Childcare Sufficiency Assessment Annual Update 2022

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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 2022 annual update further to the full Childcare Sufficiency Assessment (CSA) published in 2021. 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. This update will identify key findings and highlight any changes over the past year using baseline data. We use information about childcare sufficiency to plan our work supporting the local childcare economy. The executive summary will also report on local authority strategies implemented to address key concerns.

The previous CSA annual update in 2020 and the full assessment in 2021, closely tracked the impacts of Covid-19 on the supply and demand for childcare during the course of the pandemic. As Covid restrictions have eased and a full vaccination programme has been rolled-out, life has returned to some semblance of normality as society learns to live with the virus. Therefore, less intensive focus will be required going forward concerning specific impacts of Covid on the childcare market, however a summary of the effects of the pandemic have been included at end of each section of this report for continuity purposes and to conclude previous analysis.

Executive Summary

- There continues to be a sufficient supply of childcare provision to meet current levels of demand. Demand for childcare provision fluctuated during the pandemic but declined overall. Over the past year, attendance in childcare provision has steadily recovered and stabilised. However, demand is not expected to exceed pre-pandemic levels in the near future, due to changes in the economic landscape and parent/carer working patterns, along with the affordability of childcare during a period of cost of living challenges.

- Aside from the impact of the pandemic on the demand for childcare, population projections continue to forecast a declining early years' population over the next several years. A smaller early years' cohort may result in lower demand for early years childcare provision over the next few years.

- Over the two years since the pandemic emerged the impact on the supply of early years childcare is becoming more visible, with a reduction in places available within the Private, Voluntary and Independent (PVI) sector over the past year. Large-scale provider closures had been avoided. However, the long-term decline of pre-school provision and in particular childminding provision accelerated between June 2021 and June 2022, with 4 pre-school closures and a loss of 25 childminders (a few of

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

which have moved borough, rather than closing). Two day nurseries have also closed. These closures cannot solely be attributed to the legacy of the pandemic but also to wider scale changes in demand and existing business pressures. Feedback from providers indicated financial sustainability was a growing concern prior to the pandemic, concerns which have been exacerbated by unreliable levels of demand and rising cost of overheads and expenses in the current economic climate. Recruiting and retaining staff has also become difficult. Provider feedback suggests more certainty in the direction of travel in terms of business sustainability in the future. Overall, confidence in sustaining provision has increased, with a significant reduction in early years' providers who reported being uncertain. However, the proportion of childminders that reported feeling pessimistic has also increased, reflected by the rising number of closures. The supply of childcare provision will continue to be tracked closely.

- Harrow Families Information Service (FIS) shares local data on childcare sufficiency identifying any gaps in provision with prospective providers, to help address any shortfalls and encourage new provision where it is most needed. FIS work with childminder agencies has increased and developed, supporting the growth in agency childminders, to help counter the decline in independently registered childminders. Targeted support around business and operational modelling, financial sustainability and staff retention issues continues to be offered via the Local Authority.

- Over recent years, Harrow has been a high performing borough in relation to regional and national benchmarks for educational and inspection outcomes across the early years' sector. Over the past year the quality of provision has reduced slightly to the lowest performance level since 2018, due to falls in quality reported within PVI nurseries and childminding provision. This places Harrow slightly below both regional and national comparators. This drop in quality may be attributed to the lag effects of the pandemic, which caused disruption to the continuity of practice, taking focus elsewhere for some time. It is possible, therefore, that the drop in standards is temporary and with Local Authority support and interventions, quality will improve going forward. Targeted support is provided to settings judged less than 'good' by Ofsted, whilst resources, training and provider forums continue to support all provision. The Early Years Learning Partnership (EYLP) also offer peer to peer support and are focusing resources on addressing the quality of provision. The challenges faced by providers in relation to inspection at this time is felt regionally and nationally also.

- There continues to be a sufficient supply of childcare provision to meet demand for funded childcare places. The number of providers offering all early education funding entitlements has fallen slightly over the past year, reflecting the overall reduction in the number of early years' childcare providers. However, in most cases, the proportion of each provider base offering the entitlements has either increased or been maintained. Provider participation and assistance around implementation of funding entitlements is facilitated via funding workshops, training and one-to-one support.

- Some 2 year-old children whose families receive certain benefits (including in-work benefits with income thresholds), or who have a disability or are looked after by the local authority, are entitled to 15 hours funded early education per week (from age 2 and a term). Take-up of funded early education for 2 year-olds in Harrow has increased significantly. Take-up has traditionally been low in Harrow, but further to an initial drop early in the pandemic, it has since recovered over the past year to some of the highest levels recorded in the borough and now sits slightly above regional comparators. It remains below the national average, but the gap has narrowed. Record levels of take-up have been recorded in each respective school term of the 2021/22 academic year. Parents/carers may have identified with the benefits of accessing their entitlement more so than previously, having experienced closures of childcare and education settings earlier in the pandemic. Efforts continue to promote and stress the benefits of the entitlement. Depending on local authority data protection agreements with the Department for Work and Pensions, more contact information may be made available to identify and reach those families not accessing their entitlement.

- All children aged 3 and 4 are entitled to 15 hours universal funded early education per week until they start reception class in school (from age 3 and a term). The take-up of universal funded early education for 3 and 4 year-olds has increased over the past year, further to a decline recorded the previous year mirrored both regionally and nationally. Take-up remains on par with or above regional comparators. Some 3 and 4 year-olds where both parents work, or from lone parent families where that parent is working, are entitled to 30 hours funding per week (extended hours), until they start reception class in school. Numbers of children accessing the extended hours entitlement has also increased over the past year, to the highest levels recorded since roll-out.

- There has been a slight reduction in the number of childcare providers for school aged children and places over the past year. Conversely, holiday club provision continues to increase. The school age population is projected to remain relatively stable over the next several years, so additional pressures on school age childcare provision are unlikely, assuming current levels of supply and demand also remain stable.

- Queensbury, Wealdstone and Canons continue to be identified as priority wards, containing some of the lowest numbers of PVI childcare places, whilst having considerable cohorts of early years' children. Harrow Weald, Roxeth and Kenton West also have relatively low numbers of childcare places, however they have comparatively smaller early years' populations. Although there is less sufficiency of childcare in the above mentioned wards compared to the rest of the borough, supply is still meeting current levels of demand. Parental choice is particularly restricted in Queensbury and Kenton West, with only 3 childcare providers operating in Queensbury and 4 in Kenton West. These findings continue to be highlighted to enquirers interested in setting up new provision and existing providers looking to expand in Harrow, in order to encourage new provision in these priority wards.

- Greenhill and Marlborough remain as the wards with the largest early years' cohorts and continue to have some of the largest supplies of childcare places. Marlborough remains the only ward with significant projected growth in the early years' population. As long as current levels of provision are maintained, it remains well placed to meet future demand. Wealdstone is the focus of a large-scale regeneration project in the heart of Harrow, although there has been some delay to the re-development. New childcare provision must be considered a priority here to cope with potential increased demand, whilst high levels of provision in the adjoining wards of Greenhill and Marlborough must be maintained to cope with any overspill from Wealdstone.

- Queensbury, Headstone South, Marlborough and Edgware continue to contain no pre-school provision and Kenton West remains the only ward with no childminders operating. This limits parental choice in these wards, however neighbouring wards 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 has increased across provisions over the past year, with the most significant increase within PVI settings, followed by school nurseries. The increase in school reception was smaller, however this follows two years when numbers of SEND pupils had been falling in school nurseries and reception classes. This increase was not unexpected following the disruption to referrals and assessments caused by temporary school/provider closures and lower attendance in provision earlier in the pandemic, creating a back-log which is now being addressed. The primary need for the majority of children requiring SEND support remains speech and language and communication and interaction. Support strategies continue to assist early years' childcare providers in meeting the needs of children with SEND, via the Harrow Early Years SEND Team. These include an inclusion fund which supports and enables SEND children to access learning and make progress across all early learning goals, SEND surgeries to support providers in identifying need and termly collation of SEND registers to ensure children are tracked and supported accordingly. The Early Years Area SENCO continues to track the progress of all children supported through the inclusion fund.

Demand for childcare

Population of early years children

In total, there are approximately 17,200 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) 2020 based trend projections, published in September 2021.

Table 1: Early years population by age[2]

Age	2018	2020	2022	2023	2025	2027
Age 0	3800	3600	3400	3300	3300	3300
Age 1	3500	3500	3400	3300	3200	3200
Age 2	3400	3500	3500	3400	3200	3200
Age 3	3300	3400	3400	3400	3200	3200
Age 4*	3400	3400	3500	3400	3300	3200
Total:	**17400**	**17400**	**17200**	**16800**	**16200**	**16100**

* *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 minor fluctuations, however it is expected to decline quite markedly over the next five years.

It should be noted that the age group population data presented in Tables 1 and 2, are averages taken from 4 principal variants produced using different assumptions that comprise the GLA 2020 trend-based projections.

There have been some recent changes to Harrow ward names and boundaries, which will be used in future reports. However, the data used in this assessment uses the previous ward names (as the GLA ward-based population data for Harrow still uses the old ward definitions). The distribution of the early years' population by ward[3], remains largely unchanged since last year's sufficiency assessment. In summary, 3 out of 5 wards with the highest cohort of early years aged children are located in central Harrow whilst the wards with the lowest cohort of early years aged children are generally 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
    - Roxbourne
    - Edgware
    - Wealdstone
- Wards with the lowest early years' population
    - Hatch End
    - Pinner South
    - Pinner

[2] *GLA trend-based population projections (Sept 2021): The population projections have been rounded to the nearest 100*
[3] *GLA housing-led ward population projections (Sept 2021)*

    - Rayners Lane
    - Headstone North
- Wards with projected growth of the early years' population (up to 2027):
    - Marlborough

The data projections of the early years' population on a ward level out to 2027[4], have changed slightly over the past year. Last year, 7 out of 21 wards in Harrow were expected to experience growth by 2027, even if only by a small number. The most recent projections indicate that Marlborough is now the only ward with projected growth by 2027. All other wards are now expected to experience reductions of varying degrees.

Therefore, overall expected demand for childcare by the early years age group in Harrow could potentially decrease over the next few years on a borough and ward level. The most significant potential impacts on demand are likely in and around the growth ward of Marlborough. This assumption is based on population projections only.

Population of school age children

In total there are 23,000 children aged 5-11, and 9,900 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 age[5]

Age 5	3400	3200	3300	3400	3400	3200
Age 6	3400	3300	3300	3300	3400	3300
Age 7	3500	3400	3200	3300	3400	3300
Age 8	3400	3300	3300	3200	3300	3300
Age 9	3300	3400	3300	3300	3300	3300
Age 10	3300	3300	3300	3300	3100	3200
Age 11	3100	3300	3300	3300	3200	3200
Total 5-11:	**23,400**	**23,200**	**23,000**	**23,100**	**23,100**	**22,800**
Age 12	3100	3300	3300	3300	3300	3100
Age 13	3000	3200	3300	3300	3300	3200
Age 14	3100	3200	3300	3400	3500	3400
Total 12-14:	**9,200**	**9,700**	**9,900**	**10,000**	**10,100**	**9,700**
Total 5-14:	**32,600**	**32,900**	**32,900**	**33,100**	**33,200**	**32,500**

Table Summary:

- The population projections remain similar to those reported in last year's assessment.
- The school age population is projected to remain relatively stable over the next few years, before declining slightly by 2027.

[4] *GLA housing-led ward population projections (Sept 2021)*

[5] *GLA trend-based population projections (Sept 2021): 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 0-18 with an EHC plan in Harrow[6]

Age	Number of children 2021	Number of children 2022
Birth to school age	27	38
Primary school (reception to year six)	769	784
Secondary school (year seven to thirteen)	845	872
Total:	**1641**	**1694**

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 11 more children in the early years age group (birth to school age) with an EHC plan in 2022 compared to 2021, representing a 41% increase year on year. This increase may be due to a lag effect of previously delayed or missed referrals and identification of SEND due to the Covid-19 pandemic, now being enabled as processes return to normal and children return to childcare and education.
- School aged children with EHC plans also increased in 2022 compared to 2021:
    - Primary school: +15 children (2% increase year on year)
    - Secondary school: +27 children (3% 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 up to 20 weeks from referral when possible 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 require SEN support.

SEND within Early Years

An inclusion fund is provided for 3 and 4 year old funded children within PVI settings (including childminders) and school nurseries in receipt of 15 or 30 hours funding, who are on the early years SEND register and require SEND support. The purpose is to support children with emerging SEND/additional needs, so they can be meaningfully included in the learning experiences, social and cultural life of their setting/school. It is a targeted resource to provide targeted services and support outside of the school/settings expected remit, for children with additional needs/emerging SEND. 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 2021 and 2022*

- **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 43 successful bids were funded over the three school terms during the 2021/22 academic year*).

- **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. A three-tier evidence-based system has been introduced, (Tier 1 – universal offer / Tier 2 – targeted offer / Tier 3 – enhanced offer) with each successive tier requiring additional levels of evidence to ascertain need. Once applications are received, a panel discusses and agrees the funding tier to be awarded. Claims for tiers 1 and 2 can be made on a termly basis, whereas tier 3 is a one-off payment whereby the setting is applying for an EHC plan. (*1921 claims during the 2021/22 academic year across all provider types – 533 more claims or a 38% increase compared to the previous academic year*).

SEND within PVI Settings

Table 4: Number and percentage of 3 and 4 year-olds in PVI settings by SEN provision[7]

Harrow SEN PVI Settings				
	2021		2022	
SEN Provision	**Number of Pupils**	**% of Pupils**	**Number of Pupils**	**% of Pupils**
SEN Support (*Inclusion claims*)	431	13.7%	547	16.8%
EHCP	17	0.5%	29	0.9%
No SEN	2696	85.8%	2688	82.3%
Total funded 3&4 year-olds	**3144**	**100%**	**3264**	**100%**

Table Summary:
- In Summer 2022, 3264 pupils aged 3 and 4 were funded in PVI settings
- 16.8% of funded pupils were on SEND support (3.1% increase year on year).
- 0.9% of funded pupils were SEND with an EHC plan (0.4% increase year on year).
- 82.3% of funded pupils have no SEND (3.5% decrease year on year).

[7] *PVI funding headcount data and Early Years inclusion funding claims Summer 2021 and 2022 (via Early Years SEN Inclusion Funding Team)*

Chart 1: Number and percentage of pupils receiving inclusion funding by SEN Primary Need

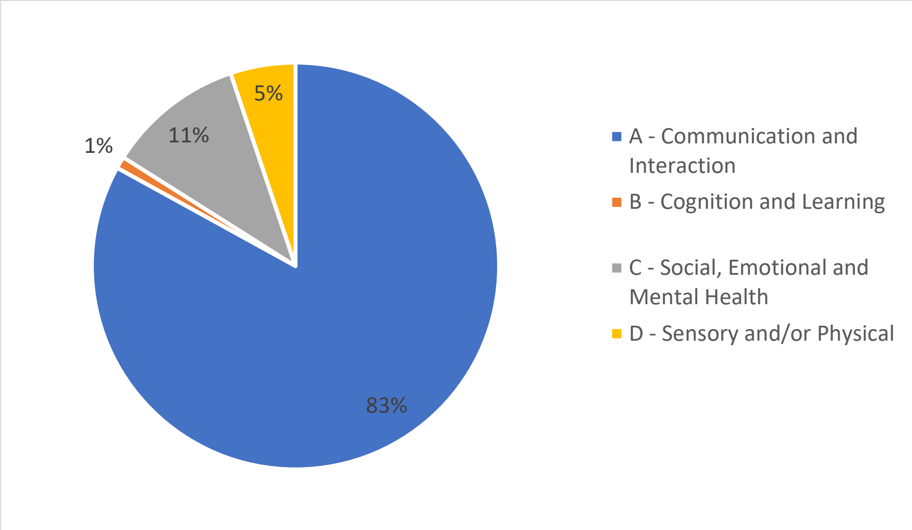


Chart Summary:

- The most common primary need of all funded SEND pupils is Communication and Interaction at 83%. This represents a 1% increase year on year.
- This is followed by:
  - Social, Emotional and Mental Health at 11% (no change year on year).
  - Sensory and/or Physical at 5% (1% decrease year on year).
  - Cognition and Learning at 1% (no change 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 24 successful DAF claims made in the 2021/22 academic year.

SEND within School Nursery and Reception

Table 5: Number and percentage of pupils in School Nursery by SEN provision[8]

Harrow SEN				
NCY Nursery				
	2021		2022	
SEN Provision	**Number of Pupils**	**% of Pupils**	**Number of Pupils**	**% of Pupils**
SEN Support	39	3.4%	72	6%
EHCP	10	0.9%	9	0.8%
No SEN	1091	95.7%	1110	93.2%
Total	**1140**	**100.0%**	**1191**	**100%**

Table Summary:

- In January 2022, 1,191 pupils were in School Nurseries.
- 6% of pupils were on SEND Support (72 pupils). This represents a 2.6% increase year on year.

[8] *Harrow School Census 2021 and 2022*

- 0.8% of pupils were SEND with an EHC plan (9 pupils). This represents a 0.1% reduction year on year.
- 93.2% of pupils have no SEND (1110 pupils). This represents a 2.5% reduction year on year.
- Overall, there are 81 SEND pupils in School Nurseries. This represents a 2.5% increase year on year.

Table 6: Number and percentage of pupils in Reception by SEN provision[9]

Harrow SEN				
NCY – Reception				
	2021		2022	
SEN Provision	**Number of Pupils**	**% of Pupils**	**Number of Pupils**	**% of Pupils**
SEN Support	214	6.9%	226	7.4%
Statement/ EHCP	63	2%	63	2.1%
No SEN	2827	91.1%	2769	90.5%
Total	**3104**	**100%**	**3058**	**100%**

Table Summary:

- In January 2022, 3058 pupils were in Reception classes.
- 7.4% of pupils were on SEND Support (226 pupils). This represents a 0.5% increase year on year.
- 2.1% of pupils were SEND with an EHC plan (63 pupils). This represents a 0.1% increase year on year.
- 90.5% of pupils have no SEND (2769 pupils). This represents a 0.6% reduction year on year.
- Overall, there are 289 SEND pupils in Reception classes. This represents a 0.6% 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 an 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.

Effects of the Covid-19 pandemic on demand for childcare

Demand for childcare has fluctuated since early years' providers were permitted to re-open to all children in June 2020, following the first government lockdown. Peaks and troughs in demand (as assessed by attendance figures), seemed to correlate on-the-whole with peaks and troughs in virus rates. However, as full vaccine programmes have been implemented

[9] *Harrow School Census 2021 and 2022*

and time has passed, demand seems to have recovered and stabilised. Changes in work patterns, a lower birth rate and corresponding fall in the early years' population, suggest that it is unlikely to exceed pre-pandemic levels over the next few years. Much of the early years data that tracked changes in demand and attendance within provision during the pandemic, is no longer collated. National estimates of usual daily attendance levels ceased at the end of 2021, as did the DfE returns on a local level assessing attendance figures in Harrow. However, key findings from the latest data in the autumn term 2021, along with analysis of feedback from provider surveys collated during the spring term 2022 are presented below:

- A peak of 5067 children in early years provision in the autumn term 2021 (recorded on 11th November)[10], represented 29% of the total early years' cohort in Harrow. This compares to a peak of 4422 children or 25.3% of the early years' cohort recorded in the autumn term 2020. *However, it must be noted that the early years' population includes all 4 year-olds, many of whom would be in school reception class rather than early years provision.*

- This represents a 15% increase in children attending early years provision between the autumn term 2020 and 2021 (+645 children), or a 3.7% increase of the early years' cohort attending provision.

- National data via the DfE which ceased in December 2021, provided estimates on attendance in early years provision during the pandemic compared to normal expected levels[11]. Peak estimated attendance in each school term since the start of the pandemic up until the end of 2021, provide an insight into changing levels of demand on a national level:

    - As of 16 July 2020 – 25% of the usual daily attendance level (417,000). *Data collected at this stage of the pandemic did not consider part-time patterns of attendance in childcare provision, meaning not all children would be in attendance on the day of the data collection. This suggests the usual daily attendance level was more likely to be somewhere closer to 35-40% in reality.*

    - As of 19 November 2020 – 91% of the usual daily attendance level (806,000).

    - As of 25 March 2021 – 80% of the usual daily attendance level (843,000).

    - As of 24 June 2021 – 81% of the usual daily attendance level (937,000).

    - As of 11 November 2021 – 86% of the usual daily attendance level (783,000).

    - Data stopped being collated by 2022, however the DfE estimated that as of 09 February 2022, 88% of children booked into a place, attended a setting.

- Nationally, attendance in early years provision increased significantly between the summer and autumn terms 2020. Many children had been kept at home for long periods of time and early years settings were permitted to remain open for all children during the second national lockdown in November 2020. By late 2021 and into 2022, the usual daily attendance levels settled at between 12-14% lower than prior to the

[10] *Harrow DfE returns analysis*

[11] *https://explore-education-statistics.service.gov.uk/find-statistics/attendance-in-education-and-early-years-settings-during-the-coronavirus-covid-19-outbreak*

pandemic, suggesting levels of demand for childcare have dropped and are stabilising at a lower rate nationally.

Provider Survey Findings

PVI nursery providers and childminders in Harrow were surveyed about levels of demand for childcare during the spring term 2021 and spring term 2022, compared to the corresponding school terms in the previous year. It should be noted that in the spring term 2021, comparisons were being made with the spring term 2020 which was largely unaffected by the pandemic until the very end of term.

Chart 2: Demand for childcare places as reported by Harrow childcare providers

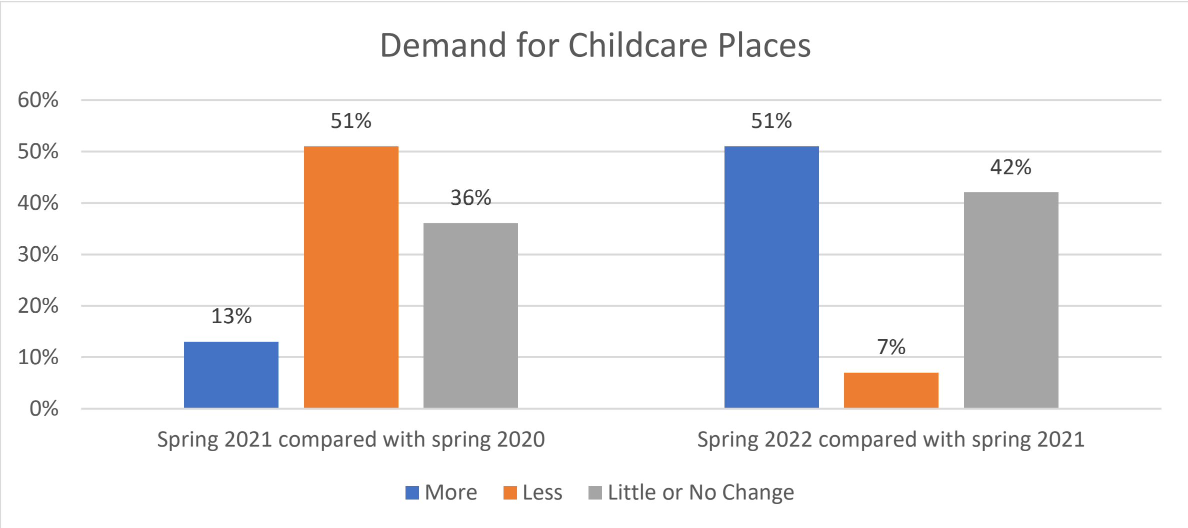


Chart Summary:
In the spring term 2021:

- 51% of providers reported less demand for childcare places than in the previous spring, highlighting the impacts the pandemic was having on parents using childcare. The start of the spring term 2021 coincided with the peak in virus infections, and the vaccine roll-out was still in its infancy.
    - Feedback suggested childminders were affected by falling demand a little more than PVI settings with 64% of childminders reporting lower demand compared to 48% of PVI nurseries.

In the spring term 2022:

- 51% of all providers that responded, reported higher demand for places compared to the spring term 2021.
- 42% reported little or no change.
- 7% reported lower demand.
    - *PVI nurseries*: 59% reported higher demand, 38% little or no change and 3% lower demand
    - *Childminders:* 27% reported higher demand, 55% little or no change and 18% lower demand
- Of those providers that supplied comparative figures for children on-roll in the spring term 2022 compared to the spring term 2021:
    - 71.1% had more children on roll, 10.5% had the same numbers and 18.4% had fewer children on-roll.
    - This is in stark contrast to figures supplied in spring 2021, when 69.4% of providers had less children on-roll than the previous spring.

Provider feedback suggests that overall demand for childcare places had fallen during the peak of the Covid-19 pandemic in early 2021 but has since increased quite significantly by the spring term 2022.

Providers were also asked whether they noticed any changes in parental confidence regarding using childcare:

- Spring term 2022, compared to the spring term 2021:
    - 51% reported parents/carers were more confident, 2% less confident and 47% reported no change.

This suggests improved parental confidence in using childcare compared to feedback earlier in the pandemic when confidence levels were less robust (18% of responses reported parents were less confident in using childcare in autumn 2020 and 26% in spring 2021, compared to the previous terms). This indicates that parental concerns around Covid-19 are now much less of a factor when considering using childcare.

Lastly, providers were asked about whether they had noticed any changes to the number of hours of childcare that parents pay for in 2022 compared with prior to the pandemic:

- 25% responded they have increased, 35% that they have decreased, 35% reported no change and 5% did not know.

The feedback was somewhat conflicting, although a slightly larger number of providers noticed a decrease in paid for hours or no change, compared with those noting an increase. This could reflect local scale changes in working patterns and economic landscapes, leading to varying impacts on demand for paid for childcare.

Comparisons of the take-up of funded early education entitlements before and through the pandemic, can provide a measurable indication of how demand for funded places has been impacted (as outlined on page 29).

Supply of childcare

Number of early years providers and places

In total, there are 262 childcare providers in Harrow, offering a maximum of 7,476 early years' childcare places.

Table 7: Number of early years' providers and places

Type of provision	***Number of providers***	***Number of registered places***
Childminders*	122	742
Nursery classes in schools	28	1430
Maintained nursery schools	1	102
Private, voluntary and independent nurseries	111	5202
Total:	**262**	**7476**

*The data in this table was correct on: 01 May 2022. *Some childminder places may also be available for older children.*

For private, voluntary and independent nurseries (PVI) 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, 0.9% up on last year; 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). This is 0.9% down on last year. 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 25 early years' providers and 86 registered places, all of which were from the PVI sector (mainly childminders), as displayed in table 8.

Harrow had a total of 5,944 early year's childcare places for children within the PVI sector as of May 2022. These places are available through:

- 76 day nurseries making available 4,026 places for children aged 0-4 years (67.7% of all PVI places) and 28 playgroups/ pre-schools making available 862 places for children aged 0-4 years (14.5% of all PVI places).
- 122 childminders making available 742 places for children aged 0-4 years (12.5% 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

	2021		***2022***	
Provision type	***Number***	***Places***	***Number***	***Places***
Day Nursery	77	4010	76	4026
Pre-school / Playgroup	31	920	28	862
Childminders	144	838	122	742
Independent School Nursery	7	314	7	314
Total:	**259**	**6082**	**233**	**5944**

As recorded on 01 May each year. 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.

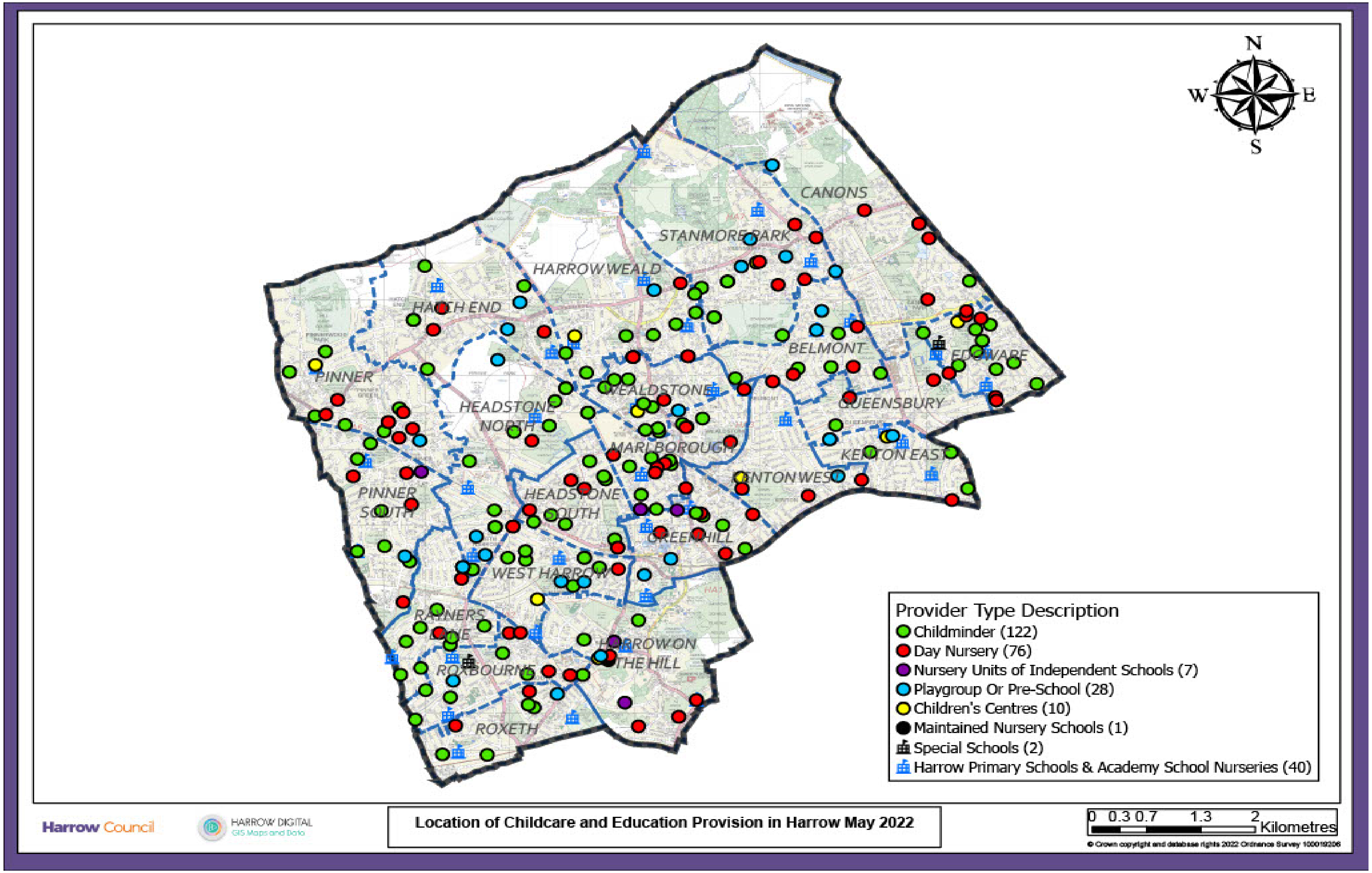
Table 8 Summary:

- The total number of PVI providers in Harrow has reduced by 26 in the past year. This continues the trend of declining numbers over the past several years, with the exception of 2021 when numbers increased.
    - There has been a reduction of 3 pre-school/playgroups in the past year, continuing the trend of declining numbers of this provider type.
    - There has been a reduction of 1 day nursery in the past year. This comes after several years of growth in the numbers of this provider type.
    - The has been a reduction of 22 childminders in the past year. This continues the declining trend in numbers over the past several years, with the exception of 2021 when there was a small increase.
    - There has been no change to the numbers of independent school nurseries.

- The overall number of places available within PVI settings has decreased year on year for the first time since these figures have been reported and compared via sufficiency assessments in 2018. There has been a reduction of 138 places between 2021 and 2022, or a fall of 2.3%:
    - 0.4% increase in the number of places available within day nurseries.
    - 6.3% decrease in the number of places available within preschool/playgroups.
    - 11.5% decrease in the number of places available within childminding settings.
    - No change to the number of places available within independent school nurseries.

- Despite the overall reduction in the number of childcare places available in the PVI sector over the past year, the total number of places remains higher than in any other year, apart from 2021. The market share of day nursery places available continues to increase (with a very slight increase in the number of places over the past year). 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 2021, 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 previous assessment is provided below:

- The wards with the largest supply of PVI childcare places remain largely unchanged:
  - Stanmore Park, Pinner, Marlborough, Greenhill, Headstone South, Edgware and Hatch End. However, growth in Headstone South has seen it replace Pinner South as one of the 7 wards with the most places.
  - Stanmore Park replaced Marlborough as the ward with the most places last year and remains so this year.
  - 5 out of 7 of the above wards are located in central and north-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 remain unchanged:
  - Queensbury, Harrow Weald, Wealdstone, Canons, Roxeth, Kenton West and Belmont. These wards remain unchanged since last year, albeit with a few changes in order.
  - Queensbury remains the ward with the lowest number of places.
  - The wards with the lowest number of childcare places are scattered throughout the borough but include a cluster of wards in the east.
- Of the 21 wards in Harrow, 7 experienced growth in the supply of PVI childcare places and 12 experienced losses, with the remaining 2 wards 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. The greatest changes (more than 10%) were experienced in the following wards:
  - Wards with the largest annual percentage growth:
    - Kenton East: 30 places (13.9% growth)
    - Headstone South: 43 places (12% growth)
  - Wards with the largest annual percentage reduction:
    - Harrow Weald: 30 places (19% reduction)
    - Edgware: 59 places (13.4% reduction)
    - Harrow on the Hill: 43 places (12% reduction)
- The wards with the lowest number of PVI childcare providers remain unchanged; Queensbury with 3 providers and Kenton West with 4 providers.
- Most wards contain a choice of provider types for parents/carers. However, Kenton West has no childminders operating and Edgware, Headstone South, Marlborough and Queensbury have no pre-schools operating.

Early years vacancies

Table 9: Early years vacancies

Type of provision	*Number of providers*	*Number of providers with vacancies*
Childminders	122	24
Nursery classes in schools	28	21*
Maintained nursery schools	1	1
Private, voluntary and independent nurseries	111	36

*Data in this table was correct on 01 May 2022. *As reported in the School Census January 2022*

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. Typically, vacancy rates are higher in the autumn, when many children move to school.

Table Summary:

- 20% of childminders reported having vacancies available.
- 75% of nursery classes in schools had vacancies available in January 2022. 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.
- 32% of private, voluntary and independent nurseries reported having vacancies available.
- 31% of all early years' providers reported having vacancies, 8% lower than recorded in the 2021 assessment. There was a 13% reduction in childminders and 6% reduction in private, voluntary and independent nurseries reporting vacancies.

Number of school age providers and places

In total, there are 42 providers of childcare for school age children during term time, and 18 providers of childcare for school age children during the holidays. There are also 122 childminders who may provide care for school age children.

Table 10: Number of school age providers and places

Type of provision	*Number of providers*	*Number of registered places*
Breakfast club – primary school	12	402
After-school club – primary school	22	799
Breakfast club – secondary school	3	140
After-school club – secondary school	1	40
Breakfast club – other	1	40
After-school club – other	3	108
Childminders	122	742
Holiday club	18	1033

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. As not all such clubs are widely advertised, it is possible that we have under-counted the provision of breakfast and after school clubs and holiday clubs.

Table 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. Changes to school age childcare provision over the past year:
    - The number of childcare providers for school age children has reduced by 5 over the past year. The number of registered places across these providers has reduced by 4.4% over the past year:
        - 7.8% reduction of places in breakfast clubs operating in primary schools.
        - 1.5% reduction of places in after school clubs operating in primary schools.
        - No changes to the number of places in breakfast clubs at secondary schools or other sites, but a small reduction in after school club places in 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 18 Ofsted registered holiday clubs in Harrow offering childcare places for school aged children. This represents a net gain of 2 providers over the past year with a significant 55.8% 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.

Effects of the Covid-19 pandemic on the supply of childcare

Regular data returns tracking the local supply of early years' childcare provision have been collated and submitted to the DfE since early in the pandemic and reported on in the past two assessments. These local data returns ceased at the end of 2021 and the DfE national estimates of open early years' providers stopped in February 2022. Key findings from the most recent data, local information on new and closed providers over the past year and analysis of feedback from provider surveys collated in the spring term 2022, are presented below:

- A peak of 224 providers or 85% of the total early years market in Harrow was open during the autumn term 2021 (recorded on 11th November)[12] This is comparable to peak figures reported in the previous school term (summer 2021) and the previous autumn term 2020 and remained above national estimates:
    - 100% of PVI providers and school based early years' providers were open, whereas just above 70% of childminders were open, meaning all closed providers were childminders. Some childminders did not respond to data requests meaning their status was unknown – these could not be included as 'open' providers, therefore more childminders were probably open than reported. In addition, there would have been a number of childminders with 'Active' Ofsted registrations but who may not have been minding at the time of data collection, hence might appear as closed.
    - It should be noted that a significant number of PVI nurseries and childminders did have to close temporarily at times during the autumn term 2021, due to cases of Covid in staff which resulted in staff to child ratios not being met.

[12] *Harrow DfE returns analysis*

- Nationally, a peak of 81% of early years' providers were estimated to be open during the autumn term 2021 (recorded on 11th November)[13]. As with local data reported above, this is comparable to peak national estimates reported in the previous school term (summer 2021) and the previous autumn term 2020.
    - The national estimates always tended to be a few percent behind the figures for Harrow throughout the pandemic.
    - As local data returns ceased in December 2021, national estimates continued for another couple of months into 2022. The estimated number of open early years settings increased to the highest values recorded through the pandemic, suggesting a return to something closer to operational normality in the marketplace:
        - By the week of 17 January 2022 an estimated 93% of early years settings were fully open, with a further 5% partially open.
        - By the week commencing 14 February 2022 an estimated 96% of early years settings were fully open, with a further 3% partially open.
        - Staff absences due to Covid related reasons remained a significant issue through the spring term 2022.

- ***New provider registrations and permanent closures***: There have been widespread concerns about the sustainability of childcare provision during the pandemic. Concerns regarding potential closures were not born out when reported on in last year's assessment, with an increase in early years' provision. However, over two years on from the start of the pandemic, the lagged effects on the supply of childcare provision may now be showing its hand. Some providers that have closed had already reported being financially unsustainable and some childminders had been thinking about closing prior to the pandemic. Unpredictable and changing levels of demand for childcare and other health related concerns during the pandemic, have cemented some of the decisions to close. Between June 2021 and June 2022:
    - *PVI nurseries*: 1 new day nursery has opened and 1 pre-school with an 'Active' registration, but no children on-roll has been included in this year's figures (it was omitted from supply figures in the previous assessment). 6 PVI nurseries have closed including 4 pre-schools and 2 day nurseries. Overall, there has been a net loss of 4 PVI nurseries; a reduction of 3 pre-schools and 1 day nursery.
    - *Childminders*: 3 new childminders have opened and 25 have closed, resulting in a net loss of 22 childminders. Of those that have closed, 5 have moved borough and the remaining 20 have resigned.
    - *School aged childcare*: 6 out of school clubs and 6 holiday playschemes have opened, whilst 11 out of school clubs and 4 holiday playschemes have closed, resulting in a net loss of 5 out of school clubs and net gain of 2 holiday playschemes. Of the providers that closed, all bar 1 out of school club were operating from school premises.
- There had already been declining numbers of pre-schools and childminders over recent years, however the pandemic may have exacerbated this decline (except for the anomalous growth in childminders during 2021). There has also been a slow but steady reduction in out of school club provision since the pandemic. Conversely holiday club provision has increased. Day nursery provision had also been increasing however, growth has stopped over the past year with the net loss of one provider.

[13] *https://explore-education-statistics.service.gov.uk/find-statistics/attendance-in-education-and-early-years-settings-during-the-coronavirus-covid-19-outbreak*

Provider survey findings: Regular provider surveys have been carried out since early in the pandemic to gauge the concerns and challenges experienced by the childcare market, and how this might impact on the sustainability and supply of childcare. Analysis of feedback has been reported on in the previous two assessments. Another survey was carried out in spring 2022. PVI nurseries and childminders were asked how optimistic they feel about the sustainability of their businesses in the future, which can be compared to feedback provided a year ago in spring 2021:

Chart 3: Provider confidence in business sustainability

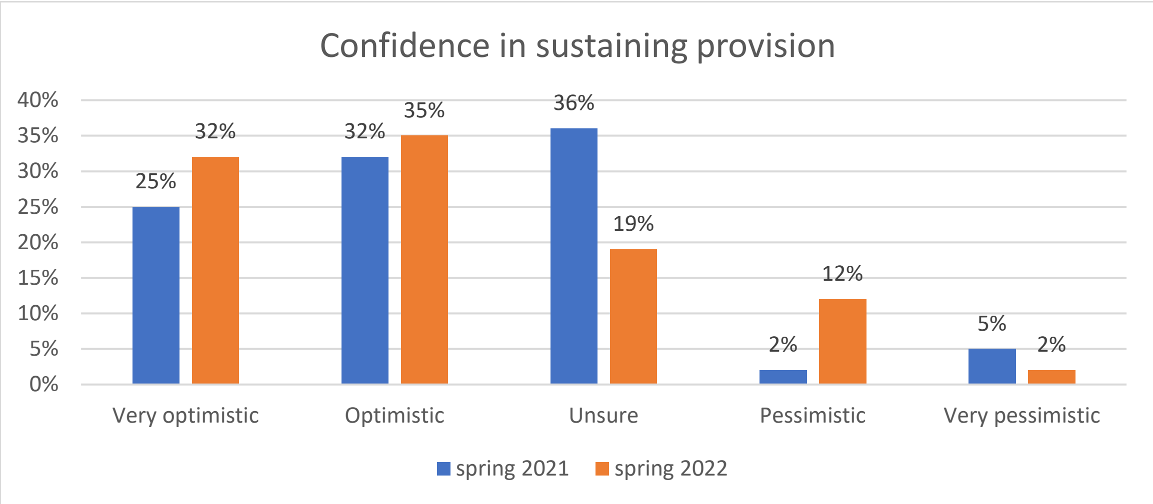


Chart Summary:

- Over two thirds of respondents were either optimistic or very optimistic about sustaining their provision in the future, an increase of 10% over the past year:
  - 69% of PVI nurseries and 64% of childminders were either optimistic or very optimistic, up 12% for PVI nurseries and 10% for childminders since spring 2021.
- Almost a fifth of respondents remain unsure about sustainability, down 17% from last year. This uncertainty was reported entirely within PVI nurseries:
  - 25% of PVI nurseries and 0% of childminders were unsure, down 8% for PVI nurseries and 46% for childminders since spring 2021.
- 14% of respondents were pessimistic or very pessimistic about sustaining their provision in the future. Most who responded as such were childminders, reflecting the significant number of childminder closures over the past year:
  - 6% of PVI nurseries and 36% of childminders were either pessimistic or very pessimistic, down 3% for PVI nurseries but up 36% for childminders since spring 2021 (it should be noted, that only about 10% of all childminders responded to the survey).
- Providers were also asked if they are facing severe financial difficulties:
  - 16% of respondents answered yes (including 12% of PVI respondents and 27% of childminders), and 84% answered no.
- Although most providers have been open into 2022 and Covid restrictions have been lifted, temporary or part-closures have continued to occur because of staff to child ratios being impacted by Covid related staff absences. This creates disruption to children's early education and in some cases to income streams for providers. Providers were asked if they have had to close their setting or part of their setting for any period of time:

  - In total, 42% of respondents answered yes and 58% no. In PVI nurseries 34% answered yes and in childminding settings 64% answered yes.
- The recruitment of staff in early years settings has also become a growing issue with many vacancies remaining unfilled. This is possibly due to delays in prospective childcare workers completing and achieving their childcare qualifications during the pandemic and possibly a smaller cohort of students accessing childcare courses. Some settings have also noted less migrant workforce available from parts of Europe since Brexit. Providers were asked how difficult it is to recruit staff:
  - 76% of respondents answered very difficult or somewhat difficult, 6% answered neither difficult or easy, 6% answered somewhat easy and 12% did not know.
- Providers were also asked if they had taken any steps to help business sustainability. Some of the most common steps taken were as follows:
  - 40% of respondents increased charges made to parents.
  - 23% increased their opening hours.
  - 23% increased the number of staff.
  - 21% increased the number of free early education entitlement places they provide.

Funded early education

Proportion of 2 year old children entitled to funded early education

In Harrow, 26% of 2 year-olds are entitled to funded early education, 1% lower than the previous year. This equates to around 921 children per year in 2021.

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 11.

Table 11: Proportion of eligible children taking up their funded place in Harrow[14]

Age	% of eligible children	
	2021	2022
Age 2	49%	63%
Age 3 and 4	82%	86%
3 year-olds	76%	83%
4 year-olds	88%	89%

The DfE 2021 figures have been revised down by 1% for 3 & 4 year-olds since the figures presented in the 2021 assessment

Table Summary:

- 63% of eligible 2 year-olds are taking up their funded place, leaving 37% who are not accessing their entitlement (*The 63% take-up figure is taken from Harrow funding headcount data as it is more current and accurate than the 59% take-up rate listed by the DfE*). There has been a 14% increase in take-up since 2021.
- 86% of eligible 3 and 4 year-olds are taking up their funded place, 4% up on 2021. 14% of 3 and 4 year-olds are not accessing their entitlement

[14] *Department for Education: Provision for children under 5 years of age January 2022 & Harrow early education funding headcount data spring term 2022*

- 17% of 3 year-olds are not taking up their funded place
- 11% 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. It should also be noted that nursery attendance is not compulsory.

Table 12: Regional and national take up comparisons[15]

Age	Take-up: % of eligible children							
	Harrow		Outer London		London		England	
	2021	2022	2021	2022	2021	2022	2021	2022
Age 2	49%	63%	51%	62%	50%	62%	62%	72%
Age 3 and 4	82%	86%	83%	86%	80%	82%	90%	92%
3 year-olds	76%	83%	79%	83%	77%	80%	87%	90%
4 year-olds	88%	89%	87%	89%	84%	85%	93%	94%

**the DfE England 2021 figures for Age 3 and 4 have been revised up by 2% from the figures presented in the 2021 full CSA, due to a 3% upward correction in the 3 year old percentage.*

Table Summary:

- **2 year-olds**: Take up of funded places has risen sharply in Harrow and across all comparators this year, as demand for provision recovers from previous falls in take-up due to the pandemic. Contrary to last year, take-up in Harrow is now slightly above regional comparators, but remains below the national average:
  - 1% above the outer London borough average
  - 1% above the London average
  - 9% below the national average
- **3 and 4 year-olds**: Take up of funded places in Harrow remains above the London average and is the same as the outer London average, having been 1% below last year. However, it remains below the national average:
  - 4% above the London average
  - On par with the outer London borough average
  - 6% below the national average
- **3 year-olds**: Take-up of funded places in Harrow is now above the London average and is the same as the outer London average having been behind both last year. However, it remains below the national figure:
  - 3% above the London average
  - On par with the outer London borough average
  - 7% below the national average
- **4 year-olds**: Take-up of funded places in Harrow remains above the London average and the same as the outer London average, but below the national average:
  - 4% above the London average
  - On par with the outer London borough average
  - 5% below the national average

[15] *Department for Education: Provision for children under 5 years of age January 2022 & Harrow early education funding headcount data*

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 13: 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	122	50%	58%	55%
State school nurseries	28	4%	100%	46%
Maintained nursery schools	1	100%	100%	100%
Private, voluntary and independent nurseries	111	80%	100%	83%

Table Summary:

- **2 year old funding:** There are 152 childcare providers offering 2 year old funded places across all provision types, a decrease of 3 providers year on year:
  - 100% of maintained nursery schools (1 provider)
  - 80% of PVI nurseries (89 providers): 1% decrease year on year
  - 50% of childminders (61 providers): 8% increase in the childminder provider base year on year
  - 4% of state school nurseries (1 provider): previously no state school nurseries offered 2 year old funded places.

- **3 and 4 year old universal 15 hours:** There are 211 providers offering 3 and 4 year old funded places for the universal 15 hours across all provision types, a decrease of 8 providers year on year:
  - 100% of maintained nursery schools (1 provider)
  - 100% of PVI nurseries (111 providers)
  - 100% of state school nurseries (28 providers)
  - 58% of childminders (71 providers): 5% increase in the childminder provider base year on year

- **3 and 4 year old extended 30 hours:** There are 173 providers offering 3 and 4 year old funded places for the extended 30 hours across all provision types, a decrease of 2 providers year on year:
  - 100% of maintained nursery schools (1 provider)
  - 83% of PVI nurseries (92 providers): 4% increase in the PVI provider base year on year
  - 46% of state school nurseries (13 providers): 2% increase in the state school nursery provider base year on year
  - 55% of childminders (67 providers): 6% increase in the childminder provider base year on year

Extended entitlement – 30 hours funding

There have been five academic years or fifteen school terms since the national roll-out of the extended hours (30 hours) entitlement in September 2017. The entitlement targets 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. Table 14, compares take-up of extended hours places over the past two academic years:

Table 14: Extended hours take-up in Harrow[16]

School term	Children accessing an extended hours place
Autumn 2020	782
Spring 2021	1038
Summer 2021	1269
Autumn 2021	815
Spring 2022	1185
Summer 2022	1410

Table Summary:

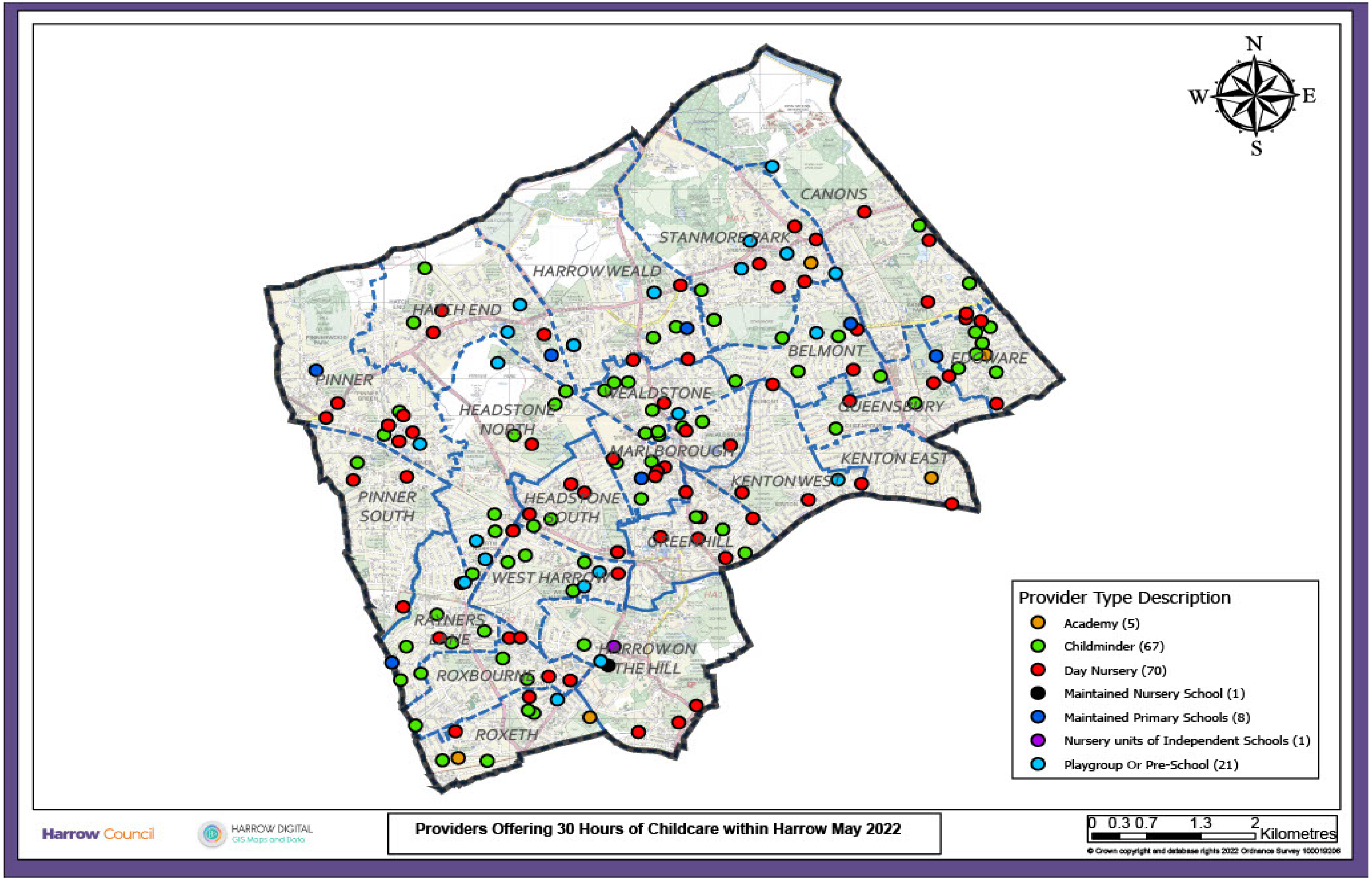
- Children accessing an extended hours place:
  - autumn 20 to autumn 21 - 4% increase
  - spring 21 to spring 22 - 14% increase
  - summer 21 to summer 22 - 11% increase
- The 2021/22 academic year has seen the highest take-up figures for each of the three school terms (compared to equivalent terms in previous years), since the roll-out of the extended hours entitlement in autumn 2017.
- When comparing like for like school terms, for example spring 2021 with spring 2022, there has been growth in the number of children accessing an extended hours place. Although the spring and summer terms 2021 recorded slight falls for the first time when compared to the equivalent terms in the previous year (possibly caused by impacts of Covid on eligibility and working patterns), this has been followed by significant growth into 2022.
- Nationally 348,100, 3 and 4 year-olds were benefitting from the extended early education entitlement, based on the January 2022 early years census, up 6% from the previous year[17]. In comparison, figures from the same (spring) term in Harrow show a 14% increase from the previous year, 8% higher than the national rate of growth in take-up.

Providers offering extended hours

There are 173 providers offering approximately 1439, 30 hour or extended hour places as at May 2022, a decrease of 2 providers but an increase of 13 places in the past year. The providers are mapped on Figure 2.

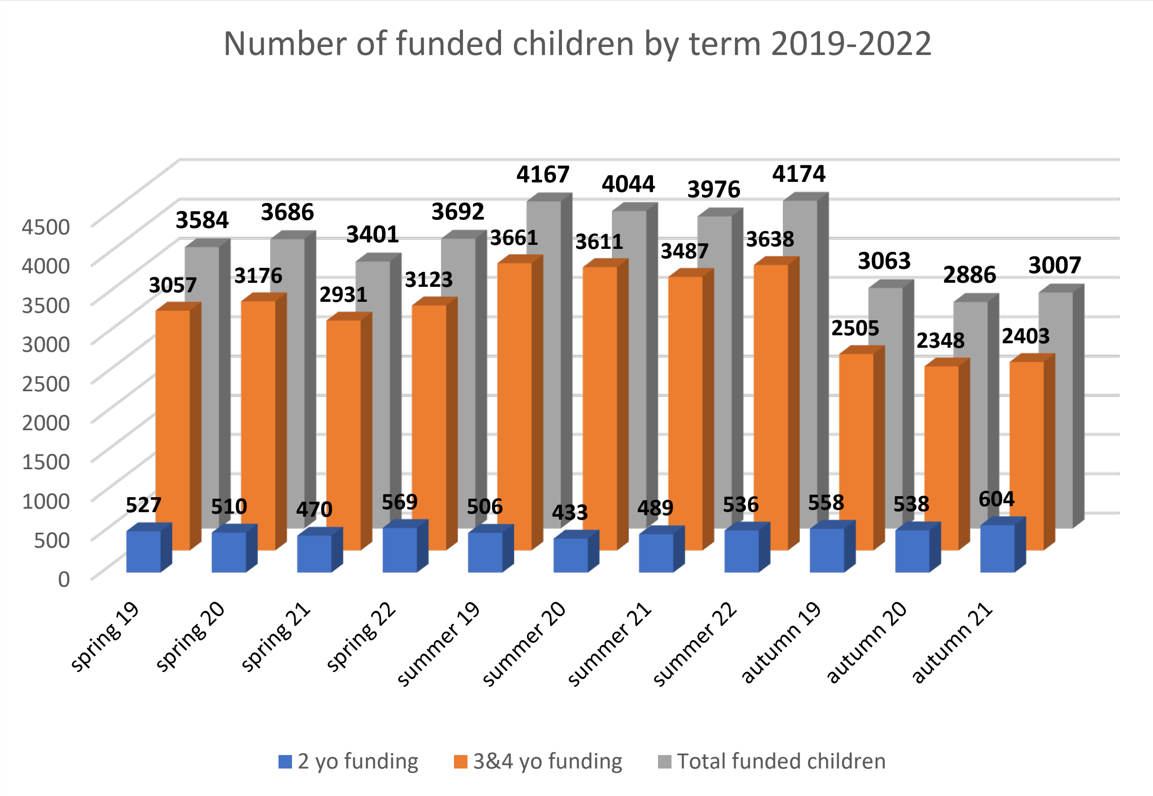
[16] *Harrow early education funding headcount data*
[17] *Department for Education: Provision for children under 5 years of age January 2022*

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



Effects of the Covid-19 pandemic on funded early education

Chart 4: Take-up of 2, 3 and 4 year old funding entitlements



**includes funded places within PVI nurseries, funded childminders, academy school nurseries, one maintained nursery school and extended hours within state school nurseries*

Chart Summary:

- The summer term 2020 onwards have occurred during the Covid-19 pandemic. Funding was protected during the summer and autumn terms 2020, meaning providers could claim for children on-roll or registered to start regardless of actual attendance, otherwise numbers of funded children may have been significantly lower.
- From summer 2020 to summer 2021, numbers of funded children decreased when comparing like-for-like terms prior to the pandemic. However, take-up started to increase again from the autumn term 2021 onwards:
    - Autumn 2021 compared to autumn 2020: 4.2% increase (121 more children).
    - Spring 2022 compared to spring 2021: 8.6% increase (291 more children).
    - Summer 2022 compared to summer 2021: 5% increase (198 more children).
- There has been a steady recovery in the total numbers of funded children over the past year. Numbers of funded children in the spring and summer terms 2022 are now on par with or even very slightly higher than recorded prior to the pandemic. This can be attributed to increased take-up of the means tested 2 year old funding entitlement to some of the highest levels recorded in Harrow, since the entitlement was introduced. Numbers of funded 3 and 4 year-olds have also recovered, but not quite to peak pre-pandemic levels.
- Future numbers of funded children are uncertain and may not increase much further, if at all, when considering a falling birth rate and early years' population. However, if take-up rates of entitlements increase further, numbers of funded children could still rise, albeit not significantly as the early years cohort' is predicted to decline.

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'.[18] Some providers are still awaiting their first full inspection. These providers are excluded from our calculation

Table 15: Childcare provider inspection outcomes (May 2022)

Type of provision	***Total number of providers (excluding those not yet inspected and those with 'Met' or 'Not Met' outcomes)***		***% achieving good or outstanding***	
	2021	***2022***	***2021***	***2022***
Childminders	81	77	96%	94%
Nursery classes in schools *	23	24	100%	100%
Maintained nursery schools	1	1	100%	100%
Private and voluntary nurseries	94	94	99%	95%
Total	**199**	**196**	**98%**	**95%**

** early years grade if available, otherwise overall school grade*

Table Summary:

- Overall, 95% (186 out of 196 providers) of inspected early years' childcare providers in Harrow are graded 'good' or outstanding' by Ofsted. This represents a drop of 3% year on year.
- This is the first time a reduction in quality has been reported since the first sufficiency assessment in 2016, and is the lowest figure reported since 2018. However, this reduction has occurred from a high base set in recent years.
- Quality remains highest in maintained and school nurseries with 100% of providers achieving 'good' or 'outstanding' Ofsted grades.
- Over the past year, PVI nurseries have seen a reduction of 4% and childminders 2%, in the percentage of 'good' or 'outstanding' providers.

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 18 childminders with a 'met' grade and 2 childminders with a 'not

[18] *For more information see https://reports.ofsted.gov.uk/about-our-inspection-reports*

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 16: Regional comparisons of quality[19]

% of providers ‘good’ or ‘outstanding’	*Harrow*		*London*		*England*	
	2021	*2022*	*2021*	*2022*	*2021*	*2022*
Childminders	96%	94%	94%	95%	96%	96%
Nursery classes in schools	100%	100%	94%	94%	88%	89%
Maintained nursery schools	100%	100%	97%	97%	98%	99%
Private and voluntary nurseries	99%	95%	98%	97%	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. Data for Harrow is only based on primary schools that have nursery classes attached.

Table Summary:

- The percentage of ‘good’ or ‘outstanding’ nursery classes in schools and maintained nursery schools in Harrow remains higher than both the regional figures for London and national figures for England, however it has fallen behind both comparators for childminders and PVI nurseries:
  - Nursery classes in schools: 6% higher than London and 11% higher than England. The national figure has increased by 1% over the past year. Harrow has maintained the 100% figure since 2019.
  - Maintained nursery schools: 3% higher than London and 1% higher than England. The national figure has increased by 1% over the past year.
  - PVI nurseries: 2% lower than both London and England. The percentage for Harrow and London has decreased whilst the figure for England remains unchanged. Harrow has gone from being above both comparators last year, to below both this year.
  - Childminders: 1% lower than London and 2% lower than England. Harrow has gone from being higher than London and on par with the national figure last year, to below both comparators this year.

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.

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 enabled the establishment of an Early Years Learning Partnership Group, managed by PVIs, Childminders and maintained schools with nurseries to support system

[19] https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-march-2022 & https://www.gov.uk/government/statistics/state-funded-school-inspections-and-outcomes-as-at-31-december-2021

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 partnership group continues into 2022.

Quality of childcare since Covid-19

All routine Ofsted education inspections were suspended in spring 2020 due to the pandemic, with a phased return into 2021. On-site inspections of registered early years' providers under the education inspection framework, resumed on 4 May 2021.

There has been a slight fall in the overall quality of early years' provision within PVI nurseries and childminding settings since the full Ofsted inspection cycle resumed. Possible reasons for this decline include:

- Disruption to continuity of practice caused by temporary closures of settings during the pandemic.
- Primary focus on firefighting Covid-19: reporting and mitigating virus cases within settings and staff, adapting provision and implementing temporary measures during government restrictions and focus on health and safety to make provision clean and 'Covid-safe'.
- Ongoing staffing issues: regular staff absences caused by Covid cases, practitioners leaving the profession during the pandemic and difficulties in recruiting new staff, all of which disrupts the continuity of teaching, continued professional development and the smooth delivery of the Early Years Foundation Stage (EYFS) framework.
- Harrow Early Years have worked to support and improve the EYFS in PVI nurseries, childminders and schools over recent years in a number of ways. The team has focused on the streamlined delivery of statutory functions. This includes supporting children with SEND in early years' provision and settings judged less than 'Good' by Ofsted. The majority of non-statutory functions have ceased, which meant that some of the extra layers of support for providers have been removed this year.

Feedback from DfE conversations with the Local Authority suggest they are not unduly concerned by this recent drop in quality and that it may only be temporary, as providers adjust to resuming normal practice whilst learning to live and work with covid. The Local Authority will ensure that there is sufficient support for the PVI sector to ensure high quality of provision as previously.

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 Surveys: feedback used in supply and demand sections.
- Harrow DfE returns analysis data: to inform actual supply and demand figures during the Covid-19 pandemic.