Harrow Early Years

Childcare Sufficiency Assessment Annual Update 2023

Harrow COUNCIL
LONDON

Contents

Introduction

The Local Authority is required by law to 'report annually to elected council members on how they are meeting their duty to secure sufficient childcare and make this report available and accessible to parents'.[1] We have prepared this report in order to meet this duty.

Having sufficient childcare means that families are able to find childcare that meets their child's care and learning needs and enables parents to make a real choice about work and training. This applies to all children from birth to age 14, including children with disabilities. Sufficiency is assessed for different groups, rather than for all children in the Local Authority.

This is the 2023 annual update further to the full Childcare Sufficiency Assessment (CSA) published in 2021 and subsequent annual update in 2022. In this report, we have used data on the need for childcare and the amount of childcare available, maintaining core measures utilised in the previous assessments for comparative purposes. This update will identify key findings and highlight any changes over the past year using baseline data. We use information about childcare sufficiency to plan our work supporting the local childcare economy. The executive summary will also report on local authority strategies implemented to address key concerns.

Previous assessments have tracked the impacts of the Covid-19 pandemic on the supply and demand for childcare. As the effects of the pandemic on the childcare market have eased, further challenges have emerged with the potential to impact on sustainability and sufficiency of the marketplace. These include economic factors and the high cost of living. This assessment will investigate the potential impacts of these challenges on the supply and demand for childcare, including feedback from childcare providers.

Executive Summary

- There continues to be a sufficient supply of childcare provision to meet current levels of demand. Further to the recovery in demand following the Covid-19 pandemic, provider feedback suggests attendance in provision and demand for places has stabilised over the past year. However, increasing childcare fees combined with current cost of living challenges may affect the affordability of childcare for some parents/carers. This in turn may lead to localised changes in demand and patterns of attendance.

- Further to a declining birth rate and early years population in recent years, current population projections indicate the early years population in Harrow should remain relatively stable over the next few years. This would suggest levels of demand for childcare may not fluctuate greatly. The current 'interim' population projections are the first to incorporate data from the 2021 Census, which has led to a downward revision of official estimates, particularly for London local authorities. It should be stressed that there is uncertainty around how well the census data captured specific

[1] *https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/718179/Early_education_and_childcare-statutory_guidance.pdf*

age-groups, particularly early years, so caution must be applied when making any firm assumptions around levels of demand based on the size of the 0-4 cohort.

- The total number of early years childcare providers continues to decline albeit at a slower rate than reported in 2022. Conversely, there has been a modest increase in the total number of childcare places available. The majority of closures remain in the childminding sector, whilst the decline in pre-school provision has slowed. Growth in day nursery provision accounts for the overall increase in places available across the early years sector. Providers continue to be burdened by financial challenges exacerbated by the pandemic and subsequent cost of living crisis. Provider feedback indicates the primary challenges to sustainability are the costs of energy, food and staff, insufficient funding rates for early education funding and parents' ability to pay for childcare. The recruitment and retention of staff also remains an issue. Confidence in sustaining provision increased last year, with feedback suggesting two thirds of providers were optimistic about the future. Levels of optimism remain unchanged this year, although with less emphasis on those feeling very optimistic and a small rise in those uncertain about sustainability. There remains a sizeable minority of providers facing severe financial difficulties and who are at risk of closure, the majority of which are childminders. Government plans for financial start-up incentives to attract new childminders and agency childminders from autumn 2023, may help to counter declining numbers.

- Harrow Families Information Service (FIS) shares local data on childcare sufficiency, identifying any gaps in provision with prospective providers, to help address any shortfalls and encourage new provision where it is most needed. Targeted support around business and operational modelling, financial sustainability and staff retention issues continues to be offered via the Local Authority.

- Over the past year, the overall quality of provision within the early years' sector has reduced very slightly, due to the decline in the quality of childminding provision. The quality of PVI and school-based nurseries remain unchanged since last year, with school nurseries maintaining their high standards. Although the quality of PVI nurseries in Harrow remains slightly below both regional and national comparators, the gap has narrowed over the past year. However, the gap in quality of childminding provision compared to regional and national figures has widened. The data for Harrow includes agency childminders who are inspected internally rather than by Ofsted. It is noticeable how the proportion of agency childminders with poorer inspection outcomes is higher than those registered directly with Ofsted. Targeted support is provided to settings judged less than 'good' by Ofsted, whilst resources, training and provider forums continue to support all provision. The Early Years Learning Partnership (EYLP) also offer peer to peer support and focus resources on addressing the quality of provision.

- There continues to be a sufficient supply of childcare provision to meet demand for funded childcare places. The overall number of providers offering early education funding entitlements has increased over the past year. The proportion of each provider type offering the entitlements has also increased or been maintained. Provider participation and assistance around implementation of funding entitlements is facilitated via funding workshops, training and one-to-one support.

- Take-up of funded early education for two year-olds in Harrow has traditionally been low, with the exception of last year when take-up was at record levels for the borough and above regional comparators. There has been a sizeable reduction in take-up this year, from the high base set in 2022. It now sits below both regional and national comparators. It is important to note that data used for take-up rates and comparisons is from the spring term census and take-up can vary considerably through the academic year. Actual numbers of funded two year-olds have also fallen, as the population of two year-olds and cohort of eligible children has decreased. Efforts continue to promote and stress the benefits of the entitlement to parents/carers.

- The take-up of universal funded early education for 3 and 4 year-olds has increased over the past year and is now at the highest recorded levels since this indicator has been reported in the borough. Take-up is above regional comparators and has risen above the national take-up figure for the 4 year-old age group. Numbers of children accessing the extended entitlement (30 hours funding) continues to increase and is at the highest levels recorded since it's roll-out, although the rate of increase shows signs of slowing.

- There has been a small reduction in the number of childcare providers and places available for school aged children over the past year, whilst holiday club provision continues to grow. The school aged population has been relatively stable in recent years but is expected to decrease over the next few years, especially in the primary and junior school age groups. This should place less pressure on school aged childcare provision, assuming current levels of supply and demand remain stable.

- Priority wards have previously been identified as those which have low numbers of childcare places and relatively high cohorts of early years children. However, the recent changes in ward names and boundaries has resulted in a re-distribution of childcare places and early years populations. Previously identified priority wards either no longer exist, have changed name, or have much smaller early years cohorts. Wealdstone North, Canons and Rayners Lane have been identified as having the fewest childcare places available with less than 100 each, however they contain average populations of early years children. Canons is the only one of these wards with considerable projected growth in the early years' population. Roxeth and Kenton East have large early years' cohorts, but average numbers of childcare places compared to other wards, so provision in these localities needs to be tracked closely. Parental choice is particularly limited in Kenton West and Wealdstone South, with only 2 providers operating in Kenton West and 5 in Wealdstone South. The corresponding number of places available in these wards is also low. These findings continue to be highlighted to enquirers interested in setting up new provision and existing providers looking to expand in Harrow, in order to encourage new provision in these wards.

- Since the changes to some of the ward boundaries in Harrow, Greenhill and Marlborough are no longer the wards with the largest early years' cohorts, although they remain considerable. However, along with Canons they are the three wards with the greatest predicted growth in the early years' population over the next several years. The current supply of childcare places in Canons is very low, so focus on new provision is required here. Levels of provision in Greenhill and Marlborough have traditionally been some of the highest in the borough, however supply in these wards has been decreasing slowly so must be watched closely in order for sufficient provision to be maintained, especially with various re-developments and growth expected in these localities. North and South Wealdstone (formerly Wealdstone), are also the focus of large scale redevelopments in the heart of Harrow. Particular attention on new provision will be needed here to cope with potential increased demand, in areas with already low supplies of childcare provision.

- The number of wards with a limited choice of provider types for parents/carers has increased. This seems to correlate with the introduction of newly defined wards in the borough as well as the overall decline in the number of childminders and pre-school/playgroups. Kenton West, Canons, Centenary, Edgware, Rayners Lane and Wealdstone North contain no pre-school provision. Kenton West is the only ward to have no childminders operating and North Harrow is the only ward without a day nursery. Harrow wards are mostly small in area and neighboring wards generally offer an alternative choice of provision.

- Childcare for children with special educational needs and disabilities (SEND) is available in Harrow. The number of early years children with SEND has decreased within PVI settings over the past year, whilst there was a very slight increase in school nurseries. There was a more significant increase of children with SEND in school reception. The primary need for the majority of children requiring SEND support, remains communication and interaction. Support strategies continue to assist early years' childcare providers in meeting the needs of children with SEND, via the Harrow Early Years SEND Team. These include an inclusion fund which supports and enables SEND children to access learning and make progress across all early learning goals, SEND surgeries to support providers in identifying need and termly collation of SEND registers to ensure children are tracked and supported accordingly. The Early Years Area SENCO continues to track the progress of all children supported through the inclusion fund.

Demand for childcare

Population of early years children

In total, there are approximately 15,400 children under the age of five living in Harrow. These children may require early years' childcare. The latest population estimates are based on the Greater London Authority (GLA) 2021 based trend projections, published in January 2023. These are 'interim' projections with complete official estimates due in November 2023[2]

Table 1: Early years population by age[3]

Age	2020	2022	2023	2025	2027	2029
Age 0	3400	3300	3200	3400	3300	3300
Age 1	3300	2900	3200	3200	3300	3200
Age 2	3300	3100	2900	3100	3200	3200
Age 3	3300	3000	3100	3000	3100	3100
Age 4*	3300	3100	3000	2800	3000	3100
Total:	**16,600**	**15,400**	**15,400**	**15,500**	**15,900**	**15,900**

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

The GLA projections report that the early years' population in Harrow has declined quite considerably since 2020, with a minimum figure expected in 2023. It is then projected to remain relatively stable, with perhaps a slow rate of growth into the second half of the decade.

It should be noted that the age group population data presented in Tables 1 and 2, are averages taken from 3 principal variant scenarios produced using different assumptions that comprise the GLA 2021 trend-based projections. This has changed since last year when 4 variant scenarios were used. The most recent 'interim' data has produced significantly lower population figures for the early years age group compared to previous projections, especially between 2020-2023. However, the recent declining trend remains unchanged, albeit with the lowest figures occurring earlier than previously projected, when numbers had been expected to continue falling slowly towards the end of the decade.

In 2022, changes were made to some of the electoral ward names and boundaries in Harrow. There are now 22 wards in the borough, instead of 21 previously. Therefore, direct comparisons to previous ward analysis are no longer viable and the newly defined wards will be used from this year's report onwards. As a result of these changes, the distribution of the early years' population by ward, has also altered. A brief overview of the wards with the largest and smallest early years cohorts is outlined below[4]:

- Wards with the highest early years' population:
    - Edgware
    - Roxeth
    - Headstone

[2] *https://data.london.gov.uk/blog/new-population-projections-for-london-building-on-the-2021-census/*

[3] *GLA trend-based population projections (Jan 2023): The population projections have been rounded to the nearest 100*

[4] *GLA housing-led ward population projections (Jan 2023)*

  - Kenton East
  - Greenhill
- Wards with the lowest early years' population
  - Hatch End
  - Canons
  - North Harrow
  - Rayners Lane
  - Kenton West
- Wards with appreciable projected growth of the early years' population (up to 2029):
  - Marlborough
  - Canons
  - Greenhill

Of the wards with the highest early years' populations, 4 out of 5 are located on the southern periphery of Harrow sharing borders with neighboring boroughs. There is no discernible geographic trend to the locations of the wards with the lowest early years' populations. Only 3 wards are expected to experience appreciable (greater than 15%) growth by 2029, Marlborough and Greenhill in central Harrow and Canons in the east. All remaining wards are projected to experience only minor deviations in population either up or down, by 2029.

Therefore, overall expected demand for childcare by the early years age group in Harrow looks set to remain relatively stable over the next several years. The most significant potential impacts on demand are likely in and around the growth wards of Marlborough, Canons and Greenhill. This assumption is based on population projections only.

Population of school age children

In total there are 22,700 children aged 5-11, and 10,300 children aged 12-14 living in Harrow. These children may require childcare before and after school, and/or during the school holidays.

Table 2: Population by age[5]

Age	2020	2022	2023	2025	2027	2029
Age 5	3200	3200	3100	3000	3000	3000
Age 6	3300	3200	3200	3000	2800	2900
Age 7	3300	3200	3200	3100	3000	2900
Age 8	3300	3200	3200	3200	3000	2700
Age 9	3400	3400	3300	3200	3100	3000
Age 10	3200	3300	3400	3200	3200	3000
Age 11	3200	3300	3300	3300	3200	3100
Total 5-11:	**22,900**	**22,800**	**22,700**	**22,000**	**21,300**	**20,600**
Age 12	3300	3300	3400	3400	3200	3200
Age 13	3200	3300	3400	3400	3300	3300
Age 14	3300	3400	3500	3600	3500	3400
Total 12-14:	**9,800**	**10,000**	**10,300**	**10,400**	**10,000**	**9,900**
Total 5-14:	**32,700**	**32,800**	**33,000**	**32,400**	**31,300**	**30,500**

[5] *GLA trend-based population projections (Jan 2023): The population projections have been rounded to the nearest 100*

Table 2 Summary:

- The school age population projections from 2025 onwards, deviate from those reported last year with a more significant reduction in the school age population now expected.
- A notable decline in the 5-11 year old age group is expected over the next several years, following a slow fall over the past few years. Conversely, the 12-14 year old age group has been slowly increasing over the past few years, but a slow decline is also projected from 2025 onwards. The variation between 2020-2029 for this age group is less than for the younger age group.

Number of children with special educational needs and disabilities

Children with special educational needs and/or disabilities (SEND) are entitled to support with childcare up to the age of 18 (age 14 for children who do not have a special need or disability). The number of children with an Education, Health and Care (EHC) plan in our Local Authority is:

Table 3: Number of children 0-18 with an EHC plan in Harrow[6]

Age	Number of children 2022	Number of children 2023
Birth to school age	38	22
Primary school (reception to year six)	784	880
Secondary school (year seven to thirteen)	872	935
Total:	**1694**	**1837**

The number of children with an EHC plan includes children and young people whose resident address is within the London Borough of Harrow. These numbers include children who attend provision outside the Harrow Local Authority area. These are children and young people for whom the London Borough of Harrow has a direct responsibility.

Table Summary:

- There were 16 fewer children in the early years age group (birth to school age) with an EHC plan in 2023 compared to 2022, representing a 42% decrease year on year. This reduction may in part be due to a declining early years age group.
- School aged children with EHC plans have increased in 2023 compared to 2022:
  - Primary school: +96 children (12% increase year on year)
  - Secondary school: +63 children (7% increase year on year)

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 up to 20 weeks from referral when possible needs being identified to an EHC plan being issued. Some children have SEND but will not require an EHC plan. These children may have lower-level needs and require SEN support.

[6] *Harrow SEN2 statutory return January 2022 and 2023*

SEND within Early Years

An inclusion fund is provided for 3 and 4 year old funded children within PVI settings (including childminders) and school nurseries in receipt of 15 or 30 hours funding, who are on the early years SEND register and require SEND support. The purpose is to support children with emerging SEND/additional needs, so they can be meaningfully included in the learning experiences, social and cultural life of their setting/school. It is a targeted resource to provide targeted services and support outside of the school/settings expected remit, for children with additional needs/emerging SEND. Children with an EHC plan are also recorded by PVI settings. Inclusion funding has evolved since its inception and now comprises of the following two streams:

- **Targeted Block Funding**: The purpose of this fund is to support and improve the progress and attainment of all 3 and 4 year old children with SEND in literacy and numeracy (*a total of* 4 *successful bids were funded over the three school terms during the 2022/23 academic year*).

- **Specific Child Fund**: for individual children with emerging needs identified across the 4 categories of SEND. The fund supports children with therapies and access to learning and development, for example via 1:1 support or supporting staff through training and mentoring. A three-tier evidence-based system has been introduced, (Tier 1 – universal offer / Tier 2 – targeted offer / Tier 3 – enhanced offer) with each successive tier requiring additional levels of evidence to ascertain need. Once applications are received, a panel discusses and agrees the funding tier to be awarded. Claims for tiers 1 and 2 can be made on a termly basis, whereas tier 3 is a one-off payment whereby the setting is applying for an EHC plan. (*1661 claims during the 2022/23 academic year across all provider types – 260 fewer claims or a 14% decrease compared to the previous academic year*).

SEND within PVI Settings

Table 4: Number and percentage of 3 and 4 year-olds in PVI settings by SEN provision[7]

Harrow SEN				
PVI Settings				
	2022		**2023**	
SEN Provision	**Number of Pupils**	**% of Pupils**	**Number of Pupils**	**% of Pupils**
SEN Support (*Inclusion claims*)	547	16.8%	473	14.2%
EHCP	29	0.9%	13	0.4%
No SEN	2688	82.3%	2840	85.4%
Total funded 3&4 year-olds	**3264**	**100%**	**3326**	**100%**

Table Summary:
- In Summer 2023, 3326 pupils aged 3 and 4 were funded in PVI settings

[7] *PVI funding headcount data and Early Years inclusion funding claims Summer 2022 and 2023 (via Early Years SEN Inclusion Funding Team)*

- 14.2% of funded pupils were on SEND support (2.6% decrease year on year).
- 0.4% of funded pupils were SEND with an EHC plan (0.5% decrease year on year).
- 85.4% of funded pupils have no SEND (3.1% increase year on year).

Chart 1: Number and percentage of pupils receiving inclusion funding by SEN Primary Need

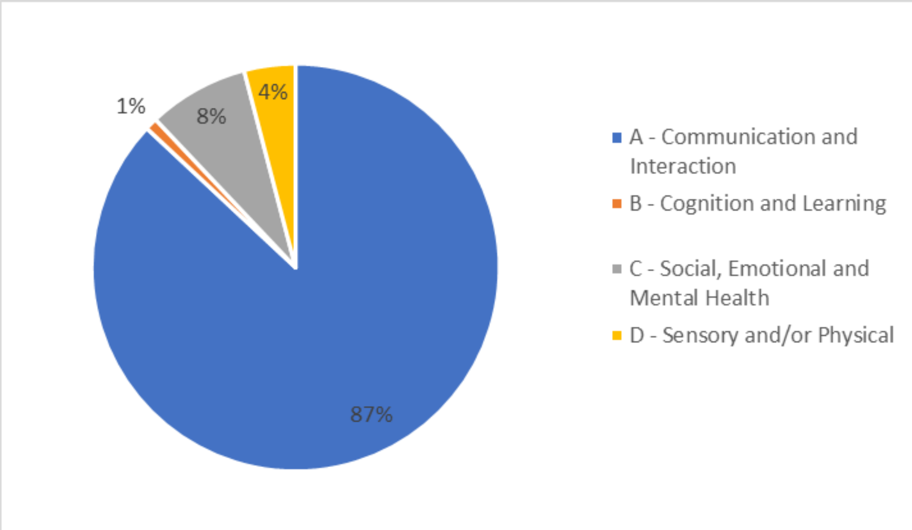


Chart Summary:

- The most common primary need of all funded SEND pupils is Communication and Interaction at 87%. This represents a 4% increase year on year.
- This is followed by:
    - Social, Emotional and Mental Health at 8% (3% decrease year on year).
    - Sensory and/or Physical at 4% (1% decrease year on year).
    - Cognition and Learning at 1% (no change year on year).

Harrow continues to offer a Disability Access Fund for funded 3 and 4 year-olds in PVI childcare settings and school nurseries who are in receipt of Disability Living Allowance. This is a one-off lump sum payment to support their learning and additional needs. There were 24 successful DAF claims made in the 2022/23 academic year.

SEND within School Nursery and Reception

Table 5: Number and percentage of pupils in School Nursery by SEN provision[8]

Harrow SEN				
NCY Nursery				
	2022		2023	
SEN Provision	**Number of Pupils**	**% of Pupils**	**Number of Pupils**	**% of Pupils**
SEN Support	72	6%	75	6.7%
EHCP	9	0.8%	9	0.8%
No SEN	1110	93.2%	1042	92.5%
Total	**1191**	**100.0%**	**1126**	**100%**

[8] *Harrow School Census 2022 and 2023*

Table 5 Summary:

- In January 2023, 1,126 pupils were in School Nurseries.
- 6.7% of pupils were on SEND Support (75 pupils). This represents a 0.7% increase year on year.
- 0.8% of pupils were SEND with an EHC plan (9 pupils). No change since last year.
- 92.5% of pupils have no SEND (1042 pupils). This represents a 0.7% reduction year on year.
- Overall, there are 84 SEND pupils in School Nurseries. This represents a 0.7% increase in the proportion of school pupils with SEND year on year.

Table 6: Number and percentage of pupils in Reception by SEN provision[9]

Harrow SEN				
NCY – Reception				
	2022		2023	
SEN Provision	**Number of Pupils**	**% of Pupils**	**Number of Pupils**	**% of Pupils**
SEN Support	226	7.4%	311	9.8%
Statement/ EHCP	63	2.1%	78	2.4%
No SEN	2769	90.5%	2787	87.8%
Total	**3058**	**100%**	**3176**	**100%**

Table Summary:

- In January 2023, 3176 pupils were in Reception classes.
- 9.8% of pupils were on SEND Support (311 pupils). This represents a 2.4% increase year on year.
- 2.4% of pupils were SEND with an EHC plan (78 pupils). This represents a 0.3% increase year on year.
- 87.8% of pupils have no SEND (2787 pupils). This represents a 2.7% reduction year on year.
- Overall, there are 389 SEND pupils in Reception classes. This represents a 2.7% increase in the proportion of reception pupils with SEND year on year.

The most common primary need of SEND Support pupils in School Nursery and Reception classes remains Speech, Language and Communication Needs. The most common primary need of SEND pupils with an EHCP in School Nursery and Reception classes remains Autism Spectrum Disorder.

Harrow Local Offer

The Harrow Local Offer is a focused online resource providing a central point of information, advice and support in the local area about services for children and young people aged 0-25 with special educational needs and disabilities. It was created jointly by parents and professionals fulfilling the Local Authority's statutory requirements. Services and support are available across early years, education, employment and training, health, leisure and social care.

[9] *Harrow School Census 2022 and 2023*

Provider Survey Findings – changes in the demand for childcare

Further to the recovery and relative stabilisation in the demand for childcare post Covid-19 pandemic, new patterns of demand have been established. However, new considerations such as the economic impacts of the cost-of-living crisis, may impact on families' requirement for and affordability of childcare.

PVI nursery providers and childminders in Harrow have been surveyed about levels of demand for childcare since 2020. The results of the spring term 2022 and spring term 2023 surveys, comparing feedback with the corresponding school terms in the previous year are displayed in Chart 2:

Chart 2: Demand for childcare places as reported by Harrow childcare providers

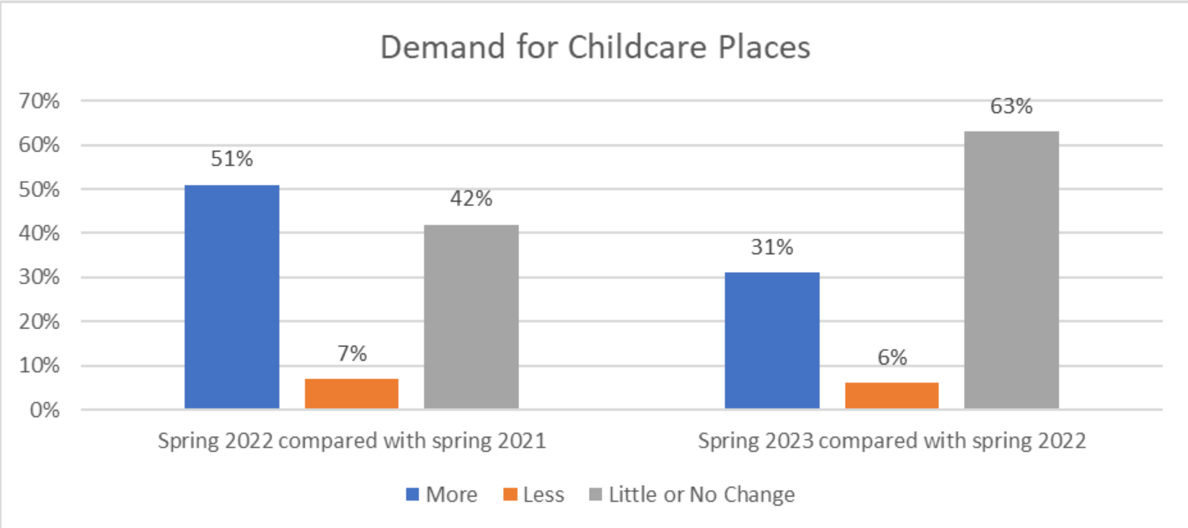


Chart Summary:
In the spring term 2022:

- 51% of providers that responded, reported higher demand for places compared to the spring term 2021, with 42% reporting little or no change. This signalled a recovery compared with the previous spring, when impacts of the Covid-19 pandemic on demand for childcare were more apparent.
  - Feedback suggested that the recovery in demand was greater in PVI settings compared with childminders. Only 3% of PVI settings reported lower demand compared with the previous spring compared to 18% of childminders.

In the spring term 2023:

- 31% of all providers that responded, reported higher demand for places compared to the spring term 2022.
- 63% reported little or no change.
- 6% reported lower demand.
  - *PVI nurseries*: 32% reported higher demand, 62% little or no change and 6% lower demand
  - *Childminders:* 27% reported higher demand, 67% little or no change and 6% lower demand
- Of those providers that supplied comparative figures for children on-roll in the spring term 2023 compared to the spring term 2022:
  - 52% had more children on roll, 21% had the same numbers and 27% had

fewer children on-roll.

Provider feedback suggests that overall demand for childcare places had increased in the spring term 2022, compared with the previous spring, but has since stabilised somewhat with almost two thirds of respondents signaling little or no change by the spring term 2023.

Providers were also asked whether they have increased charges made to parents over the past year:

- 65% of providers indicated they have increased charges made to parents
    - *59% of PVI settings and 80% of childminders that responded*
- 27% of providers have also increased charges made to parents over and above regular fees (additional charges for extras such as nappies, food and refreshments)
    - *26% of PVI settings and 27% of childminders that responded*

Increased fees combined with current cost-of-living pressures may impact on levels of demand for childcare. With almost two thirds of respondents increasing fees and over a quarter increasing charges for additional extras, it is likely to affect some families' ability to afford childcare and therefore levels of demand, especially for non-funded children.

Supply of childcare

Number of early years providers and places

In total, there are 251 childcare providers in Harrow, offering a maximum of 7,511 early years' childcare places.

Table 7: Number of early years' providers and places

Type of provision	***Number of providers***	***Number of registered places***
Childminders*	111	714
Nursery classes in schools	28	1404
Maintained nursery schools	1	102
Private, voluntary and independent nurseries	111	5291
Total:	**251**	**7511**

*The data in this table was correct on: 01 May 2023. *Some childminder places may also be available for older children.*

For private, voluntary and independent nurseries (PVI) and childminders, the number of registered places represents the maximum number of children who can be on the premises at any given time. In practice, many providers choose to operate below their number of registered places. Children may attend childcare full time or part time. The table above records places for children who are attending full time, or for as many hours as the setting is open. In some cases, two or more children attending part time may use one full time equivalent place. For example, one child may attend in the morning and one child may attend in the afternoon.

Table 7 Summary:

- Nursery classes in schools and maintained nursery schools offer 20.1% of all registered early years' childcare places available in Harrow, 0.4% down on last year; however, these places are for 3 and 4 year-olds only.
- The private, voluntary and independent (PVI) sector, offer the remaining 79.9% of early years' childcare places, which are available across the early years' age group (0-4 year-olds). This is 0.4% up on last year. The PVI sector includes day nurseries (open through the day), pre-school/playgroups (open part-time), independent school nurseries and Ofsted registered childminders.
- Year on year, there has been a reduction of 11 early years' providers (childminders) but an increase of 35 registered places, all of which were in the PVI sector.

Harrow had a total of 6,005 early year's childcare places for children within the PVI sector as of May 2023. These places are available through:

- 78 day nurseries making available 4,142 places for children aged 0-4 years (69% of all PVI places) and 27 playgroups/ pre-schools making available 871 places for children aged 0-4 years (14.5% of all PVI places).
- 111 childminders making available 714 places for children aged 0-4 years (11.9% of all PVI places).
- 6 independent schools with under 5's nurseries making available 278 places for children aged 0-4 years (4.6% of all PVI places).

An overview of the location of early year's settings in Harrow is mapped in Figure 1.

Table 8: Number of PVI providers and places by year

	2022		***2023***	
Provision type	***Number***	***Places***	***Number***	***Places***
Day Nursery	76	4026	78	4142
Pre-school / Playgroup	28	862	27	871
Childminders	122	742	111	714
Independent School Nursery	7	314	6	278
Total:	**233**	**5944**	**222**	**6005**

As recorded on 01 May each year. The number of places are based on full-time equivalent places. Some places are sessional so 1 full-time place could in theory serve 2 children.

Table Summary:

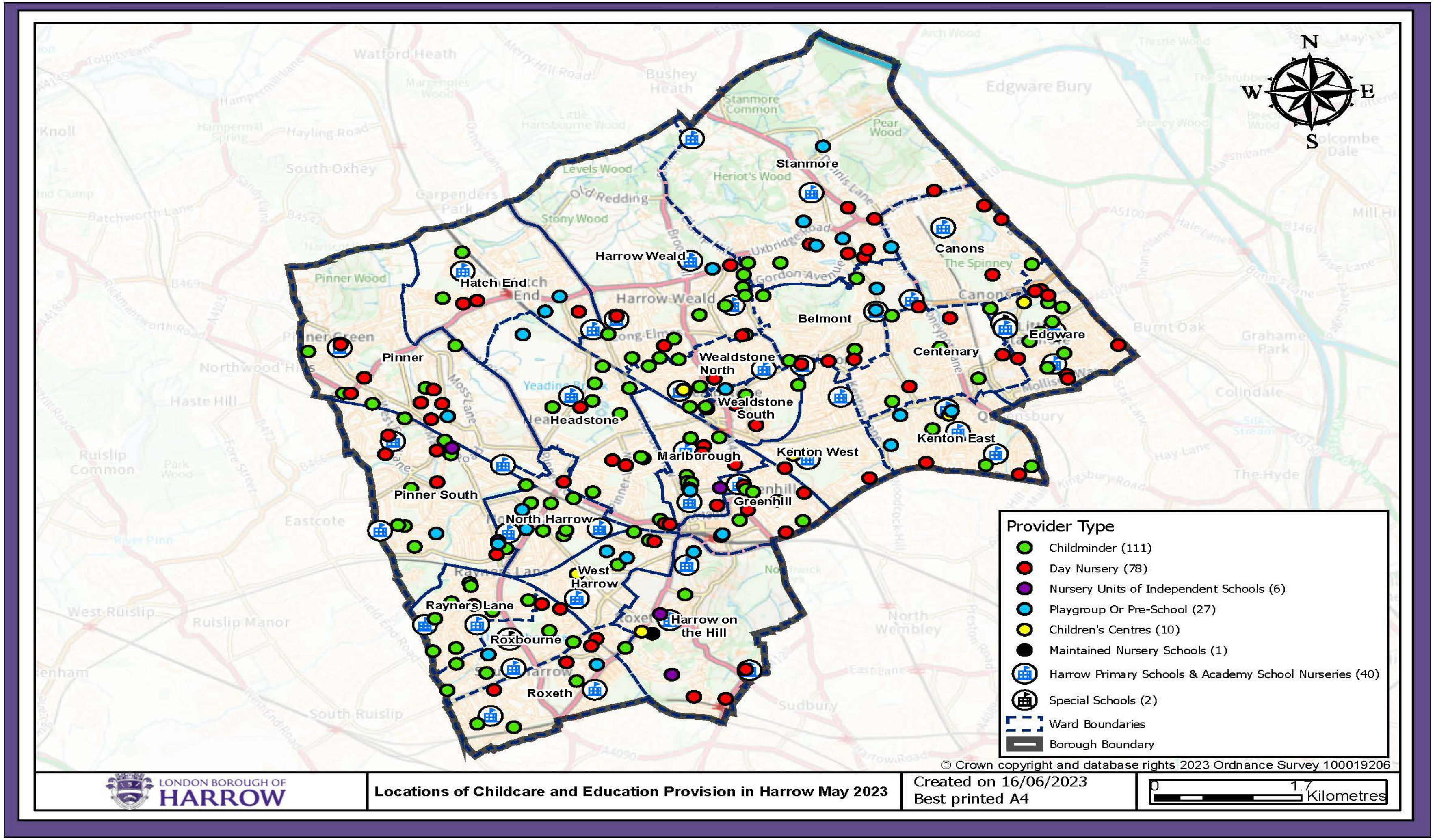
- The total number of PVI providers in Harrow has reduced by 11 in the past year. This continues the trend of declining numbers over the past several years, with the exception of 2021 when numbers increased.
    - There has been a reduction of 1 pre-school/playgroup and 11 childminders over the past year, continuing the trend of declining numbers of these provider types.
    - There has been an increase of 2 day nurseries over the past year. This continues the growth of this provider type in recent years, with the exception of 2022 when numbers fell by one.
    - Although there appears to be 1 less independent school nursery than last

year, this is because 2 providers previously counted separately that operated in the same premises, now operate under one Ofsted registration and are therefore counted as one provider.

- Whilst the total number of PVI providers has fallen, the overall number of places available within them has increased slightly. There has been an increase of 61 places between 2022 and 2023, representing 1% overall growth in the past year:
    - 2.9% increase in the number of places available within day nurseries.
    - 1% increase in the number of places available within preschool/playgroups.
    - 3.8% decrease in the number of places available within childminding settings.
    - 11.5% decrease in the number of places available within independent school nurseries. This is because one nursery re-registered with Ofsted, and the new registration had less places available than the old one.

- The market share of day nursery places available continues to increase (1.3% annual increase in their overall share of places available within the PVI market). Conversely, the market share of childminding places available continues to fall and the share of independent school nurseries has also fallen over the past year. The market share of pre-school/playgroup places remains unchanged.

Figure 1: Location of early years settings in Harrow



Ward Overview

Analysis of the supply of PVI childcare are conducted each year to identify provider numbers, places and types by ward and any changes since the previous assessments. However, this is the first year to use the new electoral wards in Harrow for analysis, from which comparisons and changes can be identified in future assessments. A summary of the key findings are provided below:

- Wards with the largest supply of PVI childcare places:
  - Stanmore: 528
  - Pinner: 495
  - Headstone: 483
  - Pinner South: 475
  - Marlborough: 457
  - Edgware: 418
  - Greenhill: 379

The wards with the largest supply of childcare places can generally be found in west-central and north-western Harrow, with the exceptions of Stanmore and Edgware in the east

- Wards with the lowest supply of PVI childcare places
  - Wealdstone North
  - Canons
  - Rayners Lane
  - Kenton West
  - Wealdstone South
  - West Harrow
  - North Harrow

The wards with the lowest supply of childcare places are scattered throughout the borough but include a cluster of wards in east-central Harrow and another in the southwest.

- Generally, wards with a larger number of day nurseries, have higher proportions of childcare places available.
- The wards with the lowest number of PVI childcare providers are Kenton West with only 2 providers and Wealdstone South with 5 providers.
- The majority of wards contain a choice of provider type for parents/carers, however there are a growing number of wards with limited choice. Kenton West has no childminders or pre-schools operating, Canons, Centenary, Edgware, Rayners Lane and Wealdstone North have no pre-schools operating and North Harrow has no day nurseries. Centenary, North Harrow and Wealdstone North are all new wards.

Early years vacancies

Table 9: Early years vacancies

Type of provision	*Number of providers*	*Number of providers with vacancies*
Childminders	111	24
Nursery classes in schools	28	24*
Maintained nursery schools	1	1
Private, voluntary and independent nurseries	111	41

*Data in this table was correct on 01 May 2023. *As reported in the School Census January 2023*

A vacancy is a place that could realistically be used by a child and can be full or part-time. 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. We ask providers to report vacancies to us so we can help promote them. Not all choose to do this, so vacancy rates may be higher than recorded. Typically, vacancy rates are higher in the autumn, when many children move to school.

Table Summary:

- 22% of childminders reported having vacancies available.
- 86% of nursery classes in schools had vacancies available in January 2023. Several of these only had one or two places available and were close to capacity.
- Vacancies were available within the one Harrow maintained nursery school.
- 37% of private, voluntary and independent nurseries reported having vacancies available.
- 36% of all early years' providers reported having vacancies, 5% higher than recorded in the 2022 assessment. There was a 2% increase in childminders, 11% increase in nursery classes in schools and a 5% increase in private, voluntary and independent nurseries reporting vacancies.

Number of school age providers and places

In total, there are 40 providers of childcare for school age children during term time, and 22 providers of childcare for school age children during the holidays. There are also 111 childminders who may provide care for school age children.

Table 10: Number of school age providers and places

Type of provision	*Number of providers*	*Number of registered places*
Breakfast club – primary school	11	352
After-school club – primary school	21	767
Breakfast club – secondary school	3	140
After-school club – secondary school	1	40
Breakfast club – other	1	40
After-school club – other	3	108
Childminders	111	714
Holiday club	22	1193

Tracking supply of childcare for school age children is difficult because not all of this type of provision is registered with Ofsted. Some schools may also have out of school club provision under the school's own Ofsted registration. Most of these clubs are only available to children attending the schools. As not all such clubs are widely advertised, it is possible that we have under-counted the provision of breakfast and after school clubs and holiday clubs.

Table 10 Summary:

- The majority of breakfast and after school clubs operate within primary schools, catering for primary school aged children, with significantly lower availability within secondary schools. Changes to school age childcare provision over the past year:
    - The number of childcare providers for school age children has reduced by 2 over the past year. The number of registered places across these providers has reduced by 5.4% over the past year:
        - 12.4% reduction of places in breakfast clubs operating in primary schools.
        - 4% reduction of places in after school clubs operating in primary schools.
        - No changes to the number of places in breakfast and after school clubs at secondary schools or other sites.
- The number of childminders and places available has reduced over the past year, potentially affecting the availability for school aged children.
- There are 22 Ofsted registered holiday clubs in Harrow offering childcare places for school aged children. This represents a net gain of 4 providers over the past year with 15.5% growth in places available. Parents may also use provision which is not considered 'childcare', for example sports or arts clubs, after school or in the holidays.

Impacts of current economic challenges on the supply of childcare

The supply of childcare has been tracked closely since 2020 to investigate specific impacts of the Covid-19 pandemic, and identify challenges faced by childcare providers during a period of heightened uncertainty and unpredictable demand for provision. Current economic challenges and uncertainty around cost-of-living pressures may also influence the supply and sustainability of provision. Therefore, a closer look at local information on new and closed provision over the past year and analysis of feedback from provider surveys around current economic challenges collated in spring 2023, are presented below.

New provider registrations and permanent closures:
Between June 2022 and June 2023:

- *PVI nurseries*: 8 new PVI nurseries have opened, including 6 day nurseries and 2 pre-schools. 7 PVI nurseries have closed, including 4 day nurseries and 3 pre-schools. Overall, there has been a net gain of 1 PVI nursery, an increase of 2 day nurseries and a loss of 1 pre-school.
- *Childminders*: 11 new childminders have opened and 22 have closed, resulting in a net loss of 11 childminders. Of those that have closed, 3 have moved borough and 19 have resigned;
    - There are 3 childminding agencies with a total of 9 childminders registered with them, operating in Harrow. One of these agencies will pause childminding operations this year. The two childminders affected will either be

registered to another agency or directly with Ofsted, so their provision in Harrow should continue.

- *School aged childcare*: 1 out of school club and 4 holiday playschemes have opened, whilst 2 out of school clubs and no holiday playschemes have closed, resulting in a net loss of 1 out of school club (which included breakfast and after school provision) and net gain of 4 holiday playschemes. Of the providers that closed, both were operating from primary school premises.

Decreasing numbers of childminders (with the exception of 2021) and pre-schools has been apparent over recent years, whilst day nursery provision has generally experienced growth. These trends continue in 2023. The decline of out of school club providers since the pandemic continues but the rate of decline has slowed considerably over the past year. Conversely holiday club provision continues to grow. Feedback from providers indicates there are a number of reasons for closures over the past year, including rising costs of overheads, food and energy, changes in patterns of demand for childcare since the pandemic and the inability to fill places (particularly in childminding provision).

Provider survey findings: Provider surveys over the past few years have gauged feedback on the concerns and challenges experienced by the early years childcare market and how these might impact on the sustainability and supply of childcare. Another survey was undertaken in spring 2023. PVI nurseries and childminders were asked how optimistic they feel about the sustainability of their businesses in the future, which can be compared to responses provided a year ago in spring 2022:

Chart 3: Provider confidence in business sustainability

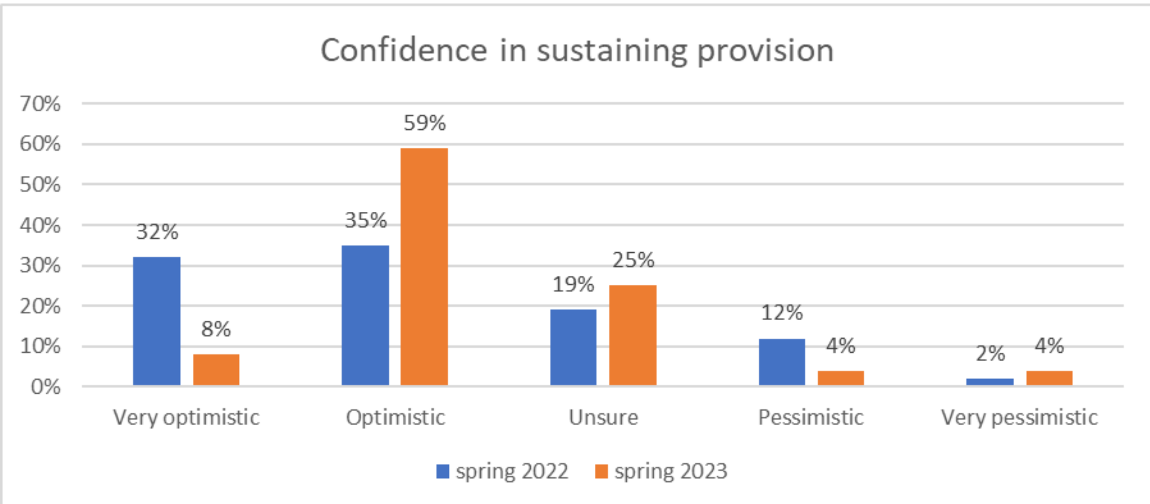


Chart Summary:

- Over two thirds or 67% of respondents were either optimistic or very optimistic about sustaining their provision in the future. This is the same percentage as recorded last year, however with large changes in the extent of optimism: 24% fewer respondents feeling very optimistic and 24% more respondents feeling optimistic:
  - 65% of PVI nurseries and 73% of childminders were either optimistic or very optimistic, down 4% for PVI nurseries and up 9% for childminders since spring 2022.
- A quarter of respondents were unsure about sustainability, an increase of 6% since

last year:
  - 29% of PVI nurseries and 13% of childminders were unsure, up 4% for PVI nurseries and 13% for childminders since spring 2022.
- 8% of respondents were pessimistic or very pessimistic about sustaining their provision in the future, down 6% from last year:
  - 6% of PVI nurseries and 14% of childminders were either pessimistic or very pessimistic, the same percentage as recorded last year for PVI nurseries and down 22% for childminders since spring 2022.

- Providers were also asked if they are facing severe financial difficulties (settings at substantial risk of having to cease operating or childminders at substantial risk of leaving the profession):
  - 16% of respondents answered yes (including 12% of PVI respondents and 27% of childminders), and 84% answered no. This is the same percentage as recorded last year with exactly the same breakdown of PVI and childminder responses.

- Difficulties in recruiting staff in early years settings were highlighted as a growing issue last year, and such concerns remain in 2023. Large numbers of staff vacancies have been advertised over the past year, many of which have taken a long time to fill, with some posts remaining unfilled as reported by providers. Providers were asked how difficult it is to recruit staff:
  - 69% of respondents answered very difficult of somewhat difficult, down 7% from last year.
  - 18% answered neither difficult or easy, up 12% from last year.
  - 3% answered somewhat easy, down 3% from last year.
  - 10% did not know, down 2% from last year.

- Providers were also asked if they had taken any steps to help business sustainability. Some of the most common steps taken were as follows:
  - 65% of respondents increased charges made to parents, up 25% from last year. 27% also increased charges over and above regular fees for additional extras, up 15% from last year.
  - 35% increased the number of free early education entitlement places they provide, up 14% from last year.
  - 29% increased the number of staff, up 6% from last year.
  - 22% increased their opening hours, down 1% from last year.

The provider survey also consulted PVI nurseries and childminders on how current challenges identified by the sector and cost-of-living pressures are impacting on the financial sustainability of their settings. Feedback is displayed in Chart 4:

Chart 4: Factors affecting the financial sustainability of provision

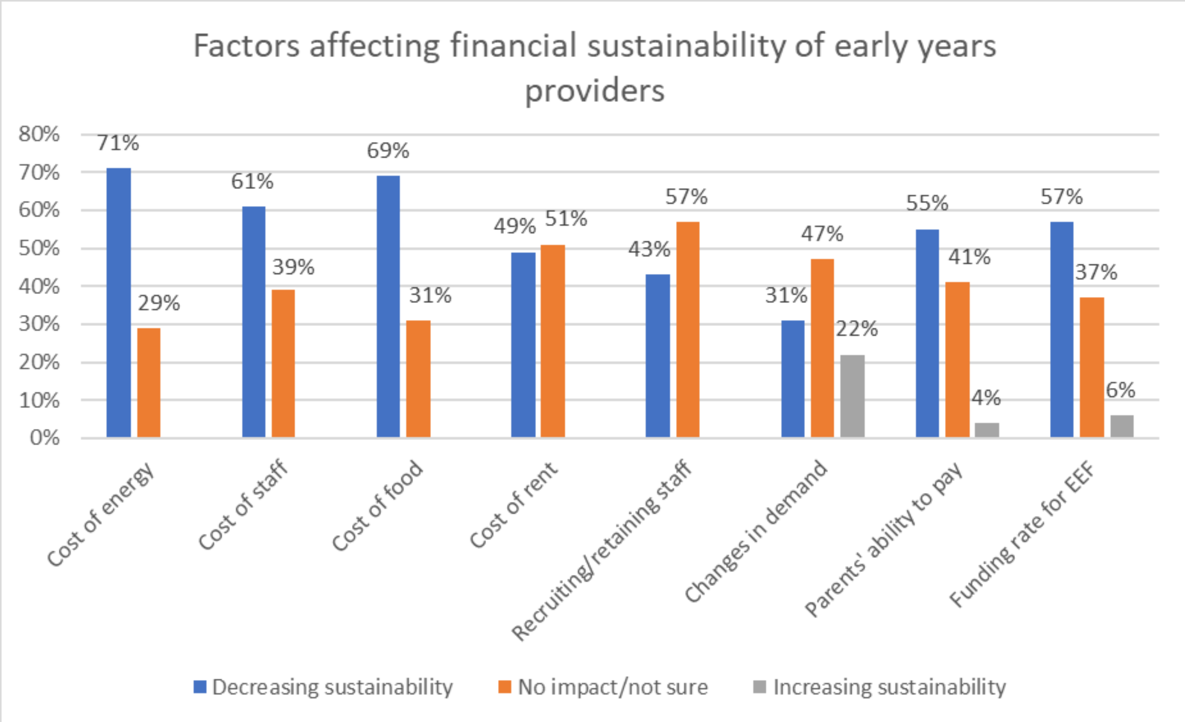


Chart Summary:

- More than 60% of respondents identified the cost of energy, food and staff were decreasing the financial sustainability of their settings. The remaining respondents all answered that these costs either had no impact on sustainability or they were not sure. For the cost of rent, answers were more evenly split between it decreasing sustainability and having no impact or being unsure.
- Recruiting and/or retaining staff was viewed by 43% of respondents as decreasing sustainability with the remaining 57% either unsure or viewing it as having no impact.
- Changes in demand for places attracted the most varied responses from providers, with 47% of respondents either unsure or believing there has been no impact. Almost a third believed it was decreasing sustainability and just over a fifth believed it was increasing sustainability.
- Over half of respondents believed that parents/carers' ability to pay for places was decreasing sustainability. Only 4% believed it was increasing sustainability.
- Over half of respondents thought the funding rate for early education funding entitlements was decreasing sustainability. Only 6% thought it was increasing sustainability.

Funded early education

Proportion of 2 year old children entitled to funded early education

In Harrow, 27% of 2 year-olds are entitled to funded early education, 1% higher than the previous year. This equates to around 797 children per year in 2022.

Take up of funded early education

The proportion of eligible children taking up their funded place (for at least some of the available hours) in Harrow is displayed in Table 11.

Table 11: Proportion of eligible children taking up their funded place in Harrow[10]

Age	% of eligible children	
	2022	2023
Age 2	*67%	60%
Age 3 and 4	86%	92%
3 year-olds	83%	87%
4 year-olds	89%	96%

* *Percentage for 2022 has been revised up by 4% due to local discrepancies in previous headcount data*

Table Summary:

- 60% of eligible 2 year-olds are taking up their funded place, leaving 40% who are not accessing their entitlement (*The 60% take-up figure is taken from Harrow funding headcount data as it is more current and accurate than the 55% take-up rate listed by the DfE*). There has been a 7% decrease in take-up since 2022.

- 92% of eligible 3 and 4 year-olds are taking up their funded place, 6% up on 2022 and the highest take-up rate for 3 and 4 year-olds recorded in Harrow. 8% of 3 and 4 year-olds are not accessing their entitlement
    - 13% of 3 year-olds are not taking up their funded place
    - 4% of 4 year-olds are not taking up their funded place

It should be noted that a proportion of those children not accessing their funded entitlements in Harrow, may well be doing so out of borough. It should also be noted that nursery attendance is not compulsory.

Table 12: Regional and national take up comparisons[11]

	Take-up: % of eligible children							
Age	Harrow		Outer London		London		England	
	2022	2023	2022	2023	2022	2023	2022	2023
Age 2	67%	60%	62%	65%	62%	65%	72%	74%
Age 3 and 4	86%	92%	86%	89%	82%	84%	92%	94%
3 year-olds	83%	87%	83%	86%	80%	82%	90%	92%
4 year-olds	89%	96%	89%	91%	85%	86%	94%	95%

Population estimates for 3&4 year-olds are likely overestimates and therefore the derived take-up rates are likely underestimates

[10] *Department for Education: Provision for children under 5 years of age January 2023 & Harrow early education funding headcount data spring term 2023*

[11] *Department for Education: Provision for children under 5 years of age January 2023 & Harrow early education funding headcount data*

Table 12 Summary:

- **2 year-olds**: Take up of funded places has fallen in Harrow over the past year, whilst it has risen both regionally and nationally. Take up in Harrow has now fallen behind regional comparators and remains below the national average, where the gap has widened:
    - 5% below the outer London borough average
    - 5% below the London average
    - 14% below the national average
- **3 and 4 year-olds**: Take up of funded places in Harrow remains above the London average and has risen above the outer London average, having been the same last year. However, it remains below the national average, where the gap has narrowed:
    - 8% above the London average
    - 3% above the outer London borough average
    - 2% below the national average
- **3 year-olds**: Take-up of funded places in Harrow remains above the London average and has risen above the outer London average having been the same last year. However, it remains below the national figure, where the gap has narrowed:
    - 5% above the London average
    - 1% above the outer London borough average
    - 5% below the national average
- **4 year-olds**: Take-up of funded places in Harrow remains above the London average and has risen above the outer London average having been the same last year. It has now also risen above the national average:
    - 10% above the London average
    - 5% above the outer London borough average
    - 1% above the national average

Providers offering funded early education places

Providers are paid directly by government for delivering funded early education. They are not required to offer it to parents, but of course parents may choose to use a different provider if they do not. Some providers offer a restricted number of funded places.

Table 13: Providers offering funded early education places

Type of provision	***Number of providers***	***Age 2 targeted***	***Age 3 and 4 universal 15 hours***	***Age 3 and 4 extended 30 hours***
Childminders	111	58%	63%	61%
State school nurseries	28	4%	100%	54%
Maintained nursery schools	1	100%	100%	100%
Private, voluntary and independent nurseries	111	81%	100%	84%

Table 13 Summary:

- **2 year old funding:** There are 156 childcare providers offering 2 year old funded places across all provision types, an increase of 4 providers year on year:

  - 100% of maintained nursery schools (1 provider)
  - 81% of PVI nurseries (90 providers): 1% increase in the PVI provider base year on year
  - 58% of childminders (64 providers): 8% increase in the childminder provider base year on year
  - 4% of state school nurseries (1 provider): unchanged since last year

- **3 and 4 year old universal 15 hours:** There are 210 providers offering 3 and 4 year old funded places for the universal 15 hours across all provision types, a decrease of 1 provider year on year:
  - 100% of maintained nursery schools (1 provider)
  - 100% of PVI nurseries (111 providers)
  - 100% of state school nurseries (28 providers)
  - 63% of childminders (70 providers): 5% increase in the childminder provider base year on year

- **3 and 4 year old extended 30 hours:** There are 177 providers offering 3 and 4 year old funded places for the extended 30 hours across all provision types, an increase of 4 providers year on year:
  - 100% of maintained nursery schools (1 provider)
  - 84% of PVI nurseries (93 providers): 1% increase in the PVI provider base year on year
  - 54% of state school nurseries (15 providers): 8% increase in the state school nursery provider base year on year
  - 61% of childminders (68 providers): 6% increase in the childminder provider base year on year

Extended entitlement – 30 hours funding

There have been six academic years or eighteen school terms since the national roll-out of the extended hours (30 hours) entitlement in September 2017. The entitlement targets working parents, enabling those that qualify to claim an additional 15 extended hours in addition to the universal 15 hours entitlement. When applying online via the Government's Childcare Support website, eligible parents are issued with eligibility codes, which they give to childcare providers in order for them to validate and claim the extended hours funding. Table 14, compares take-up of extended hours places over the past two academic years:

Table 14: Extended hours take-up in Harrow[12]

School term	Children accessing an extended hours place
Autumn 2021	815
Spring 2022	1187
Summer 2022	1411
Autumn 2022	915
Spring 2023	1222
Summer 2023	1452

[12] *Harrow early education funding headcount data*

Table 14 Summary:

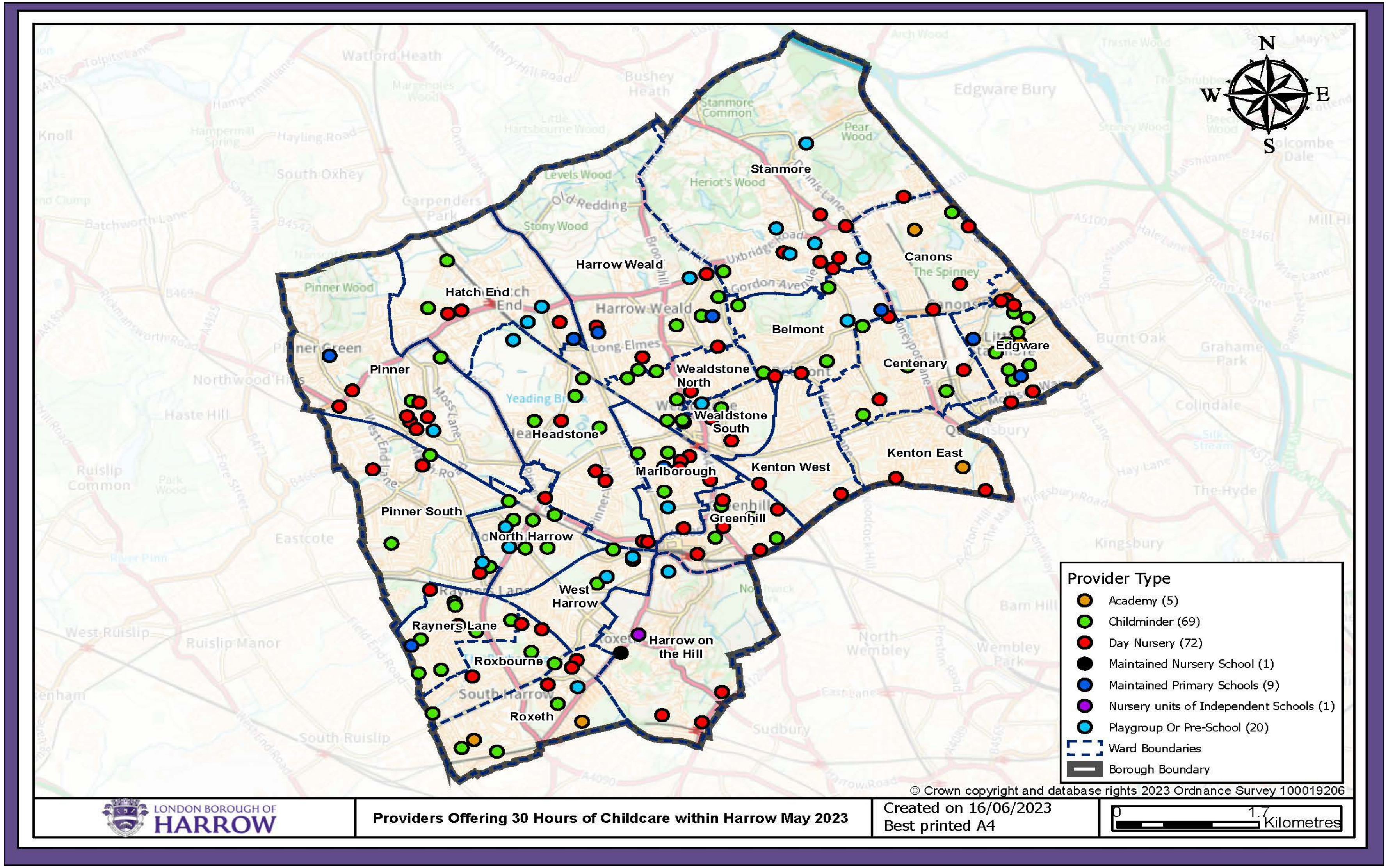
- Children accessing an extended hours place:
    - autumn 21 to autumn 22 - 12% increase
    - spring 22 to spring 23 - 3% increase
    - summer 22 to summer 23 - 3% increase
- The 2022/23 academic year has seen the highest take-up figures for each of the three school terms (compared to equivalent terms in previous years), since the roll-out of the extended hours entitlement in autumn 2017.
- When comparing like for like school terms, for example spring 2022 with spring 2023, there has been growth in the number of children accessing an extended hours place. The most significant growth occurred in the autumn term compared with the previous autumn, whereas growth in the spring and summer terms was more modest.
- Nationally 363,000, 3 and 4 year-olds were benefitting from the extended early education entitlement, based on the January 2023 early years census, up 4% from the previous year[13]. In comparison, figures from the same (spring) term in Harrow show a 3% increase from the previous year, 1% lower than the national rate of growth in take-up.

Providers offering extended hours

There are 177 providers offering approximately 1564, 30 hour or extended hour places as at May 2023, an increase of 4 providers and 125 places in the past year. The providers are mapped on Figure 2.

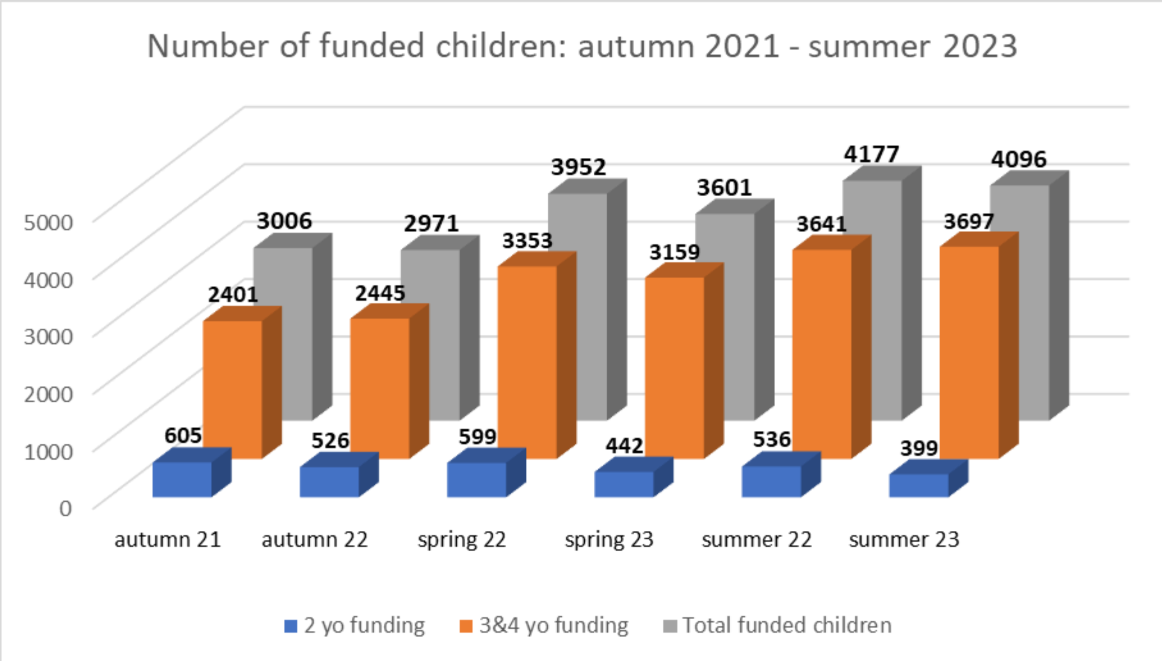
[13] *Department for Education: Provision for children under 5 years of age January 2023*

Figure 2: Map of providers offering extended hours places (30 hours)



Number of funded children

Chart 5: Number of funded children by term



**Includes funded places within PVI nurseries, funded childminders, academy school nurseries, one maintained nursery school and extended hours within state school nurseries*

A termly breakdown covering the period between spring 2019 and summer 2022 was presented in last year's assessment[14]. Numbers of funded 2, 3 and 4 year-olds for spring 2022 have been revised upwards significantly, due to discrepancies in previous headcount data.

Chart Summary:

- It should be noted that the total number of funded children in each term of the 2021/22 academic year were either close to or higher than before the Covid pandemic.
- All 3 terms in the 2022/23 academic year have seen a reduction in the total number of funded children when compared with like-for-like terms in the previous academic year:
  - Autumn 2022 compared to autumn 2021: 1.2% decrease (35 less children)
  - Spring 2023 compared to spring 2022: 8.9% decrease (351 less children)
  - Summer 2023 compared to summer 2022: 1.9% decrease (81 less children)
- This modest reduction in funded children for autumn 2022 and summer 2023 can be attributed to lower numbers of funded 2 year-olds, offsetting an increase in numbers of funded 3 and 4 year-olds. However, significant reductions in both funded 2 year-olds and 3 and 4 year-olds occurred in spring 2023 compared to the anomalously high numbers recorded in spring 2022:
  - Autumn 2022 compared with autumn 2021:
    - 2 year-olds (-79 children) / 3 and 4 year-olds (+44 children)

[14] https://www.harrow.gov.uk/downloads/file/31091/Childcare_Sufficiency_Assessment_Annual_Update_2022.pdf

- Spring 2023 compared to spring 2022:
  - 2 year-olds (-157 children) / 3 and 4 year-olds (-194 children)
- Summer 2023 compared to summer 2022:
  - 2 year-olds (-137 children) / 3 and 4 year-olds (+56 children)

The lower numbers of funded 2 year-olds reported in the 2022/23 academic year, corresponds with a decrease in the population of 2 year-olds in the borough (as reported in the Demand section of this report). The population of 3 and 4 year-olds has remained relatively stable over the past year. An increase in take-up of funded places and slightly higher numbers of out of borough children accessing funded places in Harrow, may account for the modest increase in funded 3 and 4 year-olds seen in the autumn 2022 and summer 2023. However, the significant reductions in funded 3 and 4 year-olds reported in spring 2023 is more difficult to explain, aside from the fact that numbers recorded in the previous spring were anomalously high. Surprisingly, take-up rates for 3 and 4 year-olds in spring 2023 were higher than recorded in spring 2022. This could partly be attributed to overestimates of the 3 and 4 year old population in previous DfE take-up figures, leading to underestimated take-up rates in past terms.

Expansion of Early Education Funding Entitlements

In the government's Spring Budget 2023, significant childcare reforms were announced including the proposed expansion of early education funding entitlements. The roll-out is expected in phases:

- April 2024 – 15 hours of free childcare for working parents of two year-olds.
- September 2024 – 15 hours of free childcare for working parents of 9 months to 3 year-olds.
- September 2025 – 30 hours of free childcare for every child over the age of 9 months with working parents.

Full details on eligibility criteria are yet to be confirmed for the expansion of the 15 hours entitlements, however criteria for the 30 hours offer is likely to match the existing criteria for 3 and 4 year-olds. Further guidance is expected in due course, and more information on at least the first phase of the roll-out will be included in next year's assessment.

As preparation begins in readiness for this expansion, many questions have been raised by local authorities, childcare providers, charities and childcare organisations, many of which remain unanswered or will remain so until the roll-out begins. These include how many more children will be entitled to funding locally?, will supply of provision be sufficient to meet demand?, how will providers be impacted financially (considering many traditionally fee-paying families will now be entitled to funding)? and will the funding rates be sufficient?. Concerns have also been raised about the impacts of historical expansions of funding entitlements, whereby provision for the most disadvantaged children including those with SEND have been negatively impacted.

Early Years Supplementary Grant

In addition to the expansion of funding entitlements, an additional £204 million was pledged in the spring budget for local authorities to increase the amount of funding paid to childcare providers for the existing childcare entitlement offers and other early years funding streams.

This will be known as the Early Years Supplementary Grant (EYSG) and is intended to cover the period from September 2023 to March 2024. This is a stand-alone top-up grant. It is expected to increase the funding rates to local authorities by an average of 32% for the current 2 year old entitlement and an average of 6.3% for the 3 and 4 year old entitlements when compared with the current 2023-24 rates.

Quality of childcare

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. Schools with nurseries have an overall inspection grade for the whole school and most also have a separate early years grade. Some settings are registered with the Independent Schools Inspectorate, which inspects under a different framework. Both schools and early years' providers have four possible Ofsted grades: 'outstanding', 'good', 'requires improvement', and 'inadequate'.[15] Some providers are still awaiting their first full inspection. These providers are excluded from our calculation

Table 15: Childcare provider inspection outcomes (May 2023)

Type of provision	***Total number of providers (excluding those not yet inspected and those with 'Met' or 'Not Met' outcomes)***		***% achieving good or outstanding***	
	2022	***2023***	***2022***	***2023***
Childminders	77	71	94%	90%
Nursery classes in schools *	24	24	100%	100%
Maintained nursery schools	1	1	100%	100%
Private and voluntary nurseries	94	98	95%	95%
Total	**196**	**194**	**95%**	**94%**

** Early years grade if available, otherwise overall school grade*

Table Summary:

- Overall, 94% (182 out of 194 providers) of inspected early years' childcare providers in Harrow are graded 'good' or outstanding' by Ofsted. This represents a drop of 1% year on year. This can be attributed to a reduction of quality in the childminding sector.
- This is the second consecutive year a reduction in quality has been reported, and is the lowest figure reported since 2018, which also recorded 94%. This reduction has occurred from a high base set between 2019-21.
- Quality remains highest in maintained and school nurseries with 100% of providers achieving 'good' or 'outstanding' Ofsted grades.

[15] *For more information see https://reports.ofsted.gov.uk/about-our-inspection-reports*

- Over the past year, childminders have seen a reduction of 4% in the percentage of ‘good’ or ‘outstanding’ providers, while the quality of PVI nurseries was unchanged.

Providers with met/not met grade

- When providers do not have any children on site at the time of their inspection, they are given an Ofsted grade of ‘met’ or ‘not met’. This shows whether they are meeting the requirements for Ofsted registration.

- In Harrow ‘met’ or ‘not met’ grades have only been issued to childminders. At present, we have 20 childminders with a ‘met’ grade and 2 childminders with a ‘not met’ grade. Those with ‘not met’ grades are issued with actions to put in place in order to meet Ofsted requirements and improve their practice.

National and regional comparisons

Table 16: Regional comparisons of quality[16]

% of providers ‘good’ or ‘outstanding’	*Harrow*		*London*		*England*	
	2022	*2023*	*2022*	*2023*	*2022*	*2023*
Childminders	94%	90%	95%	95%	96%	97%
Nursery classes in schools	100%	100%	94%	95%	89%	90%
Maintained nursery schools	100%	100%	97%	99%	99%	97%
Private and voluntary nurseries	95%	95%	97%	96%	97%	96%

It should be noted that regional data on inspection outcomes specifically for nursery classes within schools is not available. Data for primary school outcomes has been used instead, as their grading will most likely be the same as for the nursery classes within them, although not all primary schools have nursery classes attached. Data for Harrow is only based on primary schools that have nursery classes attached.

Table Summary:

- The percentage of ‘good’ or ‘outstanding’ nursery classes in schools and maintained nursery schools in Harrow remains higher than both the regional figures for London and national figures for England, however Harrow remains behind both comparators for childminders and PVI nurseries:
  - Nursery classes in schools: 5% higher than London and 10% higher than England. Both London and England figures have increased by 1% over the past year. Harrow has maintained the 100% figure since 2019.
  - Maintained nursery schools: 1% higher than London and 3% higher than England. The figure for London has increased by 2%, whilst for England it has fallen by 2% over the past year.

[16] https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-march-2023 & https://www.gov.uk/government/statistics/state-funded-school-inspections-and-outcomes-as-at-31-december-2022

  - PVI nurseries: 1% lower than both London and England. The figure for Harrow remains unchanged since last year but has decreased by 1% in London and England.
  - Childminders: 5% lower than London and 7% lower than England. Harrow has fallen further behind both comparators compared with last year. The figure for London remains unchanged but has increased by 1% in England.

Quality funding supplement

As part of Harrow's Early Years Single Funded Formula, a 'quality' funding supplement is awarded to early years' childcare settings, including school nursery/reception classes and funded PVI providers and childminders.

In 2018/19, Harrow considered the significant feedback received around workforce development and incorporated an option to reduce the quality supplement, in order to pool a fund. This enabled the establishment of an Early Years Learning Partnership Group, managed by PVIs, Childminders and maintained schools with nurseries to support system leadership and workforce development. This provided an opportunity to launch a program to support staff retention and development, review best practice across settings with peer to peer and leadership program partnerships and allow providers to have funding to manage and maintain their own workforce development, including subscriptions, training and peer to peer reviews. The cumulative impact is intended to help improve and maintain the overall quality of early years' provision in Harrow. The partnership group continues into 2023.

Methodology: sources of data

- Number of children: based on GLA population projections from the London Data Store.
- Children with EHC plans: based on data held by our local authority.
- Supply of childcare: based on data provided to us by Ofsted, who regulate early years provision in schools and childcare provision.
- Vacancy rates: obtained through feedback from providers via email and phone further to regular local authority requests for vacancy information.
- Funded early education: data on take up of funded early education entitlements is based on the Early Years and Schools Censuses, which are taken every January and published by the Department for Education in the statistical collection *Education provision: children under five years of age.* Internal funding headcount data is also used. Data on entitlement to a funded early education place for 2 year-olds is provided by the Department for Work and Pensions.
- Quality of childcare: data on childcare quality is provided by Ofsted.

Additional sources

- Provider Surveys: feedback used in the supply and demand sections.