

NOTICE OF MEETING

Meeting	Executive Lead Member for Children's Services and Young People Decision Day
Date and Time	Wednesday, 20th November, 2019 at 2.00 pm
Place	Chute Room - HCC
Enquiries to	members.services@hants.gov.uk

John Coughlan CBE
Chief Executive
The Castle, Winchester SO23 8UJ

FILMING AND BROADCAST NOTIFICATION

This meeting may be recorded and broadcast live on the County Council's website. The meeting may also be recorded and broadcast by the press and members of the public – please see the Filming Protocol available on the County Council's website.

AGENDA

1. **CHILDCARE SUFFICIENCY ASSESSMENT** (Pages 3 - 70)

To receive a report of the Director of Children's Services providing an update on how the Local Authority complies with its statutory duty to secure sufficient childcare to meet parental need, in accordance with the Early Education and Childcare Statutory Guidance for Local Authorities (June 2018).

ABOUT THIS AGENDA:

On request, this agenda can be provided in alternative versions (such as large print, Braille or audio) and in alternative languages.

ABOUT THIS MEETING:

The press and public are welcome to attend the public sessions of the meeting. If you have any particular requirements, for example if you require wheelchair access, please contact members.services@hants.gov.uk for assistance.

County Councillors attending as appointed members of this Committee or by virtue of Standing Order 18.5; or with the concurrence of the Chairman in connection with their duties as members of the Council or as a local County Councillor qualify for travelling expenses.

HAMPSHIRE COUNTY COUNCIL

Decision Report

Decision Maker	Executive Lead Member for Children's Services and Young People
Date:	20 November 2019
Title:	Childcare Sufficiency Assessment
Report From:	Director of Children's Services

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Purpose of this Report

1. The purpose of this report is to provide an update to the Executive Lead Member for Children's Services and Young People on how the Local Authority complies with its statutory duty to secure sufficient childcare to meet parental need, in accordance with the Early Education and Childcare Statutory Guidance for Local Authorities (June 2018).
2. The full Childcare Sufficiency Assessment (CSA) is provided as Appendix 1 to this report. This report summarises the key findings and identifies actions to be taken to maintain and improve childcare sufficiency across Hampshire.

Recommendation(s)

3. It is recommended that the Executive Lead Member for Children's Services and Young People note the content of the Childcare Sufficiency Assessment.

Executive Summary

4. Statutory guidance requires that the council is able to secure sufficient childcare for working parents and to undertake a sufficiency assessment to be brought to executive members on an annual basis.
5. The detailed CSA in Appendix 1 provides an overview of Hampshire as at 2019. It provides a status known at that time and provides an action plan that looks forward to the 2020 year and beyond.

6. The early years and childcare sector for under fives continues to offer a good variety of childcare with 95% of provision receiving Good or Outstanding judgements from OFSTED.
7. The county continues to have 98% of children who are three and four year old access funded early years free entitlements and the county is broadly in line with the national picture. Overall take up for funded vulnerable two year olds is just above national averages.
8. The Extended Entitlement (30 hours) childcare has proved very attractive to working families in Hampshire is moving towards 12000 children accessing in 2019. Of those who also received SEND additional funding for early years education, 50% took up extended entitlement. Just under 7000 children entered primary school in 2019 who had previously taken up the extended entitlement and it is likely there will be an increased demand for out of school and holiday childcare as a result.
9. The early years and childcare sector continue to work with the county in offering flexible childcare. However, the market continues to cite issues with financial sustainability due to increased business rates; employers pension costs contributions; increases in national minimum/living wage; and the early years funding rate not receiving inflationary increases for the past six years.
10. The child population is anticipated to grow by 2025 with many new homes being built in Hampshire. The majority of the large developments have plans for early years provision. The smaller housing developments offer different challenge and need careful planning alongside adjacent or other provision in the local areas.
11. The action plan outlines key areas for focus for the period up to 2021.

Contextual Information

12. The Childcare Act 2006 requires local authorities to improve outcomes for all young children, reduce inequalities and ensure there is sufficient, high quality Early Years Education and childcare to meet forecast demand.
13. Section 6 of the Childcare Act 2006 placed a duty on local authorities to secure sufficient childcare, so far as reasonably practicable, for working parents. The Childcare Act 2016 further refined this duty with implementation of 30 hours childcare. The duty was also set out at regulation 33 of the Childcare (early years provision free of charge) (extended entitlement) regulation 2016.

14. The Early Education and Childcare statutory guidance for Local Authorities (June 2018) outlines the requirement to report annually to Council Members on how they are meeting their duty to secure sufficient childcare, and to make this report available and accessible to parents.
15. Hampshire County Council publishes updated childcare sufficiency reports Council website for each of the 11 boroughs and districts and updates elected members through briefings.
16. The detailed CSA in Appendix 1 provides an overview of Hampshire as at 2019. It provides a status known at that time and provides an action plan that looks forward to the 2020 year and beyond.

Key Findings

17. **The mix, quality and availability of different types of provision, including children with special educational needs:**
 - Hampshire's childcare market is predominantly provided from with the Private, Independent and Voluntary childcare sector with growing trend in maintained school direct delivery.
 - Hampshire continues to represent 3% of the All England childcare market.
 - The early years childcare market continues to offer variety of weeks of delivery and 75% deliver beyond school term time.
 - The childcare market supports children with SEND with 7.5% supported directly by the council's inclusion team.
 - Provision for out of school is an area of potential growth.
 - Good and outstanding judgements for Hampshire childcare provisions is at 95% compared to All England levels at 96%.
18. **Early years entitlement including free childcare entitlement for 2, 3 and 4 year olds, both universal and extended (30 hours):**
 - Trends in take up of funded 2s has declined to 68% but is above All England trends.
 - Three and four year old take up remains high and take up hours continue to increase.
 - Extended entitlement (30 hours) has grown quickly with over 11,500 children eligible children claiming.
19. **Current issues affecting the childcare market and the capacity of the market to meet population growth trends:**
 - Continued concern from the market of financial concern with the sector experiencing, increased business rates; increased percentage of employers contributions for pensions; minimum

and living wage increases; pay and condition competition from other sectors such as retail and schools.

- Difficulty in recruiting qualified staff to the childcare workforce.
- No inflation or increases in early years education hourly rates.

Under 5 Childcare

20. Whilst Hampshire providers have reduced by 3% the number of places has significantly increased by 15%. The population of nought to four year olds for the same period increased by 5%.
21. Data collected in Spring 2019 outlined that all age groups of under fives did access some level of early years provision: 18% of one year olds and under; 70% of two year olds (which includes 22% of two year olds that receive early years funding). Nearly all three year olds access provision. Most children aged four years old enter school in September, therefore the numbers reflected in the Spring data at 50% is expected.
22. Take up of early years funded entitlement for all childcare offers continues to do well, specifically, early years education for funded two year olds has continued to be better than national take up although both nationally and in Hampshire take up has reduced.
23. The three and four year old entitlement also has a high take up with 98% and this is above the national position.
24. The 30 hours scheme for working parents with eligible three and four year olds launched in September 2017. The actual take up of the extended entitlement place (30 hours) in summer 2019 has reached 11,200 children. Hampshire is in the top 3 of all local authorities in the number of children supported by this offer. Summer also saw nearly 50% of SEND children access this offer.

Out of School

25. The 30 hours early years offer is likely to impact on the level of demand for Out of School childcare. It is estimated that in the region of 42% of Pupil Admission Numbers in September 2020 for the primary phase will enter school previously having received 30 hours childcare at their early years provider.
26. There is in the region of 5,000 places in Hampshire's out of school childcare. There is limited information regarding take up and the full market offer.

27. A temporary appointment of an out of schools childcare development business officer will be recruited to support a more detailed assessment of supply and demand for this type of childcare.

Housing Developments

28. The Childcare Development team works closely with the School Place Planning team to consider early years and childcare places alongside any required expansion/development of schools. Major housing developments are likely to require 1700 places for two, three and four year old children. Plans are being formed or are in place for developers to support the delivery of early years places.
29. There are also a substantial number of mid to small housing growth developments which can impact local areas where there is not a requirement for developer contribution or consideration of early years. The Childcare Development team respond to individual planning applications to consider impact on childcare sufficiency needs on a case by case basis.
30. It is the smaller developments that are of challenge, especially when there are a cluster of schemes. The estimated numbers of children at an individual site level can appear low, but grouped together with neighbouring developments, puts pressure on early years places in the locality.
31. The childcare development team work with local providers and keep them informed of the changes in the population and potential demand. This supports the market to take up opportunities as they present.

Issues for the Childcare Market

32. Anecdotally and covered in the national press are concerns raised about childcare workforce recruitment. Hampshire has seen a 7% reduction in the number of people working to deliver early years foundation stage since 2014. As part of the early years census, we asked providers to indicate any concerns regarding recruitment and retention of the childcare workforce and the snap shot taken at that time suggested a majority of providers had little concern. However, in Summer 2019 providers had opportunity to inform on any aspects of concern regarding their business and many cited cost pressures in recruiting and retaining qualified staff.
33. Providers also informed of the continued costs pressure faced with regards to business rate increases; employers contribution to pensions; national living wage increased and the erosion of salary differential; inflation costs that are not supported by an early years hourly rate that has been cash limited for a number of years.

34. The introduction of the Extended Entitlement continues to change the income streams for early years and childcare market. Some providers are finding the ability to meet costs with the change in income through more hours being provided by the early years education funding a challenge.

Performance

35. Key sufficiency measures are reported to Childrens Services Management Team and monitored by Services for Young Children service plan as follows:
- Hampshire's take up of early years entitlement for eligible funded two represents 80% of the proxy indicator of possible two year olds informed to the county from the Department for Work and Pensions.
 - Hampshire's take up of universal entitlement¹ of funded three year olds to be 98% of population.
 - The average hours claimed for children aged three achieves 14.15 average hours per week.
 - The average hours claimed for children aged three who stretch their hours across more than 38 weeks per year (stretched offer²) achieves 10.55 average hours per week.
 - The total numbers of three and four year olds accessing early years education is not less than 95% of population
 - Of the codes issued to parents meeting the eligibility criteria for extended entitlement (30 hours) 95% of children access their place.
 - Providers reaching good or outstanding Ofsted Judgements is 2% higher than national position.
 - Of the families that contact SfYC to be supported to find childcare solution 99% of families will have found appropriate childcare solution.

Finance

36. Childcare is supported by parental fees and through Early Years Education funded hours for eligible two, three and four year olds. The early years education funding is provided from the Early Years Block of the DfE Dedicated Schools Grant. It is governed by the Early Years National Funding Formula. The type of organisation and childcare offer will determine the balance of the parental fees to early years funding.

¹ Universal Entitlement is funded universal early years entitlement which is 15 hours per week for 38 weeks a year to a maximum of 570 hours per child's eligible birthday year.

² Stretched offer is funded universal entitlement that is stretched across more than 38 weeks per year, eg 11 hours per week across 52 weeks.

37. Hampshire's Schools Forum is the accountable body for confirming Early Years Education funding rates and receives reports on the funding changes and subsequent consultations.
38. A review and provider consultation on the Early Years National Funding rate for Hampshire concluded in September 2019, and it is anticipated that the early years funding formula will remain the same as it is for 2019/20.
39. The government has announced further funding for the early years education however full details of this is yet to be provided. It is not known how this may impact on funds for providers and whether it will further support the local maintained nursery schools.

Consultation and Equalities

40. Consultation with providers regarding early years education took place during summer 2019. There is no requirement to consult the childcare sufficiency assessment. The assessment will be published on the Council's website and will feature in briefings with childcare providers throughout the coming year.
41. The childcare sufficiency assessment has identified a need for growth across early years education places and out of school childcare due to population change and demand changes for certain types of childcare.
42. Universal early years is available to all three and four year olds resident in England. There is no statutory requirement for parents to take up provision and choice remains. The statutory Early Years Foundation Stage requires all providers to be inclusive. The Council monitors take up of ethnic groups through parental declaration at child's access to provision.
43. The continued monitoring of the take up and implementation of action plans to stimulate childcare places growth in areas of help to mitigate risk in the sufficiency of places not being available for parents.
44. An Equalities Impact Assessment is not required at this time as there is no change to policy and the report is an assessment of business as usual..

Action Plan

45. The key areas for detailed scrutiny across all Hampshire Districts is set out for the following categories. This will include establishing a monitoring process. These actions will cover the period 2019 to 2021.

- Childcare for under Twos and Two Year olds – Capacity of the market and assessment against population.
- Out of School childcare– Capacity of the market and assessment against trends in 30 hours take up.
- Rural Childcare: Review Capacity of the market and assessment of rural sustainability and assessment against population.
- Childcare to support new Housing Developments: Review all known housing developments and phasing to determine the future childcare needs.

Provider sustainability:

- Continued development and implementation of a set of early indicators to support Development Officers to identify risks to childcare sufficiency in the childcare market.
- Continued review of the costs pressures of childcare providers to inform strategies to strengthen the provider base where possible.

Early Years Education:

- Continued monitor of 2 year old funding to ensure access, and taking action to maintain access if appropriate.
- Continued monitor of 30 hours childcare to ensure access and taking action to maintain access if appropriate.
- Continued monitor to ensure take up of entitlements for disadvantage children: Early Years Pupil Premium; Disability Access Fund; SEND, and taking action to maintain access if appropriate.

Out of School Childcare (OSC):

- Recruitment of (temporary) dedicated project officer to assess OSC/Holiday scheme provision and develop strategy.
- Development of data set to share with schools on 30 hours take up of new Year R in-take to support schools planning for new intake and potential demand for out of school provision.
- Targeted data collection from out of school clubs and schools to inform OSC place planning.

Childcare Workforce:

- Continued promotion of childcare as a career choice at job fairs and liaison with Job Centre Plus.
- Continued development with Further Education colleges, Housing Associations, and Job Centre Plus of the roll out of “Sector Based work academy- childcare” programme to support new entrants to childcare workforce
- Continued monitor through EYNFF survey of the numbers of staff and qualification in the sector.

Conclusions

46. Hampshire continues to have a high quality and responsive childcare market. There is a good mix of provision including childminders. The market continues to support funded two year olds and has responded well to introducing the extended entitlement for working parents (30 hours). The market has sustained its capacity for three and four year olds with 97% of all three and four year olds accessing provision.
47. The growth in the numbers of three and four year olds accessing extended entitlement (30 hours) is expected to impact on the requirement for confirmed out of school childcare. The is currently limited data around the size of the out of school childcare market and assessment is difficult to be made.
48. Housing developments and subsequent population growth will require careful market management over the course of the next 5 years. Areas of low child population, e.g. rural areas will need to be watched carefully to ensure parents are supported to access provision to meet their needs.
49. Better data recording of SEND children has shown there to be a good offer for children and the numbers of children accessing early years education, including extended entitlement (30 hours) has grown and the childcare market has developed its local SEND offer to meet these needs.
50. The sector continues to cite financial difficulties and workforce recruitment and retention of qualified staff. Having sufficient and appropriately qualified staff will be key to ensuring stability in the childcare market and its ability to augment and deliver the anticipated growth.

REQUIRED CORPORATE AND LEGAL INFORMATION:

Links to the Strategic Plan

Hampshire maintains strong and sustainable economic growth and prosperity:	yes
People in Hampshire live safe, healthy and independent lives:	no
People in Hampshire enjoy a rich and diverse environment:	no
People in Hampshire enjoy being part of strong, inclusive communities:	no

Other Significant Links

Links to previous Member decisions:	
<u>Title</u>	<u>Date</u>
Direct links to specific legislation or Government Directives	
<u>Title</u> Childcare Act 2006: Section 6, Section 7 (as substituted by section 1 of the Education Act 2011) Section 7A (as inserted by the Children and Families Act 2014) Section 9A (as inserted by the Children and Families Act 2014) Childcare Act 2016 Section 1	<u>Date</u> 2006 and 2016

Section 100 D - Local Government Act 1972 - background documents

The following documents discuss facts or matters on which this report, or an important part of it, is based and have been relied upon to a material extent in the preparation of this report. (NB: the list excludes published works and any documents which disclose exempt or confidential information as defined in the Act.)

Document

Location

Childcare Sufficiency Assessment 2019/20 Appendix 1 to this report.	To be published on council's website after meeting.
The Hampshire Labour Market Bulletin August 2019 produced by the Economic and Business Intelligence Service Hampshire County Council	https://www.hants.gov.uk/business/ebs/reports
Developers guide:	https://www.hants.gov.uk/educationandlearning/schoolplacesplan
DfE Experimental Statistics	https://www.gov.uk/government/statistics/30-hours-free-childcare-summer-term-2019
Source: Office for National Statistics (Mid 2018 release June 2019):	https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/analysisofpopulationestimatestool

EQUALITIES IMPACT ASSESSMENT:

1. Equality Duty

The County Council has a duty under Section 149 of the Equality Act 2010 ('the Act') to have due regard in the exercise of its functions to the need to:

- Eliminate discrimination, harassment and victimisation and any other conduct prohibited by or under the Act with regard to the protected characteristics as set out in section 4 of the Act (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation);
- Advance equality of opportunity between persons who share a relevant protected characteristic within section 149(7) of the Act (age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation) and those who do not share it;
- Foster good relations between persons who share a relevant protected characteristic within section 149(7) of the Act (see above) and persons who do not share it.

Due regard in this context involves having due regard in particular to:

- The need to remove or minimise disadvantages suffered by persons sharing a relevant protected characteristic that are connected to that characteristic;
- Take steps to meet the needs of persons sharing a relevant protected characteristic that are different from the needs of persons who do not share it;
- Encourage persons sharing a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low.

2. Equalities Impact Assessment:

It has been agreed with Childrens Services Equalities Impact Assessment officer that an EIA is not required at this time as there is no change to policy and the report is an assessment of business as usual.



Hampshire Childcare Sufficiency Assessment 2019

The Hampshire Childcare Sufficiency Assessment 2019

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1. Introduction

This assessment provides an overview of childcare sufficiency in Hampshire. It looks at the current level of supply and demand of childcare, and particularly focuses upon the Early Years Education and the offer of 30 hours childcare and impact towards out of school childcare. Hampshire County Council has published previous CSA reports for each of the 11 boroughs and districts in the Hampshire local authority area which we subsequently published on the Council's website. This assessment also provides some comparison of the childcare market from the first Childcare Sufficiency Assessment (CSA) published in 2008 providing a 10 year review.

2. Background

The Childcare Act of 2006 Section 6 places a duty on English local authorities to secure sufficient childcare for working parents. Section 7 also places a duty on local authorities to secure early years provision for young children in its area, free of charge and in accordance with the Local Authority (Duty to Secure Early Years Provision Free of Charge) Regulations 2014. The local authority needs to secure early years education places offering 570 hours a year, over no fewer than 38 weeks of the year, for every three and four year old child in their area from the term after their third birthday until the child reaches compulsory school age, known as "universal entitlement". There is also a requirement to secure Early Years Education provision for eligible two year old children, from the term after their second birthday.

In September 2017 the Childcare Act 2016 Section 2 placed a duty on the local authority to secure free childcare for qualifying children as set out at regulation 33 of Childcare (Early Provision Free of Charge) Extended Entitlement Regulations 2016. This requires childcare places to be made available to working parents who meet eligibility criteria to secure for their three and/or four year old child/ren up to a further 15 additional hours known as "extended entitlement" free on top of the "universal entitlement" 15 free hours. Early Years Education and childcare provision should be accessible, flexible, inclusive and provided through a range of settings to meet parental demand. Provision is required to meet statutory duties and responsibilities under the reforms in the Children and Families Act 2014 and associated regulations in relation to children in their care and children who may have special educational needs or disabilities (SEND).

Free Early Years Education in Hampshire is delivered through a mixed market of Ofsted registered Early Years Foundation Stage (EYFS) settings which include maintained nursery schools and nursery units of primary schools; private, voluntary and independent (PVI) day nurseries; preschools; and registered childminders. For further details on Early Years and Childcare in Hampshire visit www.hants.gov.uk/childcare

There are a variety of sources of financial support for groups of parents that influence demand for types of childcare. The main sources are:

- Universal and Extended (30 hours) Early Years Education Entitlement
- Funded Entitlement for Two Year olds
- Tax Free Childcare
- Childcare Tax Credit within the Universal Credit/Legacy benefit

3. Methodology

The Hampshire CSA has been based upon a measurement of the supply and demand for childcare using both national statistics and a variety of data collected by the Council and using national statistics.

4. Childcare demand

Demand for childcare is derived by considering the numbers of children being born (Population) in the county and the likely requirement of parent to access a childcare place.

The economic climate of the area will be a significant factor in demand for certain types of childcare.

The Council uses its data and information on the current take patterns against population trends to assist in the planning of future childcare need.

Population

Hampshire Population Forecast 0 -15 year olds.

Graph 1 shows that Hampshire Small Area Population Forecast (SAPF) suggests an overall population of 0-15 year olds in 2019, totalling 240,956 and this figure is expected to increase by 17,118 (7%) to 258,074 in 2025.

Graph 1

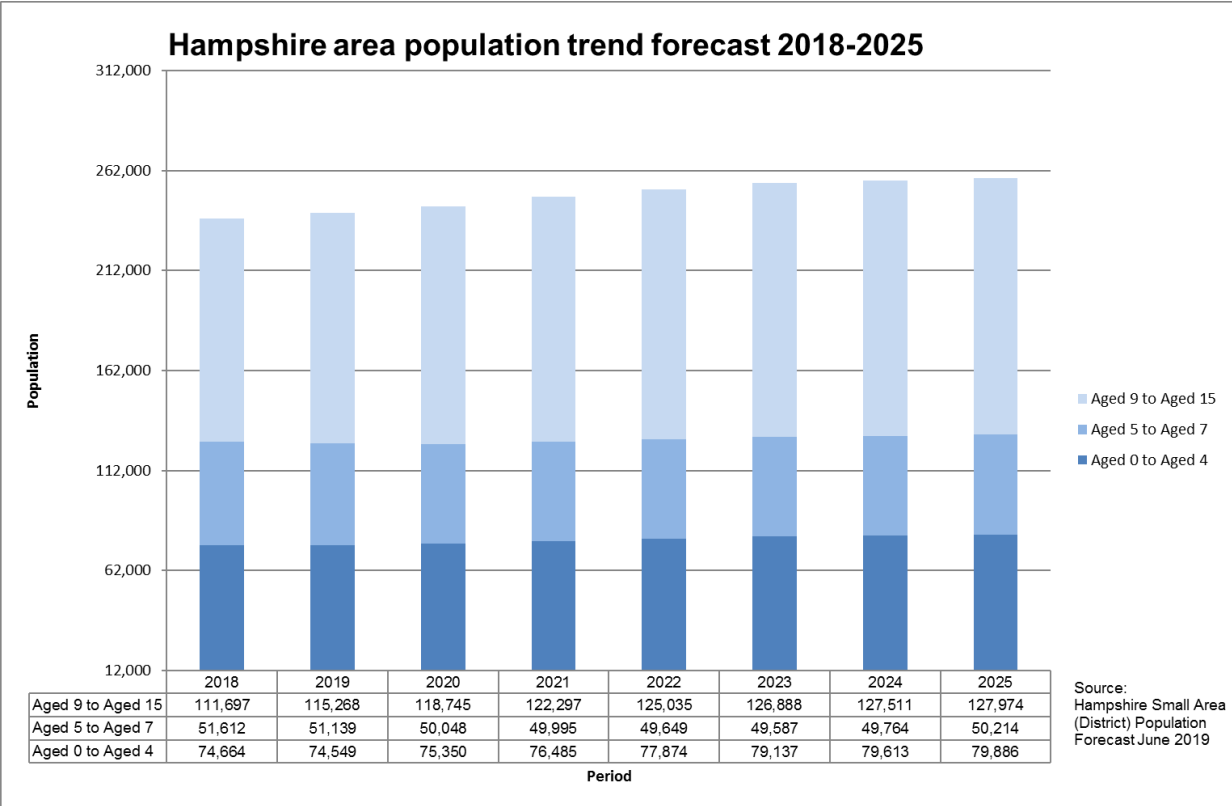
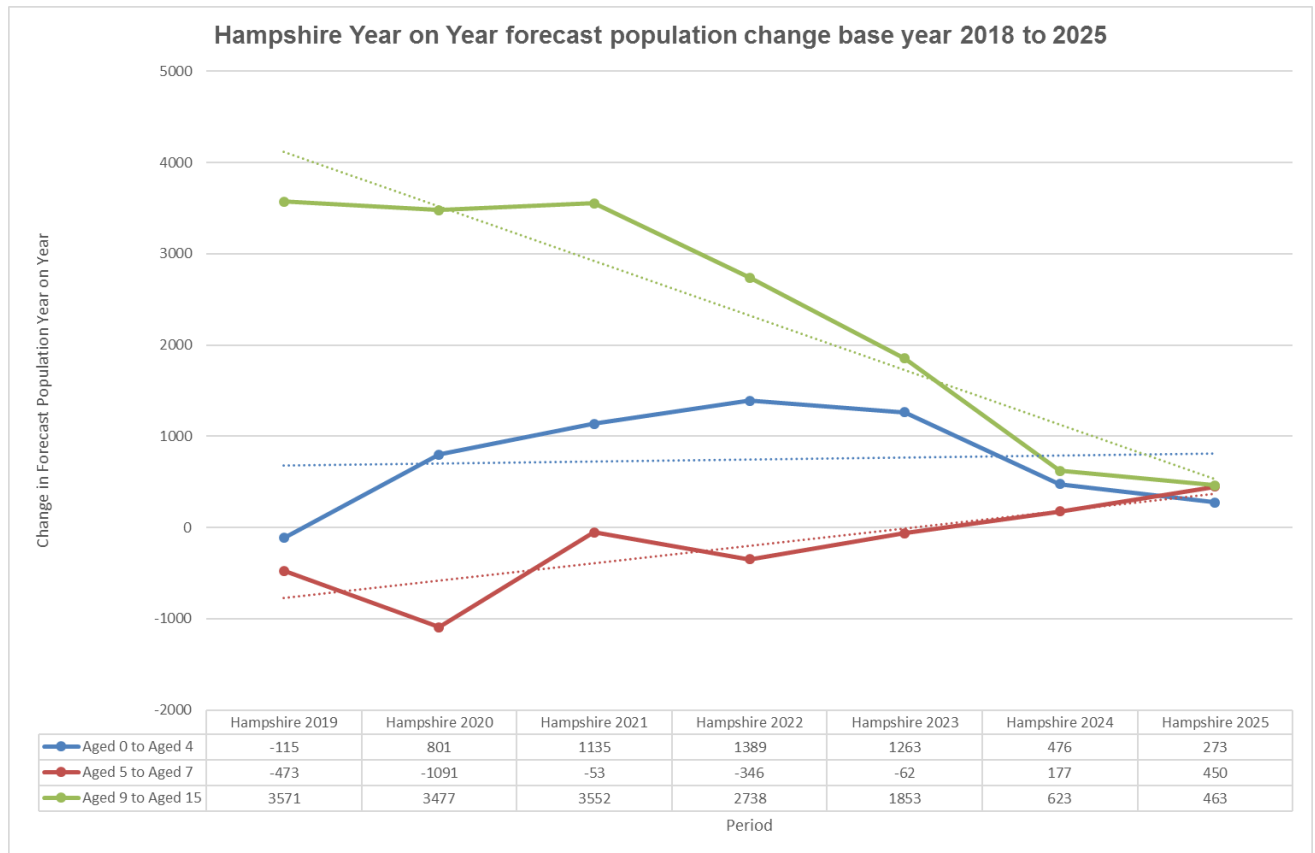


Figure 1 shows the breakdown of the change in population by each age group between 2018 and 2025.

Figure 1



Population changes for under 5 year olds

Table 1 provides a more detailed breakdown of the under fives age group and the anticipated population changes from 2019 to 2025. Overall this population is forecast to grow by 7% by 2025. Breaking this down across the individual age groups shows there is some variation of growth and reduction in each age group across this period.

Table 1

Hampshire Population Forecast Year on Year trend 0 years to 4 years of age 2018 to 2025																		
Year	Babies <1 (0 years)			1 years to <2 years			2 years to <3 years			3 years to <4 years			4 years to <5 years			Total 0 years to <5		
	Popula tion	0 to < 1 year old change	% Chang e	Popula tion	<0 to 2 years change	% Chang e	Popula tion	>2 to 3 years change	% Chang e	Popult ation	>3 to < 4 years change	% Chang e	Popula tion	>4 to 5 years change	% Chang e	Popula tion	Total under 5 change	% Chang e
2018	13599			14322			15176			15261			16306			74664		
2019	14483	884	6.50%	14082	-240	-1.68%	14784	-392	-2.58%	15585	324	2.12%	15615	-691	-4.24%	74549	-115	-0.15%
2020	14708	225	1.55%	14886	804	5.71%	14562	-222	-1.50%	15258	-327	-2.10%	15936	321	2.06%	75350	801	1.07%
2021	14947	239	1.62%	15216	330	2.22%	15410	848	5.82%	15137	-121	-0.79%	15775	-161	-1.01%	76485	1135	1.51%
2022	15174	227	1.52%	15440	224	1.47%	15715	305	1.98%	15915	778	5.14%	15630	-145	-0.92%	77874	1389	1.82%
2023	15299	125	0.82%	15576	136	0.88%	15857	142	0.90%	16130	215	1.35%	16275	645	4.13%	79137	1263	1.62%
2024	15356	57	0.37%	15656	80	0.51%	15943	86	0.54%	16221	91	0.56%	16437	162	1.00%	79613	476	0.60%
2025	15384	28	0.18%	15697	41	0.26%	16006	63	0.40%	16288	67	0.41%	16511	74	0.45%	79886	273	0.34%
Total Chang e 2018 to 2025	1785	1785	13.13%	1375	1375	9.60%	830	830	5.47%	1027	1027	6.73%	205	205	1.26%	5222	5222	7.00%

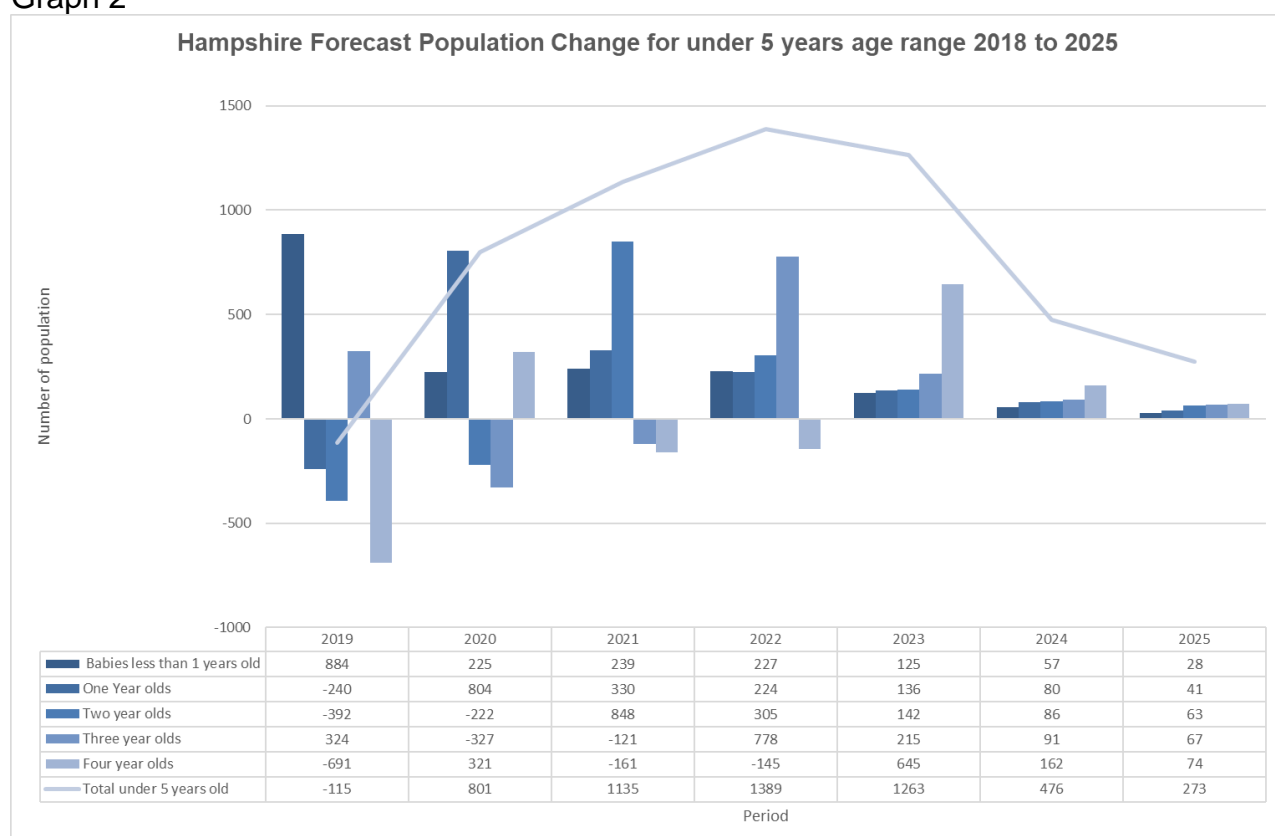
There is a 23% forecast rise in the number of under two year olds by 2025. The main growth is seen between 2020 to 2023. By 2020, there is a 4% reduction in this age group and then a 5% growth in 2021 with growth continuing at a lesser scale to 2025.

The three year old age group is forecast to grow by 7% by 2025. The small growth of 2% in 2019 is balanced by a 2% forecast reduction in this age group in 2020 and a further reduction indicated of 1% in 2021. There a 5% growth anticipated in 2022, continuing to a lesser extent through to 2025.

A slightly different pattern is seen for the four year old population where the 2019 year enters with a reduction of 4% from 2018 and a growth of 2% is forecast for 2020. By 2022 the position changes with a 2% reduction and a 4% growth at 2023 moving forwards with continue growth at lesser extent to 2025.

Graph 2 provides a more detailed view of the populations for the under fives against the base year of 2018 and informs that the areas of most growth is seen in the periods 2020 to 2023.

Graph 2



Population changes 5 - under 8s

The population of 5 years to 8 years olds and under is anticipated to reduce by 3% in the period 2018 to 2025. This is the age group of children that would be in school and could require out of school childcare.

Table 2

Hampshire Population Forecast trend 5 years to 8 year olds 2018 to 2025														
Year	5 year olds			6 year olds			7 year olds			8 year olds			Total 5 years to 8 years	
	Population	5 years to < 6 years change	% Change	Population	6 years to < 7 years change	% Change	Population	7 years to < 8 years change	% Change	Population	8 years to < 9 years change	% Change	Population	Total 5 years to < 8 Years change
2018	16556			17414			17642			34093			51612	
2019	16672	116	0.7%	16851	-563	-3.2%	17616	-26	-0.1%	35293	1200	3.52%	51139	-473
2020	15969	-703	-4.2%	16951	100	0.6%	17128	-488	-2.8%	35953	660	1.87%	50048	-1091
2021	16352	383	2.4%	16354	-597	-3.5%	17289	161	0.9%	35707	-246	-0.68%	49995	-53
2022	16210	-142	-0.9%	16725	371	2.3%	16714	-575	-3.3%	35578	-129	-0.36%	49649	-346
2023	16006	-204	-1.3%	16555	-170	-1.0%	17026	312	1.9%	35042	-536	-1.51%	49587	-62
2024	16598	592	3.7%	16317	-238	-1.4%	16849	-177	-1.0%	34714	-328	-0.94%	49764	177
2025	16744	146	0.9%	16877	560	3.4%	16593	-256	-1.5%	34795	81	0.23%	50214	450
Total Change 2018 to 2025	188	188	1.1%	-537	-537	-3.1%	-1049	-1049	-5.9%	702	702	2.06%	-1398	-1398

Hampshire Economy

Employment opportunity can influence parental demand for childcare. Hampshire is an area with higher than the national average employed rates. The Hampshire Labour Market Bulletin August 2019¹ shows that latest Hampshire Economic Area² (HEA) ILO³ has an employment rate of 79.3%, modelled unemployment of 3.5% and economic inactivity at 17.8%. The ILO youth unemployment rate is 10.1%.

The UK employment rate is 76.1% for the three months to July 2019. For a local comparison, the nearest equivalent employment rate for the Hampshire Economic Area is 79.3% for the 12 months to March 2019 and 80.5% for the Hampshire County Council area.

Using the commonly recognised ONS⁴ Monthly unemployed claimant count the HEA saw an increase of 910 claimants to reach 20,530 for August 2019, with the rate up on the month to 1.8%.

¹ The Hampshire Labour Market Bulletin August 2019 produced by the **Economic and Business Intelligence Service** Hampshire County Council <https://www.hants.gov.uk/business/ebis/reports>

² Hampshire Economic Area includes 11 Boroughs and District including Portsmouth and Southampton.

³ ILO is International Labour Organisations March 2019

⁴ ONS is Office of National Statistics

The DWP quarterly benefit claimant count for Hampshire was not updated this month and remains at 69,320 for February 2019 and at 6.0% is marginally lower than the South East (6.1%), and well below the national rate (8.6%).

Hampshire currently remains an area of high employment.

Housing Developments

There are 13 local planning authorities in Hampshire, (including the New Forest and South Downs National Park Authorities.) Each determines their own housing strategy and targets as part of their Local Plan (LP). Each LP contains a Core Strategy which sets out the planning authority's policies and general location for housing and these plans are at various stages of development. The number and rate of build of dwellings on sites, and indeed the location of the sites themselves, are often subject to change presenting further challenges to the task of place planning.

The Childcare Development team works closely with the School Place Planning team to consider early years and childcare places alongside any required expansion/development of schools.

An Early Years Developers guide⁵ has been created and the following table, based on a 0.3 yield of children per household. There are five age groups for early years and childcare (< 1 years; <2 years; <3 years; <4 years; <5 years), therefore the average number for each individual age group is $0.3/5 = 0.06$. This can be considered the "cohort size" and using trends in known early years education take up estimates for funded two, three and four year olds inform potential requirement.

Table 3 shows the level of potential demand for Early Years Education places based on the size of the housing development shown for 2025. It does not provide an assessment for younger aged nursery childcare.

⁵ Developers guide: <https://www.hants.gov.uk/educationandlearning/schoolplacesplan>

Table 3

Hampshire: Total Number of planned dwellings in Each District, 2018 and 2025								
District	2018 Dwellings Planned	2025 Final Dwellings Planned	Number of expected homes with children (0.3 per dwelling)	Number of expected Early Years Funded children (0.3/5)	2 year olds (20% of cohort)	3 year olds (93% of cohort)	4 year olds (32% of cohort)	All EYE Age Groups
Basingstoke	74757	83390	2502	150	30	147	48	225
East Hampshire	52560	58472	1754	105	21	103	34	158
Eastleigh	56502	64336	1930	116	23	113	37	174
Fareham	49911	53131	1594	96	19	94	31	143
Gosport	37687	39676	1190	71	14	70	23	107
Hart	39530	43826	1315	79	16	77	25	118
Havant	55455	59467	1784	107	21	105	34	161
New Forest	81917	86015	2580	155	31	152	50	232
Rushmoor	39644	45183	1355	81	16	80	26	122
Test Valley	54485	60336	1810	109	22	106	35	163
Winchester	51945	58853	1766	106	21	104	34	159
Total All Districts	594,393	652,685	19581	1175	235	1151	376	1762
Source: Dwellings Hampshire Schools Places Planning								
EY Places Developers guide								

Appendix 5 sets out the major development areas and the current known plans/secured provision for early years and childcare. It is important to note that forecasts for early years and childcare for new dwellings will, where appropriate, take account of the local context and opportunity for expansion of any in-situ childcare provision.

Alongside major developments there are a substantial number of mid to small areas of housing growth which can impact local areas where there is not a requirement for developer contribution or consideration of early years. The Childcare Development team respond to individual planning applications to consider impact on childcare sufficiency needs.

The provision of the early years and childcare facilities is recommended to be available at an early stage of any new development to ensure a sufficiency of places. This will require the land being accessible and the statutory utilities being provided early in the development. The County Council emphasises this need when the Local Planning Authorities are considering allocations of land and contributions towards the cost of providing community facilities within any new development.

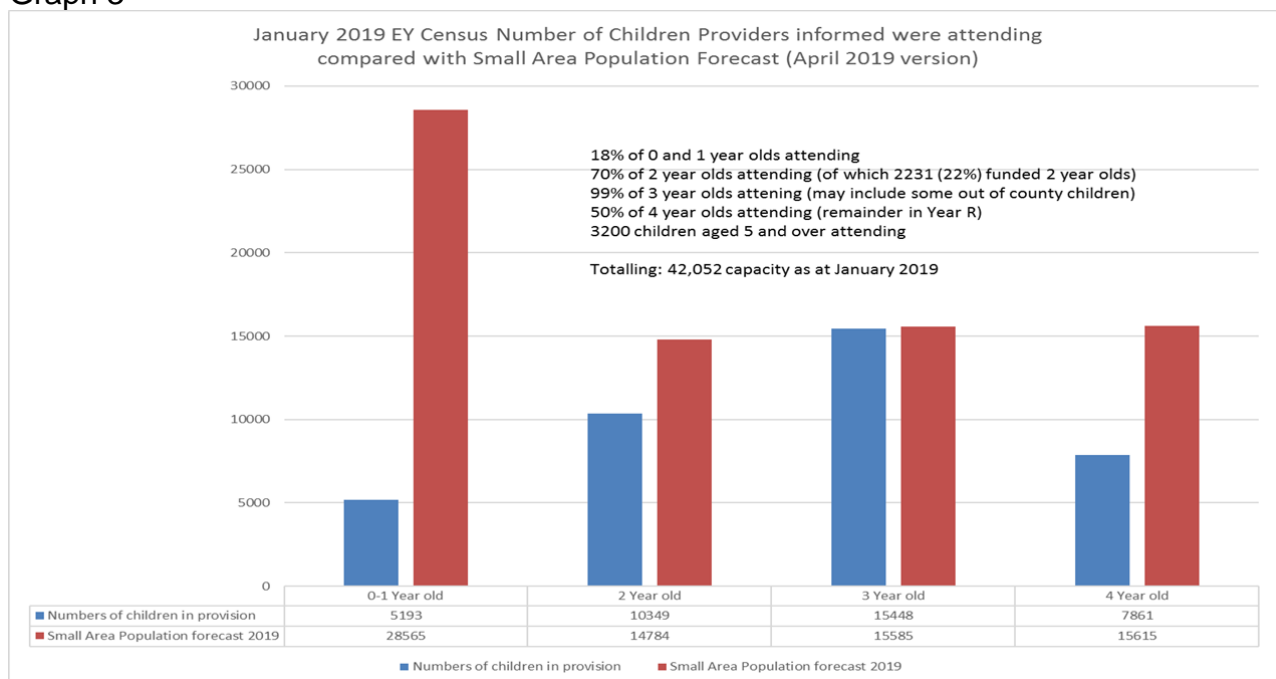
5. What Hampshire knows about childcare take up

Under fives access to provision

Annually the DfE requires all early years approved childcare providers to undertake a census of the type of provision and the children present. This return also provides an indication of how many children under 5 are accessing any type of provision in the headcount week of January.

Graph 3 compares age of children accessing compared to the small area population forecast. This indicates that all age groups will access some provision. In Spring 2019 18% of babies were attending provision and 70% of two year olds (includes 22% of funded twos). Nearly all (99%) of three year olds access provision. The numbers of four year olds accessing childcare provision was 50%, as most will have entered year R in school from September.

Graph 3



Early years education take up

Early Years Education is a significant part of the childcare market and is defined as provision which delivers the Early Years Foundation Stage (EYFS) and attracts Early Years Education (EYE) funding. All three and four year olds plus eligible two year olds are entitled to up to 570 hours per child's eligible birthday year. This equates to 15 hours over minimum of 38 weeks. The 570 hours can be "stretched" over more than 38 weeks.

Hampshire's take up of early years entitlement is strong as shown in table 4 below which outlines the numbers of children claiming against the expected population by age group.

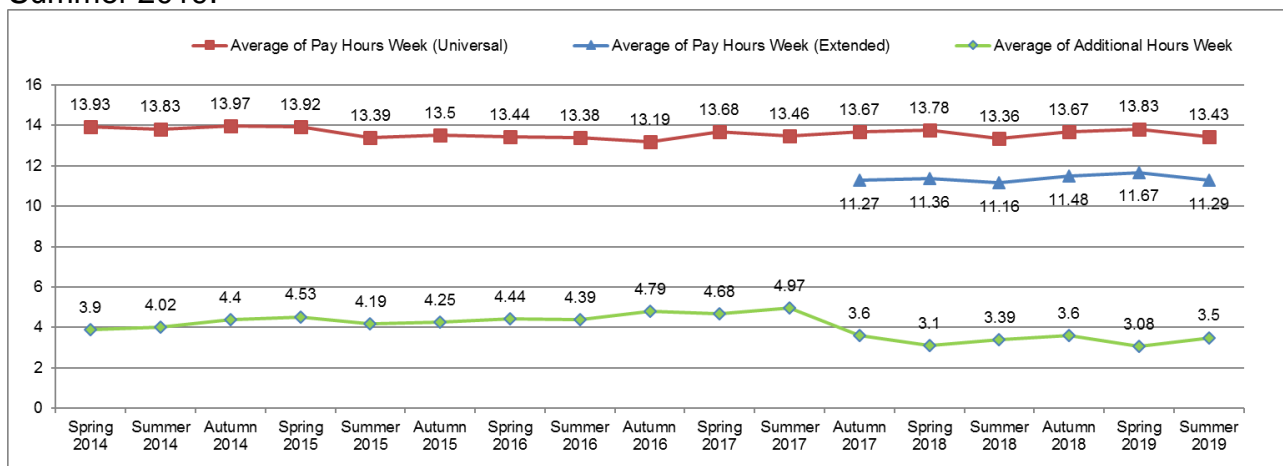
Table 4

Hampshire Early Years Education Entitlement Take Up Spring 2019									
District	2yr old Claims	2yr old SAPF	% 2yr old Take Up	3yr old Claims	3yr old SAPF	% 3yr old Take Up	4yr old Claims	4yr old SAPF	% 4yr old Take Up
Basingstoke and Deane	293	2270	12.91%	2079	2189	94.97%	2050	2279	89.95%
East Hampshire	152	1105	13.76%	996	1092	91.21%	1104	1272	86.79%
Eastleigh	232	1522	15.24%	1491	1589	93.83%	1573	1721	91.40%
Fareham	111	1168	9.50%	1171	1186	98.74%	1126	1232	91.40%
Gosport	254	1006	25.25%	1027	1013	101.38%	1021	1025	99.61%
Hart	84	1057	7.95%	1086	1134	95.77%	1172	1256	93.31%
Havant	388	1443	26.89%	1235	1323	93.35%	1280	1448	88.40%
New Forest	334	1732	19.28%	1676	1727	97.05%	1756	1846	95.12%
Rushmoor	161	1316	12.23%	1159	1385	83.68%	1273	1420	89.65%
Test Valley	204	1365	14.95%	1348	1355	99.48%	1338	1429	93.63%
Winchester	183	1242	14.73%	1242	1346	92.27%	1306	1456	89.70%
Grand Total	2396	15226	15.74%	14510	15339	94.60%	14999	16384	91.55%
SAPF = Hampshire Small Area Population Forecast									
Take Up = Children resident in Hampshire claimed by approved childcare settings or attend school for Year R pupils									

The average hours taken up per week for children aged 2/3 and 4 is outlined in graph 4. The graph also provides an indication of the number of non-funded hours taken.

Graph 4

Hampshire Trend Average Funded Hours and Non-Funded Hours Spring 2014 to Summer 2019.



There was an assumption at the implementation of the extended entitlement that there would be limited scope for providers to attract paid for hours from parents. This information tells us that the market has absorbed the requirement for

extended entitlement and there are still additional hours being provided on top of this which have started to increase.

Extended Early Years Entitlement (30 hours)

In September 2017 the DfE implemented extended 15 hours entitlement to free childcare for working families. This provided eligible families with the opportunity for children to have up to 30 funded hours per week free childcare.

The additional 15 hours entitlement is available to families where both parents are working (or the sole parent is working in a lone parent family), and each parent earns, on average, a weekly minimum equivalent to 16 hours at national minimum wage (NMW) or national living wage (NLW), and less than £100,000 per year.

Working includes employed and self-employed persons. Parents do not necessarily need to actually work 16 hours a week, but their earnings must reflect at least 16 hours of work at NMW or NLW, which is £8.21 per hour (25 year olds +). This includes those parents on zero contract hours who meet the criteria as well as self-employed.

The extended entitlement complemented the government's introduction of Tax Free Childcare where parents can access up to 20% (£2,500) (or £4000) of their childcare costs. These two policy initiatives work together to provide families with different characteristics with appropriate free and/or financial support through HMRC to pay for childcare. The aim of these policies is to allow entry to, or continued employment for families who have children aged three and four and also Tax Free Childcare to support younger and older children's childcare needs.

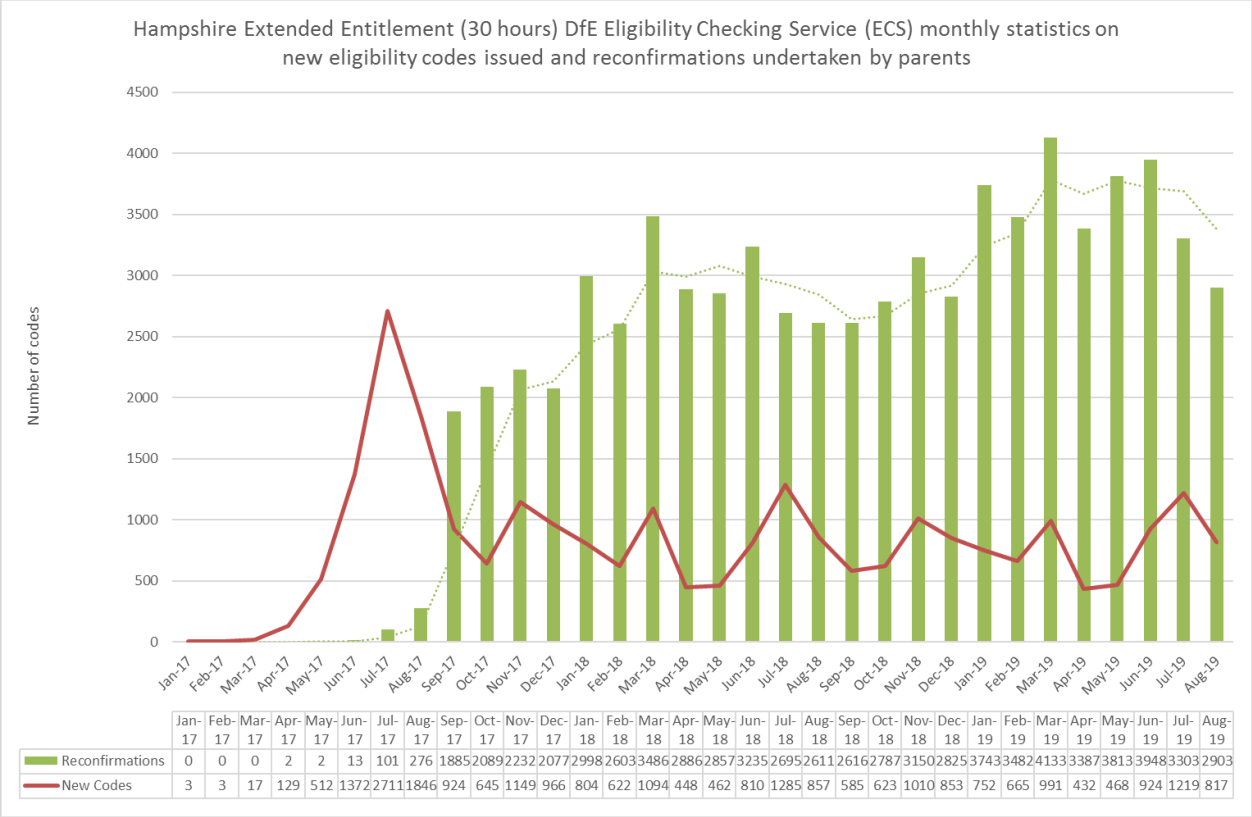
Parents that wish their child to access extended entitlement (30 hours) must get an eligibility code from HMRC and have this verified by their provider before funding periods start. Not all parents who apply and receive eligibility move to the next stage and have it verified by their childcare provider. DfE collects this information and has provided experimental data⁶ which shows the number of codes issued, verified by providers and reconfirmed by parents.

Graph 4 above shows the impact of the introduction of Extended Entitlement in Autumn 2017. The market provided in excess of 11 extended hours per week on top of previous total attendance averages. This demonstrates that the market has increased its capacity.

⁶ DfE Experimental Statistics <https://www.gov.uk/government/statistics/30-hours-free-childcare-summer-term-2019>

Graph 5 shows the first full 18 month trend from implementation to summer 2019 of the actual take up of children and the number of codes issued and reconfirmed by parents.

Graph 5



The 30 hours scheme launched in September 2017 and promotion of the offer started in the summer period. The initial spike reflects parents accessing codes in readiness for the first Autumn claim. All eligibility codes are required to be reconfirmed by parents after a 12 week period. In Hampshire there has been a fairly consistent pattern in the numbers of eligibility codes issued together with an expected increase in the number of reconfirmations. The reduction of codes being reconfirmed in July 2019 and August 2019 reflects the number of children in receipt of the extended offer moving to year R in school. This shows that, in the main, those parents who obtain eligibility continue to meet eligibility requirements. This trend will continue to be monitored closely.

In order to measure the performance of the extended entitlement it is important to know the number of actual claims against eligibility codes issued and validated. The conversion of the eligibility codes validated is shown in Table 5. This is the actual take up of the extended entitlement place (30 hours) for each period. The extended offer for the summer 2019 has reached 11,300 which is 99% of the codes validated by a childcare provider and 94% of the eligibility codes issued. This shows an increasing number of parents gaining eligibility and using these

codes to access a place their child. The original assessment in 2016/17 for extended entitlement suggested in the order of 12000 possible children whose circumstances would meet eligibility criteria and it is interesting to see that by summer 2019 the number of codes issued has reached this initial projection.

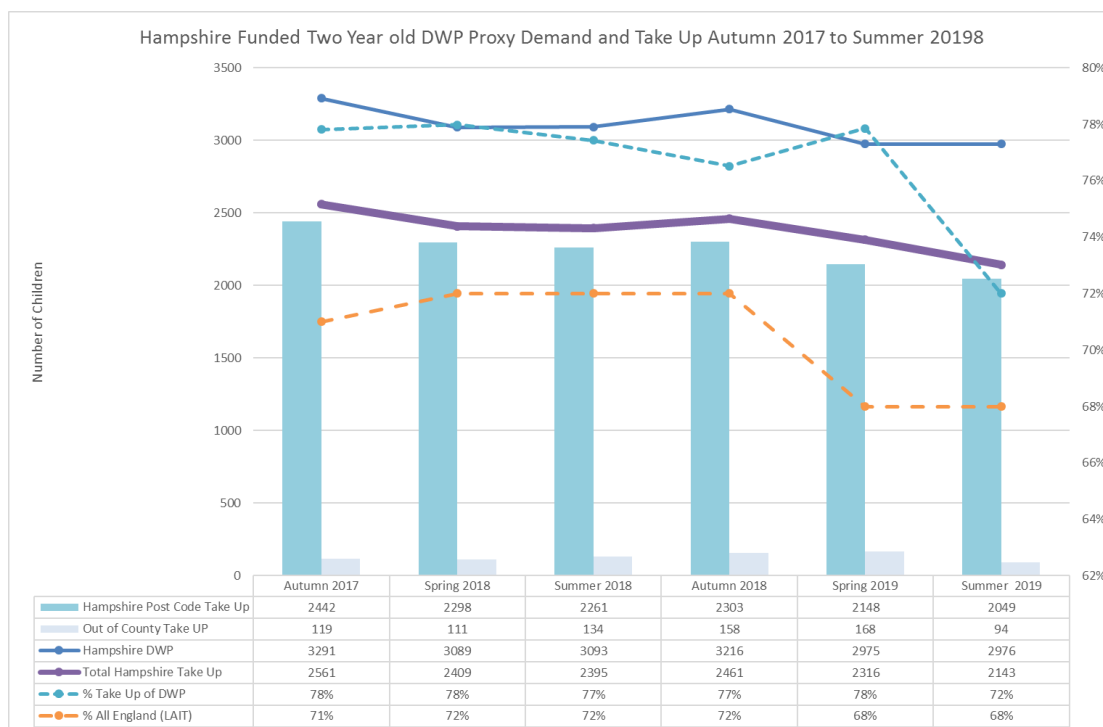
Table 5

DfE Experimental Statistics								
EYE Period	Eligibility codes issued by HMRC valid for the period	Codes validated by providers for claiming in the period	Codes validated % of those issued	Children in a 30 hours place (estimate mid period from LA)	Children in a 30 hours place as a percentage of codes issued (%)	Hampshire Actual take up at end of headcount period	Actual take up as % of codes issued (%)	Actual take up as % of codes validated (%)
autumn 2017	6,379	5,943	93%	5,737	90%	5,808	91%	98%
spring 2018	9,418	8,780	93%	8,311	88%	8,354	89%	95%
summer 2018	11,030	10,440	95%	10,020	91%	10,098	92%	97%
autumn 2018	7,199	6,841	95%	6,487	90%	6,729	93%	98%
spring 2019	10,069	9,578	95%	9,338	93%	9,364	93%	98%
summer 2019	12,027	11,427	95%	10,660	89%	11,278	94%	99%
Data from DfE Experimental Statistics								
Actual Take Up from HCC Extended Entitlement claims - Capita One								

Funded Twos

It is possible to use the DfE Department Work and Pension information that is provided to the council on a termly basis to give an estimate of the demand for funded two year old places. This is known as “DWP”. To access a place parents have to confirm eligibility and receive an eligibility code and then use this to access their place. Graph 6 shows the DWP numbers, percentage take up of DWP and the total number of children accessing over the period Autumn 2017 and Summer 2019. The numbers of the DWP data are on a downwards trend. Hampshire has continued to better the All England take up but the trend for 2019 is suggesting a decline in take up.

Graph 6



6. The supply of childcare in Hampshire

Hampshire's childcare demand population compared to the national position

Hampshire child population of children aged 0 years to 16 years represents just over 2.4% of the overall All England child population for those ages⁷. Since 2008, Hampshire's child population (0-16) has grown by up to 3%. There are 5% more 0-4 year olds in the county compared to 2008. Table 6 provides a detailed breakdown of population changes from 2008, 2016 to date.

⁷ Source: Office for National Statistics (Mid 2018 release June 2019):
<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/analysisofpopulationestimatestool>

Table 6

Area	Population 0 to 16 years			Population 0-14 years			Population 0 to 4 years		
			Hampshire CSA 2019 % of England			Hampshire CSA 2019 % of England			Hampshire CSA 2019 % of England
All England (mid 2018)	11,342,413		2.37%	10,144,712		2.35%	3,346,727		2.22%
CSA Period	Population estimate	Change in CSA periods	% change	Population estimate	Change in CSA periods	% change	Population estimate	Change in CSA periods	% change
Hampshire CSA 2019	268,468	7645	2.93%	238,809	3,155	1.34%	74,388	-3924	-5.0%
Hampshire CSA 2016	No data	N/A	N/A	235,654	N/A	N/A	78,312	7490	11%
Hampshire CSA 2008	260,823	N/A	N/A	No data	N/A	N/A	70,822	N/A	N/A

Hampshire's childcare market supply of providers and places compared to the All England and statistical neighbours

Data suggests a good level of supply of childcare places in Hampshire. Data from both OFSTED and Hampshire indicates that the childcare market has shown reduction in providers with some increase in places overall.

Hampshire currently offers 3.07% of all childcare places in England, an increase of 0.05% since 2008. ⁸The number of providers in Hampshire represents 3.19% of All England childcare market.

Table 7 compares the Hampshire childcare market with that of the Children's Services statistical neighbours.

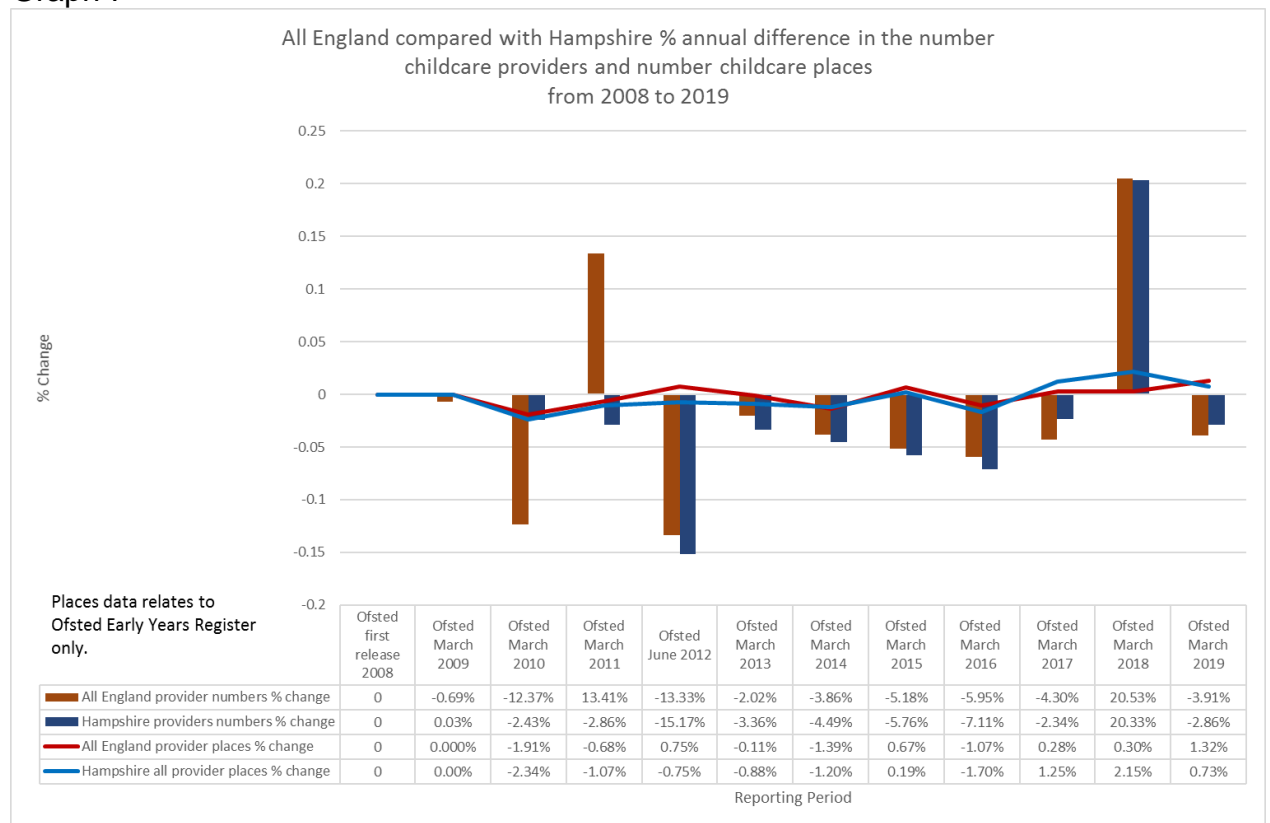
Table 7

Hampshire compared to Childrens Service Statistical Neighbours and all England Number of Childcare Providers and Places as at March 2019 OFSTED All Childcare Registers																		
Local Authority Area	All childcare providers		All childcare places		Childminding				Childcare on non-domestic premises				Childcare on Domestic Premises				Home childcarers	
	Childcare Providers	% All England	Places	% All England	Providers	% All England	Places	% All England	Providers	% All England	Places	% All England	Providers	% All England	Places	% All England	Providers	% All England
Hampshire	2,444	3.19%	40,251	3.07%	1,186	3.04%	6,659	2.77%	929	3.40%	33,501	3.15%	5	2.22%	91	1.89%	324	3.20%
West Sussex	1,329	1.73%	21,244	1.62%	645	1.66%	3,609	1.50%	514	1.88%	17,544	1.65%	5	2.22%	91	1.89%	165	1.63%
Central Bedfordshire	596	0.78%	6,528	0.50%	618	1.59%	2,273	0.94%	114	0.42%	4,255	0.40%	1	0.44%	0	0.00%	116	1.15%
South Gloucestershire	443	0.58%	8,575	0.65%	187	0.48%	1,107	0.46%	197	0.72%	7,448	0.70%	2	0.89%	19	0.39%	58	0.57%
Cambridgeshire	1,165	1.52%	18,575	1.42%	618	1.59%	3,902	1.62%	388	1.42%	14,615	1.37%	3	1.33%	58	1.20%	156	1.54%
Worcestershire	666	0.87%	13,560	1.03%	313	0.80%	2,066	0.86%	314	1.15%	11,364	1.07%	5	2.22%	130	2.70%	34	0.34%
North Somerset	307	0.40%	4,986	0.38%	168	0.43%	1,134	0.47%	106	0.39%	3,792	0.36%	2	0.89%	60	1.25%	31	0.31%
Gloucestershire	869	1.13%	16,261	1.24%	391	1.00%	2,482	1.03%	395	1.45%	13,680	1.28%	5	2.22%	99	2.06%	78	0.77%
Leicestershire	981	1.28%	18,654	1.42%	543	1.39%	3,426	1.42%	389	1.42%	15,188	1.43%	2	0.89%	40	0.83%	47	0.46%
Warwickshire	716	0.93%	14,339	1.09%	375	0.96%	2,488	1.03%	288	1.05%	11,813	1.11%	2	0.89%	38	0.79%	51	0.50%
West Berkshire	323	0.42%	5,154	0.39%	166	0.43%	904	0.38%	107	0.39%	4,250	0.40%	0	0.00%	0	0.00%	50	0.49%
All England March 2019	76,602		1,310,218		38,953		240,724		27,304		1,064,677		225		4,817		10,120	

Graph 7 below compares All England with Hampshire. This shows that Hampshire has experienced some turbulence in change in the number of providers and early years register places which follows similar pattern to All England.

⁸ Based on DfE Early Years and Childcare statistics published 2019

Graph 7



The distribution of Early Years and Childcare places in Hampshire

Table 8 outlines the number of places, providers by type of childcare facility, by borough and district. It shows that Hampshire has a childcare provision of some 2797 providers⁹ delivering 37,094 places

⁹ (2,982 in 2015: 3,500 in 2010: 3,592 in 2008) (44,581 in 2015: 47,802 in 2010, 46,322 in 2008).

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Table 8

Hampshire active childcare providers and place analysis: Types of provision by district as at September 2019																				
District Name	Day Nursery		Pre-school		Childminder		After School club		Breakfast Clubs		Holiday Playscheme		Nursery unit of maintained school		Nursery Unit of Ind. School		Home Childcarer		All provision Total	
	Providers	Places	Providers	Places	Providers	Places	Providers	Places	Providers	Places	Providers	Places	Providers	Places	Providers	Places	Providers	Places	Providers	Places
No District Recorded	3	0	2	0	2	0	8	0	5	0	5	0	0	0	0	0	21	0	46	0
Percentage	1.0%	0.0%	0.5%	0.0%	0.2%	0.0%	3.8%	0.0%	6.4%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0	2%	0%
Basingstoke and Deane District	40	1913	50	1557	187	623	31	120	6	0	14	40	3	119	4	181	34	0	369	4553
Percentage	13.3%	13.1%	13.4%	14.4%	14.6%	14.4%	14.8%	6.8%	7.7%	0.0%	12.8%	2.0%	23.1%	13.9%	12.5%	13.7%	8.6%	0	13%	12%
East Hampshire District	41	1329	30	795	108	393	40	326	5	147	12	250	2	107	5	151	30	0	273	3498
Percentage	13.6%	9.1%	8.1%	7.4%	8.4%	9.1%	19.0%	18.6%	6.4%	10.1%	11.0%	12.6%	15.4%	12.5%	15.6%	11.4%	7.6%	0	10%	9%
Eastleigh District	23	1145	43	1052	125	385	10	162	14	515	6	74	0	0	3	87	21	0	245	3420
Percentage	7.6%	7.9%	11.6%	9.7%	9.7%	8.9%	4.8%	9.2%	17.9%	35.3%	5.5%	3.7%	0.0%	0.0%	9.4%	6.6%	5.3%	0	9%	9%
Fareham District	26	1608	25	750	105	352	13	60	5	0	12	0	0	0	3	182	32	0	221	2952
Percentage	8.6%	11.0%	6.7%	6.9%	8.2%	8.1%	6.2%	3.4%	6.4%	0.0%	11.0%	0.0%	0.0%	0.0%	9.4%	13.8%	8.1%	0	8%	8%
Gosport District	12	675	20	720	62	159	3	0	2	30	4	0	4	300	0	0	14	0	121	1884
Percentage	4.0%	4.6%	5.4%	6.7%	4.8%	3.7%	1.4%	0.0%	2.6%	2.1%	3.7%	0.0%	30.8%	35.1%	0.0%	0.0%	3.5%	0	4%	5%
Hart District	19	997	28	862	190	673	13	150	6	70	12	250	0	0	4	292	42	0	314	3294
Percentage	6.3%	6.8%	7.5%	8.0%	14.8%	15.6%	6.2%	8.5%	7.7%	4.8%	11.0%	12.6%	0.0%	0.0%	12.5%	22.1%	10.6%	0	11%	9%
Havant District	34	1584	21	780	65	205	16	0	5	26	5	0	0	0	0	0	18	0	164	2595
Percentage	11.3%	10.9%	5.6%	7.2%	5.1%	4.7%	7.6%	0.0%	6.4%	1.8%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	0	6%	7%
New Forest District	26	1131	50	1414	100	369	21	461	14	419	12	284	0	0	5	196	25	0	253	4274
Percentage	8.6%	7.8%	13.4%	13.1%	7.8%	8.5%	10.0%	26.3%	17.9%	28.7%	11.0%	14.3%	0.0%	0.0%	15.6%	14.8%	6.3%	0	9%	12%
Rushmoor District	18	700	26	820	122	468	16	260	2	30	8	186	1	52	0		45	0	238	2516
Percentage	6.0%	4.8%	7.0%	7.6%	9.5%	10.8%	7.6%	14.8%	2.6%	2.1%	7.3%	9.3%	7.7%	6.1%	0.0%	0.0%	11.3%	0	9%	7%
Test Valley District	23	1586	40	1145	125	400	21	0	6	0	8	0	2	190	4	234	32	0	261	3555
Percentage	7.6%	10.9%	10.8%	10.6%	9.7%	9.3%	10.0%	0.0%	7.7%	0.0%	7.3%	0.0%	15.4%	22.2%	12.5%	17.7%	8.1%	0	9%	10%
Winchester District	36	1917	37	911	94	294	18	217	8	222	11	906	1	86	4		83	0	292	4553
Percentage	12.0%	13.1%	9.9%	8.4%	7.3%	6.8%	8.6%	12.4%	10.3%	15.2%	10.1%	45.5%	7.7%	10.1%	12.5%	0.0%	20.9%	0	10%	12%
Total	301	14585	372	10806	1285	4321	210	1756	78	1459	109	1990	13	854	32	1323	397	0		
Percentage all provision total	10.8%	39.3%	13.3%	29.1%	45.9%	11.6%	7.5%	4.7%	2.8%	3.9%	3.9%	5.4%	0.5%	2.3%	1.1%	3.6%	14.2%	0.0%	2797	37094

Source: Hampshire Capita Early Years extracted September 2019

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Supply of Childcare for Under 5 year olds

Comparing the number of childcare providers and available places to population led demand (paragraph 4.1), Hampshire evidences a market responding to need. Whilst this does show that Hampshire providers have reduced by 3%, the number of places has significantly increased by 15%. The population of 0 -4 year olds for the same period increased only by 5%.

Table 9 Compares provision and places between 2008 and 2019

COMPARISON OF PRIVATE, VOLUNTARY AND INDEPENDENT SECTOR PROVIDERS OFFERING NURSERY AND PRESCHOOL 2008 AND 2019								
Hampshire District	2008 first CSA		CSA 2019		Comparison between 2008 and 2019			
					Difference in number of providers and places		% Difference in number of providers and places	
	Providers	Places	Providers	Places	Providers	Places	Provider	Places
Basingstoke and Deane Dist	99	3619	94	3651	-5	32	-5%	1%
East Hampshire District	79	2268	76	2275	-3	7	-4%	0%
Eastleigh District	68	1888	69	2284	1	396	1%	21%
Fareham District	58	2277	54	2540	-4	263	-7%	12%
Gosport District	42	1517	32	1395	-10	-122	-24%	-8%
Hart District	54	1518	51	2151	-3	633	-6%	42%
Havant District	47	1617	55	2364	8	747	17%	46%
New Forest District	94	2699	81	2741	-13	42	-14%	2%
Rushmoor District	47	1569	44	1520	-3	-49	-6%	-3%
Test Valley District	59	1939	67	2965	8	1026	14%	53%
Winchester District	78	2353	77	2828	-1	475	-1%	20%
Total	725	23265	705	26714	-20	3449	-3%	15%
Source: 2008 CSA childcare place analysis table and Hampshire 2019 capita early years								
Data for both years excludes nursery units of maintained schools and maintained nursery schools								

Analysis of provider opening patterns indicates a move towards longer weeks opening with a 0.7% growth in those providing all year round and those typically providing 38 weeks or under reducing by 0.5%.

Table 10

Hampshire EYE approved Early Years Providers			
Weeks open	Proportion of total market August 2018	Proportion of total market August 2019	Change in proportion
33 - 37 weeks	2.3%	2.2%	-0.1%
38 weeks	23.8%	23.4%	-0.4%
39 - 49 weeks	43.5%	43.2%	-0.3%
50 - 52 weeks	30.5%	31.2%	0.7%

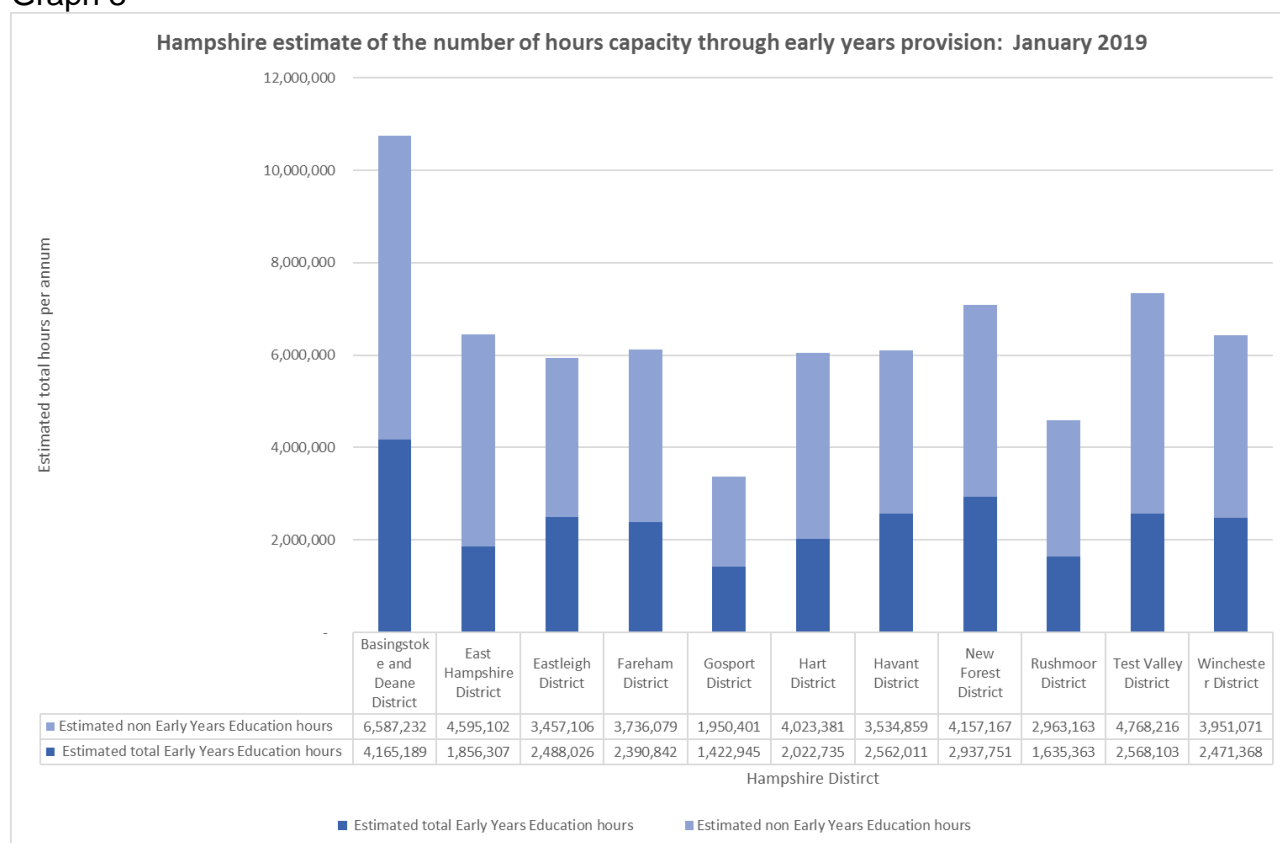
There has been an increase in childminders leaving the sector. Although within Hampshire those that remain are more likely to offer funded Early Years

Education places. In 2016 50% of all childminders were approved for Early Years funding and this has grown to 64% in Spring 2019.

The above analysis in tables 9 and 10 indicates the assumed capacity of places as indicated by Ofsted registration details or provider self declaration. This provides the overall size of the childcare market. Parents take up provision in different time periods and therefore places can be offered more than once in any one day. To support greater understanding of the capacity of provision in terms of hours available, Hampshire has established the size of the market by hours offered.

Graph 8 shows the estimated capacity of the Hampshire funded early years childcare market. The data is from the January early years census where providers confirmed the total number of early years education places offered. The total hours for each provider has then been calculated using the number of days operating, multiplied by the weeks open, multiplied by the number of places.

Graph 8



Hampshire providers registered for under five year olds offer to the Hampshire early years childcare market 38% of hours available for funded early years education places i.e. funded places for two, three and four year olds. The remainder of operational hours informed are available for non funded early years education places and available for younger age groups. Currently graph 3 indicates that there is good access to provision across all age groups and the

amount of hours on offer for funded early years places would seem to meet demand.

Supply of Childcare for 5 year olds and over

Childcare for 5 year olds and over is also referred to as out of school childcare (OSC).

Since 2008, there has been a 34% increase in the number of providers offering breakfast, afterschool and holiday provision, and a corresponding increase of 998 places (8% growth)

Table 11 provides a district based breakdown of OSC growth

District	Comparison of Out of School * Providers and Places between 2008 and 2019							
	2008		2019		Difference from 2008 to 2019		% Difference in number of providers and places	
	Number of Providers	Total Places	Number of Providers	Total Places	Out of School Providers	Out of School Places	Out of School Providers	Out of School Places
Basingstoke and Deane District	41	1591	62	1607	21	16	51%	1%
East Hampshire District	21	978	39	1022	18	44	86%	4%
Eastleigh District	22	591	39	846	17	255	77%	43%
Fareham District	33	1349	50	1434	17	85	52%	6%
Gosport District	32	974	50	980	18	6	56%	1%
Hart District	16	1086	25	1091	9	5	56%	0%
Havant District	27	639	47	897	20	258	74%	40%
New Forest District	38	1063	58	1078	20	15	53%	1%
Rushmoor District	19	757	37	1047	18	290	95%	38%
Test Valley District	26	791	38	981	12	190	46%	24%
Winchester District	30	2077	50	2089	20	12	67%	1%
Total	305	11896	408	12894	103	998	34%	8%

Note: Out of School includes: Before/After and Holiday childcare

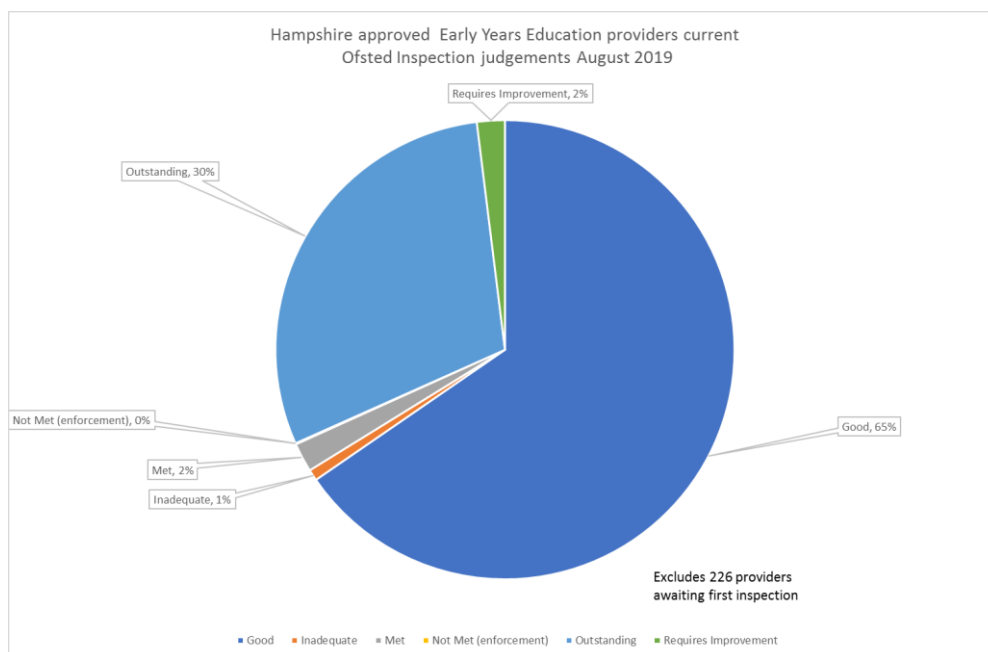
A table with more detail of breakdown of before/after and holiday provision by district is shown in Appendix 2.

7. Quality and Qualification of Childcare Providers

Quality Early Years Foundation Stage Providers

Ofsted data confirmed that 95% of Hampshire early years education providers had inspection outcomes of good or outstanding (August 2019). This compares well with the national position where 96% of early years providers were good or outstanding as at March 2019. Hampshire's percentage of Outstanding judgement was higher with 30% compared to 20% in the Ofsted published data. See appendix 3 for a breakdown of provider quality by district.

Figure 2 – Ofsted outcomes for Early Years Education providers



Quality Foundation Stage Outcomes

Having sufficient good quality early years childcare in Hampshire has an impact upon outcomes for young children. Early Years Foundation Stage (EYFS) data since 2013, (when the new Early Years profile was introduced), suggests that children in Hampshire do better than the national average against the key Good Level of Development (GLD) measure and in all individual areas of learning. This is an increasing trend (table 12).

Table 12

% achieving GLD			
	2017	2018	2019
England	70.7%	71.5%	71.8%
Hampshire	75.7%	76.7%	77.0%
Difference	+5.0	+5.2	+5.2

APS scores			
	2017	2018	2019
England	34.5	34.6	34.6
Hampshire	35.0	35.6	35.8
Difference	+0.5	+1.0	+1.2

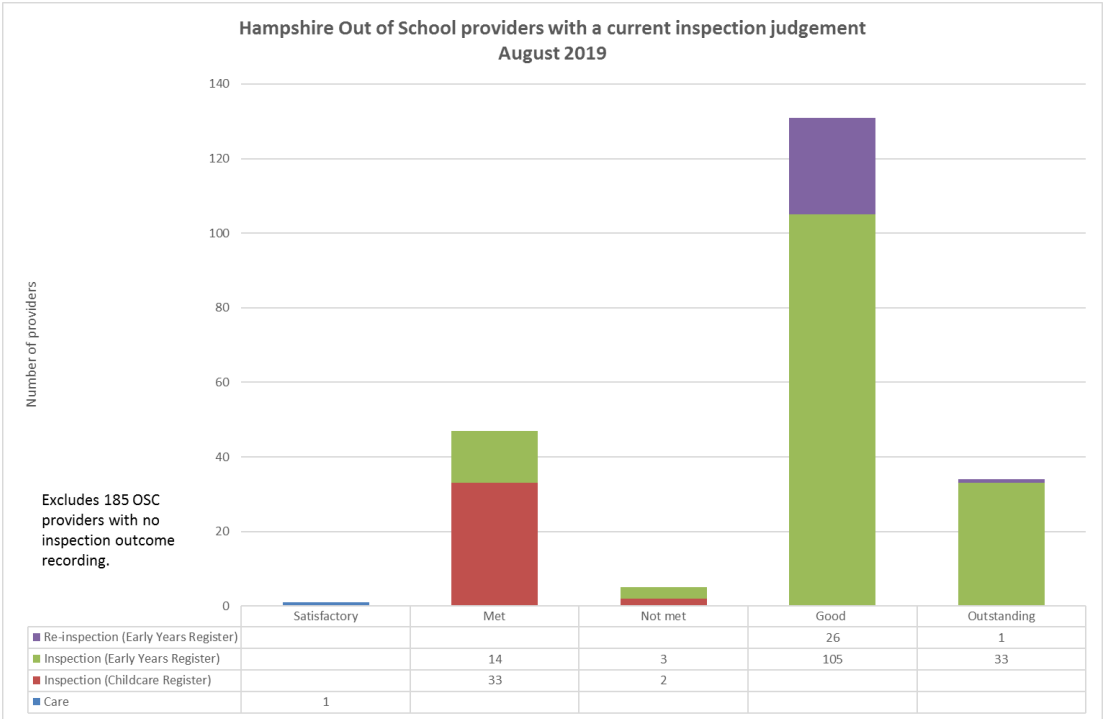
GLD has continued to remain significantly above the national average. It is likely that the GLD outcomes will place Hampshire in the top ten local authorities for GLD as it has been for the past seven years. This indicates that children are being well prepared for the next phase of education in Key Stage 1.

Average Point Score, an indicator of the number of children who are exceeding the expected level has also increased again and is increasingly greater than the national average for the third consecutive year. This indicates that significant numbers of children are achieving at a higher level than the national average. See appendix 1 for more details.

Quality of Out of School Providers

Of those providers offering a breakfast club, after school club, holiday provision and were OFSTED registered on the Early Years Register /Childcare Register, 76% were good or outstanding. There is no direct comparison of national data available at this time.

Graph 9 – OSC Ofsted outcomes



Qualification of people in Childcare Workforce

Qualification of staff delivering Early Years Foundation Stage

The DfE requires providers to inform them of the qualification status of their staff through the statutory Annual Spring Early Years Census.

The Council collects further staff qualification information alongside the Early Years Census to enable the Quality supplement¹⁰ to be applied in the early years funding formula.

The number of people working to deliver Early Years Foundation Stage (EYFS) has reduced year on year and since 2014, an overall 7% reduction is noted (Table 13)

Table 13

Hampshire Childcare Workforce delivering EYFS to 3 and 4 year olds			
Period	Total Workforce	Change per year	% Change per year
Spring 2014	6401		
Spring 2015	6453	52	0.8%
Spring 2016	6073	-380	-5.9%
Spring 2017	6388	315	5.2%
Spring 2018	6255	-133	-2.1%
Spring 2019	5937	-318	-5.1%
Change Spring 2014 to Spring 2019		-464	-7.24%
Source: Hampshire EYNFF/Census January collection			

The EY Foundation Stage statutory framework requires that for group provision the manager (and nominated deputy) must hold a level 3 qualification. Furthermore, at least half of all other staff must hold at least a full and relevant level 2 qualification. In Spring 2019, 82% of the Early Years childcare workforce held a level 3 and above qualification. This is an improved position on 2017 where the percentage was 81%. Overall, the EY foundation stage workforce within Hampshire remains well qualified and operates with more level 3 qualified staff than EYFS minimums. Appendix 4 outlines the qualification levels of staff by district.

Nationally and locally the sector indicates that recruiting and retaining qualified staff is a challenge. The ability for the sector to maintain levels of qualified staff is being reported as a cost pressure due to competition from other employment sectors, such as retail, where salary and employment terms and conditions may be more attractive.

¹⁰ Quality Supplement: The staff qualification element of the quality funding band is calculated from the total number of weighted hours (level of qualification but only weighted if level 3 or more) multiplied by paid hours divided by the total number of paid hours.

Qualification of staff delivering Out of School childcare

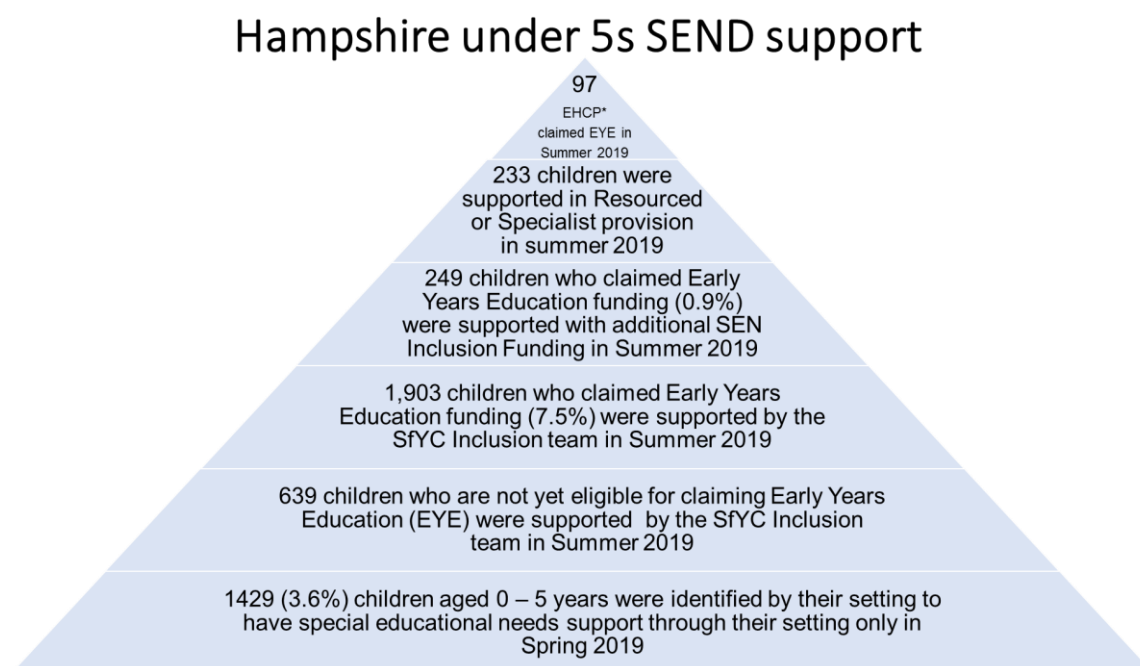
There are two Ofsted registers that apply to Out of School childcare. For those providers that deliver provision for children aged 8 and under they are required to register under the Early Years Foundation stage. For those that provide for children over 8 years of age they can register under the Childcare Register. Both registers require a minimum qualification requirement for staff.

There is no statutory requirement for the local authority to collect qualification data from providers of out of school delivery and therefore there is no comparative information to consider.

8. Special Educational Needs

To consider the demand for places for children with special educational needs the Council uses the data collected from the mandatory SEN Inclusion fund; the children receiving SEN support from the council's inclusion team; and Portage as well as data collected from early years providers. Figure 3 outlines the number of children supported in the summer 2019 across the range of support offers available.

Figure 3



The pyramid identifies 7.5% of children (1,903) who claimed EYE in the summer term 2019 also had targeted SEN support from the SfYC Inclusion team.

In support of establishing better data and information on the numbers of children with additional needs, the Council's annual provider data collection in Spring 2019 asked providers to identify children whom they were supporting for emerging SEN, but not yet been referred to a specialist/agency for assessment.

Table 14 shows that there were 1,429 (3.6%) of children aged 0-5 years attending the setting being supported by the provider's SENCO and the early years practitioners. This indicates that there is a good spread of provision across the county that is supporting the individual needs of children.

Table 14

Hampshire Spring 2019 EYNFF Census Provider declared children being supported with SEN							
District	Childminder	Day nursery	Pre-school	Local authority maintained nursery	Nursery unit of independent school	School governor run nursery/ nursery unit of a school	Total
Basingstoke and Deane	6	90	129	7	1	0	233
East Hants	3	47	32	0	4	2	88
Eastleigh	4	39	85	0	2	0	130
Fareham	5	68	22	0	6	4	105
Gosport	3	35	68	0	0	1	107
Hart	3	30	55	0	4	0	92
Havant	0	72	77	0	0	9	158
New Forest	7	45	106	0	3	8	169
Rushmoor	3	22	75	0	0	0	100
Test Valley	16	67	55	1	6	2	147
Winchester	5	45	45	3	0	2	100
Total	55	560	749	11	26	28	1429
%	3.8%	39.2%	52.4%	0.8%	1.8%	2.0%	
<i>Note: Children being supported by the EY provider inclusive practice: not yet engaged with agency or specialist assessment.</i>							

The Council's inclusion fund for early years was amended in April 2018 in alignment with the Early Years National Funding formula requirement to establish a Special Education Needs Inclusion fund (SEN IF). This fund allows all Childcare providers to apply for a higher level of funding to contribute to meeting the specific educational needs of children and in Summer 2019, 249 children were supported with this funding. Figure 3 above shows the total numbers of children being supported for specific educational needs across different aspects of support.

Out of School childcare

In September 2016 the Government introduced a parental 'right to request' wraparound and holiday childcare at the school where their child attends.

In September 2017 the Government introduced Tax Free Childcare which provides financial contribution to working parent to support childcare costs. This policy complemented 30 hours early years entitlement for nursery aged children of working parents.

At this time there is no take-up data regarding the numbers of children accessing out of school childcare and there is no statutory requirement to gather this data. Therefore, it is possible to consider that a proxy demand for Out of School could be derived from the extended entitlement data. Child level claim data has been matched to school entry at Year R and this suggests that 41% of the Year R cohort in September 2019 was a 30 hour claimant. This is a small growth of 3% on 2018 as shown in table 15.

Table 15

Hampshire Extended Entitlement (30 Hours) Claimants moving to Year R					
School District	Year R Pupil Admission Numbers 2019	30 hours claimants moved to Year R 2019	% of Year R	30 hours claimants moved to Year R September 2018	Proxy % of Year R based on 2019 PAN
Basingstoke and Deane District (B)	2322	907	39%	853	37%
East Hampshire District	1378	480	35%	391	28%
Eastleigh District (B)	1564	750	48%	730	47%
Fareham District (B)	1320	675	51%	648	49%
Gosport District (B)	995	361	36%	338	34%
Hart District	1254	531	42%	468	37%
Havant District (B)	1335	523	39%	519	39%
New Forest District	1750	683	39%	686	39%
Rushmoor District (B)	1238	422	34%	355	29%
Test Valley District	1607	674	42%	608	38%
Winchester District (B)	1477	613	42%	571	39%
Total	16240	6619	41%	6167	38%
Source info:					
PAN from HCC Data and Information Team					
30 hours claims from HCC Capita One					

A survey of schools has been commissioned in Summer 2019 to update information held by the Council about out of school provision. At this time results are being analysed. The council is also in process of recruiting a temporary Out of Schools Childcare development officer to support in developing a more detailed assessment of this area of childcare.

9. Assessment of future childcare need

Childcare requirement Under Fives

Based on current trends in take up outlined at section 5 of this report, the following table 16 considers the number of places likely to be required based on population basis. The number of childcare places known for the under five year olds has also been added to provide a benchmark ratio of child numbers per place.

Table 16

HAMPSHIRE EARLY YEARS AND CHILDCARE ESTIMATE OF PLACE REQUIREMENT 2019 TO 2025												
Year	Babies 0 year to < 2 years		2 years to < 3 years			3 years to < 4 years		4 years to < 5 years		Total estimate of possible place requirement	Childcare places for 0-5 year olds known at 2019	Ratio of child per place
	Population Babies 0 year to < 2 years	Estimate of possible demand based at 18%	Population 2 years to < 3 years	Estimate of possible demand based at 70%	Estimate of possible funded places based at 16%	Population 3 years to < 4 years	Estimate of possible funded places based at 97%	Population 4 years to < 5 years	Estimate of possible funded places based at 40%			
2019	28565	5142	14784	10349	2365	15585	15117	15615	6246	36854	31889	1.16
2020	29594	5327	14562	10193	2330	15258	14800	15936	6374	36695	31889	1.15
2021	30163	5429	15410	10787	2466	15137	14683	15775	6310	37209	31889	1.17
2022	30614	5511	15715	11001	2514	15915	15438	15630	6252	38201	31889	1.20
2023	30875	5558	15857	11100	2537	16130	15646	16275	6510	38814	31889	1.22
2024	31012	5582	15943	11160	2551	16221	15734	16437	6575	39051	31889	1.22
2025	31081	5595	16006	11204	2561	16288	15799	16511	6604	39203	31889	1.23

Small Area Population Forecast version June 2019
 % Estimate based of data collected at Spring census 2019.

In 2008 there were 30,860 under five year old places and in 2019 this has grown to 31,889 (4%). The places have kept in line with population growth where between 2008 and 2019 there has been a 5% increase in under five year olds. The penetration of places per 100 population in 2019 is 43 which is the same as it was in 2008 for this cohort age.

Using 43 places per 100 as a benchmark indicator of sufficiency and looking forwards to the population changes, there would need to be in the order of 1,000 more childcare places by 2025 to retain this benchmark value for under 5 year olds.

Assessment early years education entitlement demand projection

Using the council's Small Area Population Forecast (June 2019) and trends in current take up patterns a three year forward projection has been produced (Table 17). This outlines the anticipated number of children and the estimated number of hours required from the market to deliver the early years funded entitlements. It should be noted that the population of children aged two, three and four year old will increase in this period. The table includes the year 2017/18 as in the autumn of this year the extended entitlement was implemented.

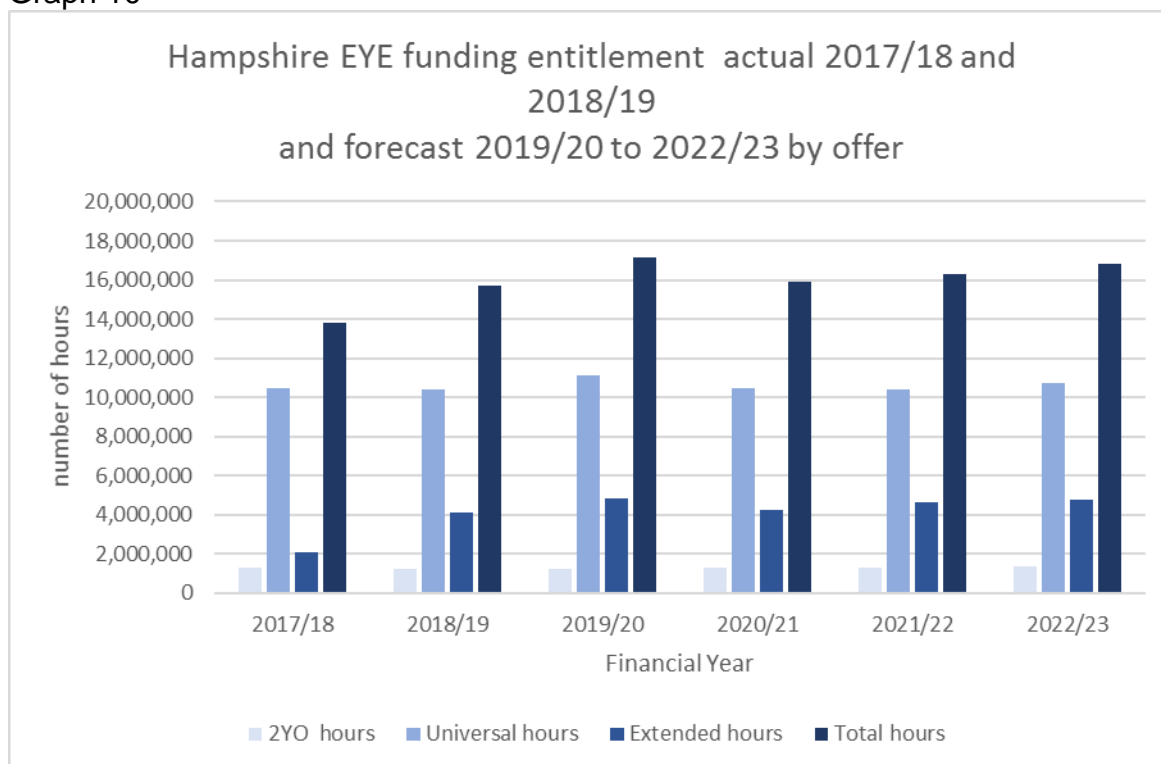
Table 17

Hampshire Early Years Education Funding Take Up and Projection						
YEAR	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Age	Population (2017 SAPF)	Population (2018 SAPF)	Population (2019 SAPF*)	Population (2019 SAPF*)	Population (2019 SAPF*)	Population (2019 SAPF*)
2YO total population	14,996	15,175	14,785	14,566	15,411	15,724
3YO total population	15,251	15,312	15,575	15,263	15,142	15,908
4YO total population	16,261	15,578	15,606	15,929	15,778	15,627
Total	30,247	30,487	30,360	29,829	30,553	31,632
% change in total population		0.8%	-0.4%	-1.7%	2.4%	3.5%
Funding period	Actual child claims by entitlement	Actual child claims by entitlement **	Estimated child entitlement claims	Estimated child entitlement claims	Estimated child entitlement claims	Estimated child entitlement claims
Summer	26,167	35,752	37,617	37,676	37,300	37,860
Summer % change		37%	5.2%	0.2%	-1.0%	1.5%
Autumn	23,620	24,414	24,688	24,476	24,439	25,604
Autumn % change		3%	1.1%	-0.9%	-0.2%	4.8%
Spring	30,610	31,625	32,118	31,773	32,075	33,337
Spring % change		3%	1.6%	-1.1%	1.0%	3.9%
Funding Period	Actual hours claimed 2017/18	Actual hours claimed 2018/19	Estimated hours to be claimed 2019/20	Estimated hours to be claimed 2020/21	Estimated hours to be claimed 2021/22	Estimated hours to be claimed 2022/23
Summer	4,875,936	6,589,612	7,242,560	6,586,512	6,554,960	6,655,477
Autumn	4,409,875	4,557,518	5,107,924	4,580,155	4,746,124	4,972,512
Spring	4,486,189	4,537,386	4,795,102	4,749,167	5,009,346	5,210,617
Total for year	13,772,000	15,684,516	17,145,587	15,915,833	16,310,430	16,838,606
increase/decrease hours		1,912,516	1,461,071	-1,229,753	394,596	528,176
% change in hours		13.9%	9.3%	-7.2%	2.5%	3.2%
* SAPF 2019 is based on the June update						
** increase due to introduction of the extended entitlement which start Autumn 2017						

Graph 10 outlines the change in the type of offer. During 2019/20 (current year) it is anticipated there will be estimated growth of 9.3% in hours requirement from that of 2018/19. The growth will come from increases in the universal and extended entitlements with little change in two year old demand.

The anticipated reduction in population in 2020/21 will have an impact on the hours required and hours are forecast to reduce by 7.2% in this year. The population is expected to increase in 2021/22 and this anticipates a 2.5% increase in overall hours required, made up from two year old and extended hours, with the universal entitlement remaining at a similar level to 2020/21. Further growth of 3.2% is anticipated across all early years funded entitlements in 2022/23.

Graph 10



Out of school childcare

Assessment of out of school childcare is limited. There is no take up data for out of school childcare. The childcare market indicates it offers in the region 5,000 places for out of school childcare although the figure may be understated figure at this time.

We anticipate that parents that have received flexible childcare for 30 hours are most likely to seek a school where there is a good out of school childcare offer.

Table 18 provides a proxy indicator of the numbers of children moving into Year R in 2020 who are likely to have received Extended Entitlement (30 hours funding) at their early years education provider. The childcare offer within early years is very flexible and operates from 6am to 8pm and there are working families that take advantage of these services.

The table provides an estimate of the number of children in the primary phase and it is anticipated that 42% of Pupil Admission Numbers in September 2020 will have had 30 hours.

Table 18

Hampshire Extended Entitlement (30 Hours) Estimate of Claimants moving to Year R					
School District	Year R Pupil Admission Numbers 2019	30 hours claimants moved to Year R 2019	Estimate 2% increase for 2020 moving to Year R	<i>Estimate of % of Yr R based on 2019 PAN</i>	Total potential 30 hours claimants in Yr R/Yr1/Yr2 for September 2020
Basingstoke and Deane District (B)	2322	907	925	40%	2685
East Hampshire District	1378	480	490	36%	1361
Eastleigh District (B)	1564	750	765	49%	2245
Fareham District (B)	1320	675	689	52%	2012
Gosport District (B)	995	361	368	37%	1067
Hart District	1254	531	542	43%	1541
Havant District (B)	1335	523	533	40%	1575
New Forest District	1750	683	697	40%	2066
Rushmoor District (B)	1238	422	430	35%	1207
Test Valley District	1607	674	687	43%	1969
Winchester District (B)	1477	613	625	42%	1809
Total	16240	6619	6751	42%	19537

Source info:

PAN from HCC Data and Information Team

30 hours claims from HCC Capita One

Data from the Family Information Service suggests that families currently do find solution to meet their needs. However, with the good take up of 30 hours childcare seen in Hampshire it is recognised that demand levels for out of school childcare are likely to increase. This too will include SEN as access to this offer increases by these families.

10. Childcare fees and charges

Early Years and Childcare providers secure income through parental fees and those approved will also claim early years education grant from the local authority. Depending on the type of organisation and childcare offer will determine the balance of the parental fees to EYE funding.

Coram Family and Childcare collects price information from local authorities to compile their annual childcare costs survey. Hampshire's data for 2019 survey informed:

Table 19

Price of 25 hours a week childcare for children two, three and four year old at nurseries and childminders					
	Nursery Under two	Two	Childminder Under two	Two and over	Three and four year olds
Great Britain	£127.12	£124.04	£113.31	£112.02	
England	£128.98	£125.77	£114.37	£112.92	£49.23
South East	£137.04	£135.50	£120.40	£117.62	£50.93
Hampshire	£130.36	£127.21	£106.12	£106.12	£49.40

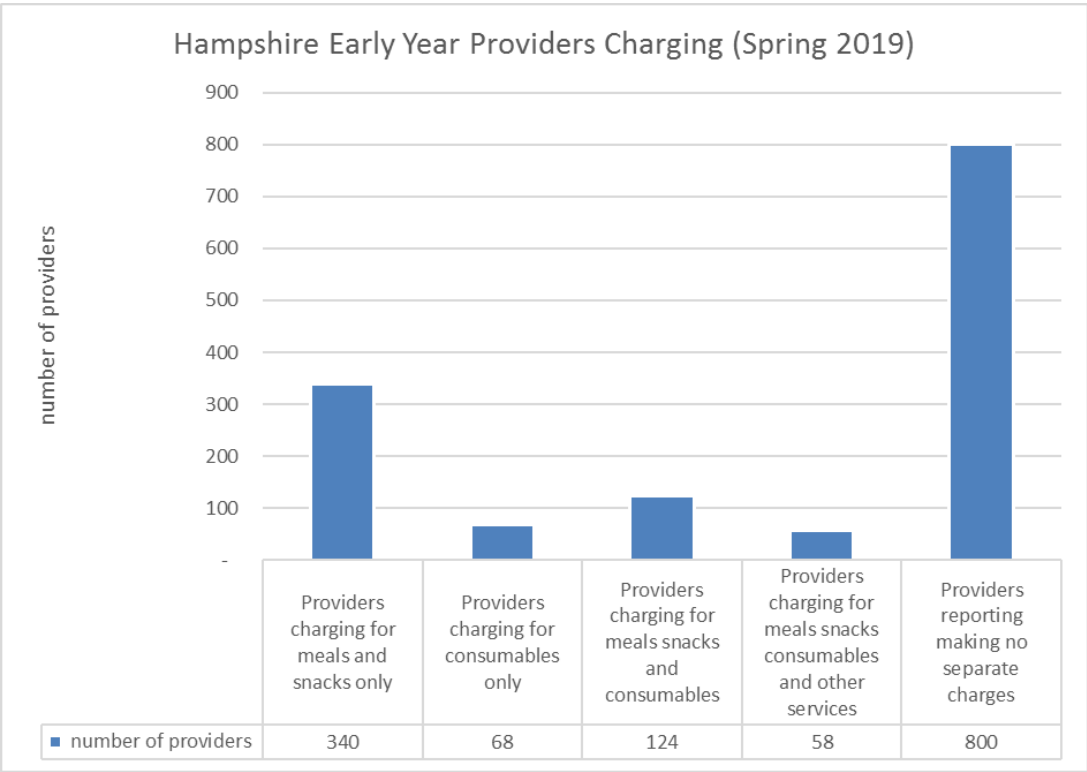
The Coram 2019 indicated that nationally costs of childcare have increased in the region of 4% which is slightly above inflation. Hampshire fees are broadly in line with those of the South East and of England.

Permitted charges for funded early years education

In 2017 the DfE revised the statutory guidance confirmed the Government funding was intended to deliver 15 or 30 hours a week of free high-quality flexible childcare. It outlined that it was not intended to cover the cost of meals, other consumables, additional hours and or additional services. Providers were allowed to make charges and receive payment for these areas.

To consider how many Hampshire providers are seeking to implement the permitted charges, the Spring 2019 data collection for the first time robustly asked providers about additional charges. Figure 4 indicates that, of the 1,400 approved early years education providers making the return, 58% indicated no separate charges were made with 37% of providers making permitted charges for meals and snacks. Separate to permitted meals and snacks 18% of Hampshire providers recover costs of consumables through the allowed voluntary consumable charge. This is an area of monitor to ensure that providers are transparent about what charges are applied to funded early years places.

Figure 4



11. Childcare market concerns

As part of the early years census we asked providers to indicate any concerns regarding recruitment and retention of the childcare workforce and the snap shot take at that time suggested the majority of providers had little concern.

However, within the Early Years funding consultation Summer 2019 there was opportunity for providers to inform of any aspects of concern regarding their business and many cited cost pressures in recruiting and retaining qualified staff

Providers also informed of the continued costs pressure faced with regards to business rate increases; employers contribution to pensions; national living wage increased and the erosion of salary differential; inflation costs that are not supported by an early years hourly rate that has been cash limited for a number of years.

12. Conclusion

Hampshire continues to have a high quality and responsive childcare market. There is a good mix of provision including childminders. The market continues to support funded two year olds and has responded well to introducing the extended entitlement for working parents (30 hours). The market has sustained its capacity for three and four year olds with 97% of all three and four year olds accessing provision.

The growth in the numbers of three and four year olds accessing extended entitlement (30 hours) is expected to impact on the requirement for confirmed out of school childcare. There is currently limited data around the size of the out of school childcare market and assessment is difficult to be made.

Housing developments and subsequent population growth will require careful market management over the course of the next 5 years. Also areas of low child population, e.g. Rural areas will need a careful watch to ensure parents are supported to access provision to meet their needs.

Better data recording of SEND children has shown there to be a good offer for children and the numbers of children accessing early years education, including extended entitlement (30 hours) has grown and the childcare market has developed its local SEND offer to meet these needs.

The sector continues to cite financial difficulties and workforce recruitment and retention of qualified staff. Having sufficient and appropriately qualified staff will be key to ensuring stability in the childcare market and its ability to augment and deliver the anticipated growth.

13. ACTION PLAN

It should also be noted that childcare sufficiency is a dynamic process of which the childcare market changes according to demand and supply and other environmental and regulatory factors. The childcare development team keep childcare providers informed of known changes through regular communications through the Services for Young Children blog and termly provider briefings. To keep Parents informed the council's Family Information Services Hub of childcare operators and providers' SEND Local offers, together with a termly newsletter for parents and stakeholders.

The childcare sufficiency assessment has outlined some areas where further action is needed to understand specific elements of the changing childcare market. The action plan has set out the key areas that will be addressed over the next two years.

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Childcare Sufficiency Actions 2019/20 – 2020/21

KEY AREAS FOR DETAILED SCRUTINY AND ASSESSMENT ACROSS ALL HAMPSHIRE DISTRICTS FOR THE FOLLOWING CATEGORIES AND ESTABLISH A MONITORING PROCESS FOR THESE KEY AREAS:

- **CHILDCARE FOR UNDER TWOS AND TWO YEAR OLDS** – Capacity of the market and assessment against population.
- **OUT OF SCHOOL CHILDCARE** – Capacity of the market and assessment against trends in 30 hours take up.
- **RURAL CHILDCARE:** Review Capacity of the market and assessment of rural sustainability and assessment against population.
- **CHILDCARE FOR NEW HOUSING DEVELOPMENTS:** Review all known housing developments and phasing to determine the future childcare needs.

PROVIDER SUSTAINABILITY:

- Continued development and implementation of a set of early indicators to support Development Officers to identify risks to childcare sufficiency in the childcare market.
- Continued review of the costs pressures of childcare providers to inform strategies to strengthen the provider base where possible.

EARLY YEARS EDUCATION:

- Continued monitor of 2 year old funding to ensure access, and taking action to maintain access if appropriate.
- Continued monitor of 30 hours childcare to ensure access and taking action to maintain access if appropriate.
- Continued monitor to ensure take up of entitlements for disadvantage children: Early Years Pupil Premium: Disability Access Fund; SEND, and taking action to maintain access if appropriate.

OUT OF SCHOOL (OSC) :

- Recruitment of (temporary) dedicated project officer to assess OSC/Holiday scheme provision and develop strategy.
- Development of data set to share with schools on 30 hours take up of new Year R in-take to support schools planning for new intake and potential demand for out of school provision.
- Targeted data collection from out of school clubs and schools to inform OSC place planning.

CHILDCARE WORKFORCE

- Continued promotion of childcare as a career choice at job fairs and liaison with Job Centre Plus.
- Continued development with Further Education colleges, Housing Associations, and Job Centre Plus of the roll out of “Sector Based work academy- childcare” programme to support new entrants to childcare workforce.
- Continued monitor through EYNFF survey of the numbers of staff and qualification in the sector.

Gosport <ul style="list-style-type: none"> • Generally sufficient early years places with exception of Lee on Solent. – review being undertaken to identify providers who can expand provision to fill the gap. • Ongoing review when changes in market presented. 	Fareham <ul style="list-style-type: none"> • Generally sufficient places. • Ongoing review when changes in market presented. • Longer term view for Western ward to accommodate new housing. 	Havant <ul style="list-style-type: none"> • Generally sufficient places. • New housing developments review of any impact particularly Hayling Island. 	Test Valley <ul style="list-style-type: none"> • Generally sufficient places. • 2 year old take up low. Implement communication strategies with parents and providers and Health Visitor to promote the offer and availability of places. • Continue to monitor of Military Families within the district (Salisbury plain). 	Eastleigh <ul style="list-style-type: none"> • New housing developments prioritising supporting premises providers to appoint early years providers. • Some childcare gaps in some wards (rural). Implement a business conversation with rural settings to determine a local feasibility and options available based on population forecast and demand. 	New Forest <ul style="list-style-type: none"> • New housing developments prioritising supporting premises providers to appoint early years providers. • Some childcare gaps in some wards (rural). Implement a business conversation with rural settings to determine a local feasibility and options available based on population forecast and demand. • Some increase required in childcare places through extending existing early years providers range of offer.
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Winchester <ul style="list-style-type: none"> Some increase required in childcare places through extending existing early years providers range of offer. New housing developments prioritising supporting premises providers to appoint early years providers. 	Rushmoor <ul style="list-style-type: none"> Some increase the number of childcare places required. 2 year old take up is low. Implement communication strategies with parents and providers and Health Visitor to promote the offer and availability of places. New housing developments prioritising supporting premises providers to appoint early years providers 	Hart <ul style="list-style-type: none"> Generally sufficient places New housing developments prioritising supporting premises providers to appoint early years providers. 	East Hants <ul style="list-style-type: none"> Some increase required in childcare places through extending existing early years providers range of offer. Bordon area new housing developments – implement a review of the proposed housing demand and current childcare available to assess if further places are needed and ensure housing development plans include options for childcare as required. 	Basingstoke & Deane <ul style="list-style-type: none"> Generally sufficient places. New housing developments prioritising supporting premises providers to appoint early years providers. 	<i>Left intentionally blank</i>
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APPENDIX 1 Hampshire EYFS analysis 2019.

Key National Indicators.

% achieving GLD			
	2017	2018	2019
England	70.7%	71.5%	71.8%
Hampshire	75.7%	76.7%	77.0%
Difference	+5.0	+5.2	+5.2

APS scores			
	2017	2018	2019
England	34.5	34.6	34.6
Hampshire	35.0	35.6	35.8
Difference	+0.5	+1.0	+1.2

GLD has continued to remain significantly above the National Average. It is likely that the GLD outcomes will place Hampshire in the top ten LAs for GLD as it has been for the past seven years. This indicates that children are being well prepared for the next phase of education in KS1.

APS, an indicator of the number of children who are exceeding the expected level has also increased again and is increasingly greater than the National Average for the third consecutive year. This indicates that significant numbers of children are achieving at a higher level than the average.

Other key indicators.

All prime and specific areas of learning remain markedly above the National Level as they have done for the last five years.

% of children, by FSM, achieving GLD.									
	2017			2018			2019		
	FSM	Not FSM	Difference	FSM	Not FSM	Difference	FSM	Not FSM	Difference
England	56%	73%	17	57%	74%	17	57%	75%	18
Hampshire	56%	77%	21	56%	79%	23	58%	79%	21
Difference	0	+4		-1	+5		+1	+4	

Outcomes for children eligible for FSM have improved and for the first time are above the National Average. The gap between FSM and non-FSM has narrowed although remains greater than the National Average, mainly due to the high performance of non FSM children.

% of SEN support, achieving a GLD			
	2017	2018	2019
England	27%	28%	29%
Hampshire	27%	30%	34%
Difference	0	+2	+5

% of Statement/EHCP, achieving a GLD

	2017 (244)	2018 (240)	2019 (287)
England	4%	5%	5%
Hampshire	8%	6%	10%
Difference	+4	+1	+5

Outcomes for children with SEN again have seen positive improvement year on year.

Areas for continued development:

Whilst every indicator for the EYFS is extremely strong, particularly when compared against the National indicators, there remain some areas for continued focus.

1. **GLD:** Whilst the LA will be one of the highest performing LAs in the county with 77% achieving GLD there are still 23% of children who don't, or 3450 children entering Year 1 not fully equipped to meet the needs of the KS 1 curriculum.
2. **FSM:** Outcomes indicate year on year improvement but with only a little over half of children with FSM (58%) this group remains a key focus group for support. 593 children with FSM did not achieve a GLD.

Actions planned to support improved provision and outcomes for 2019/20.

At the heart of all support is the knowledge that developing the quality of provision and the practice of adults working with young children is key. Alongside this is developing the confidence, willingness and ability to meet the unique learning needs of all children but most importantly the most vulnerable, shape the varied and wide offer we make.

Whilst the EYFS data is captured at the end of Yr R, the EYFS stage covers children from 0-5 years of age. The focus of our support therefore targets three distinct groups – schools, settings and parents. Development will predominantly focus upon the following areas of learning - Personal, Social and Emotional Development, Physical Development, Communication and Language, and Literacy and the importance of the Home Learning Environment (HLE)

Outline plan of support strategies.

Activity	Type	Target Group	Key Focus
Headteacher briefings	Core	HT and Yr Leads	Quality of provision Leadership and Management HLE
Yr R networks	Core	Yr R leads and teachers	Moderation Transition HLE
Birth to Four (B24)	Core	Setting practitioners	Moderation Transition

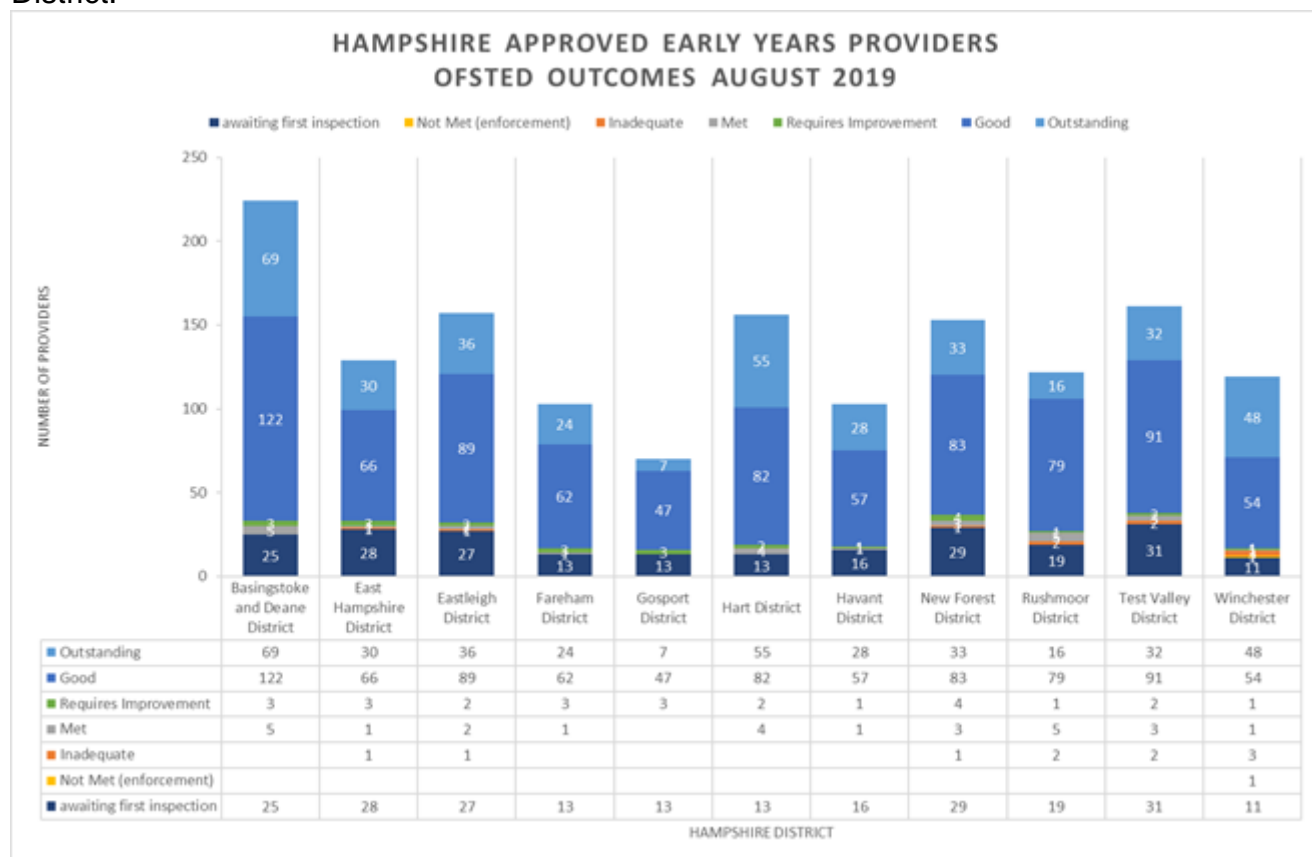
			HLE
Provider briefings	Core	Setting managers/owners	Quality of provision Leadership and Management HLE Finance etc
Moderation training	Core	Yr R leads, teachers, LSAs	Moderation Agreement trialling
County project	Bespoke	10 x target schools 30 x linked pre-schools	Quality of provision FSM Speech and Language HLE
Face to face training	Bespoke	Schools and settings	All areas of learning Role of the adult HLE L+M
Online training	Bespoke	Schools and settings	All areas of learning Role of the adult HLE L+M

APPENDIX 2 Comparison by district of out of school and holiday provision 2008 and 2019

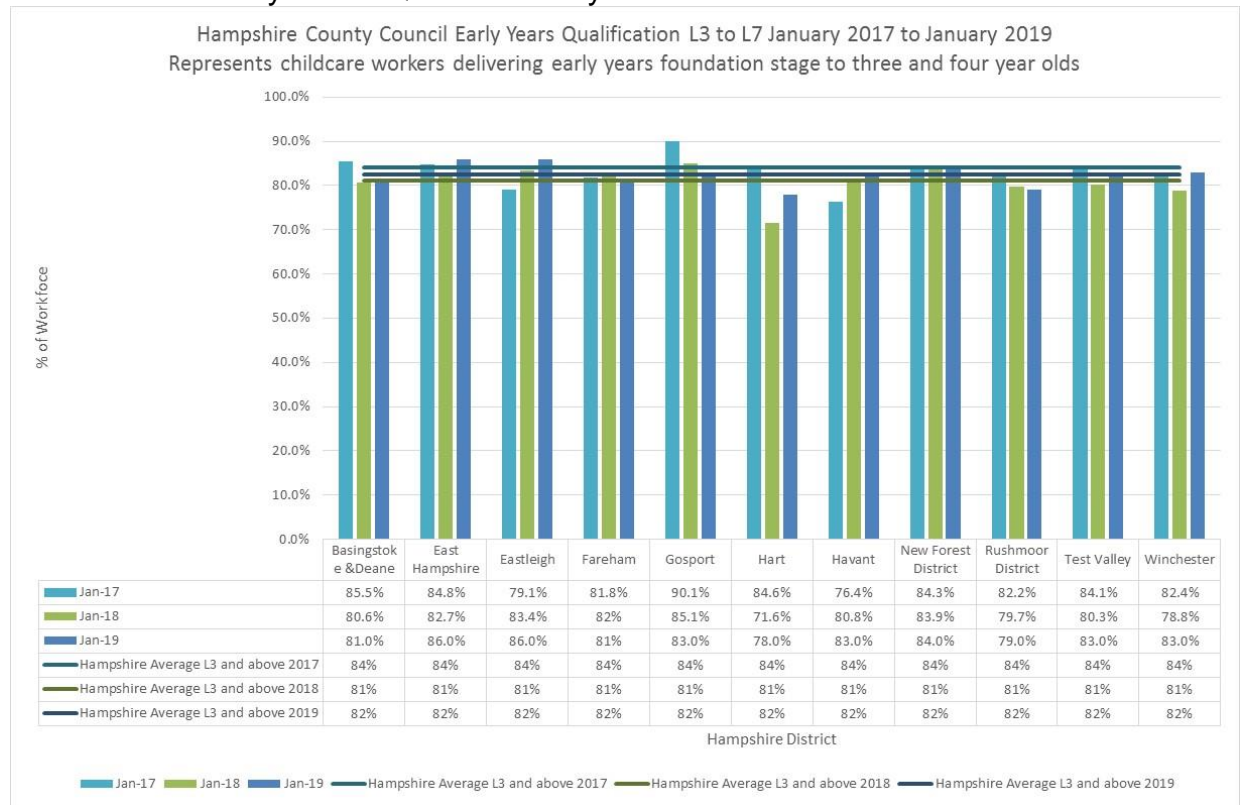
COMPARISON OF OUT OF SCHOOL AND HOLIDAY PROVISION SECTOR PROVIDERS 2008 AND 2019												
Hampshire District	2008 first CSA						CSA 2019					
	Out of School Providers	Out of School Places	Holiday schemes	Holiday places	Total Out of School Provider	Total Out of School Places	Out of School Providers	Out of School Places	Holiday schemes	Holiday places	Total Out of School Provider	Total Out of School Places
Basingstoke and Deane District	25	924	16	667	41	1591	57	1607	5	0	62	1607
East Hampshire District	17	722	4	256	21	978	25	982	14	40	39	1022
Eastleigh District	17	408	5	183	22	591	27	596	12	250	39	846
Fareham District	22	701	11	648	33	1349	44	1360	6	74	50	1434
Gosport District	26	644	6	330	32	974	38	980	12	0	50	980
Hart District	11	646	5	440	16	1086	21	1091	4	0	25	1091
Havant District	19	384	8	255	27	639	35	647	12	250	47	897
New Forest District	23	498	15	565	38	1063	53	1078	5	0	58	1078
Rushmoor District	13	439	6	318	19	757	25	763	12	284	37	1047
Test Valley District	22	563	4	228	26	791	30	795	8	186	38	981
Winchester District	18	1356	12	721	30	2077	42	2089	8	0	50	2089
Total	213	7285	92	4611	305	11896	397	11988	11	906	408	12894

Source: 2008 CSA childcare place analysis table and Hampshire 2019 capita early years

APPENDIX 3 Hampshire Approved Early Years Providers Ofsted Outcomes by District.



APPENDIX 4 Early Years Qualification by district.



APPENDIX 5 Hampshire Major Housing Developments

HAMPSHIRE MAJOR DEVELOPMENTS JULY 2019				
District	Development	Planning Status	Total Number of Dwellings	Early Years
Basingstoke	East of Basingstoke	Local Plan allocation	Up to 450 with opportunity to grow to 900	Review of need with local supply required
	Hounsme Fields	Granted	750	Review of need with local supply required
	Golf Course	Pending Approval	1,100	Review of need with local supply required
	Manydown	Pending Approval. Re-submission of planning application likely early Autumn	Up to 3500	Early years facilities requested: 4 x 90 place nurseries, 3 x 40 place pre-schools
East Hampshire	Hazelton Farm	Pending Approval	850	Review of need with local supply required
	Whitehill / Bordon	Granted	4000	Review of need with local supply required

District	Development	Planning Status	Total Number of Dwellings	Early Years
Eastleigh	Stoneham Park, Chestnut Avenue	Granted	1100	On site EY provision
	Boorley Park	Granted	1400	On site EY provision opens March 2020
	Boorley Gardens, Hedge End	Granted	680	Review of need with local supply required
	Woodhouse Lane, Hedge End	Granted	680	Review of need with local supply required
	Horton Heath	Granted outline consent – subject to new s106 - site now being brought forward by EBC	1800+	On site EY provision to be confirmed
	North Bishopstoke / Fair Oak	Considered within the Local Plan now submitted to inspector. Examination in Autumn 2019	5000	On site EY provision to be confirmed
Fareham	Fareham	Numerous allocations within local plan	Up to 3500 additional homes but plan is out for consultation	In discussion
	Portchester	Land at Down end road	Up to 700 homes	Review of need with local supply required
	Welborne	Pending Approval – application re-submission expected early autumn	Up to 6000	Early years nurseries and pre-schools being finalised

District	Development	Planning Status	Total Number of Dwellings	Early Years
Hart	Hartland Park	Granted	1500	On site EY provision
	Pale Lane, Elvetham Heath	In appeal – SofS decision 6 Aug 2019	700	In discussion
	Murrell Green / Winchfield	Withdrawn from 2016-32 Local Plan now being considered as a separate proposal.	5000	On site EY provision to be confirmed
Havant	Land around Sinah Lane Hayling Island	Local Plan allocation	approx 700	In discussion with HBC - planners will need to allow for early years
	Land between Denvilles and Emsworth	Local Plan allocation	2100	New day nursery
New Forest	Fawley Power Station	Outline & Local Plan	1500	Site reserved for Nursery
	Land North of Totton	Local Plan allocation	900	Review of need with local supply required
	Land South of Bury Road, Marchwood	Local Plan allocation	850	Review of need with local supply required
Rushmoor	Aldershot Urban Expansion	On Site	3500	Under construction.

District	Development	Planning Status	Total Number of Dwellings	Early Years
Test Valley	East Anton	On Site	3500	Full Day Care delivered 2018
	Whitenap	Local Plan allocation	1300	Review of need with local supply required
Winchester	Barton Farm	On Site	4000	Provision made in Section 106 for full day care Nursery
	West of Waterloo (Berewood)	Granted	3218	Review of need with local supply required
	North Whiteley	Granted	3500	Provision of 2 x 100 place day nurseries and potential for additional pre-school provision in the community centres

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