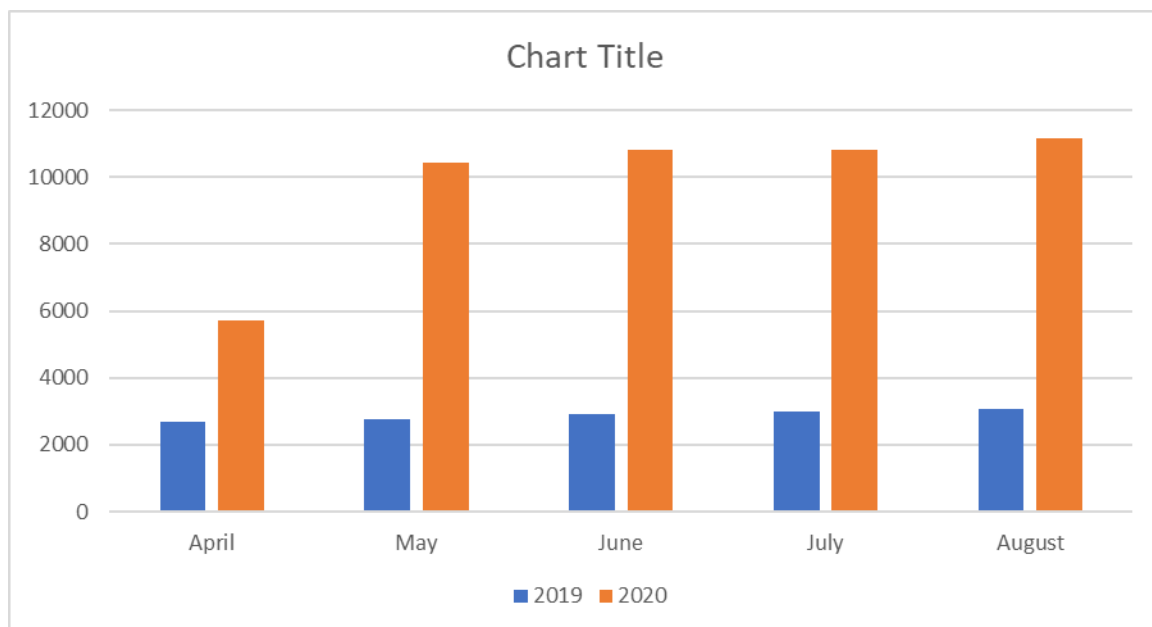
- *Regeneration and development plans:*
 - The national Covid-19 lockdown resulted in construction work having to cease temporarily on most Harrow sites for about a month, leading to a slight slippage in site and housing completions. However, provisional figures from the 2019/20 Housing Trajectory show that net housing completions are slightly above the level being projected for this year. The current trajectory also suggests that the housing target for 2020/21 is likely to be exceeded¹⁸. Therefore, demand for childcare is unlikely to be limited by any delays to housing completions.
 - The planned regeneration of the Wealdstone area including the existing Civic Centre site has been delayed for some time, however a new development partner was confirmed in September 2020. It is intended to transform the landscape of Wealdstone, building 1,500 new homes, including a significant number of affordable homes, a new civic centre, shops, offices, and a school, as well as public and green spaces. The first new homes are due to be built in 2022. Demand for childcare in and around the Wealdstone ward is very much likely to be affected, during and after the regeneration. Looking ahead, particular attention must be given to ensuring sufficient childcare provision to meet the likelihood of increased demand in this area within two to three years' time.
- *Economic Indicators:* The Covid-19 pandemic has had and continues to have significant impacts on the economy. Significant proportions of the workforce being furloughed for periods of time, changes in working behaviours/patterns, and higher unemployment, all impact on demand and requirements for childcare:
 - As of 30 July 2020, almost 30,000 people had been furloughed in Harrow, meaning they were unable to work due to their workplaces being temporarily closed or there not yet being enough work for them to return. The government paid 80% of their usual earnings while on furlough. Some of these will have been parents/carers of young children and being on furlough may have meant they no longer required childcare as they were at home or could no longer afford childcare due to lower income.
 - The pandemic also resulted in changes to how people work, with many people working from home if they were able to. Even after the national lockdown ended, many companies and organisations allowed staff to continue working from home. There may well be a long-term shift to new working patterns in some sectors with more flexible and home working, as it

¹⁸ Housing Regeneration Planning & Enterprise – completion and trajectory data

proved successful during lockdown for many, and also due to further peaks in the spread of Coronavirus. With more parents working from home, the need for early years childcare or wrap-around care for older children may no longer be required for some, so overall demand may decrease in these cases.

- Affordability of childcare is another factor likely to influence demand. With more parents/carers either out of work, earning less or on fewer hours than before the pandemic, affording childcare costs will be more difficult. In addition, many childcare providers have also suffered financially during the pandemic some of whom will have to increase fees in order to remain sustainable, thus making childcare even less affordable. This is likely to lead to decreasing demand for childcare, especially in the short-term.
- Unemployment has increased significantly in Harrow, with 18-24 year olds being worst affected. Chart 7 compares unemployment related benefit claims during the pandemic with the equivalent months from the previous year.

Chart 7: Harrow unemployment benefit claimant count¹⁹



**Universal Credit has a broader span of claimants that are required to look for work than under Jobseeker's Allowance. Consequently, as the Universal Credit Full Service is rolled out in particular areas, the number of people recorded as being in Claimant Count is therefore likely to rise*

Chart summary:

- Between March and July 2020, the number of people claiming out of work related benefits increased by 211.1% in Harrow, with numbers and rates stabilising somewhat over the summer. With the pandemic continuing and more business feeling the financial impact, out of work benefit claims do not look like falling in the short-term at least and may even increase further.
- April 2020 claimant count: 5720 or 3.6% (+3030 claims or +112.6% from April 2019)
 - London rate: 5% / Great Britain rate: 5.1%
- May 2020 claimant count: 10,425 or 6.6% (+7660 claims or +277% from May 2019)
 - London rate: 7.6% / Great Britain rate: 6.5%

¹⁹ Harrow Economic Recovery Impacts Dashboard – Economic Development & Research

- June 2020 claimant count: 10,820 or 6.8% (+7920 claims or +273% from June 2019)
 - London rate: 7.6% / Great Britain rate: 6.3%
- July 2020 claimant count: 10,810 or 6.8% (+7815 claims or +261% from July 2019)
 - London rate: 7.8% / Great Britain rate: 6.5%
- August 2020 claimant count: 11,185 or 7.1% (+8100 claims or +262% from August 2019)
 - London rate: 8% / Great Britain rate: 6.6%
- The claimant count in Harrow has remained slightly below the London rate, but slightly above the national rate (with the exception of April).
- The impact of increasing unemployment suggests the likelihood of more parents/carers being at home and not requiring childcare at least temporarily, and/or not being able to afford the cost of childcare provision.

Parent/carer behaviours: Once childcare settings were allowed to re-open to all children from 01 June 2020, many providers reported low rates of attendance. Provider and parent surveys were conducted to gauge parental concerns and why some were choosing not to use childcare or send their children back to their provision. Chart 8 reports the findings from feedback received:

Chart 8: Parental concerns and reasons for not using childcare

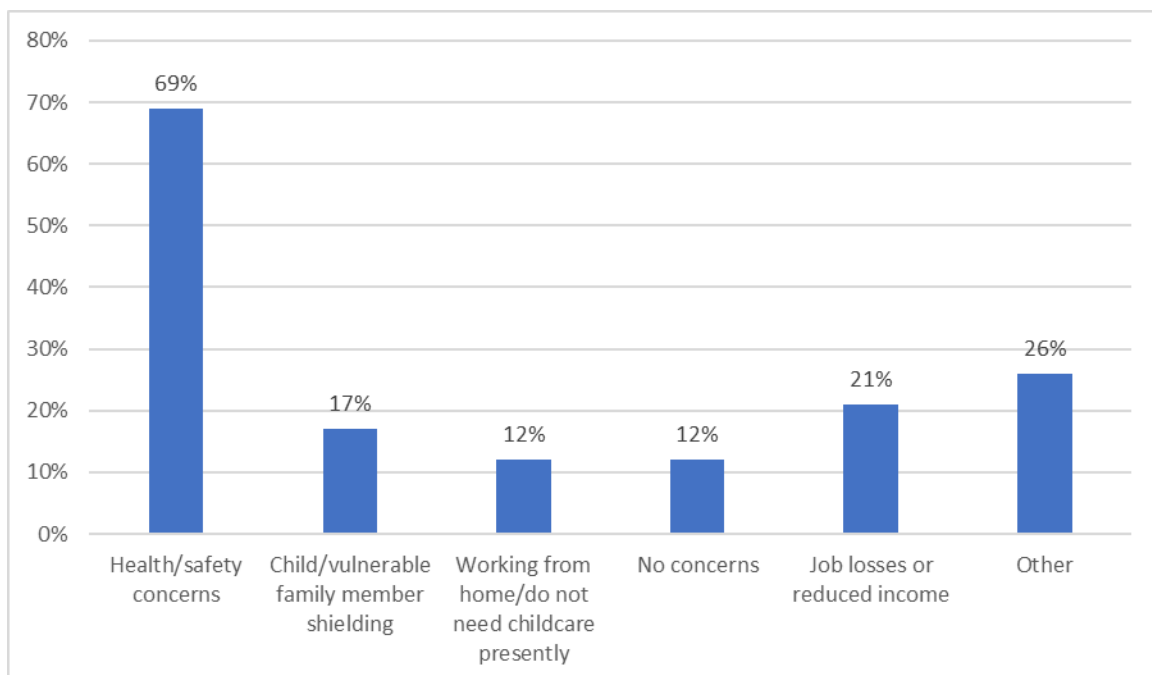


Chart Summary:

- Health and safety concerns were by far the greatest reason why parents/carers chose not to use childcare or delay their child’s return to childcare provision. Concerns over the spread of Covid-19 in childcare provision and the risk of then entering family homes has resulted in reduced demand for childcare.
 - Furthermore, nearly a fifth of respondents had children or vulnerable family members shielding from the virus, so were still wary of mixing and wanted to limit the risks of infection.

- A third of respondents cited economic factors as influencing their decisions on using childcare or not, with more parents able to provide childcare either because of working from home, job losses or lower income inhibiting the ability to afford it.
- Only 12% of respondents reported having no concerns in using childcare provision
- The 'Other' category included some of the following reasons:
 - Older siblings were still at home, so younger siblings kept at home too
 - Children starting school in September so decided not to send them back to their childcare setting for just a few weeks
 - Concerns of the virus disproportionately affecting BAME communities
 - Concerns it was too early to re-open childcare provision

The overall impact of the Covid-19 pandemic on demand for childcare has seen it reduce significantly, with early indications from autumn term funding figures and parent/provider feedback suggesting that it is increasing again, slowly. Close attention will continue to be paid to the changing levels of demand on a termly basis with continued provider and parent engagement. It is expected that as long as the pandemic and resulting government measures continue, levels of demand for childcare will be turbulent and continue to fluctuate. Looking further ahead, some increases in demand can be expected on a localised or ward level as a result of new housing and regeneration projects, such as those in Wealdstone and central Harrow.

Supply of childcare

The number of early years providers and places in Harrow is baseline data of the theoretical supply of childcare available in normal circumstances. The actual supply of childcare recorded during and after the national lockdown is presented later in this section.

Number of early years providers and places

In total, there are 281 childcare providers in Harrow, offering a maximum of 7,380 early years childcare places.

Table 7: Number of early years providers and places

Type of provision	Number of providers	Number of registered places
Childminders*	138	837
Nursery classes in schools	28	1430
Maintained nursery schools	1	81
Private, voluntary and independent nurseries	114	5032
Total:	281	7380

*The data in this table was correct on: 01 May 2020. * Some childminder places may also be available for older children.*

For private, voluntary and independent nurseries and childminders, the number of registered places represents the maximum number of children who can be on the premises at any given time. In practice, many providers choose to operate below their number of registered places. Children may attend childcare full time or part time. The table above records places for children who are attending full time, or for as many hours as the setting is open. In some cases, two or more children attending part time may use one full time equivalent place. For example, one child may attend in the morning and one child may attend in the afternoon.

Table 7 Summary:

- Nursery classes in schools and maintained nursery schools offer 20.5% of all registered early years childcare places available in Harrow; however these places are for 3 and 4 year olds only.
- The private, voluntary and independent (PVI) sector, offer the remaining 79.5% of early years childcare places, which are available across the early years age group (0-4 year olds). The PVI sector includes day nurseries (open through the day), pre-school/playgroups (open part-time), independent school nurseries and Ofsted registered childminders.
- Year on year, there has been a reduction of 8 early years providers all of which were from the PVI sector (mainly childminders), as displayed in table 8.
- Whilst the total number of early years providers has reduced slightly, the number of registered places available has increased by 79 year on year. All changes occurred within the PVI sector.

Harrow had a total of 5,869 early year's childcare places for children within the PVI sector as of May 2020. These places are available through:

- 73 day nurseries making available 3,693 places for children aged 0-4 years (62.9% of all PVI places) and 34 playgroups/ pre-schools making available 1025 places for children aged 0-4 years (17.5% of all PVI places).
- 138 childminders making available 837 places for children aged 0-4 years (14.3% of all PVI places).
- 7 independent schools with under 5's nurseries making available 314 places for children aged 0-4 years (5.3% of all PVI places).

An overview of the location of early year's settings in Harrow is mapped in Figure 1.

Table 8: Number of PVI providers and places by year

Provision type	2019		2020	
	Number	Places	Number	Places
Day Nursery	69	3531	73	3693
Pre-school/Playgroup	35	1050	34	1025
Childminders	149	895	138	837
Independent School Nursery	7	314	7	314
Total:	260	5790	252	5869

It is important to note, that the number of places are based on full-time equivalent places. Some places are sessional so 1 full-time place could in theory serve 2 children.

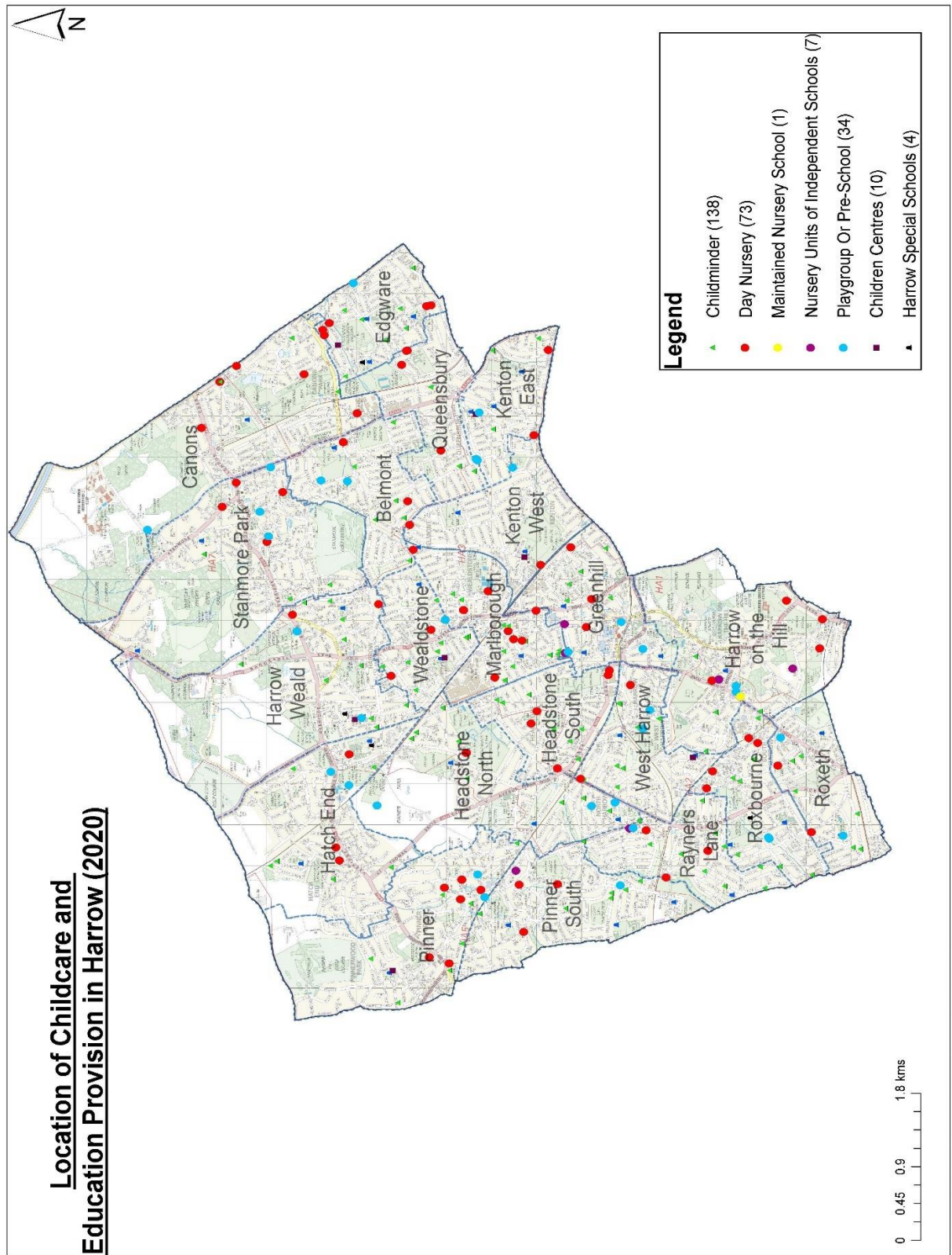
Table Summary:

- The total number of PVI providers in Harrow has reduced by 8 in the past year. This continues the trend of declining numbers since 2015.
 - There has been a reduction of 1 pre-school/playgroup and 11 childminders in the past year.
 - Growth in the number of day nurseries has continued with an increase of 4 providers within the past year.
 - There has been no change to the numbers of independent school nurseries.

- Whilst the total number of PVI providers continues to decrease, the overall number of places available within them continues to increase slowly. There has been an increase of 79 childcare places between 2019 and 2020, representing 1.3% overall growth in the past year, further to 1.5% growth between 2018 and 2019:
 - 4.4% increase in the number of places available within day nurseries.
 - 2.4% decrease in the number of places available within preschool/playgroups.
 - 6.5% decrease in the number of places available within childminding settings.
 - No change to the number of places available within independent school nurseries.

- Over the past year, day nurseries have seen a 1.9% increase in their overall share of places available within the PVI market. Conversely the market share of pre-school/playgroup and childminding places available continues to fall.

Figure 1: Location of early years settings in Harrow



Ward Overview

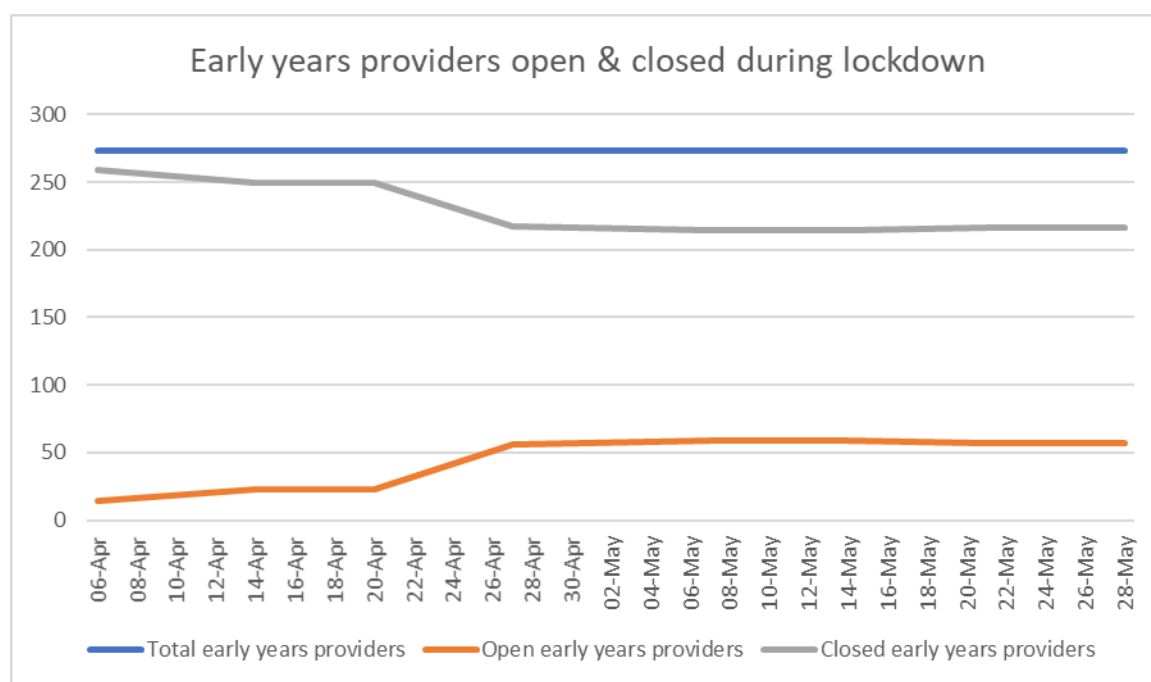
In the full Childcare Sufficiency Assessment produced in 2018, a ward analysis of the supply of PVI childcare was carried out, identifying provider numbers, places and types by ward. This is reviewed in each annual update. A brief overview, summarising the key findings and any changes identified since the 2019 annual update is provided below:

- The wards with the largest supply of PVI childcare places remain largely unchanged:
 - Marlborough, Edgware, Pinner and Pinner South. However, Greenhill is now joined by Stanmore Park and Hatch End with comparable figures, due to growth in the number of places in these two wards over the past year.
 - Marlborough remains the ward with the highest number of places.
 - 5 out of 7 of these wards are located in central and west Harrow, however the geographical spread of wards with the greatest supply of places is widening.
- The wards with the lowest supply of PVI childcare places has changed slightly:
 - Queensbury, Wealdstone and Canons still have some of the lowest supply, however Kenton West and Harrow Weald have replaced West Harrow and Roxeth as wards with some of the fewest places over the past year.
 - Queensbury is the ward with the lowest number of places.
 - These wards can generally be found in the north and east of the borough
- Of the 21 Harrow wards, 11 experienced growth in the supply of PVI childcare places and 6 experienced losses, with the remaining 4 wards remaining unchanged.
- There is no identifiable pattern to the location of those wards which experienced growth or losses over the past year.
- The changes in the supply of places were generally insignificant, with the exception of substantial growth in West Harrow and substantial losses in Kenton West:
 - Wards with the largest annual percentage growth:
 - West Harrow: 51 places (24.4% growth)
 - Hatch End: 60 places (15.5% growth)
 - Canons: 18 places (11.4% growth)
 - Wards with the largest annual percentage reduction:
 - Kenton West: 75 places (39.5% reduction)
 - Harrow Weald: 25 places (12.9% reduction)
 - Marlborough: 36 places (6.9% reduction)
- The wards with the lowest number of PVI childcare providers remain as Kenton West with 3 providers (2 fewer than last year) and Queensbury with 4 providers.
- Most wards contain childminders, day nurseries and pre-schools, offering a choice of provider types for parents/carers. However, Queensbury, Headstone South and Marlborough have no pre-schools operating and Kenton West no longer has any childminders operating.

Supply of childcare during the Covid-19 national lockdown

Further to the analysis of demand for childcare by key worker and vulnerable children during the Covid-19 national lockdown (23 March to 01 June 2020), this section reviews the supply of early years childcare provision available to cater for this demand. This involved childcare providers opening for the above cohort of children only. Providers assessed how many key worker and vulnerable children attended their settings and if it was feasible to stay open for them and potentially accept more children from closed settings, via brokerage provided by the local authority. This was only viable for the minority of PVI settings that were more financially stable.

Chart 9: Supply of early years provision during national lockdown²⁰



Figures exclude independent school nurseries and the sole maintained school nursery in Harrow, which were reported separately with school data

Chart Summary:

- A peak of 59 early years providers were open for key worker and vulnerable children by early May. This represents 21.6% of the market (273 providers).
- National comparative data shows that 36% of early years providers in England were open during the same time period in early May²¹
- 23 providers were open during the Easter holidays (06-20 April 2020), increasing thereafter. By May, the number of open providers plateaued until the end of the lockdown.
- There were sufficient places for all key worker and vulnerable children who needed one, as reported in every DfE data return during the national lockdown.

²⁰ Harrow DfE returns analysis

²¹ <https://www.gov.uk/government/publications/coronavirus-covid-19-attendance-in-education-and-early-years-settings>

Chart 10: Supply of early years provision during lockdown by provider type²²

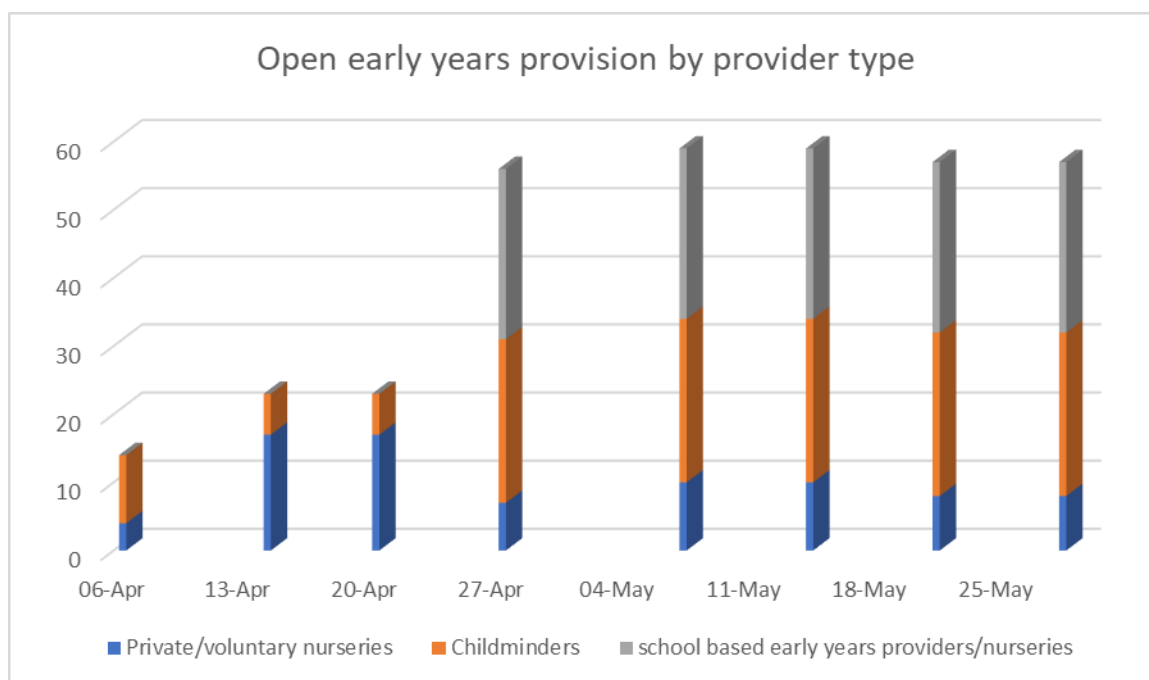


Chart Summary:

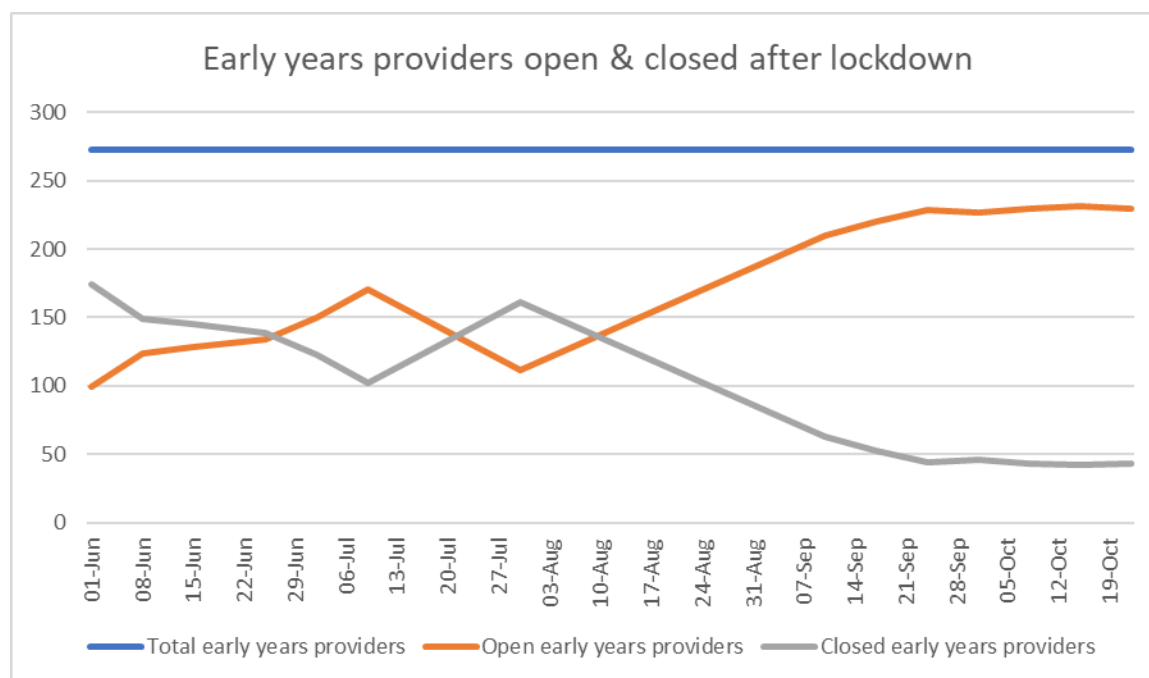
- School based early years providers (nursery classes) were closed during the Easter holidays, so available supply of early years provision comprised of private/voluntary nurseries and childminders during this time.
- Following the Easter holidays, the majority of school-based provision re-opened and the number of childminders that were open increased. However, the number of private and voluntary nurseries that were open declined:
 - A peak of 17 or 16% of private and voluntary nurseries were open in April during the Easter holidays.
 - A peak of 25 or 89% of school based early years providers (nursery classes) were open by early May.
 - A peak of 24 or 17% of childminders were open by early May.
- As of 07 May, when the maximum number of early years providers were open during lockdown, the proportion of each provider type was:
 - 42.4% school based early years providers (3.2% higher than it's proportion of the total market)
 - 40.7% childminders (9.8% lower than it's proportion of the total market)
 - 16.9% private and voluntary nurseries (6.6% higher than it's proportion of the total market)

²² Harrow DfE returns analysis

Supply of childcare after the national lockdown

The supply of childcare continued to be tracked closely and reported to the DfE after 01 June 2020, when early years childcare providers were permitted to re-open for all children. Chart 11 tracks the supply of early years childcare provision from the second half of the summer term and through the first half of autumn term 2020.

Chart 11: Supply of early years provision after national lockdown²³



Figures exclude independent school nurseries and the sole maintained school nursery in Harrow, which were reported separately with school data

Chart Summary:

- As of 01 June 2020, when early years provision was permitted to re-open for all children, a total of 99 out of 273 providers or 36.3% of the total market was open.
- By the end of June, the number of providers that were open exceeded the number that were closed.
- By 09 July, the number of providers open reached a peak of 171 for the summer term, or 62.6% of the total market. Nationally, 62% of early years providers in England were open on this date²⁴, on par with the figure for Harrow.
- Over the summer holidays, more providers were closed than open, which is not unusual as school nurseries close along with many private pre-schools and childminders. An average of 112 providers or 41% of the market remained open.
- Growth in the numbers of providers re-opening during the second half of the summer term, continued into the autumn term, as tight restrictions on providers operating in small bubbles were relaxed at the end of the summer term, and increased parental confidence possibly drove renewed demand for childcare places:
 - By 10 September, 210 providers or 77% of the total market was open.

²³ Harrow DfE returns analysis

²⁴ <https://www.gov.uk/government/publications/coronavirus-covid-19-attendance-in-education-and-early-years-settings>

- By 15 October, 231 providers or 84.6% of the total market was open. Nationally, 80% of early years providers in England were open on the same date²⁵, almost 5% behind the figure for Harrow.

Chart 12: Supply of early years provision after lockdown by provider type²⁶

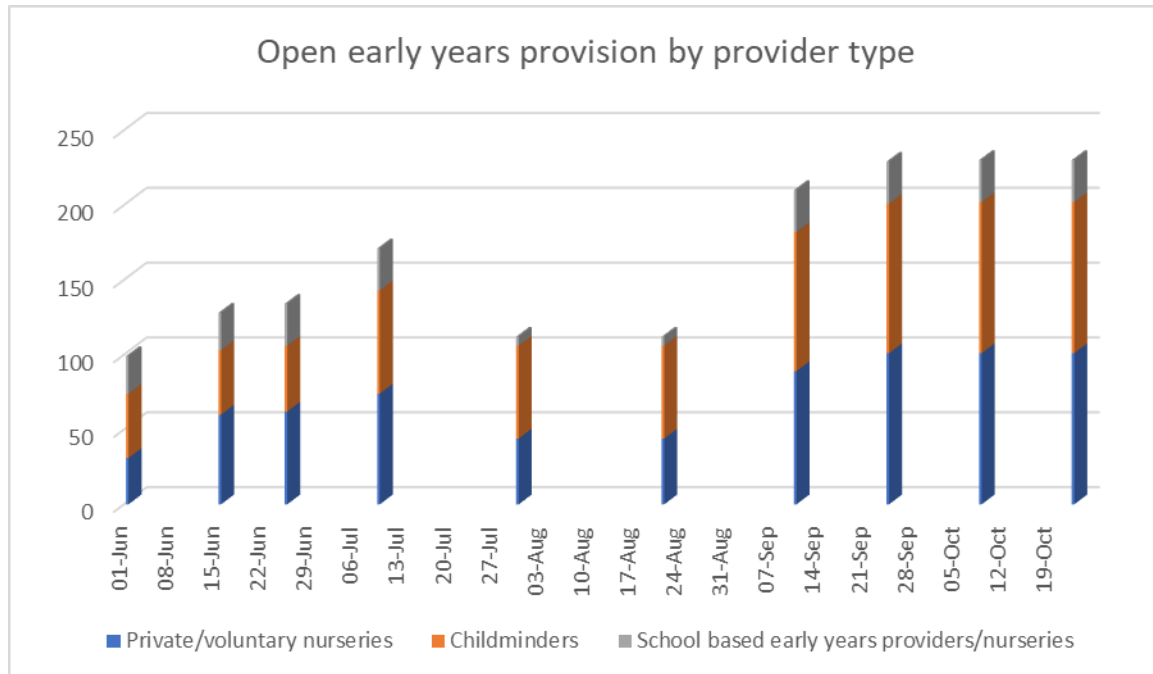


Chart Summary:

- Following the re-opening of early years provision to all children for the second half of the summer term from 01 June:
 - 31 or 29% of private and voluntary nurseries were open. This rose to a peak of 74 providers or 69% by 09 July.
 - 43 or 31% of childminders were open. This rose to a peak of 69 childminders or 50% by 09 July.
 - 25 or 89% of school based early years providers were open. This rose to a peak of 28 providers or 100% by 25 June.
- During the summer holidays, the proportion of the 112 providers remaining open consisted of:
 - 39.3% private and voluntary nurseries
 - 55.4% childminders
 - 5.3% school based early years providers
- During the first half of the autumn term, by 10 September:
 - 89 or 83% of private and voluntary nurseries were open. This rose to a peak of 102 providers or 95% by 15 October.
 - 93 or 67% of childminders were open. This rose to a peak of 101 childminders or 73% by 01 October.
 - 28 or 100% of school based early years providers were open and remained open.

²⁵ <https://www.gov.uk/government/publications/coronavirus-covid-19-attendance-in-education-and-early-years-settings>

²⁶ Harrow DfE returns analysis

- As of 15 October, when the maximum number of early years providers were open during the first half of the autumn term, the proportion of each provider type was:
 - 44.2% private and voluntary nurseries (5% higher than it's proportion of the total market)
 - 43.7% childminders (6.8% lower than it's proportion of the total market)
 - 12.1% school based early years providers (1.8% higher than it's proportion of the total market)

Early years vacancies

Table 9: Early years vacancies

Type of provision	Number of providers	Number of providers with vacancies
Childminders	138	29
Nursery classes in schools	28	21*
Maintained nursery schools	1	1
Private, voluntary and independent nurseries	114	48

Data in this table was correct on 06 March 2020. In normal circumstances data would be from 01 May, however providers were closed due to lockdown. *As reported in the School Census January 2020

A vacancy is a place that could realistically be used by a child and can be full or part-time. Vacancy rates are a snapshot, and often change rapidly. In some cases, providers may have a vacancy which is only available for a specific age group, or for a particular part-time arrangement. (We ask providers to report vacancies to us so we can help promote them. Not all choose to do this, so vacancy rates may be higher than recorded). In general, vacancy rates are higher in the autumn, when many children move to school.

Table Summary:

- 21% of childminders reported having vacancies available.
- 75% of nursery classes in schools had vacancies available in January 2020. Several of these only had one or two places available and were close to capacity
- Vacancies were available within the one Harrow maintained nursery school.
- 42% of private, voluntary and independent nurseries reported having vacancies available.
- 35% of all early years providers reported having vacancies, 3% higher than recorded in the 2019 sufficiency assessment, mainly due to a 4% increase in the proportion of private, voluntary and independent nurseries reporting vacancies.

Table 10: Vacancies in the PVI sector after the national lockdown

Type of provision	Number of providers	Number of providers with vacancies	
		June 2020	Sept 2020
Childminders	138	32	56
Private, voluntary and independent nurseries	114	42	57

Table Summary:

- Vacancy rates were largely unchanged when providers were permitted to re-open for all children in June. However, some providers remained closed until the autumn term, or had to manage existing cohorts of children in small bubbles, restricting them from advertising places. Therefore, the proportion of providers reporting vacancies was likely higher than before lockdown.
- Vacancy rates increased significantly as the autumn term began in September as more providers re-opened and tighter restrictions on operating in small bubbles were relaxed:
 - 41% of childminders reported having vacancies available, a 20% increase from before lockdown
 - 50% of private, voluntary and independent nurseries reported having vacancies available, an 8% increase from before lockdown
- This increase in capacity and reported vacancies can partly be explained by falling demand for childcare places, due to parental concerns over safety relating to the Covid-19 pandemic. However, some of the increase may also be due to vacancy rates traditionally being higher in autumn anyway, when places are freed up by children moving onto school nursery or reception class.

Number of school age providers and places

In total, there are 53 providers of childcare for school age children during term time, and 14 providers of childcare for school age children during the holidays. There are also 138 childminders who may provide care for school age children.

Table 11: Number of school age providers and places

Type of provision	Number of providers	Number of registered places
Breakfast club – primary school	15	456
After-school club – primary school	27	881
Breakfast club – secondary school	3	140
After-school club – secondary school	2	150
Breakfast club – other	1	40
After-school club – other	5	181
Childminders	138	837
Holiday club	14	588

Tracking supply of childcare for school age children is difficult because not all of this type of provision is registered with Ofsted. Some schools may also have out of school club provision under the school's own Ofsted registration. Most of these clubs are only available to children attending the schools and therefore they do not wish to promote or advertise these places outside of the school. Therefore, it is possible that we have under-counted the provision of breakfast and after school clubs and holiday clubs.

Table 11 Summary:

- The majority of breakfast and after school clubs operate within primary schools, catering for primary school aged children, with significantly lower availability within secondary schools. There have only been very slight changes to school age childcare provision over the past year, summarised below:
 - The number of childcare providers for school age children remains the same as reported in 2019 at 53. The number of registered places across these providers has reduced by 1.4% over the past year:
 - 10.2% reduction of places in breakfast clubs operating in primary schools
 - 2.8% growth in places in after school clubs operating in primary schools
 - No changes to the number of places available in breakfast and after school clubs in secondary schools or other sites
- The number of childminders and places available has reduced over the past year, potentially affecting the availability for school aged children.
- There are 14 Ofsted registered holiday clubs in Harrow offering childcare places for school aged children. 2 new providers have opened over the past year with 29% growth in places available. Parents may also use provision which is not considered 'childcare', for example sports or arts clubs, after school or in the holidays.

Supply of school age provision after the national lockdown

School age childcare provision has been affected by the Covid-19 pandemic in similar ways to early years childcare provision, with closures during the national lockdown and restrictions on how they operate safely upon re-opening and going forward²⁷. Holiday playschemes were contacted to ascertain whether they were running during the summer holidays, and out of school club providers were contacted in September, to ascertain whether they would be operating during the autumn term. The key findings were:

- 10 out of 14 holiday playschemes confirmed they were running during the summer holidays, with 3 providers confirming they were closed due to the pandemic or risk assessments were still ongoing, and 1 provider could not be reached:
 - Of the 10 playschemes that were operating, 3 reported that they ran with reduced capacity or facilities.

²⁷ <https://www.gov.uk/government/publications/protective-measures-for-holiday-or-after-school-clubs-and-other-out-of-school-settings-for-children-during-the-coronavirus-covid-19-outbreak/protective-measures-for-out-of-school-settings-during-the-coronavirus-covid-19-outbreak>

- 41 providers or 77% of school age childcare provision (breakfast and after school clubs) confirmed they will be operating during the autumn term in some capacity:
 - 3 providers confirmed they would either be running at reduced capacity and in small bubbles or on alternate days for different year groups.
 - Out of the 12 providers who confirmed they are closed, 4 reported they would be reviewing plans and potentially re-opening later in the school term.
 - The limited provision in secondary schools looks to be worst affected by the pandemic. 4 out of the 5 providers operating in secondary schools confirmed they will remain closed with one provider suggesting they may re-open later in the term.
 - 2 of the 6 providers on non-school based locations confirmed they will remain closed for the foreseeable future due to church and community centre premises staying closed and not permitting them to return.

Impacts of Covid-19 on the supply of childcare

The early years and childcare market has had to navigate the challenges posed by the Covid-19 pandemic and associated government response and continues to do so. Temporary closures during the national lockdown, subsequent restrictions on how to operate and depleted demand for childcare provision have all impacted upon the sustainability of the market and what it might look like going forward.

- *Provider openings and closures:* All of the following providers that have opened or closed during the pandemic have occurred between May and October 2020, and are not included in the supply figures reported in this assessment:
 - *PVI nurseries:* 1 pre-school has closed directly as a result of the pandemic, citing personal health concerns and low demand as the reason for closing. The pre-school was in Edgware ward which has some of the highest levels of childcare provision in the borough, so sufficiency should remain largely unaffected. 2 new day nurseries have opened, increasing the supply of places in this sector. Overall, there has been a net gain of 1 PVI nursery during the pandemic to date.
 - *Childminders:* 11 childminders have been lost. 4 moved borough and of the remaining 7, most were considering closing anyway, but the pandemic helped cement their decisions to close. 4 new childminders have opened during the same period, resulting in a net loss of 7 childminders during the pandemic to date.
 - *School aged childcare:* 2 primary school based out of school clubs have closed. Reasons for closure are unknown. 1 new holiday playscheme has opened.

- *Operational challenges:* Childcare providers had to carry out thorough risk assessments and adapt to new government guidelines on how to operate safely upon re-opening in June. This presented it's own challenges in regards to sustainability²⁸:
 - Between 01 June and 20 July, early years providers were required to keep children in small consistent groups or bubbles, with individual staff assigned to a specific group, aimed at limiting mixing. As much outdoor play/learning as possible was also encouraged. Smaller settings or those based in one room were particularly affected. This limited group sizes and potential income for providers, who had already suffered financial losses during the national lockdown.
 - Since 20 July, providers have been able to return to normal group sizes, whilst considering how they will minimise mixing, for example by keeping different age groups apart or in different rooms/areas if possible. In smaller settings this would still be difficult to achieve and therefore group sizes may still have been restricted, impacting on income.
 - Providers were responsible for managing confirmed cases of Coronavirus in their settings, by sending infected children and staff home, and advising those who had been in close contact to self-isolate for 14 days. Incidents have been reported in several early years childcare settings to date, who have had to close certain rooms, or in few cases temporarily close the whole setting. Such upheaval and uncertainty also impacts on business development and sustainability.
 - Providers have also had to implement protective measures within their settings to make them Covid-safe as far as practicable. This involved stringent and regular cleaning of premises, equipment and resources. Although providers were offered starter packs of personal protective equipment (PPE) by the local authority, it was a limited amount and therefore providers have had to shoulder the costs for some of their PPE and all cleaning resources, thus impacting them further financially.
 - There are 4 PVI nurseries that remain closed to date, as they are located in properties owned by Harrow council housing services. Delays in council risk assessments have prevented them from opening, but the importance of the process being sped up has been stressed.

- *Provider concerns:* Surveys were undertaken during the summer to gauge feedback from early years childcare providers (PVI nurseries and childminders) on what they viewed as the main concerns and challenges looking ahead. Chart 13 reports the findings from feedback received:

²⁸ <https://www.gov.uk/government/publications/coronavirus-covid-19-early-years-and-childcare-closures/coronavirus-covid-19-early-years-and-childcare-closures>

Chart 13: Provider concerns resulting from the Covid-19 pandemic

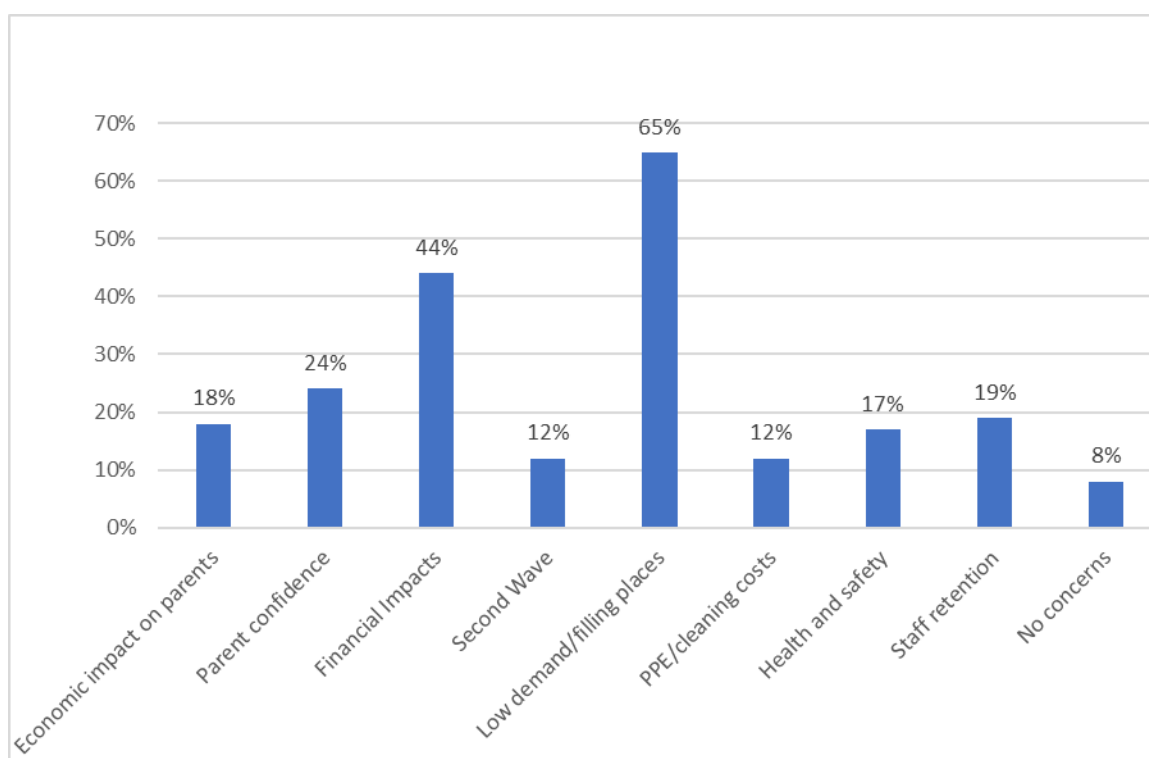


Chart Summary:

- The key concern reported by providers was low demand and difficulty in filling places. Almost two thirds of respondents confirmed this was an issue due to problems with the retention of existing children, attracting new enrolments and/or parents requiring fewer hours of childcare.
- Just under half of all respondents cited financial impacts of the pandemic as being a major concern, having lost income during and after lockdown especially from fee-paying parents. A few respondents reported that if the situation did not improve by the new year, the worst-case scenario would be the possibility of closure.
 - A further 12% of respondents were concerned about PPE and cleaning costs which have added to their financial burden.
 - 15% of PVI nursery respondents to the provider survey, confirmed they had experienced an increase in letting or premises fees, or were expected an increase from autumn. Although some of these are annual hikes, the ability to afford them has become more problematic due to financial insecurity.
- Nearly a quarter of respondents were worried about how parent confidence has been impacted by Covid-19, with reservations on using childcare due to safety concerns and the risk of virus transmission.
 - In addition, almost a fifth of respondents were concerned about the economic impact of the pandemic and government lockdown on parents/carers. With many parents/carers losing jobs, being furloughed or working from home, the concern is that the requirement for childcare would reduce and/or the ability to afford childcare would be impacted.
- Fewer than a fifth of respondents reported a second wave of Covid-19, health and safety practicalities within settings and staff retention as cause for concern. Issues

around staff retention were mainly based around costs of keeping them employed and staff going into isolation if they contract Coronavirus.

- Only 8% of respondents reported having no concerns.
- Providers were also asked if they would be open in the autumn term, to which 100% confirmed they would either be fully or partially operating. The actual supply of childcare after lockdown and into the autumn term is reported earlier in this section.

The impacts of the Covid-19 pandemic on the supply of childcare must be tracked closely as the situation is on-going and continues to evolve. To date, the supply of childcare in Harrow has been sufficient to meet levels of demand through and after the national lockdown. Looking ahead, support and government funding arrangements for the early years and childcare sector are yet to be confirmed for the spring term 2021 and beyond. This uncertainty, together with impacts on demand for childcare and financial fragility for many in the early years and childcare sector, suggests a volatile time for the sustainability of the market.

Funded early education

Proportion of 2 year old children entitled to funded early education

In Harrow, 25% of 2 year olds are entitled to funded early education, 1.2% lower than the previous year. This equates to around 915 children per year in 2019.

Take up of funded early education

The proportion of eligible children taking up their funded place (for at least some of the available hours) in Harrow is displayed in Table 12.

Table 12: Proportion of eligible children taking up their funded place in Harrow²⁹

Age	% of eligible children	
	2019	2020
Age 2	57%	55%
Age 3 and 4	87%	88%
3 year olds	83%	84%
4 year olds	93%	91%

*The DfE 2019 figure has been revised up by 1% for 4 year olds since the figure presented in the 2019 annual update

Table Summary:

- 55% of eligible 2 year olds are taking up their funded place, leaving 45% who are not accessing their entitlement (*The 55% take-up figure is taken from Harrow funding headcount data as it is more current and accurate than the 53% take-up rate listed by the DfE*). There has been a 2% decrease in take-up since 2019.

²⁹ Department for Education: Provision for children under 5 years of age January 2020 & Harrow early education funding headcount data

- 88% of eligible 3 and 4 year olds are taking up their funded place, 1% up on 2019.
12% of 3 and 4 year olds are not accessing their entitlement
 - 16% of 3 year olds are not taking up their funded place
 - 9% of 4 year olds are not taking up their funded place

It should be noted that a proportion of those children not accessing their funded entitlements in Harrow, may well be doing so out of borough. Previous analysis of 3 and 4 year old funded take-up indicated that more Harrow children were taking up their entitlement out of borough than out of borough 3 and 4 year olds accessing their funded places in Harrow. It should also be noted that nursery attendance is not compulsory.

Table 13: Regional and national take up comparisons³⁰

Age	Take-up: % of eligible children							
	Harrow		Outer London		London		England	
	2019	2020	2019	2020	2019	2020	2019	2020
Age 2	57%	55%	56%	60%	56%	59%	68%	69%
Age 3 and 4	87%	88%	88%	87%	85%	84%	93%	93%
3 year olds	83%	84%	85%	84%	82%	82%	92%	91%
4 year olds	93%	91%	90%	90%	87%	87%	95%	94%

**some of the outer London and London 2019 figures for 3 and 4 year olds have been revised up by a percent or two from the figures presented in the 2019 annual update*

Table Summary:

- **2 year olds:** Take up of funded places in Harrow had risen above regional comparators in 2019 but has fallen by 2% over the past year, while take-up for outer London and London has increased. It is now running below both regional comparators and the national average:
 - 5% below the outer London borough average (which has increased by 4%)
 - 4% below the London average (which has increased by 3%)
 - 14% below the national average
- **3 and 4 year olds:** Take up of funded places in Harrow has increased by 1% since 2019 and remains above both the London and outer London averages. However it remains below the national average:
 - 1% above the outer London borough average
 - 4% above the London average
 - 5% below the national average
- **3 year olds:** Take-up of funded places in Harrow remains above the London average and is the same as the outer London average. However, it remains below the national figure:
 - On par with outer London average
 - 2% above the London average
 - 7% below the national average

³⁰ Department for Education: Provision for children under 5 years of age January 2020 & Harrow early education funding headcount data

- **4 year olds:** Take-up of funded places in Harrow remains above the outer London and London averages, but below the national average:
 - 1% above the outer London borough average
 - 4% above the London average
 - 3% below the national average

Providers offering funded early education places

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

Table 14: Providers offering funded early education places

Type of provision	Number of providers	Age 2 targeted	Age 3 and 4 universal 15 hours	Age 3 and 4 extended 30 hours
Childminders	138	41%	51%	47%
State school nurseries	28	0%	100%	43%
Maintained nursery schools	1	100%	100%	100%
Private, voluntary and independent nurseries	114	80%	100%	76%

Table Summary:

- **2 year old funding:** There are 148 childcare providers offering 2 year old funded places across all provision types, an increase of 8 providers year on year:
 - 100% of maintained nursery schools (1 provider)
 - 80% of PVI nurseries (91 providers): no change in percentage year on year
 - 41% of childminders (56 providers): 7% increase in the childminder provider base year on year
 - 0% of state school nurseries (0 providers)
- **3 and 4 year old universal 15 hours:** There are 214 providers offering 3 and 4 year old funded places for the universal 15 hours across all provision types, an increase of 5 providers year on year:
 - 100% of maintained nursery schools (1 provider)
 - 100% of PVI nurseries (114 providers)
 - 100% of state school nurseries (28 providers)
 - 51% of childminders (71 providers): 5% increase in the childminder provider base year on year
- **3 and 4 year old extended 30 hours:** There are 165 providers offering 3 and 4 year old funded places for the extended 30 hours across all provision types, an increase of 19 providers year on year:
 - 100% of maintained nursery schools (1 provider)
 - 76% of PVI nurseries (87 providers): 7% increase in the PVI provider base year on year

- 43% of state school nurseries (12 providers): 4% increase in the state school nursery provider base year on year
- 47% of childminders (65 providers): 9% increase in the childminder provider base year on year

Extended entitlement – 30 hours funding

There have been three academic years or nine school terms since the national roll-out of the extended hours (30 hours) entitlement in September 2017. The entitlement targeted working parents, enabling those that qualify to claim an additional 15 extended hours in addition to the universal 15 hours entitlement.

When applying online via the Government’s Childcare Support website, eligible parents are issued with eligibility codes, which they give to childcare providers in order for them to validate and claim the extended hours funding. Data previously supplied by the DfE on the number of eligibility codes issued and validated has ceased to be available since the summer term 2019. Therefore, focus will now only be possible on the number of 3 and 4 year olds accessing an extended hours place. Table 15 compares take-up of extended hours places over the past two academic years:

Table 15: Extended hours take-up in Harrow³¹

School term	Children accessing an extended hours place
Autumn 2018	718
Spring 2019	993
Summer 2019	1167
Autumn 2019	787
Spring 2020	1064
Summer 2020*	1224

Table Summary:

- Children accessing an extended hours place:
 - autumn 18 to autumn 19 - 9% increase
 - spring 19 to spring 20 - 7% increase
 - summer 19 to summer 20 - 5% increase
- When comparing like for like school terms, for example autumn 2019 with autumn 2018, there continues to be growth in the number of children accessing an extended hours place. However, the rate of growth has slowed when compared with the first two years after roll-out. Three years have now elapsed since roll-out, with the entitlement having had time to bed in and parental awareness being more widespread, so a slowdown in the rate of growth is to be expected.
- Nationally 345,704, 3 and 4 year olds were benefitting from the extended early education entitlement, based on the January 2020 early years census,

³¹ Harrow early education funding headcount data

up 5% from the previous year³². In comparison, figures from the same (spring) term in Harrow show a 7% increase from the previous year, 2% higher than the national rate of growth in take-up.

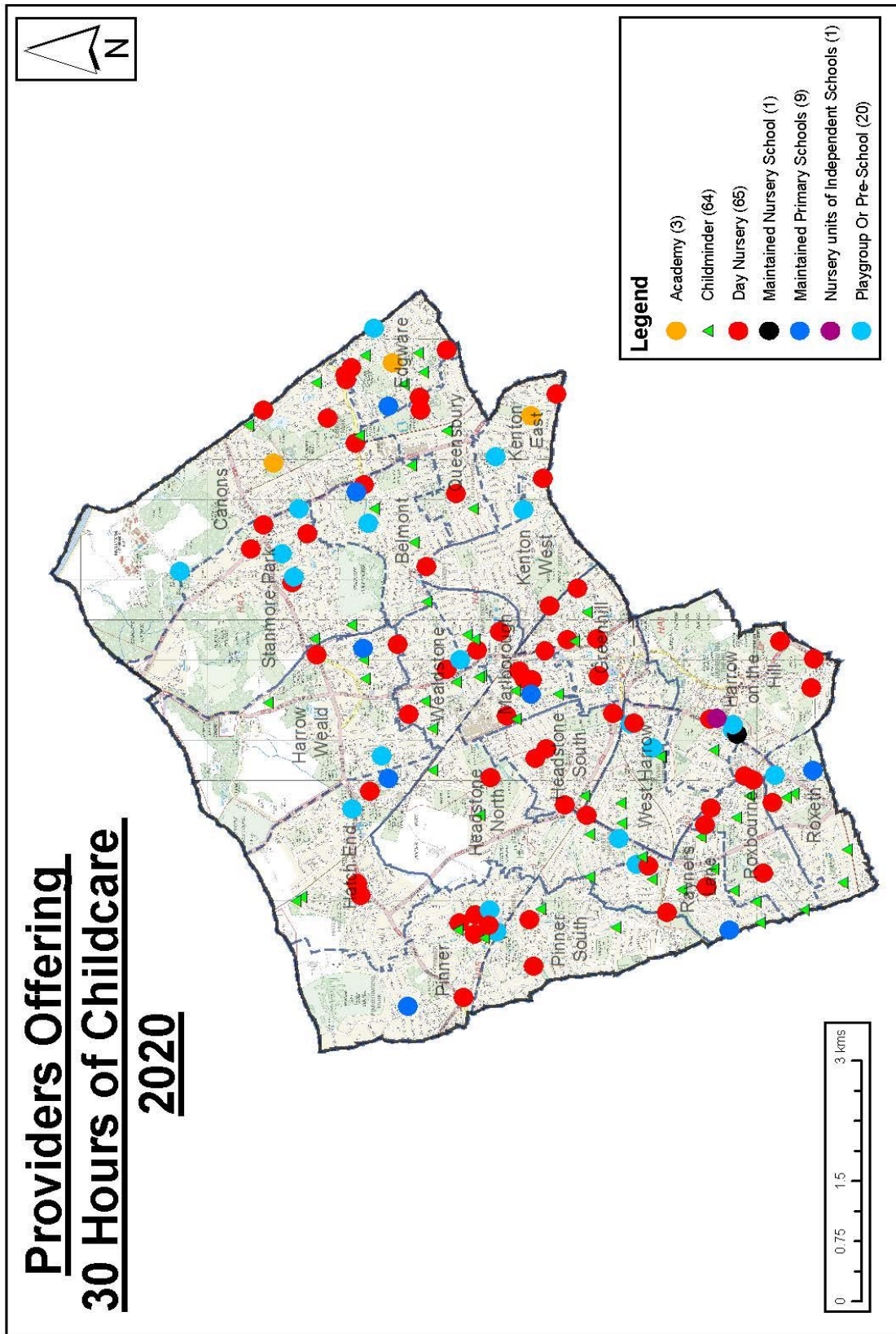
- *It should be noted that the take-up figures for the summer term 2020 will have been affected by the closure of early years settings at the end of March 2020 until 01 June 2020, due to the Covid-19 pandemic. However, the take-up figure is probably not far off what was to be expected, as all eligible children funded in the spring term were also funded in the summer term (regardless of closure), along with any new children that provider's had registered to join in the summer term. Most eligibility codes would have been accessed and places arranged for the summer term prior to the closure of settings, as the deadline for summer term 30 hour code applications was 31 March.

Providers offering extended hours

There are 163 providers offering approximately 1363, 30 hour or extended hour places as at May 2020, an increase of 16 providers and 62 places in the past year. The providers are mapped on Figure 2.

³² Department for Education: Provision for children under 5 years of age January 2020

Figure 2: Map of providers offering extended hours places (30 hours)



Impacts of Covid-19 on funded early education

This section of the annual sufficiency update looks to identify impacts on funded early education entitlements as a result of the Covid-19 pandemic, the closure of early years settings for the majority of children in late March 2020 and the conditional re-opening of settings from June 2020. It must be noted that the emergency is ongoing, and therefore impacts on funded early education are also ongoing and will have to be tracked closely looking ahead as more termly data becomes available.

Government and DfE response

- All early years childcare settings and schools were instructed to close by the government from 20 March 2020 due to the Covid-19 pandemic, subsequent lockdown and strict social distancing measures. Take-up of early education funding entitlements were unaffected in the spring term 2020 as the above measures were announced towards the end of term and funding had already been claimed and delivered. Providers were informed that the funding would be unaffected.
- Although only key worker and vulnerable children could access childcare provision during lockdown, the DfE confirmed that funding arrangements for the summer term 2020 would be safeguarded so that providers would continue to receive the 2, 3 and 4 year old funding entitlements even while closed³³.
- Guidance on use of the free entitlements was also published and updated through various stages of the pandemic response³⁴. This helped inform local authority strategy and delivery of the funding entitlements. During lockdown, funding for key worker and vulnerable children had to be delivered wherever provision was available. Some children had to move to a new provider on a temporary basis as their existing provision was closed. Funding followed the child. This meant some providers would lose out on funded places.
- In normal circumstances the autumn term 2020 funding allocation for local authorities would be based on the January 2021 census. In July, the DfE acknowledged that the number of children attending childcare may not have returned to normal levels by January 2021, and therefore confirmed the allocation would be based on the January 2020 census count. This allowed local authorities to fund providers to the same levels as would usually be expected if the Covid-19 pandemic had not occurred. Guidance also stipulated that providers could continue to be funded in the autumn if they had no choice but to close due to public health reasons, however if settings were closed for any other reasons, they should not be funded.
- Funding arrangements are expected to return to normal by the spring term 2021, although subject to change depending on future developments.

Actions taken by Harrow

- Regular communications with funded childcare providers, sharing the latest DfE guidance on funding entitlements and local arrangements.
- The summer term funding arrangements were adapted to meet the pressing financial needs of early years childcare providers, who by this time could only open for key

³³ <https://www.gov.uk/government/news/free-childcare-offers-to-continue-during-coronavirus-closures>

³⁴ <https://www.gov.uk/government/publications/use-of-free-early-education-entitlements-funding-during-the-coronavirus-outbreak/use-of-free-early-education-entitlements-funding-during-coronavirus-covid-19>

worker or vulnerable children. Many settings remained closed and income from fee-paying parents was all but lost, therefore making the early education funding entitlements even more vital. Funding for all existing eligible children carried over from the spring to the summer term was secured. 100% payment for these children was made by the beginning of the term, as opposed to the usual 50% interim payment, with the balance paid as a final payment later in the term. This secured at least some financial security in the short-term.

- Funding was also secured for any new children that had registered to start at a childcare provider in the summer term, prior to lockdown being announced towards the end of March. Most new registrations for the summer term had already signed up by this time ensuring some normality in terms of expected numbers of children being funded at most settings.
- Harrow implemented a flexible approach, relaxing some of the usual conditions such as funding claim deadlines, to enable providers to make new claims for children joining provision once settings were permitted to re-open for all children from 01 June 2020. This allowed some of the children whose parents would have normally approached settings for a place at the start of the summer term, to secure their funding entitlements from 01 June for the remainder of the summer term. The number of new starters and associated funding claims after settings were allowed to re-open was fairly small, as parental anxieties over Covid-19 remained, combined with the timing of re-opening being half-way through the term.
- Overall, it is difficult to assess the true impact on take-up of funding entitlements over the summer term, due to the robust measures taken by Harrow to secure funded provision as close as possible to normal levels.
- Following government funding guidelines for the autumn term 2020, Harrow was able to fund providers at a similar level to the previous autumn term 2019. As demand was unlikely to return to normal levels, providers were secure in the fact that if their take-up was lower than the previous autumn, they would still be funded to pre-Covid levels. Take-up of early education entitlements comparing each term this year with last year, are reported in the demand section of this assessment.

Relaxation in some eligibility criteria

Extended hours (30 hours) funding: Due to various complications caused by the Covid-19 pandemic, the DfE made some temporary changes to 30 hours policy, so that parents were not disadvantaged during the coronavirus outbreak³⁵. These included:

- Parents who lost income and failed to meet the minimum income threshold due to the outbreak were treated as meeting that test.
- Critical workers who exceeded the maximum income threshold due to working additional hours in response to the outbreak also remained eligible.
- Local authorities were asked to use their discretion in accepting the codes of all children who missed the 31 March application or re-confirmation deadline (for the

³⁵ <https://www.gov.uk/government/publications/coronavirus-covid-19-early-years-and-childcare-closures/coronavirus-covid-19-early-years-and-childcare-closures>

summer term), provided they met the eligibility criteria and where there was capacity for providers to take them on. At first, this discretion was applied to children of critical workers only but was subsequently extended to all children once settings were allowed to re-open for all children on 01 June 2020.

In Harrow the impacts of these easements during the summer term were minimal, with only a handful of cases whereby the relaxation in criteria was necessary.

The DfE continued to encourage all eligible parents to apply for and reconfirm their 30 hour codes, even if they had not been accessing their entitlement due to Covid-19 and the closure of settings during lockdown. This was to ensure a smooth transition back into childcare when possible. Parents were able to use and were signposted to guidance online³⁶.

The easements and relaxation in criteria ceased from the autumn term, with the exception of parents facing reduced income due to Coronavirus still being treated as meeting the minimum income threshold for 30 hours, until 31 October 2020.

2 year old funding: In late March 2020, the government temporarily extended the eligibility criteria for the means tested 2 year old funding entitlement, to ensure more of the most disadvantaged two year olds were able to benefit. This was for parents who met the following conditions:

- That they are excluded from claiming public funds as a consequence of their immigration status, or lack of immigration status; and
- They are in receipt of support under section 17 of the Children Act 1989

The children of these families are entitled to a free place if their parents are working and meet similar low-level income requirements to others eligible for the scheme (e.g. a household income of £15,400 a year or less after tax).

These conditions were subsequently made permanent from the 01 September 2020. From early analysis, no additional children benefitted from 2 year old funding under this entitlement in Harrow during the summer term 2020. Looking ahead, discussions are taking place with 'No Recourse to Public Funds' specialists in social care, to ascertain the numbers that could possibly benefit from this new criteria.

Families falling in and out of eligibility

The Covid-19 pandemic has resulted in large-scale economic impacts, including parents/carers falling out of employment, experiencing changes to working hours and wages and a significant increase in benefit claims for those out of work and on low incomes. This directly impacts on eligibility for means tested early education funding entitlements, with some parents/carers falling in and out of eligibility as a result. The government measures introduced around changes to eligibility criteria may help to alleviate some of the negative impacts, however take-up figures of funding entitlements will need to be tracked closely on a

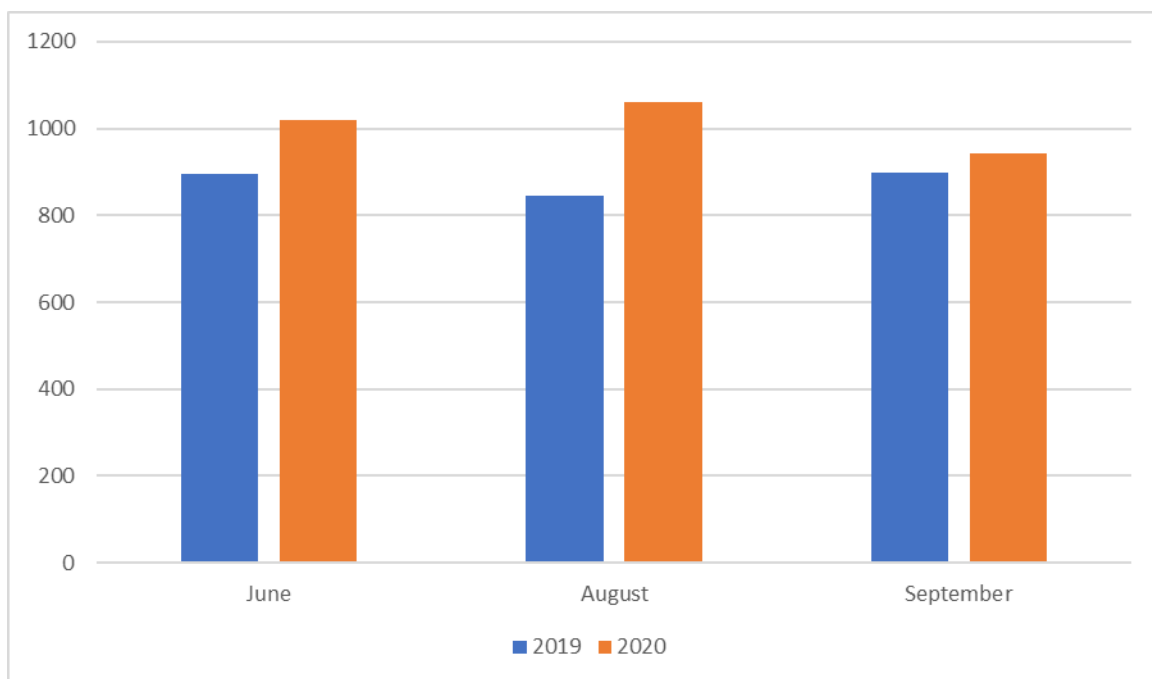
³⁶ <https://www.gov.uk/guidance/check-if-you-can-get-tax-free-childcare-and-30-hours-free-childcare-during-coronavirus-covid-19>

termly basis going forward for a clearer picture on the consequences of such economic upheaval.

Unfortunately, the DfE stopped publishing figures on 30 hour codes issued and validated a year ago. This data would have been very useful in enabling local authorities to track changes in demand for the extended entitlement, especially in the context of the Covid-19 emergency. In the absence of this measure, take-up of extended hours places each term will require close attention and messaging to parents/carers will require consolidation.

Tracking changes to eligibility for 2 year old funding based on economic criteria is possible based on data received via the Department for Work and Pensions (DWP). Lists of families eligible for the entitlement are provided to local authorities 7 times a year. Chart 14 compares numbers of eligible families on the DWP lists with those from the equivalent month in the previous year:

Chart 14: Number of Harrow families eligible for 2 year old funding 2019/2020



** There was no April listing provided this year due to the on-set of lockdown and closure of childcare provision. The months displayed are those during the pandemic to date when lists of eligible parents were received via the DWP*

Chart Summary:

- It is clear that the number of families eligible for 2 year old funding has increased during the Covid-19 pandemic and associated lockdown. This highlights the growth in parents/carers who are out of work or on reduced incomes with associated benefit claims:
 - June 2019 to June 2020 – 12% increase in eligible families (+ 124 families)
 - August 2019 to August 2020 – 20% increase in eligible families (+ 215 families)
 - September 2019 to September 2020 – 5% increase in eligible families (+44 families)

- The September 2020 figures show a possible return to nearer normal patterns of eligibility as the economy slowly re-opened, more people went back to work (or were un-furloughed) and the rate of increase in benefit claims reduced. However fluctuations are expected due to the dynamic and ever-changing nature of the pandemic, government response and economic consequences.

Awareness of entitlements

The government lockdown and closure of childcare settings in response to the pandemic, may have resulted in a gap in awareness of funding entitlements. There may be parents/carers who have had to delay their child's entry into childcare provision and as a result their general awareness of funding entitlements and procedures in order to access them, may have been lost or forgotten. The following steps have been taken to promote public awareness and consolidate messaging around the entitlements:

- Updated information including amendments to eligibility criteria, publicised online via the early years and childcare pages of the Harrow website.
- Information, advice and guidance on the entitlements provided to public enquirers via telephone and email.
- Funding information and resources circulated to colleagues in social care, early support hubs (children's centres), health professionals and libraries.
- Childcare providers encouraged to maintain messaging to parents/carers.
- Messaging via the Development Officer for the 'Together for Two's' project facilitated by PACEY, however outreach projects have been significantly impacted by social distancing restrictions, limiting the amount of face to face promotion.
- Partnership work with Harrow's 'No Recourse to Public Funds' professionals to identify 2 year olds who may qualify for funding under the newly added criteria.

Quality of childcare

Ofsted inspection grades

All childcare providers must register with and be inspected by Ofsted, who give them an overall grade for the quality of their provision. Childminders and private and voluntary providers are on the Early Years Register, and schools and standalone maintained nursery schools are on the Schools register. The grades for both registers are equivalent. Schools with nurseries have an overall inspection grade for the whole school and most also have a separate early years grade. Some settings are registered with the Independent Schools Inspectorate, which inspects under a different framework.

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

Table 16: Childcare provider inspection outcomes (May 2020)

Type of provision	Total number of providers (excluding those not yet inspected and those with 'Met' or 'Not Met' outcomes)		% achieving good or outstanding	
	2019	2020	2019	2020
Childminders	90	87	94%	97%
Nursery classes in schools *	23	23	100%	100%
Maintained nursery schools	1	1	100%	100%
Private and voluntary nurseries	98	98	99%	99%
Total	212	209	97%	98%

* early years grade if available, otherwise overall school grade

Table Summary:

- Overall, 98% (205 out of 209 providers) of inspected early years childcare providers in Harrow are graded 'good' or 'outstanding' by Ofsted. This represents an improvement of 1% year on year.
- Quality remains highest in maintained and school nurseries and PVI settings all of which have at least 99% of providers achieving 'good' or 'outstanding' Ofsted grades. Quality of childminding provision remains slightly lower, but continues to improve.
- Over the past year, all early years provider types have retained their high levels of quality with a further 3% increase in 'good' or 'outstanding' childminders.

Providers with met/not met grade

- When providers do not have any children on site at the time of their inspection, they are given an Ofsted grade of 'met' or 'not met'. This shows whether they are meeting the requirements for Ofsted registration.
- In Harrow 'met' or 'not met' grades have only been issued to childminders. At present, we have 24 childminders with a 'met' grade and 6 childminders with a 'not met' grade. Those with 'not met' grades are issued with actions to put in place in order to meet Ofsted requirements and improve their practice.

National and regional comparisons

Table 17: Regional comparisons of quality

% of providers 'good' or 'outstanding'	Harrow		London		England	
	2019	2020	2019	2020	2019	2020
Childminders	94%	97%	92%	93%	95%	96%
Nursery classes in schools	100%	100%	93%	94%	87%	88%
Maintained nursery schools	100%	100%	97%	97%	98%	98%
Private and voluntary nurseries	99%	99%	95%	98%	97%	97%

It should be noted that regional data on inspection outcomes specifically for nursery classes within schools is not available. Data for primary school outcomes has been used instead, as their grading will most likely be the same as for the nursery classes within them, although not all primary schools have nursery classes attached.

Table Summary:

- The percentage of 'good' or 'outstanding' providers in Harrow is now higher than both the regional figures for London and national figures for England, across all provider types:
 - Nursery classes in schools: 6% higher than London and 12% higher than England. Harrow has maintained the 100% figure achieved in 2019. The gap between Harrow and regional/national figures has closed by 1% since last year.
 - Maintained nursery schools: 3% higher than London and 2% higher than England. There has been no change since last year.
 - PVI nurseries: 1% higher than London and 2% higher than England. The percentage for London has increased, closing the gap on Harrow by 3% year on year. The figure for England remains unchanged
 - Childminders: 4% higher than London and 1% higher than England. The 3% improvement in quality since 2019, means the gap between Harrow and London has increased by a further 2% and for the first time Harrow has exceeded the national figure, by 1%.

Quality Funding Supplement

As part of Harrow's Early Years Single Funded Formula, a 'quality' funding supplement is awarded to early years childcare settings, including school nursery/reception classes and funded PVI providers and childminders. A more in depth summary in regards to how this supplement is defined and applied is covered in the full Childcare Sufficiency Assessment 2018.

In 2018/19, Harrow considered the significant feedback received around workforce development and incorporated an option to reduce the quality supplement, in order to pool a fund. This has enabled the establishment of an Early Years Learning Partnership Group, managed by PVIs, Childminders and maintained schools with nurseries to support system leadership and workforce development. This provided an opportunity to launch a program to

support staff retention and development, review best practice across settings with peer to peer and leadership program partnerships and allow providers to have funding to manage and maintain their own workforce development, including subscriptions, training and peer to peer reviews. The cumulative impact is intended to help maintain the overall quality of early years provision in Harrow. The group has sustained into 2020, however continuity has been halted due the pandemic.

Impacts of Covid-19 on the Ofsted inspection framework

On March 17 2020, all routine inspections of schools, further education, early years and social care providers were suspended. Shortly afterwards lockdown measures were introduced, and childcare settings closed (apart from for vulnerable children and those of key workers). Urgent inspections where specific concerns had been raised still went ahead.

In May 2020 feedback was sought from local authorities and education services over transitional inspection arrangements for education looking ahead to September.

On 09 July 2020, Ofsted released their plans for the autumn term³⁷. Plans for education and early years providers included a phased return to inspection, starting with an interim period of visits during the autumn term. The intention being to resume full inspections in January 2021, whilst keeping the exact timing under review. Plans for the autumn term included:

- Focus on ensuring sufficient capacity within the early years sector, supporting a safe return to education and care and responding to information that causes concern.
- Registration visits to continue in relation to the early years registration process and on-site visits of new providers.
- Emergency regulatory and enforcement work to continue as concerns are raised. This includes regulatory activity in providers that have been judged inadequate or requires improvement and have associated actions to fulfil. Inspectors will look at what action leaders and managers have taken since the last inspection. In these visits, inspectors will confirm whether the safeguarding and welfare requirements of the early years foundation stage (EYFS) are met. The DfE had disapplied the learning and development requirements until 25 September 2020.
- Visits will not result in an inspection grade, but inspectors can use regulatory or enforcement actions if appropriate. An outcome summary will be published after a visit, confirming whether a provider has improved and is meeting the requirements of EYFS.

³⁷ <https://www.gov.uk/government/collections/ofsteds-autumn-2020-plans>

Methodology: sources of data

- Number of children: based on GLA population projections from the London Data Store.
- Children with EHC plans: based on data held by our local authority.
- Supply of childcare: based on data provided to us by Ofsted, who regulate early years provision in schools and childcare provision.
- Vacancy rates: obtained through feedback from providers via email and phone further to regular local authority requests for vacancy information.
- Funded early education: data on take up of funded early education entitlements is based on the Early Years and Schools Censuses, which are taken every January and published by the Department for Education in the statistical collection *Education provision: children under five years of age*. Internal funding headcount data is also used. Data on entitlement to a funded early education place for 2 year olds is provided by the Department for Work and Pensions.
- Quality of childcare: data on childcare quality is provided by Ofsted.

Covid-19: additional sources

- Covid-19 Provider and Parent Surveys: feedback used throughout the report.
- Harrow DfE returns analysis data: to inform actual supply and demand figures during the Covid-19 pandemic.
- Harrow Council Economic Development and Research: benefit claimant count data and regeneration and housing completion trajectories data.
- Harrow Council Collections and Benefits: business support data in supporting childcare providers.