

London childcare providers survey 2010

Results

**Summary prepared for the London childcare providers forum
- July 2010**

Q1. What kind of childcare provider are you? (please tick)

Type of provider	Count
Full day care (private)	79
Full day care (voluntary)	7
Full day care (social enterprise)	4
Full day care (independent)	4
Full day care (maintained)	2
Sessional	49
Crèche	2
Childminder	122
Nursery school (private)	10
Nursery school (voluntary)	4
Nursery school (independent)	1
Nursery school (maintained)	3
Primary school with nursery and/or reception	1
After school and/or breakfast club	18
Holiday club	14
Other (please specify)	12
Total Responses	282

Q2. Do you provide childcare within a Children's Centre?

	Percent	Count
Yes	9.3%	25
No	90.7%	244
Total responses		269

Q3. Which London borough do you work in? (please click on drop-down list)

Borough	Count
Pan-London	2
Several boroughs	4
Barking and Dagenham	2
Barnet	14
Bexley	3
Brent	21
Bromley	9
Camden	1
City of London	1
Croydon	15
Ealing	1
Enfield	9
Greenwich	3
Hackney	0
Hammersmith and Fulham	2
Haringey	2
Harrow	12
Havering	39
Hillingdon	2
Hounslow	3
Islington	1
Kensington and Chelsea	1
Kingston upon Thames	0
Lambeth	2
Lewisham	4
Merton	30
Newham	2
Redbridge	34
Richmond upon Thames	6
Southwark	1
Sutton	40
Tower Hamlets	2
Waltham Forest	6
Wandsworth	3
Westminster	5
Total responses	282

Q4. How many total full-time equivalent registered places are in your setting(s)? (please tick)

No. of children in setting(s)	Count
0-24 children	158
25-49 children	75
50-99 children	36
100+ children	13
Total responses	282

Q5. How many settings do you run in London? (please click on drop-down list)

No. of settings	Count
1	218
2	15
3 to 4	10
5 to 9	9
10 to 50	6
More than 50	2
Total responses	260

**Based on these figures, we can determine that the survey represents the views of a minimum of 570 providers*

Q6. Which provider network are you a member of, if any? (please tick all that apply)

Which provider network?	Percent
National Day Nurseries Association (NDNA)	14.1%
Pre-school Learning Alliance	30.9%
4Children	3.3%
National Childminding Association (NCMA)	37.5%
Local childminding association	7.1%
Other voluntary sector networks	4.1%
Local authority networks	32.3%
None	8.6%
Other (please specify)	3.3%
Total responses	269

Q7. * What are the top 5 issues currently facing you as a provider? (please tick up to 5)

Top 5 issues	Percent
Ofsted inspections	42.4%
Improving outdoor play	40.5%
Implementing the Early Years Foundation Stage (EYFS)	35.1%
Training	32.1%
Sustainability of your setting	28.2%
Improving quality	27.1%
Implementing the flexible 15 hours free entitlement for 3 & 4-year-olds	26.3%
Level of free entitlement funding (Early Years Single Funding Formula)	26.3%
Impact of the recession	24.8%
Engaging with parents	20.2%
Supporting children with disabilities and special educational needs (SEN)	19.1%
Staff recruitment, pay and retention	18.7%
Understanding tax credits and other help with costs, for parents	14.9%
Balance of local authority funding between private, voluntary, independent and maintained sectors	14.9%
Working in partnership with local authorities	14.5%
Rising rents	12.2%
Local authority cuts	11.8%
Implementing the free entitlement for eligible 2-year-olds	11.5%
Outreach work	5.3%
Encouraging take-up of childcare by Black, Asian and Minority Ethnic (BME) families	4.6%
Implementing the extended schools and 'safe place to be' initiative	1.5%
Total Responses	262

Top 5 Issues by provider type

	Full Daycare (all types)	Percent
1	Improving outdoor play	42%
2	Sustainability of your setting	36%
-	Level of free entitlement funding (Early Years Single Funding Formula)	36%
4	Improving quality	34%
5	Ofsted inspections	31%
-	Staff recruitment, pay and retention	31%
	answered question	86

Childminder		Percent
1	Ofsted inspections	59%
2	Implementing the Early Years Foundation Stage (EYFS)	53%
3	Training	43%
4	Improving outdoor play	36%
5	Impact of the recession	35%
Total responses		115

Sessional/Crèche		Percent
1	Improving outdoor play	52%
2	Level of free entitlement funding (Early Years Single Funding Formula)	42%
3	Implementing the flexible 15 hours free entitlement for 3 & 4-year-olds	40%
4	Sustainability of your setting	34%
5	Staff recruitment, pay and retention	32%
Total responses		50

Out-of-school/Holiday clubs		Percent
1	Implementing the Early Years Foundation Stage (EYFS)	45%
2	Improving outdoor play	40%
-	Training	40%
4	Supporting children with disabilities and special educational needs (SEN)	35%
-	Improving quality	35%
Total responses		20

Nursery School/Class		Percent
1	Improving outdoor play	61%
2	Sustainability of your setting	44%
3	Level of free entitlement funding (Early Years Single Funding Formula)	39%
4	Improving quality	33%
-	Implementing the flexible 15 hours free entitlement for 3 & 4-year-olds	33%
Total Responses		18

Q9. What impact has the recession had on you? (please tick all that apply)

Impact	Percent
Decreased demand for places	40.0%
Increased running costs	36.4%
No impact	22.8%
Increased fee arrears	19.2%
Increased demand for places	16.4%
Harder to recruit staff	8.8%
Harder to maintain quality of childcare	6.4%
Easier to recruit staff	2.0%
Total responses	250

Q10. If rising rent is an issue for you, who is your landlord? (please tick)

Landlord	Percent
Not an issue	60.1%
Private	17.6%
Church/diocesan	9.8%
Local authority	9.3%
Other (please specify below)	3.1%
Total responses	193

Q11. If staffing is an issue for you, which of the following is causing you the most concern? (please tick)

Cause of most concern	Percent
Not an issue	51.1%
Paying staff salaries	21.0%
Staff recruitment	10.8%
Training	7.5%
New Level 3 Diploma for the Children and Young People's workforce	4.8%
Staff retention	4.8%
Total responses	186

Q12. If sustainability is an issue for you, what is putting most financial strain on your service? (please tick)

Source of most financial strain	Percent
Not an issue	30.5%
Level of free entitlement funding	22.5%
Impact of the recession	17.5%
Families not being able to access help with childcare costs	14.5%
Local authority cuts	5.5%
Lack of business/management knowledge	5.0%
Rising rents	4.5%
Total responses	200

Q13. If implementing the free entitlement is an issue for you, what aspect of this is proving the most challenging? (please tick)

	Percent
Not an issue	49.0%
Level of funding	29.1%
Implementing the flexible free 15 hours entitlement for 3 & 4 year olds	16.8%
Implementing the free entitlement for eligible 2 year olds	5.1%
Total Responses	196

Q14. What impact do you feel the Early Years Foundation Stage (EYFS) has had on childcare in general?

	Percent
Positive impact	70.0%
No impact	12.6%
Negative impact	17.4%
Total responses	247

Q15. If you have had problems implementing the Early Years Foundation Stage (EYFS), what have these been? (please tick all that apply)

Problems implementing EYFS	Percent
Lack of time	51.6%
Not an issue	40.7%
Training	20.8%
Lack of support	14.9%
Lack of equipment	12.7%
Total responses	221

Q16. One of the gaps often identified by parents is for childcare outside normal working hours (i.e. before 8am, after 6pm and weekends). What ideas do you have on how this may be addressed in your borough?

The most popular responses to this question were:

- [Most popular suggestion] Encourage use of childminders – LA's should promote services and quality of childminders in their area, many already offer longer hours (however, beware of the impact on the childminder's own family)
- More after school/breakfast clubs
- Information/promotion of services – not good at the moment due to confusing and restrictive systems
- Parents' ability/willingness to pay the extra costs associated with out of hours childcare – suggestions were made both to offer more support to parents who work atypical hours and providers who offer flexible hours
- Planning permissions can restrict the hours a childcare provider can offer services

Q17. What helps you link with other providers and share best practice, at a borough level? (please tick all that apply)

	Percent
Borough provider network meetings	61.4%
Borough provider network newsletters	28.0%
Voluntary sector networks	11.9%
Exchange visits with other providers	30.9%
Joint training opportunities	46.2%
Mentors advising in the workplace	19.5%
Help with paying for cover when participating in networking and training activities	20.3%
Drop-in sessions and playgroups where providers meet	37.3%
Email forums/websites/information sent by SMS	26.3%
Other (please specify)	4.7%
Total Responses	236

Q18. How do you view your communications with your local authority? (please tick)

View of communications with local authority	Percent
Very good	24.9%
Good	43.3%
Mixed	26.9%
Poor	3.3%
Very poor	1.6%
Total responses	245

Q19. What support would you like from your local children's centre?

Respondents suggested a range of support:

- Many settings feel they get good support from their local Children's Centre
- Training
- Childminder access/meetings/networks
- Equipment/resources sharing
- Information about their services
- Promotion of e.g. childminder services

Q20. Is there anything else you would like to add, on how to help provider's links more with each other and engage in policy making?

The most common suggestions were:

- Network meetings and encouragement to providers to attend
- Support to develop policies
- More use of email/online resources – recognition of the fact that many childcare providers, especially childminders may not be able to attend meetings
- More local childminder drop-ins

Q21. What is the most important thing that local councillors can do for childcare in your borough?

The most common suggestions were:

- Promote the value of childminders (as equals to nurseries)
- Promote benefits of childcare
- Help with funding including to meet rent charges, for staff training, to replace toys and equipment
- Get to know the settings in their borough – go out and visit childcare providers

Q22. What is the most important thing any government could do for childcare?

The most common suggestions were:

- Allow top-ups for free early years entitlement or fund places to a realistic level
- Increase funding – to parents &/ providers
- Improve funding for staff training and training opportunities
- Reduce paperwork and restrict policy changes relating to childcare practice
- Make all funding direct to providers, including from tax credits