



Reading Childcare Sufficiency Assessment 2020-2021

Early Years Childcare
Sufficiency Assessment

The assessment is a statutory
duty of the Childcare Act 2006

OWNER

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VERSION

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Contents

Introduction	4
Purpose of the Childcare Sufficiency Assessment (CSA).....	4
Reading demographic information	6
Childcare Providers in Reading	7
Childcare places available in Reading	9
Early Years Childcare Providers Opening Times.....	11
Early Years Childcare Costs	11
Childcare Quality.....	12
Ofsted Ratings of Childcare Providers in Reading.....	13
Early Years Funding.....	13
Three and four-year-old funded early education entitlement	13
15 hours funded childcare	13
30 hours funded childcare	13
Two-Year-Old Funding – Spring 2020	14
Universal Funding (three and four-year-old) – Spring 2020	14
30 Hours Extended Entitlement Funding – Spring 2020.....	15
Early Years Pupil Premium	15
Disability Access Fund.....	15
Childcare for School Aged Children	16
Priority Actions in the Childcare Sufficiency Assessment	18
Appendix 1	20
Provider Survey.....	20
Two-Year-Old targeted funded childcare	20
Universal Funding (Three and Four-year-olds)	20
Extended 30 Hours Funding.....	21
Business.....	21
Access for children with Special Educational Needs and Disabilities (SEND)	21
Sustainability.....	21
Out of School Care – Survey Findings	22
Appendix 2	23
Parent Survey.....	23
Access to childcare.....	23
Two Year Old targeted funded childcare	24
Universal Funding (Three and Four year olds).....	24

Extended 30 Hours Funding.....	24
Childcare costs	24
Response to COVID 19	24
Appendix 3	25
Housing data	25
Appendix 4	26
Eligibility Criteria for Funded Early Entitlement for two, three and four-year-old children.....	26
Two-Year-Old national criteria.....	26
30 hours extended entitlement	27

Introduction

The Childcare Act 2006 places a legal duty on all local authorities to ensure that there is sufficient childcare in their area. In particular, the local authority has a duty to:

- Secure sufficient childcare, so far as is reasonably practicable, for working parents, or parents who are studying or training for employment, for children aged 0 – 14 (or up to 18 for disabled children)
- Secure early years provision free of charge for all three and four year -olds and eligible two-year-olds (570 hours a years)
- Secure 30 hours free childcare for working parents
- Provide information, advice and assistance to parents and prospective parents on the provision of childcare in their area

The duties in the Act (section 6) requires local authorities to shape and support the development of childcare in their area in order to make it flexible, sustainable and responsive to the needs of the community. This role is described as the “market management” function, supporting the sector to meet the needs of parents, children and young people, parents and stakeholders.

Under Section 6 of the Act there is a requirement on local authorities to produce an annual sufficiency report on the availability and sufficiency of childcare in their area. The responsibility to complete the annual sufficiency assessment is delegated by the local authority to Brighter Futures for Children.

Section 7 requires local authorities to secure prescribed early years provision free of charge. This provision is for eligible children aged two, three and four-year-old. All three and four-year-olds are eligible for some funded early years provision.

Nationally approximately 40% of two year -olds are legally entitled to Funded Early Years provision, based on national criteria (see appendix 4):

The Childcare Act (2016) extended the Childcare Act (2006) and the duty to provide universal entitlement for three and four year olds; since September 2017 eligible families have been entitled to 30 hours funded childcare for three and four year olds, extending the previous provision of up to 15 hours a week (570 hours a year) universal early learning for this age range.

Section 12 places a duty on local authorities to provide information, advice and assistance to parents and prospective parents relating to the provision of childcare and services or facilities that may be of benefit to parents and prospective parents, children and young people. It is advised this Childcare Sufficiency Assessment is viewed alongside the information available on the Reading Family Information Service (FIS).

Purpose of the Childcare Sufficiency Assessment (CSA)

This assessment provides a summary of childcare provision in Reading with the aim to support:

- Parents to gain an understanding of the types of childcare on offer in Reading and help to inform decisions about childcare options for their family
- Childcare providers to understand the local childcare market and to help them make informed choices to better meet the childcare needs of families in Reading

- Brighter Futures for Children staff by providing a structured picture of the current childcare offer in Reading that informs potential actions for market management to meet demand and the forward strategic planning for primary school places.

While complying with the duties above local authorities must have regard to statutory guidance provided by the Department for Education. This ensures that early years funding is offered consistently and fairly. The latest guidance on early years funding can be found at the following www.gov.uk/government/publications/early-education-and-childcare--2

The publishing of the annual Childcare Sufficiency Assessment is part of the local authority's legal duty in managing the childcare market to ensure there is sufficient childcare. It must be recognised that the statistics and data are fluid and constantly changing. This document only provides a snapshot of the position of the childcare market at any given time. It must be noted that this year has been particularly challenging to provide meaningful data and analysis of the childcare market in Reading. Nevertheless, this assessment still provides a good indication of trends or areas for further investigation and action, and the tools used in the production of the assessment enable ongoing analysis and monitoring of the childcare data for future planning.

The Childcare Sufficiency Assessment will be of interest to parents, providing them with an overview of the childcare which is offered across the town and in their locality. It will be useful to existing and potential childcare providers when considering a change to delivery model, expanding provision or starting up in new areas. The childcare market is particularly dynamic, with many factors affecting demand and supply, especially parental choice. The findings of this report are indicative only and further detailed analysis of local areas should be undertaken by childcare providers to fully understand the local market. This report is to be shared with the public, local authority officers, elected members and the childcare market.

Covid-19

This assessment is for the year 2020-2021, however, due to extraordinary circumstances most of the data has been taken from March 2020 when the market was last stable. This document highlights some of the short- term impact for the sector since Covid-19 restrictions were put into place.

The country has experienced three lockdowns due to the Covid-19 pandemic since March 2020. Guidance issued to the sector during significant periods of 2020/21 has entailed periods of schools and childcare providers only being open for children of critical workers and vulnerable children. Concerns have been publicised nationally and locally of the impact on the sector as many childcare providers, even with government support, will struggle to remain financially viable if the situation continues.

Following the initial lockdown in March 2020, government signalled the wider opening of early years and childcare provision on 1 June 2020. A large majority of local providers re-opened on this date, albeit with restricted numbers and in some cases a reduced offer for parents. There was a steady increase in children attending from September 2020. However, the two- week lockdown in November followed by a further lockdown from January 2021 has seen numbers fall once more. Early Years provision was advised to remain fully open during this latest lockdown, but parental confidence has resulted in a low take-up of places. It is difficult to predict future demand. Although much of this assessment is based on the data prior to Covid-19, the action plan responds to the impact and identifies measures the local authority will take to support childcare providers in future.

The main findings of this report are:

- There are no sufficiency issues related to quality of childcare provision, as 97% of providers in Reading were judged Good or Outstanding by Ofsted at their most recent inspection (Ofsted inspections of Early Years provision have been suspended (except the most urgent) throughout lockdown.
- There are currently sufficient childcare places for 0-4 year olds, including funded early education entitlement places for two, three and four year olds, albeit some may not be in the area preferred
- The town centre and Whitley ward have been identified as areas to monitor regarding future growth where the number of families is anticipated to increase over the next few years in line with housing development. Sessional care in Whitley is particularly low.
- Parents have a varied choice of childcare providers in most areas of Reading

Reading demographic information

Estimated population of Early Years aged children living in Reading			
Under 5 Population Reading	Male	Female	Total
Total	5861	5428	11289
0	1097	1033	2130
1	1115	1085	2200
2	1220	1113	2333
3	1252	1149	2401
4	1177	1048	2225
Data Source – ONS Mid year 2019			

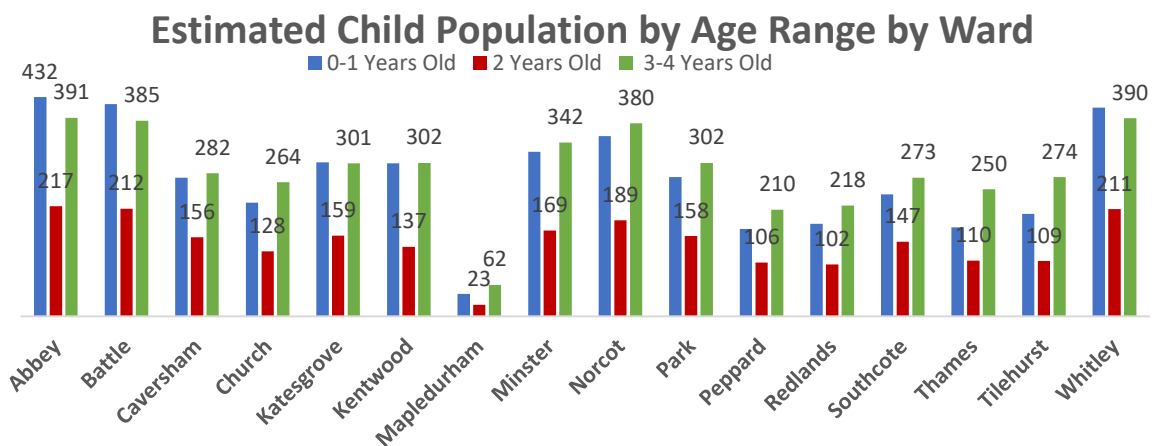
Nationally the under 5 population grew at the slowest rate for 15 years between mid-2018 and mid-2019. This is due to the lowest number of births for 14 years alongside an increase in emigration and a fall in international immigration. Reading data reflects the national change in the population of children who are 2-years old and under but the number of 3-year-old children living in Reading has slightly increased.

Reading is a vibrant town, hosting the headquarters of several multi-national companies. It also has good transport links across the South East and more favourable house prices than London. Data for Reading shows a decrease in the birth rate over the last six years and factored with a net negative migration number has resulted in a slight decrease in the under 5s child population. The development of housing in Reading (appendix 3) shows there are currently 5387 planning permissions.

A high number of housing development could increase the challenges in maintaining sufficiency of childcare places in the future. Wards such as Abbey and Whitley are developing new housing at a much higher rate than other wards, especially in the form of flats. Traditionally families living in flats within the town centre would migrate to the suburbs as their family grew. The current economic environment could see more families remaining in their properties which would see us experience an increase in demand for childcare within the town centre.

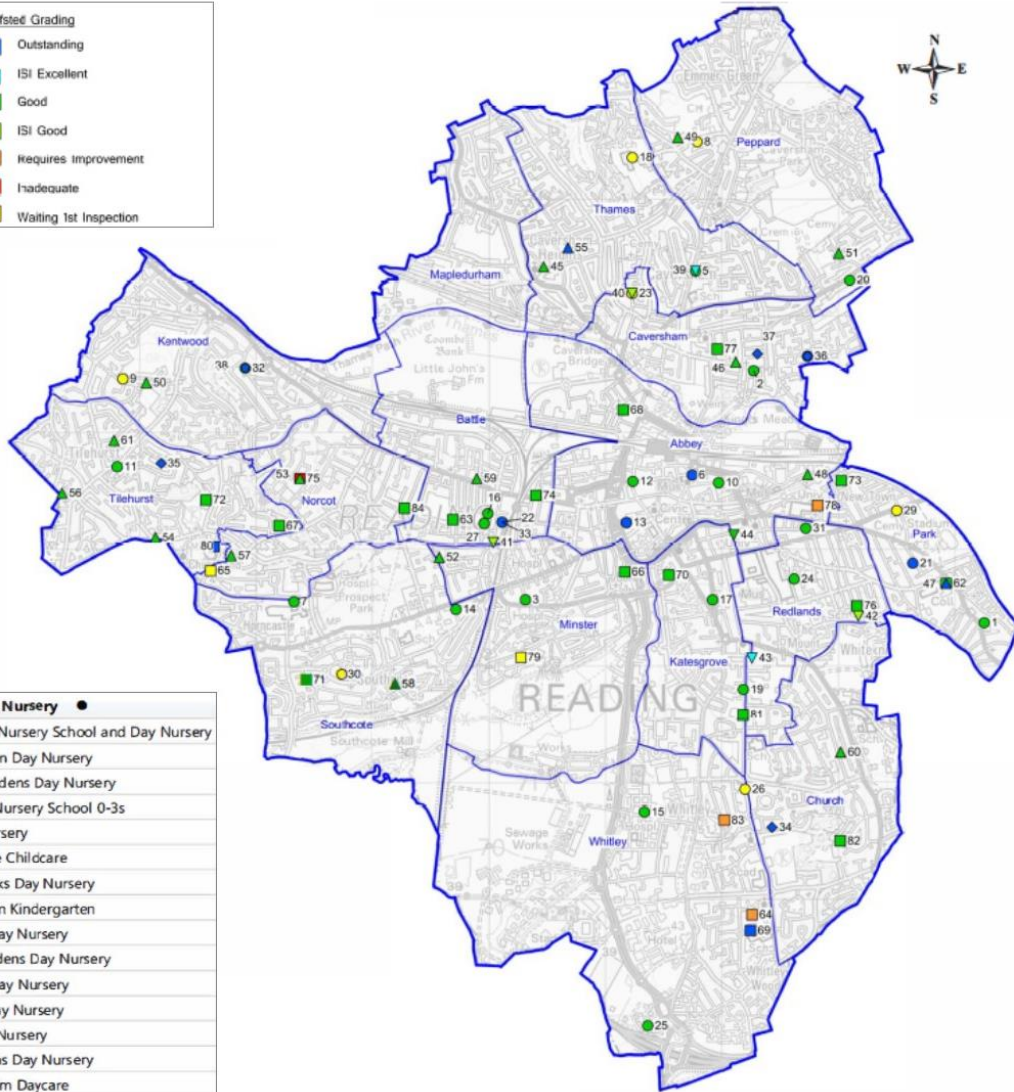
The potential increase in population due to growth in housing development could have a significant impact on the demand for childcare. New homes, jobs, schools and improved transport links could increase the potential need for early years childcare in the town.

Type of Provision	January 2018	January 2019	January 2020
Pre-School	20 ↓	20 →	19 ↓
Full Day Care	30 ↓	32 ↑	34 ↑
Independent Nursery	6 →	6 →	6 →
Childminder (registered and claiming EY funding)	33 ↑	32 ↓	34 ↑
Childminder (Not claiming EY funding)	78 ↑	87 ↑	77 ↓
Maintained Nursery School	5 →	5 →	5 →
Maintained Nursery Class	22 →	22 →	22 →
Total Providers	194 ↑	204 ↑	197 ↓



Childcare Providers in Reading

Reading maintains a consistent mix of childcare provision with delivery of places from all provider types including day nurseries, pre-schools, primary schools, maintained nursery schools and childminders. As of January 2021, there were a total of 197 early years childcare providers in Reading. This was a decrease of 7 providers from the previous year. Most of the closed providers were childminders and one was a pre-school whose premises were returned to a local church. Despite the impact of Covid, in January 2021 the majority of provision remains open with a small number of childminders closing and new start-ups entering the market. Overall numbers have remained fairly constant over the last year.



ID	Private Day Nursery
1	Abbeymore Nursery School and Day Nursery
2	Banana Moon Day Nursery
3	Berkeley Gardens Day Nursery
4	Caversham Nursery School 0-3s
5	Chiltern Nursery
6	Co-operative Childcare
7	Dickory Docks Day Nursery
8	Emmer Green Kindergarten
9	Fledglings Day Nursery
10	Forbury Gardens Day Nursery
11	Goldilocks Day Nursery
12	Greyfriars Day Nursery
13	Kennet Day Nursery
14	Little Dragons Day Nursery
15	Little Kingdom Daycare
16	Littlelots Nursery
17	Mary Seacole Day Nursery
18	MonkeyMoos Highdown
19	Northumberland Day Nursery
20	Orchard Day Nursery
21	Park Day Nursery
22	Pine Rivers Kindergarten Day Nursery
23	Play Day Nursery
24	Rainbow Day Nursery
25	Reading International Busy Bees
26	Sure Start Whitley Children's Centre,
27	The Bee's Knees Nursery
28	The Coley Lodge
29	The Honey Bee Day Nursery
30	The Lodge Day Nursery
31	The Wigwam Day Nursery
32	Waterside Day Nursery
33	Western Elms Nursery School

ID	Nursery
34	Blagdon Nursery
35	Blagrove Nursery School
36	Caversham Nursery School
37	New Bridge Nursery
38	Norcot Early Years Centre

ID	Independent School
39	Caversham Preparatory School
40	Hemdean House School
41	St Edwards Prep
42	St. Joseph's College Preparatory School
43	The Abbey School
44	The Deerway Montessori School

ID	Pre-School
45	Caversham Heights Pre-School
46	Crawshay Pre-School
47	Crescent Under Fives
48	Dingley's Promise
49	Emmer Green Pre-School
50	Little Badgers Pre-School
51	Micklands Pre-School
52	Parkside Pre-School YMCA Reading
53	Ranikhet Rainbows Pre-School
54	St Michaels Pre-school
55	St Andrew's Pre-School
56	St Joseph's Nursery
57	Stepping Stones Pre-School Group
58	The Grange Pre-School
59	The Honey Bee Pre-School
60	The Little Owl Pre-School
61	Victoria Road Pre-School

ID	Primary
62	Alfred Sutton Primary
63	Battle Primary Academy
64	Christ the King RC Primary
65	Churchend Academy
66	Coley Primary School
67	English Martyrs RC Primary School
68	EP Collier Primary School
69	Geoffrey Field Infant School
70	Katesgrove Primary School
71	Manor Primary School
72	Moorlands Primary School
73	New Town Primary Academy
74	Oxford Road Community School
75	Ranikhet Primary Academy
76	Redlands Primary School
77	St Annes RC Primary School
78	St Johns CE Primary School
79	St Mary & All Saints CE Primary School
80	The Avenue Special
81	The Palmer Primary Academy
82	The Ridgeway Primary School
83	Whitley Park Nursery & Primary School
84	Wilson Primary School

Title: Childcare Providers in Reading Nursery, PreSchool and Out of School Childcare Providers as of 20th August 2020
 Ref: Childcare_Providers_Oct 2020.wor
 Dwg No.: GIS00297
 Produced by GI & Business Systems
 Date: 11/12/2020
 Scale at A3: 1:35000

Map of Early Years Childcare providers in Reading (not including Childminders) and Ofsted grading

Childcare places available in Reading

The number of Reading childcare providers has remained constant over the last 3 years. As some businesses have closed others have opened to rebalance the market. Reading has seen a 9% decrease in registered childminders not offering early year funding. Some of these are due to retirement rather than economic factors.

The largest number of Ofsted registered places are in the Full Day Care sector. These places are to secure sufficient childcare for working parents to access. Many day care settings have been adversely affected over the last twelve months by an overall decline in parental demand caused by the COVID pandemic and subsequent changes to working practices. The sustainability of the sector will be dependent on parental demand in the short to medium term. There is a risk if demand reduces providers may close and then if demand rises in the future it will be challenging to revitalise the Early Years childcare market.

The Family Information Service (FIS) is contracted to deliver childcare information on behalf of Brighter Futures for Children. The team manages and collates childcare data in order to provide free individually tailored information, advice and guidance directly to parents and carers. The Family Information Service advises and supports childcare providers to update their Local Offer. The Local Offer covers the services they provide in Reading. Local Offers are promoted via the Reading Services guide - www.reading.gov.uk/services guide.

The number of registered places represents the maximum number of children who can attend a setting at any given time. Places offered at settings depends upon the provider type, accommodation and staffing levels, with some providers having multiple settings across Reading. The number of available childcare places in a setting can vary depending on staffing ratios and age ranges of the children. The vacancy numbers can fluctuate rapidly, as children may leave a setting or change times they attend. The majority of providers reported having current vacancies (see appendix 1) suggesting parents are able to access places for their children, although these may not be in the desired location.

Providers may choose not to offer all registered places and operate below their maximum capacity for either financial or staffing capacity.

Childcare capacity, in particular for pre-school children, fluctuates throughout the year. Places come under increasing pressure in the summer term ahead of school intake to Reception in September. This results in a challenging environment to predict sufficiency on an annualised basis and especially in the last twelve months due to the pandemic and subsequent lockdowns.

Childminders offer places across the age ranges and make a significant contribution to the stock of available childcare in Reading.

Provision for children and young people aged 11-14 years old is more likely to be out of school (in the form of clubs, activities and groups) and delivered by schools, for their own pupils and for less than two hours. This provision is not required to be registered as childcare with Ofsted. Data shows there are significant gaps in certain wards for Out of School care and Holiday provision, however the supply does meet the demand with regards holiday club and out of school provision in relation to childcare. There are increased requests for activity clubs in the 12+ age groups rather than formal registered childcare, this can be fully supported by the Family Information Service for universal

services. There is however an increase demand for clubs for short breaks and activities for children and young people with SEND, including formal childcare as a respite offer. It is unknown the impact of the pandemic and restrictions placed on these providers and their future decisions and financial sustainability.

Number of Childcare Providers By Type & Ward – March 2020

	EY Funded Childminder	Childminder	Day Nursery	EY Funded Independent School	Pre School	Maintained Nursery School	Maintained Nursery Class	Total
Abbey	2	3	4	1	1	0	2	13
Battle	4	6	5	1	1	0	2	19
Caversham	1	3	3	1	1	2	1	12
Church	1	1	0	0	1	1	1	5
Katesgrove	0	1	2	0	0	0	2	5
Kentwood	3	3	2	0	1	1	0	10
Mapledurham	1	4	0	0	0	0	0	5
Minster	2	4	1	0	2	0	2	11
Norcot	3	7	0	0	1	0	3	14
Park	4	6	3	0	1	0	2	16
Peppard	1	17	2	0	2	0	0	22
Redlands	0	0	2	2	0	0	1	5
Southcote	4	0	3	0	2	0	1	10
Thames	0	11	3	1	2	0	0	17
Tilehurst	3	9	1	0	3	1	3	20
Whitley	2	5	3	0	0	0	3	13
Total	31	80	34	6	18	5	23	197

Reading has a good balance of childcare by type in each ward. Peppard has a high total number of providers, including 16 childminders and total number of childcare places responsive to the demands of the Ward. Mapledurham has low childcare places reflective of the low child population. Abbey ward has one of the highest number of day care providers. Data shows that Abbey ward is one of our most populated wards with increasing residential development.

The four Wards with the highest percentage of Reading's under 5s population are Abbey 9.2%, Battle 9%, Whitley 9% and Norcot 8.2%. The overall percentage of registered childcare places in Abbey 9.1% matches population estimates, however, the population estimates in Battle 6.8%, Whitley 8.2% and Norcot 3.9% fall short if childcare demand is high. This is especially so in Battle which has seen a day care setting close since March 2020 so any excess demand may put additional pressure on neighbouring wards such as Abbey. The demand in Norcot ward which only has 3.8 % of registered childcare places in Reading could be met by childcare providers on the border with Tilehurst ward and provision based in West Berkshire. It should be noted that Abbey and Battle wards both include registered places available at independent schools. The highest number of current housing planning permissions are in Abbey and Whitley wards. Increased child population within these two wards

could put pressure on the current availability of childcare places. Analysis of attendance data for January 2019 showed that most children attended an early years provider in their home ward.

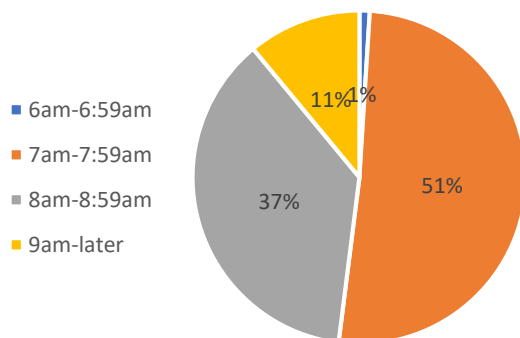
Parental choice and flexibility play a large part in determining childcare sufficiency making local demand difficult to predict. The largest percentage of registered places in Reading is in the full day care sector which generally offers more flexibility to meet the demands of working parents. The shifting childcare need of parents currently affected by the COVID pandemic is starting to impact some childcare providers as indicated in our Provider and Parent surveys. Recent census data will enable a fuller analysis of childcare take-up and the wider impact on the market into the future.

The assessment concludes that although there are local variations in places offered by different providers, on the whole Reading has a balanced childcare market.

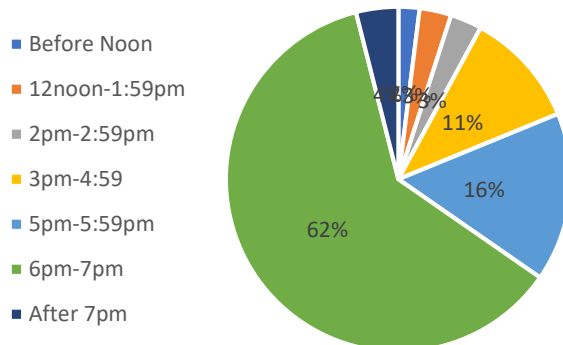
Early Years Childcare Providers Opening Times

Most childcare providers open between 7am to 8am and close between 6pm to 7pm. Only 1% opened earlier than 7am and 4% closed later than 7pm. Childminders tended to have the most flexibility in the hours they offered.

Opening Times



Closing Times



70% of childcare providers are open all year round. This includes a large number of childminders who may not offer early years funded places. 30% of childcare providers offer term time only funded places. Most of these places are offered in pre-schools and maintained nursery schools and classes. Two childminders can offer weekend care.

Early Years Childcare Costs

Average Costs of Childcare in Reading by Provider Costs (March 20 snapshot from Providers)

	Per Hour	Per Session	Per Day	Per Week	Per Term
Childminder	£5.25	£25.14	£45.67	-	-
Day Nursery	£6.65	£32.47	£56.28	£224.68	-
Pre-School	£5.62	£16.82	£33.85	-	-
Holiday Scheme	£7.50	£27.20	£30.18	£208.88	-

According to the Family and Childcare Trust childcare prices have increased above inflation in 2019/20, with the average cost of a full week care for children under two years old at £231.27. 61 a week. The average price for families using an after-school club for five days is £60.99 per week. Information gathered from Reading childcare providers indicates that their hourly charge is around the national average and can vary both between types of settings and between individual providers.

Early years entitlement hours are currently funded at an hourly rate of £4.88 for 3 and 4 year olds which is below the average childcare hourly rate charged across all providers. The early years funding rate was increased by 8p per hour in April 2020 after several years without an increase.

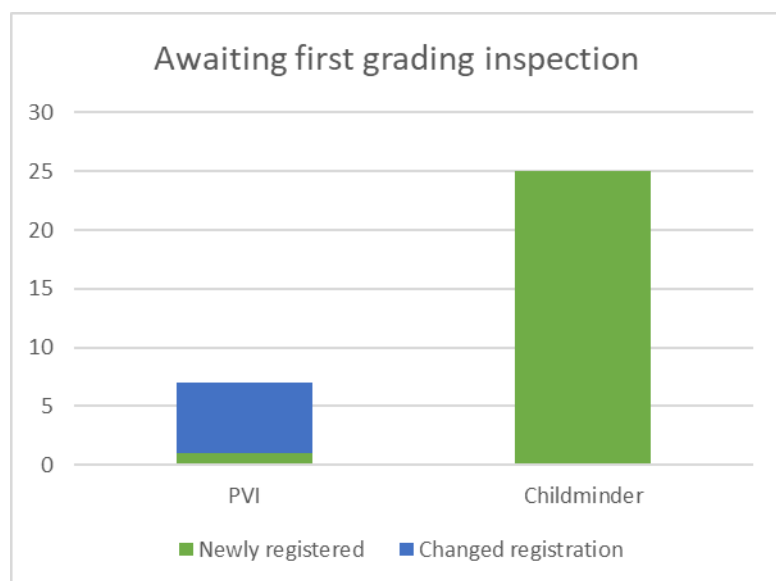
Childcare Vouchers and Tax Free Childcare (TFC) are schemes designed to financially support working parents by providing tax savings or topping up contributions. The majority of childcare providers are now signed up to this scheme can save parents up to £2000 a year per child on their childcare costs.

A large number of parents/cares who responded to the annual childcare survey considered childcare costs to be high which had an impact on household finances (see appendix 4)

Childcare Quality

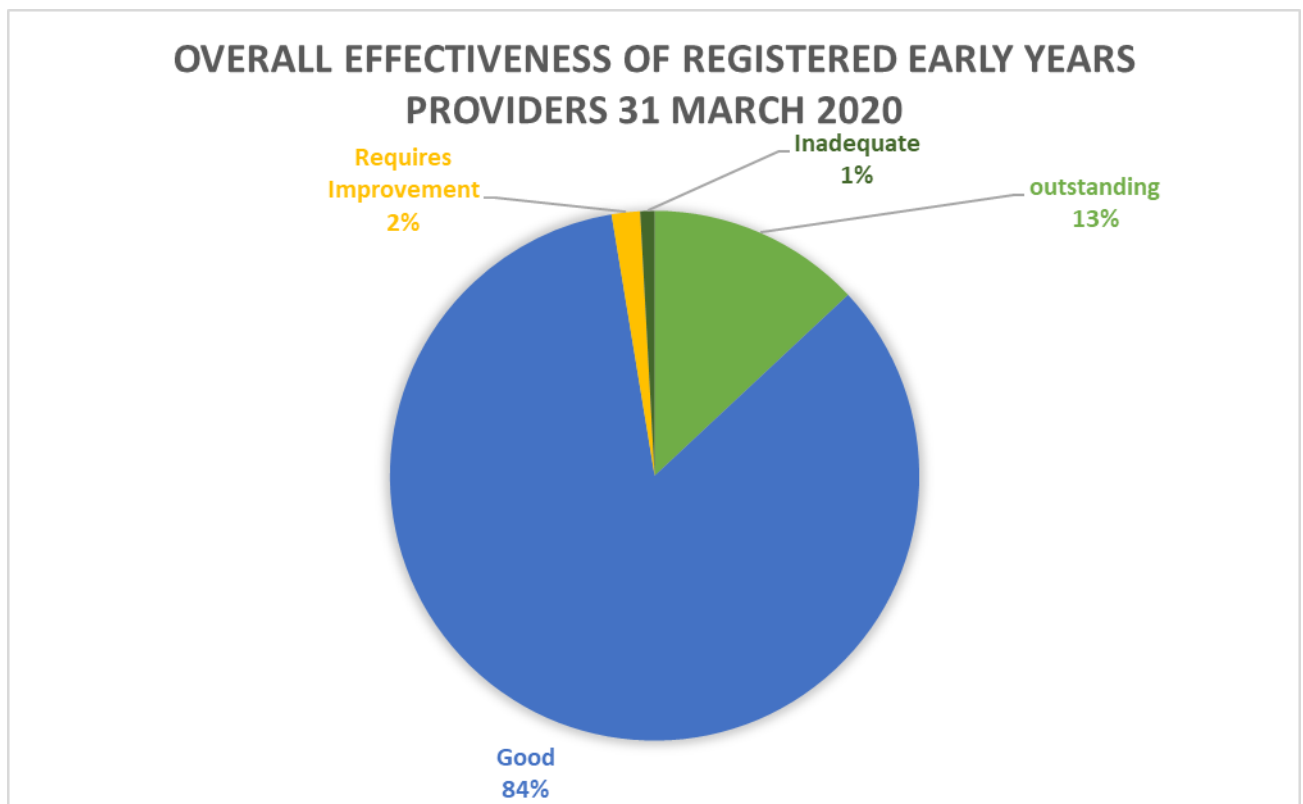
Childcare standards are regulated by the Office for Standards in Education, Children’s Services and Skills (OFSTED). Ofsted registered providers are checked for safety and suitability for caring for children. All childcare settings, who care for children under eight years old, are legally required to be registered with Ofsted on their childcare register.

In Reading there are a number of newly registered childminders. Childminders complete a rigorous registration process to meet Ofsted standards, so parents can be assured they provide good quality care prior to a grading inspection within 30 months. There are 7 PVI providers awaiting a grading inspection, six have either changed owner or premises, only one is completely new to Early Years practice.



Ofsted Ratings of Childcare Providers in Reading

Ofsted inspection outcomes as at 31st March 2020 established that most Reading childcare providers were rated Good (192/197). The 4 providers rated Requires Improvement and Inadequate are being supported by the Early Years team to make the required progress. On 17 March 2020, all routine inspections of schools, further education, early years and social care providers were suspended due to the Covid-19 pandemic. Urgent inspections where specific concerns continue. This allows Ofsted to prioritise the immediate safety of children where necessary. Ofsted may carry out further on- or off-site regulatory work if they receive information that needs actioning before the next inspection. They will publish an outcome summary on the Ofsted inspection report page relating to the provider if they need to take any action.



Early Years Funding

Three and four-year-old funded early education entitlement

15 hours funded childcare

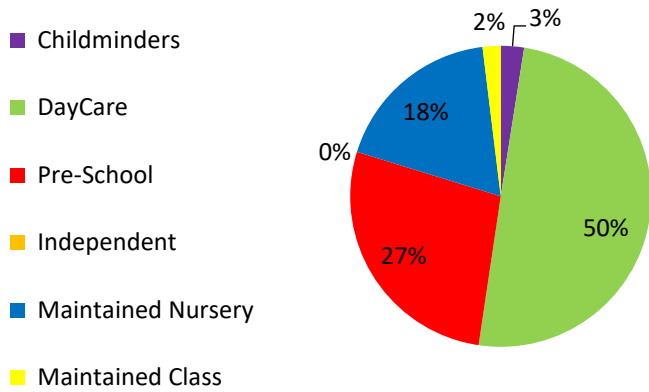
All three and four-year-old children in England are eligible for 570 hours of funded childcare per year from the term after their third birthday. This is usually taken as 15 hours a week for 38 weeks of the year known as “universal entitlement”. Providers can also offer this entitlement as a stretched offer across the whole year. This entitlement continues until the child is statutory school age.

30 hours funded childcare

The Government offers working parents of three and four-year-olds an extended early year of up to 30 hours per week for 38 weeks of the year (1,140 hours per year). This is known as the “extended entitlement”. National criteria for the extended entitlement can be found in the Appendix 4.

The 40% most disadvantaged two-year-old children (as defined in appendix 4) are eligible to claim a free early years place of 15 hours a week for 38 weeks (term time only) or the equivalent of 570 hours if they stretch it over a year.

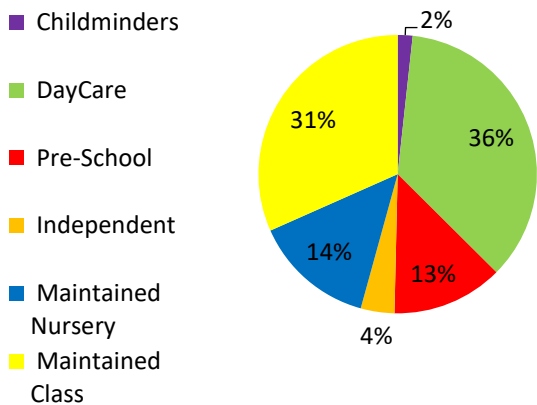
Two-Year-Old Funding – Spring 2020



2 Year Olds Claiming Funding		
2018	2019	2020
396	410	371
58%	65%	63%

The take-up percentage is calculated using estimated numbers supplied by the Government’s Department for Work and Pensions (DWP). The DWP numbers relate only to children that reside in Reading, however, families can choose to attend a setting in any local authority area. The majority of funded two-year-old children attend a Provider offering full day care, this benefits parents returning to work as the child can remain in the same setting at three years old. Throughout the lockdown there has been a decrease in the take-up of the two year old entitlement in Reading attributed mainly to parental confidence in sending their child to a setting.

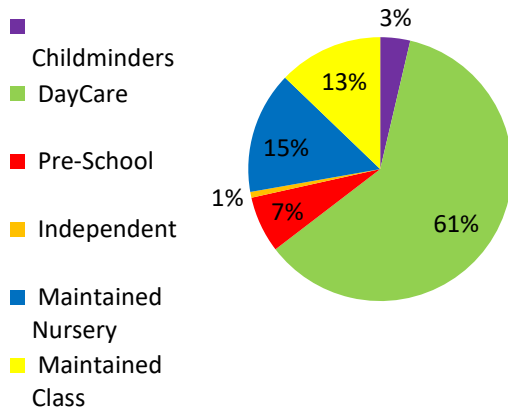
Universal Funding (three and four-year-old) – Spring 2020



3 & 4 Year Olds Claiming Universal Funding		
2018	2019	2020
3011	2888	3012
62%	60%	65%

There is an even balance of universal 15 hours funding being offered between the private and the maintained sector. In contrast, the majority of 30 hours places are still being claimed from private day care. The number of children claiming universal funding increased in Spring 2020 however this has decreased in January 2021.

30 Hours Extended Entitlement Funding – Spring 2020



3 & 4 Year Olds Claiming 30 Hours Extended Entitlement Funding		
2018	2019	2020
900	977	983
30%	34%	34%

The number of families claiming 30 hours extended entitlement funding has increased slightly from the previous year. The majority of these claims are in the day care sector suggesting that parents are combining it with wrap around childcare.

Early Years Pupil Premium

Early Years Pupil Premium (EYPP) is additional funding paid directly to early years settings to improve the education they provide for disadvantaged three and four-year-olds. Children from households on low incomes and receiving Universal Credit are entitled to EYPP. There were 381 three and four-year-olds funded for EYPP in January 2020 in Reading, 13% of the total cohort. The overall take-up is still considered to be a low however, additional information and marketing has increased the numbers of parents now being accessed for the entitlement. 74% of children in the PVI sector had a EYPP eligibility check run via the Education Checking System in Spring 2020.

Disability Access Fund

The Equalities Act 2010 requires local authorities and settings not to discriminate, harass or victimise disabled children, which may include making reasonable adjustments to accommodate children's' needs. Local authorities must comply with the provisions of the Act in finding suitable provision for eligible disabled children.

In April 2017 the Government increased support for children with disabilities through the introduction of a Disability Access Fund (DAF). The fund allows early years settings to claim £615 per year for every eligible child. The funding supports eligible children access their early years entitlement. Claimants will need to provide evidence of the child's Disability Living Allowance certificate. Since 2017 Reading has funded 106 children.

Childcare for School Aged Children

Estimated population of School aged children living in Reading By Ward			
	5 – 7 Year Olds	8 – 10 Years Olds	11 – 14 Year Olds
Abbey	556	444	430
Battle	564	497	560
Caversham	388	359	421
Church	351	378	499
Katesgrove	411	344	391
Kentwood	430	390	515
Mapledurham	102	123	180
Minster	503	408	469
Norcot	602	513	553
Park	436	384	482
Peppard	394	403	516
Redlands	257	282	407
Southcote	397	390	445
Thames	450	479	617
Tilehurst	396	388	467
Whitley	616	574	718
Total	6853	6356	7670

Data Source – ONS Mid-year 2019

There are an estimated 2,436 Ofsted registered places for school-aged children (aged 5 years old and over) being offered in out of school and holiday provision. Childminders play an important role for older children although their registered places have not been included in the provision table. Places are estimated based on Ofsted registration data. The number of Ofsted registered places incorporates provision for different age groups, it is at the discretion of the childcare provider how they allocate their places. Out of school provision may also be available after school (in the form of clubs, activities and groups) that are run by the school, for pupils attending the school, and for less than 2 hours. It is not required to be registered as childcare and is not always advertised with the Reading Family Information Service. The registered places included in the table below are based on full time numbers. Some Holiday clubs offer half day sessions.

Demand for After School Club and Holiday Provision is difficult to predict due to the age range it covers and the wide variety of care available. After school activities provided by schools may be available for limited hours (e.g. 45 minutes to an hour and therefore be too short for formal registration) and subject to short term cancellation.

Place data based on Ofsted registered provision may over-estimate supply for younger children (aged 4-7 years old). Providers may choose to operate with a lower number of children than they are registered for. Understanding operating capacity is a challenge for future sufficiency assessments, both to provide an assessment of the (currently) usable supply of places, and to provide an assessment of where there may be additional capacity to develop to cater for any unmet need. It is unknown the impact on this sector of childcare due to the lockdown restrictions placed on school aged children accessing provision.

Number of Childcare Providers By Type & Ward – March 20				
	Number of After School Clubs or Breakfast Clubs	Registered Places in After School Clubs or Breakfast Clubs	Number of Holiday Clubs	Registered Places in Holiday Clubs
Abbey	3	52	1	80
Battle	5	65	2	108
Caversham	4	40	2	80
Church	2	4	3	72
Katesgrove	5	114	3	190
Kentwood	0	0	0	
Mapledurham	0	0	0	
Minster	1	0	0	
Norcot	3	16	2	38
Park	4	85	0	
Peppard	7	236	2	104
Redlands	1	0	3	110
Southcote	1	0	2	138
Thames	2	0	1	
Tilehurst	2	50	0	
Whitley	2	50	1	
Total	42	1628	22	708

Impact of Covid-19 on Childcare Provision

In March 2020 childcare providers were advised to close to all children except children of keyworkers or children who were considered to be vulnerable. 46% of private, voluntary or independent childcare providers remained open to offer this care.

In June 2020 the Government eased restrictions and allowed all pre-school age children to return to childcare settings. At this point 93% of PVI's were open for business.

Childcare provision has remained steady since July with isolated closures of childcare bubbles due to outbreaks of Covid cases and a national lockdown in November 2020.

The result of the Parent and Provider childcare surveys indicate that parental confidence and a change in childcare demand is the biggest factor currently effecting the sustainability of Reading's childcare market.

Data collections from autumn term 2019 compared to autumn term 2020 reveals the following:

2 year old funded children – reduction of 45 children taking up their entitlement

3 & 4 year old Universal funding – reduction of 160 children taking up their entitlement

30 hours Extended Entitlement – increase of 9 children taking up their entitlement

36% of the Providers who responded to our childcare survey stated they do not currently have a business plan. This is an area which needs to be addressed in order to safeguard the future of Reading's childcare market.

82% of early years childcare providers were given a sufficiency payment in December 2020 to mitigate the effect that a reduction in occupancy levels had on their sustainability.

Action plan

Due to the pandemic and lockdown restrictions over the last year some of the actions from last report have been carried forward to this report along with actions that have emerged from analysis of current data and information.

Ensure there is sufficient, affordable childcare available to meet the needs of families moving out of lockdown. To achieve this:

- Monitor the local job market including new working patterns, flexible working and working from home and understand the impact on sufficiency of childcare
- Continue to seek the views of parents on their experiences of searching for and using childcare in Reading in collaboration with Family Information service and use these views to inform future planning of early years provision
- Support the sector to collaborate to ensure 30 hours childcare entitlement is delivered flexibly for working parents whilst maintaining the balance of places for babies and two year olds
- Promote the different ways that parents can obtain help with costs for childcare. This is particularly important as many parents in our parental survey stated that they found childcare expensive.

Ensure strategic planning includes mapping housing growth against existing projected demand for childcare provision


Increase the percentage of take-up by eligible two-year-old children by working with Reading under 5s services to investigate effective ways of promoting the entitlement widely to support access among eligible families

Work with providers to develop systems for the ongoing monitoring of capacity of places by age range, including where providers have vacancies

Work with Reading Borough Council colleagues to investigate options around the use of Section 106 to support development of early years provision

Continue to maintain and develop a strategic approach to early years sufficiency including:

- Improving children’s outcomes at Foundation stage and introduction of the new EYFS framework
- Supporting parents to stay in work or return to work
- Supporting and maintaining good professional standards within Reading’s childcare workforce. Monitoring Ofsted inspection outcomes and offer support to childcare settings requiring improvement.
- Work with all providers to support the changing childcare environment and ensure they receive current and updated information about policy direction and implementation.
- Continue to work with providers so childcare is inclusive and meets the needs of children with SEND and actively promote inclusive childcare to families who require it.
- Review sufficiency of specialist early years SEND places with a focus on social and communication difficulties
- Linking early years sufficiency work to primary school place planning

- 
- Support providers to understand local parental demand in a changing environment and the business opportunities and risks this introduces including claiming for Early Years Pupil Premium and Disability Access Fund.
 - Support recruitment and retention to the childminding sector and actively encourage participation in Readings Childminder Partnership.
 - The Covid-19 Pandemic has brought significant new challenges to our early years providers, and at the time of writing this assessment, many settings have asked for support and advice from the Early Years team. This will be provided in the form of business planning and financial sustainability.

Appendix 1

Provider Survey

Settings delivering early years funded places were asked to complete a questionnaire in order to explore in more detail how early years is delivered in Reading. This survey was sent out October 2020 therefore responses could have been affected by Covid restrictions implemented from March 2020. A total of 55 childcare settings responded, this represents an overall response rate of 65%. The breakdown of response represented each sector is as follows:

Pre-school	25.45%
Day nursery	21.82%
Independent nursery/School	7.27%
Childminder	43.64%
Other	1.82%

We also ran a questionnaire for providers offering wrap around and out of school care. The response rate was quite low with only 13 settings responding. The low response rate is attributed, in part, to some settings being closed due to Covid 19 restrictions.

Two-Year-Old targeted funded childcare

40 Providers reported offering two-year-old funded places.

A total of 287 funded places were reported as available with 24 settings stating they had current vacancies.

47% of Providers did not have a waiting list

53% of Providers offered funded only sessions.

Universal Funding (Three and Four-year-olds)

39 Providers (71%) responding to the survey offered care from birth to statutory school age.

30 Providers (55%) offered Full Day Care, 13 (24%) Sessional care and 12 (23%) a mixture of both.

30 Providers (55%) stated they had current vacancies.

28 Providers (51%) said they offered funded only sessions with 36 (65%) stating they do not restrict hours to certain times in the day.

15 Providers (27%) asked families to pay for wrap around care to access their funded hours.

22 Providers (40%) charged for additional consumables such as meals or nappies.

Extended 30 Hours Funding

42 Providers (76%) offered full day care

46 Providers (84%) offered 30 Hrs funded places

40 Providers(72%) did not ask families to pay for wrap around care.

30 Providers (71%) were happy for families to attend more than one childcare provider.

Business

54 Providers (98%) accepted childcare vouchers or Tax Free Childcare

39 Providers (69%) had not increased their fees in the last 6 months

6 Providers (12%) have made redundancies in the last five months (since May 2020)

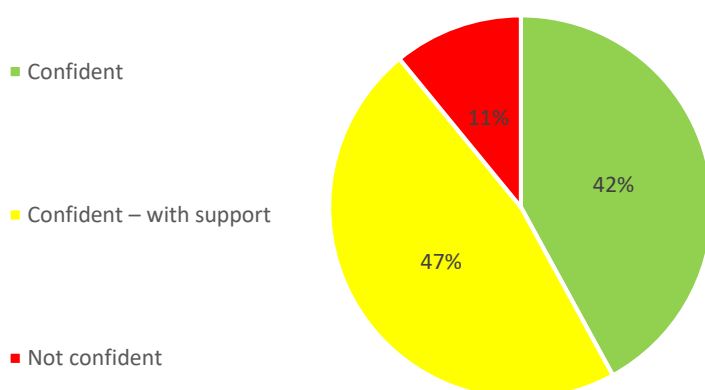
35 Providers (64%) accessed the Governments furlough scheme

20 Providers (36%) do not currently have a business plan

The greatest concern for settings sustainability was changing parental demand followed by government funding rates. 26 Providers (47%) reported that the biggest change to their setting since Covid restrictions were implemented (March 2020) has been parents requiring less childcare.

Access for children with Special Educational Needs and Disabilities (SEND)

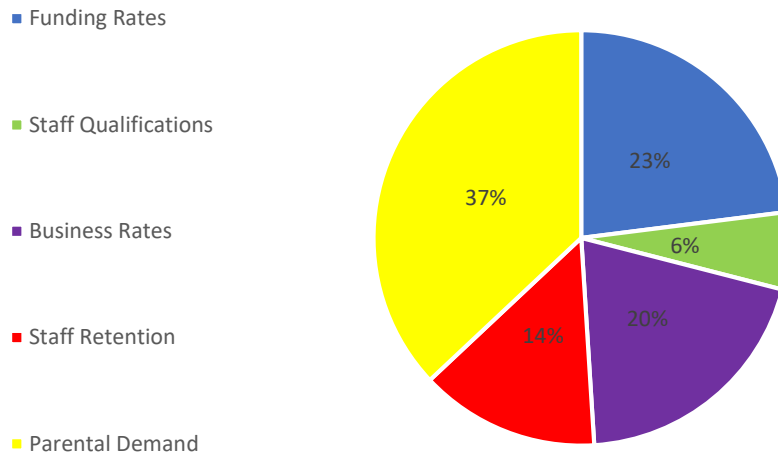
Providers were asked how confident they were offering care to SEND children.



Brighter Futures for Children launched a pilot called Brighter Beginnings Inclusion award in 2019. The scheme supports childcare providers to upskill staff and aids childcare providers to meet their statutory duty regarding SEND. The Inclusion Award helps to reassure parents that their children's needs will be considered and met, as well as assisting parents to make informed choices regarding their childcare. As at January 2021, nine childcare providers in Reading have now successfully achieved Level 1 of the Brighter Beginnings Inclusion award, as part of the pilot scheme.

Sustainability

We asked childcare providers whether they'd found or were anticipating any barriers to their business' sustainability. Their biggest concern was a change in parental demand, this is a large shift from last year's results which showed parental demand was their 2nd least concern.



Out of School Care – Survey Findings

We received a very low response to our childcare survey for out of school care, 13 settings. This may be due to the timing of our questionnaire as settings operating only during the holidays might not have been available to comment. Due to COVID restrictions some before and after school care may not be operating as normal.

- 15% of respondents were Holiday clubs, the rest were before or after school.
- 84% of the OoS providers opened for more than 2 hours each session
- 62% of OoS provision was run by Schools, 77% of care was offered on school premises.
- 85% of respondents offered care to children aged 5 to 11 years old.
- 12 providers stated they currently cared for a child(ren) with SEND, with 92% feeling confident to do so.
- None of the providers reported having a waiting list
- 92% accepted childcare vouchers or Tax Free Childcare
- Providers biggest concerns regarding sustainability were parental demand and funding rates.

Appendix 2

Parent Survey

The opinions of parents and carers were sought regarding childcare provision in Reading in October 2020 via a survey Monkey questionnaire. The survey was completed by 162 respondents. The number of responses was lower than in previous years due to the lack of publicising through children's centres, Settings and libraries.

Analysis of the responses suggests there was a good level of representation from the population as a whole, covering geographical distribution, age range of children and social economic backgrounds.

145 (90%) of those surveyed in our parent questionnaire stated they were satisfied with the quality of their childcare provision.

Other responses are as follows;

Access to childcare

- 130 (80%) said they had used informal or formal childcare in the last 12 months. The majority of children aged 0 to 4 years old were cared for within a Day Nursery or Pre-School. Children aged 5 to 10 -year-olds were generally cared for within an Out of School Care provision, by a Family Member, after school activity. Children over 10 years old used after school activities or stayed with friends.
- 131 (81%) parents/carers said it was important to access childcare close to their home. followed close to work (32%) and close to school (28%).
- 84 (52%) parents said they used between 15 to 30 hours of childcare a week.
- 112 (69%) parents/carers stated they were able to find the type of childcare they wanted in their local area compared to 74 (46%) thought there should be more childcare in their local area.
- Only 16 (10%) parents felt that childcare costs were reasonable.
- Of the respondents to the survey who did not access childcare 59% did not access childcare as their children were cared for by themselves or their partner followed by 37% who said it was too expensive to access.
- 133 (82%) parents/carers said they accessed childcare as it allowed them to work. 84 (52%) said it aided their child's development.
- 123 (76%) parents/carers stated they didn't require anymore childcare than they already accessed. The majority of those stating they required access to more childcare said they needed it from a family member followed closely by After School Clubs and Childminders.

Two Year Old targeted funded childcare

- 120 (74%) of parents questioned in our parent survey were aware that the Government offered targeted two year old funding.
- 8 parents (4%) reported using two-year-old funding as part of our parents' survey.

Universal Funding (Three and Four year olds)

- 147 (91%) parents questioned in our parent survey were aware that the Government offered 15 hours of free childcare regardless of income.
- Of the parents who reported using universal 15 hours funding, 48% claimed it during term-time only and 52% spread it across the year.
- Of those parents who used it term time only 29% purchases additional week.
- 50% of the 65% parents who purchased additional childcare hours paid for more than 10 hours each week.
- 60% of parents reported they didn't purchase additional hours because they were too expensive.

Extended 30 Hours Funding

- 60% of the 63 parents claimed their 30 hours funding at a different provider than their universal funding.
- 67% of parents said it did not encourage them to pay for more childcare.

Childcare costs

- The majority of the open comments received as part of our parent survey were regarding the high cost of childcare and the impact this had on family's finances.
- 38% of respondents stated that they had a combined household income of over £60,000.
- 37% of respondents said that costs stop them using childcare.
- The most popular method of paying for childcare is using direct payment such as bank transfer (39%). This was closely followed by Childcare Vouchers Schemes (23%) and Tax Free Child Care (19%).

Response to COVID 19

- When asked if they were using less childcare 2 (3%) parents said they were worried about exposing their child to the risk of contact with COVID. 18 (11%) they no longer needed the childcare due to a change of work pattern.

- 16 (10%) of parents said they were using more childcare as they weren't able to use friends or family.

Appendix 3

Housing data

Planning Permissions (Hard Commitments) outstanding as at March 2020	
WARD NAME	Planning Permissions
Abbey	2980
Battle	240
Caversham	67
Church	8
Katesgrove	255
Kentwood	27
Mapledurham	4
Minster	55
Norcot	129
Park	86
Peppard	18
Redlands	50
Southcote	11
Thames	6
Tilehurst	10
Whitley	1441
Total	5387

Appendix 4

Eligibility Criteria for Funded Early Entitlement for two, three and four-year-old children

Two-Year-Old national criteria

Economic criteria:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- The guaranteed element of State Pension Credit
- Child Tax Credits or Working Tax Credits and they have a gross annual income (before tax) of no more than £16,190
- Working Tax Credit run-on, which is paid for 4 weeks after they stop qualifying for Working Tax Credit
- Universal Credit - if you and your partner have a combined income from work of £15,400 or less per year after tax.

Non-economic criteria:

- Received a DWP postcard from the Local Authority with a unique reference number (URN) on
- the child has been in Local Authority care for 1 day or more
- the child has left Local Authority care under a special guardianship order, a child arrangement order or an adoption order
- the child has a statement of special educational needs (SEN) or an education, health and care plan (EHC)
- the child receives Disability Living Allowance

Non-EEA citizen who cannot claim benefits:

A 2-year-old may get funded childcare if the family is getting support under the Immigration and Asylum Act and have either:

- claimed asylum in the UK and are waiting for a decision (known as 'part 6')
- been refused asylum in the UK (known as 'section 4')

A 2-year-old may also get funded childcare if the household income is £15,400 a year or less after tax, and the family have either:

- leave to remain with 'no recourse to public funds' on family or private life grounds
- support from your local council because you have 'a child in need', for example they have a disability or a child protection plan
- the right to live in the UK because they are the main carer of a British citizen (known as a 'Zambrano Carer')

In Reading all eligible two-year-olds can access a funded early education place from the term after their second birthday. Each eligible child is entitled to up to 570 hours per year of funded early education from the term after their second birthday for a maximum of three terms.

30 hours extended entitlement

The following national criteria determine which children are eligible:

Both parents are working (or sole parent in a lone parent family) and over the next 3 months each parent/carer expects to earn:

- At least a weekly minimum salary equivalent to 16 hours at national minimum wage (for under 25-year-olds) or national living wage (if over 25 years old), and
- No more than £100,000 per year

Or

Both parents are employed but one or both parents is temporarily away from the workplace on parental, maternity, paternity or adoption leave or statutory sick pay.

Or

One parent is employed, and one parent is in receipt of either Incapacity Benefit, Severe Disablement Allowance, Carer's Allowance or contribution-based Employment and Support Allowance disabled or incapacitated based on receipt of specific benefits.

Immigration status

A parent will not be eligible if they are from outside the EEA and their UK residence card states they cannot access public funds.

However, their partner can apply instead if they're from:

- the UK or EEA
- outside the EEA and their UK residence card says they can access public funds