

# Basis

SOUTH TYNESIDE  
CHILDCARE  
SUFFICIENCY  
ASSESSMENT 2019

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**Appendices**

**Appendix I:** CSA Provider Survey Analysis 2019

**Appendix II:** Action Plan notes

## A. Overall assessment and summary

Nearly all (97%) childcare in South Tyneside is **good** or **outstanding**. This means that children in South Tyneside can access good or outstanding childcare wherever their childcare is situated and regardless of deprivation characteristics.

There is no evidence of unmet **demand** for early years or school-age childcare in South Tyneside, either currently or in the foreseeable future.

There was no evidence that parents found the **cost** of childcare unaffordable.

Local providers were consulted via an e-Survey.

Parents and carers were not consulted as part of this document because their views on childcare including demand and unmet demand (if any) will be sought as part of a scheduled survey in Summer 2020.

South Tyneside's Childcare Sufficiency Assessment was finalised during the emerging COVID-19 pandemic<sup>1</sup>. It is highly likely that the enforced closure of all childcare provision other than for critical workers and vulnerable children as from 24 March 2020 until further notice will have far-reaching consequences on the childcare sector in South Tyneside.

### Introduction

South Tyneside Council commissioned Basis Ltd to undertake a Childcare Sufficiency Assessment in August 2019.

The purpose of this document is to assist South Tyneside Council's Early Years team to ensure that there is sufficient childcare available to meet the needs of local families, as well as to meet the local authority's reporting responsibilities in respect of early years education and childcare, which is laid out in the document: **Early education and childcare: Statutory guidance for local authorities**, published by the Department for Education in June 2018.

This Guidance states that each local authority is responsible for determining the appropriate level of detail and geographical division in their report, as well as the date of publication.

The document should include information about the current and projected supply and demand of childcare for particular age ranges of children, and the affordability, accessibility and quality of provision; and details of how any gaps in childcare provision will be addressed.

### Ensuring sufficient childcare in South Tyneside

The Early Help Service at South Tyneside Council works closely with their local Preschool and Portage service, the maintained childcare and education sector as well as independent and voluntary sector providers to ensure there is sufficient childcare available to meet the needs of all local children, including:

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<sup>1</sup> March 2020

- children with special educational needs and disabilities;
- children from families in receipt of the childcare element of Working Tax Credit or Universal Credit;
- children with parents who work irregular hours;
- children aged two, three and four taking up free places;
- school age children; and
- children needing holiday care

The team pride themselves on being accessible to parents, with the Family Information Service providing a personal and timely service to all contacts. They have good relationships with local providers and are responsive to emerging challenges.

## Childcare Sufficiency Assessment Methodology

The findings in this Assessment have been drawn from a synthesis of three sources: statistical data tables supplied by South Tyneside Council and publicly available data; an analysis of consultation responses from Providers collected via an e-Survey (included as Appendix I); and feedback from South Tyneside officers in an Action Planning workshop (Action Plan notes included as Appendix II).

## Demand for early years education and childcare

There are 8,359<sup>2</sup> children under the age of five living in South Tyneside. These children may require early years education and childcare.

There are 12,083 children aged 5-11, and 4,892 children aged 12-14 living in South Tyneside. These children may require childcare before and after school, and/or during the school holidays.

There is no evidence of any likely changes in the population of local children.

In practice, many of the children with working or studying parents may not require formal childcare, as they may be looked after by relatives or parents managing their own work patterns to enable them to care for their own children.

## Demand for accessible childcare

In South Tyneside, 1,215<sup>3</sup> children aged 19 or under have an Education, Health and Care (EHC) plan. This is forecast to increase to 1,384 by July 2021, which includes an increase of 52 in the number of primary school children and of 114 secondary age children.

This forecast rise in the number of primary and secondary age children may have an impact on demand for suitable out of school places.

In the 2019-2020 academic year, the Council's Preschool and Portage service are projected to have received 246 referrals for children aged three or under, around two thirds of which were for three-year olds. The total figure is broadly in line with referrals for 2018-2019, which were 17% up on the previous

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<sup>2</sup> 2018 Mid-term ONS population projections for all child age groups

<sup>3</sup> July 2019 forecast

year. This may be an indication that the previous upward trajectory has stabilised, although further years' data will improve confidence in this trend. However, there is no evidence of a likely immediate increase in demand for three and under childcare places.

## Supply of early years education and childcare for children up to the age of 14 and up to 18 for disabled children.

There are 182 Ofsted-registered<sup>4</sup> early years and childcare providers in South Tyneside. There is a strong maintained sector, with 12 local authority-run children's centres offering childcare.

It is not possible to quantify the provision of providers for wrap around and holiday care for **school-age children** in South Tyneside, as parents access both Ofsted-registered provision and activities and clubs which do not require registration.

Whilst there is no current data of formal childcare available during **atypical hours** (outside 8am to 6pm on weekdays), Ofsted-registered childminders may be providing this in response to parental need.

All childcare settings in South Tyneside aim to be inclusive by offering care for children with special educational needs and disabilities. A small majority of providers (54%) responding to the providers' e-survey reported that they felt there was insufficient local childcare for children with special educational needs and disabilities, although this view did not reflect the reported experience of the specialist local authority teams. The Early Years team at South Tyneside therefore wish to explore this further in the Parental Survey scheduled for Summer 2020.

Looking at the geographical spread of **supply** of early years childcare, there appears to be a broadly consistent spread of settings with population density.

The proportion of eligible children taking up their funded early education entitlement (for at least some of the available hours) in South Tyneside compares favourably with England as a whole and the North East region.

## Coronavirus/ COVID-19 update

South Tyneside's Childcare Sufficiency Assessment was finalised during the emerging COVID-19 pandemic. It is highly likely that the enforced closure of all childcare provision other than for critical workers and vulnerable children as from 24 March 2020 until further notice will have far-reaching consequences on the childcare sector in South Tyneside.

## Acknowledgements

The team at Basis are very grateful for the contributions from local childcare providers as well as South Tyneside officers in the Early Help, SEND, data and finance teams who provided invaluable assistance throughout the project.

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<sup>4</sup> Derived from data supplied by South Tyneside Early Years team.



## B. Findings

### 1. Introduction

South Tyneside Council commissioned Basis Ltd to undertake a Childcare Sufficiency Assessment in August 2019.

The purpose of this document is to assist South Tyneside Council's Early Years team to ensure that there is sufficient childcare available to meet the needs of local families, as well as to meet the local authorities' reporting responsibilities in respect of early years education and childcare, which is laid out in the document: **Early education and childcare: Statutory guidance for local authorities**, published by the Department for Education in June 2018.

This guidance states that each local authority is responsible for determining the appropriate level of detail and geographical division in their report, as well as the date of publication.

The document should also include information about the current and projected supply and demand of childcare for particular age ranges of children, and the affordability, accessibility and quality of provision; and details of how any gaps in childcare provision will be addressed.

### 2. Ensuring sufficient childcare in South Tyneside

The Early Help Service at South Tyneside Council works closely with their local Preschool and Portage service, the maintained childcare and education sector as well as independent and voluntary sector providers to ensure there is sufficient childcare available to meet the needs of all local children, including:

- children with special educational needs and disabilities;
- children from families in receipt of the childcare element of Working Tax Credit or Universal Credit;
- children with parents who work irregular hours;
- children aged two, three and four taking up free places;
- school age children; and
- children needing holiday care

The team pride themselves on being accessible to parents, with the Family Information Service providing a personal and timely service to all contacts. They have good relationships with local providers and are responsive to emerging challenges.

### 3. Childcare Sufficiency Assessment Methodology

The Assessment was commissioned as a compilation of existing evidence supplemented by original field research; a consultation with local providers and a workshop with local authority officers.

The findings in this Assessment have been drawn from a synthesis of three sources: statistical data tables supplied by South Tyneside Council and publicly available data; an analysis of consultation responses from Providers collected via an e-Survey (Included as Appendix I); and feedback from South Tyneside officers in an Action Planning workshop (notes included as Appendix II).

The data tables provided by South Tyneside council included the providers' list; early years funded education financial data<sup>5</sup> and the schools census, which were amalgamated by the research team.

Population estimates are derived from publicly available 2018 Mid-term ONS population projections<sup>6</sup> and Ofsted registrations and grades from publicly available Ofsted data<sup>7 8</sup>. We consulted with local providers to understand their assessment of the local childcare market, their plans and their concerns.

In order to reach as many local providers as possible, from a range of settings, it was decided to use a self-completion methodology, via an e-Survey. The questions were developed in conjunction with the Council. In order to maximise response, the number of questions was limited to 10 and the survey was completed anonymously. The e-survey was disseminated by the client to all providers on South Tyneside internal lists by email on Monday 21<sup>st</sup> October 2019 with a close date of Friday 1<sup>st</sup> November 2019. 63 providers responded to the survey.

Once we had analysed the results of the survey and undertaken preliminary analyses of the data tables, we conducted a Childcare Sufficiency Action Planning Workshop.

The purpose of the workshop was to review and 'sense check' the findings to date and identify action areas to support the document development of the CSA and further activity to address identified gaps in childcare in South Tyneside.

Narrative context was identified for inclusion into the CSA document as well as Action Items for inclusion in the Draft Action Plan, included as Appendix II of this document.

## 4. Acknowledgements

The team at Basis are very grateful for the contributions from local childcare providers as well as South Tyneside officers in the Early Help, SEND Services, data and finance teams who provided invaluable assistance throughout the project.

## 5. Demand for childcare in South Tyneside

Evidence for actual and potential demand for childcare was drawn from four sources:

- i. Population statistics by age and Super Output Area, drawn from ONS 2018 mid-term estimates. Year-on-year changes in the ONS-estimated population suggest a low level of population change.
- ii. Data from the South Tyneside Education team (Education, Health and Care plans)

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<sup>5</sup> 2-year old financial data, EY Census and EY child list.

<sup>6</sup> [Mid-year population estimates 2018 and prior](#)

<sup>7</sup> [OFSTED Early Years Information](#)

<sup>8</sup> [OFSTED Schools Information](#)

- iii. Data from South Tyneside Preschool and Portage team (SEND data)
- iv. Feedback from South Tyneside officers at an Action Planning workshop held on 28<sup>th</sup> November 2019

## Evidence of demand from population statistics

These are the current numbers of children who may require childcare, drawn from projections based on the 2018 Office for National statistics (ONS) Mid-year estimates.

In practice, many of the children with working or studying parents may not require formal childcare, as they may be looked after by relatives or parents managing their own work patterns to enable them to care for their own children.

### Population of early years children

There are 8,359 children under the age of five living in South Tyneside. These children may require early years childcare.

Age	Number of children
Age 0	1609
Age 1	1594
Age 2	1825
Age 3	1631
Age 4*	1700

Table 1: Children aged four and under living in South Tyneside<sup>9</sup>.

\* Some four-year-olds will have started reception

### Population of school age children

There are 12,083 children aged 5-11, and 4,892 children aged 12-14 living in South Tyneside. These children may require childcare before and after school, and/or during the school holidays.

Age	Number of children
Age 5	1716
Age 6	1813
Age 7	1732
Age 8	1723
Age 9	1719
Age 10	1742
Age 11	1638
Age 12	1673
Age 13	1630
Age 14	1589

Table 2: Children aged between five and 14 living in South Tyneside<sup>10</sup>.

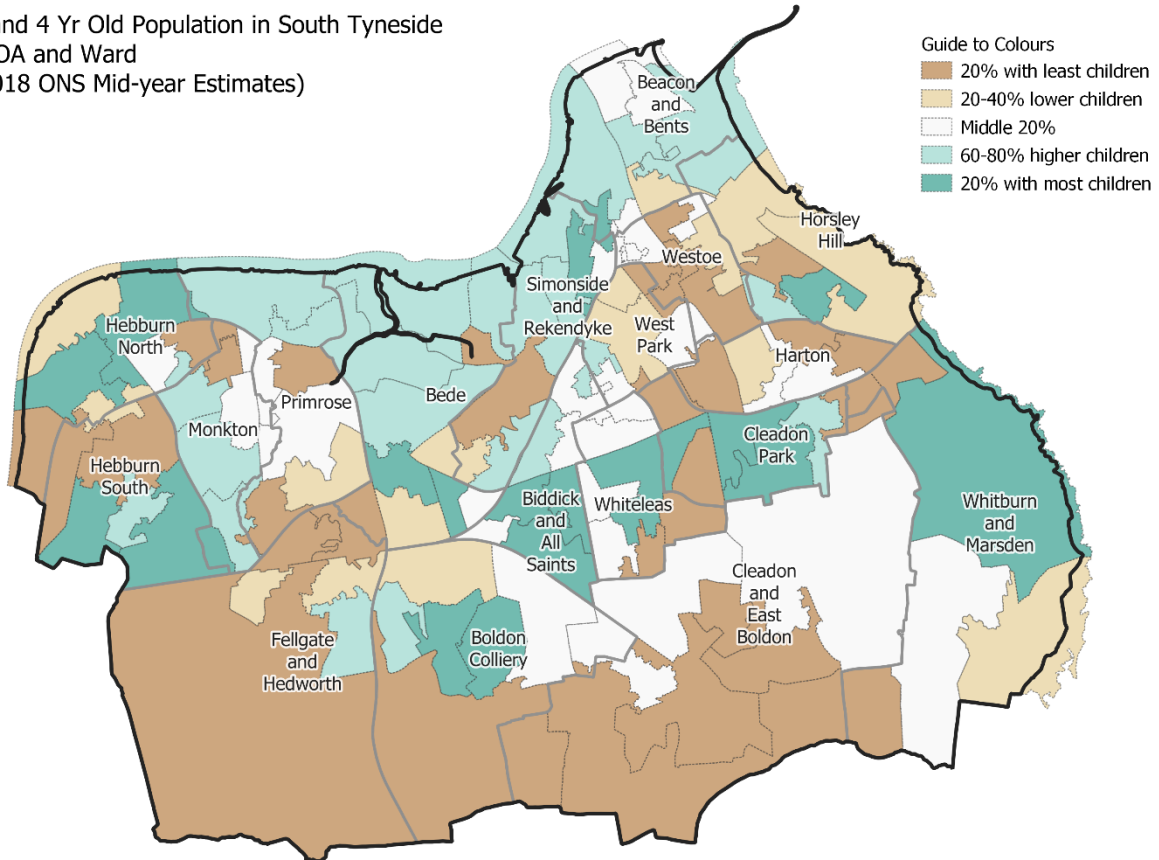
<sup>9</sup> 2018 Mid-term ONS population projections

<sup>10</sup> 2018 Mid-term ONS population projections

## Maps showing the early years population.

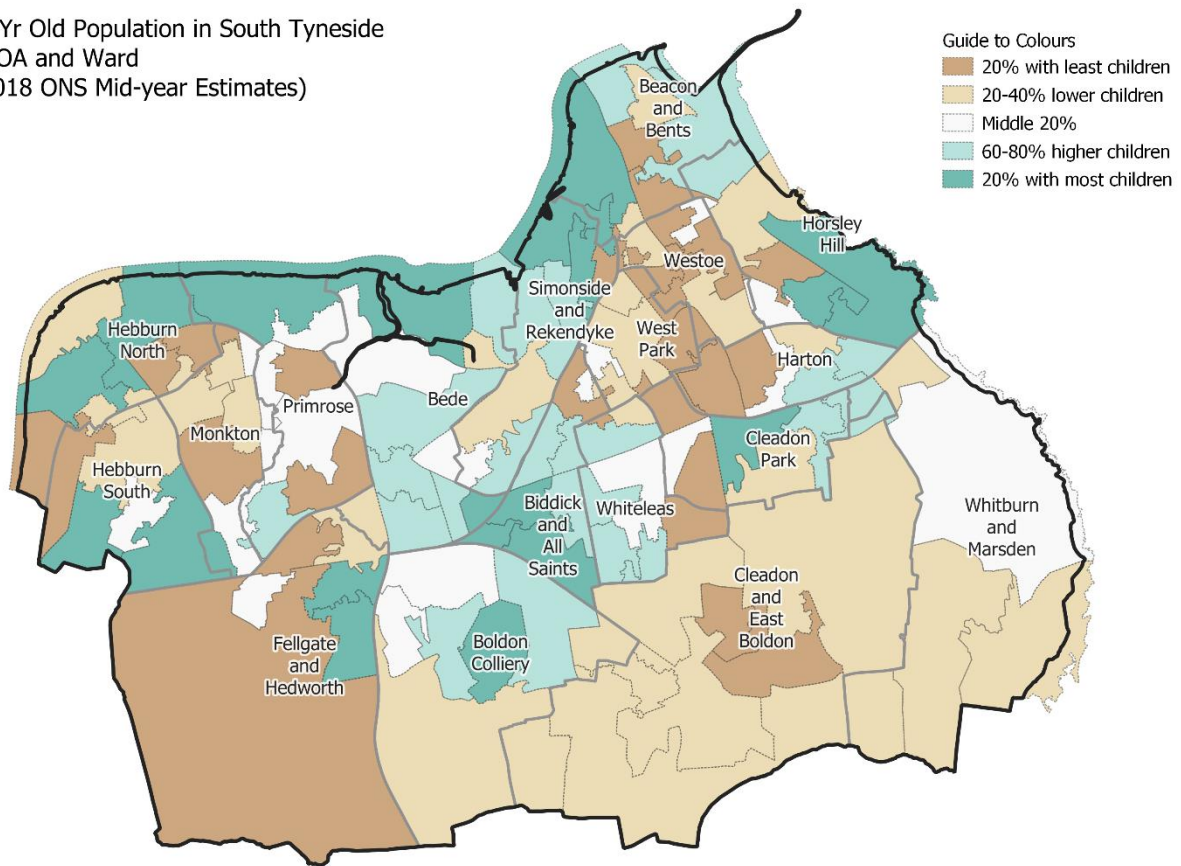
These maps show the geographical distribution of preschool children living each of South Tyneside's wards and Lower Super Output areas (LSOA), by age group, drawn from the 2018 Mid-term ONS population projections.

3 and 4 Yr Old Population in South Tyneside  
LSOA and Ward  
(2018 ONS Mid-year Estimates)



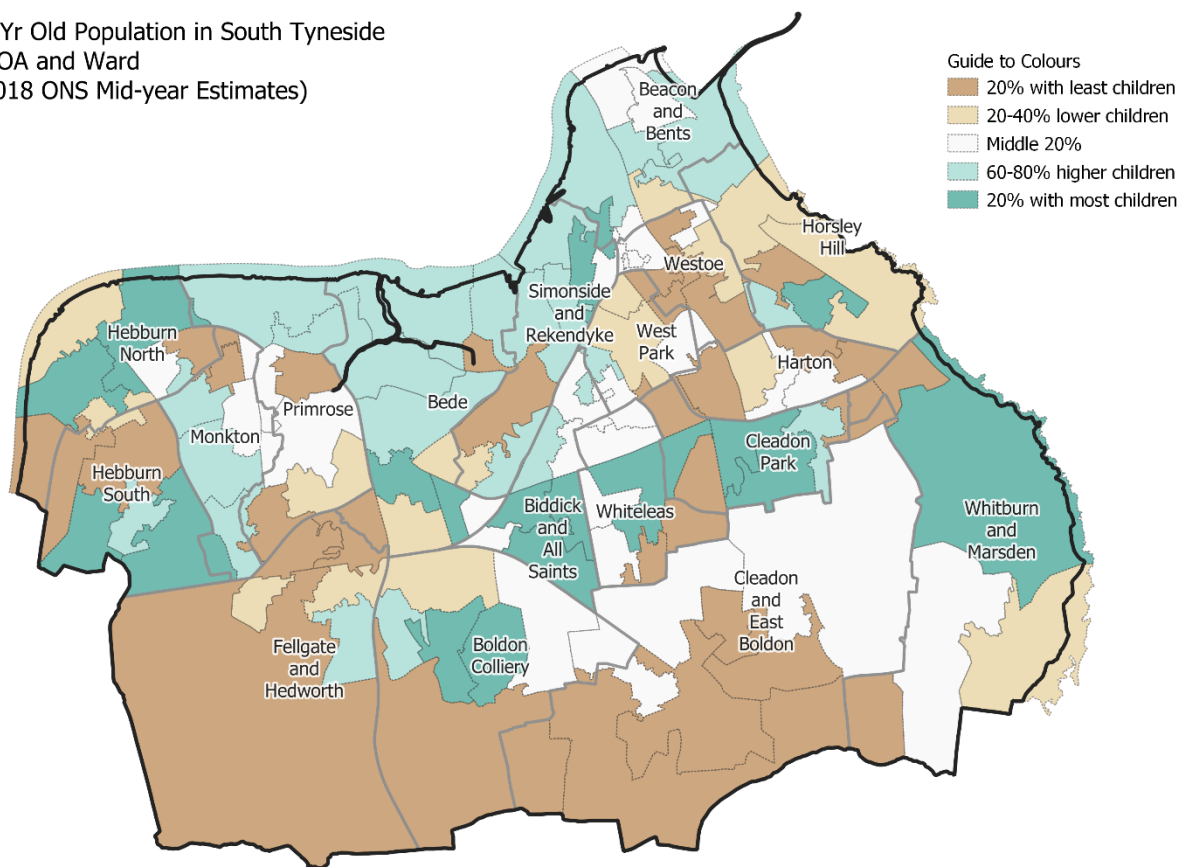
Map 1: South Tyneside Wards and Lower Super Output Areas shaded by the relative number of three and four year-olds

2 Yr Old Population in South Tyneside  
LSOA and Ward  
(2018 ONS Mid-year Estimates)



Map 2: South Tyneside Wards and Lower Super Output Areas shaded by the relative number of two year-olds

## 1 Yr Old Population in South Tyneside LSOA and Ward (2018 ONS Mid-year Estimates)



Map 3: South Tyneside Wards and Lower Super Output Areas shaded by the relative number of one-year olds

### Likely changes in demand due to population growth

There is no evidence that there is any forecast change in the local 0-15 population. In-flow into the area and out-flow from the area was reported as relatively static<sup>11</sup>.

### Likely changes in demand due to regeneration schemes, urban renewal and other developments

There is likewise no evidence of any forecast change in demand due to regeneration schemes, urban renewal and other developments. Any likely changes in demand due to housing developments and urban regeneration initiatives such as the International Advanced Manufacturing Park (IAMP), currently under construction, will be identified at an early stage through school-based planning and the Early Years team will be involved in ensuring sufficient childcare is available<sup>12</sup>.

<sup>11</sup> Findings of Action Planning workshop with the Early Years team 28 November 2019

<sup>12</sup> As above

## Likely changes in demand due to change in economic activity

No significant changes in economic activity are expected, although the Early Years team continue to monitor known risks<sup>13</sup>.

## Number of children with special educational needs and disabilities

### Children under 19 with Education, Health and Care (EHC) plans

The number of children in South Tyneside aged 19 or under with an Education, Health and Care (EHC) plan projections for July 2019 is 1,215. Only 31 of these are under the age of five. Children's needs change over time and are identified at different ages. Among the youngest children, SEND may only be identified when they start in childcare or school, and it can take some time from problems being identified to an EHC plan being issued.

Age	July 2019 Number of children
<b>Under age 5</b>	31
<b>Aged 5 to 10</b>	484
<b>Age 11 to 19</b>	700
<b>Total</b>	1,215

Table 3: Number of children with Education, Health and care plans projected at July 2019<sup>14</sup>

We can see in the table below that the whilst the number of preschool children with ECP plans is projected to fall by July 2021, the number of primary school children is projected to rise by 52 children, or 10%.

Age	July 2021 Number of children
Under age 5	19
Aged 5 to 10	536
Age 11 to 19	829
Total	1,384

Table 4 :Projected number of children with Education, Health and Care Plan July 2021

This may indicate a slight rise in demand for inclusive out of school childcare in this age group over the next year.

Looking forward to July 2022, it can be seen from the chart below that the number of Key Stage 3 and 4 year olds (approximately ages 11 – 16) is forecast to rise by 200 from July 2019, whilst other age groups will see much more modest changes. This forecast rise in the number of secondary age children may have an impact on demand for suitable out of school places.

<sup>13</sup> As above

<sup>14</sup> Provided by South Tyneside SEND Services

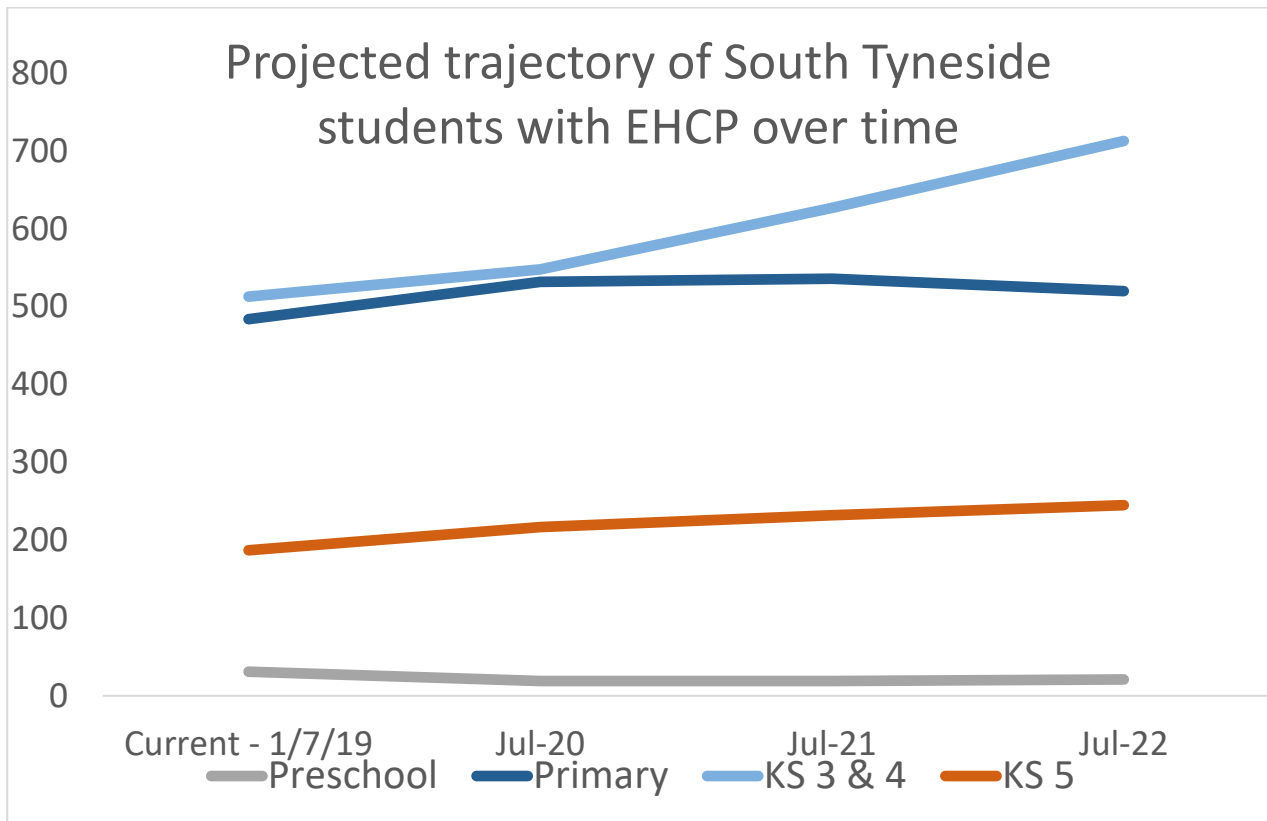


Figure 1: Age range trajectory of students with Education, Health and Care Plans.

Nationally and for all ages, 14.9% of all pupils have special educational needs in January 2019, with 3.1% of all pupils<sup>15</sup> having an Education, Health and Care plan.

### Preschool children referred to South Tyneside Portage and Preschool service.

Looking at local SEND referrals to South Tyneside Portage and Preschool service, total preschool referrals increased by 17% in the academic year 2018-19 and remained at this level for the following year.

This may be an indication that the previous upward trajectory has stabilised, although further years' data will improve confidence in this trend. There is therefore no evidence of a likely immediate increase in overall demand for three and under childcare places.

Referral year	Number
2017-18	211
2018-19	247
2019-20	246
<b>Total</b>	<b>704</b>

Table 5: SEND referrals to Preschool and Portage by academic year. The figures for 2019-20 represent a projected total.<sup>16</sup>

<sup>15</sup> DfE: Special educational needs in England: January 2019, July 2019.

<sup>16</sup> This projection is based on actual 2019-2020 figures (11 months) plus a forecast 10 additional cases for month 12.



For each of the three academic years 2017-2018 to 2019-2020, most of the referrals were for three-year old children. In 2018-2019, the number of referrals for each of the age groupings increased, whilst in 2019-2020 the uplift was limited to three year-olds.

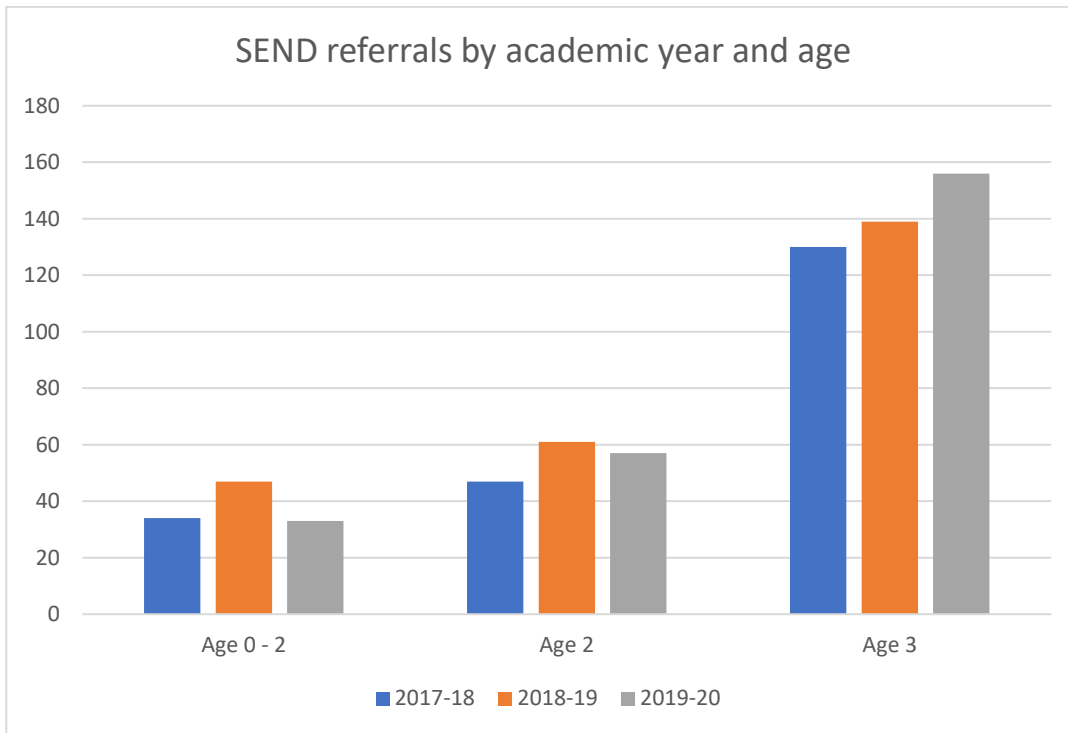


Figure 2: SEND Referrals to Portage and Preschool Service by academic year. The figures for 2019-20 represent a projected total.<sup>17</sup>

The proportion of pre-school population by age of SEND referrals has remained broadly constant over the last three years, with a slight spike in the proportion of under three referrals in 2018-19, whilst the proportion of three year olds has been consistently increasing over the three years.

<sup>17</sup> This projection is based on actual 2019-2020 figures (11 months) plus a forecast 10 additional cases for month 12, allocated according to previous 11 month data.

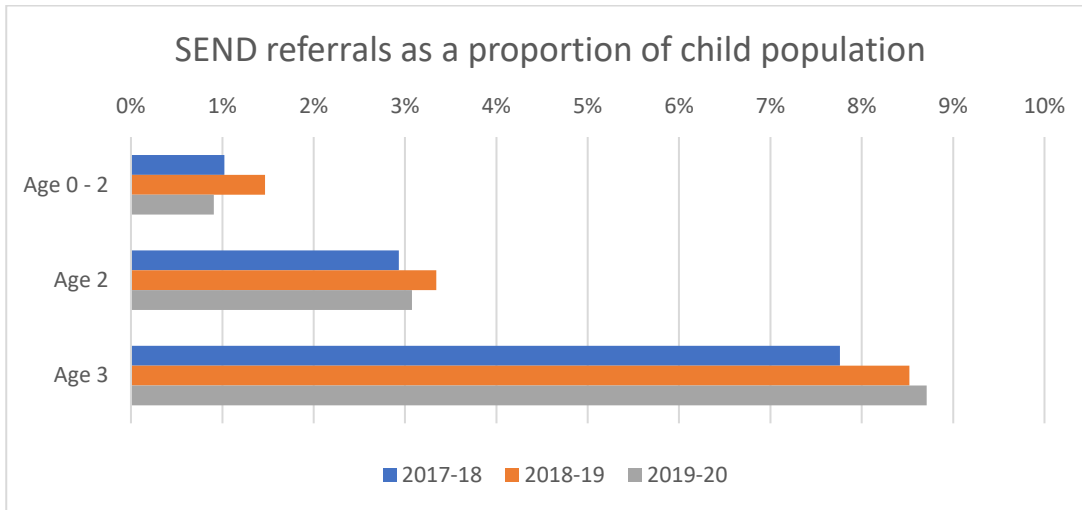


Figure 3: SEND referrals as a proportion of child population by age<sup>18</sup> The figures for 2019-20 represent a projected total.<sup>19</sup>

An analysis of the reason for referral of pre-school children in South Tyneside shows that the number of referrals for developmental delay is increasing year on year. However, there is no consistent trajectory for those referred for Speech and Communication, which has represented the highest number of referrals each year.

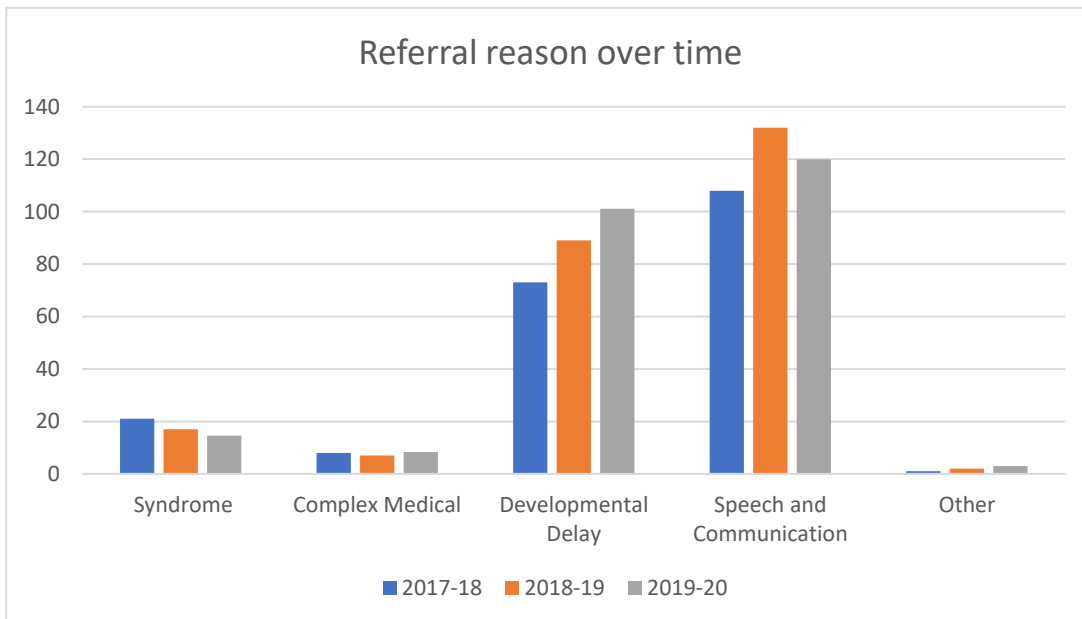


Figure 4: Chart showing change in referral reasons over three years. The figures for 2019-20 represent a projected total.<sup>20</sup>

<sup>18</sup> Preschool and portage data is provided by academic year whilst population estimates are mid-year.

<sup>19</sup> This projection is based on actual 2019-2020 figures (11 months) plus a forecast 10 additional cases for month 12, allocated according to previous 11 month data.

<sup>20</sup> This projection is based on actual 2019-2020 figures (11 months) plus a forecast 10 additional cases for month 12, allocated according to previous 11 month data.

## 6. Supply of childcare

Evidence for supply of childcare was drawn from four sources:

- i. Data provided by South Tyneside Early Help team<sup>21</sup>
- ii. Feedback from South Tyneside officers at an Action Planning workshop held on 28<sup>th</sup> November 2019
- iii. Data from the South Tyneside Education team (Education, Health and Care plans)<sup>22</sup>
- iv. Data from South Tyneside Preschool and Portage team (SEND data)

### What the quantitative data told us.

#### Number of early years providers

In total, there are 182 childcare providers in South Tyneside.

There is a strong maintained sector, with 12 local authority-run children's centres offering childcare. The Council's directly managed STANLEY's (South Tyneside Accredited Network for Learning in the Early Years) are 12 childcare settings that are co-located with other children's services in different locations throughout the Borough. Eight of these offer mainly or wholly sessional care, with four offering full daycare. This integrated approach provides wraparound support through access to children's centres and early outreach support, as well as engaging parents in parenting classes and providing access to employment opportunities.

Type of provision	Number of providers <sup>23</sup>
Childcare on non-domestic premises	0
Childminder	103
Children Centre	12
Home Childcarer	5
Parent & Toddler Group	2
Play Clubs	1
Playgroups And Out Of School Clubs	2
Out of school and holiday club	1
Pre School Playgroup	3
Private Nurseries	18
School	35
<b>Total</b>	<b>182</b>

There is a reasonable distribution of childcare settings in South Tyneside other than in the predominantly industrial area encompassing Simonside and Rekensdyke and north east Bede, with comparatively few

<sup>21</sup> October 2019

<sup>22</sup> October 2019

<sup>23</sup> Data provided by South Tyneside data team, October 2019

settings in relation to a high population of children and high levels of deprivation. However, local intelligence from the Early Years' team indicates that families are likely to access provision within walking distance in more residential neighbouring wards.

## Number of early years places

In order to quantify the total registered places data we took the number of children who were accessing *funded* provision by setting. This will include eligible two year olds and all three and four year olds. Please see Introduction to funded early education for eligibility criteria.

These settings provide funded sessions for 6,667 children<sup>24</sup>. Please note that some of these children may be accessing childcare in more than one setting. For example, one child may attend one setting in the morning and another one in the afternoon.

Type of provision	Number of providers <sup>25</sup>	Number of Children claimed for
Childcare on non-domestic premises	0	0
Childminder	103	237
Children Centre	12	1466
Home Childcarer	5	0
Parent & Toddler Group	2	0
Play Clubs	1	51
Playgroups And Out Of School Clubs	2	50
Out of school and holiday club	1	0
Pre School Playgroup	3	56
Private Nurseries	18	1887
School	35	2920
<b>Total</b>	<b>182</b>	<b>6667<sup>26</sup></b>

Table 6: Supply of childcare including number of children using provision and accessing funding<sup>27</sup>

\* Some childminder places may also be available for older children.

## Number of school-age providers and places

Quantifying the total supply of wrap-around and holiday care for school-age children is not possible as only some of this type of provision is registered with Ofsted and so any attempt to quantify the number of places and providers will significantly under-report provision. However, we do know that families in South Tyneside are able to access childcare provided by the following:

- Two Ofsted-registered breakfast and after-school clubs
- Three Ofsted-registered after-school clubs

<sup>24</sup> This figure includes the children who live outside the South Tyneside area but access its childcare provision.

<sup>25</sup> Data provided by South Tyneside data team.

<sup>26</sup> The number of children is derived from an amalgamation of financial data provided by South Tyneside Council.

<sup>27</sup> This data was provided by the client in October 2019.

- A number of schools that receive funding to provide breakfast for children before school but do not charge families and register as a club.
- Childcare for school age children during term time and the holidays is provided by some childminders.
- Parents may also use provision which is not considered 'childcare', for example sports or arts clubs after school or in the holidays.

We understand that the demand (and possibly unmet demand) of this type of childcare is a topic to be explored in the summer 2020 Parents' survey.

### Childcare that is available during atypical hours

Whilst there is no current data of formal childcare available during atypical hours (outside 8am to 6pm on weekdays), Ofsted-registered childminders may be providing this in response to parental need.

### Likely changes in childcare provision over the next three years

This information was derived from the Providers' Survey<sup>28</sup>

Six respondents noted that they were likely to **increase** provision, reporting that this would provide care in the following age ranges:

- 0 to 5 (two respondents)
- Under threes
- 3 to 4 year olds

This was matched by six respondents who noted that they were likely to **reduce** the number of places in the next 3 years, with reasons being retirement and children leaving as they grew older. One childminder noted that they wished would like to stop providing afterschool care for older children.

No data was available with regard to changes in childcare provision for older children.

### Accessibility of childcare - supply of childcare for children with special educational needs or disabilities

All childcare settings in South Tyneside aim to be inclusive by offering care for children with Special Educational Needs or Disabilities (SEND).

Some providers noted in their responses to the Providers' Survey<sup>29</sup> that they felt there was insufficient appropriate childcare for children with special educational needs in South Tyneside. However, the early years team at South Tyneside reported<sup>30</sup> that this was unlikely to be that case and that in their experience, there was no shortage of capacity for parents and carers to access early years provision, with many parents choosing private and maintained nurseries with a range of facilities. Nursery staff have cycles of SEND support and children have a plan in place as they move into a schools' setting. Whilst childminders are

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<sup>28</sup> Please see Appendix II for methodology and full report.

<sup>29</sup> Please see Appendix I for full report

<sup>30</sup> In the Action Planning workshop 28 November 2019

keen to offer inclusive care, it is not always financially viable for them to do so, if this means that they are unable to provide care for other children at the same time<sup>31</sup>.

No data was provided in relation to the provision of childcare for school age children with special educational needs or disabilities. However, it is understood some schools provide an 'extended offer' with provision extending beyond the school day.

## 4 Funded early education

### Introduction to funded early education

Some children are entitled to free childcare, funded by the government. These entitlements are for 570 free hours per year, usually taken as 15 hours over 38 weeks of the year.

All children aged 3 and 4 are entitled to 15 hours per week until they start reception class in school (the universal entitlement).

Children aged 3 and 4 where both parents are working, or from lone parent families where that parent is working, are [entitled](#) to 30 hours per week until they start reception class in school<sup>32</sup> (the extended entitlement).

Children aged 2 whose families receive certain benefits (including low income families in receipt of in-work benefits), or those who meet additional non-economic [criteria](#), are entitled to 15 hours per week.

Nationally, about 40% of 2 year olds are entitled to this offer, but the proportion varies by area. In south Tyneside, 50% of two year olds are entitled to the offer.

Parents do not have to use all the hours of their funded entitlement. They may choose to split them between providers. With the agreement of their provider, parents may also spread them across the year – for example, rather than taking 15 hours for 38 weeks a year they could take just under 12 hours for 48 weeks a year, as long as their chosen childcare provider is open during this period.

### Proportion of 2-year-old children entitled to funded early education

In order to find a proxy for the number of two year old children entitled to funded education, we looked at the number of two year olds who fell into the 20% most deprived LSOA. In South Tyneside, it works out at 50% of children, or 926 children. These are projections based on the 2018 ONS Mid-year estimates.

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<sup>31</sup> Findings from the Action Planning workshop, 28 November 2019

<sup>32</sup> Available to families where each parent (or one parent in a single adult household) are earning the equivalent of working sixteen hours per week on the minimum wage

## Providers offering funded places

There are 56 settings claiming for families accessing free childcare for two year olds) and 121 claiming for the Universal and Extended offers (for three and four year olds).

Provider Type	Number	Number of settings with Families accessing 2 year old funding	Number of settings with Families accessing 3 & 4 year old care	% of settings providing 2 year old care	% of settings providing 3 & 4 year old care
Childcare on non-domestic premises	0	0	0	0	0
Childminder	103	16	54	16%	52%
Children Centre	12	12	9	100%	75%
Home Childcarer	5	0	0	0%	0%
Parent & Toddler Group	2	0	0	0%	0%
Play Clubs	1	0	1	0%	100%
Out of school and holiday club	1	0	0	0%	0%
Pre School Playgroups, Playgroups and Out Of School Clubs	5	4	2	80%	40%
Private Nurseries	18	16	18	89%	100%
School	35	8	34	23%	97%
	<b>182</b>	<b>56</b>	<b>118</b>	<b>31%</b>	<b>65%</b>

Table 7: Number of providers by type offering funded places

## Take-up of funded early education

The proportion of eligible children taking up their funded early education entitlement (for at least some of the available hours) in South Tyneside compares favourably with England as a whole and the North East region, as is shown in the table below.

Age	2019 England	2019 North East	2019 South Tyneside
Age 2	68%	82%	85%
Age 3 and 4	94%	99%	98%

Table 8: Proportion of eligible children living within South Tyneside borders, taking up their free early education entitlement

## 7. Quality of childcare in South Tyneside

### Ofsted inspection grades

All childcare providers must register with and be inspected by Ofsted, who give them an overall grade for the quality of their provision. Childminders and private and voluntary providers are on the Early Years Register, and schools and standalone maintained nursery schools are on the Schools register. The grades for both registers are equivalent.

Both schools and early years providers have four possible Ofsted grades: 'outstanding', 'good', 'requires improvement', and 'inadequate'.<sup>33</sup> Some providers are still awaiting their first full inspection. These providers are excluded from our calculation.

Nursery classes in independent schools do not generally have an Ofsted grade.

Type of provision	Total number of providers	% achieving good or outstanding
Childcare on non-domestic premises <sup>34</sup>	3	100%
Childminders	70	99%
Maintained nursery schools & nursery classes in schools <sup>35</sup> *	45	91%
Childcare provided in Children's Centres	12	100%
Playgroups And Out Of School Clubs	4	100%
Private and voluntary nurseries	17	100%
<b>Total</b>	<b>151</b>	<b>97%</b>

Table 9: Quality of childcare providers by type of provision

\* early years grade if available, otherwise overall school grade

97% all the childcare in South Tyneside is Good or Outstanding.

This means children in South Tyneside can access good or outstanding childcare regardless of the deprivation characteristics of where their chosen childcare is situated.

## 8. Affordability of childcare in South Tyneside

No data was available to map the cost of childcare in South Tyneside. However, providers were asked in the Providers' survey<sup>36</sup> as to describe parental views on affordability.

<sup>33</sup> For more information see <https://reports.ofsted.gov.uk/about-our-inspection-reports>

<sup>34</sup> This is childcare that is not provided on domestic premises (typically childminder) that does not fall into one of the categories below.

<sup>35</sup> This has not been possible to disaggregate from data supplied.

<sup>36</sup> Please see Appendix I for full report.



Most of the providers (over two thirds) of respondents felt that childcare was affordable.

## Affordability – for parents

### *Do you agree Parents find fees affordable?*

<b>Yes</b>	<b>69%</b>
<b>No</b>	<b>7%</b>
<b>Not applicable</b>	<b>25%</b>

Four respondents answered 'No' to this question, with two citing Universal Credit as an issue:

*'Universal Credit has caused financial difficulties for parents looking to start work'* [Childminder]

*'Some parent really struggle with childcare costs and Universal Credit doesn't help the situation'*  
[Childminder]

However, other comments focused more on affordability in relation to other factors:

*'Depends on their job and income!'* [Childminder]

*'We charge similar to other nursery schools and adjoining childcare'* [Setting type withheld to preserve anonymity]

*'Our Breakfast and After School club is used by parents in both areas and are cheaper than childminder fees.'* [Setting type withheld to preserve anonymity]

## Coronavirus/ COVID-19 update

South Tyneside's Childcare Sufficiency Assessment was finalised during the emerging COVID-19 pandemic. It is highly likely that the enforced closure of all childcare provision other than for critical workers and vulnerable children as from 24 March 2020 until further notice will have far-reaching consequences on the childcare sector in South Tyneside.

## C. Gap Analysis

The following section describes the evidence of potential gaps in the availability of accessible, affordable and quality childcare in South Tyneside.

### Evidence of unmet demand for early years childcare shown in early years waiting lists

Information about waiting lists was collected from providers via the CSA Provider survey (see Section II for a full report including sample size and methodology), which took place in the autumn term 2019.

Waiting lists are a snapshot and often change rapidly. Often one child will be on several waiting lists. The setting may be awaiting a vacancy for the child’s specific age, or the parent may be waiting until the child’s next birthday, so becoming eligible for either the two or three year-old funded childcare places.

Around a third of provider respondents to the survey noted that they had waiting lists. Half of the freeform comments that accompanied this answer noted that the children on the waiting list would be able to access the place once they had turned two years old and so able to access the funded offer, thus indicating a demand for free childcare rather than childcare itself.

These responses therefore do not indicate a shortage of childcare.

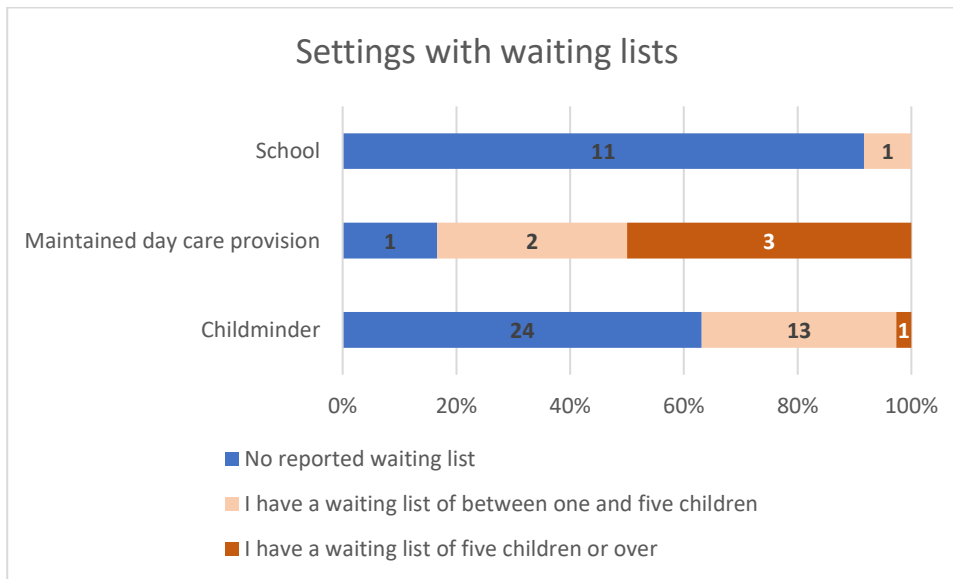


Figure 5: Setting with waiting lists

### Evidence of over-supply of early years childcare shown in early years vacancies

Information about vacancies was collected from providers via the CSA Provider survey (see Appendix I for a full report including sample size and methodology), which took place in the autumn term 2019.

Vacancy rates are a snapshot, and often change rapidly. In some cases, providers may have a vacancy which is only available for a specific age group, or for a particular part-time arrangement. Often, vacancy rates are higher in the autumn when children move to school.

Around a third of providers reported that they had vacancies they would like to fill. This figure includes seven of the 12 respondent schools (58%) and 11 of the 38 childminders (29%).

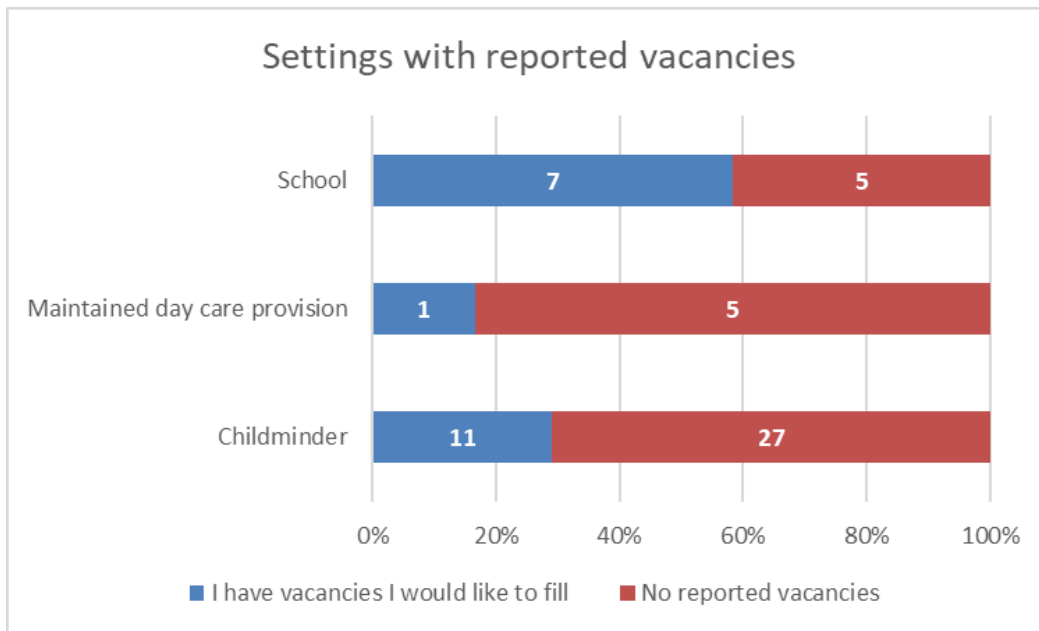


Figure 6: Setting with reported vacancies

The number of settings with reported vacancies are insufficient to point to a general over-supply of childcare.

### Evidence of unmet demand for childcare for SEND children, evidenced by waiting lists

There is no reported quantitative evidence of unmet demand, in that there is no waiting list of SEND children who are currently awaiting childcare placements<sup>37</sup>.

### Evidence of unmet demand for funded early education places evidenced through take-up proportions

The most recent (2019) figures from the DfE show the proportion of eligible families taking up funded early education places for two year olds is 85%, which compares very favourably with the national average of 68%. Likewise, the proportion of families taking up their entitlement for the three and four year old offer is 98%, also above the national average of 94%. This indicates that the significant demand from local families for such places is being met.

<sup>37</sup> Findings from Action Planning workshop, 28 November 2019

## Providers views on Sustainability of the Childcare market in South Tyneside

In the Providers' Survey, respondents were asked a series of questions exploring different factors influencing the sustainability of the childcare market in South Tyneside.

Their responses indicate a broadly positive view, with one clear exception: more than half believed there was insufficient appropriate childcare for children with special educational needs.

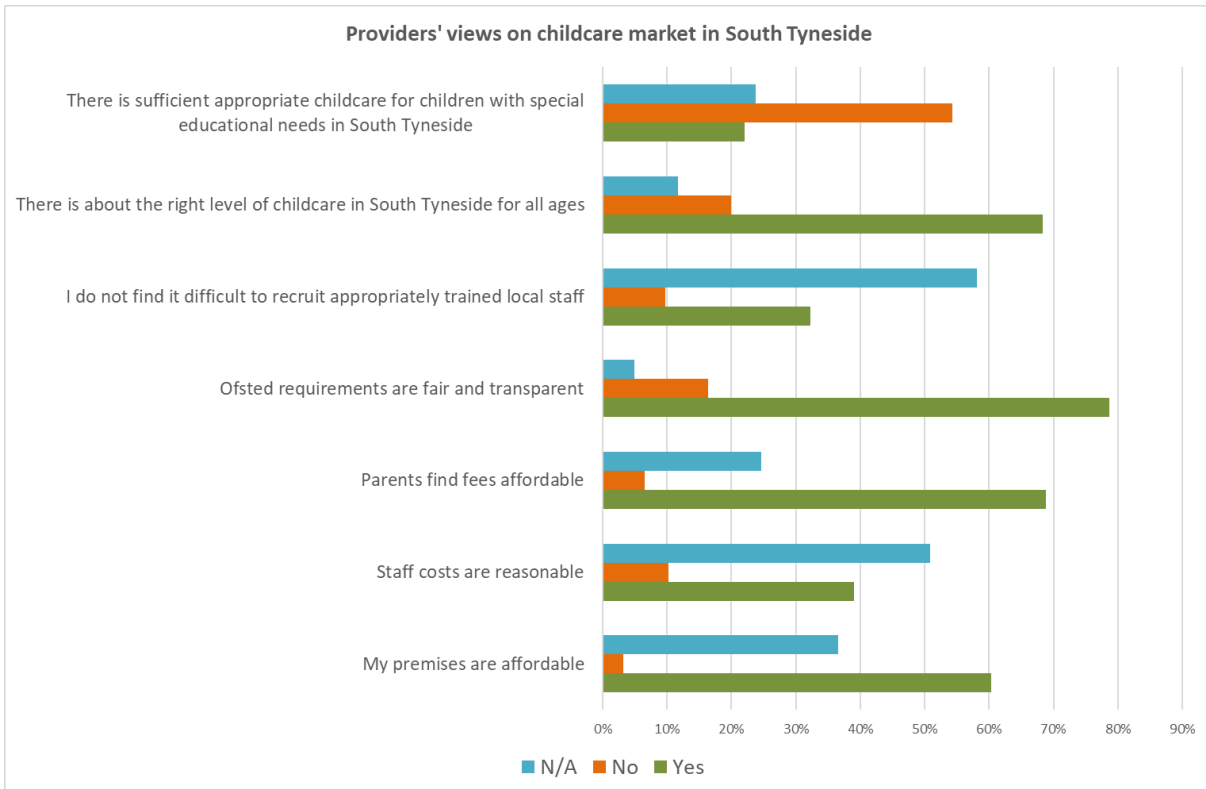


Figure 7: Providers' views on childcare market

A detailed breakdown with of providers responses to these questions can be seen below, together with examples of free text responses.

### Sufficiency of childcare generally in South Tyneside

***Do you agree there is about the right level of childcare in South Tyneside for all ages?***

<b>Yes</b>	<b>68%</b>
<b>No</b>	<b>20%</b>
<b>Not applicable</b>	<b>12%</b>

Whilst only 20% of the providers responding to this question thought there was insufficient childcare in the borough, the freeform comments focused on specific areas:

- **Affordability** – ‘I feel that there could be more affordable childcare in South Tyneside’ [Childminder]
- **Under two’s** ‘Insufficient places for under 2’s’ [Maintained day care provision]
- **Two and three year olds** – ‘I have had to turn down a lot of the 2 and 3 year offer because I can only have 3 under 5s, so I don’t think there is enough childcare spaces to cover all these children’ [Childminder]
- **Schools provision** - Not enough places in local schools to cover the demand needed. [Childminder]

Not all comments related to the number of places, with the following points made:

‘There are more choices for parents due to the 30 hours funding, private nurseries, school nurseries and childminders’. [Childminder]

‘The SEED report states that the best place for our youngest members of society is within the home-based setting, yet Nursery Schools are encouraging parents to place with them.’. [Childminder]

## Sufficiency of childcare for children with special educational needs and disabilities

**Do you agree there is sufficient appropriate childcare for children with special educational needs in South Tyneside?**

<b>Yes</b>	<b>22%</b>
<b>No</b>	<b>54%</b>
<b>Not applicable</b>	<b>24%</b>

Specific concerns around sufficiency of provision included:

- Not enough spaces generally, leading to a lack of parental choice
- Requirement for more early years provision
- Requirement for more early years care in specialist provision
- Lack of suitable provision for children in early years with ASD

However, one respondent noted that: ‘If the child has an EHCP and access to funding for one-to-one then any setting within reason could provide outstanding care for any particular child’. [Childminder]

Looking in more detail at the respondents to this question, it is clear that the providers in the maintained sector have a much stronger sense that there isn’t enough childcare for SEND children than those in the non-maintained sector.

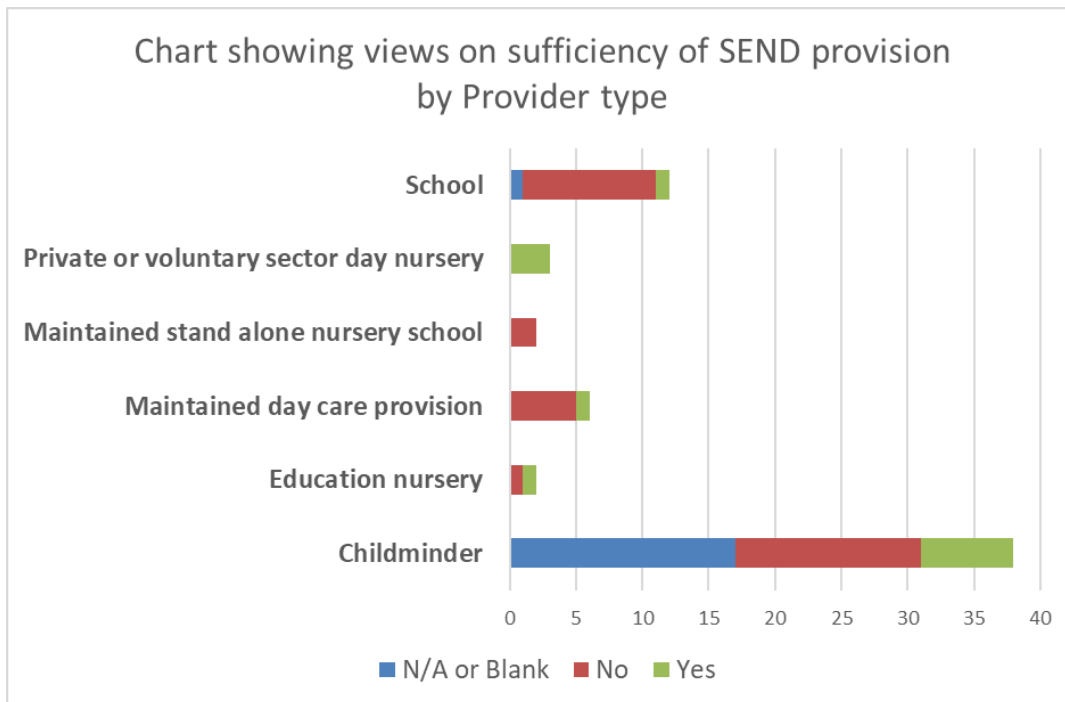


Figure 8: View of providers on sufficiency of childcare for children with special educational needs or disabilities

## D. Sources

From South Tyneside:

- Providers' list (October 2019)
- Early years funded education financial data which included 2-year old financial data, EY Census and EY child list
- Schools census
- Locality delivery areas by postcode
- Education Care and Health Plan forecasts (October 2019)
- SEND preschool referral forecasts (as of February 29 2020)

From publicly available datasets, extracted November-December 2019.

- [Mid-year population estimates 2018 and prior](#)
- [Long-term population and methodology](#)
- [OFSTED Schools Information](#)
- [OFSTED Early Years Information](#)
- [2019 Indices of Deprivation](#)
- [ONS Geoportal \(for LA and ward boundaries\)](#)

## E. Appendix I – Provider Survey Analysis

### 1. Introduction

In order to investigate any issues that may cause changes in the local childcare market, we consulted with local providers to understand their assessment of the local childcare market, their plans and their concerns.

### 2. Methodology

In order to reach as many local providers as possible, from a range of settings, it was decided to use a self-completion methodology, via an e-Survey.

The questions were developed in conjunction with the Council. In order to maximise response, the number of questions was limited to 10 and the survey was completed anonymously.

The e-survey was disseminated by the client to all providers by email on Monday 21<sup>st</sup> October 2019 with a close date of Friday 1<sup>st</sup> November 2019.

### 3. Findings

#### The respondents to the Survey

##### Setting type

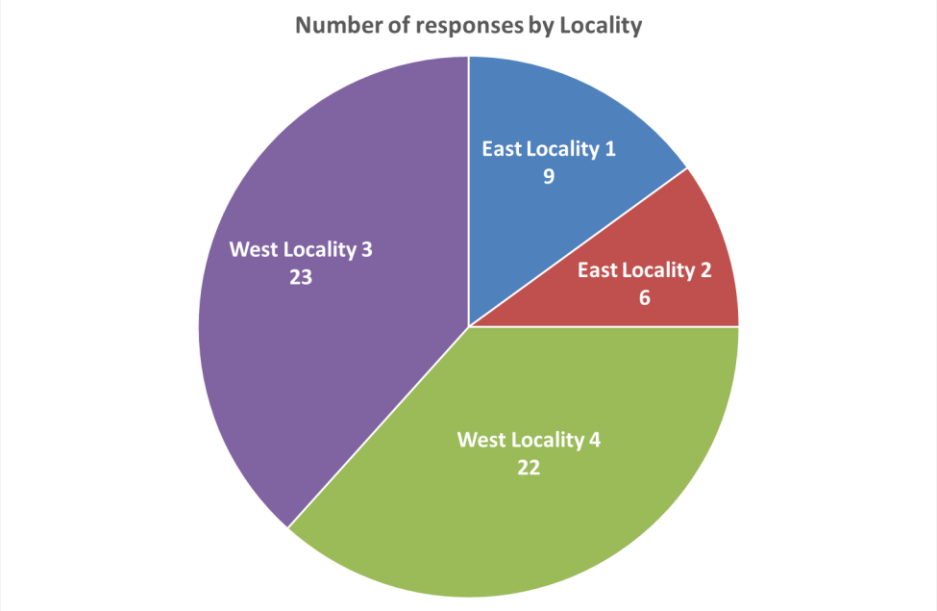
63 settings responded to the survey. There are 182<sup>38</sup> settings in South Shields, meaning that responses were received from over a third of the settings, with a particularly high response from childminders, representing 37 % of all childminders in South Tyneside.

Setting type	Responses		
	No.	% of total responses	% of setting type in South Tyneside
Childminder	38	60%	37%
Private or voluntary sector day nursery	3	5%	17%
Maintained day care provision	6	10%	50%
Maintained stand-alone nursery school	2	3%	Insufficient comparator data
Education nursery	2	3%	Insufficient comparator data
School	12	19%	Insufficient comparator data
<b>Answered</b>	<b>63</b>		
<b>Skipped</b>	<b>0</b>		

<sup>38</sup> Derived from information provided by South Tyneside early years team October 2019 in preparation for the South Tyneside CSA 2019. Proportions derived from the Draft South Tyneside CSA 2019 where direct comparator data is available, data supplied by client October 2019.

### Responses by Locality

Most respondents came from West Locality 3 (38%) and West Locality 4 (37%).



### Quality - Ofsted rating of respondents

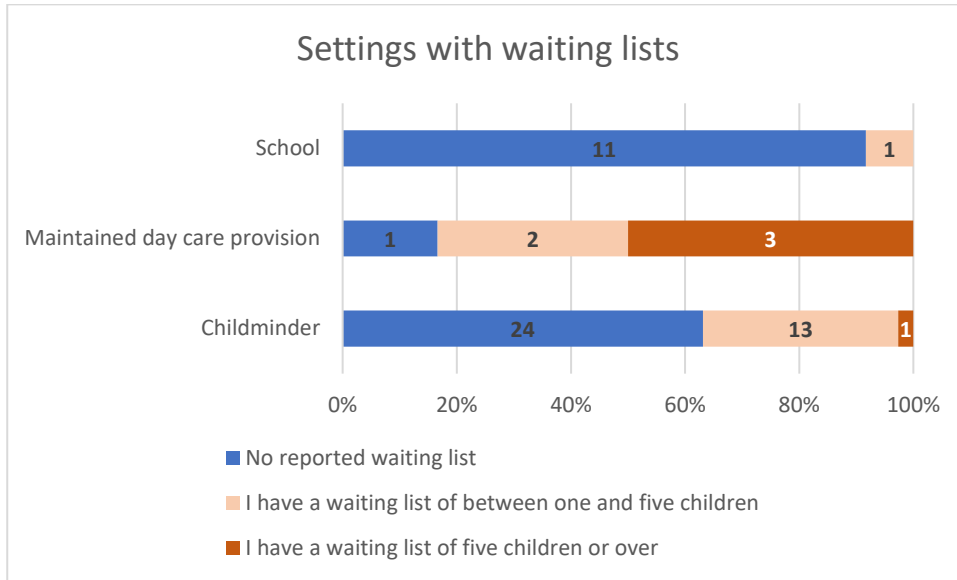
56 of the 63 respondents (89%) were either Outstanding or Good. Only two were 'Requires Improvement' and five elected not to answer the question. This is broadly reflective of the local picture.



## Capacity - Waiting Lists and Vacancies

### Waiting lists

23 or just over a third of respondents noted that they had a **waiting list**.

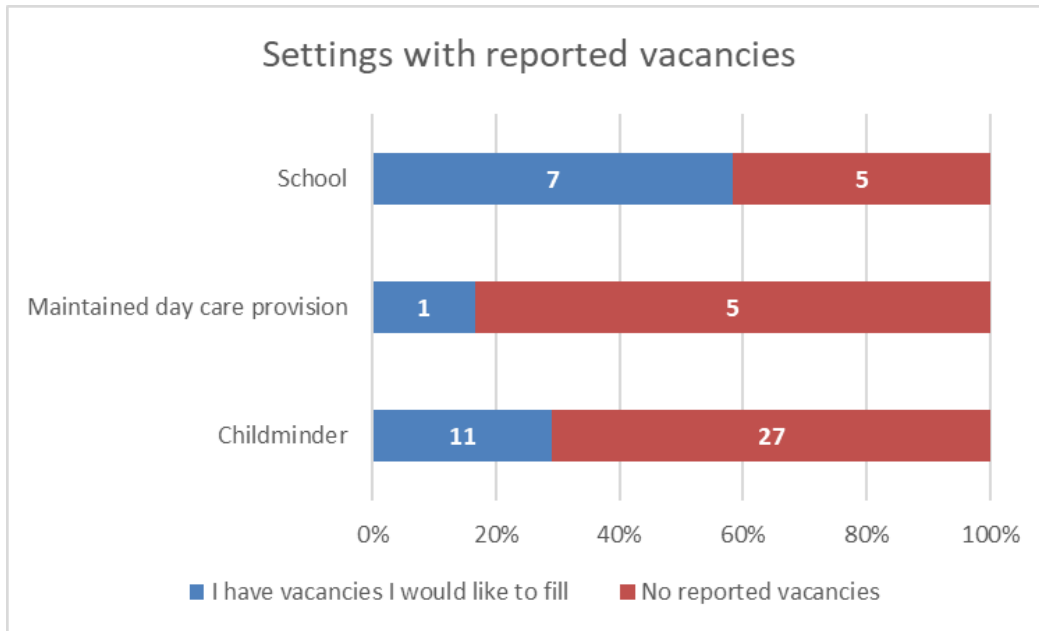


Please note this chart excludes setting types with three responses or less.

When asked about further details, for example the age of the children on their waiting lists, we received six responses. Three of these noted that they had children on the list who were waiting for their entitlement to the two-year old offer, for example: 'We have some children on our waiting list who will be able to have a place once they turn 2.' (PVI Provider')

### Vacancies

Likewise, just over a third of respondents noted they had vacancies they would like to fill. This figure includes seven of the 12 respondent schools and 11 of the 38 childminders.



Please note this chart excludes setting types with three responses or less.

Respondents did not take the opportunity to provide further comments relating to this question.

### Likely changes in provision over the next three years

Six respondents noted that they were likely to **increase** provision, reporting that this would provide care in the following age ranges:

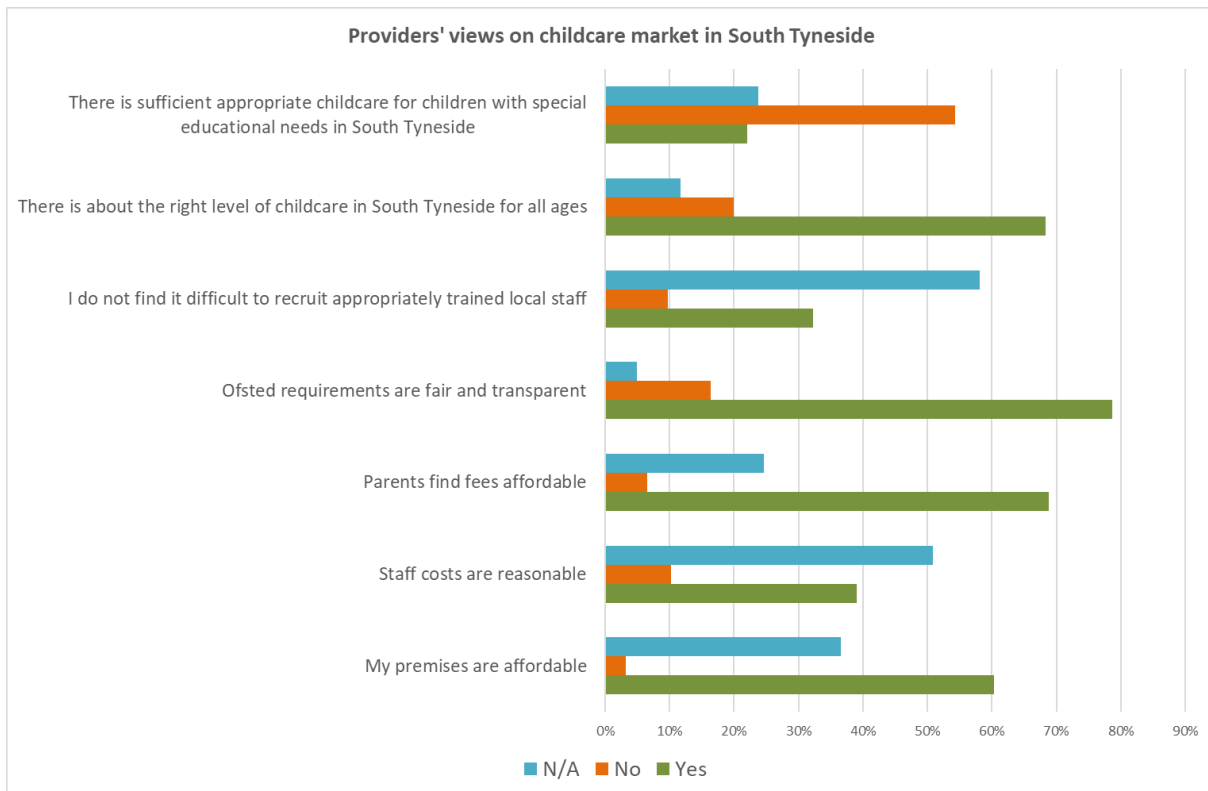
- 0 to 5 (two respondents)
- Under threes
- 3 to 4 year olds

This was matched by six respondents who noted that they were likely to **reduce** the number of places in the next 3 years, with reasons being retirement and children leaving as they grew older. One childminder noted that they wished would like to stop providing afterschool care for older children.

## Providers views on Sustainability of the Childcare market in South Tyneside

Respondents were asked a series of questions exploring different factors influencing the sustainability of the childcare market in South Tyneside.

Their responses indicate a broadly positive view, with one clear exception: more than half believed there was insufficient appropriate childcare for children with special educational needs.



A detailed breakdown with of providers responses to these questions can be seen below, together with examples of free text responses.

### Sufficiency of childcare generally in South Tyneside

***Do you agree there is about the right level of childcare in South Tyneside for all ages?***

Yes	68%
No	20%
Not applicable	12%

Whilst only 20% of the providers responding to this question thought there was insufficient childcare in the borough, the freeform comments focused on specific areas:

- **Affordability** – *'I feel that there could be more affordable childcare in South Tyneside'* [Childminder]
- **Under two's** *'Insufficient places for under 2's'* [Maintained day care provision]

- **Two and three year olds** – *'I have had to turn down a lot of the 2 and 3 year offer because I can only have 3 under 5s, so I don't think there is enough childcare spaces to cover all these children'*  
[Childminder]
- **Schools provision** - Not enough places in local schools to cover the demand needed.  
[Childminder]

Not all comments related to the number of places, with the following points made:

*'There are more choices for parents due to the 30 hours funding, private nurseries, school nurseries and childminders'.* [Childminder]

*'The SEED report states that the best place for our youngest members of society is within the home-based setting, yet Nursery Schools are encouraging parents to place with them.'* [Childminder]

## Sufficiency of childcare for children with special educational needs and disabilities

***Do you agree there is sufficient appropriate childcare for children with special educational needs in South Tyneside?***

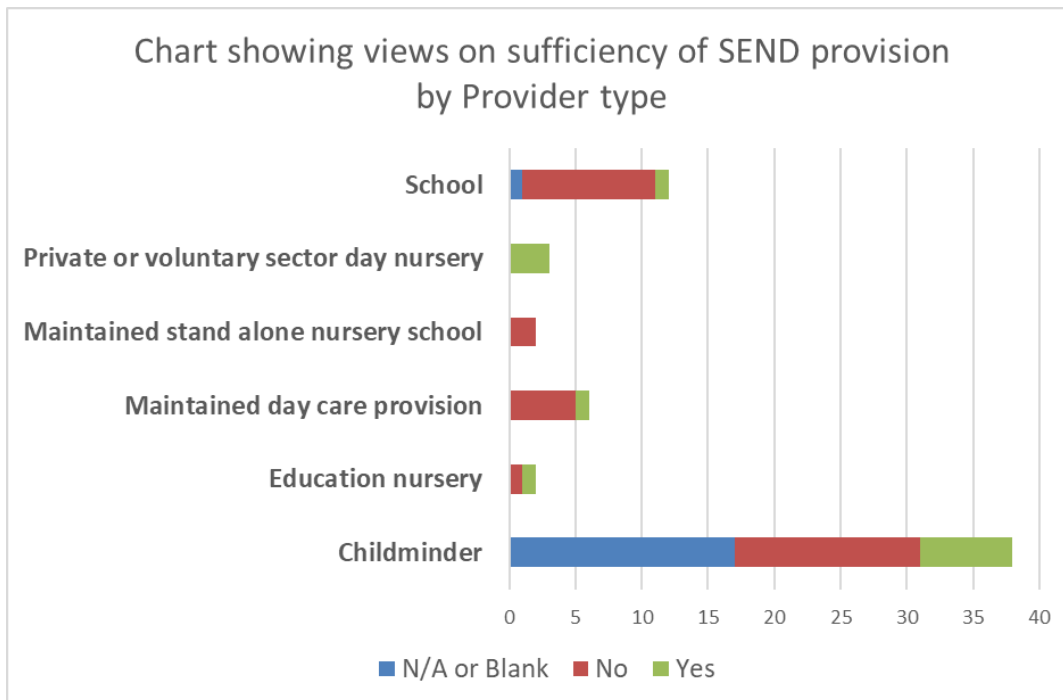
Yes	22%
No	54%
Not applicable	24%

Specific concerns around sufficiency of provision included:

- Not enough spaces generally, leading to a lack of parental choice
- Requirement for more early years provision
- Requirement for more early years care in specialist provision
- Lack of suitable provision for children in early years with ASD

However, one respondent noted that: *'If the child has an EHCP and access to funding for one-to-one then any setting within reason could provide outstanding care for any particular child'.* [Childminder]

Looking in more detail at the respondents to this question, it is clear that the providers in the maintained sector have a much stronger sense that there isn't enough childcare for SEND children than those in the non-maintained sector.



### Ease of recruiting appropriately trained staff

***Do you agree that you do not find it difficult to recruit appropriately trained local staff?***

Yes	32%
No	10%
Not applicable	58%

Most respondents to this question did not see it relevant to them. However, there were conflicting opinions for those that did:

*Some of the newly qualified staff have little knowledge of child development, they are activity driven.* [Setting type withheld to preserve anonymity]

*When an advert goes out to appoint within both schools we have a huge response. This means we can employ the best of the best.* [Setting type withheld to preserve anonymity]

### Fairness and transparency of Ofsted requirements

***Do you agree that Ofsted requirements are fair and transparent?***

Yes	79%
No	16%
Not applicable	5%

Six of the seven comments on Ofsted related to a perceived variability in Ofsted responses. Whilst the requirements were seen as fair, the implementation was not.

All the following comments were made by childminders:

*'Everyone at Ofsted has different answers to questions and don't all stick to the same rules'*

*'Ofsted requirements are fair but the nature of inspections means that all inspectors put their personal views into what they see, resulting in an unfair, biased inspections'*

*'Constantly changing and conflicting answers'*

*'Different options [opinions?] for each instructor or Ofsted call centre. No rules, just fluffy advice as to what they want. Ofsted could be used to help everyone caring/educating children instead of terrorising people that really care'*

*'Agree with Ofsted coming in, but I feel different Inspectors have different opinions which make it very difficult for Childminders'*

*'All inspectors don't work the same way'*

One (non-childminder) respondent noted that this was dependent upon the Ofsted Inspector's experience: 'if an inspector has experience teaching EYFS'

## Affordability – for parents

### **Do you agree Parents find fees affordable?**

Yes	69%
No	7%
Not applicable	25%

Over two thirds of respondents felt that childcare was affordable.

Four respondents answered 'No' to this question, with two citing Universal Credit as an issue:

*'Universal Credit has caused financial difficulties for parents looking to start work'* [Childminder]

*'Some parent really struggle with childcare costs and Universal Credit doesn't help the situation'* [Childminder]

However, other comments focused more on affordability in relation to other factors:

*'Depends on their job and income!'* [Childminder]

*'We charge similar to other nursery schools and adjoining childcare'* [Setting type withheld to preserve anonymity]

*'Our Breakfast and After School club is used by parents in both areas and are cheaper than childminder fees.'* [Setting type withheld to preserve anonymity]

## Affordability – staff costs

### *Do you agree that your staff costs are reasonable?*

Yes	39%
No	10%
Not applicable	51%

Just over half (30) of the respondents to this question (59) reported it was not relevant to them. This includes 24 of the 38 responding childminders, many of whom are likely to be working on their own.

One childminder reported staff costs as a reason not to recruit, whilst a PVI respondent reported staff costs were an issue:

*'I wouldn't be able to afford an assistant as my expenditure is too high'* [Childminder]

*'Due to being a small run business staffing costs always remain a difficulty'* [Private or voluntary sector day nursery]

## Affordability – premises

### *Do you agree that your premises are affordable?*

Yes	60%
No	3%
Not applicable	37%

Well over half of the respondents to this question felt premises were affordable.

*'Council rates are high'* [Setting type withheld to preserve anonymity]

*'I haven't increased my hourly fee for many years'* [Childminder]

*'I always ensure I have highly skilled staff which is why both nursery schools continue to be outstanding'*.  
[Setting type withheld to preserve anonymity]

## 4. Conclusion

The Providers' e-survey was a useful mechanism to gain the views of local providers on the state of the local childcare market.

With responses from 63 of South Tyneside's 182 settings, the views expressed are likely to be representative of South Tyneside's providers. However, looking at the characteristics of the responders in more granular detail, we see that there was an under-representation of Private or Voluntary sector day nurseries and providers from East Locality 1 and East Locality 2.

In respect of waiting lists and vacancies, the situation reported was one of a broad equilibrium, with a third of respondents reporting waiting lists and a third of respondents reporting vacancies. Looking at

responses relating to waiting lists in more detail, three of the respondents noted that they had children on the list who were waiting for their entitlement to the two-year old offer.

There was a similar picture of equilibrium regarding providers looking to change the number of places offered: six noted they would increase the number of places whilst six reported they were likely to reduce them.

When asked their views on the childcare market in South Tyneside, local providers reported a broadly positive assessment, with one significant exception: over half the respondents disagreed with the statement ***Do you agree there is sufficient appropriate childcare for children with special educational needs in South Tyneside?***

This then is a clear area for development in the future.



## F. Appendix II: Draft Action Plan

This action plan describes how the Early Years and childcare team in South Tyneside will address any gaps in local childcare, by supporting local families and providers. These were derived from an Action Planning workshop held 28 November 2019 with key staff from South Tyneside Council.

### **1. Access to live birth data to support children centre outreach**

South Tyneside team to engage with colleagues in Public Health to access new birth data which can be used to support outreach activities, particularly in relation to ensuring the requirements of children with disabilities are met in full.

### **2. Further exploration of out of school childcare demand - 8am to 6pm**

#### **Context**

The Early Years' team has not been made aware of unmet demand for group-based out of school childcare through FIS enquiries, and none was explicitly identified through the Providers' Survey.

Current supply is limited to Breakfast Clubs through Greggs funding, childminders (who are providing flexible provision) and one provider who offers school-age out-of-school provision, in one area - a community Interest Company (CIC), open 7.30 – 6.00pm.

It is unclear whether this limited supply is sufficient for limited demand, or whether parents would like more wrap-around childcare if it were to become available.

#### **Actions**

South Tyneside to put in place a consultation mechanism to find out from parents whether there was unmet demand for wrap around provision, including school holidays.

South Tyneside to consult with parents in a way that doesn't invite a negative response, using existing trusted channels (parents' current childcare providers and the destination schools).

The consultation questions could ask:

- What are your childcare plans once the children start school? (current childcare providers and destination schools)
- Do you have any worries about after-school provision?
- How much are you willing to pay for after-school provision?

### 3. Further exploration of SEND childcare demand, provision and specialist training

#### Actions

**3 (a) Set up focus groups** to consult in depth with **parents** and **settings** about provision for children with disabilities, including a discussion of out of school care requirements and provider training needs.

Other areas for investigation include:

- Is there a difference between the SEND training levels and confidence of PVI and maintained sector childcare workforce?
- Are the staff at PVI nurseries sufficiently valued for their work with SEND children – do they underestimate their own abilities?
- Do childcare staff have a level of concern about caring for children with disabilities that is not apparent and so not currently being addressed? Is the issue around complexity?
- Are there issues around moving and handling?
- Are insufficient staffing levels adding to anxiety?
- Should additional effort be made preparing families to move from the early years' settings experience to the schools' experience?

**3 (b) Devise and implement specialist internal/ PVI staff training** in response to this further consultation re SEND provision, including holistic topics such as how to manage the impact on professional carers when caring for a child who is not making expected progress.

### 4. Improved retention of childcare staff

#### Actions

- Improve maintained provision interview process to include a wider exploration of the role of the childcare worker, particularly in relation to the needs of disadvantaged families.
- Develop in-house training programmes to supplement the national childcare training curriculum that would address these issues
- Develop a strategy to value and affirm the strength of the childcare workforce.

If you want to know more about our research process and findings, please contact Isabelle Gregory at [isabelle.gregory@basis.co.uk](mailto:isabelle.gregory@basis.co.uk)