

Camden Childcare Sufficiency Assessment

2016

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Interpreting sufficiency

The supply of childcare is constantly changing. As such the figures presented in this report represent the best estimates at the time.

In determining whether Camden fulfils its sufficiency duty, this document uses the following definitions of childcare and sufficient childcare as set out in Chapter One of the Department for Children, Schools and Families publication *Securing Sufficient Childcare: Statutory guidance for local authorities in carrying out their childcare sufficiency duties* (2010).

What is childcare?

Childcare is defined in Section 18 of the Childcare Act 2006 as “any form of care for a child” including “education ... and any other supervised activity”.

The following are specifically excluded from this definition:

- education or activities provided by a school for a pupil during school hours, unless that pupil has not yet started Key Stage 1 (thereby including nursery and reception classes);
- care provided for a child by a parent, stepparent or person with parental responsibility; or any relative; or foster parent (local authority or private); or
- care provided by a children’s home, a care home, a hospital or a residential family centre, a young offenders’ institution, a secure training centre, or a secure care home within any of those establishments.

In the Childcare Act 2006, “early years provision” means childcare for a child aged from birth until the 31st August following the child’s 5th birthday and “later years provision” means childcare for a child from the 1st September following the child’s 5th birthday until the child reaches 18. (see sections 20 and 96(6) of the Act).

Childcare includes some “supervised” provision for under 18 year olds. This may overlap with local authorities’ duties under section 507B of the Education Act 1996, to secure sufficient leisure activities for 13-19 year olds.

Local authorities should regard childcare as any provision that is regular and reliable and provides children a safe place to be. It would not include, for example, before school or afterschool activity that was unsupervised or that was provided as a one-off activity.

What is sufficient childcare?

Local authorities are under a duty to ensure that there is sufficient childcare provision in their areas for two main purposes:

- Under Section 6 (1) of the Childcare Act 2006, the provision must be “sufficient to meet the requirements of parents in the local authority’s area who require childcare in order to enable them to:
 - a) take up, or remain in, work, or
 - b) undertake education or training which could reasonably be expected to assist them to obtain work.

This requirement is applicable to all children up to 1st September after they reach the age of 14. For children with a disability (as defined by the Disability Discrimination Act 1995), the requirement applies to children or young people until they reach the age of 18.

Under Section 6(2) of the Childcare Act 2006, in determining whether childcare is sufficient, the local authority must have regard to the needs of parents in their area

- a) for provision for which the childcare element of Working Tax Credit is payable; and
 - b) the provision of childcare that is suitable for children with a disability.
- Under Section 7(1) of the Childcare Act 2006, local authorities must secure free early years provision for all eligible children in their area. Regulations made under section 7 set out the type and amount of free provision and the age of children to benefit. These Regulations have been amended, with effect from September 2010, to increase the amount of free provision from 12½ hours a week for 38 weeks of the year to 570 (15 hours per week) hours a year over no fewer than 38 weeks.

In discharging both these duties, the local authority must have regard to relevant guidance that is issued by the Secretary of State. This document provides that guidance in relation to their overall sufficiency duties. The Code of Practice for Local Authorities on Delivery of Free Early Years Provision for 3 and 4 Year Olds sets out clear expectations in relation to the flexibility and quality of provision required to meet the free entitlement.

Section 6(1) of the Childcare Act 2006 places a duty on local authorities to secure the provision of childcare “so far as is reasonably practicable”.

In assessing what is “reasonably practicable”, the local authority may take into account:

- The state of the local childcare market, including the level of demand in a particular locality and the amount and type of supply that currently exists;
- The state of the labor market and the potential for increasing the number of people working in childcare;
- The resources available to, and capabilities of, childcare providers (resources means not just the available funding, but also staff and premises, and capabilities will include experience and expertise);
- The need to develop an effective, phased programme to meet the sufficiency duty; and
- The local authority’s resources, capabilities, and overall budget priorities.

If challenged, a local authority may be called upon to demonstrate how it has done all that it can to secure sufficiency, taking into account these constraints. Local authorities should work, over time, to reduce particular constraints, for example by building their own capabilities and expertise, and those of local providers.

“Reasonably practicable” allows some flexibility. What is practicable or impracticable in one time and place may not be in another. Local authority decisions to address gaps in childcare through one method, rather than another, based on what they regard as reasonably practicable, should be documented and published to allow scrutiny and challenge.

The sufficiency duty is phrased in general terms, and it will be for the authority to decide what is sufficient given the needs of parents in its area. A local authority may not be failing to fulfill the duty simply because an individual parent's particular need is not being met at a particular time, as it may be judged to be not reasonably practicable to do so. However, a local authority should not assume that it is not reasonably practicable to secure childcare that meets particular needs, such as childcare for a child with a disability or at atypical hours, just because it is difficult to do so.

Since the original, 2008 requirements of Childcare Sufficiency Assessments (CSAs) and the subsequent CSA of 2011, a change to the reporting cycles was introduced and local authorities are now required to report annually to elected council members on how they are meeting their duty to secure sufficient childcare, and to make this report available and accessible to parents.

1.1 National changes

The biggest change to the childcare market is the early year's national funding formula and the introduction of the 30 hours childcare place. The government's aim is to create a strong and sustainable early years funding system that is fair and transparent. The early year's national funding formula will allocate funding for the three- and four-year-old entitlement, both the existing universal 15 hour entitlement and the new 30 hour entitlement for working parents, on a formulaic basis for the first time. It is proposed the 30 hours of free childcare will be implemented nationally in September 2017, which will increase free childcare for some working parents, from 15 hours to 30 hours per week during term time.

1.2 Local priorities

In addition to the national changes there are local changes for Camden which will also have an effect on the supply of and demand for childcare:

- Supporting the local childcare market place through the implementation of the new funding formula and the introduction of the 30 hours free childcare places for some working parents.
- To assess the potential take up of the 30 hour free early education places against the supply of places that will be available for the September 2017 entitlement.
- Increase the number of take up of by eligible two years olds of free 2 year places.
- Enable families and children with SEND to access and benefit from the free early education and childcare that they are entitled to.
- To continue to commission the local voluntary and community sector organisations to provide out of school childcare after school and during school holidays.

2 Profile of Camden

2.1 Overall Size and Composition¹

Comprising almost 22 square kilometres in the heart of London, Camden is a borough of diversity and contrasts. Business centres such as Holborn, Euston and Tottenham Court Road contrast with exclusive residential districts in Hampstead and Highgate, thriving Belsize Park, the open spaces of Hampstead Heath, Parliament Hill and Kenwood, the youthful energy of Camden Town, subdivided houses in Kentish Town and West Hampstead and the relative deprivation of areas such as Kilburn, King's Cross and Gospel Oak.

The latest "official" estimate of Camden's resident population is 234,800 at mid-2014². This is the nationally comparable population estimate required for government returns and nationally comparable performance indicators. Of our neighbours, Barnet, Brent and Haringey have bigger populations; Westminster, Islington and the City are smaller. Camden is just a fragment of Greater London, occupying only 1.4% by area, but is home to 7% of London's employment and 2.7% of its population.

The mix of social and economic conditions in Camden is like nowhere else in the UK, though ONS describe the borough as "similar" to Westminster and the City, Hammersmith & Fulham, Islington or Kensington & Chelsea. Parts of Camden are very similar to parts of other London boroughs. Camden wards are described as metropolitan, either "prospering" or "multicultural": categories that are common in London but occur rarely elsewhere.

The 2011 Census finds that for residents aged 16+, over half (51%) are educated to degree level or equivalent (ranking 5th highest in England & Wales); while 13% have no qualifications. The population is ethnically diverse and consists predominantly of younger adults. 14% of Camden people have an illness or disability that affects day-to-day activities. Almost a third of households (32%) live in private-rented accommodation, while there are more households that own their home outright (17%) than own with a mortgage or loan (15%). 4% of people live communally (e.g. student halls, hostels, or care homes) rather than in households. 85% of household spaces are in purpose built or converted flats, just 15% are in houses (of which less than 2% are detached).

19% of households had more than 1.5 persons per bedroom – ranking 12th highest amongst local authorities in England & Wales. 41% of households contain one person living alone – a third of these are people aged over 65 years; of the remaining households, 31% contain household members who are from the same ethnic group and 26% of households contain people from different ethnic groups. 30% of Camden's usual residents were born outside the UK and European Union³. English is not the main language for 23% of people⁴, though the vast majority (86%) said they spoke English either 'very well' or 'well'.

¹ The 2011 Census provides the most comprehensive and detailed information about Camden and is supplemented by various survey estimates and administrative counts.

² Mid-2014 usual resident population estimates, based on the 2011 Census, published by ONS on 25 June 2015.

³ European Union as at 27 March 2011.

⁴ Usual residents aged 3+.

2.2 Population

Key findings⁵

- Camden's usual resident population at mid-2016 is projected to be 241,000.
- The number of households in Camden at mid-2016 is projected to be 106,600.
- Between mid-2016 and mid-2031: Overall population is forecast to grow by 31,500 to 272,500 (+13.1%).
- By age, the largest changes are in the older age groups:
 - 45-64: +12,800 (+27%)
 - 65-74: +4,400 (+28%)
 - 75+: +7,300 (+59%)
- The number of Camden households is projected to grow by 18,800 to 125,400 by 2031 (+17.6%)

Under 5's 2016 / 2017⁶ Live birth data (September 2016)

Age groups	0	1	2	3	4
Camden	1,343	2,628	2,535	2,542	2,532
Kilburn					
Fortune Green	96	122	155	142	128
Frognaal and Fitzjohns	78	178	161	162	155
Kilburn	91	170	181	179	158
Swiss Cottage	106	204	209	205	203
West Hampstead	99	152	141	125	121
Total	470	826	847	813	765
Euston					
Camden Town with Primrose Hill	58	162	116	128	151
Regent's Park	72	135	120	154	157
St Pancras and Somers Town	88	184	184	169	181
Total	218	481	420	451	489
Kentish Town West					
Belsize	110	237	210	186	213
Gospel Oak	81	138	137	137	151
Hampstead Town	78	125	144	138	140
Haverstock	72	166	149	179	141
Total	341	666	640	640	645
Kentish Town East					
Cantelowes	61	148	126	136	115
Highgate	39	116	114	120	109
Kentish Town	81	124	144	139	138
Total	181	388	384	395	362
Kings Cross					
Bloomsbury	16	54	46	51	44
Holborn and Covent Garden	65	107	107	102	113
King's Cross	52	106	91	90	114
Total	133	267	244	243	271

⁵ GLA 2015 Round of Projections (Camden Development, Capped AHS), Greater London Authority, © GLA 2016.

⁶ Live birth data 2016 - Central and North West London NHS Foundation Trust

Population Change for Camden⁷

Year				Natural	Net	Net	Forecast net
to mid-	Population	Births	Deaths	Change	Migration	Change	Dwelling change
2015	238,654	2,754	1,056	1,698	2,124	3,822	1,541
2016	240,962	2,803	996	1,808	501	2,308	1,068
2017	244,299	2,855	1,002	1,853	1,484	3,337	1,549
2018	247,260	2,898	1,008	1,891	1,070	2,961	1,373
2019	251,378	2,950	1,016	1,934	2,183	4,118	1,910
2020	254,598	2,987	1,024	1,963	1,257	3,220	1,660

2.3 Age and Gender

Camden's demographic profile corresponds to a typical metropolitan city with a university presence: a large proportion of students and younger adults, relatively few children and older people compared to the national average: 42% of residents are aged under 30, 69% are aged under 45. 18% of the population are children and young people aged under 18. The average age in Camden is 36.5 years, compared to 36.3 years in London and 40.2 years nationally. There are more older women than older men, marginally more boys than girls. The working-age (16-64) population is relatively even, but with slightly more women (37%) to men⁸

2.4 Cultural Diversity

Camden's population is ethnically diverse. In 2011, 34% of Camden residents were from Black or minority ethnic groups⁹ (increased from 27% in 2001). A further 22% are non-British White residents including Irish and others originating mainly from English speaking countries in the new world, as well as from Eastern Europe and beyond. In 2013-14 the top 5 origins for Camden residents requesting National Insurance numbers to work in the UK were from Italy (15%), France (11%), Spain (10%), Australia (5%) and USA (5%)¹⁰.

According to the 2011 Census ethnic group categorisation, Bangladeshis form the largest minority group in seven Camden wards; Black African the largest minority in six, Other Asian in four and Chinese in one. In all wards at least 20% of the population is from black and minority ethnic groups; there are no wards in Camden where White groups form a minority.

Camden's largest communities with a distinctive cultural identity are the Bangladeshi, Black African and Irish communities, followed by Chinese and Indian. In common with other inner London boroughs, there are small but growing communities of migrants who are refugees or seeking asylum, as well as migrants resulting from EU enlargement.

⁷ GLA Intelligence, © 2016

⁸ GLA 2014 Round "Camden Development, Capped AHS" for mid-2015

⁹ All ethnic groups other than White (i.e. White British; White Irish; White Gypsy or Irish Traveller; or White Other).

¹⁰ DWP National Insurance Number registrations by nationality 2013-14 (via London Datastore)

According to the 2011 Census, 60% of Camden residents were born in Britain or Ireland. Of the remainder, 11% were born in other EU countries¹¹ and 30% from elsewhere. After England, more Camden residents were born in the United States, Bangladesh, the Republic of Ireland, France, Scotland, Australia, Italy, Germany and Somalia than any other individual country in the world. In 2013 there were 2,766 births to Camden-resident women: 39% of the births were to mothers born in the UK; 20% to those born in Middle East and Asia; 14% in the EU, 11% in Africa, 10% in the rest of the world and 5% in non-EU Europe¹². GLA ethnicity projections forecast a small rise in the proportion of people from non-White ethnic groups, from under 35.2% in 2014 to 37.3% in 2031. Growth is projected in Chinese, Other Asian, Other Black and Indian groups¹³.

Language spoken¹⁴ was recorded for the first time in the 2011 Census. In Camden, after English, the most commonly spoken languages were Bengali (13%); French (8%); Spanish (6%); Italian and Somali (5%); German, Arabic, Portuguese and Polish (4%). Meanwhile in Camden schools, Camden-resident children speak 145 languages and dialects. The most widely spoken languages are: Bengali/Sylheti with 3,200 speakers; Somali with 1,500; Albanian with 900 and Arabic with 800; French, Spanish and Portuguese with more than 250 speakers¹⁵.

2.5 Social Deprivation

Every part of Camden has areas of relative affluence alongside areas of relative poverty. On the average rank summary measure for local authorities, the Indices of Deprivation 2010¹⁶ ranks Camden among the 55 most deprived districts in England. The most deprived area in Camden (found in Gospel Oak ward) is among the 7% most deprived areas in England. By contrast, Hampstead Town ward has the least deprived areas in Camden, where 5 out of the 7 LSOAs are among the 25% least deprived LSOAs in England

2.6 Child Deprivation¹⁷

Income deprivation affecting children index (IDACI 2015)

- 14 LSOAs in Camden fall within the 5% most deprived LSOAs in England.
- 32 LSOAs are within 10% most deprived (24% of Camden LSOAs)
- Children are much more likely to live in poverty than the general population.
- Top 5 most deprived wards
 1. St Pancras & Somers Town
 2. Kilburn
 3. Haverstock
 4. Regent's Park
 5. Gospel Oak

¹¹ 8% were from EU as constituted on Census Day, 29 April 2001 and a further 3% from EU Accession countries joining between April 2001 and March 2011.

¹² ONS Vital Statistics 2013.

¹³ GLA 2012 Round-based Ethnic Group Projections, "SHLAA"

¹⁴ ONS 2011 Census table QS204. All people aged 3+.

¹⁵ Camden Schools Language Survey 2013-14

¹⁶ CLG English Indices of Deprivation, 2010 - based on Lower-layer Super Output Area (LSOA) geography

¹⁷ Indices of Deprivation 2015, © DCLG, 2015.

2.7 Economic inactivity/worklessness

27.6% of Camden's working age population were economically inactive in Q1 2016¹⁸. In Camden, higher levels of economic inactivity are contributed to by large numbers of students¹⁹ and those looking after home/family. Up to Q3 2011 the rate had been fairly stable, but has been much more volatile in the last two years. As with the employment rate, small sample size in the APS and wide confidence intervals make fluctuations more likely, and make firm comparisons with other London boroughs problematic. Camden's economic inactivity rate, though, is higher than Central London, Greater London and Great Britain (23%). Camden has a higher proportion of economically inactive people who would like to have a job (44%); compared to Central London (31%), (31%), London (27%) and Great Britain (25%)²⁰. The proportion of claimants on out-of-work benefits is higher in Camden's most deprived wards. The wards with the highest JSA claimant (unemployment) rates in June 2015 were Kilburn (4.0%), St Pancras and Somers Town (3.8%) and King's Cross (3.1.). The overall rate for Camden was 2.2%. These wards are among the most deprived and have large ethnic minority populations. Hampstead Town has the lowest rate (0.7%)²¹. In the year to June 2015, the number of JSA claimants has fallen in every ward in Camden. Gospel Oak has seen the largest fall, down 95 (- 42%).

2.8 House prices and rents²²

Property prices in Camden are far higher than the London average. Average prices in Camden peaked at more than £854,000 in April 2016 before falling back to just under £810,000 in June 2016.

Average prices in Camden had peaked in April 2016 at £854,895 but fell to £809,804 in June 2016.

Camden average house prices are 1.7 times higher than the Greater London average and 3.6 times higher than the England & Wales average. Average house prices in Camden are now 66% higher than in January 2008 (before the property crash), compared to a 58% rise in London as a whole and 19% nationally 16%. House sales peaked in April 2016 at 365, much higher than in previous months and the long-term average of 220.

Private sector rents are much higher in Camden than London as a whole. In March 2016 (latest figures available) the mean monthly private sector rent for a two bedroom flat in Camden was £2,239 (£554, 33% higher than for London as a whole), while a three bedroom flat was £3,437 (£1,248, 57% higher). Over the year to March 2016, mean rents for most sizes of property in Camden have risen, however, a single room only rent has fallen 9% to £760 and rents for the largest (4+ bedrooms) has also fallen by 12% to £4,656. All other property sizes have seen increases: studios (+3% to £1,146); 1 bedroom (+3% to £1,612); 2 bedroom (+8% to £2,239); and 3 bedroom (+11% to £3,437)¹⁷

¹⁸ Annual Population Survey (ONS). Margin of error is +/-3.5%. From NOMIS.

¹⁹ 24,300 students live in Camden, more than in any other London borough. Higher education students, by residence, HESA 2012-13 (Higher Education Statistics Agency).

²⁰ ONS Annual Population Survey Q4 2014. Margin of error is +/- 7.0%. From NOMIS.

²¹ "Unemployment in Camden", LB Camden.

²² Camden Business and Employment Bulletin August 2016

3 Supply of childcare

Assessing the volume of childcare is complex. Childcare can be broken down by location, type of provider (voluntary/private/maintained sector childminder/nursery/children’s centre/community nursery), type of childcare (full/part-time daycare/after school/holiday) age range (under five, four to eight years, over eight years) etc. The number of places that Ofsted register providers for indicates the maximum number of places available, however not all providers choose or are able to make these places available. Childcare for children over eight years does not have to be registered, although having the childcare registered on the voluntary childcare register means that working parents can claim tax credits towards the cost of childcare.

Childcare places can be broken down according to types of provider, whether places are full time or part time and by the age of children accommodated. This section provides a summary of the total number of childcare places across Camden. The actual number of providers and therefore the number of places changes frequently and therefore all numbers presented in this document are approximate.

3.1 Supply of childcare for children aged 0 to five years

Total number of providers and places²³

Camden’s central database identifies approximately 261 childcare providers in Camden supplying approximately 5164 childcare/nursery education funded places for children aged birth to five years.

Table one summarises the number and type of providers supplying childcare for children aged birth to five years as of summer 2016.

Table 1 Number of providers and places 2016

Type of provider	2016 (Summer)			
	Providers		Places ²⁴	
	No.	%	No.	%
Childminders	135	52%	383	7%
Private/independent/workplace sector settings	49	19%	1827	35%
Maintained nursery classes in schools offering NEF only	34	13%	933	18%
Voluntary sector childcare settings	24	9%	683	13%
Independent nursery providers offering NEF only	9	3%	573	11%
LA day nursery and children centres	10	4%	765	15%
Total	261	100%	5164	100%

²³ A new Early Years Foundation stage (EYFS) came into effect in September 2012. This changed the way Ofsted register providers on the Early Years Register: most providers now do not have conditions of registrations as the requirements they must meet are set out clearly in the revised EYFS

²⁴ NEF figures taken from the summer 2016 headcount. All other place figures taken from the FIS database August 2016

Locality breakdown by ward:

- **Kilburn locality** – West Hampstead, Fortune Green, Swiss Cottage, Frognal and Fitzjohns and Kilburn
- **Euston locality** – Camden Town with Primrose Hill, St Pancras and Somers Town & Regents Park.
- **Kentish Town West locality** – Belsize, Gospel Oak, Hampstead and Haverstock
- **Kentish Town East locality** – Highgate, Kentish Town & Cantelowes
- **Kings Cross & Holborn locality** – Holborn & Covent Garden, Kings Cross and Bloomsbury

Childminders

There are 138 registered childminders of these 135 supply 383 childcare places for children 0-8 years. The remaining 3 childminders only offer childcare for children aged 5 – 8 years of age.

Breakdown of places and childminders per locality:

- Kilburn locality - 84 places supplied by 29 childminders
- Euston locality – 81 places supplied by 31 childminders
- Kentish Town West locality - 103 places supplied by 36 childminders
- Kentish Town East locality - 93 places supplied by 31 childminders
- Kings Cross and Holborn locality - 22 places supplied by 8 childminders

Since September 2015 to 31st August 2016, 9 new childminders have been registered in Camden. Over the same time period 18 childminders have either resigned or have been cancelled by Ofsted. This has led to a net loss of 9 childminders. The number of childminding places has decreased from 397 to 383, a net loss of 14 places.

Table 2 - Place breakdown by locality for childminders

	Birth to the end of the EYFS	Registered places Under 1 Years	Registered places 1 year to the end of EYFS	Registered places 1 to 8 Years
Kilburn locality	2	28	31	23
Euston locality	1	29	26	25
Kentish Town West locality	1	35	43	24
Kentish Town East locality	2	29	30	32
Kings Cross & Holborn locality	0	6	10	6
Total - September 2016	6	127	140	110
Total - August 2015	0	137	155	105
Net/loss gain 2014 to 2015	6	-10	-15	5

Day care providers²⁵ and places

There are approximately 83 day care providers supplying a total of approximately 3275 childcare places.

Breakdown of places and providers per locality:

- Kilburn locality - 1039 places supplied by 23 providers

²⁵ Does not include childminders, independent providers of NEF or LA nursery classes

- Euston locality – 558 places supplied by 14 providers
- Kentish Town West locality - 629 places supplied by 18 providers
- Kentish Town East locality - 614 places supplied by 18 providers
- Kings Cross and Holborn locality – 435 places supplied by 10 providers

Childcare places by age – group providers²⁶

There are 508 daycare places for children from birth to two years of age, of these 173 places are registered for children aged under one year.

There are 2767 places for children from the age of two years to the end of the Early Years Foundation Stage (EYFS) of which:

- 397 are for children aged two to three years.
- 1472 are for children aged two years to the end of EYFS.
- 734 are for children aged three years to the end of EYFS.

The remaining 164 day care places are for children from birth to the end of the EYFS.

Table 3 - Registered place breakdown by locality

	Under 1 Years	Birth to under two	1 Year To The End Of The EYFS	2 3 Years	2 Years To End Of EYFS	3 To End Of EYFS	Birth To The End Of The EYFS	Total
Kilburn locality	74	118	40	113	451	183	60	1039
Euston locality	33			40	361	104	20	558
Kentish Town West locality	6	83	16	138	164	222		629
Kentish Town East Locality	33	30		44	356	91	60	614
Kings Cross & Holborn locality	27	48		62	140	134	24	435
Total - September 2016	173	279	56	397	1472	734	164	3275
Total - August 2015	81	444	0	406	1754	757	101	3543
Net/loss gain 2014 to 2015²⁷	92	-165	56	-9	-282	-23	63	-268

From September 2015 to 31st August 2016, 3 new day care providers have been registered in Camden. Of these providers 2 (67%) were voluntary sector providers and 1 (33%) were private sector providers. Over the same time period 9 daycare providers have either resigned or relocated to another borough. This has led to a net loss of 6 daycare providers. The number of childcare places has decreased from 3543 to 3275, a net loss of 268 places. The change in the number of under 2 places has in part been affected by a review of Camden Sure Start. The Camden Sure Start - a new approach to early years services report recommended an increase in the number of places available for disadvantaged children and parents in receipt of childcare tax credits and a reduction in the number of subsidised childcare places that are

²⁶ Does not include childminders, independent providers of NEF or LA nursery classes

²⁷ Overall places might not have been lost or gained, the provider might have altered their age group registration

available for two year-olds and that places for children under the age of two would no longer be able to be provided. This change in places in local authority childcare provision was implemented in April 2016.

Home carers

Camden has 207 registered home childcarers. This is a decrease of 2 registered home childcarers since September 2015. Details on the numbers of registered places and the numbers of Camden children using home-based childcare are not available and therefore it is not possible to assess the impact of home-based childcare on sufficiency.

Two-year old scheme

The current two year old scheme provides free part time childcare places for eligible families.

Eligibility

- meets the criteria for free school meals; or
- receives working tax credits and your household income is less than £16,190; or
- child is looked after by the local authority; or
- have left care through special guardianship or an adoption or residence order; or
- have a current statement of special educational needs (SEN) or an education, health and care (EHC) plan; or
- receive the disability living allowance or
- receive support from the National Asylum Support Service (NASS) through part 6 of the Immigration and Asylum Act
-

Table 4 - No of children by provider type claiming the 2 YO Scheme funding 2015-2016

Type of Provider	Autumn 15/16	Spring 15/16	Summer 16/17
Voluntary provider	202	169	156
Private provider	89	81	78
Childminders	13	18	20
Local Authority Nursery/Children Centre	241	211	191
Total	545	479	445

Nursery Education Funding

Nursery Education Funding (NEF) provides an entitlement of up to 15 hours of free childcare for a minimum of 38 weeks a year for three and four year olds. Camden Council offers an additional free 15 hour nursery places for three and four year olds in the maintained nurseries and nursery classes in primary schools.

Table 5 -Number of children by provider type claiming NEF

Type of Provider	Autumn 15/16	Spring 15/16	Summer 16/17
Voluntary provider	145	243	339
Private provider	481	700	827
Independent provider	550	570	563
Childminder	10	14	17
Local Authority Nursery	263	393	458
Local Authority School	1114	1175	1197
Total			

3.2 Opening hours

Daycare providers

In Camden all of the day care providers operate within Ofsted's definition of a full time provider. Some full time providers offer part time places within their provision.

40 (59%) of the providers open at 8.30am or earlier and 44 (53%) close at 5.30pm or later. 46 (55%) providers were open for 9 hours or more.

Childminders

Of the 135 registered childminders, 129 (96%) of childminders offer full time provision from Monday to Friday. 10 childminders offer full time provision at the weekend, of those 6 childminders offer provision on both Saturday and Sunday.

124 (92%) of childminders open at 8.30am or earlier. 113 (84%) of childminders close at 5.30pm or later. 119 (84%) childminders were open for 9 hours or more.

3.3 Cost of childcare – daycare providers

It has been very difficult to assess the cost of childcare to the parent because different providers express costs differently – per hour, per session, per day or half day, per term and so on. Many providers had 5 or more different price bandings. These bandings would be different in accordance with the age of the child and hours the child was attending e.g. children under 2, children 2 3 years and children over 3 years. Each year the Family and Childcare Trust conducts a survey of local authority Family Information Services (FIS) to find out about childcare costs in Britain. The childcare costs survey asks local authorities to estimate an average price that parents pay for different forms of childcare. It is important to note that the survey does not look at what providers estimate their services actually cost which is likely to be a different amount because of complex systems of cross-subsidy and the range of business models.

For the purpose of the report the Family and Childcare Trust looks at nursery and childminder provision based on 25 hours childcare per week, childminder after school pick-up arrangements and after school clubs based on 15 hours childcare per week.

Table 6 details the regional and national report findings

Table 6 - Average weekly childcare costs by region and nation - 2016²⁸

Region/Nation	Nursery	
	Under 2 years	Over 2 years
London	£158.73	£148.74
England regional average	£118.13	£113.06
Britain average of regions and nations	£116.77	£111.88

Cost of childcare – childminders

Data on costs for childminders was gathered in the termly provider survey and represents data on 89 childminders (66%) who agreed to share their costs. Childminding pricing structure tends to be less complex than day care providers. Childminders will charge per hour, per week or per month. The majority of childminders have given an hourly rate (97%)

The average cost per hour of a childminder in Camden is £6.71. The lowest hourly rate is £5.00 and the highest hourly rate is £10.00.

3.4 Vacancies – day care providers

Estimating vacancies is difficult as the situation can change rapidly and because of this providers do not always report vacancies accurately. Vacancy data from daycare providers was collected through the termly provider survey (September 2016). Most providers reported having no vacancies. Most providers also reported that vacancies were filled almost immediately. Overall across childcare providers they reported an average of an 81% occupancy rate

Vacancies - childminder

Childminders are encouraged to report their vacancies on the Tribal database held centrally by Camden. This data shows that, of the 135 childminders registered for children aged five or under, 93 (71%) childminders are recorded as having a vacancy. The average vacancy rate i.e. the percentage of registered places that are vacant is 61%.

Kilburn locality – Of the 29 registered childminders, 20 of the childminders (69%) have a vacancy. Of the 84 registered places, 44 (52%) places are vacant

Euston locality – Of the 33 registered childminders, 19 (61%) of the childminders have a vacancy. Of the 81 registered places, 49 (60%) places are vacant

Kentish Town West locality – Of the 37 registered childminders, 28 of the childminders (78%) have a vacancy. Of the 103 registered places, 60 (58%) places are vacant

Kentish Town East locality – Of the 31 registered childminders, 19 of the childminders (61%) have a vacancy. Of the 93 registered places, 37 (40%) places are vacant

Kings Cross and Holborn locality – Of the 8 registered childminders, 7 of the childminders (88%) have a vacancy. Of the 22 registered places, 21 (95%) places are vacant

²⁸ 2016 Childcare Survey - Family and Childcare Trust

3.5 Supply of childcare for children aged four to eight years – group providers

Total number of providers and places

There are approximately 29 childcare providers in Camden supplying approximately 1734 places for children aged between four and eight years. Of the 29 providers, 11 offer both holiday and after school care. 8 provide holiday scheme only and 9 provide after school care only.

Table 6 - Number of providers by sector

Provider sector	Providers	
	Number	Percentage
Voluntary	18	64%
Private/workplace	10	36%
Total	34	100%

Table 7- Group providers and type of provision by locality

Locality	After school	Holiday scheme	total no of places	No of providers
Kilburn	191	226	417	6
Euston	110	237	347	6
Kentish Town West*	204	168	372	5
Kentish Town East	174	238	412	8
Kings Cross	80	106	186	4
Total	759	975	1734	29

* There has been a decline in places in Kentish Town West due to a 150 holiday scheme and after school place provider being no longer registered on the Ofsted register

Subsidised places

Camden commissions the local voluntary and community sector organisations to provide out of school childcare after school and during school holidays. Conditions of grant ensure that providers have a fee structure in place that provides subsidised childcare for low income working families. Camden also fund free places for children who are assessed as being "Children in Need" (CIN) and disabled children eligible for short breaks.

Table 8 - Locality of subsidised places

Name of organisation	Premises	Localities (Premises) and localities of schools linked to	Schools linked to
Coram's Fields	Coram's Fields	Kings Cross and Holborn	St Albans, George the Martyr, Christopher Hatton, Argyle
Adventure Play 4 All	Plot 10	Euston	St Mary's & St Pancras, Edith Neville and St Aloysius
PACE	Fairfield	Euston	Our Lady's, St Michael's & Richard Cobden, Christchurch (NW1), Netley
Maiden Lane Community Centre	Camden Square and Maiden Lane	Kentish Town East	Brecknock & Torriano
Adventure Play 4 All	Talacre Action Group	Kentish Town West & Euston	Rhyl, Carlton & Holy Trinity & St Silas
Adventure Play 4 All	Three Acres	Kentish Town West	The Rosary, St Dominic's & Fleet
Adventure Play 4 All	Winchester Project	Kentish Town West and Kilburn	Holy Trinity (NW3)
Hampstead Community centre	Hampstead Community Centre	Kentish Town West & Kilburn	Fitzjohns, New End & Hampstead Parochial
PACE	Fortune Green	Kilburn	Beckford, Emmanuelle, Eugene De Mazonod, St Mary's (NW6)

Breakfast Clubs**Table 9 –Breakfast clubs in primary schools**

Locality	Number of breakfast clubs in primary schools	Number of breakfast clubs in secondary schools
Euston	11	1
Kings Cross & Holborn	4	0
Kentish Town East	6	4
Kentish Town West	6	0
Kilburn	7	1
Total	34	6

Childminders

The total number of registered childminders places for children aged up to eight years of age is 271. Childminders can register either for children aged one to eight years or for children aged five to eight years. There are approximately 135 registered childminders providing a total of 271 places for children aged between five and eight years.

3.6 Opening hours - group providers

The majority of after school clubs opened from 3.30pm to either 5.30pm or 6.00pm. The majority of holiday schemes offered provision from 8.00am to 6.00pm.

Opening hours - childminders

75% of the childminders with over 5 places offered childcare after 6.00pm with 6 childminders offering childcare up to 8pm. 33 of the childminders with over 5 places offered childcare before 8am

3.7 Costs - group providers

The average cost of an after school place for non-subsided working parents is £10.60 per hour or £44.64 per week. For subsided parents e.g. those earning under £35,000, the average cost are £4.92 per hour or £24.58 per week.

The average cost of an extended day holiday place for non-subsided working parents is £24.25 per day. For subsided parents the average cost of an extended day holiday place is £15.50 per day.

Cost of childcare – childminders

Data on costs for childminders was gathered in the termly provider survey and represents data on 94 childminders (65%) who agreed to share their costs. Childminders will charge per hour, per week or per month. The majority of childminders have given an hourly rate (94%)

The average cost per hour of a childminder in Camden is £6.67. The lowest hourly rate is £5.00 and the highest hourly rate is £10.00.

3.8 Vacancies - group providers

Estimating vacancies is difficult as the situation can change rapidly and because of this providers do not always report vacancies accurately. Camden monitors the take up of subsided places in out of school providers and many of the out of school providers have vacancies within their subsided places.

Vacancies - Childminders

The vacancy rate for these childminders is 34% (or approximately 91 places). There are approximately 135 registered childminders providing a total of 271 places for children aged between one to eight years.

Table 11 - Childminders vacancies by localities for places for one to eight years Camden wide

Locality	Number of registered places	No. vacancies	% of places vacant
Kilburn locality	54	14	26%
Euston locality	65	26	40%
Kentish Town West locality	77	23	30%
Kentish Town East locality	62	18	29%
Kings Cross & Holborn locality	13	10	77%
Total	271	91	34%

3.9 Voluntary childcare register

The Ofsted voluntary childcare register (VCR) is in place to ensure that children and young people are cared for in a safe environment. It allows providers who do not need to register to register by choice. These include providers who:

- provide care for children aged eight and over
- provide care in out-of-school clubs, holiday clubs, play schemes, playcentres and open access play provision
- offer activity based care (i.e. sports, drama, language or arts clubs)

The care must be:

- provided for at least two hours a day

- joined up to the beginning or end of the school day such as a breakfast club or after school club
- part of an arrangement whereby care is provided for a continuous period of at least two hours

Camden has eight providers that are registered on the VCR to provide services for school aged children after school or in the school holidays.

4 Action points

The following action points have been identified based on this assessment:

- Monitor the take up of 30 hours childcare offer ensuring that there is awareness of the different demographics of geographic areas that might affect the distribution of places.
- Plan for the implementation of the new funding model and 30 hours of fee childcare for some working parents with schools, maintained nurseries, private, voluntary and independent providers and childminders. Ensuring that they are in the position to make best use of this funding source to meet the demand from Camden parents.
- Ensure that families and children with SEND can access and benefit from the free early education and childcare that they are entitled to.
- Develop systems for providing information to parents/providers regarding the 30 hours childcare offer that incorporates the use of website and social media.
- Empower and inform providers so they are confident and able to be a source of information for parents about the 30 hours childcare offer
- Support high quality childminders in the borough to develop and promote their offer in light of the requirement for 30 hours childcare offer.
- Ensure that the families of children eligible for the 2 year old childcare places are aware of their entitlement and given information and support to help them access a two year place.
- To continue the commitment to a balanced offer of universal and targeted early education and childcare, with a focus on providing early education and childcare to the most disadvantaged.