

Childcare Sufficiency Assessment Annual Update – April 2012

Introduction

We are committed to supporting the development of good quality childcare across the borough to meet the needs of parents and carers, and their children, and which supports the wider social and economic development of the town. A Childcare Sufficiency Assessment (**CSA**) was completed in March 2011, to provide a basis on which future decisions can be made and to meet a statutory requirement placed on local authorities under section 6 & 11 of the Childcare Act 2006.

In addition, Section 11 of the 2006 Act requires local authorities to prepare an assessment at intervals not exceeding three years but also to keep it under review until it is superseded by a later one.

This review contains some updated information on the March 2011 published Childcare Sufficiency Assessment (CSA).

This document provides updates for the following datasets:

- GLA population projections 2010 Round, SHLAA © (Adjusted figures from the GLA 2009 forecast)
- Demand of childcare
- Current issues (including anecdotal evidence in 2012)

1.0 - Population¹

The most recent GLA projections (2010 SHLAA) are provided in Table 1 for the 21 Lambeth wards. This table provides updated population figures for the year 2012.

Table 1: Population of children aged 0-14 (2012)

Ward	0-2	3-4	5-9	10-14
Bishop's	277	223	523	458
Brixton Hill	663	389	870	601
Clapham Common	553	296	647	521
Clapham Town	537	331	846	776
Coldharbour	885	596	1,401	1,125
Ferndale	523	265	641	549
Gipsy Hill	731	416	917	797
Herne Hill	755	447	924	761
Knight's Hill	822	592	1,259	943
Larkhall	626	398	985	798
Oval	594	351	746	595
Prince's	652	404	929	710
St Leonard's	619	345	542	352
Stockwell	754	498	1,173	1,115
Streatham Hill	804	396	787	617
Streatham South	691	432	750	707
Streatham Wells	748	356	598	498
Thronton	678	434	945	834
Thurlow Park	584	298	584	492
Tulse Hill	698	470	1,061	805
Vassall	690	473	1,067	813
LAMBETH	13,883	8,412	18,195	14,867
-/+ CSA 2011 figs	+3.6%	+3.4%	+5.8%	+1.8%

Comments:

The Greater London Authority (GLA) adjusts their forecasts every year. These figures are used to form the basis of the CSA in identifying potential demand for childcare in Lambeth.

The figures displayed in **Table 1** are the adjusted numbers for 2012. This is an update from the published figures in the Childcare Sufficiency Assessment 2011 Report (CSA) – which uses the 2010 population figures.

Table 2 shows the GLA population forecast up to 2015 for the 0 to 4 age group. Those wards growing faster than the Lambeth average have been highlighted. Percentages have been rounded.

¹ Greater London Authority (GLA) 2010 SHLAA

Table 2: Population growth from 2012 to 2015 for children aged 0-4

Ward	0-4 (2015)	-/+ Growth*
Bishop's	500	-
Brixton Hill	1,063	+1%
Clapham Common	870	+3%
Clapham Town	895	+3%
Coldharbour	1,483	-
Ferndale	830	+5%
Gipsy Hill	1,165	+2%
Herne Hill	1,227	+2%
Knight's Hill	1,419	-
Larkhall	1,055	+3%
Oval	990	+5%
Prince's	1,115	+6%
St Leonard's	990	+3%
Stockwell	1,281	+2%
Streatham Hill	1,257	+5%
Streatham South	1,122	-
Streatham Wells	1,133	+3%
Thronton	1,170	+5%
Thurlow Park	895	+2%
Tulse Hill	1,158	-1%
Vassall	1,204	+4%
LAMBETH	22,820	+2%

* Percentage rounded. Showing figs +/- 1% or more only.
Highlighted wards growing faster than Lambeth average

2.0 - Demand for childcare

A survey was undertaken in 2012 to capture the views of Private, Voluntary and Independent (PVI) providers as well as Out of School (OOS) providers on their vacancy levels and childcare fees.

We asked providers two core questions shown below to give us an indication overall of changes to vacancy levels and perception to childcare fees:

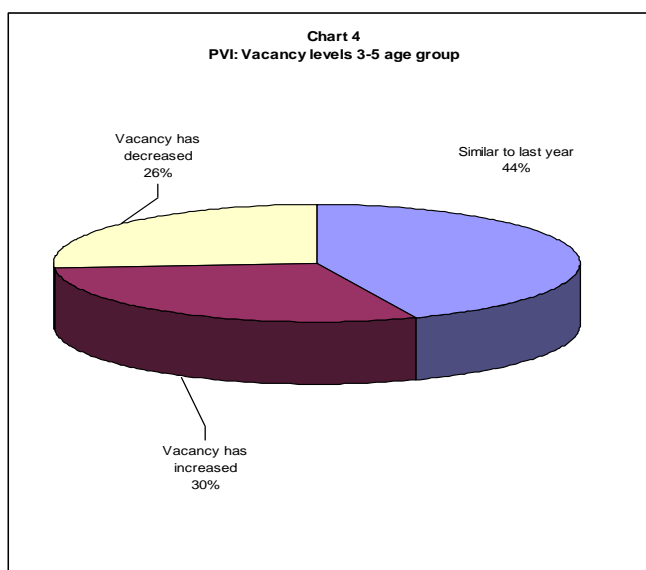
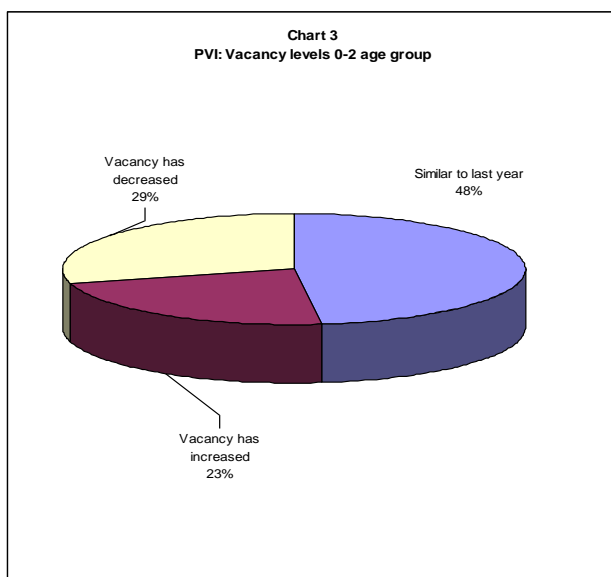
Core Questions:

1. Providers to compare their current vacancy levels with last year; and
2. Tell us their expectations regarding childcare fees for the coming year

2.1 – PVI vacancy levels in Lambeth

The response rate to the survey for PVI providers was 55% and 44% for OOS providers. Responses are shown in the following charts. Data could not be broken down by wards as sample size was too small. Responses are used to give us an overall indication only.

We asked providers to tell us **'what their vacancy level was like this year when compared to last year'** for children aged 0 to 2 and children aged 3 to 5. Results are shown in chart 3 and 4 by age group and are by **PVI** providers only who catered for children in these age groups (No childminder data).



Comments:

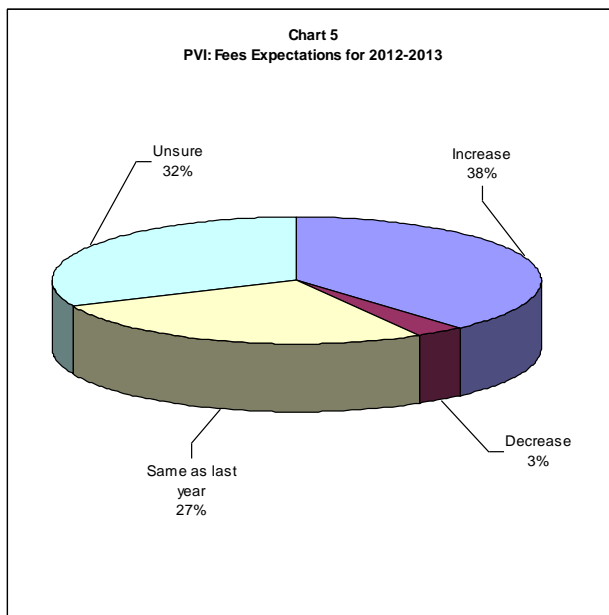
The data from the survey conducted in early 2012 cannot be broken into wards. Vacancy levels can change rapidly and the data collected is to provide a snapshot over the last 2 years (2010-2012).

Providers provided responses based on age groups; 0-2 and 3-5. Chart 3 shows responses for 0-2 age group and chart 4 shows responses for 3-5 age group. Vacancy levels give us an indication to the demand of or lack of demand in an area for childcare.

Overall 48% of providers say demand this year (2011-2012) is relatively the same as last year (2010-2011) for children aged 0 to 2 and 44% for children aged 3 to 5. The CSA 2011 Report (Gap Analysis) identifies areas where there may be lack of demand or increasing demand for childcare by wards.

2.2 – PVI childcare fees in Lambeth

The CSA 2011 Report provides a breakdown of average fees (per hour) charged by different types of providers in Lambeth. We asked PVI providers to tell us about their expectation for childcare fees in the coming year and chart 5 shows their responses.



Comments:

Chart 5 shows that majority of PVI providers (38%) expect fees to increase by an average of 5% in the coming year (2012-2013). 27% expect fees to remain the same as the year before and 3% expect a decrease. 32% of providers were still unsure of any fee changes.

The CSA 2011 Report reported average fees (per hour) for PVI at £4.96. This calculation excludes childminders, maintained nurseries, independent schools and pre-schools fees. Please refer to the **CSA 2011** full report to see ward by ward fees analysis.

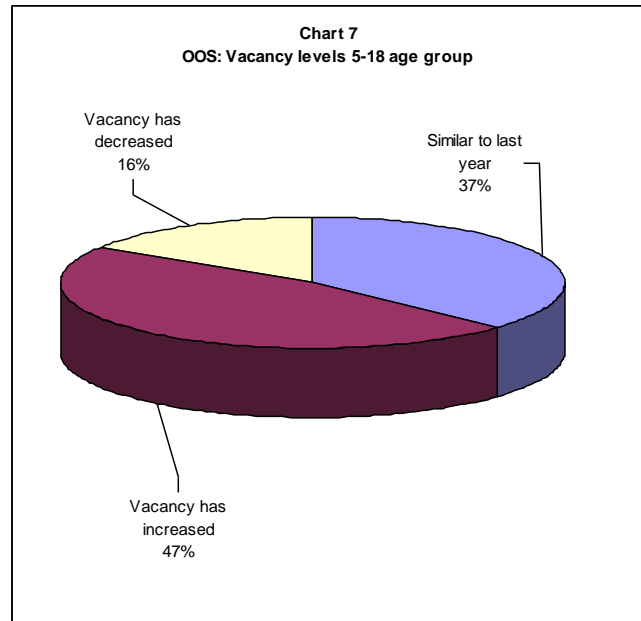
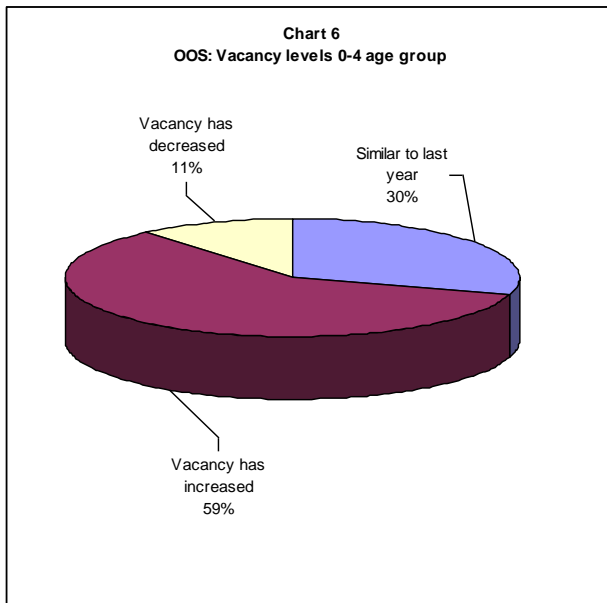
UK inflation rate 2010: 3.3%, 2011: 4.4%, 2012: 3.4%* (ONS)

Analysis based on hours of childcare that are charged. Data does not include free childcare.

2.3 – OOS vacancy levels in Lambeth

Chart 6 and 7 provides a breakdown of responses by out of school (OOS) providers on their vacancy levels by age groups. The results below are from providers who said they provided – Breakfast, after-school clubs or holiday playschemes. The age group breakdown is 0 to 4 and 5 to 18 years old.

Providers who provide services for children over 8 years old do not have to be registered with OFSTED. Data for OOS providers has been based on an Audit carried out in 2010.



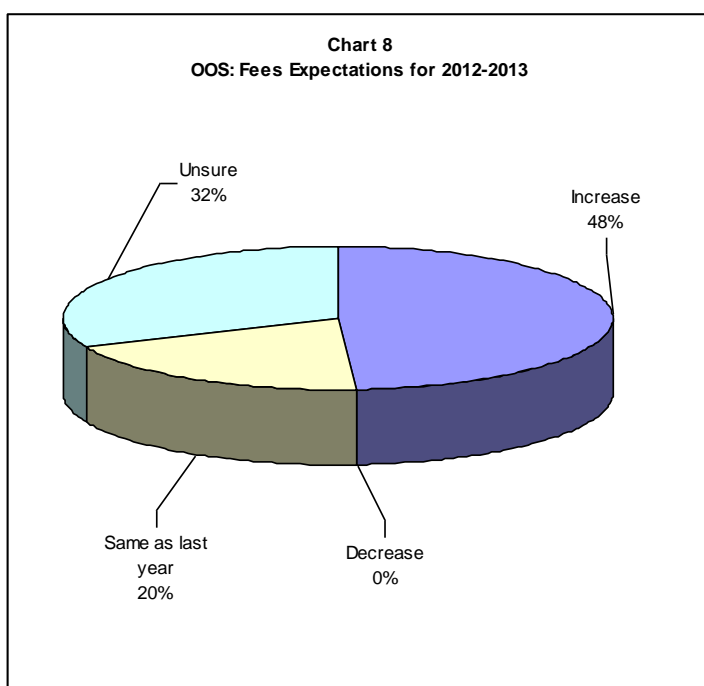
Comments:

The data from the survey conducted in early 2012 cannot be broken into wards. Vacancy levels can change rapidly and the data collected is to provide a snapshot over the last 2 years (2010-2012).

Vacancy levels have increased for both age groups; 59% for 0 to 4, 47% for children aged 5 to 18. OOS providers have experienced higher levels of vacancy of places compared to PVI providers overall.

2.4 – OOS childcare fees levels in Lambeth

The CSA 2011 Report provides a breakdown of average fees (per hour) charged by different types of providers in Lambeth. We asked OOS providers to tell us about their expectation for childcare fees in the coming year and chart 8 shows their responses.



Comments:

Chart 8 shows that majority of OOS providers (48%) expect fees to increase by an average of 6% in the coming year (2012-2013). 20% expect fees to remain the same as the year before and 32% of the providers were still unsure of any fee changes.

The CSA 2011 Report reported average fees (per hour) for OOS at £2.67. This calculation excludes holiday playscheme. Please refer to the **CSA 2011** full report to see ward by ward fees analysis.

Holiday playscheme fees vary enormously from £1 to £100 or more.

UK inflation rate 2010: 3.3%, 2011: 4.4%, 2012: 3.4%* (ONS)

Analysis based on hours of childcare that are charged. Data does not include free childcare.

2.5 – PVI - Net capacity change

We have seen seven new PVI providers establish their childcare businesses in Lambeth in the last year. The same period has also seen seven existing PVI providers permanently close their childcare businesses. Table 8 shows a breakdown by ward where new or close settings are in Lambeth. This table does not take into account any temporary closures that may be in place.

Overall, in Lambeth there has been no net change in the number of places available for childcare. The factors that affect childcare demand are complex but based on vacancy rates we are able to estimate the overall impact on demand. See Table 8.

The net capacity change does not take into account ‘Childminders’. There are just over 300 childminders in Lambeth who are able to provide additional capacity of places and absorb any demand from a closure of a PVI setting.

Table 8: Closed/New settings

Ward	Closed/New (since January 2010)	Impact on places
Bishop’s	0	-
Brixton Hill	-1	Places can be absorbed, new setting within a mile
Clapham Common	+1	-
Clapham Town	-2/+2	No change
Coldharbour	+1	-
Ferndale	0	-
Gipsy Hill	0	-
Herne Hill	0	-
Knight’s Hill	-1/+1	No change
Larkhall	+1	-
Oval	-1	Places can be absorbed, with existing capacity or childminder network
Prince’s	0	-
St Leonard’s	-1/+1	No change
Stockwell	0	-
Streatham Hill	+1	-
Streatham South	0	-
Streatham Wells	-1	Places can be absorbed, new setting within a mile
Thronton	0	-
Thurlow Park	0	-
Tulse Hill	0	-
Vassall	0	-
LAMBETH	-7/+7	No change

3.0 – Current issues

Department for Education (DfE) Statutory guidance consultations'

In September 2012, the DfE launched a consultation on the duties placed on local authorities under Section 6, 7 and 11 of the Childcare Act 2006.

Section 11 places a duty on English local authorities to assess childcare provision. Regulations made under section 11 set out how the assessment must be prepared.

The result of the consultation is set to be published around April 2012 and this may have an effect on the way the Childcare Sufficiency Assessment is produced going forward.

Childcare Sufficiency Assessment Action Plan

The CSA Action Plan is continually being updated. To view the latest update, please check out:
www.lambeth.gov.uk/CSA

End.