

London childcare providers survey 2011

Results

Summary prepared for the London childcare providers forum
- June 2011

Who the survey represents?

What Kind of childcare provider are you?

Type of provider	Percent	Count
Full daycare (private)	21%	88
Full daycare (voluntary)	2%	8
Full daycare (social enterprise)	2%	10
Full daycare (independent)	1%	3
Full daycare (maintained)	1%	6
Sessional	16%	69
Crèche	1%	2
Childminder	42%	182
Nursery school (private)	5%	23
Nursery school (voluntary)	1%	3
Nursery school (independent)	1%	2
Nursery school (maintained)	1%	3
Primary school with nursery and/or reception	2%	9
After school and/or breakfast club	3%	14
Holiday club	2%	8
Other (please specify)	4%	17
Total		430

*The figures in this document represent a minimum of 656 individual settings.

Do you provide childcare in a children's centre?

	Percent	Count
Yes	9%	38
No	91%	375
Total		413

Which network provider are you a member of, if any?

	Percent	Count
National Day Nurseries Association (NDNA)	13%	56
Pre-school Learning Alliance	28%	116
4Children	3%	12
National Childminding Association (NCMA)	35%	146
Local childminding network	17%	71
Other voluntary sector networks	5%	20
Local authority networks	29%	123
None	8%	33
Other (please specify)	6%	27
Total		419

Which London borough do you work in?

Pan-London	1%	3
Several boroughs	1%	4
Barking and Dagenham	1%	4
Barnet	7%	29
Bexley	13%	55
Brent	2%	8
Bromley	14%	59
Camden	1%	3
City of London	0%	0
Croydon	1%	5
Ealing	2%	7
Enfield	1%	3
Greenwich	7%	32
Hackney	0%	1
Hammersmith and Fulham	1%	5
Haringey	1%	3
Harrow	2%	7
Havering	1%	5
Hillingdon	2%	7
Hounslow	4%	16
Islington	0%	0
Kensington and Chelsea	0%	1
Kingston upon Thames	2%	7
Lambeth	8%	36
Lewisham	2%	7
Merton	7%	28
Newham	1%	3
Redbridge	1%	2
Richmond upon Thames	7%	28
Southwark	2%	9
Sutton	2%	9
Tower Hamlets	1%	2
Waltham Forest	6%	24
Wandsworth	1%	5
Westminster	3%	13
Total	100%	430

Your top issues

What are the top 5 issues currently facing you as a provider?

Issue	Percent
Parents not being able to afford the fees	39%
Training	39%
Ofsted inspections	39%
Sustainability of your setting	33%
Implementing the Early Years Foundation Stage (EYFS)	30%
Local authority cuts	30%
Improving outdoor play	28%
Level of free entitlement funding (Early Years Single Funding Formula)	19%
Engaging with parents	18%
Improving quality	18%
Staff recruitment, pay and retention	18%
Implementing the flexible 15 hours free entitlement for 3 & 4-year-olds	17%
Supporting children with disabilities and special educational needs (SEN)	17%
Balance of local authority funding between private, voluntary, independent and maintained sectors	15%
Understanding tax credits and other help with costs, for parents	13%
Direct cuts to your funding	13%
Working in partnership with local authorities	11%
Rising rents	10%
Measuring impact	7%
Implementing the free entitlement for eligible 2-year-olds	7%
Encouraging take-up of childcare by Black, Asian and Minority Ethnic (BME) families	4%
Payment by results	4%
Outreach work	4%
Implementing the extended schools and 'safe place to be' initiative	1%
No. of responses	369

Top 5 issues by provider type

	Full Daycare (All sectors)	Percent
1	Sustainability of your setting	39%
2	Improving outdoor play	37%
-	Parents not being able to afford the fees	37%
4	Staff recruitment, pay and retention	32%
5	Training	31%
-	Level of free entitlement funding (Early Years Single Funding Formula)	31%
	answered question	102

Sessional/Crèche		Percent
1	Sustainability of your setting	52%
2	Training	39%
3	Improving outdoor play	34%
-	Local authority cuts	34%
-	Parents not being able to afford the fees	34%
answered question		64

Childminders		Percent
1	Implementing the Early Years Foundation Stage (EYFS)	55%
2	Ofsted inspections	53%
3	Training	47%
4	Parents not being able to afford the fees	45%
5	Local authority cuts	29%
answered question		150

Out-of-school club/Holiday club		Percent
1	Staff recruitment, pay and retention	45%
2	Training	35%
-	Parents not being able to afford the fees	35%
4	Working in partnership with local authorities	30%
-	Local authority cuts	30%
-	Sustainability of your setting	30%
answered question		20

Nursery school/class		Percent
1	Level of free entitlement funding (Early Years Single Funding Formula)	49%
2	Local authority cuts	33%
-	Sustainability of your setting	33%
-	Staff recruitment, pay and retention	33%
5	Ofsted inspections	27%
-	Balance of local authority funding between private, voluntary, independent and maintained sectors	27%
-	Direct cuts to your funding	27%
-	Parents not being able to afford the fees	27%
answered question		33

Sustainability & managing your setting

What impact has the recession had on you?

	Percent
Increased demand for places	12%
Decreased demand for places	46%
Easier to recruit staff	4%
Harder to recruit staff	5%
Increased fee arrears	18%
Increased running costs	49%
Harder to maintain quality of childcare	11%
No impact	16%
No. of responses	353

If rising rent is an issue for you, who is your landlord?

	Percent
Local authority	11%
Private	17%
Church/diocesan	14%
Other (please specify below)	2%
Not an issue	56%
No. of responses	202

If staffing is an issue for you, which of the following is causing you the most concern?

	Percent
New Level 3 Diploma for the Children and Young People's workforce	7%
Training	12%
Staff recruitment	12%
Staff retention	3%
Paying staff salaries	18%
Not an issue	49%
No. of responses	214

If sustainability is an issue for you, what is putting most financial strain on your service?

	Percent
Rising rents	8%
Local authority cuts	13%
Lack of business/management knowledge	3%
Level of free entitlement funding	22%
Ability of parents to pay for childcare	32%
Not an issue	23%
No. of responses	265

*** 18 providers reported details of the extent of their fee arrears. Of those, two reported fee arrears of £10,000 and one reported arrears of £7,000 ***

Linking with others and working together in the future

How do you view your communications with your local authority?

	Percent
Very good	23%
Good	41%
Mixed	30%
Poor	5%
Very poor	1%
No. of responses	358

What cuts, if any, have you noted in terms of local authority support?

	Percent
Less training available	61%
More charging for training	42%
Fewer meetings between providers	17%
Less support for childminders	23%
Reduced capacity in the Family Information Service	13%
General reduced capacity in local authority support to childcare providers	25%
Children's centre closed or reduced its services	18%
Direct cuts to your own funding	18%
None	10%
No. of responses	337

Overall, what has been the impact of the free entitlement for 3 and 4 year olds on your setting?

	Percent
Very positive	25%
Quite positive	26%
Neither positive nor negative	31%
Quite negative	14%
Very negative	4%
answered question	188

Does not include childminders/out-of-school clubs/holiday clubs

Do you have someone with Early Years Professional status in your setting?

	Percent
Yes	40%
No	59%
Don't know	1%
No. of responses	194

Does not include childminders/holiday clubs/out-of-school clubs

If yes, what impact do you think this has had on the quality of the childcare provided?

	Percent
Very positive	49%
Quite positive	24%
Neither positive nor negative	24%
Quite negative	1%
Very negative	1%
answered question	82

Does not include childminders/holiday clubs/out-of-school clubs

What works best in terms of involving parents in their child's learning and development?

	Percent
Induction sessions	39%
Regular parents meetings	44%
Quick chats at drop-off and pick-up	86%
Opportunities for them to help out in some way	36%
Having staff with additional languages	25%
Handbooks and other materials for parents	47%
Website	19%
Email and SMS communication with parents	44%
No. of responses	355

What helps you link with other providers and share best practice, at a borough level?

	Percent
Borough provider network meetings	61%
Borough provider network newsletters	26%
Voluntary sector networks	11%
Exchange visits with other providers	28%
Joint training opportunities	50%
Mentors advising in the workplace	20%
Help with paying for cover when participating in networking and training activities	30%
Drop-in sessions and playgroups where providers meet	33%
Email forums/websites/information sent by SMS	32%
No. of responses	304

‘What is the most important thing local councillors or central government could do for childcare in your borough?’

When asked this question, the most common suggestions were:

- To maintain or increase funding, thereby making childcare more accessible and sustainable
- To provide more training for staff, and funding for staff cover
- To promote the value of childminders (as equal to nurseries)
- To reduce the amount of paperwork (associated with the EYFS) via active listening and consultation

‘In 2013 the free entitlement for the 20% most disadvantaged 2-year olds will be rolled out nationally. What actions need to be taken by providers and local authorities to ensure that this is implemented effectively in your area?’

The responses to this question were very mixed, with a lot of respondents expressing concerns about the implementation of this scheme. Some key points:

- There needs to be sufficient funding to ensure that this scheme is effective, and that providers do not face losses
- The most disadvantaged families should be provided for first
- The need for better information about this service for parents
- The need for better training on the scheme for providers
- Those with experience of the pilot scheme were largely positive, however there were some concerns over implementation

Funding:

“To ensure sufficient funding is available in order to have the necessary required staff to child ratios in place, to give good quality care to this younger age group and good support to disadvantaged families. “

“Will need to ensure that the level of payment accurately reflects costs in order to make this sustainable. In practice, many settings such as ours rely on income from places for 2 years olds to make up the shortfall on NEF funding for 3 & 4 years olds.”

“Most critically will be the level of funding There are enormous costs involved in providing for 2yr olds, especially part-time in a full day setting. At present, this nursery has been able to provide places for 2yr olds, by existing children claiming the funding and the family paying the remainder of the fees. This level of funding to date has been higher than 3 & 4 yr old funding, so has been sustainable. However, the size of the nursery and the level of funding does not allow the nursery to take children that come in for a limited amount of hours, as this takes up places for fee paying working parents and without the places being filled at full cost, the nursery would be financially unviable.”

Helping the most disadvantaged families first:

“criteria for allocating places needs to be adhered to which will ensure that those families that are most in need are given a place. local authorities need to ensure that providers have the quality and capacity within their staffing teams to deal with complex needs of families and to ensure their premises and daily routines are suitable - their Ofsted rating should not be used as a measure of quality and suitability.”

“Authorities need to better target disadvantaged families by working with health visitors, doctors and hospitals. It needs to be highlighted that it is for disadvantaged children as there are several cases where better off families think the free entitlement for 2 years old is available generally.”

“Providers and local Authorities to meet together to ensure the money is fairly divided up. Specific families/children should be targeted - through health visitors, Drs surgeries etc. Create/Meet with parents who have young babies to ensure they are aware of this money being available. Give out leaflets/newsletters at schools/clinics. Each family to “means” tested possibly.”

Information for parents and providers:

“parents need to be made more aware of this as otherwise they do not approach the setting in the first place, we do advertise but more needs to be done. clear training on what the procedures are.”

Training in how to allocate, calculate and complete relevant forms and adjustments. Good support from the borough with clear guidance on who to contact with queries.”

“A better understanding for childminders of how this will work in our settings.”

“Local authority needs to ensure staff are trained to look after 2 year olds and provide the funding to ensure the two year olds needs will be met, for example by providing the necessary resources. “

Those who have already piloted this scheme said:

“This is already happening in Bromley and we have had two children in our setting which have come under this umbrella. It posed us no problem at all.”

“Personally I already deliver free entitlement to 2 children (2 year project). Other than a decline in my weekly income (due to them taking part days which I then cannot fill the remaining hours) it has not caused any difficulties for me. I could see that in a larger setting it would impact on ratios and possibly have an even larger financial impact.”

However, there were some concerns:

“I’m really not sure the idea of defining the most disadvantaged is a good idea, I don’t know yet how it will work but I’m very worried about the strain on providers that the bureaucracy of such a system will entail. I think government should either fund 2 year olds or not. The tax system is there to help the disadvantaged. “

“Completely revise the free entitlement or we’ll face a second disaster. Expecting private companies to educate children at a financial loss is an economic model I have never encountered in any socio-political system anywhere in the world. If the government wants to provide free childcare, which is a laudable aspiration, then the government should pay for it, not force private companies to do so at a loss.”

“Hounslow was involved in a pilot scheme and it worked very well as the hourly rate covers our costs. My concern has been that often the children who are put forward for this scheme have a range of additional needs which need high ratios of well trained, knowledgeable staff. I believe that settings who have vacancies are possibly the nurseries who do not have the levels or calibre of staff to meet the needs of these children. This could, arguably, create environments that are: 1. Difficult to work in, thus creating high staff turnover; 2. Make it difficult for any child to thrive and have fun. I have voiced this at early years forums in Hounslow and the early years advisors have taken note and limited the number of children who access this funding (and who have additional needs). I believe this is good for all the children in settings.”

“The FE MUST be available to ALL CHILDREN not just the poor...what a label to put on them!!! If early learning is an entitlement than it should be available to all...let's copy other countries who do it so WELL!!”