

# **Nottingham City Council**

## **Full Childcare Sufficiency Report**

### **2023**

## Introduction

### **Childcare Sufficiency: Local Authority responsibility**

Sufficient, accessible and high quality childcare is an essential factor in promoting school readiness; widening access to employment and study for parents; as well as maximising opportunities for families to benefit from the economic, social and health benefits of employment.

**The Childcare Act 2006** (updated 2016) places a duty on all Local Authorities to secure free provision for eligible 2, 3 and 4 year olds and ensure that there is sufficient childcare for working parents. Whilst the Local Authority is not responsible for providing childcare itself, it is responsible for managing the market to ensure that these duties are met.

### **Monitoring Childcare Sufficiency**

Nottingham City Council publishes a full Childcare Sufficiency Assessment (CSA) report on a three yearly cycle, considering demand, supply and accessibility in order to identify any gaps in sufficiency. This is followed by bi-annual refreshes of the data. The full CSA is an in-depth ward level review that includes a survey of both parents and providers.

### **Purpose**

The purpose of this report is to evaluate the current childcare market in Nottingham City, taking into consideration the impact of the pandemic, the current cost of living crisis and the planned expansion of the early years entitlements and wrap-around childcare (staggered implementation commencing April 2024) to identify where there may be issues, planning what can be done to mitigate against these, in addition to support implementation.

### **Methodology**

Childcare providers, schools, parents and local employers were consulted, via online surveys, at the beginning of the Summer Term 2023. The surveys received 100% response rate from schools and daycare providers. Disappointingly, only 34% of childminders responded, 0% of local employers and only 56 parents.

**Please Note:** Information contained within this report relates to data collated during the Summer Term 2023. The impact of the pandemic on childcare in general continues to emerge and will do so for many months to come. Situations can change rapidly therefore we acknowledge that some of the information within this report may already have changed and be outdated. The Local Authority will be aware of such changes and will ensure that current data is used at all times when planning sufficiency intervention.

### **Childcare Sufficiency Report**

The following report is the Full Childcare Sufficiency Assessment 2023 which covers an overview of the quality of provision, supply, participation and vacancy information broken down into age groups.

All queries should be directed to Catherine Smith, Early Years Programmes Manager, at: [catherine.smith@nottinghamcity.gov.uk](mailto:catherine.smith@nottinghamcity.gov.uk)

### **Childcare Sufficiency: Current Context**

Sufficient, accessible and high quality childcare is significant in promoting school readiness; widening access to employment and study for parents; as well as maximising opportunities for families to benefit from the economic, social and health benefits of employment.

The pandemic continues to impact the childcare sector as some providers struggle to regain their pre-pandemic occupancies. In addition, the current economic crisis, shifting attitudes to employment and working arrangements (e.g. hybrid working) and rising costs for families and businesses alike are impacting on childcare business's short, medium and long term sustainability. It is essential to keep a close eye on the childcare market at this time, particularly in light of the [expansion of early years entitlements](#) from April 2024 onwards.

### **What are the Childcare Sufficiency Assessments telling us?**

The quality of childcare remains high in Nottingham with 97% of day nurseries and pre-schools and 97% of childminders in the private, voluntary and independent (PVI) sectors graded as newly registered, met, good or outstanding by Ofsted.

Based upon the current return, there are sufficient childcare places across all age groups. This is based on the number of vacancies which currently exist. There has been an improvement on the availability of wrap-around places and, in addition, demand has increased with take up of breakfast and after school provision exceeding 70%. Holiday club places continue to fall significantly, however this is likely to be as a result of the lack of response from the independent holiday club provision to the CSA Provider Survey 2023. There has been a small decrease in the overall number of childcare providers in the City, however, this remains below the national average. Overall, vacancy rates have increased from 30% in the Summer Term 2022 to 41% this Summer.

Our immediate priorities continue to be the recovery of early years funded provision back to pre-pandemic levels and above, support to the sector with regards to the ongoing staffing crisis which we know is limiting recovery and expansion across the sectors and maintaining the monitoring, support and intervention to the early years and childcare sector, through the [Provider Support Framework](#), with regards to business sustainability and quality of service.

The **Strategic Council Plan for 2023-27** sets out what Nottingham City Council aims to deliver for residents over the next four years. There are ten high level outcomes, of which the following are particularly relevant for our sector:

#### **Outcome – Child-Friendly Nottingham**

- Protect and safeguard vulnerable children and young people – delivering our statutory duties.
- Work with our partners to develop and deliver effective strategies and programmes to meet children's educational needs and our statutory obligations and improve educational attainment in the City.
- Improve access to education for children with additional needs, such as Special Educational Needs and Disability (SEND) and children in care.
- Number of childcare places for eligible two-year-olds / free nursery education.

## SECTION 1: The Supply of Childcare Services in Nottingham City

In order to assess childcare sufficiency, we need to identify the number of childcare places (supply) and match with current and future demand.

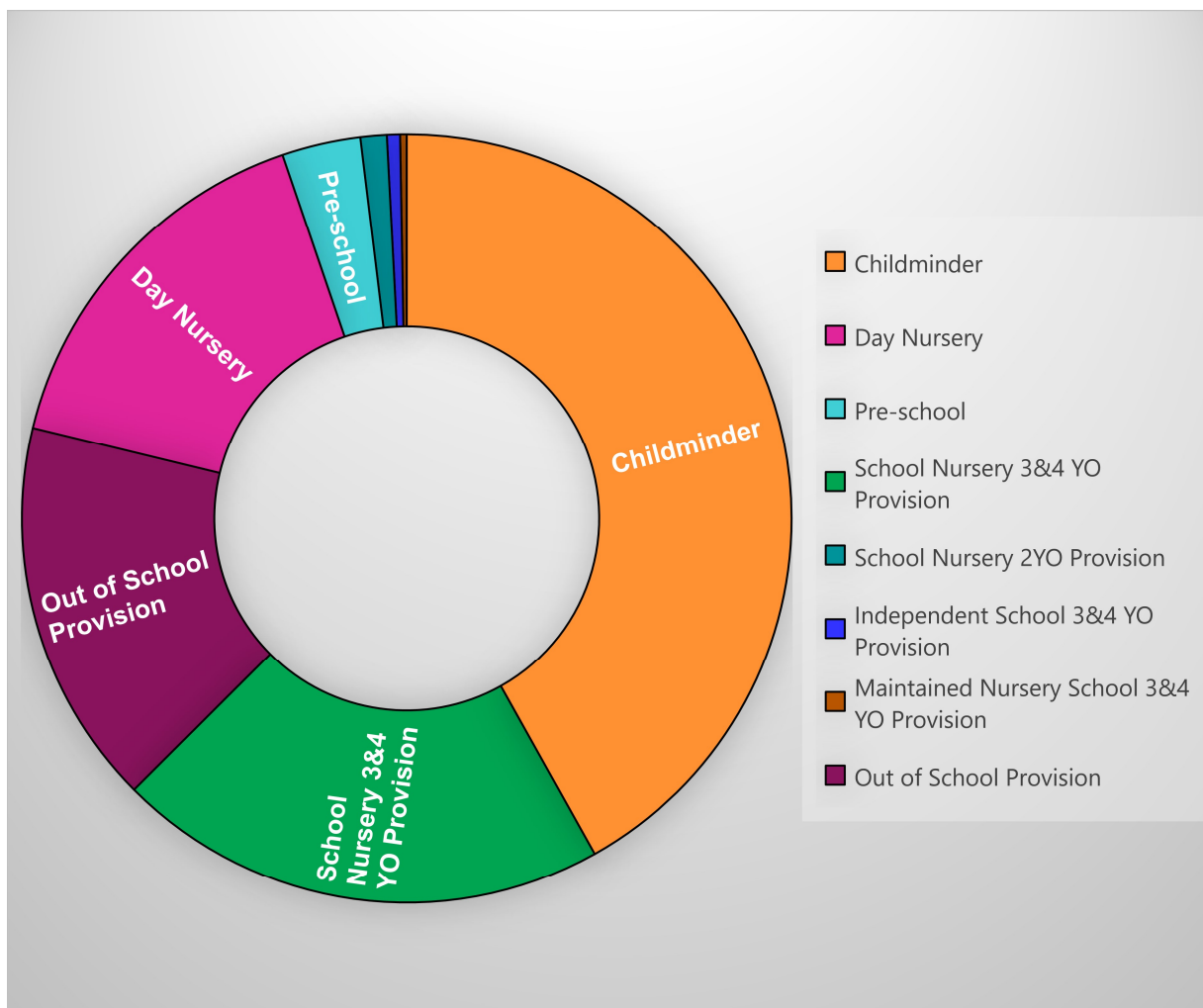
The assessment tracks the number of childcare places which have closed since the last [CSA Report](#) (Summer 2022) and the number of new childcare places. We look at this on a City-wide level and at ward level. This helps us to understand the childcare offer and any sufficiency concerns on a community level to enable targeted intervention.

The assessment includes provision for pre-school and school age children and explores availability during term time, during the holidays and all year round. We look at Ofsted inspection data and provision for children with SEND to ensure the assessment encompasses accessible, inclusive and quality childcare services.

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## SECTION 1a: Overview of Childcare Services in Nottingham



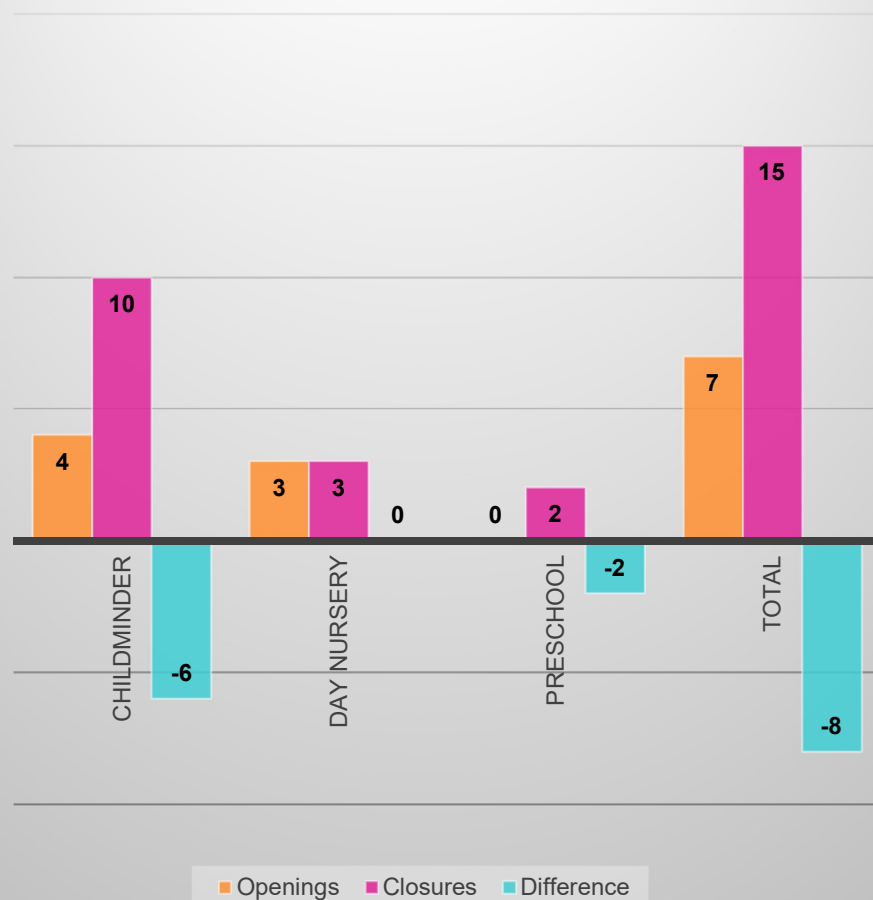
In Nottingham, there are a total of 363 registered early years and childcare providers. This includes childminders, day nurseries, pre-schools and school nurseries. This data is based on information held within the Council's [ASKLiON](#) website, which is maintained by the FIS Team ([Families Information Service](#))

Out of 363 registered providers and primary schools in Nottingham, a total of 175 (59%) responded to the Early Years Provider Survey. Much of the data within this report is based upon this survey. We must therefore exercise a degree of caution when scrutinising the data within this report due to missing data from schools and the childminder sector. 74% of childminders did not respond to the survey.

<b>Childminders</b>	<b>152</b>
<b>Day Nurseries</b>	<b>58</b>
<b>Pre-Schools</b>	<b>12</b>
<b>School Nurseries 3&amp;4 YO Provision</b>	<b>75</b>
<b>School Nurseries 2 YO Provision</b>	<b>4</b>
<b>Independent Schools 3&amp;4 YO Provision</b>	<b>2</b>
<b>Maintained Nursery School 3&amp;4 YO Provision</b>	<b>1</b>
<b>Out of School Provision</b>	<b>59</b>

**SECTION 1b: Registered Childcare Provision: Openings and Closures** *(sourced from Ofsted data and Childminder Agency data)*

### January 2022 to July 2023



### What is the data telling us?

Overall, Nottingham has seen a 3.5% decrease in the number of registered childcare providers since January 2022. The most recent comparative national data reports an 8% drop in the number of childcare providers. Most of this overall decline is due to the fall in childminders, which is mirrored in Nottingham <https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-august-2022>

There continues to be interest in childminder briefing sessions for those considering childminding as a business. There are 4 prospective childminders currently working towards Ofsted registration.

Two most recent day care closures (1 preschool, 1 day nursery) were reported to be as a result of increased business costs, primarily building rental charges. One located in a ward with healthy participation of the Early Years Entitlements, the second in a ward with one of the lowest participation levels across the city.

### Risks:

Rising cost of living, business costs, significant recruitment challenges and a change in the demand for childcare (more parents using informal childcare arrangements), are starting to have a measurable impact on the provision of childcare in Nottingham. Despite there being sufficient childcare places across the city, we need to consider the possibility of the demand for childcare rising, especially in light of the Government's expansion of early years entitlements from April 2024.

**SECTION 1c: Ofsted Inspection and Quality of Childcare** *(sourced from local Ofsted data and Childminder Agency data)*

Ofsted inspection grades as of 13.07.2023	Outstanding	Good	Met	Requires Improvement	Inadequate	Not Met	Newly Registered	Total	Proportion Good/Outstanding/New/Met
Childminder	6	86	32	0	1	3	22	150	97%
Day Nursery/ Pre-School	2	57	2	0	2	0	7	70	97%
School	4	60	0	4	0	0	6	74	95%

97% of funded 2, 3 and 4 year olds, accessed early years provision in settings graded as good, outstanding, new or met by Ofsted. This is in line with national quality statistics: <https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-august-2022>)

**Early Years Foundation Stage Statutory Framework:**

September 2023 saw the implementation of the revised statutory Early Years Foundation Stage (EYFS) framework for all registered providers working with early years. There are three key changes:

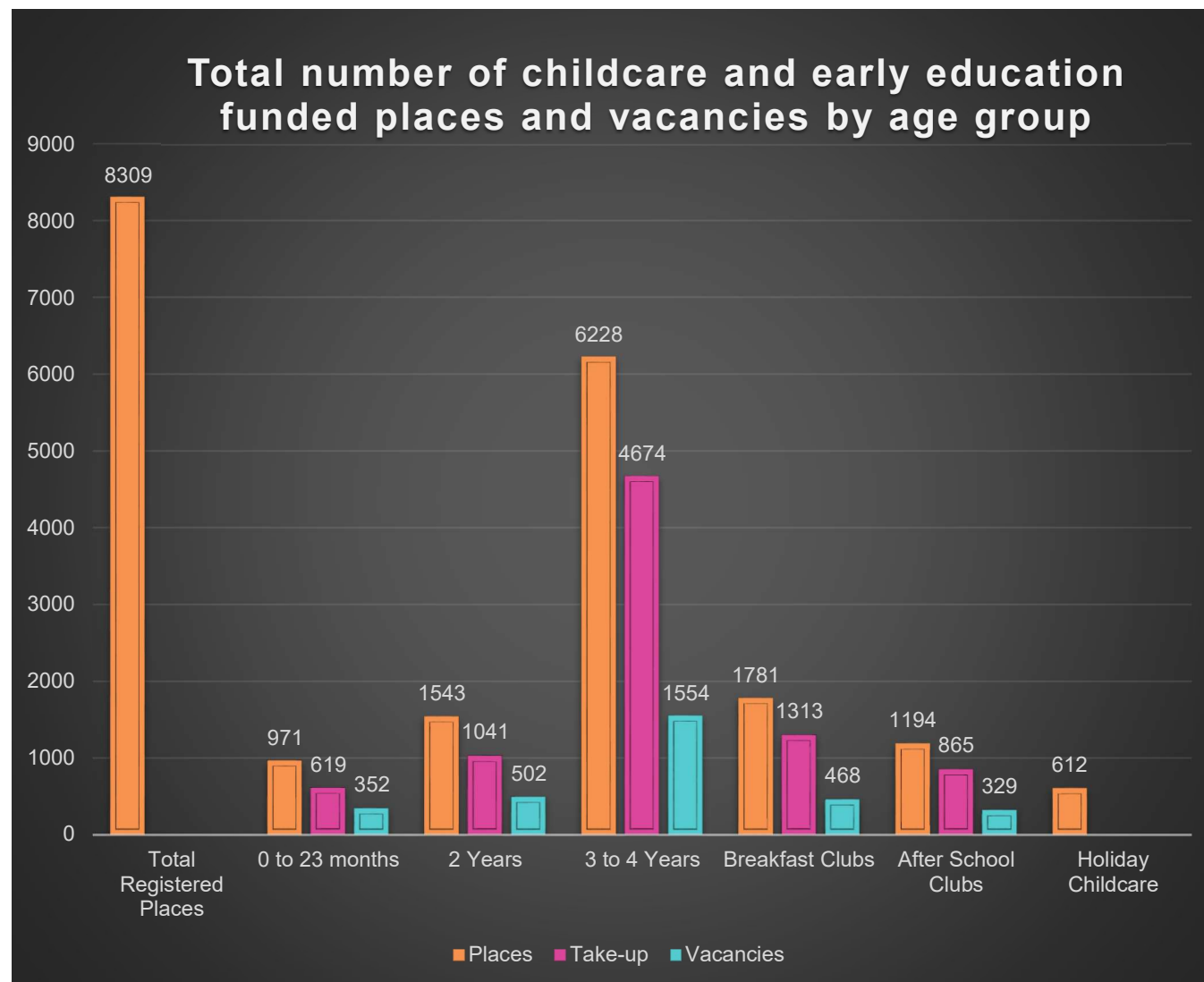
- Change the statutory minimum staff: child ratios for children aged two from 1:4 to 1:5
- Clarification that childminders can care for more than the currently-specified maximum of three young children, when caring for siblings of children they already care for, or when caring for their own child
- Clarification that “adequate supervision” whilst children are eating means that children must be within sight and hearing of an adult

A further EYFS consultation closed in July 2023. The proposals within it build on the measures above in order to offer providers increased flexibility, alleviate known burdens and to support providers to prepare for implementation of the extended early years entitlements. More about the extended entitlements can be found on page 29 of this report.

**DfE Early Years Recovery Programme**

The DfE's Early Years Recovery Programme is part of the government's £180m programme of support for early years, focused on supporting practitioners and leaders, who are key to addressing the effects of the pandemic on the youngest children and supports the aim of improving outcomes and closing the attainment gap at age 5. To date, 40 childcare settings/schools are benefitting from one or more aspects of the Programme.

## SECTION 1d: Total Number of Childcare Places (taken from the Childcare Sufficiency Assessment Provider Survey Summer Term 2023)



### SUMMARY

#### Citywide:

- Although there has been a slight drop in childcare places, there remains, on average, 1 childcare place for every 6 children
- 41% of childcare places are currently vacant (not including holiday care provision).
- 2% decrease in childcare places overall. 2 year old provision has seen the greatest decrease at 15% of places. 3 to 4 year old provision has seen an increase of 8%.
- Holiday childcare places decreased by 26% however, none of the independent holiday care providers in the city completed the CSA Provider Survey therefore their places could not be counted.
- Of those schools with a completed survey, 25% have breakfast club provision.

## SECTION 1e: Provision for Children who have Special Educational Needs and Disabilities (SEND) *(sourced from the Childcare Sufficiency Assessment Provider Survey Summer Term 2023)*

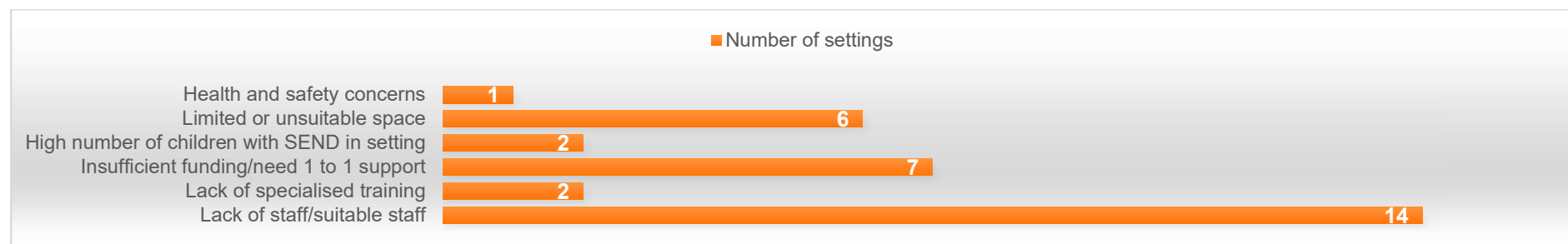
### Local Provision of SEND (Schools and PVI)

#### From the Summer Term 2023 Survey:

- 69% of providers (schools and PVI) reported supporting a child, or children, with SEND. This is an increase of 15% from Summer 2022
- Total number of children with SEND reported as being supported by the early years sector is 503, of which 27% are in receipt of SEND funding (HLN or Inclusion Funding)
- Of the 503 children with SEND - 81 are known to be in receipt of DLA, of which only 50% are receiving Disability Access Funding

When asked 'Have you been able to accommodate all children with SEND?' 24% of early years providers answered **no**. This is a decrease of 7% from Summer Term 2022.

#### The reasons given for not being able to accommodate children with SEND are as follows:



### Level 3 SENCO Training

The accredited Level 3 Early Years SENCO training is funded by the DfE and delivered by the Best Practice Network. The qualification is nationally available however places are prioritised in line with the DfE's guidance of the greatest need and impact. Completing the Early Years SENCO qualification provides Early Years SENCO's with the knowledge, understanding and skills needed to perform the role effectively and ensure that children with SEND get the support they deserve. To date, six Nottingham City SENCO practitioners have completed the accreditation with a further three waiting to enrol.

Further information can be accessed here: <https://www.bestpracticenet.co.uk/early-years-SENCO>

Ofsted inspection reports are a good way for parents to get a sense of what childcare providers offer, the quality of their provision, how children are safeguarded and their provision for children with SEND.

Ofsted report on the quality of SEND support within childcare provision during inspection. Here are just a few examples of feedback taken from city childcare Ofsted inspection reports within the past year.

Children with special educational needs and/or disabilities (SEND) are well supported. The manager and staff work well with other professionals and parents to make sure children receive the support they require. This helps children with SEND to make good progress. The manager carefully considers how additional funding is spent, to have the most impact for children.

Support for children who have special educational needs and/or disabilities (SEND) is a real strength of the nursery. Staff identify additional needs quickly, accessing external agencies and creating plans to meet children's individual needs. As a result, all children make good progress in their learning and development. Parents of children with SEND highly praise the nursery and its whole team. They commend the difference they have made to both the children and the whole family.

Staff adapt their teaching when working with children with SEND. For example, they take activities to children's preferred learning spaces. This means the curriculum is accessible to all children.

The management team works together with outside agencies to ensure that children with special educational needs and/or disabilities (SEND) are well supported. They ensure that relevant support is sought without delay. This helps children to make good progress.

Staff work effectively with other agencies and professionals to support children, including those with special educational needs and/or disabilities. For example, staff have close links with health visitors, speech and language therapists and family support teams. Staff identify and share information about children's emerging needs to ensure that children and families receive timely interventions and consistent support.

Managers and staff support children with special educational needs and/or disabilities effectively. They identify children who may need additional support and work closely with external agencies to ensure that all children receive early help when required. Parents speak highly about the support they receive as a family because of this partnership working with external agencies.

## SECTION 2: Current Uptake of Childcare Places


To get a true sense of sufficiency, not only do we need to measure the number of childcare places against the number of children (in each age range, in each city ward) – we also need to look at how many of the city's childcare places are occupied and how many are vacant.

This gives us a sense of where the pressure points are across the city which need our attention around expansion of childcare places, and also demonstrates where we need parental engagement strategies in order to increase participation, particularly around the early years entitlement.






















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**KEY: Pages 15, 16 and 17:**

	Low		Below Average		Average		Good Level
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**SECTION 2a: Birth to Two Year Old Places and Uptake** *(sourced from the Childcare Sufficiency Assessment Provider Survey Summer 2023)*

		<b>A</b>	<b>B</b>	<b>B / A x 100</b>	Summer 2022 comparison	
	Number of children in ward (0 to 2 yrs.)	Number of available childcare places	Uptake of childcare places	Uptake Rate		
Aspley	731	34	18	53%	43%	
Basford	492	97	38	39%	40%	
Berridge	538	23	10	43%	46%	
Bestwood	592	9	7	78%	43%	
Bilborough	471	28	24	86%	84%	
Bulwell	562	39	23	59%	62%	
Bulwell Forest	345	58	30	52%	71%	
Castle	128	36	26	72%	88%	
Clifton East	430	18	12	67%	71%	
Clifton West	277	8	3	38%	10%	
Dales	612	13	11	87%	100%	
Hyson Green & Arboretum	566	57	32	56%	53%	
Leen Valley	215	15	5	33%	39%	
Lenton & Wollaton East	300	141	123	87%	85%	
Mapperley	391	39	25	64%	56%	
Meadows	270	13	7	54%	38%	
Radford	272	82	41	50%	23%	
Sherwood	406	118	85	72%	64%	
St Ann's	539	57	23	40%	33%	
Wollaton West	387	86	64	74%	74%	
<b>Nottingham</b>	<b>8,524</b>	<b>971</b>	<b>607</b>	<b>63%</b>	<b>64%</b>	

**SECTIONS 2b: Two Year Old Places and Uptake** *(sourced from the Childcare Sufficiency Assessment Provider Survey Summer 2023)*

Places and uptake for children aged two years (funded and non-funded provision)

		<b>A</b>	<b>B</b>	<b>B / A x 100</b>	Summer 2022 comparison	
	Number of children in ward (2 yrs.)	Number of available childcare places	<b>Uptake</b> of childcare places	<b>Uptake Rate</b>		
Aspley	405	86	62	72%	69%	↑
Basford	253	145	77	53%	63%	↓
Berridge	257	80	48	60%	61%	↓
Bestwood	285	36	17	47%	54%	↓
Bilborough	234	44	28	64%	77%	↓
Bulwell	225	65	44	68%	74%	↓
Bulwell Forest	167	79	57	72%	74%	↓
Castle	43	40	28	70%	79%	↓
Clifton East	203	39	26	67%	81%	↓
Clifton West	132	36	35	97%	77%	↑
Dales	314	29	21	72%	82%	↓
Hyson Green & Arboretum	271	128	63	49%	64%	↓
Leen Valley	100	44	19	43%	47%	↓
Lenton & Wollaton East	161	120	102	85%	86%	↓
Mapperley	193	78	47	60%	79%	↓
Meadows	150	31	18	58%	74%	↓
Radford	133	136	88	65%	56%	↑
Sherwood	201	147	123	84%	65%	↑
St Ann's	265	83	64	78%	49%	↑
Wollaton West	200	97	74	76%	86%	↓
<b>Nottingham</b>	<b>4,192</b>	<b>1543</b>	<b>1041</b>	<b>67%</b>	<b>68%</b>	↓

**SECTION 2c: Three and Four Year Old Places and Uptake – All Providers** *(sourced from the Childcare Sufficiency Assessment Provider Survey Summer 2023)*

Places and uptake for children aged three and four years old (funded and non-funded provision)

		<b>A</b>	<b>B</b>	<b>B / A x 100</b>	Summer 2022 comparison	
	Number of children in ward (3 and 4 yrs.)	Number of available childcare places	Uptake of childcare places	Uptake Rate		
Aspley	790	259	199	77%	56%	⬆️
Basford	484	592	441	74%	79%	⬇️
Berridge	481	329	244	74%	69%	⬆️
Bestwood	580	349	283	81%	67%	⬆️
Bilborough	516	489	319	65%	71%	⬇️
Bulwell	515	340	260	76%	78%	⬇️
Bulwell Forest	326	337	245	73%	82%	⬇️
Castle	64	56	43	77%	94%	⬇️
Clifton East	480	385	329	85%	88%	⬇️
Clifton West	268	79	70	89%	75%	⬆️
Dales	542	307	175	57%	61%	⬇️
Hyson Green & Arboretum	536	418	309	74%	70%	⬆️
Leen Valley	191	186	100	54%	44%	⬆️
Lenton & Wollaton East	328	259	208	80%	88%	⬇️
Mapperley	380	311	184	59%	94%	⬇️
Meadows	260	145	83	57%	87%	⬇️
Radford	240	296	325	75%	80%	⬇️
Sherwood	421	431	396	92%	75%	⬆️
St Ann's	563	334	264	79%	58%	⬆️
Wollaton West	427	326	299	91%	87%	⬆️
<b>Nottingham</b>	<b>8,392</b>	<b>6228</b>	<b>4776</b>	<b>77%</b>	<b>74%</b>	⬆️






















**SECTION 2d: Out of School Places and Uptake** *(sourced from the Childcare Sufficiency Assessment Provider Survey Summer 2023)*

	Number of children in ward (4-11)	Holiday Scheme Places	Breakfast Club Places	Breakfast Club % Uptake	After School Club Places	After School Club % Uptake
Aspley	3,171	68	69	🏠 49%	54	🏠 65%
Basford	1,934	50	152	🏠 72%	95	🏠 56%
Berridge	1,815	12	96	🏠 82%	50	🏠 82%
Bestwood	2,049	28	75	📉 52%	56	📉 46%
Bilborough	2,059	13	137	🏠 85%	17	🏠 71%
Bulwell	2,035	35	254	🏠 76%	61	📉 49%
Bulwell Forest	1,328	37	104	🏠 89%	114	🏠 91%
Castle	211	0	0	📈 0	0	📈 0
Clifton East	1,788	41	174	📉 74%	74	🏠 66%
Clifton West	959	6	33	🏠 91%	6	🏠 50%
Dales	2,037	15	88	📉 82%	69	🏠 87%
Hyson Green & Arboretum	2,014	16	39	📉 82%	59	📉 58%
Leen Valley	791	12	12	🏠 42%	12	📉 58%
Lenton & Wollaton East	1,072	68	152	🏠 93%	152	🏠 93%
Mapperley	1,415	15	28	🏠 82%	76	📉 74%
Meadows	1,010	9	7	📈 29%	7	🏠 71%
Radford	853	88	85	📉 68%	45	🏠 71%
Sherwood	1,508	32	50	🏠 86%	66	🏠 94%
St Ann's	1,757	26	76	📉 58%	100	🏠 78%
Wollaton West	1,718	41	150	🏠 61%	111	🏠 86%
<b>Nottingham</b>	<b>31,524</b>	<b>612</b>	<b>1781</b>	<b>🏠 74%</b>	<b>1224</b>	<b>🏠 73%</b>

**SECTION 2e: Early Years FUNDED Provision - Two Year Old Uptake** *(sourced from the Summer Term 2023 Early Years Headcount, measured against the associated DWP data of potentially eligible children)*

		Number of potentially eligible children in ward	Take-up PVI	Take-up schools	Take-up %	Summer Term 2022 comparison	
SSBC	Aspley	152	105	3	71%	80%	↓
	Basford	77	57	1	75%	65%	↑
	Berridge	72	26	18	61%	51%	↑
	Bestwood	117	83	3	74%	66%	↑
	Bilborough	111	63	1	58%	65%	↓
SSBC	Bulwell	127	88	4	72%	69%	↑
	<b>Bulwell Forest</b>	49	23	0	47%	62%	↓
	Castle	6	6	0	100%	67%	↑
	Clifton East	73	35	9	60%	52%	↑
	<b>Clifton West</b>	20	7	0	35%	58%	↓
	<b>Dales</b>	116	56	0	48%	56%	↓
SSBC	Hyson Green & Arboretum	99	41	9	51%	51%	↔
	<b>Leen Valley</b>	21	10	0	48%	53%	↓
	Lenton & Wollaton East	49	30	5	71%	60%	↑
	Mapperley	52	26	7	64%	58%	↑
	Meadows	49	22	4	53%	44%	↑
	Radford	51	27	17	86%	73%	↑
	Sherwood	38	26	0	68%	59%	↑
	St Ann's	104	57	19	73%	73%	↔
SSBC	Wollaton West	24	18	0	75%	64%	↑
	Other	0	69	1			
	<b>Nottingham</b>	<b>1407</b>	<b>875</b>	<b>101</b>	<b>69%</b>	<b>66%</b>	↑

**SECTION 2f: Early Years UNIVERSAL FUNDED Provision - Three and Four Year Old Uptake** *(sourced from the Summer Term 2023 Early Years Headcount)*

		Number of children in ward (3 and 4 yrs.)	Take-up PVI	Take-up schools	Take-up %	Summer 2022 comparison
SSBC	Aspley	612	192	201	64%	73% 
	Basford	382	112	187	78%	81% 
	Berridge	451	103	219	71%	73% 
	Bestwood	460	116	247	79%	76% 
	Bilborough	445	133	188	72%	74% 
SSBC	Bulwell	455	109	213	71%	68% 
	Bulwell Forest	272	54	174	84%	75% 
	Castle	113	28	19	42%	42% 
	Clifton East	367	45	253	81%	79% 
	Clifton West	200	58	74	66%	61% 
	Dales	453	76	136	47%	50% 
SSBC	Hyson Green & Arboretum	467	140	211	75%	75% 
	Leen Valley	223	77	64	63%	83% 
	Lenton & Wollaton East	252	63	113	70%	69% 
	Mapperley	336	81	130	63%	64% 
	Meadows	182	52	119	94%	80% 
	Radford	231	60	102	70%	71% 
	Sherwood	350	109	93	58%	58% 
	St Ann's	442	93	242	76%	73% 
SSBC	Wollaton West	343	140	94	68%	72% 
	Other		360	109		
	<b>Nottingham</b>	<b>7,036</b>	<b>2201</b>	<b>3188</b>	<b>77%</b>	<b>77%</b> 

## SECTION 2g: Early Years EXTENDED FUNDED Provision (30 hours) - Three and Four Year Old Uptake

(sourced from the Summer Term 2023 Early Years Headcount)

		Number of potentially eligible children in ward	Take-up PVI	Take-up schools	Uptake Rate
SSBC	Aspley	121	58	43	83%
	Basford	76	54	63	155%
	Berridge	89	42	38	90%
	Bestwood	91	44	84	140%
	Bilborough	88	62	43	119%
SSBC	Bulwell	90	37	43	89%
	Bulwell Forest	54	26	59	158%
	<b>Castle</b>	22	6	0	27%
	Clifton East	73	25	87	154%
	Clifton West	40	38	23	154%
	Dales	90	22	26	53%
SSBC	Hyson Green & Arboretum	92	43	6	53%
	Leen Valley	44	47	6	120%
	Lenton Abbey & Wollaton East	50	25	6	62%
	Mapperley	67	41	27	102%
	Meadows	36	15	13	78%
	<b>Radford</b>	46	17	6	50%
	Sherwood	69	72	31	148%
	St Ann's	88	30	37	77%
SSBC	Wollaton West	68	102	21	181%
	Other		229	47	
	<b>Nottingham</b>	<b>1395</b>	<b>1035</b>	<b>709</b>	<b>125.0%</b>

## SECTION 3: Demand for Childcare

This section contains the results from the Childcare Sufficiency Assessment Parent Survey 2023. The survey was completed using Microsoft Forms. The survey was accessible via laptop/computer or mobile phone and the immersive reader function was enabled. The form was also translatable on request.

**Survey distribution and parental engagement (face to face and via local and social networks):** via [AskLion](#) website, CityCare, Small Steps Big Changes, Nottingham Women's Centre, NCC Social Care, NCC Early Help, childcare providers and schools, SEND support services, Literacy Trust volunteers, Family Mentors, Families Information Service and others.

A total of 56 parents (involving 93 children between the ages of 0 and 18 years of age) responded to the Childcare Sufficiency Assessment Parent Survey this year, which is a drop of 66% compared to the last survey taken in 2020. This is a disappointing return and will need to be considered carefully when planning future surveys and parental engagement.

**Page 19**    **Parents Currently Accessing Formal Childcare**

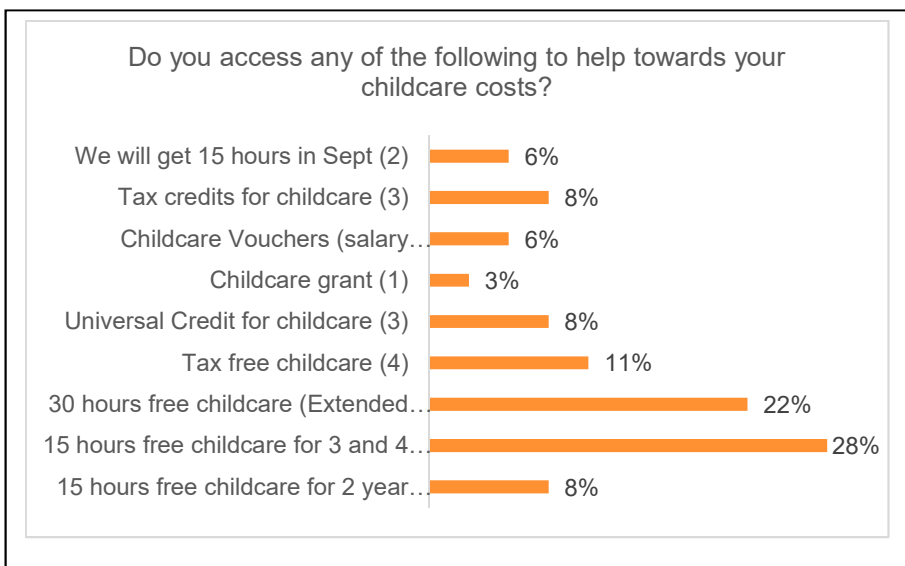
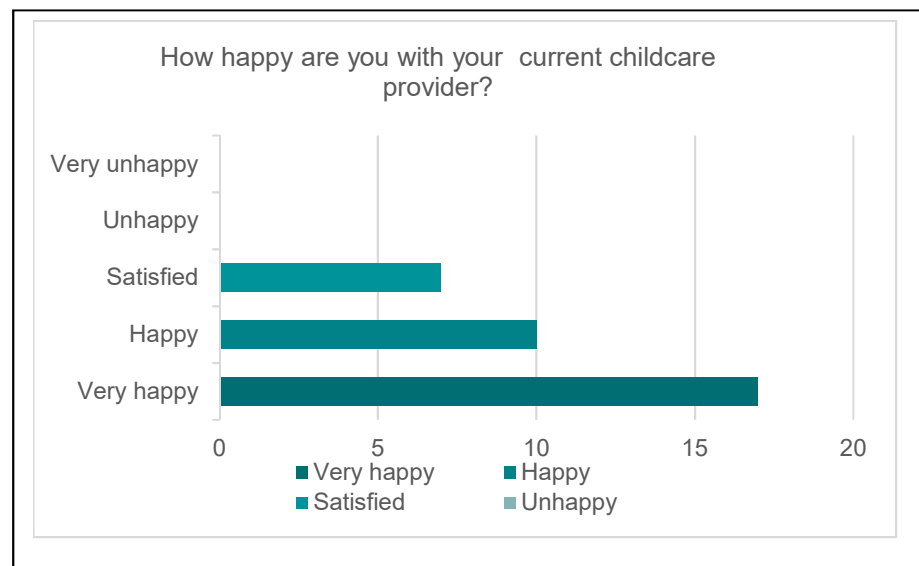
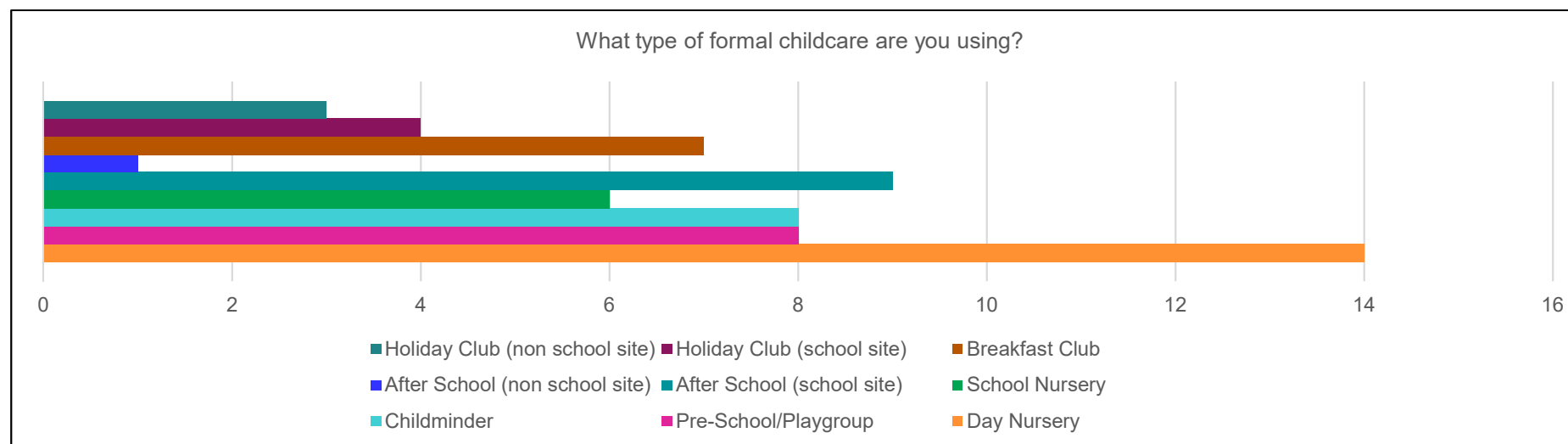
**Page 20**    **Parents Not Accessing Formal Childcare**

**Page 21**    **Childcare Information Services**

**Page 22**    **Future Childcare Needs**

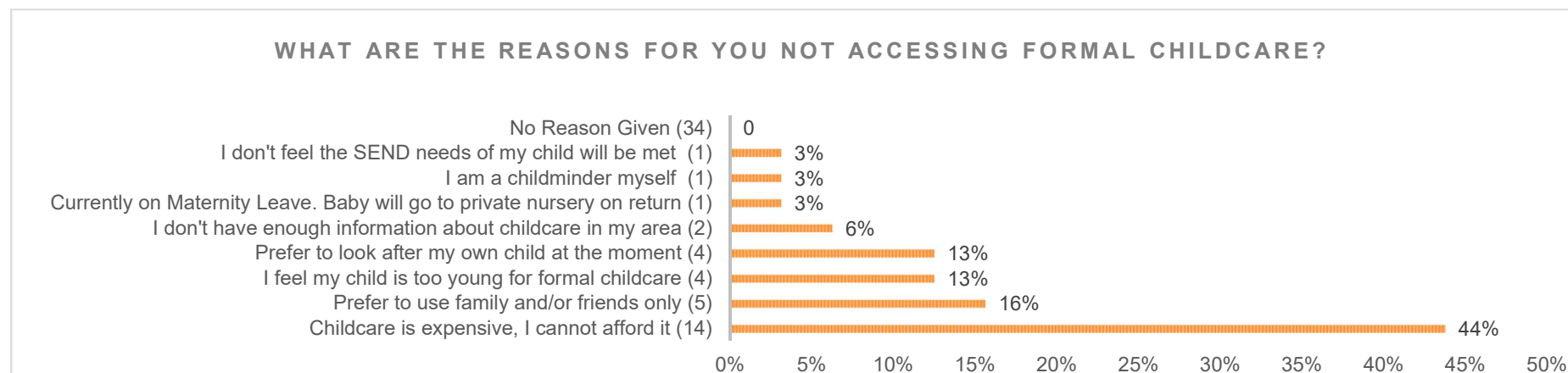


## SECTION 3a: Parents Currently Accessing Formal Childcare *(sourced from the Childcare Sufficiency Parent Survey 2023)*

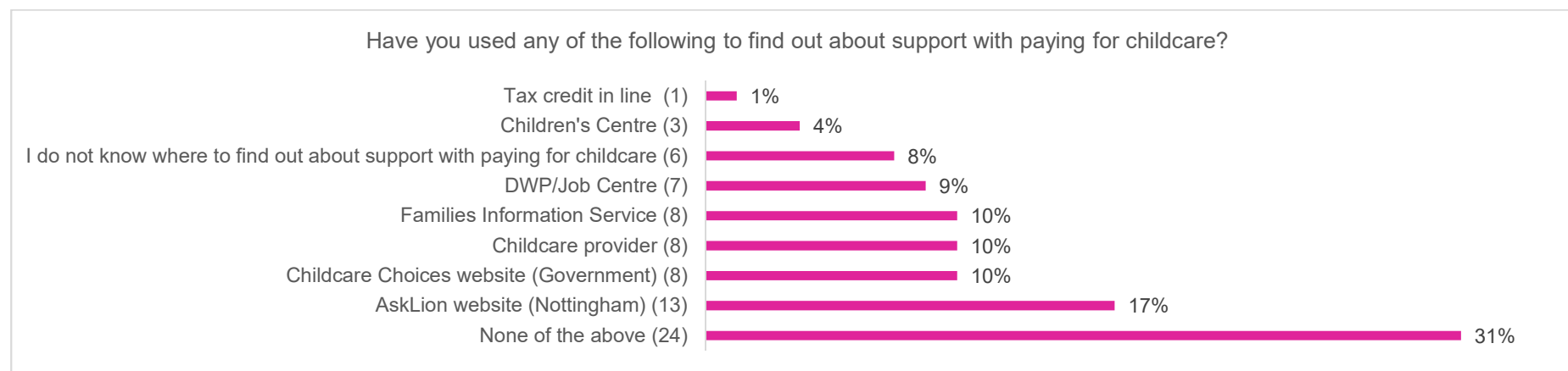


## SECTION 3b: Parents Not Accessing Formal Childcare (sourced from the Childcare Sufficiency Parent Survey 2023)

Of the 56 respondents, 39% did not use formal childcare (for example, day nursery, childminder or school provision). The reasons given for this are as follows:

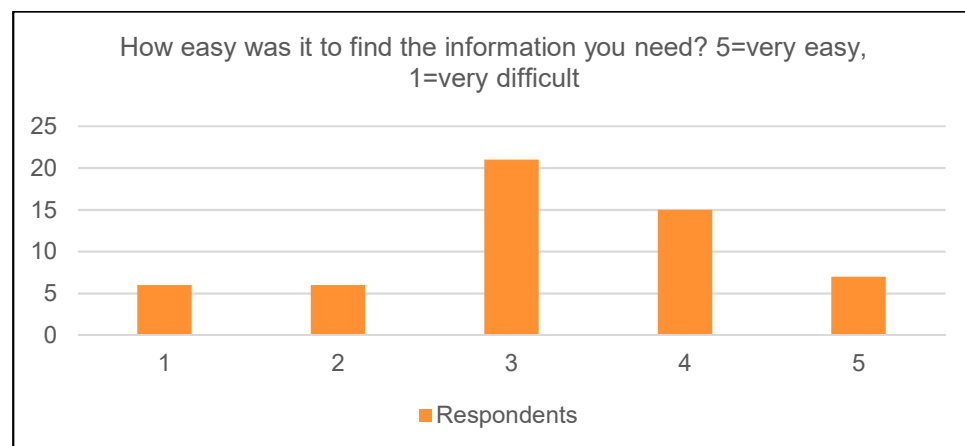
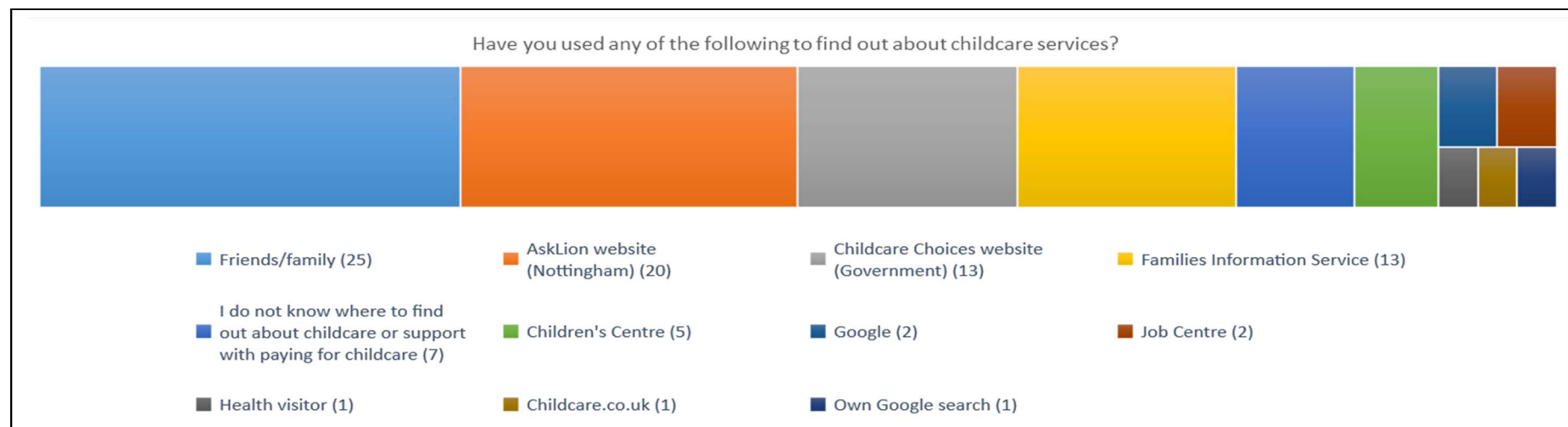


Cost is a significant factor for parents when choosing childcare services. Particularly at a time when the cost of living continues to rise. Government support is available to make childcare more affordable. We were interested to know if parents were aware and/or had accessed any government funding to support with childcare costs:



## SECTION 3c: Childcare Information Services (sourced from the Childcare Sufficiency Parent Survey 2023)

Finding childcare can be challenging. In the city we are fortunate to have a rich, mixed economy of childcare places in the private, voluntary and independent childcare sector (day nurseries, pre-schools and childminders) and schools. For parents, knowing what to look for in quality childcare provision and where to find this information can be confusing and may deter parents from returning to work, training or accessing services for themselves and their families. It is essential therefore that the information services offered locally and nationally for families are visible.

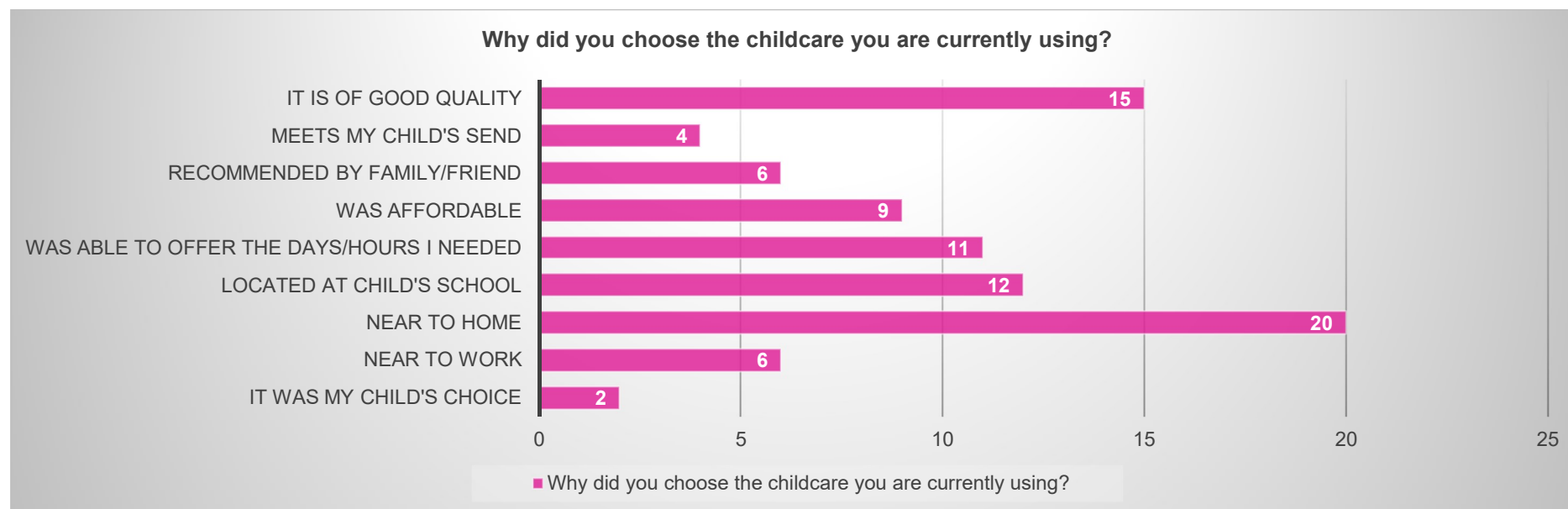


The parent survey has provided an insight into where parents go to access information on childcare services. It isn't surprising that, first and foremost, parents go to family and friends for advice. Just under 50% of respondents have accessed the Council's information services (ASKLiON and the Families Information Service), this is encouraging but there is work to be done to make these services more visible across the City. We also need to consider partner engagement to ensure those working directly with families are equipped to support and signpost parents accordingly. This is particularly relevant as the City's Family Hub Service develops.

## SECTION 3d: Future Childcare Needs (sourced from the Childcare Sufficiency Parent Survey 2023)

In order to understand future childcare needs, the parent survey explored demand by - type of provision, frequency in days of the week, frequency across the week and frequency across the year. The results demonstrated a greater demand for **part time provision** that is available **all year round**. Respondents stated a preference for childcare provision within **day nurseries open all year round** or **school nurseries with wrap-around services**. **Holiday club provision** also rated highly as a childcare requirement.

Respondents currently accessing childcare described the determining factors for their current choice of childcare provision:



### Additional parent comments

*I have 3 children and work part time so finding affordable childcare in school holidays is very difficult*

*Trying to work out childcare costs is near impossible and has been a barrier for our family*

*Instead of paying a childcare provider to look after my child I would prefer financial support so I could stay at home to look after him myself*

*I can get back 80% back which I'm grateful for but I don't have it to pay upfront. So rely on friends more now.*

*I need childcare support for my two year old but I don't qualify. 3 years is a long time to get free childcare.*

## SECTION 4: Additional, Influential Factors

There are many influential factors connected to childcare supply and demand. These include – current economic climate affecting families and businesses, access to employment and working patterns, birth rates, housing development (particularly those developing family homes), training and supply of early years practitioners, availability and access to government funding (childcare costs) and the expansion of early years entitlements.

**Page 24**      **Current Economic Climate on Childcare Services**

**Page 25**      **Current Economic Climate on Families**

**Page 26**      **Demographic Information**

**Page 27**      **Demographic Information (continued)**

**Page 28**      **Employers and Employment**

**Page 29**      **Expansion of Early Years Entitlements**



## SECTION 4a: Current Economic Climate on Childcare Services

### **Sustainability of Childcare Business: Current Position** *(sourced from the Childcare Sufficiency Assessment Provider Survey Summer Term 2023)*

- 30% of providers have seen an increase in occupancy compared to 37% in the Summer Term 2022
- 22% of providers have seen a decrease in occupancy compared to 23% in the Summer Term 2022
- 62% of providers have no concerns about their business sustainability compared to 35% in the summer term 2022

Nationally, the following steps have been taken by childcare providers to manage sustainability pressures (*Coram & Family Childcare Survey 2023*):

- Reduced number of childcare staff (reported by 48% of LAs)
- Reduced opening hours of settings (44% of LAs)
- Reduced number of funded early education entitlement places provided (43% of LAs)

Data supplied through the Provider Survey 2023 demonstrates an improvement in occupancy and growing confidence in business sustainability. We need to investigate why this is the case for some but not all childcare providers. We are aware that some city providers implemented the steps above after the pandemic when their occupancy was low in order to regrow their businesses. Are these the same providers with increasing occupancy and business confidence? Are there lessons learned that can be shared?

### **Early Years Staffing** *(sourced from the Childcare Sufficiency Assessment Provider Survey Summer Term 2023)*

- 18% of providers are struggling with staffing issues
- 10% of providers are having difficulties retaining staff
- 35% of providers are struggling to recruit suitably qualified and experienced staff
- 17% of providers are not operating at full capacity due to staffing vacancies

It has been widely reported that the early years sector staffing crisis continues to have a significant impact on the early years and childcare sector. More than half of Local Authorities have reported the struggle to recruit suitably qualified, experienced staff (*Coram & Family Childcare Survey 2023*). The sector are also struggling to retain staff who are leaving to pursue alternative careers with more work-life flexibility or higher salaries. When trying to recruit, providers are faced with no interest or applicants with little or no experience or insufficient qualifications.

The Department for Education has recognised and acknowledged the staffing crisis as a significant barrier to the delivery and expansion of childcare places and are currently developing plans to address this issue through a national campaign, which is due to launch January 2024.

## SECTION 4b: Current Economic Climate on Families

### **Cost of Living Crisis (Inflationary Pressures)**

Families and childcare providers alike are struggling amid rising energy bills, fuel costs and general cost of living increases. For families, rising costs are forcing parents to reconsider household budgets and re-prioritise essential and non-essential costs. Childcare may be a cost which is no longer affordable. For childcare businesses, they are experiencing the same pressures, with the addition of business rates increases and increased staffing costs.

According to the Office for National Statistics findings (Opinions and Lifestyle Survey):

- Around 6 in 10 (62%) adults reported that their cost of living had increased, compared with a month ago; this proportion appears to have gradually decreased since early April 2023, when it was at 76%
- Commonly reported reasons why adults said their cost of living had increased compared with a month ago were an increase in the price of food shopping (96%), an increase in gas or electricity bills (62%), an increase in the price of fuel (34%), or an increase in their rent or mortgage costs (26%)

The Coram Family and Childcare Survey 2023 reported:

- The average price of a part time childcare place (25 hours) a week for a child aged under two in a nursery is £148.63 across Great Britain, or £7,134 a year.
- England has seen the sharpest rise in prices across all age groups – an average of 5.4% increase across all age groups. For under twos this is double the percentage point rise seen last year and for two year olds, over three times the percentage point rise seen last year.

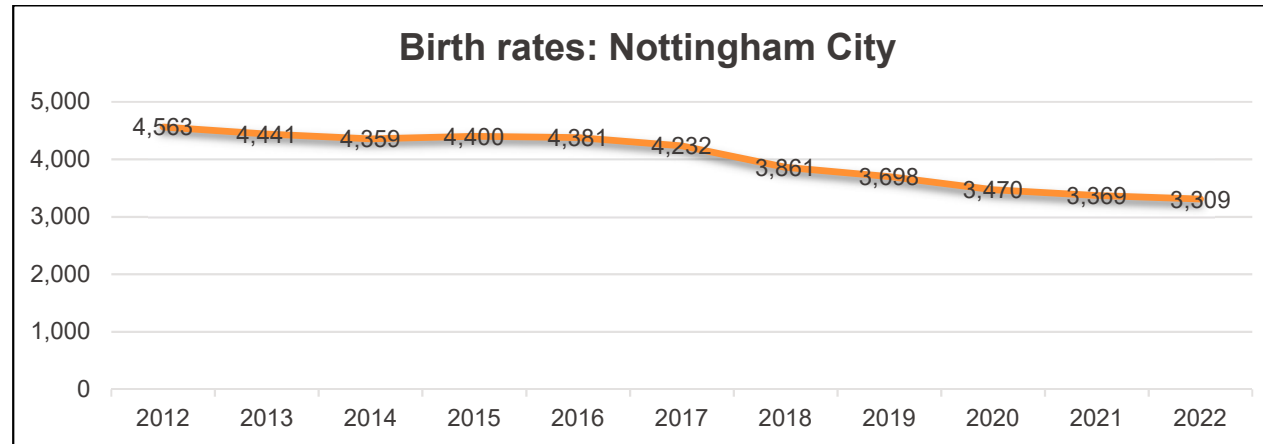
Analysis from the Social Market Foundation found that childcare accounts for 7% of household income among those paying for it, rising to 17% for those in the bottom income quintile.

### **Changes to Family Working Patterns**

Increasingly more parents have access to flexible working arrangements including working from home. This has enabled parents to adapt their working hours in order to enable them to manage their own childcare arrangements. Some businesses have, or are planning to, support their employees to work from home, which may have a sustained detrimental impact on all childcare provision, particularly that in the out of school sector.

## SECTION 4b: Demographic Information

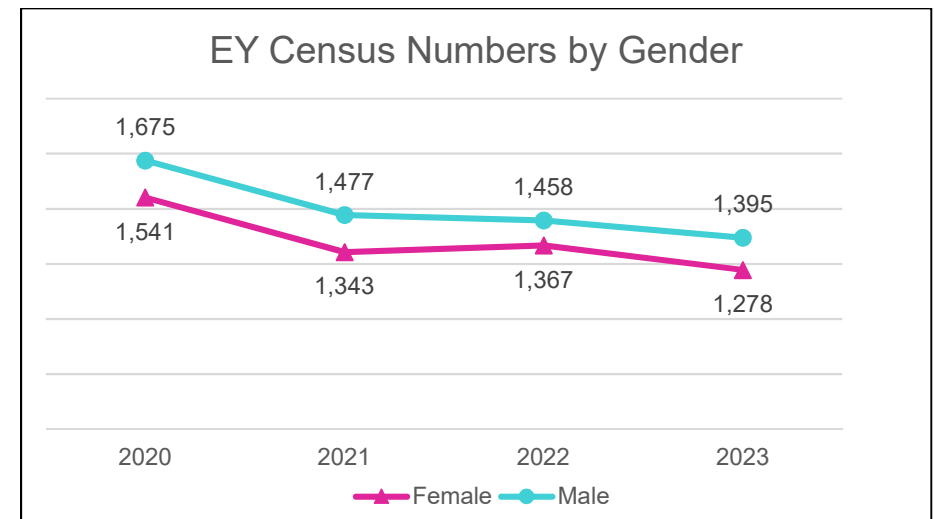
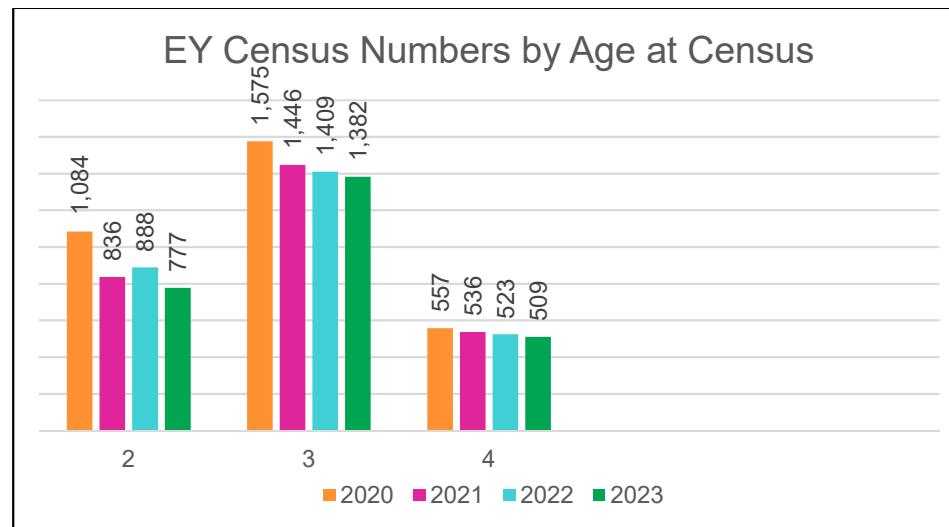
### Birth Rate (Public Health England)



#### Falling birth rate

The number of births in Nottingham has been reducing year on year for a few years, as is the case nationally. However the decline seems to be slowing.

It is possible that the birth rates could rise again, or that outward migration could fall, which would lead to a higher demand for childcare places. It is therefore crucial that demographic trends continue to be closely monitored.

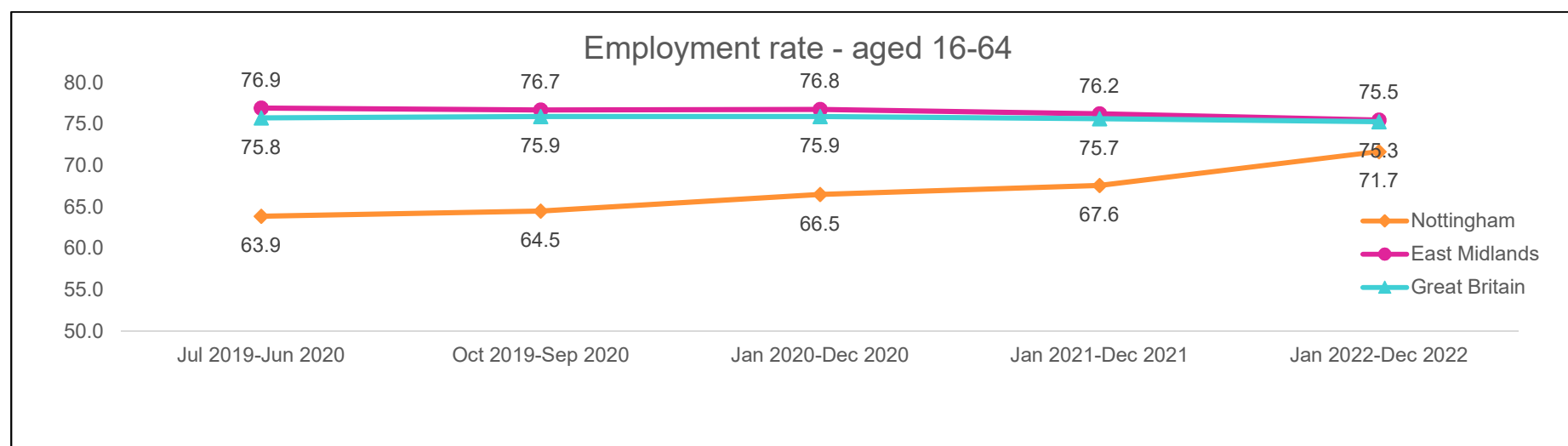


## Local Housing Development

(Sourced from: <https://www.nottinghamcity.gov.uk/information-for-business/planning-and-building-control/building-a-better-nottingham/housing-developments/>)

AREA	LOCATION	DETAIL
Bestwood	Beckhampton Road	129 new council homes, started 2022
Bestwood Village	Garvey Glade	300 homes, under construction
Beeston	Beeston Quarter	300 new houses, 2,3 and 4 beds
Meadows	Arkwright Walk	Various sites
Meadows	former Clifton Miners' Welfare Club site	20 homes
Basford	Tunstall Drive	17 new homes (five two-bed houses and 12 one-bed apartments) (NCH)
Top Valley	Knights Close	20 family homes
Bulwell	Aldgate Close	13 two, three and four-bed family homes

## Employment Rates (ONS Crown Copyright Reserved [from Nomis on 28 July 2023])



## **SECTION 4c: Employers and Employment** *(sourced from the Childcare Sufficiency Assessment Employers Survey Spring/Summer 2023)*

Intelligence from local employers and employment is pertinent to full Childcare Sufficiency Assessments to enable the triangulation of demand from parents, supply from providers and the business need of employers which can influence both.

Productive, engaged employees, who know that their family commitments are understood and supported by their employer, contribute massively to the thriving businesses our economy needs. However, employers can face the difficult task of balancing the needs of their staff with the requirements of the business and this is where the local childcare infrastructure has a significant part to play. Decisions about how many hours to work, or indeed whether to work or not, can be dependent on the availability of local childcare provision.

The Childcare Sufficiency Assessment Employers Survey formed part of this full Assessment and aimed to ascertain key information around how employers support the childcare needs of their employees, if their employees had difficulty working due to lack of childcare, the impact they anticipated the new and expanded early years entitlements may have on the childcare needs of their workforce and their awareness of services such as the Families Information Service and Ask Lion.

The Survey was live for 4 weeks and was shared via the platforms and local leads for Twitter, D2N2 Growth Hub Newsletter, Growing Nottingham, Marketing Nottingham, Nottingham Partners, Creative Quarter and Business Improvement District. Despite the reach and engagement of wider partners being considerably more than the single email database used in the last full Childcare Sufficiency Assessment in Autumn 2020 which achieved a 24% response rate, disappointingly this latest Survey did not generate one single response and as such, this element of the triangulation of data, and value it can bring, is sadly missing from this report.

The 2020 Assessment's key finding was around employer's reporting that 36% of employees had found it difficult to work due to lack of childcare provision, but this was at the time the childcare sector was just starting to re-open and begin recovery from the global pandemic of COVID-19. Three years on, with childcare providers now fully open again, and no sufficiency concerns highlighted through bi-annual Childcare Sufficiency Assessment Scorecards, this is not expected to have remained a concern that presented as part of this latest Assessment and the assumption could be made that the lack of response is due to employers not having major concerns with the childcare needs of their workforce, indeed ONS Research from 2022 stated that 84% of workers who worked from home during COVID planned to continue with hybrid working in the future. A shift in the childcare needs of local workforces may become more prevalent to employers as the new and expanded early years entitlements begin to come into force from April 2024.

We are confident that the latest Survey developed, via MS Forms, was the right format, simple to use and quick to complete so for future Assessments we will undertake closer collaboration with the partners above on how best to engage local employers, as we believe they are the best route for reaching this specific audience, but will also give consideration to reinstating the direct email approach and lengthen the Survey time to encourage a higher response.

## SECTION 4d: Expansion of the Early Years Entitlements

In the Spring Budget 2023 the Chancellor announced a revolution – 30 hours childcare for every child over the age of 9 months with working parents by September 2025. The government are focused on giving children the best start in life and supporting parents to access affordable, high quality childcare and this expansion of funded childcare is the largest ever and will remove barriers to work for nearly half a million parents with a child under 3 in England.

To enable childcare providers to prepare to deliver such a major expansion, it will be rolled out in phases to ensure there are enough places and staff ready to meet increased demand, and the funding paid to childcare providers to deliver these offers will be increased. The expansion delivery phases are;

- April 2024 – working parents of 2 year olds able to access 15 hours childcare support
- September 2024 – 15 hours childcare support extended to working parents of children from the age of 9 months to 3 year olds
- September 2025 - working parents of children under the age of 5 entitled to 30 hours of childcare per week

In addition, the government also announced:

- This childcare transformation will expand 30 hours childcare support for working parents with children over the age of nine months, saving up to £6,500 a year for parents for just a single child. This is on top of the upfront childcare support for parents receiving Universal Credit and the support that is available through Tax-Free Childcare.
- It is working to deliver an ambition for all parents of primary school aged children to access childcare in their local area between 8am and 6pm, tackling the barriers to working caused by limited availability of wraparound childcare.
- Childcare costs of parents moving into work or increasing their hours on Universal Credit paid upfront rather than in arrears, with maximum claim boosted to £951 for one child and £1,630 for two children – an increase of around 50%.
- In recognition of the importance of childminders, a start-up grant of £600 for childminders registered with Ofsted and £1,200 for those registered with a childminder agency will be launched to help with the costs incurred when registering

This revolution in childcare will undoubtedly change both the supply of, and demand for, early years provision in the City, making the Childcare Sufficiency Assessment even more critical as we plan and monitor for these changes.

Timely, accurate information and support both to providers, internal and external colleagues, wider partners and parents are all essential in ensuring effective delivery of this agenda in Nottingham City. The Early Years Team will be maintaining our website with updates, social media accounts, direct correspondence and briefing sessions as part of our Communication Strategy for the delivery of this extended offer to ensure no family misses out on the provision they are entitled to.

## SECTION 5: Childcare Sufficiency and Next Steps

### What is the data telling us?

Having collected, collated and analysed data from parents, providers, participation and demographics; we now have an indication of, and can report on, whether Nottingham City has sufficient childcare provision.

The data within this report will enable us to look at sufficiency:

- On a city wide basis
- On a ward basis
- By age of child
- By type of childcare service
- By childcare provider type

**Page 31**      **Childcare Sufficiency in Nottingham City**

**Page 32**      **Early Years Funded Provision – Recovery to Pre-Pandemic Levels**

**Page 33**      **National Context**



## SECTION 5a: Childcare Sufficiency in Nottingham City

There needs to be an element of caution taken with the data presented in this report. Measuring sufficiency is complex, particularly as the full extent of the impact of the pandemic and the current cost of living crisis emerges. We therefore need to consider what the data in sections 1 and 2 is telling us alongside parents' feedback in section 3 and other influential factors reported in section 4.

Once again there has been a drop in the number of childcare providers however, this remains below the national average. Despite current business pressures, new childcare provision continues to open including childminders and full day care. It is essential that we continue to support and monitor the sustainability of our existing childcare provision and encourage and support new ventures where they are needed the most. The LA Early Years Team continue to monitor the childcare market through the Childcare Sufficiency Assessment (CSA), subsequent CSA action planning and regular termly contact with providers. A tailored package of support, determined by the Provider Support Framework, is offered by a team of EYFS Support Workers. Information and guidance is also offered through the Early Years website.

The current childcare place vacancy rate remains high. There are vacancies reported across each age range within every ward in the City. However, we can see by the participation data (2, 3 and 4 year old entitlements) on pages 15 and 16 that there are families entitled to a funded place who are yet to take up their entitlement. We are also mindful that with the [early years entitlement expansion](#) (page 29), more children will be eligible for a funded childcare place. Marketing for the expansion of funded provision has started via the Department for Education. We can see through a significant increase in contacts/enquiries to the Families Information Service in July 2023 that the national campaign may be reaching families and raising parental awareness. We wait with anticipation to see if this awareness raising translates to actual participation in future terms.

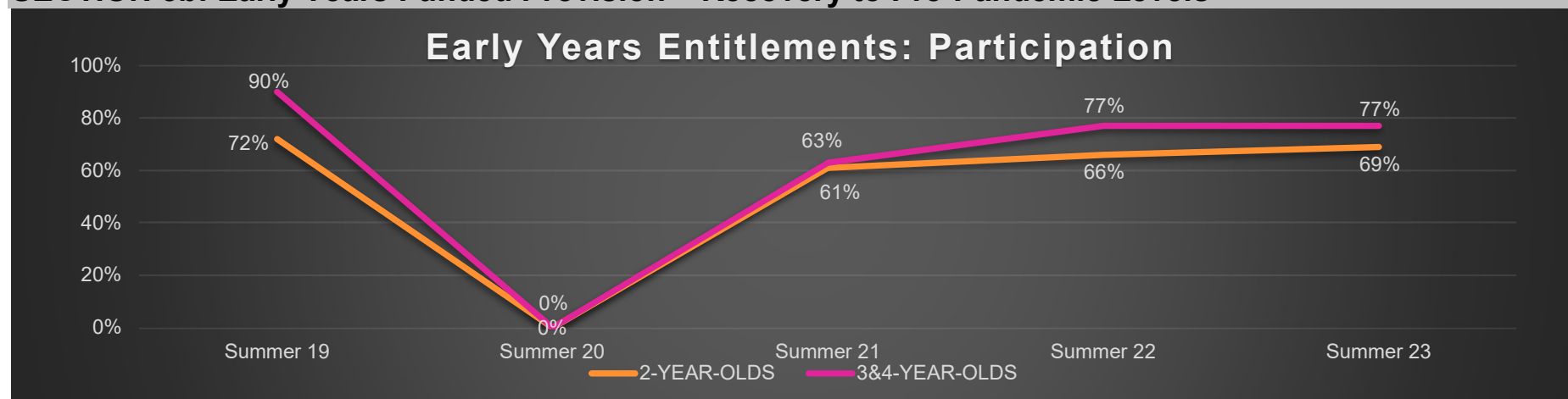
Through our Parent Survey 2023, we can see in section 3 that cost is a significant barrier to parents accessing childcare services. In addition to the expansion of funded provision mentioned above, the government has been actively encouraging the take-up of Tax Free Childcare available to families to support with childcare costs. The LA has actively supported this through partnership engagement and information shared via the Families Information Service (FIS) and [ASKLiON](#). FIS is a LA parent-facing service which provides advice to families on services for children in Nottingham, including childcare and the funded entitlements. This function is carried out through a dedicated free-phone telephone line, and online through [ASKLiON](#). It is essential we maintain and promote the Council's information for families to ensure awareness and accessibility to information in the right place at the right time.

Data within this report is captured and scrutinised on a citywide and ward level. Ward level data enables us to see where 'pressure points' exist with regards to the availability of childcare places and participation. The following wards require additional scrutiny:

- DALES: has one of the lowest participation rates for both the 2 year old and Universal 3 and 4 year old entitlements
- SHERWOOD and LENTON/WOLLATON EAST: high occupancy of 2, 3 and 4 year old provision and both breakfast and after school provision

A CSA Action Plan will be developed to address the points above and other identified pressures.

## SECTION 5b: Early Years Funded Provision – Recovery to Pre-Pandemic Levels



### Context:

- Summer 2019 – pre-pandemic ‘take-up’. Summer Terms 2020 – no available data, but national restrictions with limited provision.
- Summer 2023 – 69% uptake of 2 Year Old places against a local KPI of 75% and 77% uptake of Universal 3&4 Year Old places against a local KPI of 80%.

### Next Steps:

- Identify lowest performing wards
- Engage key services (Family Hub, Family Mentors, Parent Champions, FIS, Social Care, CityCare, SSBC, schools, childcare providers, DWP and more)
- Influence targeted parental engagement approach

### What can we do collectively to promote the funded entitlements?

Spread the word through social media. Articles and suggested text can be obtained by emailing:

[catherine.smith@nottinghamcity.gov.uk](mailto:catherine.smith@nottinghamcity.gov.uk)

Ensure appropriate venues are stocked with leaflets and displaying the funded entitlements poster. For additional copies, contact the Families Information Service:  
**0800 458 4114**

Signpost families to the Families Information Service for information on the funded entitlements and childcare providers across the City:  
**0800 458 4114**

Signpost families to ASKLION for information:

[www.asklion.co.uk](http://www.asklion.co.uk)

## SECTION 5c: National Context (sourced from Coram Family and Childcare, Childcare Survey 2023)

### General Points

- LA's reported that key factors decreasing sustainability of childcare included:
- Problems with recruiting and retaining staff (69% of LAs)
- Cost of staff (65% of LAs)
- Cost of energy (57% of LAs)
- Funding rate of early education entitlement (56% of LAs)
- Cost of food (53% of LAs)

### Sufficiency Points

- Big drop in sufficiency this year in England where childcare shortages mean the children who stand to gain the most from childcare risk missing out
- Less than 18% of LA's in England have enough childcare for disabled children
- 19% of LA's stated that more than 25% of childminders in their area are at risk of leaving the profession
- 18% of LA's stated that 25% or more of group-based providers are at financial risk
- Fall in sufficiency of early education entitlements in England is concerning as these were introduced to boost children's outcomes, getting them ready to learn at school and beyond. There is strong evidence that high quality early education can narrow the achievement gap between disadvantaged children and their peers that exist before they start school. Following a pandemic which saw this existing gap widen further, this is all the more important.

**A CSA Action Plan will be developed to address the recommended actions identified in this Assessment to ensure the LA continues to meet its statutory duty for securing sufficient childcare within Nottingham City.**

**For further information please contact:**

Catherine Smith

Early Years Programmes Manager

 0115 876 4548

 [catherine.smith@nottinghamcity.gov.uk](mailto:catherine.smith@nottinghamcity.gov.uk)

Nottingham City Council, Loxley House,  
Station Street, Nottingham, NG2 3NG