

<b>Committee:</b>	<b>Dated:</b>
Community and Children's Services Committee	06/11/2020
<b>Subject:</b> Childcare Sufficiency Assessment	<b>Public</b>
<b>Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly?</b>	1,2,3,4
<b>Does this proposal require extra revenue and/or capital spending?</b>	<b>No</b>
<b>Report of:</b> Andrew Carter, Director of Community and Children's Services	<b>For information</b>
<b>Report author:</b> Theresa Shortland, Head of Service – Education and Early Years	

### Summary

This Childcare Sufficiency Assessment (CSA) is an analysis of the supply and demand of childcare provision in the City of London and of how well the childcare needs of local parents are being met. It measures the effectiveness of the City's childcare market by identifying any supply–demand gaps and makes recommendations as to how the City of London should plan to address them in the forthcoming planning period.

The 2020 CSA also analyses the evolving effects of the 2020 COVID-19 outbreak on the City of London's Childcare and Early Years market. All responding Early Years childcare providers and settings were asked whether, prior to COVID-19, their setting was able to meet the demand it experiences for funded childcare: all stated "yes". All continued to be able to do so during the COVID-19 outbreak.

The City of London Childcare Accessibility Scheme aims to support resident families to access early education and childcare through an early education place. The purpose of the early education place is to support the child's early development and empower parents to make positive changes to their lives through work, training or family support.

The overall assessment of the sufficiency of childcare in the City confirms that there are sufficient good-quality childcare places for children aged 0–4 years, aligned to vacant places as of summer 2020. This situation will, however, require ongoing monitoring, including the changing developments associated with COVID-19.

### Recommendation

Members are asked to: Note the report.

## Main Report

### Background

1. This CSA is an analysis of the supply and demand of childcare provision in the City of London, and of how well the childcare needs of local parents are being met. It measures the effectiveness of the City's childcare market by identifying any supply–demand gaps and makes recommendations as to how the City of London should plan to address them in the forthcoming planning period.
2. Statutory guidance for local authorities (June 2018) outlines the requirements for English local authorities aligned to their duties pursuant to section 2 of the Childcare Act 2016 and sections 6, 7, 7A, 9A, 12 and 13 of the Childcare Act 2006.
3. This 2020 City of London CSA outlines how the City is meeting its duty to secure sufficient childcare, and highlights the requirements outlined in the guidance.
4. The City of London Childcare Accessibility Scheme aims to support resident families to access early education and childcare through an early education place. The purpose of the early education place is to support the child's early development and empower parents to make positive changes to their lives through work, training or family support.
5. The 2020 CSA also analyses the evolving effects of the 2020 COVID-19 outbreak on the City of London's Childcare and Early Years market, and reports on factors including: (a) take-up and awareness of the City of London Childcare Accessibility Scheme; and (b) the awareness of the City of London Family and Young People's Information Service.
6. In terms of COVID-19, the primary aims of the research were to determine:
  - the impact of COVID-19 on the ongoing sustainability of Early Years childcare provision
  - what types of support the City of London's Early Years childcare sector would welcome in terms of an ongoing revival and recovery from the imposition of the national lockdown
  - the ongoing challenges caused by COVID-19
  - the extent to which Early Years 0–5 years childcare providers and settings had benefitted from the Government's financial support measures that were made accessible to businesses, starting from April 2020.
7. As with the 2018 City of London CSA, an approach combining qualitative and quantitative methods was undertaken to provide a robust and in-depth analysis of the emerging gaps and themes – including those aligned to COVID-19. This approach was based on the premise that each family is unique and potentially in search for formal childcare that would meet their needs, values, cultural requirements and personal circumstances.

## **Current Position – Childcare provision**

8. The childcare providers located in the City that are registered by Ofsted to care for children in the Early Years pre-school 0–5 years group are subject to the legal provisions for the regulation and inspection of provision for children. All of the Early Years childcare providers and settings situated in the City of London local area are judged ‘Outstanding or Good’ by Ofsted.
9. The 2020 CSA fieldwork confirmed that several City of London resident families do not use registered childcare; they continue (as with the 2018 CSA) to either provide childcare themselves, through their families, or they employ nannies with a relative high frequency, in comparison to other London Boroughs.
10. In 2020 in the City of London, eight of the Early Years childcare providers/settings have places occupied by children accessing the free 2-year-old early education entitlement and the universal 15 hours of free childcare during term time for 3- and 4-year olds.
11. The average hourly fee charged by City-based Private Voluntary and Independent Early Years childcare providers/settings was £10.13/hour – ranging from £8.73/hour to £14.00/hour.
12. Of the parents and carers who were consulted for the summer 2020 CSA: 63% stated that they were using at least one type of formal childcare – that is, a day nursery, a pre-school, a (non-City based) childminder or an out-of-school club, term-time or holiday time; 37% stated that they were only (in summer 2020) using informal childcare – that is, themselves and/or a partner where relevant, a friend/ neighbour or a nanny/au-pair. The most frequent type of formal childcare being accessed by a City of London-resident parent/carer was a private, voluntary or independent sector nursery, followed by a nursery class in a state school. In terms of informal childcare, 15% of parents were receiving support through grandparents, and 10% were hiring a nanny.
13. As with the 2018 CSA, families with children and young people with special educational needs and disabilities (SEND) used a range of short breaks services to access support during the day, weekends and during the school holidays.
14. In July 2020, there were 18 City of London children and young people with an Education, Health and Care Plan (EHCP). Of these, eight were aged under 10 years, seven were aged 11–15 years and three were aged 16–19 years.

## **City of London Childcare Accessibility Scheme**

15. The City of London Childcare Accessibility Scheme aims to support resident families to access early education and childcare through an early education place. The purpose of the early education place is to support the child’s early development and empower parents to make positive changes to their lives through work, training or family support.
16. The three main types that responding parents and carers stated they had searched for were:

- information about childcare availability in the summer holidays
- information about activities that children and young people with SEND can take part in
- funded childcare.

## Emerging effects of COVID-19

17. The most frequent effect of the 2020 COVID-19 outbreak highlighted by Early Years childcare providers/settings was “financial challenges” or “lost income”. Other repeated effects were: “lost opportunities to meet new customers [parents]”; and “a loss of face-to-face contact with parents and children”. There were several examples of Early Years childcare providers/settings having plans to re-energise income generation as the emergence from lockdown progressed. These included “Raising fees in September 2020”; “Maybe filming ‘show rounds’ and then having a video chat with interested parents, involving a likely key worker”; and “Making better use of social media and virtual tours to generate interest and demand”.

## Key Findings – Themes 2020

18. Theme: Type of childcare /Age of child: All parents/carers – whether they were using formal or informal childcare in summer 2020 – were invited to state whether there was any type of formal City of London-based childcare that they would like to access in the near future (which they were not accessing in summer 2020). A relatively high percentage stated “pre-school/playgroup”. These parents tended to be Barbican residents, and this therefore highlighted the relative importance of the ongoing sustainability of the Barbican Playgroup.

19. As is common with other inner-London Boroughs, the population of older school-aged children in the City of London is forecast to increase in coming years at a greater rate than the population of young (pre-school aged) children. The City of London therefore should retain a strategic awareness that demand for out-of-school childcare provision, (that is, after-school club, before-school, and holiday time provision), might become more pronounced. Indeed, when parents/carers were invited to state what types of formal childcare they intend to use in future years, the second and third most frequent types were: a holiday play scheme (20% of all responding parents and carers) and then an after-school club (18%).

20. Theme: Affordability: The second most frequent ‘barrier’ to accessing formal childcare stated by a parent who participated in the 2020 CSA was: “I could not afford the childcare that I require”. Encouragingly, 21% of the respondents stated that they do not use formal childcare as it is too expensive; this is compared to 39% who made such a statement in 2018. However, 20% of parents/carers consulted for the 2020 CSA stated that they were aware of the existence of the City of London’s Childcare Accessibility Scheme (most frequently via City of London Child and Family Centre), and half of these respondents stated that they did not qualify.

21. Theme: Sustainability: Three of the eight City of London-based Early Years childcare providers/settings outlined that they had a significant number of childcare vacancies in summer 2020. These vacant places were across all age groups 0–4 years, though tended to be highest for 3- and 4-year olds. Feedback from representatives of relevant settings was that vacant places had increased, aligned to the progression of

COVID-19. Each of the City of London-based Early Years childcare providers/settings expressed concerns, (to differing degrees), about the possibility of a second 2020 COVID-19 lockdown – possibly during winter 2020/21. Their concern was aligned to their ongoing sustainability and, in certain cases, the increase in vacant places and loss of income from fees in 2020.

22. Parents/carers were requested to state whether they had ever experienced any barriers when trying to access childcare in the City of London locality: 36% stated that they had, with the most frequent barrier being: “Concerns about COVID-19” – stated by a third of all responding parents. This percentage could indicate that certain parents – that is, customers of childcare providers – may be reluctant about returning to provisions as the 2020/21 period continues. It was evident via analysis of the 2020 CSA parents/carers survey that COVID-19 concerns were most frequently aligned to COVID spreading in “a nursery”, a term which constitutes the majority of formal childcare in the City of London.
23. Theme: Special Needs: Almost one-quarter of parents/carers consulted for the 2020 City of London CSA outlined that they had a child with special needs and/or disabilities, or they had a young child with (as yet) undiagnosed needs. It is typical within all inner-London Boroughs for the incidence of children with special needs and/or disabilities to be increasing. A repeated request made by the City of London-based Early Years childcare providers/settings was for more training, to support their staff being able to identify special and additional needs at an early age. Such training has indeed been consistently offered to them by the City of London. A skills and training audit will be undertaken in Early Years settings in Autumn 2020, and accessibility to such training will be reiterated by the City of London.
24. During the 2020 CSA, a number of young people with special needs and/or disabilities outlined that they would welcome out-of-school activities that were more aligned to the theme of ‘play’ as well as those that aligned to ‘learning’. Three repeated requests for young people with SEND were for the establishment of:
- a green space and/or garden to be responsible for and use as a meeting place
  - a SEND Arts club
  - a SEND Bike club.

### **Proposals – 2020 CSA strategic recommendations**

25. The overall assessment confirms that there are sufficient good-quality childcare places for children aged 0–4 years in the City, aligned to the incidence of vacant places, as of summer 2020. This situation will, however, require ongoing monitoring, including the changing developments associated with COVID-19.
26. The 2020 assessment has identified some challenges that should be considered, aligned to the following strategic recommendations:
- A) The City of London should consider how it can continue to demonstrate to its Early Years childcare providers/settings that it will help them to fill vacant places.
- B) The 2020 City of London CSA has highlighted a possible forthcoming sustainability concern for the locality’s private, voluntary and independent nurseries, including alignment with: (a) parental concerns about COVID-19; and (b) depleted occupancy

levels post the 2020 outbreak. The relevant City of London officers need to ensure that the risk of closures is mitigated and that the issue is monitored and viewed through a prism of a possible requirement for traditional commercial (and fundamental) business support for small enterprises.

C) Approximately one-third of parents and carers who provided feedback for the 2020 City of London CSA outlined that they had (to varying extents) concerns about COVID-19, which reached a level where they were worried about their children attending a day-care setting. The City of London may want to consider means via which it can practically help to re-energise and rejuvenate local parental demand for formal Early Years childcare provision, aligned to evidence that certain parents have 'anxieties' around their children safely returning to or starting at a setting, because of COVID-19.

D) Feedback from certain parents and carers who were consulted for the 2020 City of London CSA emphasised that there is a discernible demand for more out-of-school childcare provision for children resident in the North of the City (the Barbican and Golden Lane estates), including for children and young people with SEND. In recognition of this feedback, and the fact that the population of older children resident in the City of London is forecast to increase, the City of London should consider how it can support the establishment of a further out-of-school (childcare) resource, potentially within the Barbican locality.

E) Relevant City of London officers need to continue their work to support Early Years childcare providers/settings with their recruitment and retention of qualified staff – including alignment to the 2020 City of London CSA report finding that there were incidences of provider workforce members having COVID-19 concerns, particularly about travelling safely to work.

F) The City of London Education and Early Years Service should consider further partnership work with local stakeholders such as the Museum of London and the Barbican Centre. Young people with SEND, along with their carers, repeatedly expressed a wish for the possible establishment of: a green space and/or garden that young people with SEND could tend to, be responsible for, use as a meeting place; an Arts club; and a 'Bikes for SEND' club.

G) The City of London should retain an awareness that a number of parents and carers who responded to the consultation for the 2020 City of London CSA wanted the future option of "access to a sessional pre-school/playgroup", and so should monitor the (currently secure) availability of such sessional provision.

H) The 2020 City of London CSA has provided some positive feedback with regard to the issue of affordability, with fewer parents/carers than in 2018 stating that an inability to afford formal childcare was an issue for them. However, although the Childcare Accessibility Scheme was well received by parents/carers who were aware of its existence, (including those who were benefitting from it), a wider and increased awareness of the scheme needs to be achieved, including in the Portsoken locality.

I) The City of London should consider how it can further support its Early Years childcare providers/settings to produce virtual online tours of their building and resources, which can be appropriately accessed and viewed by prospective

parents/customers, and can display the preventative and safety measures that are being taken for COVID-19.

## **Key Data**

27. Data on Early Years Providers in the City of London (see Appendix, Table 1).
28. Approximate number of children and young people aged 0–18 years resident in the City of London in 2020 (see Appendix, Table 2).
29. Numbers of children forecast to be resident in the City of London by 2025 (see Appendix, Table 2).

## **Corporate & Strategic Implications**

30. Financial implications – In the City, Early Years providers are mostly small businesses, with one voluntary organisation and maintained provision in the Aldgate Primary School and the City of London Children’s Centre. During the lockdown, all these providers continued to receive the Department for Education’s (DfE’s) early education grant, continuing with the reopening of the sector in June 2020, and the subsequent opening of the one maintained primary school in the City – Aldgate Primary School. This grant funding has been provided by the Education and Early Years Service.
31. The loss of income from fees, usually paid by parents, is a substantial aspect of the childcare business model. The risk implications are that, if the childcare business is not sustainable in the future, this could create a situation where there is insufficient childcare in the City local area, and this would need to be addressed. The DfE also introduced a number of measures to support the Early Years sector, including loans.
32. Equalities implications – Take-up of childcare from lower-income families is essential to parents being able to work and access training. It is vital that the Childcare Accessibility Scheme supports those families where equalities implications are greatest. This includes those people protected by existing equality legislation, covering age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marriage and civil partnership, and pregnancy and maternity.

## **Conclusion**

33. The overall assessment of childcare in the City confirms that there are sufficient good-quality childcare places for children aged 0–4 years, including alignment to vacant places as of summer 2020. This situation will, however, require ongoing monitoring, including the changing developments associated with COVID-19.

## **Appendices**

- Appendix 1. – City of London: Childcare Sufficiency Assessment 2020

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**Appendix 1.**



City of London

Childcare Sufficiency Assessment 2020

# September 2020

Introduction

Methodology 2020 Childcare Sufficiency Assessment

1. Supply of childcare
2. Demand for Early Years and childcare
3. Childcare for children and young people with special educational needs and disabilities (SEND)
4. City of London Childcare Accessibility Scheme
5. City of London Family and Young People's Information Service
6. Emerging effects of COVID-19
7. Achievements since the 2018 Childcare Sufficiency Assessment (CSA)
8. Key findings and challenges in summer 2020
9. 2020 Childcare Sufficiency Assessment strategic recommendations

## Introduction

This Childcare Sufficiency Assessment (CSA) is an analysis of the supply and demand of childcare provision in the City of London and how well the childcare needs of local parents are being met. It measures the effectiveness of the City's childcare market by identifying any supply–demand gaps, and makes recommendations as to how the City of London should plan to address them in the forthcoming planning period. Statutory guidance for local authorities (June 2018) outlines the requirements for English local authorities aligned to their duties pursuant to section 2 of the Childcare Act 2016 and sections 6, 7, 7A, 9A, 12 and 13 of the Childcare Act 2006.

This 2020 City of London CSA outlines how the City is meeting its duty to secure sufficient childcare, and highlights the requirements outlined in the guidance.

The 2020 CSA also analyses the evolving effects of the 2020 COVID-19 outbreak on the City of London's Childcare and Early Years market, and reports on factors including: (a) take-up and awareness of the City of London Childcare Accessibility Scheme; and (b) the awareness of the City of London Family and Young People's Information Service.

In terms of the COVID-19 outbreak, the primary aims of the research were to determine:

- the impact of COVID-19 on the ongoing sustainability of Early Years childcare provision
- what types of support the City of London's Early Years childcare sector would welcome, in terms of an ongoing revival and recovery from the imposition of the national lockdown
- the ongoing challenges caused by COVID-19
- the extent to which Early Years (0–5 years) childcare providers and settings had benefitted from the Government's financial support measures that were made accessible to businesses, starting from April 2020.

## Methodology 2020 Childcare Sufficiency (CSA) Assessment

As with the 2018 City of London CSA, an approach combining qualitative and quantitative methods was undertaken to provide a robust and in-depth analysis of the emerging gaps and themes – including those aligned to COVID-19. This approach was based on the premise that each family is unique and potentially in search of formal childcare to meet their needs, values, cultural requirements and personal circumstances.

The 2020 CSA methodology was a combination of the following:

- Desktop research exercise – collating secondary sources of data, from Ofsted, Office for National Statistics and the Greater London Authority (GLA) to analyse childcare supply in the City of London
- Structured interviews with Early Years (0–5) childcare providers/settings situated in the City of London
- Quantitative and qualitative consultation with parents and carers resident in the City of London, or within its *immediate* bordering area
- Qualitative consultation with young people – including young people with special educational needs and disabilities (SEND) – who are resident within the City of London, including via the City of London Youth Forum
- Analysis of emerging gaps, trends and key issues for providers and parents/carers – and recommended mitigating actions that could be taken to address such gaps.

## 1. Supply of childcare

- 1.1 The childcare providers located in the City that are registered by Ofsted to care for children in the Early Years pre-school (0–5) years group are subject to the legal provisions for the regulation and inspection of provision for children.
- 1.2 The 2020 CSA fieldwork confirmed that several City of London resident families do not use registered childcare; they continue (as with the 2018 CSA) to either provide childcare themselves, through their families, or they employ nannies with a relative high frequency, in comparison to other London Boroughs.
- 1.3 All of the Early Years (0–5) childcare providers/settings situated in the City of London local area are judged 'Outstanding or Good' by Ofsted – See Table 1 below.

**Table 1 – Early Years Childcare accessible in the City of London in 2020**

Setting name	Ofsted	Postcode	Type	Sector	Places
<b>Private, Voluntary and Independent places</b>					
Barbican Playgroup	Outstanding Jan 2020	EC2Y 8AX	Sessional pre-school	Private	20
City Child – Bright Horizons Nursery	Good April 2018	EC2Y 8AH	Day nursery	Private	54
Hatching Dragons Nursery	Good <sup>1</sup> May 2017	EC1Y 0AA	Day nursery	Private	34
Newpark Childcare Centre	Outstanding Feb 2020	EC2Y 8DU	Day nursery	Private	26
Smithfield House Nursery	Good July 2017	EC1Y 9HA	Day nursery	Private	100
The Children's Centre Nursery Goldman Sachs	Outstanding March 2013	EC4A 2BE	Workplace nursery	Private	19
<b>School-based nursery places</b>					
The Aldgate Primary School and City Child & Family Centre	Good July 2019	EC3A 3DE	Nursery class	Maintained	46
Charterhouse Square School nursery class	Independent School Inspectorate March 2019 School met standards	EC1M 6EA	Nursery class (8.30am – 3.30pm)	Independent school	52
St Paul's Cathedral School nursery class	Independent School Inspectorate May 2017 School met standards	EC4M 9AD	Nursery class (8.30am – 3.30pm)	Independent school	20
<b>Total places in summer 2020</b>					<b>371</b>

<sup>1</sup> Prior to 2019 premises move

- 1.4 In 2020 in the City of London, eight of the Early Years childcare providers/settings have places occupied by children accessing: (a) the free 2-year-old early education entitlement; and (b) the universal 15 hours free childcare during term time for 3- and 4-year olds. All responding Early Years childcare providers/settings were asked whether, prior to the COVID-19 outbreak, their setting was able to meet the demand it experiences for funded childcare: all stated “yes, we were”. All continued to be able to do so during the COVID-19 outbreak.
- 1.5 Five of the eight responding City of London-based Early Years childcare providers/settings were providing 30-hours free childcare offer places. Four stated that they had an average of six parents/carers based in the City who were paying for additional hours on top of their 30.
- 1.6 In summer 2020, only one Early Years childcare provider/setting stated that, during the forthcoming 12 months, they envisaged that they would *increase* the number of 30-hours childcare places that they would offer – and they stated that this would be a “marginal increase”. Three Early Years childcare providers/settings stated that, three years on from the (September 2017) inception of the 30-hours childcare offer, they believed that parents/carers would still benefit from more information about the programme, most frequently aligned to the eligibility criteria.
- 1.7 In summer 2020, all relevant parents/carers of 3- and/or 4-year-olds who responded to the CSA consultation confirmed that the 30-hours childcare offer had helped them and/or a partner to remain in employment. All (100%) of such parents/carers who had accessed the 30-hours childcare offer stated that they had found it easy to organise a place, with no one stating that they had not found it easy, or that they had found it to some degree “*stressful*”.
- 1.8 In summer 2020, 18 parents eligible for free 30-hours childcare are taking up a place at the Aldgate Primary School nursery/City of London Child and Family Centre, compared to nine in 2018.
- 1.9 As of summer 2020, there were no childminders operating within the City of London, though there were a number operating in the immediate bordering borough areas, such as Tower Hamlets, Hackney, Camden and Islington.
- 1.10 The average hourly fee charged by City-based private, voluntary and independent Early Years childcare providers/settings was £10.13/hour – ranging from £8.73/hour to £14.00/hour.
- 1.11 Five of the eight responding Early Years childcare providers/settings confirmed that they had a waiting list for places in summer 2020. Two stated that waiting lists had moderately increased since the COVID-19 outbreak and the Government’s responses (that is, lockdown), came into force in spring 2020. Three settings stated that they did *not* have a waiting list in summer 2020, though they did have one before lockdown.
- 1.12 Six of the eight responding Early Years childcare providers/settings confirmed that they had vacant places in summer 2020 (five of which were private, voluntary and independent settings), with two such providers having 33 vacant places, and one reporting 36 vacant places – most frequently for 3- and 4-year-olds. The relevant responding Early Years childcare providers/settings aligned this incidence of a high number of vacant places to the COVID-19 outbreak.
- 1.13 When asked if they would still be able to provide childcare services for families in the

City for the next five years, all the responding Early Years childcare providers/settings confirmed that they hope to still be in business, and encouragingly none stated that they had any type of sustainability issue.

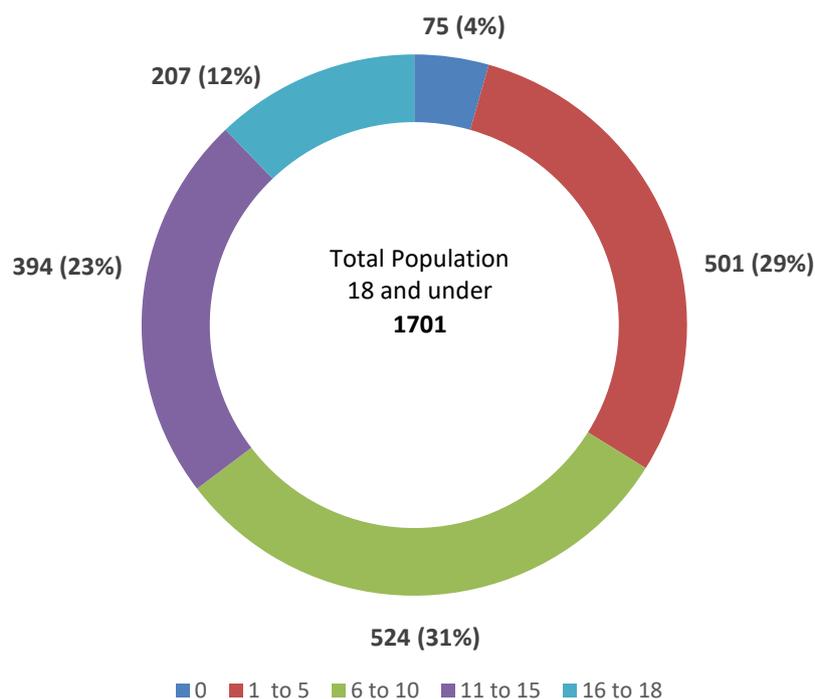
- 1.14 The Aldgate Primary School is the only *maintained* primary school in located *within* the City of London. It has an after-school club, breakfast club and holiday club, with 30 childcare places for school-aged children (5- to 11-years old) in the City. However, both Charterhouse Square School and St Paul's Cathedral School have activities for primary-aged children.

## 2. Demand for Early Years and childcare

- 2.1 The GLA's mid-year estimates for 2019 reported the City of London population at 9,721. The population has been growing, and is expected to continue to do so, with the biggest increase expected in the elderly population. Although there is relative affluence in the City of London, there are also pockets of deprivation located in the East (Portsocken locality) of the City, particularly within the environs of the Mansell Street housing estate and the Middlesex Street housing estate. The Office for National Statistics estimates that around 40% of the City of London population is from a Black, Asian and Minority Ethnic (BAME) group.
- 2.2 In terms of children and young people in the City of London, the birth rate remains fairly steady, and more than half the total young population are aged under 10. Image 1 shows the number of children estimated to be resident in the City of London as reported by the GLA: 17% of the total City of London population are aged 18 years and under. The majority of this group (64%), are aged under 10 years.

**Image 1 - Approximate number of children and young people aged 0–18 years resident in the City of London in 2020 (source: GLA 2020)**

City of London Population aged 18 and under



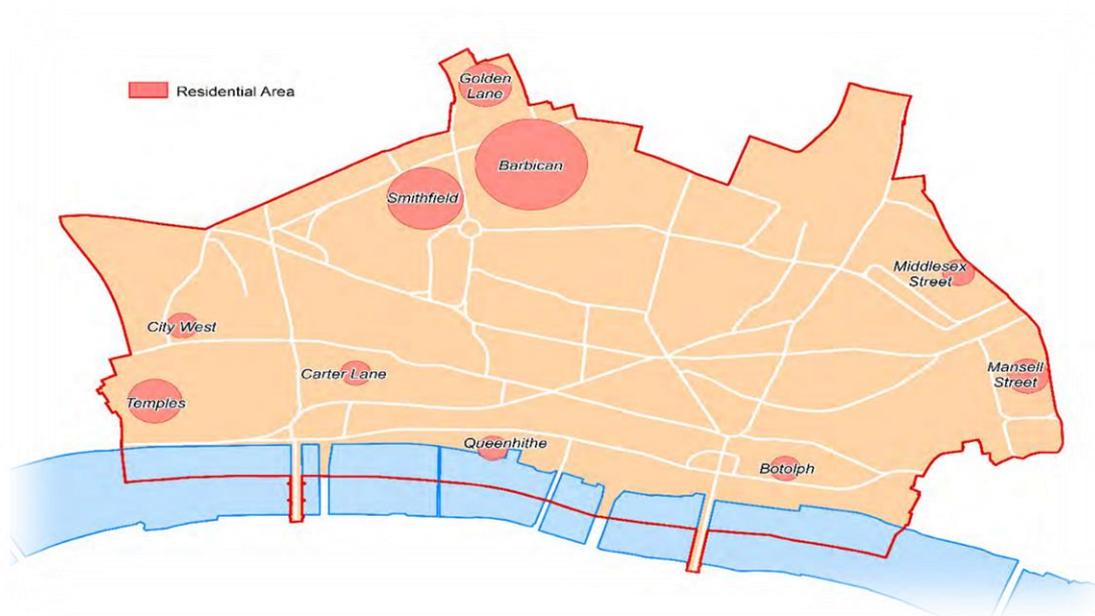
- 2.3 The main component in population change in the City of London in recent years is migration, rather than significant changes in birth or death rates. The number of new births in the City of London has stayed relatively constant in the recent years, at 50 to 52 per year. Housing-led population projections published by the GLA show that the City of London population is predicted to continue growing. Using 2018 figures as a baseline, the GLA forecast that, by 2030, the City of London population overall will have grown by around 9%. Table 2 indicates that the population of older school-aged children in the City of London is forecast to increase at a greater rate than the population of young (pre-school aged) children.

**Table 2 – Number of children forecast to be resident in the City of London by 2025 (source: GLA 2018)**

Age cohort	Resident population 2020	Resident population 2022	Number change 2020–2022	Resident population 2025	Number change 2020–2025
0–1 years	133	116	-17	113	-20
2 years	47	51	+4	49	+2
3–4 years	87	94	+7	89	+2
5–7 years	119	124	+5	130	+11
8–11 years	168	173	+5	173	+5
12–18 years	274	276	+2	288	+14
<b>Total 0–18</b>	<b>828</b>	<b>834</b>	<b>+6</b>	<b>842</b>	<b>+14</b>

2.4 The City of London Draft Local Plan 2036 sets out how the majority of the locality’s housing is concentrated around the edge of the City in four estates (the Barbican, Golden Lane, Middlesex Street and Mansell Street).

**Image 2 – Location of main housing areas in the City of London**



2.5 Other residential clusters are located in Smithfield, the Temples, parts of the riverside (Queenhithe), Fleet Street (City West), Carter Lane and around Botolph Lane. The highest concentration of residential units in the City, are in the Barbican and Golden Lane estates (39%) and Smithfield (principally Bart’s Square).

2.6 The current development at City of London Primary Academy Islington (COLPAI) will deliver 66 new housing units in 2022, and this is the only expected forthcoming

increase to residential dwellings numbers that *could* influence demand for Early Years childcare over forthcoming years. It is important to note within the context of this sufficiency assessment that, if the City's housing stock increases, the resident population does not automatically increase in proportion, as: (a) many residential units are used as second homes or for short-term letting (the 2011 Census indicated that there were 1,400 second homes in the City of London); (b) parents who have young children tend to move out of the City when the children reach school age; and (c) a number of parents send their children to independent schools.

- 2.7 Of parents and carers consulted for the summer 2020 CSA: 63% stated that they were using at least one type of formal childcare term-time or holiday time – that is, a day nursery, a pre-school, a (non-City based) childminder or an out-of-school club; 37% stated that they were (in summer 2020) only using informal childcare – that is, themselves and/or a partner (where relevant), a friend/neighbour or a nanny/au-pair. The most frequent type of formal childcare being accessed by a City of London-resident parent/carer was a private, voluntary or independent sector nursery, followed in frequency by a nursery class in a state school. In terms of informal childcare, 15% of parents were receiving support through grandparents, and 10% were hiring a nanny.
- 2.8 City of London Early Years childcare providers/settings were invited to state whether, since 2018, they had witnessed any notable (new) trends in terms of the demand for: (a) types of places that you offer; or (b) types of hours at your setting? Five stated that they had, with the most frequent (stated by three settings) being a request for earlier opening times.
- 2.9 City of London Early Years childcare providers/settings were invited to state how much higher or lower they expected demand for their places to be in summer 2022: three stated: “*higher than now, but not significantly*”, four stated: “*about the same*” and; one stated: “*I can't say*”.
- 2.10 Some City of London resident parents/carers evidently chose not to use formal childcare because they *prefer* to look after their children themselves. This was confirmed by 20% of relevant parents/carers who responded to the summer 2020 CSA consultation.
- 2.11 Parents/carers were requested to state whether they had ever experienced any barriers when trying to access childcare: 59% stated that they had, with the three most frequent barriers being (in order of frequency): 1. I have recently had concerns about COVID-19 safety and/or transmission (27% of all responding parents/carers); 2. I could not afford the childcare that I require (21%) and; 3. I could not/cannot find a space at my chosen provider (15%). Of the responding parents/carers, 21% stated that they do not use formal childcare as it is too expensive, compared to 39% who made such a statement in 2018. Indeed, the average weekly term-time amount spent by a fee-paying parent/carer consulted for the 2020 CSA was £390.00.
- 2.12 Parents/carers generally reported that their use of formal childcare had decreased since the COVID-19 lockdown in late March 2020, in large part due to the fact that there was an increased incidence of working from home.
- 2.13 All parents/carers, whether they were using formal or informal childcare in summer 2020, were invited to state whether there was any type of formal City of London-based childcare that they would like to access in the *near future* (which they were not accessing in summer 2020). The most frequent type of formal childcare stated was a holiday play scheme (by 28% of all parents/carers), followed in frequency by a pre-

school/playgroup (23%) and then an after-school club (19%).

- 2.14 Parents/carers who were not using any formal childcare in summer 2020 were invited to state what they would be looking for if they were to consider doing so in the future. The three most frequent responses were (in order of frequency): 1. for it to be good quality; 2. for there to be reassurances about COVID-19 safety measures; and 3. for it to be located close to my home.
- 2.15 Parents/carers who were accessing formal childcare were, on average, accessing it for 30.5 hours per week. The most frequent number stated was 40 hours weekly.
- 2.16 Young people who are resident in the City of London explained to the 2020 CSA research team that they were accessing a range of out-of-school activities and clubs. These included pre-lockdown (late March 2020) City of London Child and Family Centre out-of-school play scheme and homework club. The most frequent sporting activity that they were accessing was swimming (at Golden Lane Leisure Centre).
- Two activities/clubs that young people who were consulted *repeatedly* outlined they would like to use if they were accessible to them were: (a) a City of London cycling club; and (b) an ongoing Arts club.
  - It was also observed that a number of parents/carers of children and young people with SEND advocated an increased use of local green spaces, including through the facilitation of outdoors sensory sessions. Another suggestion was a “wildlife” garden area that could be tended by the families of young people with SEND.
- 2.17 A number of young people with SEND were asked what they would like to access in terms of future out-of-school activities, or what could be termed, ‘*during childcare*’. Three *repeated* requests were for the establishment of: 1. a green space and/or garden that young people with SEND could tend to, be responsible for and use as a meeting place; 2. an Arts club, for young people with SEND; 3. a ‘Bikes for SEND’ club for young people with SEND.

### 3. Childcare for children and young people with special educational needs and disabilities (SEND)

- 3.1 As with the 2018 CSA, families with children and young people with SEND use a range of short breaks services to access support during the day, weekends and during the school holidays.  
At July 2020, there were 18 City of London children and young people with an Education, Health and Care Plan (EHCP). Of these, eight were aged under 10 years, seven were aged 11–15 years, and three were aged 16–19 years.
- 3.2 Collectively, the summer 2020 CSA demonstrates that a total of nine children with SEND were accessing a City of London-based Early Years childcare setting. Eight of these children were accessing a place at City of London Child and Family Centre, where the most frequent age was 3-years and the most common special needs type was a speech, language or communication difficulty.
- 3.3 Responding City of London-based Early Years childcare providers/settings were invited to confirm how often they were asked by a carer/parent if they could care for a child who has SEND. The most frequent response was ‘rarely’ with none saying that in the past 12 months they had had to decline to take a child with SEND due to being unable to most effectively care for their needs.
- 3.4 Of all responding parents/carers to the 2020 CSA research, 19% stated that they had at least one child in their family with SEND. The most frequent type of special needs outlined by a relevant City of London resident carer/parent was a speech, language or communication difficulty, or an autism spectrum disorder. Of the children and young people with SEND, 40% were evidently accessing a type of formal childcare, most frequently a form of out-of-school childcare for 5- to 14-year-olds.
- 3.5 A series of focused video conference interviews with six City of London resident carers of children and young people with SEND demonstrated that:
- they felt very well supported by the City of London officers and family support workers, and placed a lot of “*trust*” in their guidance and policies
  - there was a sense that the City of London welcomed *meaningful* co-production
  - there was tangible support for more interaction (to be enabled) between carers who live in the Portsoken locality of the City and their co-City of London residents/carers who live in the Northern locality of the City – in particular, the Barbican estate
  - the City of London libraries were held in high regard, especially through their efforts to facilitate stimulating arts-themed activities.

## 4. City of London Childcare Accessibility Scheme

- 4.1 The City of London Childcare Accessibility Scheme aims to support resident families to access early education and childcare through an early education place. The purpose of the early education place is to support the child's early development and empower parents to make positive changes to their lives through work, training or family support – see Image 2 below.

Image 2 - City of London's Childcare Accessibility Scheme explained

**CHILDCARE ACCESSIBILITY SCHEME**

**DO YOU QUALIFY FOR FINANCIAL SUPPORT WITH CHILDCARE COSTS UNDER THE CHILDCARE ACCESSIBILITY SCHEME (CAS)?**

Your family needs to meet one of these two criteria:

**CRITERIA ONE**  
Children with Additional Needs but not qualifying for Education Health and Care Plan (EHCP)

This section of the funding is aimed at a child who is already attending or due to attend an early years setting or a child who has been identified by the children's centre or other professionals as potentially benefiting from an early education place.

The CAS will support the child by providing funding for an education place or additional childcare hours to ensure that they have the best start in life.

The City of London Childcare Accessibility Scheme aims to support resident families to access early education and childcare. The purpose of the early education place is to support the child's early development and empower parents to make positive changes to their lives through work, training or family support.

**CRITERIA TWO**  
Families who have a combined income of less than £55K

This funding is aimed at parents who have a joint combined income of less than £55K per annum. This fund is also open to:

- students, trainees and apprentices
- parents on maternity/paternity leave
- parents returning to work
- parent/s with more than two children needing childcare

This section of funding will provide top up funding to ensure that families receive help with paying up to a maximum of 70% of their childcare costs.

**CONTACT THE EDUCATION & EARLY YEARS TEAM:**

TELEPHONE: 020 7332 1002  
EMAIL: [EEYServices@cityoflondon.gov.uk](mailto:EEYServices@cityoflondon.gov.uk)

The following early years settings are currently part of the scheme. However we are willing to consider applications from other local settings.

**Cox Child and Family Centre**  
31 James's Passage, Duke's Place  
EC3A 5DE  
020 7283 1147 | [office@cojnc.co.uk](mailto:office@cojnc.co.uk)  
[www.cojnc.co.uk](http://www.cojnc.co.uk)

**Watchdog Dragons Nursery**  
Ironmonger's Hall, 31 of Leabury Place, 67 Aldersgate Street, Bosticon  
EC2Y 8AN  
020 3912 2950 | [enquiries@watchdog-dragons.com](mailto:enquiries@watchdog-dragons.com)  
[www.watchdog-dragons.com](http://www.watchdog-dragons.com)

**Newpark Childcare**  
1 St Giles Terrace  
EC2Y 8DU  
020 7638 5550 | [bosticon@newparkchildcare.co.uk](mailto:bosticon@newparkchildcare.co.uk)  
[www.newparkchildcare.co.uk](http://www.newparkchildcare.co.uk)

**Ironfield Nursery**  
14 West Ironfield  
EC1A 1HT  
020 7236 1080 | [office@ironfieldnursery.co.uk](mailto:office@ironfieldnursery.co.uk)  
[www.ironfieldnursery.co.uk](http://www.ironfieldnursery.co.uk)

**The Nursery of St Paul's**  
Dock Street  
E1 8JH  
020 7243 0096 | [stpaul@selectiveworks.com](mailto:stpaul@selectiveworks.com)  
[www.selectiveworks.com/the-nursery-of-st-pauls-london](http://www.selectiveworks.com/the-nursery-of-st-pauls-london)

- 4.2 Approximately 15% of parents/carers who were consulted for the 2020 CSA stated that they were aware of the existence of the City of London's Childcare Accessibility Scheme (most frequently via City of London Child and Family Centre). Half of these respondents stated that they did not qualify. One of those parents stated:

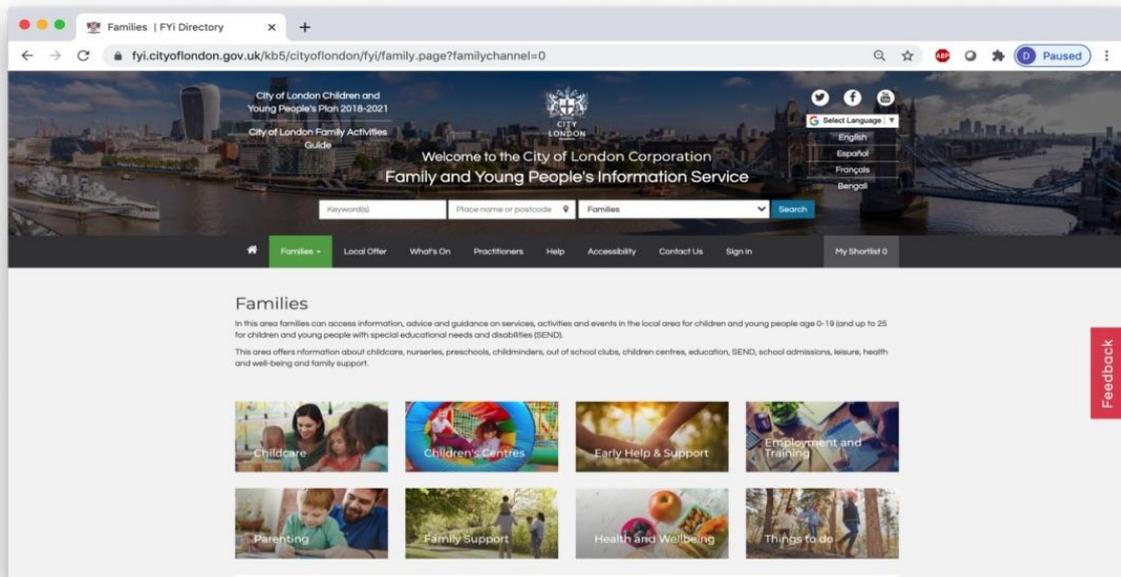
*"I went to City [of London] Child and Family Centre and was introduced to a support worker who told me about it. I have been using it since November 2019 and it has been a major help to my family."*

Relevant parents/carers had also found out about the City of London's Childcare Accessibility Scheme via *"the FYi website"* and *"my local library"*.

- 4.3 The majority of parents/carers who were not aware of the scheme requested further details about it and expressed their support for its ambitions and objectives.

## 5. City of London Family and Young People's Information Service

Image 3 – Summer 2020 home page of City of London Family and Young People's Information Service



- 5.1 Of parents/carers that were consulted for the 2020 CSA, 27% stated that they were aware of the existence of the City of London's Family and Young People's Information Service. Of those parents/carers who were aware of it, approximately half had used the service at some point, with the majority praising its navigability and design.
- 5.2 The three most frequent types of information that responding parents and carers stated they had searched for were:
1. information about childcare availability in the summer holidays
  2. information about activities that children and young people with SEND can take part in
  3. funded childcare.

## 6. Emerging effects of COVID-19

- 6.1 The most frequent effect of the 2020 COVID-19 outbreak highlighted by Early Years childcare providers/settings was (predictably) *“financial challenges”* or *“lost income”*.

Other repeated effects were: *“lost opportunities to meet new customers [parents]”* and then *“a loss of face-to-face contact with parents and children”*.

There were a number of examples of Early Years childcare providers/settings having plans to re-energise income generation as the emergence from lockdown progressed, including:

*“Raising fees in September 2020”*.

*“Maybe filming ‘show rounds’ and then having a video chat with interested parents, involving a likely key worker”*.

*“Making better use of social media and virtual tours to generate interest and demand”*.

- 6.2 Three responding Early Years childcare providers stated that members of their workforce had expressed concerns about returning to the setting, including concerns about: *“what to do if they [as a staff member] felt unwell”* and (in the case of each of the three providers) concerns about travelling on public transport with the attendant risk of catching COVID-19.

Each representative of a responding Early Years childcare provider/setting was also invited to classify how their parents/families were feeling in terms of their children coming back to the setting:

- Six stated: the majority seem to be in favour
- Two stated: it is a fairly even split between those in favour, and those with concerns.

- 6.3 Three repeated ‘most important or urgent’ types of COVID-19-related support that responding Early Years childcare providers stated that they would continue to welcome from the City of London were (in order of frequency):

1. help with advertising vacant places<sup>2</sup>
2. help with recruiting and/or replacing staff
3. maintaining the direct contact option with the City of London and the role of the COVID-19 themed video conference network meetings.

- 6.4 In terms of the Government’s financial support measures for UK businesses:

- no responding providers stated that they had accessed the Coronavirus Business Interruption Loan Scheme, mainly because of concerns about an ability to meet eventual repayments
- no providers had accessed a Coronavirus Bounce Back Loan Scheme
- six providers had accessed the Coronavirus Job Retention Scheme, and two stated that they had not. The relevant six providers each stated that the support had proved *“essential”*.

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<sup>2</sup> Scheduled to be part of a Provider’s Page on the City of London FYi in 2020.

None of the City of London-based responding Early Years childcare providers stated that their setting had taken advantage of an ability to defer payments to HMRC.

6.5 Parents and carers who were consulted in summer 2020 CSA were invited to state the extent to which they were feeling *at ease* with their children returning permanently to formal childcare provision, as the country/City emerged from lockdown and the outbreak of COVID-19:

- 50% of formal childcare users stated: “I do not have any worries or concerns – and am very happy for my children to go back”
- 10% “I am happy for my children to go back – but I do have some worry/concerns”
- 10% “I am worried and/or concerned – and will need significant reassurance”
- 15% “I am not ready to let my children go back, because I am significantly worried/concerned”
- 15% stated “Don’t know”.

6.6 Specific feedback included:

*“I suppose it is not knowing if my children will meet other children who might have contracted the infection. COVID-19 is still here... The nursery are doing as much as they can and obviously, we cannot expect any guarantees.”*

*“My concerns are: spread of infection... not being able to enter a nursery... the nursery closing at short notice.”*

*“I do have concerns about my child going to nursery, but it is really important that they go.”*

*“I think more could be done to enhance safety and signage around local schools to manage risks from increased numbers of cyclists and e-scooters that are [in my opinion] not careful or competent during pick-up and drop-off times...”*

6.7 Parents and carers were invited to state any actions/steps childcare providers/settings should (in their opinion) be taking to reassure parents/carers/children and make them feel *at ease* with going back to the setting. The three repeated responses were (in order of frequency):

1. Regular updates to parents/carers
2. Knowing that staff at day-care settings are being tested “regularly”<sup>3</sup>
3. Signage being adopted outside Early Years childcare venues and schools to remind parents and carers of good practice and personal responsibility during drop-off and pick-up times.

6.8 Interviews that took place by video conference with five parents who accessed City of London Child and Family Centre in summer 2020 demonstrated that mostly parents were happy with the childcare arrangements available to them as the COVID-19 lockdown eased, and they were planning on their children returning to the City of London Child and Family Centre or school in September. Once again, they did express some caution and nervousness in general, but wanted to ensure that their children had the opportunity to socialise and go to school for their ongoing development.

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<sup>3</sup> An eventuality that would not necessarily be within the immediate and practical ability of childcare providers, as this is not offered by the NHS, and private testing is (in summer 2020) relatively expensive to facilitate.

6.9 These parents were confident that the approaches being used by their childcare providers would be appropriate and meet all health and safety requirements. One parent whose child had used the City of London Child and Family Centre during the lockdown period noted that they had observed the arrangements to be of good quality and they were reassured by this.

## 7. Achievements since the 2018 Childcare Sufficiency Assessment (CSA)

The CSA should ideally catalyse positive change. The narrative below examines the extent to which the strategic recommendations that were made as an outcome of the 2018 City of London CSA have been realised. Feedback that has been received via the 2020 CSA has contributed to the analysis and explanations below.

### 7.1 2018 CSA recommendation:

The overall assessment of the sufficiency of childcare in the City of London confirms that there are sufficient childcare places for children in the Early Years, and for holiday and after-school childcare places. However, the assessment did identify some gaps in childcare provision, particularly for children with SEND.

Action taken:

In 2020, there is now a systematic and easy to navigate referral process for all Early Years childcare providers/settings to receive support if they have concerns about a child.

During 2019/20, the City of London Lead Early Years Advisor supported a number of settings and parents with successful transition to school for children with SEND.

### 7.2 2018 CSA recommendation:

City parents were satisfied with the overall quality of information that they can access regarding childcare. However, they wanted more information on childcare options in neighbouring authorities, especially for older children attending school.

Action taken:

The City of London Family and Young People's Information Service now has clear sections for 'Childcare within the City' and 'Childcare outside of the City'. There are also specific pages for after-school and holiday activities.

### 7.3 2018 CSA recommendation:

There is a need to raise the level of awareness of the varied and different forms of financial incentives available to parents using childcare. The City of London Family and Young People's Information Service should continue to promote the availability of the Local Offer to enable local families to make informed choices.

Action taken:

In 2020, the City of London Family and Young People's Information Service now has a distinct section for parents to access information regarding financial support for childcare. This includes links to external sources of information (for example, the Childcare Choice website).

The Childcare Accessibility Scheme has been reviewed and a new information leaflet is available online. This leaflet has also been shared with the Children's Centre services (including libraries), partners and Early Years settings.

#### 7.4 2018 CSA recommendation:

To improve accessibility for local families that have children with SEND in the City of London are considering the viability of expanding the capacity for providing short-break services in the local area – and the services available in special schools out of the area. The City of London may also explore how to increase their capacity to provide out-of-school childcare for City of London resident families that have children with SEND.

##### Action taken:

The City of London now have a short-breaks contract in place with the London Borough of Hackney, and a wider range of such options for varying needs. This is not specifically linked to special schools, but the short-breaks providers are able to provide childcare and after-school provision to City of London resident families.

#### 7.5 2018 CSA recommendation:

The City of London could continue to work and collaborate with the local childcare providers to support the expansion and extension of their service provision to meet the needs of local parents.

##### Action taken:

The City of London continues to support Early Years childcare providers/settings with their physical expansion, where possible and viable. For example, in 2019 a City of London-based private nursery was supported when that enterprise moved to larger premises. This included structured visits from City of London officers to offer support with developing the learning environment, as well as staff training.

#### 7.6 2018 CSA recommendation:

The City of London should consider the possibility of developing childminding services to provide flexible childcare during atypical hours for working families in the future.

##### Action taken:

Since 2018 the City of London has received one query regarding childminding services within the locality. The 2020 CSA also demonstrates that there is not an unmet need for childminding places. However, the demand for such formal childcare provision is continually monitored, including to be aligned to the 2020 COVID-19 pandemic.

#### 7.7 2018 CSA recommendation:

The City of London will continue to offer training events and access to Early Years activities for all local Early Years providers in the City.

##### Action taken:

In 2020, all City of London-based Early Years childcare providers/settings are invited to a termly providers forum where they receive up-to-date information and are able to share elements of good practice, as well as discuss any concerns they may have. These meetings were increased to twice monthly during summer 2020 as an outcome of the COVID-19 outbreak. The Lead Early Years Advisor is in regular contact with all settings. Training is delivered according to each setting's needs. This includes the new Level 3 Special Educational Needs Co-ordinator (SENCO) qualification, First Aid, Makaton language programme assessment, observation and planning training.

Safeguarding training is regularly offered through the City & Hackney Safeguarding Children Partnership.

7.8 2018 CSA recommendation:

The City of London should consider how it might support the registration of nannies who want to register on the Ofsted voluntary registration scheme.

Action taken:

A page has been created on the City of London Family and Young People's Information Service website to support and inform anyone wanting to open a childcare business and/or register with Ofsted. This includes a section for registering as a nanny.

7.9 2018 CSA recommendation:

The provision of good-quality childcare is central to the core offer of Children's Centre Services.

Action taken:

The Children's Services Manager attends each providers' forum and has ongoing contact with local Early Years childcare settings/providers. In February 2020, this officer introduced the role of the Family Outreach Worker to the City of London settings and explained how they could refer families for further structured support.

## 8. Key findings and challenges in summer 2020

### 8.1 Theme: Sustainability

Three of the eight City of London-based Early Years childcare providers/settings outlined that they had a significant number of childcare vacancies in summer 2020. These vacant places were across all age groups 0–4 years, though tended to be highest for 3- and 4-year-olds.

Representatives of relevant settings reported that the incidence of vacant places had increased, aligned to the progression of the COVID-19 outbreak.

### 8.2 Theme: Type/Age

As is common with other inner-London boroughs, the population of older school-aged children in the City of London is forecast to increase in forthcoming years, at a greater rate than the population of young (pre-school aged) children.

The City of London therefore should retain a strategic awareness that demand for out-of-school childcare provision – that is, after-school club provision, before-school provision and holiday-time provision – might become more pronounced. Indeed, when parents/carers were invited to state what types of formal childcare they intend to use in future years, the second and third most frequent types were: an out-of-school play scheme (20% of all responding parents and carers) and an after-school club (18%).

### 8.3 Theme: Sustainability

Each of the City of London-based Early Years childcare providers/settings expressed concerns (to differing degrees) about the *possibility* of a second 2020 COVID-19 lockdown – possibly during winter 2020/21. Their concern was aligned to their ongoing sustainability and (in certain cases), due to their 2020 experience of an increase in vacant places and loss of income from fees.

In the event of a second lockdown, respondents have proposed that a type of Coronavirus Job Retention Scheme would ideally need to be instigated or extended. The City of London therefore needs to retain its awareness of this concern and continue its ongoing dialogue with its settings.

### 8.4 Theme: Sustainability

Three of the eight City of London-based Early Years childcare providers/settings outlined that there had been instances of members of their workforce expressing concerns about travelling to the workplace (that is, the nursery) during the ongoing COVID-19 outbreak. This was not seen as overt retention issue; however, the City of London should have an awareness of its incidence.

### 8.5 Theme: Special needs

Almost one-quarter of parents/carers consulted for the 2020 City of London CSA outlined that they had a child with SEND, or they had a young child with (as yet) undiagnosed needs.

It is typical within all inner-London boroughs for the incidence of children with SEND to be increasing.

A repeated request made by the City of London-based Early Years childcare providers/settings was for more training to support their staff being able to identify special and additional needs at an early age. Such training has indeed been consistently offered to them by the City of London. A skills and training audit will be undertaken in Early Years settings in autumn 2020. At this time, accessibility to such training can be reiterated by the City of London.

#### 8.6 **Theme: Special needs**

A number of young people with SEND outlined during the 2020 CSA that they would welcome out-of-school activities that were more aligned to the theme of 'play' as well as those that are aligned to 'learning'. Three *repeated* requests were for the establishment of:

- a green space and/or garden that young people with SEND could tend to, be responsible for and use as a meeting place
- Arts club, for young people with SEND
- A 'Bikes for SEND' club.

#### 8.7 **Theme: Sustainability**

Parents/carers were requested to state whether they had ever experienced any barriers when trying to access childcare in the City of London locality: 36% stated that they had, with the most frequent barrier being: "*I have recently had concerns about COVID-19*" – stated by a third of all responding parents. This percentage could indicate that certain parents – that is, customers of childcare providers – may be reluctant about returning to provisions as the 2020/21 period continues.

#### 8.8 **Theme: Sustainability**

It was evident via analysis of the 2020 CSA parents/carers survey that COVID-19 concerns were most frequently aligned to "*a nursery*", a term that constitutes the majority of formal childcare located in the City of London.

#### 8.9 **Theme: Type/Age**

All parents/carers – whether they were using formal or informal childcare in summer 2020 – were invited to state whether there was any type of formal City of London-based childcare they would like to access in the *near future* (which they were not accessing in summer 2020).

A relatively high percentage stated: pre-school/playgroup. These parents tended to be Barbican residents, and this therefore highlighted the relative importance of the ongoing sustainability of the Barbican Playgroup.

#### 8.10 **Theme: Affordability**

The second most frequent 'barrier' to accessing formal childcare stated by a parent who participated in the 2020 CSA was: "I could not afford the childcare that I require." Encouragingly however, 21% of the respondents stated that they do not use formal childcare as it is too expensive – this is compared to 39% who made such a

statement in 2018.

However, only 20% of parents/carers consulted for the 2020 CSA stated that they were aware of the existence of the City of London's Childcare Accessibility Scheme (most frequently via City of London Child and Family Centre), and half of these respondents stated that they did not qualify.

## 9. 2020 Childcare Sufficiency Assessment (CSA) strategic recommendations

The overall assessment of childcare in the City confirms that there is sufficient good-quality childcare places for children aged 0-4 years, including alignment with the incidence of vacant places as of summer 2020. This situation will, however, require ongoing monitoring, including with regard to the changing developments associated with the COVID-19 outbreak. Additionally, sufficiency of places for will also particularly require systematic monitoring (see recommendation D below).

The 2020 CSA has identified some challenges that should be considered, aligned to the following strategic recommendations:

- A) The City of London should consider how it can continue to demonstrate to its Early Years childcare providers/settings that it will help them to fill vacant places, including to support the private, voluntary and independent (business) sector's morale.
- B) The 2020 City of London CSA has highlighted a possible forthcoming sustainability concern for the locality's private, voluntary and independent nurseries, including alignment with: (a) parental concerns about COVID-19; and (b) depleted occupancy levels post the 2020 outbreak. The relevant City of London officers need to ensure that the risk of closures is mitigated and that the issue is monitored and viewed through a prism of a possible requirement for traditional commercial (and fundamental) business support for small enterprises.
- C) Approximately one-third of parents and carers who provided feedback for the 2020 City of London CSA outlined that they had (to varying extents) concerns about COVID-19, which reached a level where they were worried about their children attending a day-care setting. The City of London may want to consider means via which it can practically help to re-energise and rejuvenate local parental demand for formal Early Years childcare provision, aligned to evidence that certain parents have 'anxieties' around their children safely returning to or starting at a setting, because of COVID-19.
- D) Feedback from certain parents and carers who were consulted for the 2020 City of London CSA emphasised that there is a discernible demand for more out-of-school childcare provision for children resident in the North of the City (the Barbican and Golden Lane estates), including for children and young people with SEND. In recognition of this feedback, and the fact that the population of older children resident in the City of London is forecast to increase, the City of London should consider how it can support the establishment of a further out-of-school (childcare) resource, potentially within the Barbican locality.
- E) Relevant City of London officers need to continue their work to support Early Years childcare providers/settings with their recruitment and retention of qualified staff – including alignment to the 2020 City of London CSA report finding that there were incidences of provider workforce members having COVID-19 concerns, particularly about travelling safely to work.
- F) The City of London Education and Early Years Service should consider further partnership work with local stakeholders such as the Museum of London and the Barbican Centre. Young people with SEND, along with their carers, repeatedly expressed a wish for the possible establishment of: a green space and/or garden that young people with SEND could tend to, be responsible for, and use as a meeting

place; an Arts club; and a 'Bikes for SEND' club.

- G) The City of London should retain an awareness that a number of parents and carers who responded to the consultation for the 2020 City of London CSA wanted the future option of "access a sessional pre-school/playgroup", and so should monitor the (currently secure) availability of such sessional provision.
- H) The 2020 City of London CSA has provided some positive feedback with regard to the issue of affordability, with fewer parents/carers than in 2018 stating that an inability to afford formal childcare was an issue for them. However, although the Childcare Accessibility Scheme was well received by parents/carers who were aware of its existence, (including those who were benefitting from it), a wider and increased awareness of the scheme's existence still ideally needs to be achieved, including in the Portsoken locality.
- I) The City of London should consider how it can further support its Early Years childcare providers/settings to produce virtual online tours of their building and resources, which can be appropriately accessed and viewed by prospective parents/customers, and can display the preventative and safety measures that are being taken for COVID-19.