



London Borough of Waltham Forest

Childcare Sufficiency Assessment (CSA)

Summer 2023

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1.0 Executive Summary

1.1 Executive Summary

The Local Authority has a statutory duty to secure sufficient childcare, so far as is reasonably practicable, for working parents/carers, or parents/carers who are studying or training for employment, for children aged 0-14 or up to 18 for disabled children.

Sufficient free early education and childcare provision also needs to be made for parents/carers of eligible 2, 3 and 4-year-old children. In England, some disadvantaged and vulnerable¹ two-year-olds (in Waltham Forest this equates to approx. 1000 children) and all three- and four-year-olds are entitled to 570 hours of free early education and childcare per year. In Waltham Forest we refer to this as the Free Early Education Entitlement (FEEE). The universal entitlement is usually offered as 15 hours per week for 38 weeks (known as a term time place) or pro-rata for up to 52 weeks (known as a stretched place) per year. Some three- and four-year-olds from working families are eligible for 30 hours FEEE per week (known as a stretched place)². The working family entitlement is usually offered as 30 hours per week for 38 weeks (known as a term time place) or pro-rata for up to 52 weeks per year (known as a stretched place).

The government announced in the spring budget 2023 that in addition to the current free early education entitlements, a phased rollout of an expanded entitlement to free childcare for children from working families would commence. From April 2024 2 year olds will be entitled to up to 15 hrs of free childcare per week, from September 2024 this will be extended down to children from the age of nine months old and from September 2025, children aged nine months and upwards will be entitled to 30 hours free childcare per week until they are of statutory school age.

The period between March 2020 and August 2023 has proved very challenging for the early years and childcare sector due to COVID-19 national lockdowns, restrictive government guidance and adjusting to the new post COVID-19 normal. Despite these challenges, the schools and Ofsted registered childcare providers operating in Waltham Forest have continued to prove themselves to be resilient, dedicated and adaptable by continuing to provide safe early years education and childcare, caring for children in the setting and providing remote support for those that needed or chose to stay at home during lockdown.

It is still not clear what the long-term outlook is going to be for the sector and if there will be further changes in demand for and take up patterns of places. Even though we are now in the post COVID-19 phase, many settings continue to have issues with staff recruitment (staff having left the sector over the last two years and a decline in new suitably qualified practitioners joining the sector), the changing

¹ <https://www.walthamforest.gov.uk/families-young-people-and-children/childcare-and-early-years/free-early-education-two-year-olds>

² <https://www.walthamforest.gov.uk/families-young-people-and-children/childcare-and-early-years/free-early-education-three-and-four-year-olds>

childcare needs of parents/carers, and financial sustainability, most of which will be further exacerbated by the expansion of the free early education and childcare offer from April 2024.

It is becoming increasingly concerning that a number of providers have raised concerns about their ability to recruit staff, particularly qualified early years professionals. This can result in providers being unable to operate at full capacity and consistently offer the number of places they are registered with Ofsted to provide.

It is unlikely that the ongoing demand for free early education and childcare places will be fully understood until the full extension of the free early education entitlement has been introduced in September 2025 and has been delivered and embedded for a full academic year (by September 2026), as this is likely to be affected by many factors. These factors include birth rates, employment rates, working patterns (e.g. number of hours worked per week and ratio of home vs office-based working), patterns of take up of free early education and the levels of additional chargeable hours purchased by parents/carers, as well as any impact as a result of the current economic crisis. There is also a risk that financial pressures could cause some providers to close, which could potentially create shortages in some areas. Therefore, the early years sector will need to remain flexible and respond to future changes in demand.

Families that reside in the borough have a good choice of different types of high-quality provision. However, there are some wards where childcare provision is not currently available in the locality of residents' home addresses, in line with our ambition to create 15-minute neighborhoods.

1.1.1 Early years and childcare places for under 5's

Levels of provision fluctuate regularly but as at March 2023³ there were 290 Ofsted registered providers offering 6068 full time equivalent early years and childcare places, in addition there were 41 nursery classes and 3 maintained nursery schools offering 2474 places.

Overall, our latest CSA data identifies that overall there is a small surplus of 294 places across the Borough. These figures are based on expected demand for free childcare places as a result of the childcare expansion announcement by the government, the first phase of which commences in April 2024.

Whilst there are some wards with high numbers of deficit places, in some instances these are offset by a surplus of places in neighboring wards.

There is a large deficit across all areas for places for under 2's and surpluses in places for 2, 3 & 4 year olds across a number of wards. This would suggest that the mix of place availability is not in line with the demand for places, as this also aligns with what parents/carers told us in their survey responses. It would therefore appear that some of the place deficit could be addressed by schools and Ofsted registered providers working together across areas to consider amending their delivery models. This would assist in ensuring that the mix of delivery models in

³ Source: Survey carried out of settings by Waltham Forest Early Years Team

localities aligns with demand and enable providers to better meet the needs of families as well as maximise occupancy levels and financial sustainability.

At the time of this CSA being written we had secured the creation of approximately 200 additional places over the next 5 years. Work will continue as part of our place development work to continue to create more new places.

In January 2022, 97% of children taking up their FEEE place attend a Good or Outstanding Ofsted rated provider which is 2 percentage points above London and 4 percentage points above England.

In January 2022, 80% of 3 & 4 year-olds were taking up their universal FEEE place, which was 2 percentage points below London and 12 percentage points below England.

In January 2022, 21% of 3 & 4 year-olds were taking up their extended working family FEEE place, which was 3.6 percentage points above London and 5.5 percentage points below England

In January 2021 only 44% of 2-year-old children eligible for the offer for vulnerable and disadvantaged children were taking up their FEEE place. In light of this a strategy was developed and implemented to address this. As a result, take up had increased to 61% in January 22, which was 1 percentage point below London and 11 percentage points below England.

Overall, the quality of provision in Waltham Forest is good, with 94% of providers achieving a 'Good' or 'Outstanding' Ofsted inspection outcome as at 31st March 2023 which 2 percentage points below National.

Waltham Forest's Early Years Foundation Stage Profile (EYFSP) data 2022⁴ showed that children's levels of development in Waltham Forest at the end of the EYFS are higher than London and England across most measures.

In Jan 2022 there were a higher % of Pre-reception age children in Waltham Forest with learning & developmental delay/ Special Educational Needs or a Disability (SEND), being identified and supported to take up their FEEE place, without the need for an EHCP, than in London and England.

1.1.2 Breakfast, after school and Holiday club childcare (Out of School) provision for children on roll in a school

There were a low number of respondents to the parent/carer Out of School survey, so further work will need to be undertaken as part of a new CSA in the Summer 2024 in order to obtain more representative responses. Further work will also need to be completed to better understand the demand for free Out of School places required to deliver schemes such as the Governments Holiday Activity and Food (HAF) programme, how many additional places are required for working families who do not meet the criteria for the HAF scheme and require additional childcare hours (HAF schemes only run for 4 hours per day and do not run during all the

⁴ <https://data.london.gov.uk/dataset/early-years-foundation-stage-profile-assessment-results>

weeks of the school holidays) and those that do not meet the criteria for the scheme and would therefore be paying for their childcare provision.

There are sufficient breakfast club places in all but 5 wards with a surplus of 544 places across the Borough.

There is an overall deficit of 536 after school places across the Borough with a deficit in 15 of the 22 wards, as demand for these places are 18% higher than for breakfast school places.

There is an overall deficit of 721 holiday scheme places across the Borough with a deficit across 17 of the 22 wards in the Borough, as demand for these places are 14% higher than for breakfast school places.

1.2 Factors affecting the availability of provision

1.2.1 Early years and childcare places for under 5's

Families that reside in the borough have a good choice of different types of high quality provision. Table 4 at 4.2.2 shows a breakdown at ward level of the proportion of places by each provider type, compared to the population of 0-4 year olds in each ward. Only 1 of the 22 wards within our borough, (Endlebury) does not have a full daycare provider located within the ward. Similarly, there are 5 wards without a PVI term-time preschool provider. However, a higher than average level of school based nursery in three of these ward offsets the lack of pre-school, with Cathall being the only exception.

Childcare places are not always available in the type of provision or in a delivery model that parents/carers require. This results in over supply in some types of provision and significant deficits in others e.g. for children under 2 years of age.

Finding enough free early education provision for vulnerable and disadvantaged two-year-olds and increasing take up of these places has been challenging due to difficulties in securing suitable premises and funding rates received from the Government to deliver them, in many instances, not being sufficient to cover the cost of delivering a place. The Government have increased funding rates to provider from September 2023 from £6 to approx. £8 per hour, which should assist with financial sustainability and more providers being willing to offer these places. It remains a high priority for us to work collaboratively across Council departments to secure these places.

As the demand for full daycare places for 2-year olds from working families is high, this has an impact on the availability of places in full daycare settings for FEEE places for 2-year-olds who are eligible for a place under the vulnerable and disadvantaged criteria who only want to take up just their free entitlement. As a result, the majority of places for these 2-year old's need to be provided by PVI sector term-time providers and school nursery classes. However, the availability of places in this sector is not sufficient to meet demand in a number of wards.

Where some families have older siblings attending school, they would prefer to take up their child's 2-year-old FEEE place at the same school. However, there are not

enough 2-year-old FEEE places currently being delivered in schools to meet all families' preferences.

More families that take up full daycare places are likely to travel outside of the ward in which they reside to access their place. Those who only take up their part-time FEEE place generally prefer provision to be in the locality of their home address.

There are 10 wards where the percentage of childminder provision is below the Borough average of 6% of places available vs the total 0-4 year old population. 5 wards in the Walthamstow area of the Borough and 5 in the Leyton & Leytonstone area of the Borough.

We are aware that there are an increasing number of Nannies operating in the Borough, but as Nannies do not have to register with Ofsted, we do not have an accurate record of the numbers operating in the borough, or the numbers and ages of the children that they care for. Therefore, they have not been included in this CSA summary, which is likely to have slightly inflated the number of deficit places, particularly for under 2's.

There are certain wards that evidence a large surplus of places. This is generally where there are major tube or mainline stations (e.g. Chingford Green, Highams Park, Wood Street & Leytonstone), as some families, particularly working families requiring full day-care, will choose to take up childcare in the vicinity of their departure train/tube or bus station rather than the ward of their residence.

1.2.2 Breakfast, after school and Holiday club childcare (Out of School) provision for children on roll in a school

Childcare providers, and particularly PVI sector provides whose sole business is the provision of out of school provision, can find it difficult to recruit staff to work for a few hours in the morning followed by a few hours in the evening during term-time and holiday periods.

Premises that are big enough and suitable for delivering holiday schemes can be difficult to source due to the numbers of places that need to be delivered and ideally having an outdoor area. Schools can have ideal spaces for delivery of these schemes either by the school delivering places themselves or by renting space to a PVI provider, but access to these premises can sometimes be difficult during holiday periods as these are often the periods when building and maintenance works need to be carried out.

More families that take up holiday scheme childcare provision are likely to travel outside of the ward in which they reside, and in some cases out of Borough to access their place. Those who only take up their part-time FEEE place generally prefer provision to be in the locality of their home address.

1.2.3 Factors affecting all types of childcare provision

The lower levels of take up of free early education and childcare places are strongly associated with perceptions about its quality, with some of the existing vacancies in early years settings being viewed as of lower quality. Some of these perceptions are linked to the suitability of the premises that the childcare is offered from,

although the quality of the early education and care is good. Whilst we have procedures in place which require providers who wish to be commissioned by the LA to deliver FEEE places to evidence they are meeting key statutory requirements regarding compliance with health and safety requirements around areas such as gas, electricity, fire, water and asbestos, further measures to address the quality of the environment as well as parental perceptions about quality would address some of the supply issues for under-fives childcare.

Historically, the provision of early education and childcare places has not been embedded in the Council's regeneration and planning strategies. This has now been addressed. However, as new building developments can take several years from inception to completion, it is likely to be a few years until we see significant benefit from this.

Childcare providers continue to raise concerns about their ability to recruit staff, particularly qualified early years professionals. This can result in a provider being unable to consistently offer the number of places they are registered to provide. The recruitment situation is particularly challenging for the PVI sector as they are unable, in a number of instances, to compete with the pay terms and conditions offered for similar positions within schools.

1.3 Actions to address sufficiency issues

To ensure overall childcare sufficiency and increase take up of FEEE places, we will continue to:

1. Work collaboratively across the Council to deliver our **commitment to ensure there are sufficient early years and childcare premises.**

This is set out in the following documents:

- i. Waltham Forest Local Plan (LP1)
 - ii. Infrastructure Delivery Plan (IDP)
 - iii. Strategic Asset Management Plan
 - iv. Capital Strategy
 - v. Planning Obligations Supplementary Planning Document
2. Ensure that early years and childcare premises are **considered as part of every housing and regeneration project**, as well as every primary school expansion.
 3. Ensure that all Council **owned property** that becomes available at the end of a lease term, is vacant or is identified for disposal, is **considered as a site** for early years and childcare.
 4. Ensure that early years and childcare service work with **Commercial Estate & Investment** service to **explore options to create new early years provisions** as part of any redevelopment feasibilities and/or proposals
 5. **Embed clear processes** within **Planning & Regeneration** to ensure that the Early Years and Childcare service is **consulted regarding all existing and future developments**, in order to identify potential opportunities to create new purpose built nursery provision or potential expansion of our existing provision in areas of need.

6. Ensure that **new build childcare provision is based on a 50+ place nursery** provision with access to outdoor provision, to ensure quality and financial sustainability.
7. Create new purpose built nursery provision by **working in partnership with any organisations that want to purchase or build new nursery provision** in wards where there are high levels of deficit places.
8. Ensure that new early years and childcare **provision is considered as part of any new regeneration or housing project** by way of new build nurseries, or appropriate **section 106 or Community Infrastructure Levy (CIL) contributions** are sought to support the funding of construction of new premises or adaption or expansion of existing premises.
9. Develop and deliver an early years **recruitment campaign** to encourage more childminders and nannies to register with Ofsted and provide FEEE places for under 2's.
10. Ensure appropriate training and employment opportunities are available and encourage individuals to take them up as part of a recruitment campaign run by our **Adult Learning and Skills Service who will promote early years as a profession.**
11. Explore ways in which we can ensure that there is a **'bank' of early years professionals** which would include staff with SEND experience that schools and Ofsted registered providers can recruit from to cover vacancies, increase capacity and deliver out of school provision.
12. Ensure that the provision of **specialist SEND places** for early years children is included in **SEND place planning strategy.**
13. Encourage **school nursery classes and term-time Ofsted registered providers to consider providing FEEE places for 2-year-olds** in areas where there is a deficit of places.
14. Review our **revenue place creation grant** in order to support the cost of creating new places by working partnership with existing DfE registered schools and Ofsted registered providers to encourage them to expand their provision in areas where there is a deficit in places for vulnerable and disadvantaged 2YOs.
15. Work with **schools to explore opportunities to lease/rent space within their school** site to an external PVI sector provider to deliver places to address a place deficit.
16. Work with providers of 3 & 4 year-old places in areas where there is a surplus of places, to suggest that they consider **revising their business model** to deliver full day-care for under 3's or FEEE places for 2-year-olds where there is a deficit.

17. Continue to work with colleagues across Family Hubs, Children's Social Care, Early Help, Health, Housing, Adult Learning and Employment services and the private, voluntary, community and faith sector to ensure **that all families are aware of their entitlement to a FEEE place** and the benefits to their family of taking up a place and are encouraged and supported to take it up and ensure that take up is in line with the demographics of the population of the Borough.
18. Review our **Early Years and Childcare Communication and Marketing Strategy** in order to ensure that parents/carers are aware of the free early education and childcare offer (including wraparound care for children up to 14, or 18 with SEND), supported to take it up and aware of the benefits to their family of taking up a place.
19. Continue to work with the **Government to request fairer funding rates** for the provision of FEEE places which cover the actual cost of delivering a place, in order to **support the recruitment and retention of staff** and encourage more providers to offer them.
20. Further work will be completed to better understand the supply and demand for **Out of School places** for vulnerable and disadvantaged families and working families.
21. Continue to work with providers to offer **sustainable yet affordable childcare**.
22. Review **information, advice and training** offer across early years foundation stage, supporting disadvantaged and vulnerable children and safeguarding/child protection to ensure we maintain the quality of provision and practice.
23. Review **process for commissioning and monitoring of childcare providers contracts** to deliver FEEE places to ensure that high quality providers deliver these places.

2.0 Background

2.1 Local Authority Statutory Duties relating to secure free early education and childcare places

The Childcare Act (2006) requires Local Authorities in England to ensure sufficient childcare, where reasonably practicable, for working parents and those parents studying or training for employment. Sufficient childcare should be available for children aged 0-14 years old, and up to 18 years old for disabled children and children with additional needs.

The Act also requires Local Authorities to secure free early years and childcare provision for qualifying children as part of the Government's free early education & childcare offer.

These duties are set out in part A of the Early education and childcare statutory guidance for local authorities

2.2 Our Childcare Sufficiency Assessment (CSA) 2023

Local Authorities are also required 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. The production of this CSA allows us to meet this duty and aims to identify whether there is sufficient childcare to ensure parents/carers are able to access their child's free early education entitlement and/or work because childcare places are available, accessible and affordable and that they are delivered flexibly in a range of high-quality providers.

In line with this statutory duty, as part of this CSA, we have assessed information about the current and projected supply and demand of childcare for particular age ranges of children, affordability, accessibility and quality of provision. This work is undertaken by gathering data on the number of places available, take up of places and population.

It is unlikely that the ongoing demand for free early education and childcare places will be fully understood until the full extension of the free early education entitlement has been introduced in September 2025 and has been delivered and embedded for a full academic year (by September 2026) as this is likely to be affected by many factors. These factors include birth rates, employment rates, working patterns (e.g. number of hours worked per week and ratio of home vs office-based working), patterns of take up of free early education and the levels of additional chargeable hours purchased by parents/carers, as well as any impact as a result of the current economic crisis. There is also a risk that financial pressures could cause some providers to close, which could potentially create shortages in some areas. Therefore, this CSA has been based on a combination of DfE and LA based estimates and assumptions which were available at the time of writing. The methodology for completing the CSA is set out in Appendix A.

We use this information to plan our work to support the local childcare market and to target specific areas so that appropriate plans are put in place to ensure that supply matches demand as far as possible. This information is also used to respond to planning, regeneration and housing development enquiries in order to secure provider contributions for the development of new additional early years and childcare places

The information contained in this CSA relates to information relating to availability of places available during summer term 2022 (April 2022-July 2022), it is therefore a 'snapshot' of place availability that was correct at that time.

It is worth noting that there have been ward changes in Waltham Forest since the last CSA, and as such this CSA report takes into account the latest ward changes.

The place gap analysis for under 5's has been based on the estimated demand for places in September 2025 following the expansion on the current free early education entitlement criteria and uses Greater London Authority (GLA) population projections at ward level as of July 2022.

Early years childcare delivered by Ofsted registered private, voluntary and independent sector providers⁵, fluctuates regarding supply and demand, more so than a school. This has been exasperated post the COVID-19 pandemic.

It is important to note that as the number of Ofsted registered childcare providers increase and decrease on a regular basis due to settings opening and closing, and school nursery class and Ofsted registered childcare providers increasing and decreasing the numbers and types of places that they provide in response to demand, **any organisations or individuals who are considering opening new early years or childcare provision in the Borough should contact the Early Years, Childcare and Business Development Service as part of their initial business planning to obtain an accurate picture of sufficiency at the time of their proposed opening to inform their business planning.**

3.0 Key findings

3.1 Summary Gap Analysis at Ward Level for free early education and childcare places for under 5's

3.1.1 The table below provides a high-level summary of the numbers of surplus and deficit places for **free early education and childcare places for under 5's** across each age cohort and provision type across each ward in the borough.

Key to table	
Sufficient or a surplus of places	
Medium level Deficit of places	
Higher level of deficiency of places	

Table 1: CSA Gap Analysis

	A	B	C	D
WARD	Under 2's places gap	2 year old's places gap	3 & 4 year old's places gap	TOTAL PLACES GAP PER WARD
CHINGFORD				
Chingford Green	-6	13	63	70
Endlebury	-57	-47	-45	-148
Valley	-56	-8	-34	-98
Larkswood	28	43	113	185
Hatch Lane & Highams Park North	-10	-5	95	80
Hale End & Highams Park South	9	51	65	124
CHINGFORD SUB-TOTAL	-92	47	257	213

⁵ Full Daycare, Preschools, Independent Nursery Schools and Childminders

WALTHAMSTOW				
Higham Hill	-36	8	54	25
Chapel End	-37	66	125	153
Upper Walthamstow	-55	-29	-79	-164
William Morris	-47	-32	-13	-92
Wood Street	11	40	211	263
Hoe Street	-42	25	24	8
High Street	-76	-44	34	-86
St James	-39	1	47	9
Markhouse	-45	-33	64	-13
WALTHAMSTOW SUB-TOTAL	-365	2	466	103
LEYTON & LEYTONSTONE				
Lea Bridge	-123	69	-143	-197
Leyton	-18	64	114	160
Grove Green	-147	82	-158	-223
Forest	-38	68	96	126
Leytonstone	69	54	113	236
Cathall	-52	40	-85	-96
Cann Hall	-100	73	0	-28
LEYTON & LEYTONSTONE SUB-TOTAL	-410	450	-62	-22
Total	-866	499	662	294

Overall, our latest CSA data identifies that overall there is a small surplus of 294 places across the Borough.

Whilst there are some wards with high numbers of deficit places, in some instances these are offset by a surplus of places in neighboring wards.

There is a large deficit across all areas for places for under 2's and surpluses in places for 2, 3 & 4 year olds across a number of wards. This would suggest that the mix of place availability is not in line with the demand for places, as this also aligns with what parents/carers told us in their survey responses. It would therefore appear that some of the place deficit could be addressed by schools and Ofsted registered providers working together across areas to consider amending their delivery models. This would assist in ensuring that the mix of delivery models in localities aligns with demand and enable providers to better meet families needs as well as maximise occupancy levels and financial sustainability.

There are plans to create approximately **200** more additional places by way of redevelopment projects over the next 5 years, all of which have already been approved by planning and are currently under construction. (see 4.2.3 for full details)

4.0 Free Early Education Entitlement (FEEE) for 2,3-& 4-year-olds

4.1 Background

Sufficient free early education and childcare provision also needs to be made for parents/carers of eligible 2,3 and 4-year-old children.

In Waltham Forest we refer to the Government's free early education and childcare offer as the Free Early Education Entitlement (FEEE) and will be referred to as such throughout this document.

In England, some disadvantaged and vulnerable⁶two-year-olds (in Waltham Forest this equates to approx.1000 children) and all three- and four-year-olds are entitled to 570 hours of free early education and childcare per year. The universal FEEE is usually offered as 15 hours per week for 38 weeks (known as a term time place) or pro-rata for up to 52 weeks (known as a stretched place) per year. Some three and four year olds from working families are eligible for 30 hours FEEE per week ⁷. The working family FEEE is usually offered as 30 hours per week for 38 weeks (known as a term time place) or pro-rata for up to 52 weeks (known as a stretched place) per year.

Parents do not have to use all the hours of their funded entitlement in one place. With the agreement of their childcare providers, they may choose to split them between providers.

The government announced in its spring budget 2023 that in addition to the current free early education entitlements the entitlement would be expanded in phases between April 2024 and September 2025 as follows:

- Commencing from April 2024, a provision of 15 hours will be made available to eligible working parents of 2-year-olds.
- Effective from September 2024,15-hour entitlement will be extended to eligible working parents of children aged 9 months and older.
- Starting from September 2025, a substantial enhancement will be implemented, granting eligible working parents of children aged 9 months to primary school age access to 30 hours of childcare and early education.

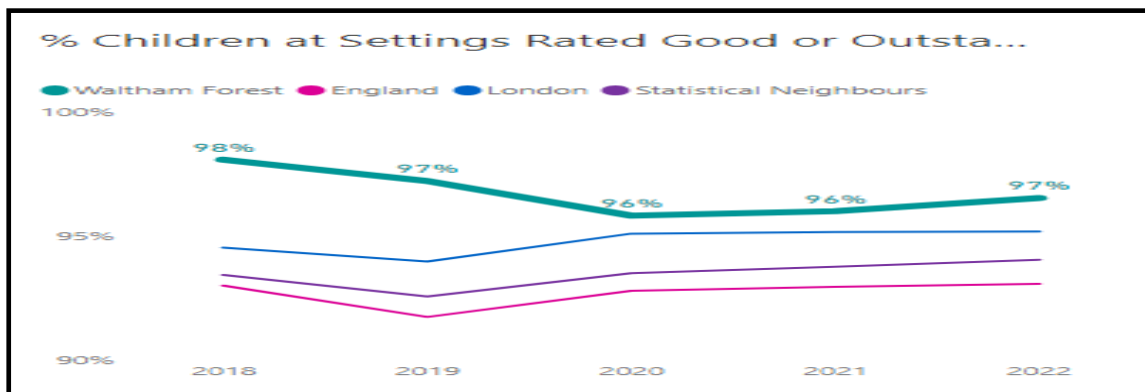
FEEE places, can only be provided by DfE registered schools and Ofsted registered provision, all of whom must deliver the full Early Years Foundation Stage (EYFS) curriculum.

DfE data regarding the take up of FEEE places in Waltham Forest at the Jan 2022 census showed that:

⁶ <https://www.walthamforest.gov.uk/families-young-people-and-children/childcare-and-early-years/free-early-education-two-year-olds>

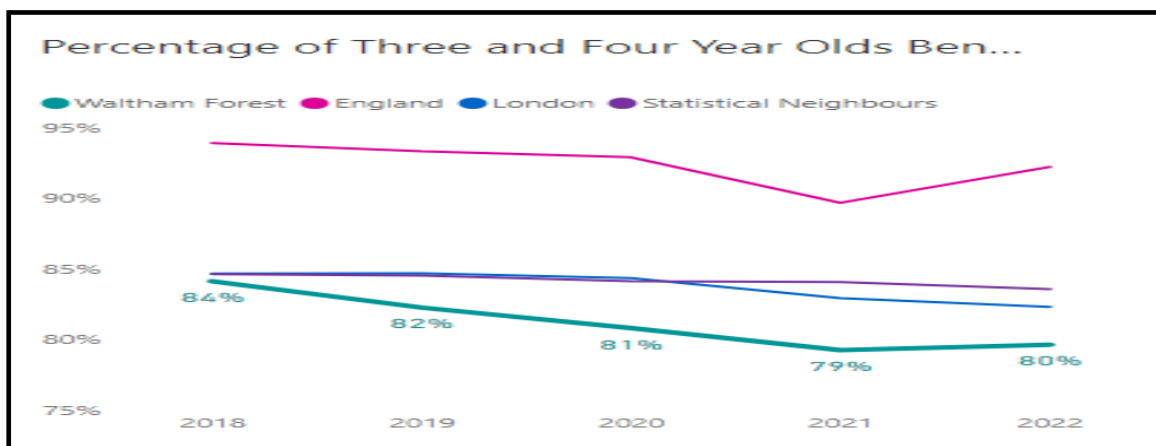
⁷ <https://www.walthamforest.gov.uk/families-young-people-and-children/childcare-and-early-years/free-early-education-three-and-four-year-olds>

Fig 1: % Children at settings rated Good or Outstanding



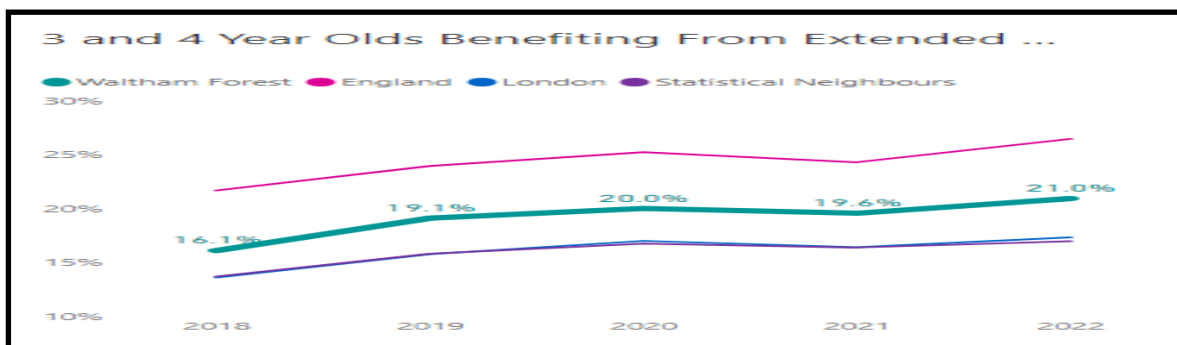
In Jan 2022 97% of children taking up their FEEE place attend a Good or Outstanding Ofsted rated provider which is 2 percentage points above London and 4 percentage points above England as shown in Fig 1.

Fig 2: Take up of 3- & 4-year-old universal FEEE places



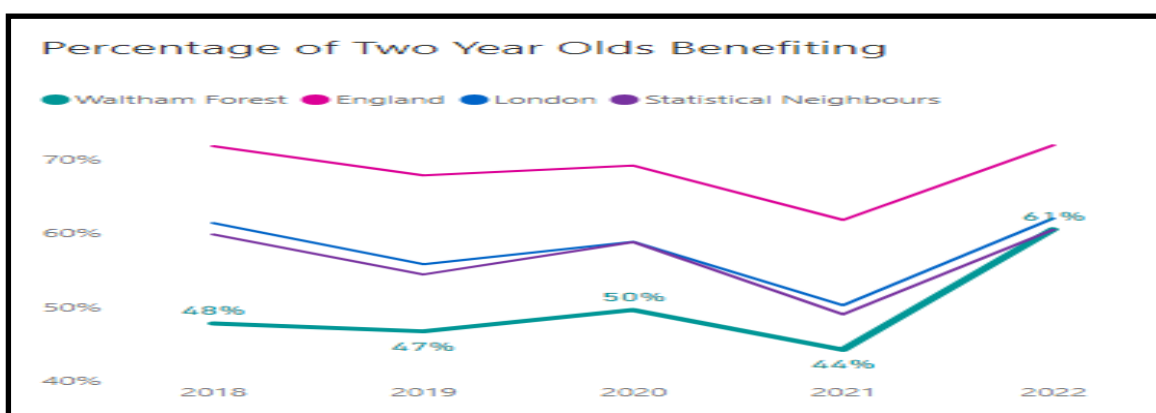
In Figure 2 above, in Jan 2022 80% of 3 & 4 year-olds were taking up their universal FEEE place, which was 2 percentage points below London and 12 percentage points below England.

Fig 3: Take up of 3- & 4-year-old extended FEEE places for working families



In Jan 2022 21% of 3 & 4 year-olds were taking up their extended working family FEEE place, which was 3.6 percentage points above London and 5.5 percentage points below England as shown in Fig 3.

Fig 4: Take up of FEEE places by 2-year-olds



In January 2021 only 44% of 2-year-old children eligible for the offer for vulnerable and disadvantaged children were taking up their free early education entitlement. In light of this a strategy was developed and implemented to address this. As a result take up had increased to 61% in Jan 2022, which was 1 percentage point below London and 11 percentage points below England as shown in Fig 4.

4.2 Supply and accessibility of childcare

4.2.1 Provider types

FEEE and childcare places in Waltham Forest are available through a diverse and regularly shifting market of DfE registered schools and Ofsted registered private, voluntary and independent sector providers.

Ofsted registered childminders are self-employed childcare professionals. They provide play, care and learning for children in the childminder's own home and offer a range of full day-care, term-time, before school, afterschool and school holiday provision. Childminders must be registered directly with Ofsted or with an Ofsted registered Childminding Agency if they look after children up to eight years old for more than two hours a day, in their own home for pay or reward.

Ofsted registered childcare on domestic premises is the term for four or more childminders working together to care for children on domestic premises.

Ofsted registered full daycare nurseries provide play, care and learning for children aged up to five. Typically, they open from 8am to 6pm, but some are open longer hours to suit working parents and offer a choice of full or part-time places. Day nurseries are generally operating over 48-52 weeks per annum.

Ofsted registered pre-schools provide play, care and learning normally for children aged between two and five years old and they usually open during term time only. The majority offer sessions in the mornings and / or afternoons. Some allow children to for up to 7 hours per day to align with a school day.

DfE school nursery provision provide play, care and learning normally for children aged between two and five years old and they usually open during term time only. The majority offer sessions in the mornings and / or afternoons. An increasing number of schools are extending their provision to allow children to attend for between 7 and 10 hours per day to support working families. Attending a school nursery class does not entitle a child to a reception place at the school. This is a separate application process in line with school admission processes.

The majority of childcare places for under 2's are provided by full day care providers and childminders. Parent/carers can claim their free early education entitlement at these settings and are generally also offered the option to pay for additional hours outside of their free entitlement.

Childcare before or after the school day and during school holidays. This can be delivered by a range of different providers, including breakfast and after-school clubs and holiday sports or play schemes. They could be linked to a child's school or based in the community.

Where parents/cares are paying for childcare in any Ofsted registered setting, some can claim Tax Free Childcare, the Childcare element of Working Tax Credit, Childcare vouchers, or Universal Credit which for eligible families could allow them to claim back up to 85% of their childcare costs up to a monthly limit of £646 for one child or £1,108 for two or more children.

4.2.2 Number of early years providers and places

Levels of provision fluctuate regularly but as at on 31st March 2023⁸ there were 290 Ofsted registered providers offering 6068 full time equivalent early years and childcare places, in addition there were 41 nursery classes and 3 maintained nursery schools offering 2474 places.

Table 2: Number of Places vs Number of Providers

Type of provision	Number of providers	Number of registered places
Childcare on Domestic and Non-Domestic	74	4208
Childminders*	170	939

⁸ Source: Survey carried out of settings by Waltham Forest Early Years Team

Out of School Childcare	46	921
Nursery classes in schools ⁹	41	2216
Maintained nursery schools ¹⁰	3	258

* Some childminder places may also be available for older children

As set out in the table below, the number of Ofsted registered early years places provided by Childminders have seen a year-on-year decline since 2018, however the number of early years places provided by full daycare and preschools (Childcare on Non-Domestic Premises) has seen a year-on-year increase. Overall, there has been a small net decrease of 111 places between March 2022 and March 2023 as shown in the table below, which was mainly due to the closure of one large provider.

Table 3: Number of registered places between March 2018 – March 2023

	Mar-18	Mar-19	Mar-20	Mar-21	Mar-22	Mar-23
Childcare on Non Domestic	5283	5291	5660	5639	5835	5791
Childminder	1212	1262	1167	1158	1032	965
Total	6495	6553	6827	6797	6867	6756

The number of registered places represents the maximum number of children who can be on the premises at any given time. In practice, some providers choose to operate at their maximum or reduced capacity in response to demand and availability of staff.

Waltham Forest has a good mix of childcare options. The number of places available by provision type is set out in the table below:

⁹ As recorded in Feb 2023 schools forum report

¹⁰ As recorded in Feb 2023 schools forum report

Key to table

No of places as a % of 0-4 population lower than the Borough average

Table 4: Total places available as a proportion of the 0-4 year old population

WARD	School nursery class places	No of places as % of 0-4 population	PVI Term-time Preschool provision	No of places as % of 0-4 population	Full Daycare provision	No of places as % of 0-4 population	Childminder provision	No of places as % of 0-4 population	TOTAL NUMBER OF PLACES	TOTAL POPULATION 0-4	No of places as % of 0-4 population
CHINGFORD											
Chingford Green	32	5%	54	9%	151	24%	62	10%	299	619	48%
Endlebury	33	7%	35	7%	0	0%	30	6%	98	497	20%
Valley	58	7%	30	3%	136	15%	64	7%	288	883	33%
Larkswood	96	10%	67	7%	265	28%	77	8%	505	934	54%
Hatch Lane & Highams Park North	98	12%	0	0%	212	26%	75	9%	385	807	48%
Hale End & Highams Park South	95	16%	29	5%	138	24%	61	10%	323	583	55%
CHINGFORD SUB-TOTAL	412	10%	215	5%	902	21%	369	9%	1,898	4,323	44%
WALTHAMSTOW											
Higham Hill	53	5%	72	7%	245	22%	79	7%	449	1093	41%
Chapel End	149	14%	160	15%	134	12%	103	10%	546	1078	51%
Upper Walthamstow	15	3%	29	5%	77	13%	6	1%	127	595	21%
William Morris	79	8%	30	3%	148	16%	52	6%	309	932	33%
Wood Street	184	27%	44	6%	202	29%	67	10%	497	688	72%
Hoe Street	76	8%	40	4%	209	23%	24	3%	349	907	38%
High Street	139	17%	0	0%	118	14%	17	2%	274	834	33%
St James	77	9%	23	3%	222	25%	38	4%	360	883	41%
Markhouse	64	10%	0	0%	160	25%	23	4%	247	635	39%
WALTHAMSTOW SUB-TOTAL	836	11%	398	5%	1,515	20%	409	5%	3,158	7,645	41%
LEYTON & LEYTONSTONE											
Lea Bridge	68	7%	24	2%	28	3%	39	4%	159	1035	15%
Leyton	118	13%	55	6%	269	29%	18	2%	460	942	49%
Grove Green	38	3%	60	5%	52	4%	35	3%	185	1224	15%
Forest	54	5%	130	13%	224	23%	35	4%	443	983	45%
Leytonstone	104	13%	0	0%	387	47%	34	4%	525	825	64%

Cathall	25	4%	0	0%	26	4%	44	8%	95	581	16%
Cann Hall	137	13%	72	7%	55	5%	68	6%	332	1060	31%
LEYTON & LEYTONS TONE SUB-TOTAL	544	8%	341	5%	1,041	16%	273	4%	2,199	6,650	33%
Totals	1,792	10%	954	5%	3,458	19%	1,051	6%	7,255	18,618	39%

There are **10** wards where the number of full daycare places are below the Borough average (19%), Endlebury, Valley, Chapel End, Upper Walthamstow, William Morris, High Street, Lea Bridge, Grove Green, Cathall and Cann Hall.

The wards where the percentage of full daycare places are higher than the Borough average tend to be those where there are major tube, mainline or bus stations, as some families, particularly those working families requiring full day-care, will choose to take up childcare in the vicinity of their departure station rather than the ward of their residence.

In Hatch Lane & Highams Park North, High Street, Markhouse, Leytonstone and Cathall Wards, there is no PVI sector pre-school provision but a higher than average level of school based nursery in three of these ward offsets the lack of pre-school, with Cathall being the only exception.

More families that take up full daycare places are likely to travel outside of the ward in which they reside to access their place. Those who only take up their part-time FEEE place generally need their provision to be in the locality of their home address.

There are 10 wards, 5 wards in the Walthamstow area and 5 in the Leyton & Leytonstone area of the borough where the percentage of childminders in below the Borough average of 6% of places available vs the total 0-4 year old population.

4.2.3 Known new place creation development opportunities at ward level

There are a number of early years and childcare place development opportunities currently being developed. It is estimated that these projects will create an estimated **200** additional places for under 5's.

Table 5: Known new place creation development opportunities at ward level

WALTHAMSTOW	
Chapel End	50 additional places to be created Town Hall Redevelopment: The Fellowship Square redevelopment includes a standalone 50+ place nursery/crèche. The developer is currently negotiating a lease with an Ofsted registered provider. Completion of the nursery is anticipated to be 2026-2027
Hoe Street	80 additional places to be created.

	Juniper House Nursery: The development includes a new zero carbon purpose-built nursery. The anticipated completion is in the summer of 2024. The council have chosen a provider and are currently agreeing a lease with that organisation. The new nursery could provide up to 80 new early year places.
WALTHAMSTOW SUB-TOTAL	130
LEYTON & LEYTONSTONE	
Leyton	70 additional places to be created. Coronation Square - The Score Building: We have ensured that the nursery space within the new development will reproduce the purpose-built nursery provision with child numbers that currently operates from part of the existing premises and increase the capacity to accommodate the additional demand as a result of the re-development. The new Coronation Square development, on Council owned land, will provide 750 new homes contributing to the borough's housing need, with 50 per cent of them affordable. The scheme received final planning approval in December 2020 and works are currently underway. In summary, this redevelopment will deliver a brand new bespoke 130 place full day care nursery with outdoor play provision on the ground and 1 st floor levels.
LEYTON & LEYTONSTONE SUB-TOTAL	70
Totals	200

4.3 Demand for Childcare

4.3.1 Population of early years children

GLA population projections for 2025 estimates that there will be 18,618 children under the age of five living in Waltham Forest¹¹. These children may require early years childcare.

The following table shows a breakdown of under 5 population:

Table 6: Breakdown of population by age

Age	Number of Children
-----	--------------------

¹¹ 2022 GLA population projection data

Age 0-1	7,762
Age 2	3,646
Age 3-4*	7,210

* Some four-year-olds will have started reception

4.4 Quality of Early Years and Childcare Provision

4.4.1 Ofsted Outcomes

All early year's 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 Ofsted's Early Years Register, and schools and standalone maintained nursery schools are on the schools register. The grades for both registers are equivalent.

Ofsted publish details of Ofsted inspection outcomes on a regular basis¹². Both schools and early years providers have four possible Ofsted grades: 'outstanding', 'good', 'requires improvement', and 'inadequate'. Some providers are still awaiting their first full inspection. These providers are not included in these statistics.

Information published by Ofsted at 31/03/2023 for childminders and PVI sector providers operating in the Borough and is set out in the table below.

Table 7: Quality of provision in Waltham Forest

	Outstanding	Good	Requires Improvement	Inadequate
Waltham Forest	10%	84%	5%	1%
England	14%	82%	2%	1%

Overall, the quality of provision in Waltham Forest is good with 94% of providers achieving a 'Good' or 'Outstanding' Ofsted inspection outcome, which is 2 percentage points below national averages.

96% of children taking up their FEEE place attend a Good or Outstanding Ofsted rated provider which is 1 percentage point above London and 2 percentage points above England

Early years providers are provided with a comprehensive range of free information, advice and training by the Council's Early Years Childcare service as well as Speech and Language Therapists to support Early years professionals in improving and maintaining a high quality, safe and inclusive provision.

¹² <https://public.tableau.com/views/Dataview/Comparelocalauthorityareas?:showVizHome=no>

Early years providers are supported to empower parents/carers as prime educators of their children via the Learning Together Programme which incorporates the Chit Chat Pitter Pat Facebook and Instagram pages.

4.4.2 Children's Development Outcomes

The statutory Early Years Foundation Stage (EYFS) framework requires the EYFS profile assessment¹³ to be carried out in the final term of the year in which a child reaches age 5, and no later than 30 June in that term.

The EYFS profile is intended to provide a reliable, valid, and accurate assessment of each child's development at the end of the EYFS. It is made up of an assessment of the child's outcomes in relation to the 17 early learning goal (ELG) descriptors. Practitioners are expected to use their professional judgement to make these assessments, based on their knowledge and understanding of what the child knows, understands, and can do.

The EYFS profile is a statutory assessment of children's development at the end of the early years' foundation stage (known as a summative assessment). Day-to-day informal checking of what children have learnt will inform teaching and learning on an ongoing basis throughout the final year of the EYFS. This will include identifying areas where children may be at risk of falling behind, so that practitioners can provide rapid, effective support.

Children are defined as having reached a Good Level of Development (GLD) at the end of the EYFS if they have achieved at least the expected level for the ELGs in the prime areas of learning and the specific areas of mathematics and literacy. This helps teachers and parents to understand broadly what a child can do in relation to national expectations. In addition, the EYFS profile provides a national child learning and development data set at the end of the EYFS.

Waltham Forest's Early Years Foundation Stage Profile (EYFSP) data 2022¹⁴ showed that:

- At the end of academic year 2021/22 the average point score in Waltham Forest was 31.4, this is **similar to the national and London average of 31.1**.
- **72.7% of children had a good level of development (GLD)**, 7.5 ppts **above the England Average (65.2%)**; and 71.5% of children were at the expected level for all 17 early learning goals, 8.1 ppts above the England Average (63.4%)
- There is an achievement gap of 12.1% between children eligible for FSM's and all other pupils. This achievement gap is 6.4% **narrower than national gap** which is 18.5%.
- Waltham Forest's GLD 2021/22 **performance is in the top quartile of England and London LAs**;

¹³

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1024319/Early_years_foundation_stage_profile_handbook_2022.pdf

¹⁴ <https://data.london.gov.uk/dataset/early-years-foundation-stage-profile-assessment-results>

- England LAs rank (5th) and London rank (2nd)

Children's levels of development at the end of the EYFS are higher than London and England across most measures.

4.4.3 Supporting children with learning & development (L&D) delay or SEND

Identification of children with learning and development delay and ensuring that timely and appropriate support is provided to ensure that they achieve their maximum potential is a key priority for us. In line with this we have made the following 5 commitments:

- Clear and accessible Early Years L&D delay information and services for parents, carers and professionals.
- Children and their families are supported by joined up services through their Early Years.
- Parents and Carers are empowered to make informed decisions for their child with L&D delay and family.
- Early Years provisions and services are high-quality, inclusive, and safe for children with L&D delay.
- Community resources and groups for Early Years children with L&D Delay are utilised and celebrated.

The Council also has a statutory duty to secure information, advice and training for providers in their area on meeting the needs of children with special educational needs and disabilities. In line with this duty, we provide a comprehensive package of free support to schools and Ofsted registered providers including:

- A core offer of information, advice and training as well as SEN Inclusion Funding (SENIF) to enable settings identify and support children with L&D delay/SEND who do not have an Education Health and Care Plan (EHCP)
- Early Years Inclusion pathway for children with learning and developmental delay and SEND which provides high quality and timely support to children attending an early years setting as well as those who do not. Approx 500 children are referred to this pathway per year.
- Transition support from home to earlyyears setting, early years setting to school, and from reception to year 1.
- Regular communication with SEND services, Children Social Care and Early Help to ensure children known to them are aware of their FEEE entitlements and are encouraged to take them up.
- Being Two Project Supporting assessment and progress of 2-3-year-old children during this crucial period of their development
- Partnership working between LA's Early Years and SEND Services, NELFT HV and Specialist services to support children with L&D delay and SEND
- Support Empower Enrich (SEE) project
The Support, Empower, Enrich Package includes information, advice and training to support and empower early years provisions to enrich their practice in meeting the needs of children with special educational needs and disabilities.
- SEND passport which includes training regarding behaviour management and supporting well being

- All Talk and Support4talk Projects Joint working between the Early Years and Childcare service and health to provide communication and language support from Speech and Language professionals.

Information obtained as part of the January 2022 early years census showed that:

5.8% of all children taking up their 2-year-old FEEE place had SEN which was 0.9 percentage points above London and 1.7 percentage above England

0.7% of all children taking up their 2-year-old FEEE place had an EHCP in place which was 0.2 percentage points above London and England

8.5% of all children taking up their 3–4-year-old FEEE place had SEN which was 0.7 percentage points above London and 1.5 percentage points above England

1.7% of all children taking up their 3–4-year-old YO FEEE place had an EHCP in place which was 0.5 percentage points above London and 0.6 percentage points above England

A higher % of children with SEND are being identified and supported to take up their FEEE place than in London and England

4.4.4 Actions to Maintain Quality of Provision

In order to continue to improve the quality of provision we will:

1. Work towards the overarching strategic aims of giving every child the best start in life and that **every child attends a good or outstanding early years setting**.
2. Continue to work with schools and settings and **provide a range of information, advice and training** to ensure good quality new and existing provision in relation to meeting the requirements of the Early Years Foundation Stage, meeting the needs of children vulnerable and disadvantaged children including those with SEND, effective safeguarding and child protection and business/financial planning.
3. **Undertake continuous monitoring of quality** via Ofsted inspection ratings and Council support to ensure that all settings in the borough are aiming for consistently good provision and expect to get at least a 'good' and ideally an 'outstanding' Ofsted outcome.
4. Continue to implement our Team Around the Setting (TAS) process to **support settings that fail to meet statutory welfare requirements** and **work closely with Ofsted** to inform them of concerns regarding quality and close poor quality provision as appropriate.
5. **Continue to provide SEN Inclusion Funding (SENIF)** to support to settings to make appropriate arrangements to support individual children with the highest levels of additional needs.
6. Work closely with **potential providers** to ensure they have done **adequate market research** and understand the statutory requirements and financial

implications of opening a quality childcare provision and continue to quality assure new provision regarding Business, Safeguarding and Premises compliance & H&S

5.0 Wrap Around Childcare for School Age Children – Breakfast, After School and Holiday Clubs

5.1 Background

The wraparound childcare in Waltham Forest is both diverse and comprehensive, catering to different ages among school-aged children.

This report provides an insight on the wraparound childcare available, including breakfast clubs, after-school clubs, and holiday schemes (also referred to as Out of School Services). The focus is primarily on children of school age, and it's important to note that services for children under 5 years of age have not been considered within this analysis.

It is compulsory for Private, Voluntary and Independent (PVI) sector providers caring for children from 1 September after the child's fifth birthday up until their eighth birthday for more than 2 hours per day to register with Ofsted.

PVI sector providers that only provide childcare for children aged 8 and over do not have to register with Ofsted but may join the voluntary Ofsted register if they choose to.

DfE registered schools can provide breakfast, after school and holiday provision under their school registration for children older than the early years age group, if this provision includes at least one registered pupil of the school.

Parents/carers who access their breakfast, after school and holiday provision from a DfE registered school or Ofsted registered provider (on the compulsory or voluntary register) are able to access the various government subsidy schemes for childcare, e.g. childcare element of Working Tax Credit / Universal Credit and Tax-Free Childcare to assist with reducing childcare costs.

There are also a number of PVI sector providers offering tutoring and coaching activities which would not be considered childcare opportunities for working parents/carers, and in most cases do not require Ofsted registration.

This childcare sufficiency assessment only considers availability of DfE and Ofsted registered provision that is on the Ofsted compulsory register which is available daily between 8am and 6pm. It does not include PVI sector providers offering tutoring and coaching activities regardless of whether they are on the voluntary or compulsory Ofsted register, as they are not available daily between 8am and 6pm which would not be considered childcare opportunities for working parents/carers.

There are 82 schools and Ofsted registered settings that provide childcare for working families. The majority of these provide provide breakfast and after school provision, but only a small number also deliver holiday provision.

14 of the 170 Childminder's registered with Ofsted are only registered on the Childcare register so can only provide childcare to over 5's, the remainder are on both the Ofsted early years and childcare register, but those on the early years register will only care for under 5's, with a small percentage offering out of school provision to over 5's.

Statistics¹⁵ for wraparound childcare places are as follows:

- Breakfast Club Places: 2877
- After School Club Places: 3478
- Holiday Play Scheme Places: 1099

There are 2379 less places available during the school holiday periods compared to after school places available during term-time. The availability of holiday provision for children with SEND also needs to be improved.

An online parent survey was undertaken between April 2022 to August 2022. Parents/Carers were asked a variety of questions including the type of Out of School childcare they use; days they need this childcare and ages of children they need this childcare for. The results of the survey have been analysed and the insights have been reported in this report.

The survey results showed that 25% of respondents required breakfast childcare, 43% required after school and 39% required holiday childcare. Only 17% required all three types of out of school childcare. The majority of respondents required this childcare for their child between the ages of 5 and 8 years old for 2-3 days per week.

Of the 101 respondents who required childcare, 94% responded on the type of childcare they use. 77% opt for formal childcare services and a combination of registered and non-registered childcare services, and 23% of parents/carers meet their childcare requirements through informal childcare arrangements.

An online provider survey was conducted during the same period, which provided valuable insights. Providers were asked about various aspects of their service delivery, including the age range of children for whom they provide childcare, pricing, and operational hours.

Breakfast club services are generally accessible from 7:30 AM to 9:00 AM, while after-school clubs typically operate between 3:00 PM and 6:30 PM. The cost structure varies, with breakfast clubs charging between £2 per hour and £8 per hour, and after-school clubs ranging from £4 per hour to £7 per hour.

Approximately 28% of wraparound care providers extend their services to holiday clubs, offered during Easter, half-terms, Christmas, and summer breaks. These clubs generally operate from as early as 7:30 AM and close as late as 6:00 PM, though some may close earlier between 2:00 PM and 3:00 PM. The prices for these holiday clubs ranges from £15 to £40 per day. Some of the holiday clubs also run free sessions which are funded by the Waltham Forest Holiday Activity and Food (HAF) Programme.

¹⁵ Based on January 2023 school census survey responses and PVI provider data as recorded with Ofsted as at 31st August 2023.

Some of the variances in charges for the provision of breakfast clubs, after school clubs and holiday schemes can be attributed to various Government, Council, Charity and large companies funding schemes to assist with delivery costs e.g. the Governments national school breakfast scheme and holiday activities and food programmes, the Councils Household Support Fund grant to fund breakfasts in schools and Magic Breakfast, Kellogg's and Greggs. A number of these schemes are aimed at schools with the most disadvantaged pupils, which can disadvantage private, voluntary and independent sector providers.

5.2 Summary Gap Analysis at Ward Level- Out of School Provision

The table below provides a high-level summary of the numbers of surplus and deficit places for **Out of School provision for school age children** across each age cohort (children aged 5-9 years old) and provision type across each ward in the borough.

Table 8: Gap Analysis for Out of School Provision

Ward	Total Population Reception to Year 4 classes (4 to 9 year olds)	Total Breakfast Club places needed	Breakfast Club Places available	Breakfast Club Places GAP	Total After School Club places required	Total After School Club places available	After School Club places GAP	Total Holiday Scheme places required	Total Holiday Scheme places available	Holiday Scheme places GAP
Cann Hall	831	115	240	125	199	145	-54	90	80	-10
Cathall	226	31	39	8	54	39	-15	24	120	96
Chapel End	866	120	215	95	207	266	59	94	36	-58
Chingford Green Sub Total	754	105	116	11	180	146	-34	82	0	-82
Endlebury	447	62	70	8	107	70	-37	48	0	-48
Forest	1,137	158	152	-6	272	200	-72	123	130	7
Grove Green	690	96	70	-26	165	140	-25	75	0	-75
Hale End & Highams Park South	579	80	96	16	138	71	-67	63	52	-11
Hatch Lane & Highams Park North	891	124	161	37	213	235	22	97	70	-27
High Street	1,482	206	237	31	354	424	70	161	220	59
Higham Hill	1,116	155	171	16	267	165	-102	121	40	-81
Hoe Street	134	19	30	11	32	30	-2	15	0	-15
Larkwood	723	100	130	30	173	140	-33	78	60	-18
Lea Bridge	336	47	36	-11	80	36	-44	36	0	-36
Leyton	1,183	164	230	66	283	280	-3	128	60	-68
Leytonstone	929	129	110	-19	222	145	-77	101	65	-36
Markhouse	410	57	70	13	98	70	-28	44	100	56
St James	510	71	105	34	122	165	43	55	0	-55
Upper Walthamstow	237	33	26	-7	57	26	-31	26	26	0
Valley	666	93	105	13	159	47	-112	72	0	-72

William Morris	705	98	110	12	168	190	22	76	0	-76
Wood Street	1,949	271	358	87	466	448	-18	211	40	-171
Borough totals	16,801	2,333	2,877	544	4,014	3,478	-536	1,820	1,099	-721

Overall, there are sufficient breakfast club places across most wards with only 5 wards with a small deficit (Forest, Grove Green, Lea Bridge, Leytonstone and Upper Walthamstow).

There is a deficit of after school places across 15 of the 22 wards in the Borough, as demand for these places are 18% higher than for breakfast school places.

There is a deficit of holiday scheme places across 17 of the 22 wards in the Borough, as demand for these places are 14% higher than for breakfast school places.
the borough.

Whilst there are some wards with a deficit of places in some instances these are offset by a surplus of places in neighboring wards, but generally only where the provider can offer a collection service from the school, as parents/carers requiring these services are often not available to transport children between venues themselves.

There were a low number of respondents to the parent/carer Out of School survey, so further work will need to be undertaken as part of a new CSA in the Summer 2024 in order to obtain more representative responses.

Further work will also need to be completed to better understand the demand for free Out of School places required to deliver schemes such as the Governments Holiday Activity and Food (HAF) programme and how many additional places are required for working families who do not meet the criteria for the scheme and require additional childcare hours (HAF schemes only run for 4 hours per day and do not run during all weeks of the school holidays) and those that do not meet the criteria for the scheme and would therefore be paying for their childcare provision.

Appendix A – Methodology

Methodology for calculation of gap analysis for early years and childcare places for under 5's

We ensure that we align with our school place planning by using the same set of population data projections. In this case we have used Resident Population 2025 GLA Population data (produced in July 2022).

Population data also takes into account all known current and future residential developments in the borough provided by the planning service.

Childcare place demand calculations have been updated via information obtained from early years providers, parent/carer surveys and analysis of DfE early years census data.

This CSA summary includes a high-level ward by ward sufficiency snapshot for each age cohort.

Our provider place data is based on Ofsted data as at 31st March 2023 and updated with any new places as at Summer 2023. This data provides us with the maximum number of childcare places a provider can offer childcare to, separated into age cohorts, both for term time and full day care.

We also ensured responses to the parent/carer survey were representative of the demographics of the general population of the Borough in respect of ethnicity and income and that responses were obtained across all areas of the Borough (Walthamstow, Chingford, Leyton and Leytonstone).

Methodology used to calculate the demand and supply of childcare places in Waltham Forest

The table at 3.1 in this report shows the summary gap analysis for places for under 5's at a ward level. The following methodology was used to calculate the surplus / deficit for each age range:

Column A– Under 2-year old's full day care places gap for - working families

The 2025 GLA projections indicate there are 7,762 under 2 year olds in our borough. Under 2's from working families would only be eligible for a FEEE place from the term after they are 9 months old, which equates to a maximum period of 15 months during the period between birth and their 2nd birthday. We have therefore assumed that 15/24 of the total population will require a place, this equated to 4,851 children.

40% of working families with a 3&4 year currently take up their FEEE offer of up to 30 hours per week. We have therefore assumed that 40% of working families with a child under 2 years of age will also take up their FEEE entitlement.

57% of all parents/carers that responded to our survey in summer 2022 stated that they are either using formal childcare or will use formal childcare by the time their child is 1 year old.

Therefore, we worked on the basis that 55% of the total population of under 2's will require a childcare place, which would include 40% working families, 10% growth in demand and 5% that are not eligible for a FEEE place and are paying for their childcare.

We multiplied the 4,851 that we estimate will require a childcare place by 0.55 to reflect the fact that on average, 55% of the families will take up an under 2 place when the child is at least 9 months old.

To establish the number of places available, we looked at all PVI full daycare nurseries, pre-schools, school based provision and childminders that confirmed they offer places for under 2's to arrive at the number of places available.

Based on Census information regarding the pattern of take up of places by families taking up the FEEE entitlement for working families with 3&4 year olds we have estimated that each childcare place could cater for 1.43 children

This gave us the gap/surplus of places available against the demand/need for places.

Column B – 2-year old's places gap: This data relates to gaps or surplus places for full day care, pre-schools, school based nurseries and Childminders

The 2025 GLA projections indicate there are 3,646 number 2-year-olds in our borough.

40% of working families with a 3&4 year currently take up their FEEE offer of up to 30 hours per week. We have therefore assumed that 40% of working families with a 2-year-old child will also take up their FEEE entitlement.

Approx. 25% of the population of 2-year-olds are eligible for a place under the vulnerable and disadvantaged criteria.

Therefore, we worked on the basis that 80% of the total population of 2 year olds will require a childcare place, which would include 40% working families, 25% eligible under disadvantaged/vulnerable criteria, 10% growth in demand and 5% that are not eligible and are paying for their childcare.

To establish the number of places available, we looked at all PVI full daycare nurseries, pre-schools, school based provision and childminders that confirmed they offer places for 2 year olds to arrive at the number of places available.

Based on Census information regarding the pattern of take up of places by families taking up the FEEE entitlement for working families with 3&4 year olds we have estimated that each childcare place could cater for 1.43 children

This gave us the gap/surplus of places available against the demand/need for places.

Column C – 3- & 4-year old's places gap: This data relates to gaps or surplus places for full day care, pre-schools, school based nurseries and Childminders

The 2025 GLA projections indicate there are 7,210 3- & 4-year-olds in our borough. All 3-year-old children are entitled to a FEEE place from the term after they turn 3 years old. Also, some 4-year-olds will be in a school reception class (due to them turning 5 years old within the academic year). This means that not all 3- & 4-year-olds will require a nursery place. Therefore, we have worked on the basis that all 4-year-olds and 7/12th of 3-year-olds and will require a nursery place based on the demographics of eligible children in the Summer Term when most children are eligible. This equates to 5,708 children requiring a place.

To ascertain, how many required a childcare place, we assumed a take up rate of 90% (in line with levels of take up across London), which is an 8% uplift on current take up levels in Waltham Forest.

To establish the number of places available, we looked at all PVI full daycare nurseries, pre-schools, school based provision and childminders that confirmed they offer places for 3&4 year olds to arrive at the number of places available.

Based on Census information regarding the pattern of take up of places by families taking up the FEEE entitlement for working families with 3&4 year olds we have estimated that each childcare place could cater for 1.43 children

This gave us the gap/surplus of places available against the demand/need for places.

Methodology for calculation of gap analysis for breakfast, afterschool and holiday childcare provision for school age children

Methodology for breakfast school childcare provision

The parent/carers survey results showed that 25% of respondents required breakfast club childcare. The majority of respondents required this childcare for their child between the ages of 5 and 8 years old for 2-3 days per week as they used a combination of formal childcare services as well as registered and non Ofsted registered childcare services to meet their childcare needs.

We use schools January 2023 Census to establish the number of children on roll in Reception, Year 1, Year 2, Year 3 and Year 4 (4 to 9 year olds) who may require breakfast club childcare places. This equated to 16,801 children.

We assumed that 4200 of these children would require a place in line with parent/carers survey responses.

To establish the number of places available, we looked at all PVI Ofsted registered childcare providers on the childcare register that confirmed they offer breakfast club places and the number of places they provide plus the number of breakfast club places report as available in DfE registered schools as part of their January 23 census return.

Based on parent/carers only requiring breakfast club childcare for 2-3 days per week we have estimated that each childcare place could cater for 1.8 children

This gave us the gap/surplus of places available against the demand/need for places.

Methodology for after school club childcare provision

The parent/carers survey results showed that 43% of respondents required after school club childcare. This also aligns with 40% of families taking for the free early education offer for 3 & 4 year old childcare from working families. The majority of respondents required this childcare for their child between the ages of 5 and 8 years old for 2-3 days per week as they used a combination of formal childcare services as well as registered and non Ofsted registered childcare services to meet their childcare needs.

We use schools January 2023 Census to establish the number of children on roll in Reception, Year 1, Year 2, Year 3 and Year 4 (4 to 9 year olds) who may require breakfast club childcare places. This equated to 16,801 children.

We assumed that 7244 of these children would require a place in line with parent/carer survey responses.

To establish the number of places available, we looked at all PVI Ofsted registered childcare providers on the childcare register that confirmed they offer breakfast club places and the number of places they provide plus the number of after school club childcare places reported as available in DfE registered schools as part of their January 23 census return.

Based on parent/carers only requiring after school club childcare for 2-3 days per week we have estimated that each childcare place could cater for 1.8 children

This gave us the gap/surplus of places available against the demand/need for places.

Methodology for holiday scheme childcare provision

The parent/carers survey results showed that 39% of respondents required after school club childcare. This also aligns with 40% of families taking for the free early education offer for 3 & 4 year old childcare from working families. The majority of respondents required this childcare for their child between the ages of 5 and 8 years old for 2-3 days per week as they used a combination of formal childcare services as well as registered and non Ofsted registered childcare services to meet their childcare needs.

We use schools January 2023 Census to establish the number of children on roll in Reception, Year 1, Year 2, Year 3 and Year 4 (4 to 9 year olds) who may require breakfast club childcare places. This equated to 16,801 children.

We assumed that 6552 of these children would require a place in line with parent/carer survey responses.

To establish the number of places available, we looked at all PVI Ofsted registered childcare providers on the childcare register that confirmed they offer breakfast club

places and the number of places they provide plus the number of holiday scheme childcare places reported as available in DfE registered schools as part of their January 23 census return.

Based on parent/carers only requiring holiday scheme childcare for 2-3 days per week we have estimated that each childcare place could cater for 1.8 children. We also assumed that children would only require a place for 50% of the holiday period.

This gave us the gap/surplus of places available against the demand/need for places.

Appendix B- Summary Findings from Parent/Carer survey

In the summer of 2022, we conducted a survey of parents/carers, collecting responses from a diverse group of 603 individuals representing various ethnic backgrounds and family incomes. It's worth highlighting that these responses were collected prior to the government's spring budget announcement in 2023.

Employment

The use of childcare and particularly fee-paying childcare is strongly linked to work and the ability to pay.

The figure below shows that that 41% of survey respondents with children under the age of 1, 1-year-olds, and 2-year-olds are engaged in full-time employment, defined as working 30 hours or more per week (including self employed). Additionally, 22% of parents/carers work part time hours between 1 to 29 hours per week while 12% are currently unemployed and not actively seeking for job opportunities.

A further 13% of the respondents are unemployed but actively searching for employment, while the remaining 12% were either retired, volunteering, studying, in training or on long term sick or disabled.

Household annual income and earnings (before tax)

Analysis of the survey responses across under 1s, 1year olds and 2year olds shows that:

- 21.3% of the respondents reported an annual income exceeding £100,000.
- 20.5% of participants reported earning an annual income ranging from £55,000 to £99,000.
- 8.3% of the respondents reported earning between £30,000 and £54,999 annually.
- 31.1% of the respondents reported an annual income of less than £29,999

Additionally, it's noteworthy that 18.8% of the respondents either preferred not to disclose their income, did not have that information readily available, or chose not to provide a response.

Ethnic Diversity

The survey response of the ethnic diversity is reflected in the figure below and summary shows that

- 72.5% of the under 1 respondent are from a background other than White British
- 67.5% of the 1 year old respondent are from a background other than White British
- 63.2% of the 2 year old respondent are from a background other than White British

Special Educational Needs and Disability

Out of the 603 parents/carers who participated in the survey, 460 provided a response. 443 of the parents/carers stated that their child does not have any Special Educational Needs or Disabilities, 17(3.6%) indicated that their children have Special Educational Needs or disabilities (SEND), which is broadly in line with the percentage of the population that have SEND nationally. Among the identified Special Educational

Needs and Disabilities (SEND) needs, Speech, Language, and Communication needs emerged as the most frequently reported area of concern, especially for 2 year olds.

Barrier to accessing childcare

Parents/carers were asked about the barriers they have found with accessing childcare. The key barriers that emerged were:

- 31% reported that they found it hard to find a space for their child at their chosen childcare provider
- 16% found it hard to find a childcare provider to offer the times/hours needed
- 23% found that suitable childcare provider had a waiting list of 12 months plus
- 22% found it hard to find childcare in their locality
- 20% did not know where to find information about childcare

Childcare Locality Preference

A significant proportion of parents/carers expressed a preference for childcare in E17 (Walthamstow) area. 40.3% of parents/carers preferred their childcare to be in the E17 (Walthamstow) Area for under 1s, 44% preferred Walthamstow area for 1year olds and 48.3% of 2 year old parents/carers indicated their preference for Walthamstow area.

Childcare Considerations

In the survey, parents/carers were asked about the top 5 most important factors that they prioritize when making decisions regarding childcare preferences. The top 5 considerations that emerged were:

1. Good quality childcare
2. Proximity to home
3. Affordable childcare
4. Opportunity to learn through play
5. Social opportunities

Other important considerations were also highlighted:

- Good Transportation links
- Accessing support with childcare costs
- Flexibility of hours

Reasons for choosing childcare

Parents/carers were asked to identify 5 reasons they took into account when choosing to use childcare. The top 5 most important factors identified are shown below.

1. So that I can work
2. So that the childcare provider can support my child's learning and development
3. So that my child can take part in different activities
4. So that my child can make friends
5. Because my child enjoys it

These factors collectively reflect the diverse considerations parents and carers consider as reasons to get their child into a childcare provision.

Figure 6: Employment type distribution for under 1, 1-year olds and 2 year olds

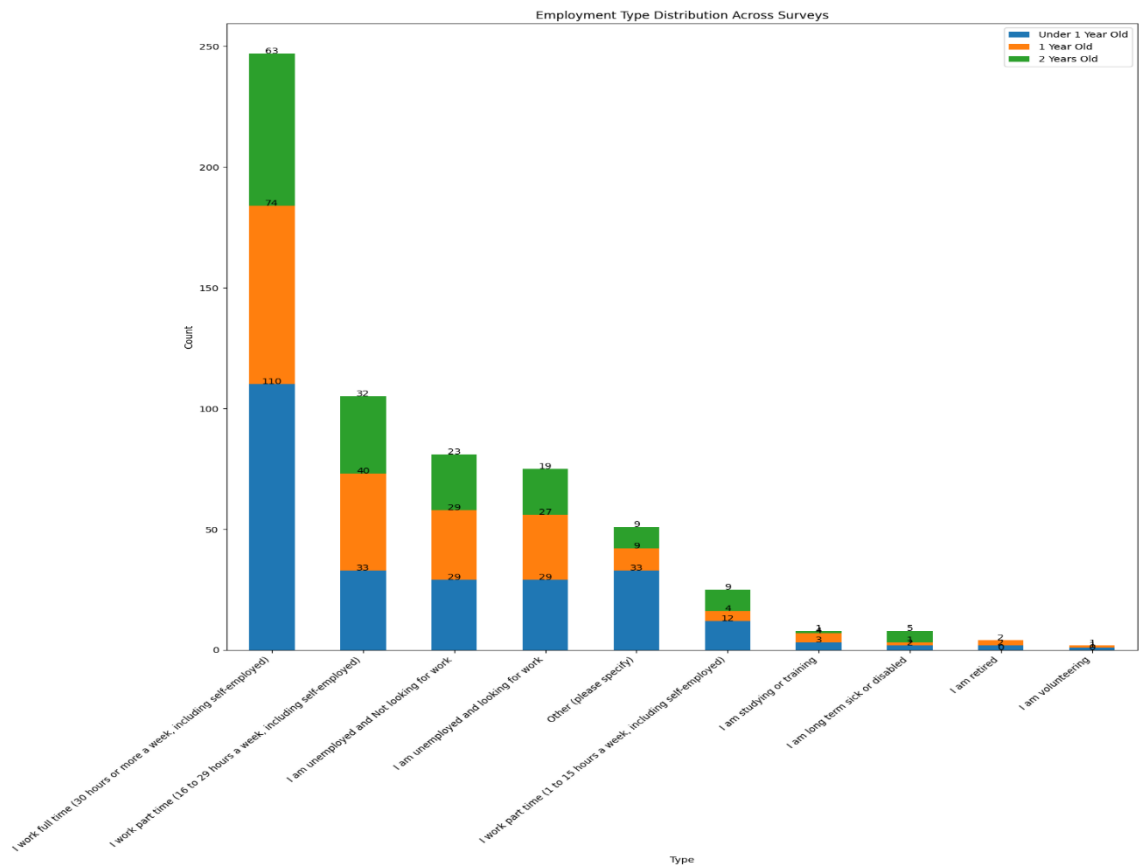


Figure 7: Household Income distribution for under 1, 1 year olds and 2 year olds

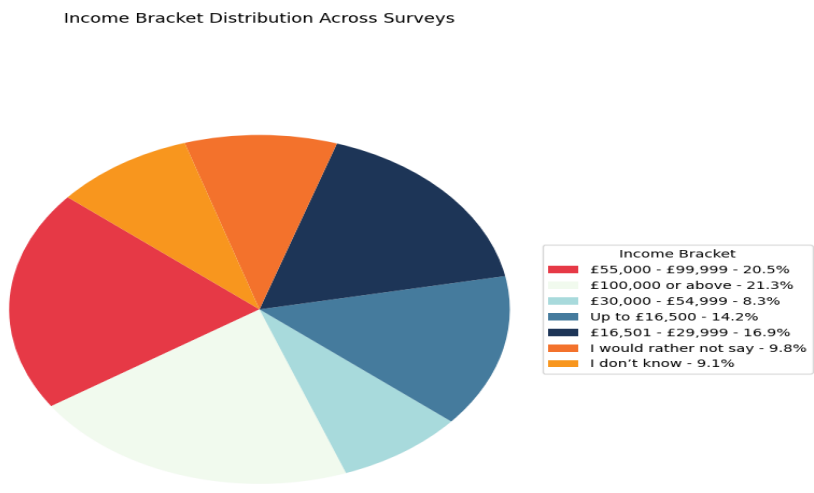


Figure 8: Ethnic Group distribution for under 1, 1 year olds and 2 year olds

Ethnic Group Distribution Across Surveys

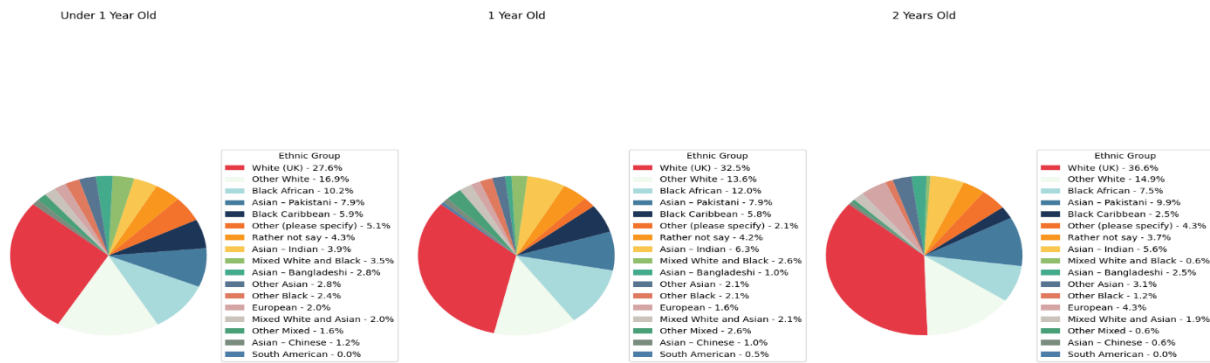


Table 9: Special Educational Needs and Disabilities

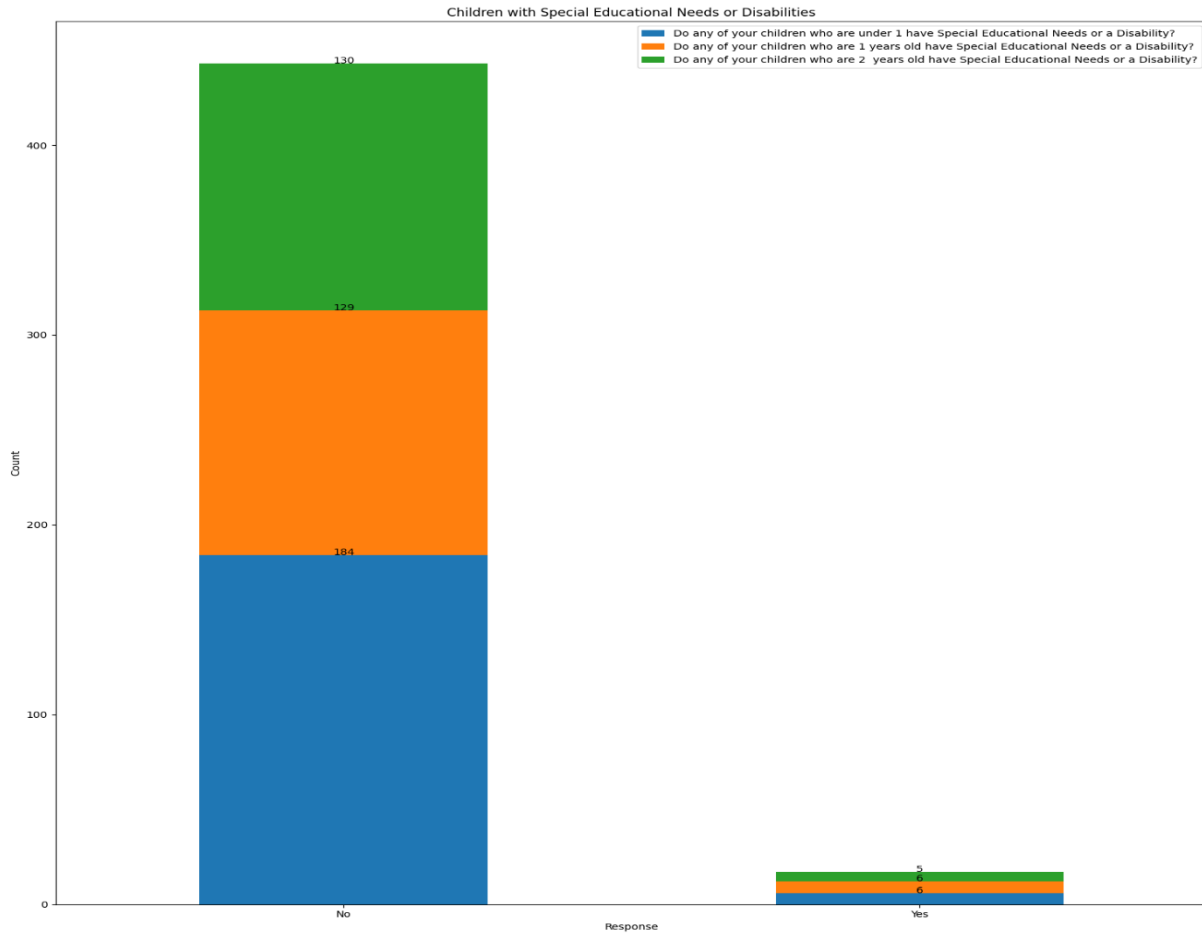


Table 10: Barriers to Childcare

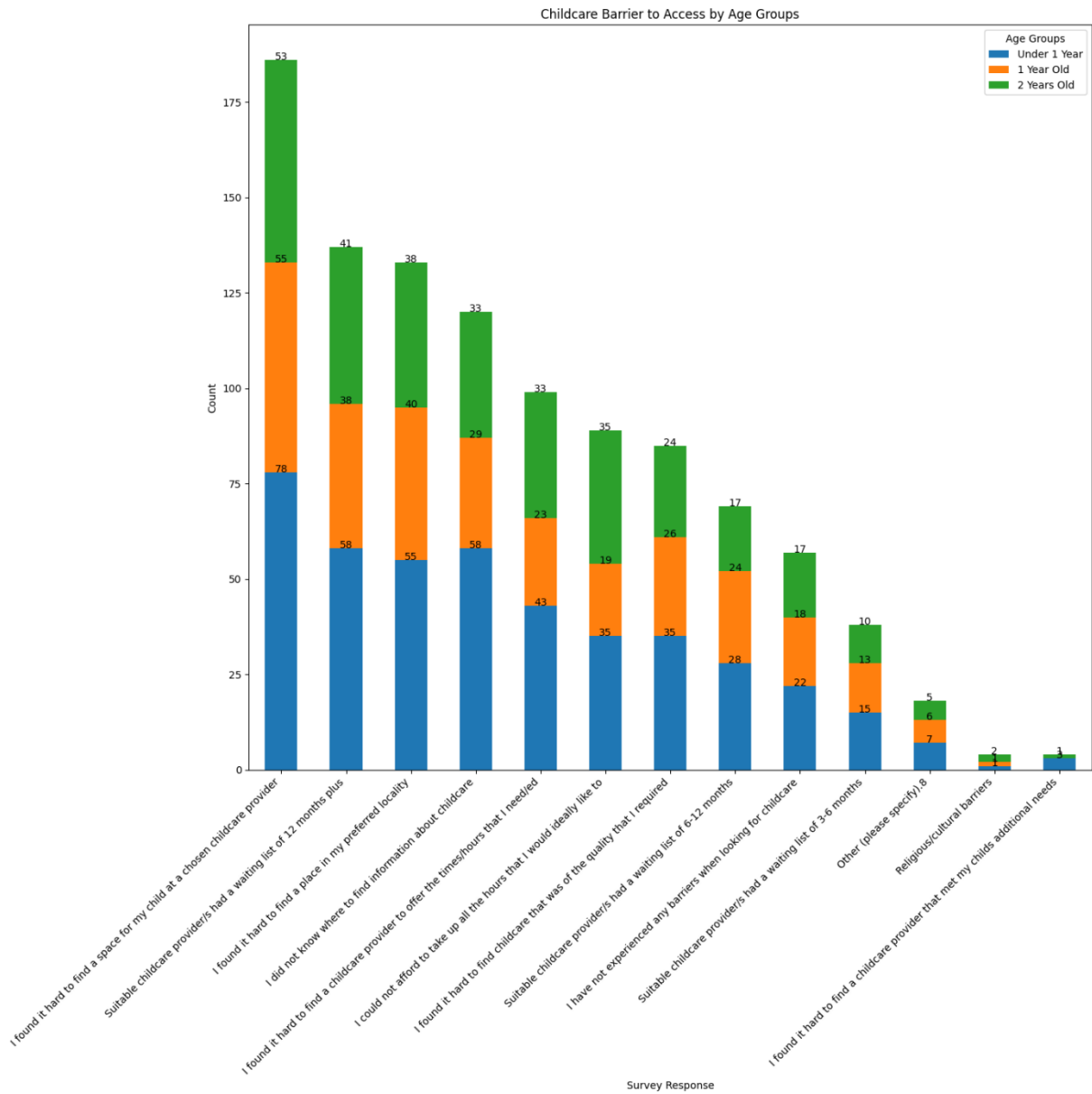


Figure 9: Childcare Locality Preference

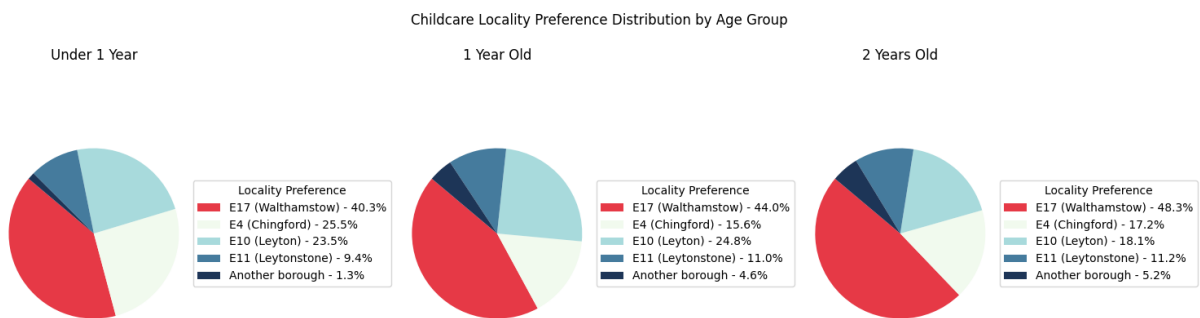


Figure 10: Childcare Considerations

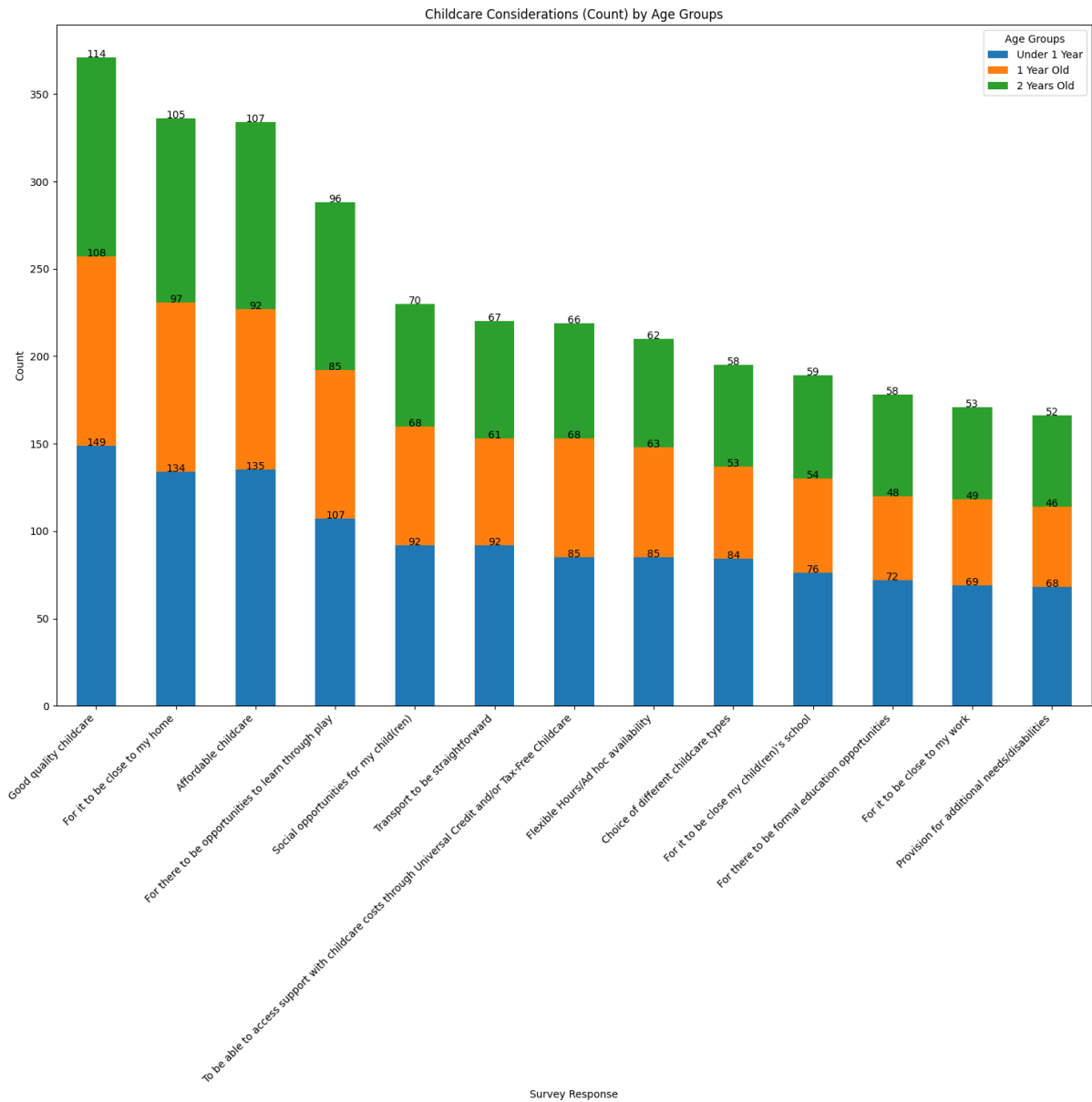
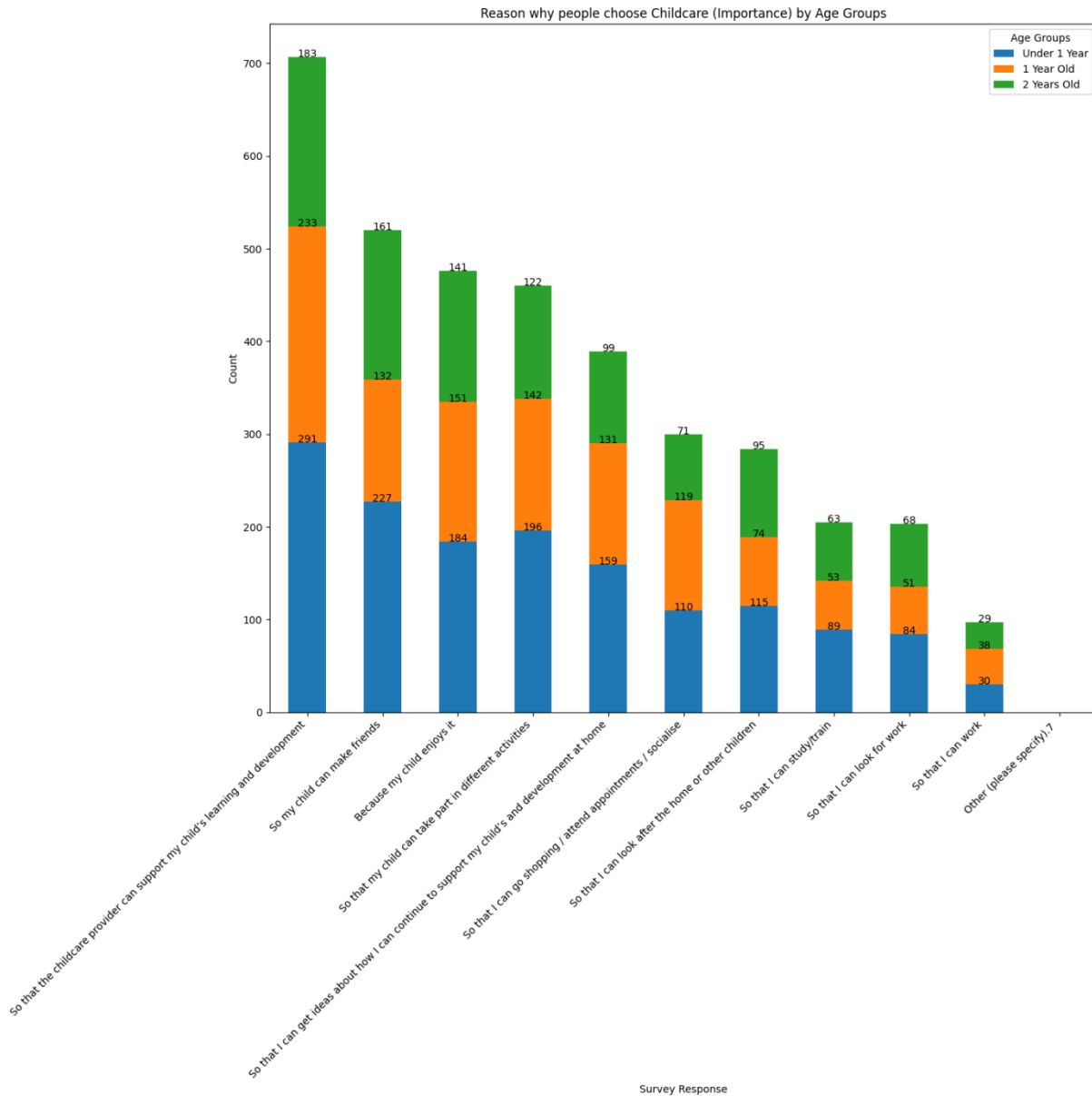


Table 11: Top 5 Reasons for choosing to use childcare



Appendix C- Summary Findings from Provider survey

In addition to surveying parents and carers, we also conducted a survey with Schools and Ofsted registered childcare providers in Waltham Forest. It's important to note that these responses were collected before the government's spring budget announcement in 2023. The survey encompassed feedback from 141 schools, pre-schools, and full-day care nurseries, which has been considered in our analysis.

Waiting List

Whilst waiting list can give an indication of issues with supply vs demand, it is also important to note that a number of families will put their child's name on a waiting list for more than one childcare provider, which will affect the accuracy of any assumptions made in relation to waiting list information.

Childcare providers were surveyed regarding the number of children on waiting lists for different age groups (under 2s, 2-year-olds, and 3 & 4-year-olds) within a 12-month period. On average, there were 20 children on the waiting list for under 2s, 13 for 2-year-olds, and 13 for 3 & 4-year-olds. These waiting lists included children seeking places for either 15 hours per week or 16 to 30 hours per week

It is worth noting that:

- 39% of those on the waiting list were seeking under 2 childcare places for 30 hours per week.
- 39.72% were seeking 2-year-old childcare for up to 15 hours a week.
- Another 39.72% were seeking 3 & 4-year-old places for up to 15 hours per week

Barriers to operating at full capacity

In terms of barriers to operating at full capacity, the survey identified the following based on the responses:

- 21% of respondents cited difficulties in recruiting staff as a significant barrier.
- A small percentage, 1.4%, noted that maternity leave posed challenges.
- 2.8% reported that staff illness was a contributing factor.
- A substantial 32% of respondents mentioned a lack of take-up of available childcare places.
- Additionally, 20% found other factors such as accommodating part-time children for single days, children starting the term following their birthday and adhering to staff-to-child ratios are challenging when operating at full capacity.

Figure 11: Average Number of Children on Waiting List

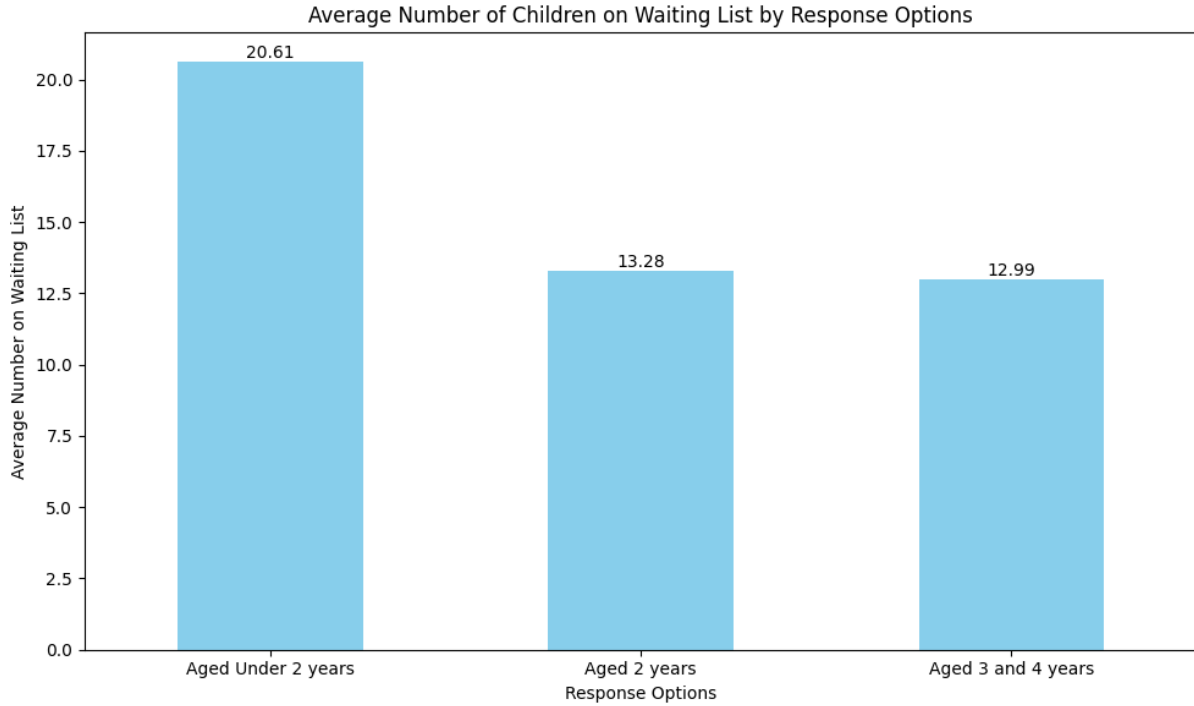


Figure 12: % number of children on waiting list

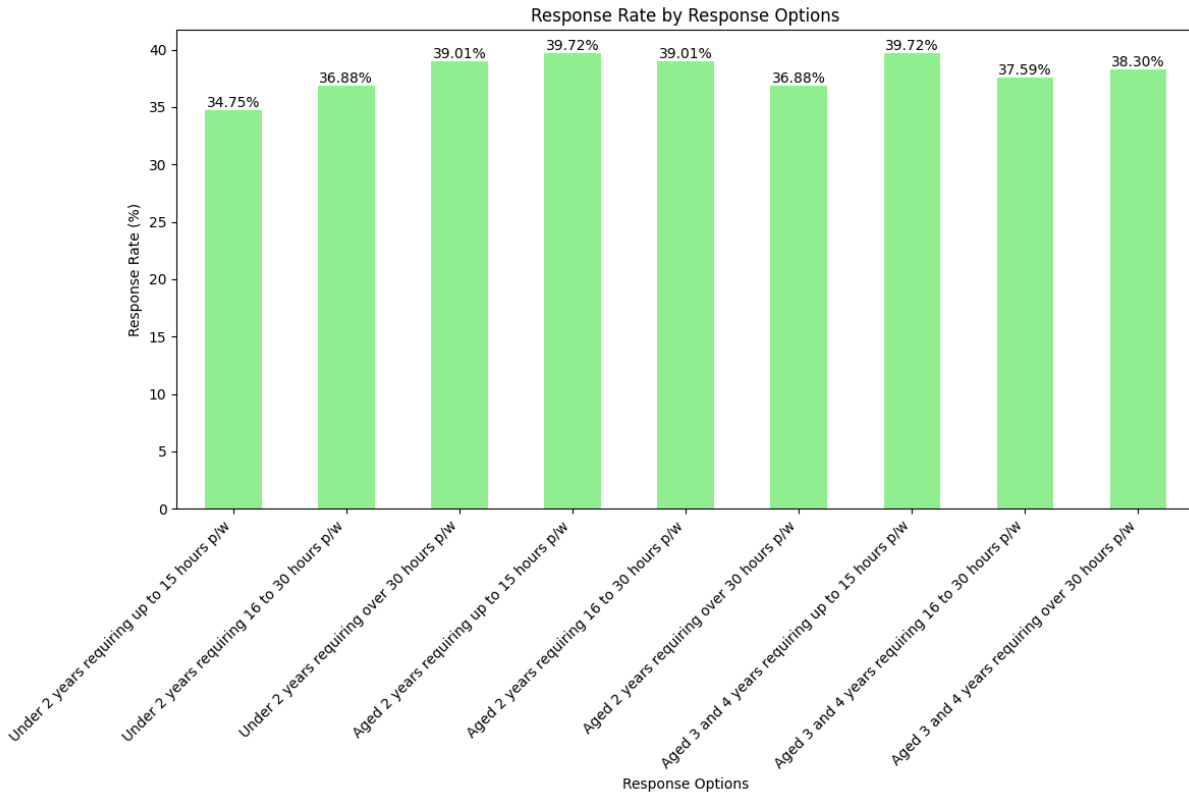
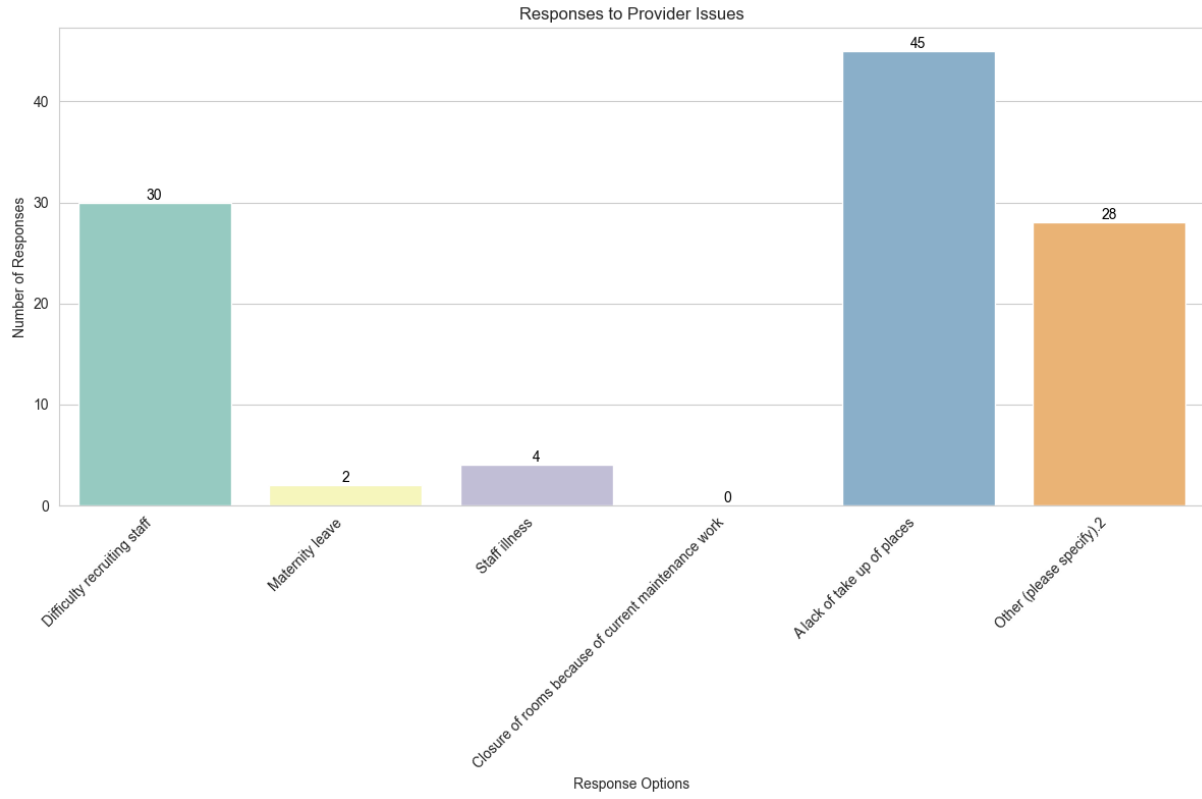
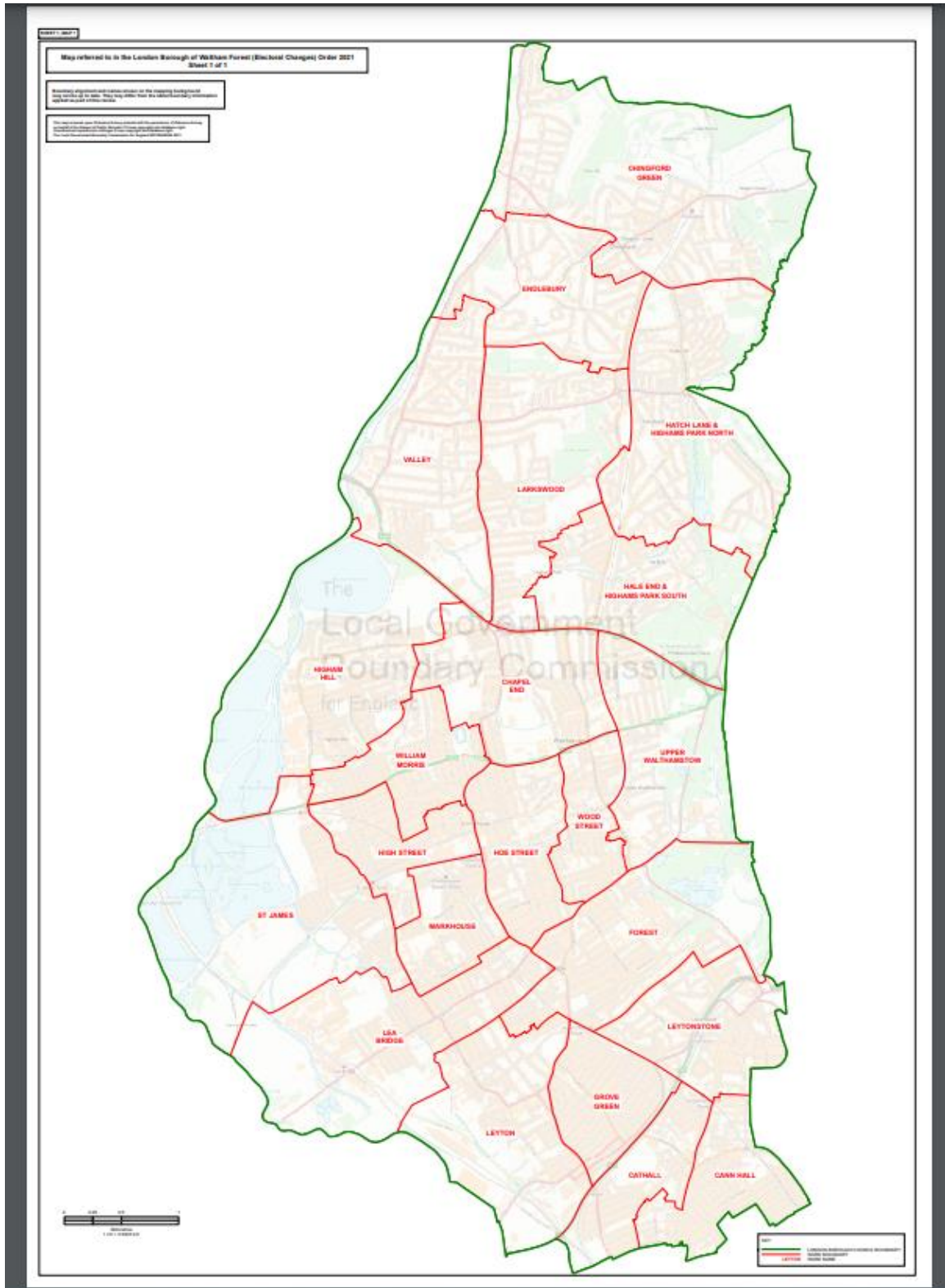


Figure 13: Barriers to operating at full capacity for providers



Appendix D– Map of the wards in Waltham Forest



Appendix E – Glossary of Terms

Term/Abbreviation	Meaning
Ofsted	Means the Office for Standards in Education, Children’s Services and Skills. They inspect services providing education and skills for learners of all ages and also inspect and regulate services that care for children and young people. https://www.gov.uk/government/organisations/ofsted
EYFSP	Means <u>Early Years Foundation Stage Profile</u> carried out annually in the final term of the year in which a child reaches age 5, and no later than 30 June in that term.
ELG	Means Early Learning Goals. 17 early learning goals that most children are expected to achieve based on typical development at the age of 5 as set out in the EYFSP.
GLD	Means Good level of Development. Children are defined as having reached a Good Level of Development (GLD) at the end of the EYFS if they have achieved at least the expected level for the ELGs in the prime areas of learning and the specific areas of mathematics and literacy.
DfE	Means the Governments Department for Education. https://www.gov.uk/government/organisations/department-for-education
SEND	Means Special Educational Needs or a Disability. Schools and Ofsted registered childcare providers must comply with the SEND Code of Practice to meet the needs of children with SEND. https://www.gov.uk/government/publications/send-code-of-practice-0-to-25
L&D	Means Learning and Development of children under 5
Provider/Early Years Setting	Means: <ul style="list-style-type: none"> • an Early Years Provider other than a childminder registered on the Ofsted Early Years Register. • a childminder registered on the Ofsted Early Years Register. • a childminder registered with a childminder agency that is registered with Ofsted; or • schools taking children of an age which are exempt from registration with Ofsted as an early years Provider.
EHCP	Means Education Health and Care Plan. An education, health and care (EHC) plan is for children and young people aged up to 25 who need more support than is available through special educational needs support. EHC plans identify educational, health and social needs and set out the additional support to meet those needs.

	https://www.gov.uk/children-with-special-educational-needs/extra-SEN-help
FEEE	Means the Free Early Education Entitlement to free early education and childcare to eligible 2, 3 & 4 year olds as defined by the Department for Education; https://www.gov.uk/find-free-early-education
EYFS	Means the Early Years Foundation Stage Statutory Framework issued by the Department for Education. https://www.gov.uk/government/publications/early-years-foundation-stage-framework--2 which all DfE registered schools and Ofsted registered providers must comply with when providing services to children under statutory school age
SENIF	Means Special Educational Needs Inclusion Fund. SENIF funding available to early years providers for supporting children with learning and developmental delay or SEND without the need for an EHCP. The funding is for use in the early years provision that the child attends and will be paid to the provider to be used to support the needs of the identified individual child.
PVI sector	Means Private, Voluntary and Independent (PVI) early years sector
CSA	Means Childcare Sufficiency Assessment. The CSA identifies gaps in the childcare market, so that we can plan how to support the market to ensure sufficient childcare provision. CSA duty is set out in Part A and B of the <u>Governments Statutory Guidance for LA's document</u>
Ward	Means a ward is a local authority area, typically used for electoral purposes.
NELFT	Means North East London NHS Foundation Trust. NELFT provides an extensive range of integrated community and mental health services for people living in the London boroughs of Barking & Dagenham, Havering, Redbridge and Waltham Forest https://www.nelft.nhs.uk/services-waltham-forest/
15 minute neighbourhoods	Means Waltham Forest strategy to ensure every one of our residents can easily access what they need to live a fulfilling and healthy life within their local area. https://www.walthamforest.gov.uk/council-and-elections/about-us/waltham-forest-public-service-strategy/priority-3-our-15-minute
Ofsted registered places	Means the maximum number of children, within a certain age range, that can be on site at any one time in line with the number their Ofsted registration number.
Ofsted inspection outcome	Means the effectiveness of the provision delivered by an Ofsted registered organisation, based on a 4 point scale grade 1: outstanding <ul style="list-style-type: none"> • grade 2: good • grade 3: requires improvement • grade 4: inadequate

	https://www.gov.uk/government/publications/early-years-inspection-handbook-eif/early-years-inspection-handbook-for-ofsted-registered-provision-for-september-2021
DfE registered schools	Means a school registered with the Governments Department for Education. https://www.get-information-schools.service.gov.uk/
Ofsted registered providers	Means an organisation registered with Ofsted to provide early education and childcare. https://www.gov.uk/government/organisations/ofsted
TAS	Means the Councils Team around the Setting process. https://thehub-beta.walthamforest.gov.uk/runningyourbusiness#tas
Waltham Forest Local Plan (LP1)	The Local Plan sets out our planning policy. It is used to shape developments and guide decisions on where, how much, and what kind of development is needed. https://www.walthamforest.gov.uk/planning-and-building-control/planning-policy/local-plan
Infrastructure Delivery Plan (IDP)	The Infrastructure Delivery Plan (IDP) is an essential document supporting the Borough's New Local Plan to ensure that development happens in the right places at the right time, in a coordinated way. https://www.walthamforest.gov.uk/planning-and-building-control/planning-policy/infrastructure-delivery-plan
Strategic Asset Management Plan	This Strategic Asset Management Plan (the 'SAMP') is a detailed companion document to the Property Transformation Strategy and establishes the Council's approach to the management of its property portfolio. https://www.walthamforest.gov.uk/businesses/commercial-property/estates-management
Planning Obligations Supplementary Planning Document adopted May 2017	This Supplementary Planning Document provides guidance for developers, applicants and landowners on planning obligations and Section 106 agreements. It sets out how these work alongside the Community Infrastructure Levy (CIL) to ensure we secure the appropriate contributions needed to support local growth. https://www.walthamforest.gov.uk/planning-and-building-control/planning-policy/supplementary-planning-documents
Section 106	Means S106 contributions. These remain the primary means for boroughs to ensure that developments pay for infrastructure that supports them. However, only 7% of developments attract a S106 agreement, and agreements are by their nature uncertain in terms of what they can deliver. S106 contributions are negotiated between boroughs and developers and can pay for anything from new schools or clinics to roads and affordable housing. https://www.walthamforest.gov.uk/planning-and-building-control/planning-policy/planning-obligations
CIL	Means Community Infrastructure Levy. Introduced by the Planning Act 2008, local authorities are allowed, but not required to introduce a CIL. CIL is different to S106 in that

	<p>it is levied on a much wider range of developments and according to a published tariff schedule. This spreads the cost of funding infrastructure over more developers and provides certainty as to how much developers will have to pay. https://www.walthamforest.gov.uk/planning-and-building-control/planning-policy/community-infrastructure-levy</p>
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