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| <b>Committee:</b>  | <b>Dated:</b>  |
| Community and Children’s Services Committee  | <b>3<sup>rd</sup> November 2022</b>  |
| <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>  | <ul style="list-style-type: none"> <li>• <b>Contributing to a flourishing society</b></li> <li>• <b>Support a thriving economy</b></li> <li>• <b>Shape understanding environments</b></li> </ul> |
| <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 authors:</b><br>Isabelle Denniee, Lead Early Years Advisor – Education and Early Years<br>Theresa Shortland, Head of Service – Education and Early Years |  |

### **Summary**

- This Childcare Sufficiency Report is an analysis of the supply and demand of childcare provision in the City of London. 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 any gaps in the market in the forthcoming planning period.
- The 2022 Childcare Sufficiency Report also updates on the recovery of the Early Years sector, following the COVID-19 pandemic.

### **Recommendation**

Members are asked to:

- Note the report.

### **Main Report**

#### **Background**

1. 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 2022 City of Childcare London Sufficiency Report outlines how the City is meeting its duty to secure sufficient childcare.
2. The previous Sufficiency Report in November 2020 highlighted a number of themes:

- A. Type of childcare and sustainability: A relatively high percentage of parents stated that they would like their child to attend a “pre-school/playgroup”. These parents tended to be Barbican residents, and this highlighted the relative importance of the ongoing sustainability of the Barbican Playgroup. At the same time, some settings reported that they had a significant number of childcare vacancies. These vacant places were across all age groups 0–4 years. Occupancy levels for the autumn term 2021 were still below pre-COVID-19 averages and challenging for some Early Years childcare providers. All City of London Early Years settings survived the financial hardship of the pandemic with the support of zero-rated business rates and ongoing access to the Department for Education (DfE) Nursery Grant Funding, managed by the Education and Early Years Team.
- B. When parents/carers were invited to state what types of formal childcare they intended to use in future years, the second and third most frequent types were: a holiday play scheme; and an after-school club. As well as the out-of-school club based at the Aldgate School, Society Links has been commissioned by the City of London to provide activities for young people aged 8–19 years living in the City of London, in the Portsoken and Golden Lane Community Centres.
- C. One of the most frequent ‘barriers’ to accessing formal childcare stated by parents who participated in the 2020 childcare sufficiency audit was that they could not afford the childcare that they required: 21% of the respondents stated that they did not use formal childcare as it was too expensive; this compared to 39% in the 2018 childcare sufficiency audit. Information about the Childcare Accessibility Scheme is shared with all local Early Years providers to ensure that the scheme is promoted as widely as possible.
- D. Almost one-quarter of parents/carers consulted for the 2020 City of London Sufficiency Report outlined that they had a child with special needs and/or disabilities, or they had a young child with undiagnosed needs. A repeated request made by the City-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. During the academic year 2021–2022, a training programme was offered by the Education and Early Years Team to upskill Early Years providers. This included the Early Years Special Educational Needs Co-ordinator (SENCO) qualification, the City of London Talks and Listens Enthusiastically (COLTALE) Programme, Attention Autism, Behaviour for Learning, Makaton and an introduction to working with children with Attention Deficit Hyperactivity Disorder (ADHD).

### **Current Position**

- 3. The City of London Education and Early Years’ Service continues to ensure that every child living or educated in the City of London has the opportunity to achieve their maximum potential and thrive in their unique community. Between January and July 2022, parents and childcare providers were interviewed, either face-to-face or via channels including its Family Information Service, the Barbican parent’s WhatsApp group, The Aldgate School’s and local Facebook pages.

4. The Sufficiency Report 2022 indicates that occupancy levels for the first part of the year have been returning to the levels that were observed pre-pandemic. The City of London's Early Years private sector childcare providers are experiencing an uplift in the buoyancy of the market and take-up of places, with some also re-establishing their waiting lists. There is a particular increase in the take-up of places for children aged under 2 years.
5. Even though there has been an increase in the number of City workers returning to offices in the City, the local parents' survey showed that 25% of responding parents were still working from home for at least part of the week. Consequently, some parents are continuing to seek flexibility around when they accessed a nursery place for their child.
6. A total of 19% of families stated that they were accessing formal childcare only, which is the same as the percentage of parents accessing informal childcare; and 52% of responding parents/carers stated that they were accessing a combination of formal and informal childcare. The three types of formal (registered) childcare being accessed by City of London parents with the highest frequency in spring 2022 were (in order of frequency):
  - i. After-school Club
  - ii. Day nursery
  - iii. Breakfast Club

It can be noted that 10% of responding parents/carers stated that the out-of-school childcare that they were accessing was located outside of the City of London – most frequently in the London Borough of Islington, followed by the London Borough of Hackney. This provision is mostly offered within the schools attended by these children in neighbouring boroughs.

7. The City of London Childcare Accessibility Scheme aims to offer financial support for 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. However, only 9% of parents surveyed said they were aware of the scheme.
8. Of the responding parents/carers, 14% stated that they had at least one child aged 0–18 years in their family who had Special Educational Needs and Disability (SEND) – with the most frequent type of SEND being speech language and communication needs, followed in frequency by autism spectrum conditions. Similarly, City of London childcare providers continue to highlight their collective observation of an increased number of pre-school children showing speech, language and communication needs. Aligned to this, the number of parents/carers having an awareness of the City of London's Speech and Language programme, COLTALE, remains relatively low (15%).
9. During the summer 2022, the Early Years Advisors worked closely with community libraries to promote the COLTALE programme, including taking part in the Summer Reading Challenge Family Fun Day. A new set of COLTALE stories written by local

children and families has been collated and a book will be published in autumn 2022 to further promote families “talking together, learning together”.

10. The majority of the Early Years childcare providers stated that, in summer 2022, recruitment and retention continues to be a challenge for them. Managers commented on staff turnover with recruitment simultaneously proving difficult. Retention of staff was an issue that was previously aligned to the relatively low pay in the Early Years and Childcare sector. A number of recent examples of professionals leaving to work in better paid occupations have been cited by City of London nursery managers and proprietors. Another theme has been that a number of staff members who were from other Eastern and Western European countries opted to return to their country of origin post-Brexit.
11. Early Years providers and parents/carers showed a keen interest in broadening the City Children Centre Services across the City local area to deliver the ‘hub & spoke’ model – in particular, services such as drop-in family activities and access to speech and language therapy.

### **Next Steps**

12. The overall childcare assessment confirms that there are sufficient good-quality childcare places for children aged 0–4 years in the City, as of summer 2022. This assessment has, however, also identified next steps that are outlined below:
  - a) Type of childcare and sustainability: The City of London should continue the systematic monitoring of occupancy levels in the sector – taking into account the incidence of City workers continuing to work from home on a part-time basis, therefore, seeking flexible childcare hours.
  - b) Recruitment of good quality staff is a national challenge: The City of London should continue to advise managers in local Early Years settings on the issues of recruitment and retention through promotion of national campaigns such as PACEY’s #ChangedALife campaign. Recruitment and retention issues continue to be discussed at the pan-London Heads of Early Years Meetings (attended by the City Lead Early Years Advisor) and the subject is being consistently monitored by the DfE.
  - c) After-school and holiday provision: The City of London should continue to monitor take-up of after-school and holiday provision at The Aldgate School playcentre and ensure that the Youth Service offer provided by Shared Lives responds to the needs of local families.
  - d) Affordability: The City of London should continue to promote the Childcare Accessibility Scheme, particularly in the context of the current cost-of-living crisis, to ensure that families who need it most are able to access childcare places.
  - e) Speech and Language needs: In summer 2022, the City of London re-energised the promotion of the COLTALE programme – and its role should be systematically disseminated through all education, children’s centre, social and

health-themed partners, to ensure that parents, carers and professionals have an enhanced awareness of what the programme offers.

- f) Children's Centre Services: The City of London should now intensify its exploratory conversations with relevant Early Years providers and partners to broaden the reach of the City Children's Centre Services to deliver a hub-and-spoke model which will include provision of drop-in services in the North and West of the City of London.

### **Key Data**

- 13. See Sufficiency Report – Appendix 1
- 14. New birth data June 2021–May 2022: 65 live births (no still births). This is slightly higher than the usual 50–52 annual birth data and takes into account the Afghan refugees who arrived in the City on 6 September 2021.

### **Corporate & Strategic Implications**

- 15. Financial implications – In the City, Early Years providers are mostly small businesses, with one voluntary organisation and maintained provision in the Aldgate School and the City of London Children's Centre. All Ofsted registered Early Years providers continue to receive the DfE's Early Education grant that is administered by the Early Years service.
- 16. Resource implications – Difficulties with retention and recruitment are a current national issue for the childcare market. The implications for the Early Years providers is staff sufficiency. The impact of staff shortages is that a reduced number of childcare places are available to families. The DfE is aware of this and is putting in place training support for staff to gain qualifications.
- 17. 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.
- 18. Legal implications - N/A
- 19. Risk implications - N/A
- 20. Climate implications - N/A
- 21. Security implications - N/A

## **Conclusion**

22. The overall assessment of childcare in the City confirms that there are sufficient good-quality childcare places for children aged 0–4 years. This situation will, however, require ongoing monitoring, including the changing developments associated with the current cost-of-living crisis.

## **Appendices**

- **Appendix 1** – City of London: *Childcare Sufficiency Assessment Service: July 2022 Update*

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City of London

# **Childcare Sufficiency Assessment Service: July 2022 Update**

## Contents

|  |       | <b>Pages</b> |
|--|-------|--------------|
| Key Conclusions  | 3 – 4 |              |
| Introduction   |       | 5            |
| Childcare Sufficiency Assessment<br>Research Methodology January – June 2022 |       | 5            |
| 1. Key Updated Demographic Context   |       | 6 – 7        |
| 2. Feedback from City of London<br>Early Years Childcare Providers           |       | 7 – 11       |
| 3. Feedback from City of London Online Survey<br>with Parents and Carers     |       | 11 – 17      |

## Key Conclusions

- A) **Conclusion:** It is evident that occupancy levels for the first part of 2022 have been returning to levels that were observed pre-pandemic, and that the City of London's private sector Early Years Childcare providers are experiencing an uplift in the buoyancy of their take-up and (in the majority of cases) their waiting lists. This has been accompanied by an increase of footfall within the City of London – however, it is evident that the incidence of working from home, including among workers that may have previously been customers at City of London Early Years Childcare settings/providers, is possibly maintaining a level which will affect occupancy on an ongoing basis.

**Action:** The City of London should continue its systematic monitoring of occupancy levels – with a focus on how its private sector providers are continuing to see a gradual return to pre-COVID levels.

- B) **Conclusion:** City of London childcare providers continue to highlight their (collective) observation of an increased number of pre-school (aged) children showing speech, language and communication needs – however, aligned to this, the number of parents/carers having an awareness of the City of London's programme remains relatively low.

**Action:** In summer 2022, the City of London has reenergised the promotion of the City of London Talks and Listens Enthusiastically (COLTALE) programme – and its role should be systematically disseminated through all education, social and health themed partners, so as to ensure that parents, carers and professionals have an enhanced awareness of its existence.

- C) **Conclusion:** The majority of the Early Years Childcare providers/setting stated that, in summer 2022, recruitment and retention had been an issue or challenge for them. This included the four private day nurseries that operate in the City of London. Retention was an issue that was aligned to the (relatively low) pay in the Early Years and Childcare sector, and a number of recent examples of professionals leaving to work in better-paid occupations were cited by City of London-based nursery managers and proprietors.

Another theme had been that a number of staff members who were from other (especially) Eastern and Western European countries had opted to return to their country of origin post-Brexit.

**Action:** This is a UK-wide challenge. The City of London should continue to signal to its Early Years and Childcare sector that it will advise them on issues of recruitment and retention, including through promotion of national campaigns such as PACEY's #ChangedALife campaign<sup>1</sup> and will help them as much as possible if individual staff members require advice or support.

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<sup>1</sup> See: <https://www.pacey.org.uk/news-and-views/pacey-media-centre/changedalife-campaign/>

It can also be noted that the recruitment and retention issue has been discussed at the pan-London Heads of Early Years Meetings and the subject is being consistently monitored and solutions are being considered by the Department for Education (DfE).

- D) **Conclusion:** There was discernible support among Early Years and Childcare providers and parents/carers for a broadening of the City Children Centre Services, for City residents, across the City local area to deliver the 'hub-and-spoke' model – in particular, services such as drop-in family activities and access to speech and language therapy.

**Action:** The City of London should now intensify its exploratory conversations with relevant private, voluntary, and independent sector partners to examine the viability of broadening the reach of the City Children's Centre Services to deliver a hub-and-spoke model (which has been under consideration since 2019) – which involves a firmer foundation and presence of the resource in the North and West of the City of London locality.

- E) **Conclusion:** The three types of formal (registered) childcare being accessed by City of London parents with the highest frequency in spring 2022 were (in order of frequency):

1. After-school Club
2. Day nursery
3. Breakfast Club

**Action:** The City of London should continue to have an awareness that an after-school club remains the most frequent type of childcare that local parents are evidently accessing, and: (a) continue to monitor take-up at The Aldgate School playcentre; and (b) continue to ensure that the youth service offer recognises this associated demand.

- F) **Conclusion:** A repeated type of feedback on the theme of occupancy reiterated by the City of London's Early Years Childcare sector, was that some parents were continuing to seek flexibility around when they accessed a nursery.

**Action:** The City of London, via its ongoing systematic monitoring of occupancy levels within its family of Early Years Childcare providers, will continue to attain intelligence on the supply/demand of types of places which parents are requesting and/or taking up, including weekdays where demand is peaking.

## Introduction

The City of London Education and Early Years Service continues to ensure that every child living or educated in the City of London has the opportunity to achieve their maximum potential and thrive in their unique community.

To this effect, and aligned to a context of the challenges that the COVID-19 pandemic inherently presented to the national and inner-City London Early Years and Childcare sector during 2020 and 2021: in autumn 2021, the City of London commissioned a two-year service whereby, up to mid-2023, the ongoing sufficiency of childcare provision in the locality would be monitored and subject to evolving strategic recommendations.

The service would, as relevant, on that ongoing basis:

- assess the existing childcare provision in the City of London, mapping supply and demand and gaps (as they evolved) in the childcare market – as well as monitoring any legacy impact of the COVID-19 pandemic
- review and summarise evolving demographic data, including child population projections by age group
- undertake periodic surveys and interviews of local parents and carers
- monitor prevailing vacancies/occupancy being experienced by the City of London’s childcare providers
- assess the ongoing awareness of the City of London Accessibility Scheme
- monitor the impact of the City of London Family Information Service regarding access to and sharing of relevant Early Years and Childcare themed information
- monitor the ongoing reach, accessibility and use of the City of London COLTALE programme by local families.

The Service’s work therefore informed this report at the mid-point of July 2022.

## Childcare Sufficiency Assessment Research Methodology January – June 2022

This Childcare Sufficiency update report has been researched and produced via:

1. analysis of up-to-date demographic population forecast data pending the release of the full Office for National Statistics (ONS) Census 2021 data
2. analysis of outcomes of structured interviews with the Early Years Childcare providers/settings situated in the City of London, that took place in early summer 2022
3. analysis of the outcomes of an online survey that was promoted to City of London resident parents and carers in March–May 2022 and which focused on the theme of Early Years and Childcare needs.

## 1. Key Updated Demographic Context

Demography remains a critical factor with regard to the sufficiency of localised childcare – from a demand and need perspective.

This City of London childcare sufficiency update for summer 2022 includes recent demographic data, pending the finalised publication of the comprehensive national 2021 census figures by the ONS.

1.1 Table 1 indicates the estimated population of 0–18-year-olds within each of the City of London’s wards as published by the ONS in September 2021 – pending the release of the 2021 ONS national census in late summer 2022 – figures which will be included in the next (subsequent to this version) City of London Sufficiency report in late 2022.

Table 1 – Resident population of 0–18-year-olds in the City of London (ONS 2021)

| Ward               | All ages | 0-2 years | 3-4 years | 5-7 years | 8-11 years | 12-14 years | 15-18 years | Total 0-18 years |
|--------------------|----------|-----------|-----------|-----------|------------|-------------|-------------|------------------|
| Aldersgate         | 2,601    | 61        | 57        | 90        | 131        | 57          | 31          | 427              |
| Bishopsgate        | 360      | 6         | 6         | 2         | 10         | 3           | 14          | 41               |
| Cripplegate        | 2,726    | 81        | 63        | 77        | 110        | 102         | 95          | 528              |
| Farringdon Within  | 496      | 6         | 3         | 18        | 41         | 24          | 34          | 126              |
| Farringdon Without | 1,742    | 47        | 26        | 13        | 30         | 28          | 52          | 196              |
| Portoken           | 2,181    | 41        | 38        | 146       | 136        | 45          | 89          | 495              |
| Queenhithe         | 467      | 9         | 12        | 29        | 3          | 3           | 12          | 68               |
| Tower              | 365      | 11        | 7         | 6         | 1          | 6           | 4           | 35               |

Table 1 indicates that the ward which has the highest number of resident 0–18-year-olds remains the Cripplegate ward (which incorporates the Barbican estate), followed in frequency by the Portoken ward (which incorporates the Mansell Street estate and the Middlesex Street estate).

1.2 Table 2 shows inflow migration and outflow migration aligned to the City of London locality for the period 2018–2020. The Table indicates that inflow, in particular international inflow, was higher than outflow of people. Previous years had shown an identical incidence and the proportion of inflow in comparison to outflow had been increasing year-to-year.

Table 2 – Inflow and outflow migration, City of London, 2018–2020 (ONS 2021)

|                |                                 | Mid 2018 – Mid 2020               |         |                                |         |
|----------------|---------------------------------|-----------------------------------|---------|--------------------------------|---------|
| City of London | Mid-2019 Pop. Estimate = 9,721  | Long-term International Migration |         | Internal Migration (within UK) |         |
|                |                                 | Inflow                            | Outflow | Inflow                         | Outflow |
|                |                                 | 1,232                             | 388     | 1,116                          | 977     |
|                | Mid-2020 Pop. Estimate = 10,938 | Long-term International Migration |         | Internal Migration (within UK) |         |
| Inflow         |                                 | Outflow                           | Inflow  | Outflow                        |         |
|                | 1,433                           | 192                               | 879     | 915                            |         |

1.3 Finally, as an initial recap of key demographics for the City of London locality, it can be noted that various sources of research indicate that City workers are still only gradually returning to their offices. For example, in June 2022 Bloomberg UK published research<sup>2</sup> which concluded that (only) *“about 60% to 70% of City employees are back at their desks...less than the 75% commuting prior to the omicron wave taking hold in late 2021”*. The research also concluded that *“businesses pushing for a return to the office continue to meet resistance from employees enjoying a better work-life balance as a result of not having to travel in every day”*. Other research has called this a ‘working from home revolution’. In June 2022, King’s College also promoted its research which reported that:<sup>3</sup>

- Six in 10 London workers say they are now hybrid working, as defined by working from home at least one day a week and from their workplace fewer than five days a week.
- Of those in work at the time, 37% said they worked from home at least one day a week on average before the pandemic. Double this proportion – 75% – report doing so in the past four weeks.
- **Three-quarters of London workers think we’re never returning to the previous way of working where most people come into their workplace five or more days a week.**

Such findings continue to be critical with regard to the sustainability of the City of London’s private sector childcare providers – and their latest views and feedback on this theme are summarised in the following section.

## 2. Feedback from City of London Early Years Childcare Providers

The narrative below summarises feedback, aligned to specific themes, received (as an outcome of structured interviews undertaken through telephone or virtual/web e-interviews) from representatives of seven of the City’s eight Early Years Childcare providers during the period April – May 2022.

### 2.1 Occupancy and business confidence in the first half of 2022

2.1.1 In terms of the fundamental subject of occupancy, representatives of the settings interviewed reported that attendance was buoyant and returning to pre-COVID levels, though not – in the case of the private sector representatives – having returned to those 2019 levels, as yet.

Two representatives outlined their anecdotal opinion that there had been incidence of families deciding to move out of their (City of London located) estate and away from London.

The representatives of the City of London’s private sector settings, i.e., Bright Horizons City Child, Smithfield House Nursery, Hatching Dragons Nursery and Newpark

<sup>2</sup> <https://www.bloomberg.com/news/articles/2022-06-11/city-of-london-offices-still-not-as-busy-as-before-omicron>

<sup>3</sup> <https://www.kcl.ac.uk/policy-institute/assets/wfh-revolution-how-new-ways-of-working-are-changing-london.pdf>

Childcare Centre (Barbican Nursery) each outlined their opinion that City of London worker/employee footfall was starting to “*steadily*” increase, including as increasing numbers of such individuals commuting in to the City and arriving at Farringdon, Liverpool Street and Cannon Street railway stations.

One setting summarised the experience of others when feeding back that “*our occupancy has really gone up [to 93% at this time] since November last year*”.

Another stated that “*we have 60 children on roll at the moment and quite a few starts for September... the situation is much more positive than it was*”.

Essentially, there was optimism returning with regard to the essential theme of occupancy (enquiries – including through ‘walk ins’ – leading to increasing) – for example, aligned to feedback from one representative who stated how:

*“The situation is looking more optimistic and we have had a greater interest from parents to send their children to nursery than at any other time over the past 18 months...”*

However, the same representative echoed views of two other interviewees when stating “*we have to be aware though that [City employees] working from home is still a factor*”.

Encouragingly, another private sector representative stated that “*we have recently had eight ‘show arounds’ in just one week*”.

Final feedback on the theme of occupancy was that three representatives reiterated that some parents were continuing to seek flexibility around *when* they accessed a nursery. Tuesday, Wednesday and Thursday were the most requested days, aligned, (it was thought by representatives) to such parents working mid-week and having extended time at home on Mondays and Fridays (though still working on those two week days, however, working from home and caring for a child simultaneously at home).

2.1.2 Six of the seven representatives interviewed stated that their setting currently had a waiting list, post Easter 2022. Three representatives reported that they were particularly experiencing enquiries about places for 2-year-olds – including two of the City of London’s private sector nurseries, with one such representative stating:

*“This kind of does indicate a baby boom during lockdown... we are certainly seeing enquiries for this age group”*.

Another Childcare representative stated:

*“Our two-year-olds’ room is our busiest room”*.

Two representatives of nurseries also reported (words to the effect of) “*Our baby room is also much busier than it has been for a while*”.

It was noted, however, that one of the private sector settings did not have a waiting list at the time of their interview in May 2022. In contrast, one private sector setting had 40 names on a waiting list, including children ready to start attending in September 2022.

2.1.3 Each representative was invited to rate their business confidence in early summer 2022.

Two representatives stated a rating of *very confident* and five stated *quite confident*.

2.1.4 As with the childcare sufficiency research that was undertaken in winter 2022, a number of the representatives highlighted a belief – and a tangible incidence – that the number of children experiencing speech, language and communication difficulties had increased by the advent of COVID-19.

Two such interviewees passed on their opinion that local primary schools (including The Aldgate School) should continue to be aware that a higher number of pupils than pre-pandemic would, in all likelihood, join local Reception classes with such needs. One of these interviewees believed that up to a third of their setting's current cohort of 3-4 year old pupils were evidencing (both diagnosed and undiagnosed) speech, language and communication difficulties.

## 2.2 Feedback on recruitment and retention

2.2.1 In December 2021, the Early Years Alliance published its Breaking Point report which surveyed just under 1,400 people in the Early Years Childcare sector. The report made a number of conclusions, the majority of which had relevance for the City of London during the immediate post-COVID period:

- 84% of responding settings were finding it difficult to recruit suitable new Early Years staff, with 60% finding it 'very difficult'. The reasons most commonly cited by these respondents were:
  - a lack of applicants for roles (87%)
  - applicants lacking full and relevant Early Years qualifications (70%)
  - an inability to meet the salary demands of applicants (52%)
- 62% of respondents said they were aware of staff who had left their setting in the past six months and had left the Early Years sector completely
- 49% of respondents said they had to use bank or agency staff over the previous six months
- 21% of respondents had to reduce or otherwise restrict opening hours as a result of lack of adequate staff over the previous six months
- 49% of respondents had to limit or stop taking on new children due to a lack of sufficient staff over the previous six months
- 61% of respondents who had experienced staffing shortages over the previous six months said that it had a negative impact on quality
- 46% of respondents felt pessimistic about having sufficient staff in 12 months' time
- 34% of respondents thought that it is likely that a lack of adequate staff will result in their setting or rooms in their setting being forced to close *temporarily*

over the next 12 months

- 16% of respondents thought that it is likely that a lack of adequate staff will result in their setting being forced to close *permanently* over the next 12 months
- The most commonly cited reasons for staff leaving the workforce were: feeling undervalued by the government (77%); job-related stress (72%); and poor pay (57%).

Additionally, in May 2022, the National Day Nurseries Association reported how nurseries across the UK were being forced to close or reduce their services *“at an alarming rate because they are struggling to recruit and retain staff”*. The organisation also reported how *“some smaller nurseries have had to reduce their opening hours and a lot of really experienced practitioners are leaving the profession”*.

**2.2.2 Five of the seven representatives interviewed stated that recruitment and retention had been an issue or challenge for them, too, in 2022.** This included the four private day nurseries that operate in the City of London.

Direct feedback included:

*“We are losing staff on a regular basis... recruitment is simultaneously proving to be hard work as well, including with candidates not showing up<sup>4</sup> or not interviewing well.”*

*“It has been hard to find people... we had one candidate who sent her son to be interviewed instead of herself...”*

*“When COVID-19 started to decrease, that is when we saw some staff leave... some people left because of the money – they saw that they can earn more elsewhere.”*

*“We are having problems finding qualified staff... even though our company tends to offer ‘better wages’ and holidays packages...”*

*“We see problems too when staff are off [work] sick... it is making maintaining our ratios very hard..*

*“As a nursery we are racking up huge agency [staff] fees... like others we are really struggling to find qualified staff on a permanent basis... I think staff are starting to discover they can earn more money for a lot less responsibility.”*

One interview deemed the challenges with retention as being related to the *“psychology of the pandemic”* and how the COVID-19 pandemic had *“jolted”* the sector’s workforce into realising how the responsibility of their role – and the stresses that accompanied it – did not see any recognition aligned to what they tended to earn in the sector.

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<sup>4</sup> In June 2022, the publication Nursery World reported this as a growing concern and problem: <https://www.daynurseries.co.uk/news/article.cfm/id/1673152/Nurseries-say-job-applicants>

## 2.3 Family support type services

Each setting representative was invited to state whether they personally believed that the City would benefit from family support type services **at its Northern and Western geographic location**, in order to supplement the traditional (outreach) role and delivery undertaken by City Child and Family Centre.

There was clear support – among such interviewees – for broadening of the City Children’s Centre services offer to a hub-and-spoke model, with two settings expressing an interest in hosting any extended Early Years and Childcare/best start-type offer:

*“I know that some Barbican parents would like it if someone again, like my setting, decided to run a parent and toddler group around that area, which would be additional to the group run at Barbican library.”*

*“My setting [in the western vicinity of the City of London] would be interested in potentially hosting a parent and toddler group or parents drop-in as a part of an extended service.”*

*“There could be an increased emphasis on out-of-school childcare in the north of the City.”*

## 3. Feedback from City of London Online Survey with Parents and Carers

The narrative below summarises feedback received from almost 100 parents and carers in response to an online survey which was promoted by the City of London in spring 2022, via channels including its Family Information Service, The Aldgate School and the locality’s Early Years Childcare settings.

The online survey was additionally promoted via informal channels, including the Barbican Parent’s WhatsApp group and local Facebook pages.

3.1 The analysis that follows focuses on the responses of parents/carers who evidently were resident within the City of London.

The average age of the children that were being cared for and raised by responding parents/carers was 5 ¼ years of age, with the most frequent age group being 0–12 months.

The average number of children that each responding carer/parent had was 1.68 – in comparison to the national English average of 1.7.

3.2 14% of responding parents/carers stated that they had at least one child aged 0–18 years in the family who had special educational needs and disability (SEND) – with the most frequent type of SEND being speech language and communication

needs, followed by autism spectrum conditions.

### 3.3 In terms of the fundamental usage of childcare:

- 19% of responding parents/carers stated they were accessing formal (registered with Ofsted) childcare *only*.
- 19% of responding parents/carers also stated they were accessing informal (not registered with Ofsted) childcare *only* – for example, family (including themselves), friends, neighbours, a nanny or an au pair.
- 52% of responding parents/carers stated they were accessing a combination of formal and informal childcare only.
- 10% of online respondents chose not to specify the service they were using.
- 25% of responding parents stated that, as of spring 2022, they were working – however, they were working from home.

Table 3 indicates the frequency with which all relevant responding parents/carers stated that they were currently accessing a type of formal or informal childcare – in late spring/early summer 2022.

Table 3 – Frequency with which responding parents/carers stated that they used specific types of childcare during term times

| Type of childcare registered or non-registered childcare | Percentage of relevant responding parents/carers |
|--|--|
| Day nursery – full-time or part-time                     | 23%  |
| Pre-school or playgroup i.e. sessional childcare         | 6%   |
| Nursery class in a state school                          | 4%   |
| Nursery class in an independent school                   | 8%   |
| Registered childminder                                   | 6%   |
| After-school Club  | 31%  |
| Holiday playscheme                                       | 4%   |
| Breakfast Club   | 21%  |
| Nanny or au pair   | 15%  |
| Grandparents   | 8%   |
| Other family members                                     | 4%   |
| Friends  | 6%   |

Table 3 indicates that the three types of formal (registered) childcare that were being accessed by City of London parents with the highest frequency in spring 2022 were (in order of frequency):

1. After-school Club
2. Day nursery
3. Breakfast Club

3.4 It can be noted that 10% of responding parents/carers stated that the out-of-school childcare that they were accessing was located outside of the City of London – most frequently in the London Borough of Islington, followed in frequency by the London Borough of Hackney.

3.5 10% of parents who had a 3-year-old and/or 4-year-old stated that they were currently accessing the universal 15 hours free entitlement for 3- and 4-year-olds (with 40% stating that they were buying additional hours, most frequently at the same setting).

No (working) parents who had a 3-year-old and/or 4-year-old stated that they were currently accessing the 30 hours childcare offer for 3- and 4-year-olds, though this may have been affected by their income.

3.6 Qualitative feedback about the universal 15 hours free entitlement for 3- and 4-year-olds included:

*“It is very good for me, but more hours at 3 years would be much more helpful.”*

*“The cut-off times are unfair in my opinion. Families should be able to sign up whenever their child enters childcare.”*

Qualitative feedback about the 30 hours childcare offer for 3- and 4-year olds included:

*“I would use this, if it was 40 hours.”*

*“I am a parent with a 3-year-old and I don’t know anything about this.”* – and similarly:

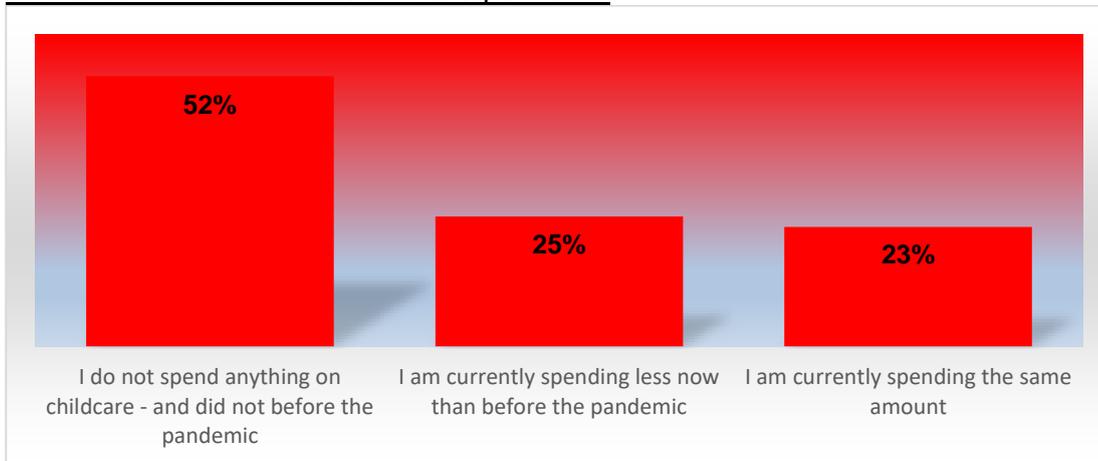
*“I don’t know enough about 30 hours childcare.”*

*“I wish I knew if 30 hours is available to me.”*

3.7 Parents and carers were invited to provide feedback on the theme of funded childcare.

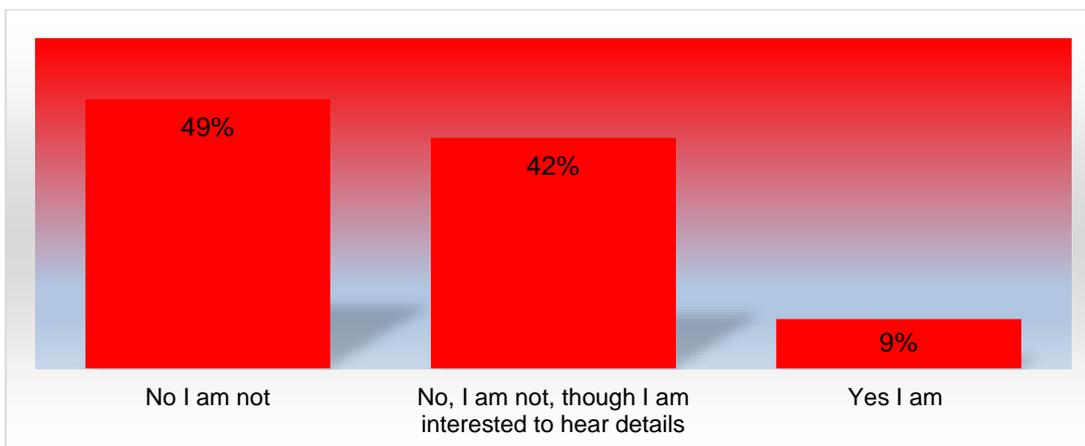
Those parents who were paying for some form of childcare stated whether this was any different from how much they were spending before the COVID-19 pandemic.

Diagram 1 – Proportions of parents/carers stating whether they were spending more or less on childcare than before the COVID-19 pandemic



3.8 Parents and carers were also invited to state whether they were aware of the existence of the City of London Childcare Affordability Scheme.<sup>5</sup>

Diagram 2 – Awareness of the City of London Childcare Affordability



3.9 All parents/carers were invited to state whether they had currently, or whether they had at some point in the past encountered any barriers to childcare.

<sup>5</sup> The Childcare Affordability Scheme helps parents living in the City of London meet the costs.

Diagram 3 – Incidence of reasons stated as to why a parent/carer was not accessing/receiving support with childcare

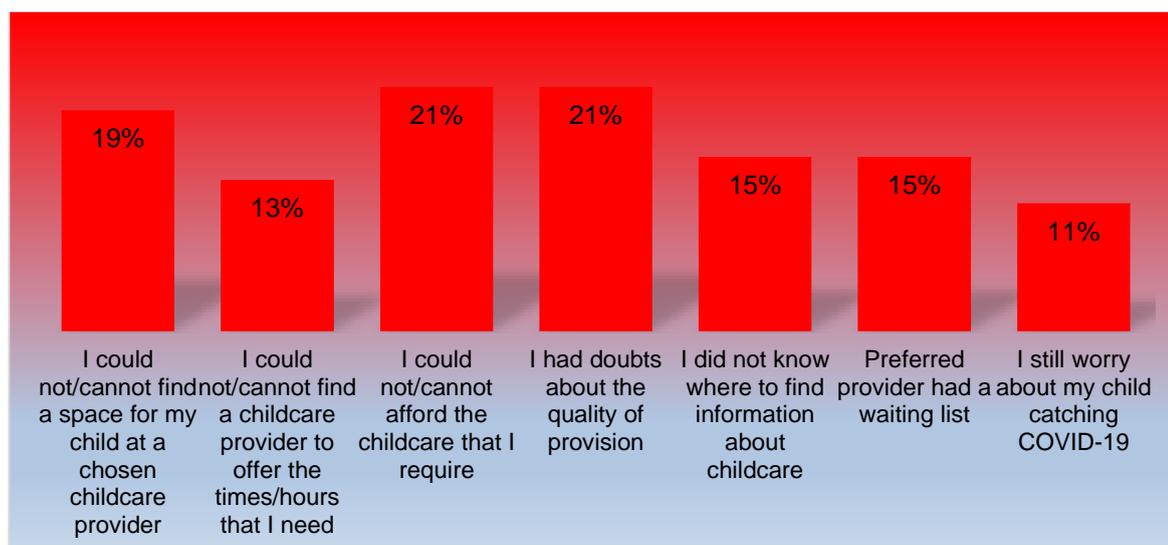


Diagram 3 indicates that the most frequent barrier that had been experienced by a responding City of London resident parent/carer at some point was “*I could not afford the childcare that I require*”, followed in frequency by “*I have had doubts about the quality of formal childcare provision*”.

In addition to the information presented in Diagram 3 – (only) 5% of responding parent/carers stated: “*I do not use formal childcare as much as I did before the COVID-19 pandemic*”.

3.10 All responding parents/carers were invited to respond to the question: *What in your opinion should the City of London be doing – or continue to do – in terms of supporting parents and carers in 2022, in direct relation to childcare?*

The most frequent type of feedback was (words to the effect of): “*They should be helping to ensure more childcare options during the school holidays.*”

Specific feedback on this theme included:

*“There really should be clubs to cover the long school holidays, like the scheme run by Society Links.”*

*“Could they help to provide more affordable options, especially during the holiday breaks?”*

The second most frequent type of feedback focused on the theme of affordability:

*“I think the City, like all local authorities, should aim to help subsidise childcare in the difficult period between 1 and 3 years when it is financially very hard to work and pay for childcare or you have to give up work and only do informal childcare.”*

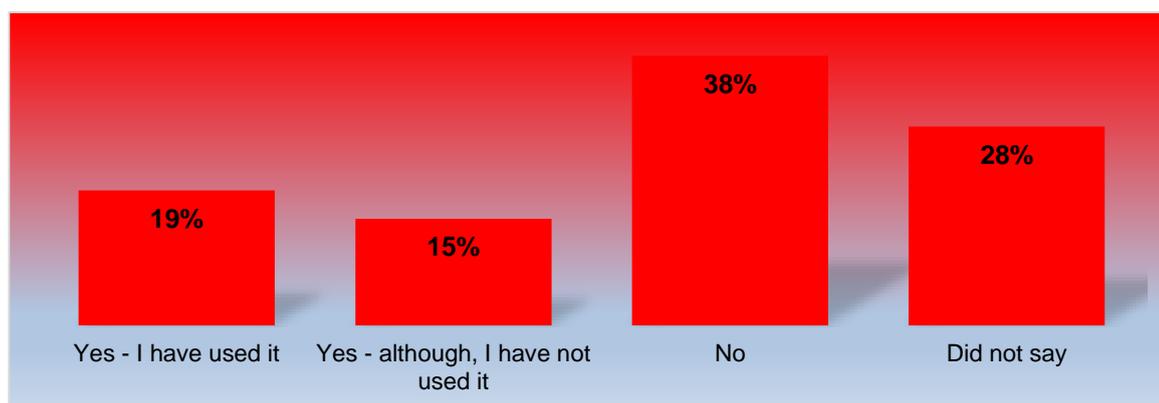
*“I am going to quit my current job as: a) I cannot afford childcare and; b) I cannot find*

cover for early mornings (I need to be at work by 8am).”

“There really has to be more state funding for childcare, as it is prohibitively expensive and driving people – mainly women – out of the workforce. Instead of a new HQ for Morgan Stanley on the Museum of London site there should be a new state school (primary and secondary) with a nursery!”

3.11 Responding parents and carers were requested to say whether they were aware of the existence of the City of London Family Information Service:

Diagram 4 – Awareness among responding parents/carers of the City of London FIS



3.12 All responding parents/carers were asked if they were aware of the City of London Talks and Listens Enthusiastically (COLTALE) Programme, which aims to support children to develop the best possible speech, language and communication skills.

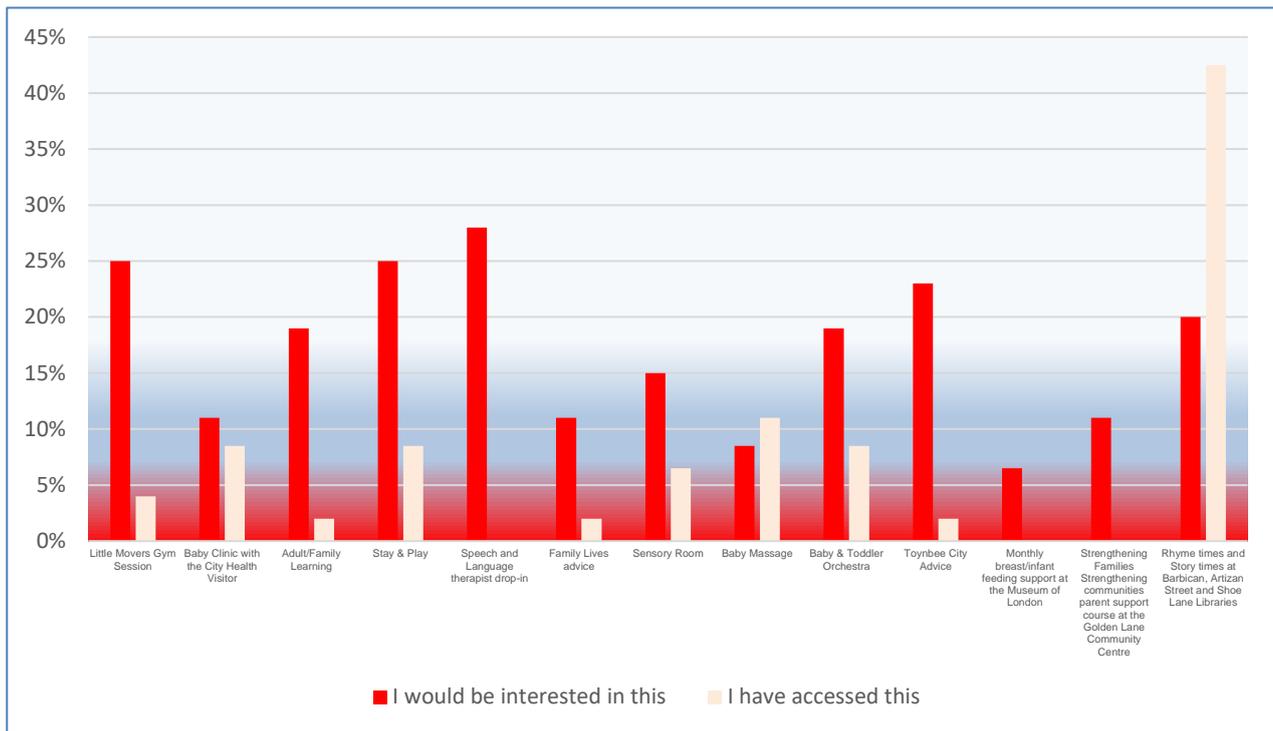
Table 4 – Parents awareness of the COLTALE programme in late spring 2022

| Response                           | Percentage of relevant responding parents/carers |
|------------------------------------|--|
| Did not say                        | 29%  |
| No                                 | 56%  |
| Yes – although, I have not used it | 7.5%   |
| Yes – I have used it               | 7.5%   |

Table 4 indicates that approximately (only) 1 : 6 of responding parents were aware of the COLTALE programme in spring 2022.

3.13 Parents and carers were also invited to provide feedback on the best Start for Life themed services and activities – and the extent to which they accessed such provision or whether they may like to in the future, possibly as part of an extended geographical scope of offer by the Child and Family Centre at The Aldgate School.

**Diagram 5 – Feedback on Start for Life type services, activities and provisions**



3.14 Diagram 5 indicates that the three types of activities and forms of support that responding parents/carers had evidently accessed at some point in time with the highest frequency were:

1. Rhyme times and Story times at Barbican, Artizan Street and Shoe Lane libraries
2. Baby Clinic with the City Health Visitor
3. Drop-in Stay and Play family sessions.

3.15 Diagram 5 also indicates that the three types of activities and forms of support that responding parents/carers would evidently consider accessing at some point, including as part of an extended offer from City Child and Family Centre, were:

1. Speech and Language therapist drop-in
2. Little Movers and Gym sessions
3. Drop-in Stay and Play family sessions.