



**Buckinghamshire
Council**

Buckinghamshire Council

**Childcare
Sufficiency Assessment (CSA)**

April 2019 to March 2020

Contents

Introduction	3
Map: Buckinghamshire Primary Planning Areas	4
Executive Summary	5
Number of providers	7
Place availability across age ranges	9
Quality of Childcare	18
SEND and Vulnerable Groups	21
Glossary	22
Appendix: Impact of Covid-19 on the Childcare Market and Sufficiency	23

Introduction

Buckinghamshire Council (BC) has a statutory duty under Section 6 of the Childcare Act 2006 to work in partnership with childcare providers to influence childcare provision, as far as reasonably practicable. BC has a duty to ensure that there is sufficient childcare for working parents, or parents who are studying or training for employment, for children aged 0 to 14 or up to 18 for children with a disability.

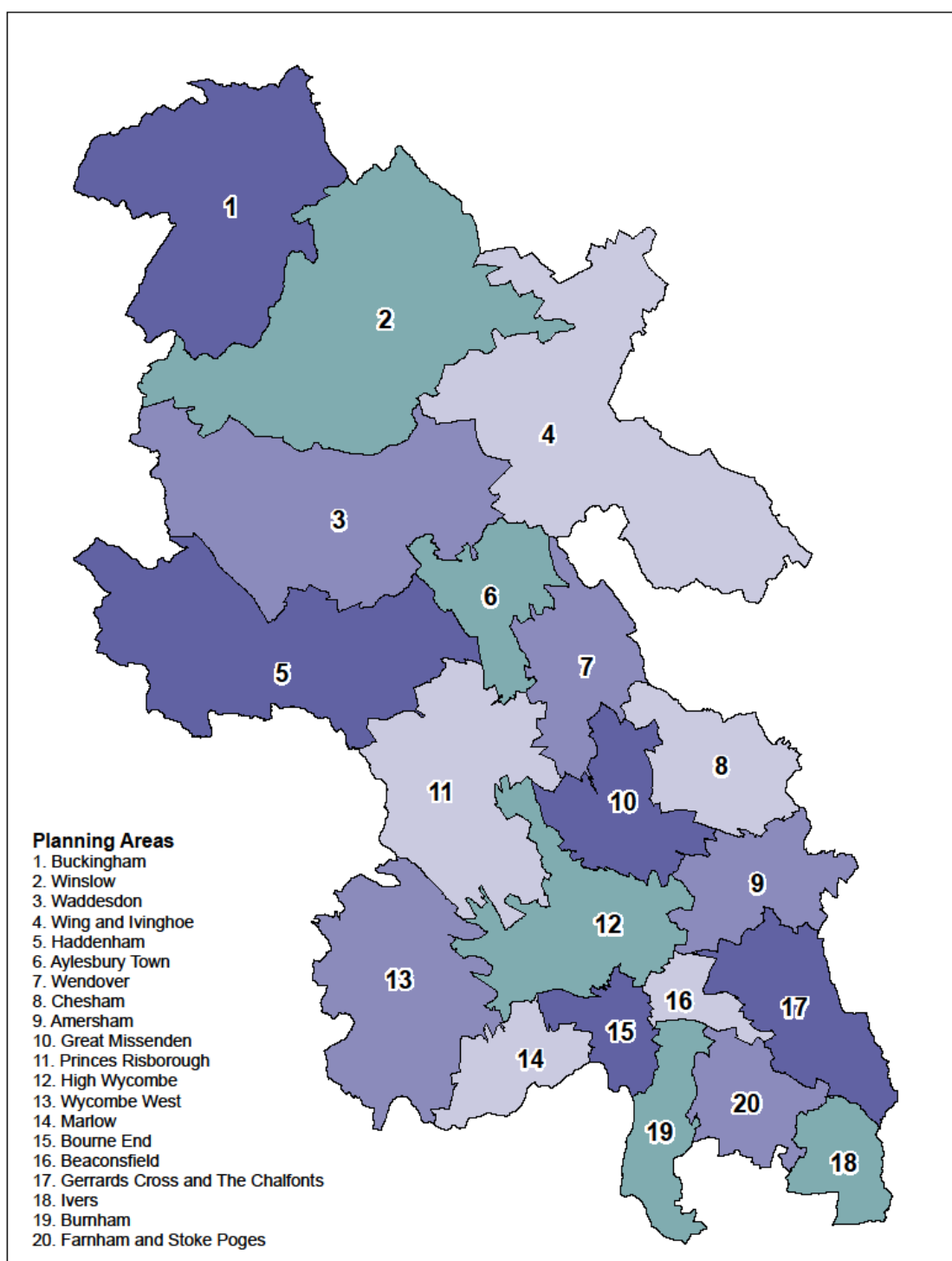
Local Authorities (LAs) are required to carry out an annual assessment of the sufficiency of childcare within their area to ensure they are meeting their statutory duty. The assessment is a measure of the need for, and supply of, childcare within each local area.

In carrying out this Childcare Sufficiency Assessment (CSA) LAs should assess:

- The state of the local childcare market, including the demand for specific types of providers in an identified locality, and the amount and type of supply that currently exists;
- The quality and capacity of childcare providers (including full day care, pre-school term time only provision, maintained nursery schools, schools with nursery classes and governor managed provision, independent schools and childminders);
- The state of the labour market;
- The impact of planned housing development; and
- The impact of changes in demographics.

This report presents the findings of our research and analysis.

Map: Buckinghamshire Primary Planning Areas



Executive Summary

This Childcare Sufficiency Assessment (CSA) summarises and analyses the local childcare market, in Buckinghamshire, however, in view of the impact of the Covid-19 pandemic on the childcare market any findings as at the 31st March 2020 are likely to change significantly over the coming year.

Key Highlights

In Buckinghamshire, we continue to meet parental demand for childcare and early education provision. Where parents report difficulties, brokerage support has been available to secure suitable childcare. Quality of provision is high with over 95% of both group and childminder provision judged as good or outstanding by Ofsted.

Take up of the extended free entitlement (EFE) to 30 hours has levelled out. There has been a slight increase in the number of children accessing EFE, but collectively less hours are being taken. Our analysis shows that the number accessing the universal free entitlement (UFE) has decreased, however, more children are taking their full 15 hours. The increase in 2 year old take up, whilst minimal, suggests that the potential squeeze on 2 year old places has not been as significant as our previous prediction.

Childcare Market:

- There are 27,593 childcare places available in Buckinghamshire which is a 3% increase on 2019.
- There has been a loss of 96 providers (across all sectors), greater than national statistics but the increase in places is higher than the national trend.
- There are sufficient out of school childcare places available to meet demand, with no reports of unmet demand received.

Funded Entitlement:

- There has been a development of 932 new places to deliver funded entitlement for 2, 3 & 4 year olds.
- The recorded data shows that there are a surplus of 1629 Funded Entitlement places for 3 & 4 year olds across the county.
- There has been a 1% increase in take up of 2 year funded entitlement (2FE) to 76%.

This is 7% above the national figure of 69%.

- There are an additional 20 childminders delivering the funded entitlements, a 7% increase on 2019.

Quality of Provision:

- Our data shows that the overall Ofsted judgement of the quality of provision on non-domestic premises (NDP) in Buckinghamshire is 97.7% good or better.
- The Ofsted judgement of the quality of provision on non-domestic premises for Buckinghamshire is higher than both statistical neighbours and nationally which are 97.2% and 97.3% respectively.
- The Ofsted judgement of quality of childminders has remained at 95.1% good or better.
- The Ofsted judgement of quality of childminders for Buckinghamshire is lower than both our statistical neighbours and nationally which are 96.7% and 95.4% respectively.

Identified priorities for Buckinghamshire Council:

- To maintain sufficiency of provision from within the existing provider base.
- To offer advice and financial planning to existing providers to adapt to the new marketplace.
- To provide advice to new providers to ensure timely completion of planned place development, which meets the needs of their community.
- To actively support new place development only where there is robust evidence of need.
- To continually monitor the availability and demand for early education places and childcare at a local level.
- To work with the Ministry of Defence (MOD) on their *Out of School Childcare Pilot* for eligible Military families.

Number of providers

Key points:

- Overall the data shows a 7% drop in the number of providers in Buckinghamshire.
- There has been a 3% increase in the number of places available which is higher than the national trend.
- The number of group based providers has increased by just over 8% with a 10% increase in the number of places available.
- The childminder numbers have reduced by 8%, and home based childcarers by 23%. This is higher than national figures which are -5% and +1% respectively.

Table 1: Total Childcare Places by sector

Childcare Type	31 March 2019		31 March 2020		Net comparison	
	No. of Providers	Maximum No. of places at any one time	No. of Providers	Maximum No. of places at any one time	Providers	Places
0 - 4 Year olds						
Day Nursery	95	5,504	103	6,072	8	568
Pre-School or Nursery School	140	4,121	142	4,200	2	79
Maintained Nursery School	2	356	3	446	1	90
School/Academy with Nursery Class	61	2,782	60	2,811	-1	29
School Managed Pre-School	21	755	23	721	2	-34
Childminder	573	3,395	526	3,180	-47	-215
Nursery Units of Independent Schools	17	882	17	882	0	0
Total 0 – 4 year olds	909	17,795	874	18,312	-35	517
Out of School - 5 Years +						
After School Club	110	4,131	130	4,615	20	484
Breakfast Club	51	2,163	50	2,022	-1	-141
Holiday Club	43	2,238	43	2,110	0	-128
Total Out of school - 5 Years +	204	8,532	223	8,747	19	215
Other						
SEND (specialist provision/places)	13	118	10	108	-3	-10
Home based Childcarer (Nannies)	353	353	272	272	-81	-81
Inactive Childminders	21	0	25	154	4	154
Total Other	387	471	307	534	-80	63
TOTAL	1,500	26,798	1,404	27,593	-96	795

We have a statutory duty to ensure sufficient childcare to meet the needs of working parents and those undertaking training to enable them to work, as far as is reasonably practicable. In practice, this means childcare needs to be available locally, but it might not be at a parent's first choice of provider.

The most significant change, over the last year, has been the continuing drop in the number of childminders by 8%, and home based childcarers (nannies) by 23%. This has contributed to a loss of 96 providers in total.

In our research to identify reasons for childminders leaving the sector they cite the following reasons:

- A change in their personal circumstances, so that home working is no longer a viable option.
- They have made the decision to take up employment in a setting based provision to further develop their career.
- They have returned to a previous career.
- Lack of demand due to parental preferences or saturation in the local marketplace.

To mitigate these losses in childminder registrations, we have generated additional provision within the remainder of the childcare sector with a 3% increase in available places. During the last year, an additional 932 places have been developed in the county, although closures and changes in operational numbers give a resulting overall net increase of 795. Most of the place increase demand has been in the full day care sector, suggesting that parents are making changes in their childcare choices as a result of the 30-hour offer. This figure is over and above the 280 places planned in the CSA 2019. It reflects the continual monitoring of the demand for additional provision considering population increases and changes in the demographic base of the county.

In Buckinghamshire, the reduction in the number of childminders and home based childcarers is higher than the national average, which for childminders is at 5% and for home based childcarers is at 1%. It is possible that the significant drop in home based childcarers is as a result of the Extended Free Entitlement (EFE) which gives parents an additional 15 hours of childcare per week (term time) and may have encouraged them to change their arrangements. Home based childcarers are not able to deliver the funded childcare offer, and therefore parents may no longer feel this form of childcare best supports their needs. This could also reflect changes in local demographics and the availability of suitable people to undertake this type of childcare.

The loss of places in the out of school sector reflects providers reducing their capacity to better reflect their anticipated take up. For example, a breakfast club had their number set assuming every child on roll attended every day, this has been reduced to reflect more accurately the potential demand.

Place availability across age ranges

Key points:

- Over 76% of eligible 2 year olds accessed a funded place in Buckinghamshire every term, whilst nationally the take up average is lower at 69%.
- Across Buckinghamshire we have sufficient 2 year old free entitlement (2FE) places to meet parental demand.
- We have sufficient universal free entitlement places (UFE) across Buckinghamshire and sufficient extended free entitlement (EFE) places in all but the Great Missenden planning area.
- We have sufficient out of school childcare to meet parental demand across Buckinghamshire.

Table 2: Total Early Education Funded Places

	3 & 4 year olds UFE		3&4 Year Olds EFE		2 Year Olds	
	2019	2020	2019	2020	2019	2020
Eligible Population	9,044	9,693	4,034	4,323	1,196	1,315
Places*	15,309	15,645	15,309	15,645	2,638	2,687
Surplus at County level	6,265	5,952	2,231**	1,629**	1,442	1,372

*Places for UFE and EFE are combined as it is the parent not the provider who determines whether they are accessed for UFE or EFE.

**Assumes UFE places have already been fully utilised.

Table 3: 2 year old Funded Entitlement - Take up in Buckinghamshire compared with national take up

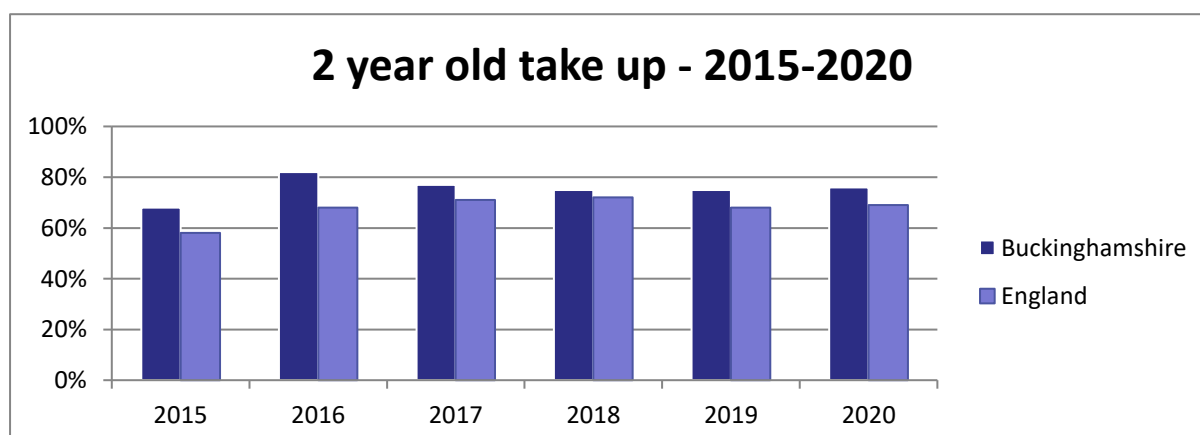


Table 4: 2 year old Funded Entitlement - Trend in take up in Buckinghamshire compared with national take up

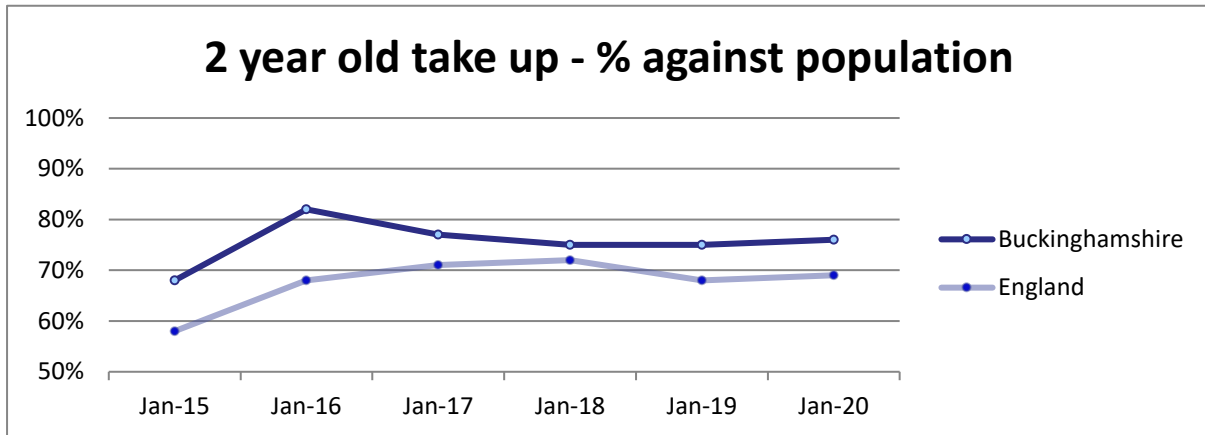


Table 5: Take up and gap analysis for 2 year old Funded Entitlement as at Spring 2020

Primary Planning Areas	Number of 2 Year Olds	Number of Funded places*	Variance	Average hours taken	% Children taking full 15 hours
Amersham	50	219	169	13.48	60.98%
Aylesbury Town	394	615	221	14.14	81.02%
Beaconsfield	19	75	56	13.83	76.47%
Bourne End	37	98	61	13.00	66.67%
Buckingham	45	81	36	12.29	57.14%
Burnham	38	67	29	14.03	69.23%
Chesham	70	111	41	13.98	72.50%
Farnham & Stoke Poges	14	65	51	13.20	43.48%
Gerrards Cross & The Chalfonts	60	98	38	13.76	71.43%
Great Missenden	17	9	-8	10.29	14.29%
Haddenham	16	67	51	13.19	66.67%
High Wycombe	362	607	245	14.06	77.24%
Ivers	35	71	36	14.44	85.19%
Marlow	26	96	70	14.69	86.67%
Princes Risborough	24	83	59	12.06	43.75%
Waddesdon	11	65	54	12.79	50.00%
Wendover	25	61	36	12.58	61.90%
Wing and Ivinghoe	31	83	52	12.74	65.00%
Winslow	21	73	52	12.16	47.62%
Wycombe West	20	43	23	13.78	80.00%
Buckinghamshire Total 2020	1315	2687	1372	13.22	63.86%
Comparison	44	44	0	0.03%	-10.37%
Buckinghamshire Total 2019	1266	2638	1372	13.19	74.23%

*The place number is based on the maximum number of children a provider can offer their full 15-hour entitlement to. However, in some instances a 2 year old place could be filled by a 3 or 4 year old.

In Buckinghamshire, as part of our Education and Skills Strategy, we prioritise supporting eligible families into a 2FE place as these children are more likely to under achieve. We have been able to maintain our take up at a minimum of 76% compared with 69% nationally.

From the gap analysis we have carried out, at county level there are enough 2FE places to meet the demand from eligible families. Great Missenden Primary Planning Area has an identified gap in provision (see table 5), however, the rural nature of this PPA means parents tend to travel outside of the area to access childcare provision closer to their work. The

additional places required would not be enough to support the development of further viable group provision, and the focus is therefore on the development of Childminders who can provide a service flexible enough to meet parental needs. It should be noted that within the larger urban planning areas, although there is no identified gap, there are 'hot spots' particularly where new housing developments are occupied prior to the supporting services coming online. Regular monitoring of the position to track changes in eligibility, demand and place availability is important so plans can be put in place, or adjusted, to reflect such changes. The Local Authority's strategy was adapted to develop additional places over and above those planned in the previous year's CSA, as a result of careful place monitoring.

Table 6: Universal Funded Entitlement take up in Buckinghamshire compared with national and regional

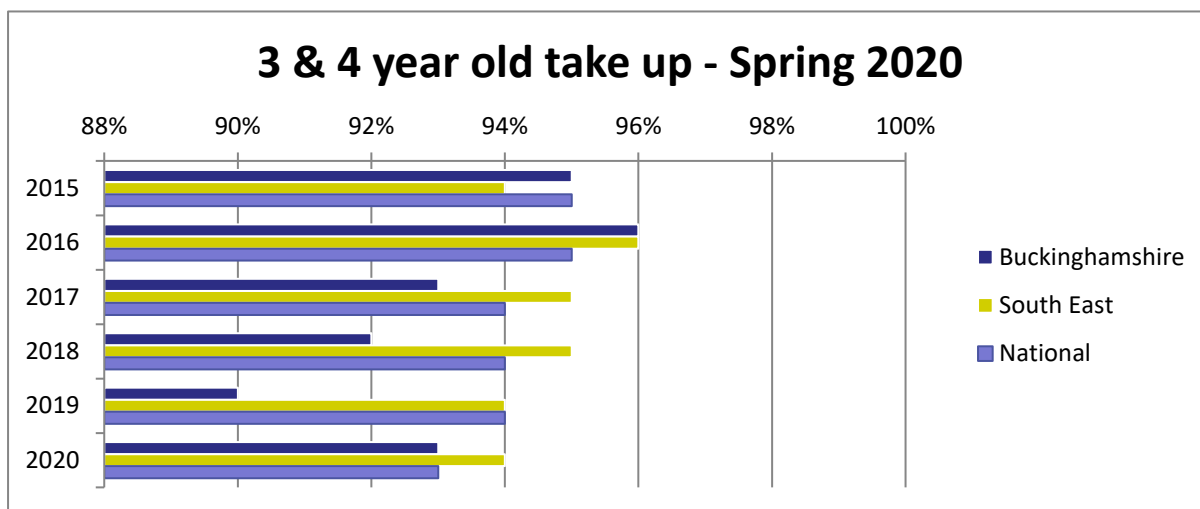
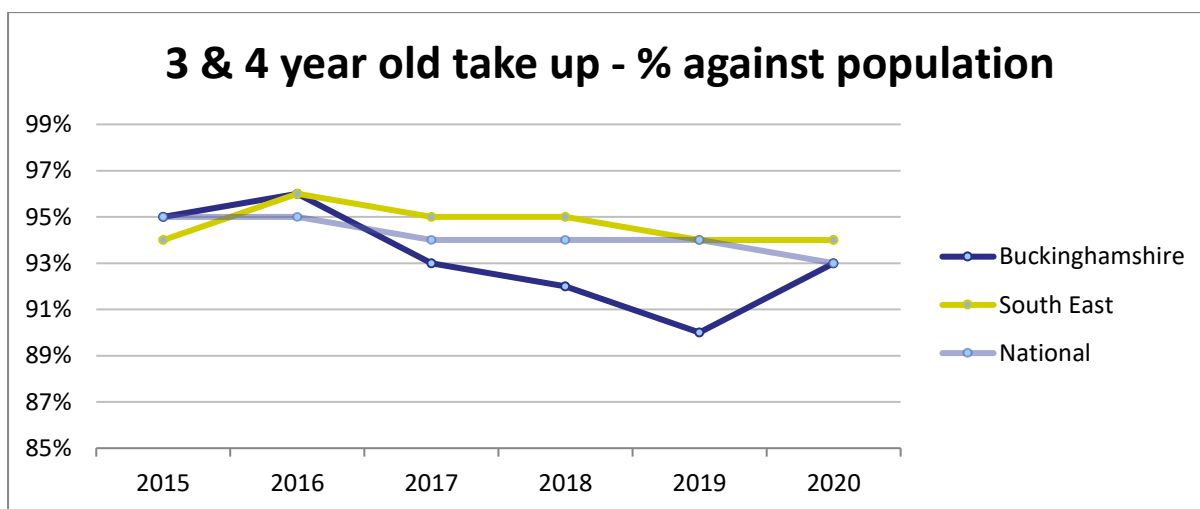


Table 7: Universal Funded Entitlement trend in take up in Buckinghamshire compared with national and regional



The DfE data is showing Buckinghamshire has a take up rate for UFE of 93% which is not replicated in tables 8. & 9. below but reflects the differing population data. The take up of UFE across Buckinghamshire now reflects the take up level nationally.

There is significant housing development across the county which is likely to attract new families. We know that when families move into a new area, they often leave their children at their previous setting which may be outside of their immediate area. This can distort how the data is reported. Families do not necessarily access their full 15 universal funded entitlement hours before taking up any additional hours under the extended funded entitlement. Families choices are likely to be based on their need for childcare and the options made available by their chosen provider or providers.

Table 8: Take up and gap analysis for Universal and Extended Funded Entitlements as at Spring Term 2020

Primary Planning Areas	3 & 4 year olds UFE	3 & 4 year olds EFE	TOTAL 3 & 4 year olds	Funded places available for both UFE and EFE*	Variance at PPA Area for EYE	Number of 3 & 4 year olds taking up universal hours	Number of 3 & 4 year olds taking up extended hours	Total number of 3 & 4 year olds taking up UFE/EFE
Amersham	563	251	814	897	83	493	178	671
Aylesbury Town	1889	844	2733	2,782	49	1,651	686	2,337
Beaconsfield	305	136	441	503	62	267	83	350
Bourne End	348	155	503	511	8	305	134	439
Buckingham	351	157	508	589	81	307	134	441
Burnham	236	105	341	444	103	207	101	308
Chesham	322	144	466	669	203	282	108	390
Farnham & Stoke Poges	276	123	399	458	59	242	112	354
Gerrards Cross & The Chalfonts	532	241	773	790	17	466	138	604
Great Missenden	223	99	322	292	-30	195	78	273
Haddenham	349	156	505	543	38	306	133	439
High Wycombe	1972	885	2857	3,080	223	1,726	628	2,354
Ivers	224	100	324	398	74	196	75	271
Marlow	365	163	528	721	193	320	118	438
Princes Risborough	297	120	417	504	87	260	115	375
Waddesdon	188	84	272	307	35	165	92	257
Wendover	323	144	467	576	109	283	149	432
Wing and Ivinghoe	388	173	561	631	70	340	133	473
Winslow	336	151	487	578	91	294	98	392
Wycombe West	206	92	298	372	74	180	64	244
Bucks Total 2020	9,693	4,323	14,016	15,645	1,629	8,485	3,357	11,842
Comparison	649	975	1624	336	-1,288	-226	156	-70
Bucks Total 2019	9,044	3,348	12,392	15,309	2,917	8,711	3,201	11,912

*The place number is based on the maximum number of children a provider can offer their full 15-hour UFE or EFE place to. However, in some instances a place could be filled by a 3 or 4 year old accessing paid for childcare.

Table 9: Average hours and percentage taking full entitlement for Universal and Extended Funded Entitlement 2020

Primary Planning Areas	Average UFE hours taken 2020	Average EFE hours taken 2020	%children taking full hours UFE 2020	%children taking full hours EFE 2020
Amersham	14.18	12.46	84.38%	69.66%
Aylesbury Town	14.45	12.65	89.70%	68.08%
Beaconsfield	14.12	13.38	86.14%	77.11%
Bourne End	14.10	11.95	84.59%	58.21%
Buckingham	14.11	11.12	85.99%	46.27%
Burnham	14.53	13.24	93.24%	73.27%
Chesham	14.40	12.94	84.75%	68.52%
Farnham & Stoke Poges	14.41	13.06	89.26%	64.29%
Gerrards Cross & The Chalfonts	14.32	12.29	86.48%	62.32%
Great Missenden	14.12	11.96	86.15%	56.41%
Haddenham	14.03	11.14	81.37%	50.38%
High Wycombe	14.46	12.62	89.75%	67.52%
Ivers	14.80	13.96	95.92%	88.00%
Marlow	14.31	12.61	84.38%	66.10%
Princes Risborough	13.86	11.53	78.46%	53.04%
Waddesdon	13.91	11.38	78.18%	42.39%
Wendover	14.32	11.47	86.22%	53.02%
Wing and Ivinghoe	13.80	11.47	76.47%	55.64%
Winslow	12.90	10.32	65.65%	39.80%
Wycombe West	14.23	14.01	85.56%	79.69%
TOTAL	14.26	12.33	86.13%	63.24%
Change in 2020 from 2019	3.05%	-0.96%	2.00%	-3.64%

Although the surplus places for UFE and EFE at county level has decreased we still have sufficient places across Buckinghamshire despite the increase in population. At primary planning area (PPA) level there is only one area which has an identified gap for 2FE, this is Great Missenden, however, there are sufficient places for those who want their UFE. As there is no full day care nursery in the area it is likely that parents are travelling to access this type of provision. We can see that families are taking up places in 8 other PPAs, as far away as Haddenham, Gerrards Cross and the Chalfonts. This suggests they are accessing provision close to their place of work or transport links as this is likely to reduce the hours of care needed and enable them to get there quickly in the case of an emergency.

Whilst in Buckinghamshire we have in excess of 10% capacity across the county, there are 3 PPAs where there is less than 5% surplus. This means there will continue to be competition for places in certain areas and for popular providers. Despite having identified plans to develop additional places in local areas of need, the impact of Covid-19 means that some planned developments have been delayed and rescheduled to January 2021. There is also evidence that some providers will close as a result of changes in demographics and parental preferences in the type of childcare they wish to use. We have robust systems in place to monitor the situation, and plan to concentrate available resources on retaining

existing high quality provision, developing new provision only where there is robust evidence of need.

Table 10: Childcare for older children

Primary Planning Areas	After School Clubs			Breakfast Clubs			Holiday Clubs			Childminders		
	Number in operation	Number with vacancies	% with capacity	Number in operation	Number with vacancies	% with capacity	Number in operation	Number with vacancies	% with capacity	Number in operation who offer	Number with vacancies	% with capacity
Amersham	7	2	29%	8	3	38%	5	5	100%	19	9	47%
Aylesbury Town	19	10	53%	22	8	36%	7	7	100%	69	45	65%
Beaconsfield	4	3	75%	4	4	100%	3	3	100%	4	3	75%
Bourne End	4	1	25%	5	3	60%	3	1	33%	26	10	38%
Buckingham	8	6	75%	8	7	88%	7	6	86%	8	4	50%
Burnham	3	2	67%	2	1	50%	2	2	100%	11	5	45%
Chesham	5	2	40%	5	1	20%	1	1	100%	20	14	70%
Farnham & Stoke Poges	6	4	67%	4	2	50%	3	3	100%	8	2	25%
Gerrards Cross & The Chalfonts	9	8	89%	10	7	70%	8	7	88%	29	18	62%
Great Missenden	3		0%	4	1	25%	2	2	100%	14	11	79%
Haddenham	7	2	29%	7	3	43%	2		0%	13	11	85%
High Wycombe	16	7	44%	22	8	36%	13	9	69%	61	40	66%
Ivers	3	1	33%	5	1	20%	1		0%	2	2	100%
Marlow	5	4	80%	6	2	33%	4	2	50%	5	2	40%
Princes Risborough	6	4	67%	5	4	80%	5	4	80%	13	5	38%
Waddesdon	4	2	50%	6	2	33%	1	1	100%	6	3	50%
Wendover	4	1	25%	5	3	60%	3	2	67%	17	13	76%
Wing and Ivinghoe	6	3	50%	9	5	56%	2	1	50%	17	11	65%
Winslow	6	3	50%	11	4	36%	4	3	75%	9	5	56%
Wycombe West	5	2	40%	6	1	17%	3	2	67%	13	5	38%
Bucks Total 2020	130	67	52%	154	70	45%	79	61	77%	364	218	60%
Bucks Total 2019	146	54	37%	169	62	37%	79	48	61%	309	48	16%

Availability of childcare for school aged children has increased across all types over the last year. This is likely to be because of more accurate reporting of vacancies during the annual audit as place numbers over all have diminished as demonstrated in Table 1. Where there is no capacity indicated in Table 10, this is because the provider did not complete the audit or did not complete the places information.

Whilst it may appear that we are able to meet demand for out of school care as at March 2020 we need to be mindful of two factors:

The impact of Covid-19

- Since the national lockdown to prevent the transmission of Covid – 19 on 23rd March 2020, restrictions have been in place for out of school provision, which may affect their ongoing viability.

Ministry of Defence (MOD) Pilot scheme

- Buckinghamshire has been chosen to be the first Local Authority to pilot a scheme for eligible military families to access free out of school childcare during term time.
- Although many of these families will already be using out of school childcare others may take up the opportunity or increase their hours as a result of this scheme.
- This may in turn put pressure on those providers in the vicinity of the Military Bases. We are working closely with the MOD and our local providers to ensure we have the capacity to meet demand.

Quality of Childcare

Key Points:

- In Buckinghamshire, 97.7% of non-domestic provision (NDP) registered with Ofsted is either good or outstanding. This is higher than our statistical neighbours (97.2%), and nationally (97.3%).
- 95.1% of childminders in Buckinghamshire have been judged to be good or outstanding. This is slightly lower than our statistical neighbours (96.7%) and the national figure (95.4%).

Table 11: Ofsted published results for Providers on non-domestic premises (NDP)

ALL NDP PROVIDERS WITH JUDGEMENTS AS AT 31st March 2020	Total number of providers	Number of providers with a judgement	Outstanding		Good		Requires Improvement		Inadequate		% Good or Better
			Number	%	Number	%	Number	%	Number	%	
Buckinghamshire	331	218	42	19.3%	171	78.4%	3	1.4%	2	0.9%	97.7%
National	23,927	16,807	3,881	23.1%	12,467	74.2%	312	1.9%	147	0.9%	97.3%
SE Statistical Neighbours	3,256	2,112	547	25.9%	1,505	71.3%	41	1.9%	19	0.9%	97.2%

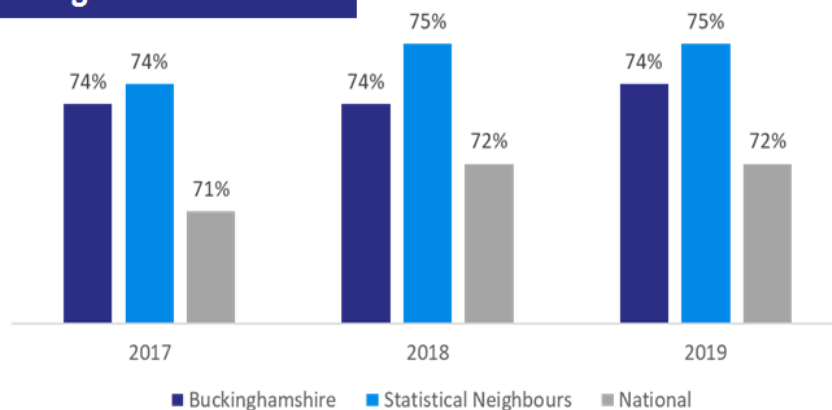
Table 12: Ofsted published results for Childminders

ALL CHILDMINDERS WITH JUDGEMENTS AS AT 31st March 2020	Total number of providers	Number of providers with a judgement	Outstanding		Good		Requires Improvement		Inadequate		% Good or Better
			Number	%	Number	%	Number	%	Number	%	
Buckinghamshire	536	405	65	16.0%	320	79.0%	18	4.4%	2	0.5%	95.1%
National	35,559	28,522	4,736	16.6%	22,486	78.8%	1,047	3.7%	253	0.9%	95.4%
SE Statistical Neighbours	5,638	4,552	961	21.1%	3,441	75.6%	110	2.4%	40	0.9%	96.7%

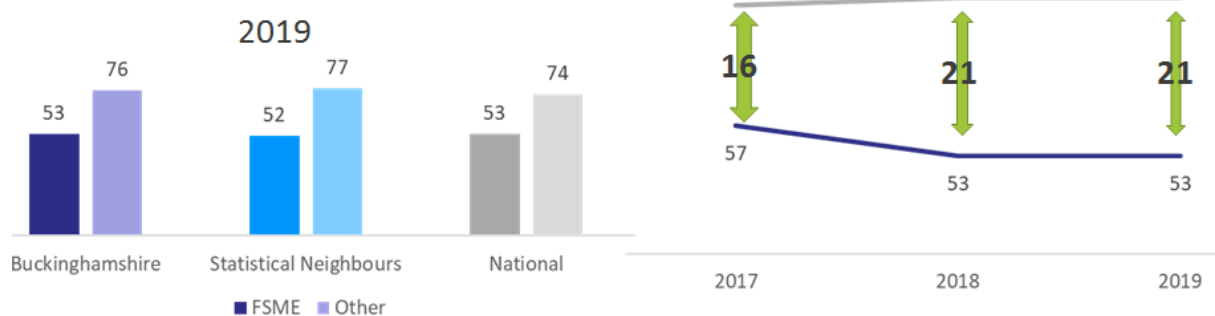
Table 13: % of pupils reaching a good level of development

% of pupils achieving a good level of development

Overall trend against benchmarks



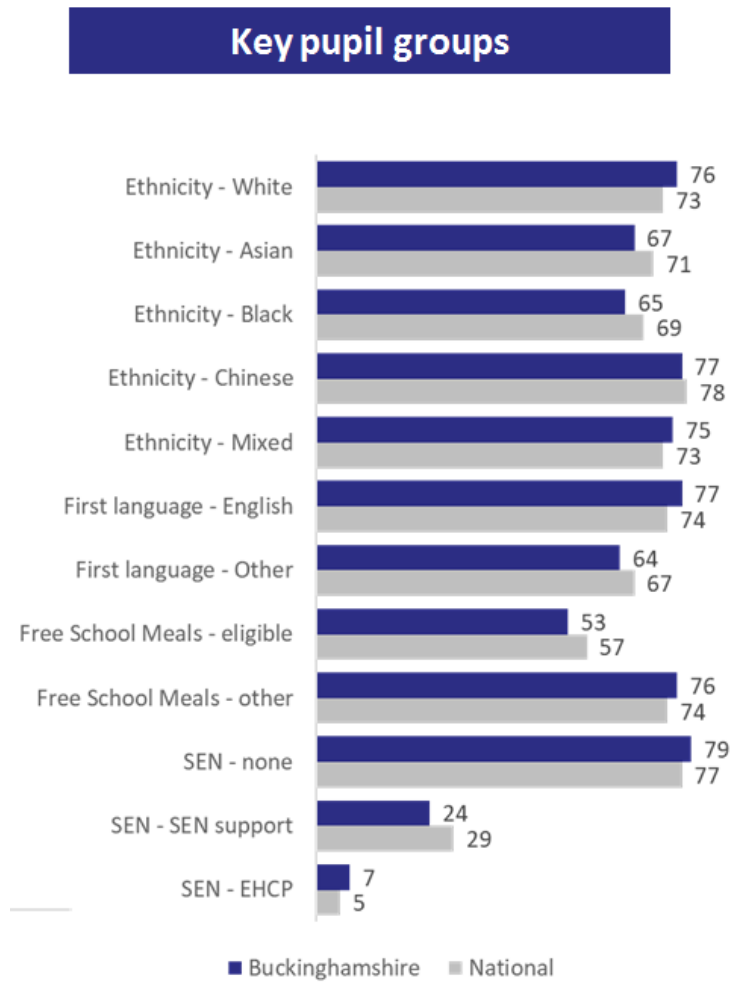
Attainment gap



Outcomes for Early Years Children

Having sufficient good quality early years childcare in Buckinghamshire has a strong positive impact upon outcomes for young children. Early Years Foundation Stage (EYFS) data suggests that children in Buckinghamshire do better than the national average against the key Good Level of Development (GLD) measure. Closing the attainment gap for children in Buckinghamshire remains a high priority. Training secured by the Early Years Service for the sector, and provided at a subsidised cost to Buckinghamshire providers, has a strong focus on meeting the needs of vulnerable children. Bursaries are available to support childcare practitioners to undertake further relevant qualifications as research has proven that for children aged 3 and above the qualifications of the workforce impact to a high degree on children's future outcomes.

Table 14: % of pupils reaching a good level of development in key pupil groups



SEND and Vulnerable Groups

Key points:

- In Buckinghamshire, there has been a 3.7% increase in the number of early years children with SEN support in early years provision.
- There has been a 57% decrease in the number of children with Education Health and Care Plan (EHCP) in early years settings.

Table 15: Number of early years children without EHCP supported (excluding those in Special Schools)

Type of provider	No. of children with SEN Support					
	2015	2016	2017	2018	2019	2020
Schools and Pre-Schools	268	244	271	290	283	342
Day Nursery	98	93	139	144	144	120
Funded Childminder	14	10	18	14	27	4
Nursery Unit of Independent School	53	14	16	0	0	5
Total	433	361	444	448	454	471

Table 16: Number of early years children with EHCP (excluding those in Special Schools)

Type of provider	No. of children with EHC Plan					
	2015	2016	2017	2018	2019	2020
Schools and Pre-Schools	115	78	54	42	91	51
Day Nursery	35	20	34	22	23	20
Funded Childminder	19	0	13	6	12	1
Nursery Unit of Independent School	2	1	4	0	0	0
Total	171	99	105	70	126	72

The Early Years Service provides advice and support to Early Years providers who identify children with significant needs. There has been a small increase of 3.7% in the number of children with SEN support however a significant decrease in the number with EHCP.

The significant majority of children's identified needs are communication & interaction, of which a significant percentage have a diagnosis of Autism Spectrum Disorder.

Glossary

BC	Buckinghamshire Council
CIN	Child in Need
CLA	Children Looked After
CP	Child Protection
CSA	Childcare Sufficiency Assessment
DfE	Department for Education
DLA	Disability Living Allowance
DWP	Department for Work and Pensions
EEF	Early Education Funding
EFE	Extended Funding Entitlement
EHCP	Education Health and Care Plan
FE	Funded Entitlement
LA	Local Authority
MOD	Ministry of Defence
NDP	Non-Domestic Premises
PPA	Primary Planning Area
PVI	Private, Voluntary and Independent
SEND	Special Education Needs and Disability
SN	Statistical Neighbour
UFE	Universal Funded Entitlement
2FE	2 Year Old Funded Entitlement

Appendix: Impact of Covid-19 on the Childcare Market and Sufficiency

Whilst this report relates to the year ending March 2020 the national lockdown, initiated on 23rd March 2020, which was as a result of the worldwide Covid-19 pandemic will impact on the childcare sector. Unless a provider was caring for children of keyworkers or children identified as vulnerable (according to the national definition) they were forced to close. This is an evolving picture and it is likely that the impact on both the childcare market, individual providers and families, in Buckinghamshire, will continue into 2020-2021.

Impact on Providers

- **Premises** – Providers will need to consider their operating model to ensure compliance with Public Health England guidance. Capacity may need to be reduced to ensure risks are minimized. Where providers operate in shared accommodation the needs of the various users will need to be assessed. Collection and drop off arrangements may need to be changed and operational hours amended to reduce the socialisation between different groups.
- **Staffing** – Providers may have staffing shortages due to sickness of staff members or their families. There will be those who are required to shield, as advised by Public Health England, or are identified as being in a vulnerable group. The impact on staff members families may require them to consider alternative employment due to need to increase hours of work or income. They may also have lost their own support networks which they might otherwise have relied on for childcare or carer's support. Staff may be reluctant to return to work due their own concerns about any potential risk or changes in working practices and responsibilities.
- **Financial considerations** – Providers are likely to have had reduced earnings over the period of lockdown even if they have remained open to support Keyworker families. There is likely to be a fall in demand due to the numbers of people now working from home. The need for personal protective equipment and increased hygiene requirements are likely to have increased expenditure alongside changes which may be needed to the environment, such as removal of carpets and soft furnishings. There are likely to be changes in demand necessitating new funding offers and potential loss of childcare revenue. Providers may experience competition from other providers which may not have existed previously.
- **Changes to demand** – There is likely to be a reduction in demand for childcare overall or for a specific type of childcare depending on changes in family circumstances or parental concerns about their children returning to the setting. There may be increased demand for some types of childcare, such as childminders, where parents wish to minimise the number of people their child socializes with. Changes in family circumstances may require different patterns of take up or affect eligibility for 2FE or EFE.
- **Local demographics** – How the lockdown impacts will vary between areas. Changes in employment, closure of key employers or changes to shift patterns may affect demand for childcare. The prevalence of Covid-19 in an area and risk of local lockdown may affect the local populations activities.

Impact on Families

- **Employment and economic factors** – Families will be impacted differently but may risk redundancy, extended furlough, contractual changes necessitating amended hours or working patterns, all of which may change their need for or type of childcare. Some people may be forced back into employment and need childcare where they haven't done previously. For many there will be a potential change in their level of income which in turn will affect their eligibility for 2-year-old (2FE) or extended funded entitlements (EFE). This may necessitate a change to their childcare arrangements.
- **Anxiety** – Parents may have concerns regarding direct risks to their children and the associated impact on their wider family due to increased vulnerability within the family unit. Parents need to feel confident in the measures implemented by their provider to reduce the risk of transmission. Parents need to be clear about the guidance so that they can be reassured that they are following the latest guidance or to hold their provider to account if necessary.
- **Change in childcare preferences** – Parents may opt to change from using multiple providers to one, be it a group setting or childminder.

Impact on Market Management

- **Closures** – Unexpected setting closures due to financial concerns are likely to impact on market management. Where there is sufficient alternative provision this may be managed but where not may require a rapid response to ensure demand is met. A setting may close temporarily or permanently due to lack of qualified staff. Supporting with staff recruitment may help in the short term. Clear career training pathways and bursaries to support them, subject to available resources, may help staffing availability in the longer term.
- **Reduced capacity** – Providers may reduce capacity due to changes made to minimise transmission risks and/or staff availability, this may mean that demand exceeds supply in an area.
- **Funding entitlement (FE) offers** – Providers may choose to reduce FE places to maximise income from paid for childcare conversely others may consider increasing FE places to maximise occupancy.
- **Demand** – There is risk that demand for all types of early education and childcare will decrease due to changes in family circumstances or concerns about the ongoing risk of Covid-19. There could be an increased demand for 2FE places as unemployment rises or incomes are reduced, reduced demand for EFE.
- **Changes in patterns of take up** – Parents may need to change their childcare arrangements either hours per day or days per week, term time to stretched across the year to reflect potential changes in working patterns. There may be a shift from group-based provision to childminders as parents chose this option to minimize the social interactions their children are exposed to.
- **Changes needed to promote funding offers** – The LA will need to consider alternative promotional activities for those that have been curtailed due to health and safety concerns or national and local guidance.

From analysing the issues highlighted above the priority for Buckinghamshire Council is:

- To maintain sufficiency of provision from within existing provider base rather than developing additional provision which may affect established providers viability;
- To provide advice and financial planning to existing providers to support them to adapt to the new marketplace;
- To provide advice and business support to ensure successful completion of planned place development;
- To actively support new place development only where there is robust evidence of need; and
- To continually monitor the availability of and demand for early education places and childcare at a local level.