

**Herefordshire Council**

**Childcare Sufficiency Assessment**

**Final Report**

**September 2023**

**hempsall's**

Your partner to achieve change and opportunities for children and families

## Contents

<b>1</b>	<b>Introduction</b> .....	4
1.1	Herefordshire Council’s Childcare Sufficiency Assessment .....	6
<b>2</b>	<b>Background</b> .....	6
<b>3</b>	<b>Key findings and recommendations</b> .....	8
3.1	Key findings .....	8
3.1.1	Market capacity .....	8
3.1.2	Childcare ratios .....	9
3.1.3	Take-up of the early years entitlements .....	9
3.1.4	Funding to support children with Special Education Needs and Disabilities (SEND)....	10
3.1.5	Child population and new homes developments .....	10
3.1.6	The economy in Herefordshire .....	11
3.1.7	Findings from the provider audit .....	12
3.2	Herefordshire childcare sufficiency assessment – recommended actions.....	16
<b>4</b>	<b>Herefordshire in context</b> .....	19
4.1	Population.....	19
4.2	New housing .....	20
4.3	The economy in Herefordshire .....	21
4.4	Index of Multiple Deprivation (IMD) 2019.....	25
<b>5</b>	<b>The early years and childcare market in Herefordshire</b> .....	27
5.1	Age ranges.....	28
5.2	Availability of childcare .....	28
5.3	Cost of childcare.....	30
5.4	Quality of provision.....	31
5.5	Distribution of early years and childcare provision .....	31
5.6	Holiday Activities and Food Programme (HAF).....	32
<b>6</b>	<b>Take-up of the early years entitlements in Herefordshire</b> .....	34
6.1	Special Education Needs Inclusion Fund and the Disability Access Fund .....	35
<b>7</b>	<b>Herefordshire provider audit</b> .....	38
7.1	Operating capacity compared to registered capacity.....	39
7.2	Changes in demand.....	40
7.3	Attendance rates for children with SEND .....	45

7.4	Unmet demand .....	46
7.5	Responding to COVID-19.....	47
7.6	Finances .....	48
7.7	Staffing .....	53
7.8	Support for childcare settings during the COVID-19 pandemic and beyond.....	57
7.9	Any final comments .....	60
<b>Appendices .....</b>		<b>61</b>

## 1 Introduction

The Childcare Act (2006) requires local authorities in England to ensure there is sufficient childcare for children (aged 0 to 17 years old) of working parents, parents studying or training, and for disabled children within their local area. Local authorities have a duty to produce an annual assessment of sufficiency under Section 6 of the Act. The annual sufficiency report should focus upon the availability and sufficiency of childcare in the area. This information should be made available to parents and elected members.

To meet section 6 duties local authorities need to collect and publish information on the supply of provision and demand for childcare in their area. Statutory guidance provides clear indication of what must be included in the annual review, and what should be included.

Section 7 of the Act requires local authorities to secure sufficient early years provision free of charge for eligible children aged two, three and four years of age. Two-year-old children whose families meet the relevant eligibility criteria are legally entitled to 15 hours a week free early years provision. All three- and four-year-olds are entitled to 15 hours a week free early years provision (the universal entitlement) with those whose parents meet the eligibility criteria entitled to an additional 15 hours a week (the extended entitlement).

As a result of the COVID-19 pandemic, childcare sufficiency assessment needs to be considered from a new perspective and context, as supply, need and demand has experienced significant shifts and changes.

Whilst the impact of COVID-19 on the childcare market may now be stabilising (for example, a gradual return for many working parents into the office rather than working from home), the current economic situation and increases to the national living and national minimum wage, have resulted in increased costs of delivery of services which may result in increased childcare fees and/or parents seeking to reduce costs. These factors, among others, are impacting on demand and supply, and change is set to continue.

In the Spring 2023 Budget, the Government announced a package of increased childcare support. This includes:

- Working parents will be able to access 30 hours of free childcare per week, for 38 weeks of the year, from when their child is 9 months old to when they start school. This will be rolled out in stages, starting in April 2024.
- An uplift to the hourly rate paid to providers to deliver the existing free early years offers. An additional £204m of funding will be provided in 2023/2024, increasing to £288m by 2024/2025. This is in addition to the £4.1 billion the Government will provide by 2027/2028 to facilitate the expansion of the new free hours.
- A change to staff: child ratios for 2-year-olds, moving from 1:4 to 1:5 from September 2023
- Start-up grants for new childminders, including for those who choose to register with a childminder agency. Childminders who register with Ofsted will receive a start-up grant of £600, whereas those who register with a childminder agency will receive £1,200.
- The government will give local authorities in England £289 million over two academic years, starting in September 2024, to set up wraparound childcare provision in schools.
- Paying parents on Universal Credit childcare support up-front when they are moving into work or increasing their hours, rather than in arrears meaning low-income families will find it easier to afford and it will help remove a barrier that many face when thinking about going back to work.
- Increasing Universal Credit childcare costs: an increase of the Universal Credit childcare cap to £951 for one child (up from £646) and £1,630 for two children (up from £1,108).

These policies will provide local authorities, and early years and childcare providers, opportunities and challenges, which will be realised within the current market, which is facing challenges relating to shifting patterns of supply and demand, and financial sustainability concerns for many childcare providers.

## 1.1 Herefordshire Council's Childcare Sufficiency Assessment

Herefordshire Council commissioned Hemsall's in October 2022 to work with the LA to undertake a Childcare Sufficiency Assessment.

### Key elements

The assessment undertaken by Hemsall's contained the following elements:

- Desk research – to establish populations and trends and the local economy to provide a context for the Childcare Sufficiency Assessment.
- An assessment of the supply of early years and childcare provision across the county, to provide an overview of capacity and type of provision to act as a baseline for future supply trend analysis (spring term 2023).
- An audit of all registered early years and childcare providers undertaken February/March 2023.
- Analysis of take-up of the early years entitlements to establish trends and take-up patterns (as at January 2022 – latest data).
- Take-up of the Disability Access Fund and use of the Early Years Send Inclusion Fund (SENIF).

## 2 Background

Sufficiency of supply of childcare has not been an issue nationally in recent years, as demand for childcare decreased from the start of the national COVID-19 lockdown in March 2020. Demand remained lower than previous levels (year-on-year) throughout the remainder of the year and into spring term 2021. The short-term impact of COVID-19 was to provide access to childcare to only relatively small numbers of children (vulnerable and key worker children) between 23 March and 1 June 2020. After which, settings in England were encouraged to re-open their doors to all children. Demand for childcare did not recover to pre COVID-19 levels from 1 June 2020 and remained depressed into autumn 2020 and in 2021.

Take-up of the early years entitlements has returned to pre-COVID-19 levels; however, the Government funding rate has remained static in an environment of increased delivery costs, and demand for paid-for childcare may have decreased either as a result of changes in

working patterns, or as a result of cost-of-living increases in 2022-2023. The Office for National Statistics reported an annual inflation rate rising from 8.8% in January 2023 to 9.2% in February 2023, reflecting highs previously seen around 30 years ago<sup>1</sup>.

Recruitment and retention of staff in the early years and childcare sector have been identified as issues pre-COVID-19 nationally, and may have been exacerbated by the COVID-19 pandemic (for example, the Social Mobility Commission<sup>2</sup>). In December 2021 the Early Years Alliance published a report on the impact of recruitment and retention challenges on the early years sector in England<sup>3</sup>. Key findings in the report included a very high proportion of survey respondents reporting they were finding it difficult to recruit suitable new early years staff and common challenges in retaining staff across the sector. The Herefordshire Early Years and Childcare Service have identified recruitment and retention as a significant issue in the county.

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<sup>1</sup> [Cost of living latest insights - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/cost-of-living/latest-insights)

<sup>2</sup> Social Mobility Commission 'The stability of the early years workforce in England: an examination of national, regional and organisational barriers', August 2020  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/906906/The\\_stability\\_of\\_the\\_early\\_years\\_workforce\\_in\\_England.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/906906/The_stability_of_the_early_years_workforce_in_England.pdf)

<sup>3</sup> Early Years Alliance 'Breaking Point: The impact of recruitment and retention challenges on the early years sector in England', December 2021  
[https://www.eyalliance.org.uk/sites/default/files/breaking\\_point\\_early\\_years\\_alliance\\_2\\_december\\_2021.pdf](https://www.eyalliance.org.uk/sites/default/files/breaking_point_early_years_alliance_2_december_2021.pdf)

### 3 Key findings and recommendations

The early years and childcare market is facing a number of challenges and opportunities nationally. Some of these challenges reflect the impact of COVID-19 on demand for childcare, compounded by the current economic climate of rising costs, potentially affecting parents' ability to pay for childcare, and childcare providers operating costs. The announcement in the Spring 2023 Budget of a phased expansion of the funded early years entitlements and development of wrap-around care in schools offers opportunities for growth in the sector. Expansion requires investment. The Government has announced a significant investment, including start-up grants for new childminders, funding to set up wrap-around childcare, and an uplift in the early years funding rate, which has remained static for a number of years. Nationally, recruitment and retention to the sector is a concern. A lack of qualified and experienced staff can impact on settings potential to operate to their full capacity, and can result in settings re-thinking offering places that are more expensive to operate (for example, places for babies and the under-twos as a result of higher staff: child ratios). Childcare sufficiency in Herefordshire is impacted by these larger forces, and market management is constrained to a degree pending increased investment and a national strategy for workforce recruitment, development and retention.

#### 3.1 Key findings

##### 3.1.1 Market capacity

The number of registered childcare places has decreased from 191 in 2019 to 151 in January 2023. This has resulted in a loss of an estimated 519 registered childcare places.

The decrease in the number of settings is attributable to a marked decrease in the number of childminders (from 84 in 2019 to 48 in 2023) and fewer group settings. There has been an increase in the number of Governor-run provision in schools and in the number of academy nurseries.

The majority of settings offer early years and childcare provision for children aged 2, 3 and 4 years old. There are fewer baby places (for children aged 0-1 year 11 months) than



previously. Provision for school-aged children is difficult to quantify. There are a total of 26 settings registered with Ofsted to offer childcare provision for children aged 5 years old and over.

The national roll-out of the Government's Holiday Activities and Food (HAF) programme in 2020 provided funding to local authorities for free holiday places for eligible children during prescribed school holidays. HAF funding has supported Herefordshire to work with childcare settings during the Easter, summer and Christmas school holidays, offering provision to children and young people who may not have otherwise had access.

### 3.1.2 Childcare ratios

Childcare ratios provide an overview of relative childcare supply for children aged 0-8 years old. Across Herefordshire the average childcare ratio for children aged 0-4 years is an estimated 0.44, or roughly one place per two to three children in this age range.

Childcare ratios are highest in the wards of Widemarsh (1.56 or roughly one and a half places per child aged 0-4 years), Old Gore (1.38), Tupsley (1.37), Leominster South and Kerne Bride (both with a ratio of 1.12). In each of these wards there are more places than children in this age range. Excluding wards with no provision, childcare ratios are lowest in Holmer (0.03), College (0.11) Hampton (0.13) and Leominster North & Rural (0.14).

### 3.1.3 Take-up of the early years entitlements

The number of children accessing their funded early years entitlements decreased during the first COVID-19 lockdown, when childcare settings had to close their doors to all but vulnerable children and children of key workers, and subsequent lockdowns and localised restrictions impacted on demand for childcare across the country in 2020 and 2021.

Take-up of the funded early years entitlements has largely recovered nationally. Take-up of the two-year-old entitlement in Herefordshire increased from 2019 to 2022 by 23 percentage points (from 63% pre-pandemic to 86% in 2022). This growth far exceeds the national and regional picture (an average of 4 and 1 percentage points respectively), as does the take-up rate in Herefordshire. The percentage of three- and four-year-olds taking up the

universal funded entitlement for children in this age range in Herefordshire fell between 2020 and 2022, but remains in line with national averages.

### 3.1.4 Funding to support children with SEND

There are two key early years funding streams aimed at supporting access to the early years entitlements for children with additional needs and disabilities; the Special Educational Needs Inclusion Fund (SENIF) and the Disability Access Fund (DAF).

In Herefordshire, SENIF is awarded according to eligibility bands up to a maximum total of £1,045 per term.

Providers receive £828 of DAF per eligible child per year.

### 3.1.5 Child population and new homes developments

There are a number of key drivers underpinning childcare demand. Changes in the population is one such driver. Based on Office for National Statistics estimates (2018-based), the child population in Herefordshire is forecast to decrease by 1.3% between 2023 and 2026. The decrease is forecast in the 5–9-year-old population, with populations of 0–4-year-olds and 10–14-year-olds remaining stable.

Offset against this are plans for significant new homes developments across the county. Overall, Herefordshire requires around 17,000 new dwellings to meet its housing need. As at April 2021 there were planning permissions for 5,875 new homes. A number of options for how housing growth can be achieved to deliver an additional 11,200 dwellings are set out in the new Local Plan 2021-2041 consultation document, including rural area growth, single market town growth and combinations therein<sup>4</sup>.

The outcomes of consultations around new homes developments, and the planning permissions granted to date, will impact on childcare need and demand. Provision of

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<sup>4</sup> <https://www.herefordshire.gov.uk/downloads/file/23304/spatial-options-consultation-document-local-plan-2021-2041>

childcare needs to be considered alongside new homes developments, to ensure childcare needs can be met, and the local authority can deliver the statutory childcare sufficiency duties.

### 3.1.6 The economy in Herefordshire

Based on the 2021 Census, Herefordshire saw the West Midlands' third-largest percentage-point fall in the proportion of people aged 16 years and over (excluding full-time students) who were employed (from 58.3% in 2011 to 55.2% in 2021)<sup>5</sup>.

Working hours have changed, with 11.1% of residents aged 16 or over in employment, working 15 hours or less a week, compared to 10.5% in 2011. Just under 14% (13.7%) of people said they worked over 49 hours a week, compared to 16.6% in 2011.

Working hours may have been affected by the COVID-19 pandemic.

Just over a third of jobs in Herefordshire (34.2%) are part-time, compared to 32.1% in the West Midlands and 31.9% in GB.

Data suggests there were 12,000 Universal Credit claimants in Herefordshire in December 2022<sup>6</sup>, slightly below the peak of 12,390 seen in April 2021 and well above the 5,980 seen in March 2020. Wards with the highest number of Universal Credit (UC) claimants were Hinton & Hunderton, Newton Farm, Leominster East, Widemarsh and Red Hill. In August 2022, there were 9,828 households in Herefordshire claiming Universal Credit, and of these, just over a half (5,000) had at least one child.

Earnings by residence in 2021 showed gross weekly pay for full-time workers in Herefordshire was considerably lower than regional and national averages (nearly 9% lower than the West Midlands and just under 13% lower than the GB average).

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<sup>5</sup> <https://www.ons.gov.uk/visualisations/censusareachanges/E06000019/>

<sup>6</sup> <https://understanding.herefordshire.gov.uk/media/2103/cost-of-living-bulletin-issue-4-january-2023-v10.ppt>

In terms of relative deprivation, the most deprived areas (based on the Index of Multiple Deprivation 2019) are located in the south of Hereford city and in Leominster, Ross-on-Wye and Bromyard. Golden Post – Newton Farm in Hereford remains the most deprived area in the county and the only Lower Super Output Areas (LSOA) to be in the 10% most deprived nationally<sup>7</sup>.

### 3.1.7 Findings from the provider audit

An audit of all registered childcare providers (February/March 2023) aimed to get a more detailed picture of the early years and childcare market across the county, and to assess the impact on demand for early years and childcare following the COVID-19 pandemic and current economic climate, and to consider what support might be helpful. The audit achieved 100% response rate.

#### **Capacity**

Childcare settings, on average, have an operating capacity (the number of places actually used compared to Ofsted registration) of 90%, with different average operating capacities in different types of provision.

Based on audit responses there were a total of 521 vacancies in spring term 2023, 14% of operating capacity. It is likely there would be unmet demand pressures for provision in the summer term, for a number of reasons: the vacancies found in spring term may not meet parental need, or be in the geographical area, or type of provision required. In addition, the majority of school-based provision is term-time only, so overall capacity decreases in the summer.

In spring term 2023, nearly half of all providers (49%) reported demand that could not be met, and unmet demand was particularly high in childminding and day nursery provision.

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<sup>7</sup> Understand Herefordshire 'The Indices of Deprivation 2019 – Findings for Herefordshire <https://understanding.herefordshire.gov.uk/media/1900/iod2019-report-v10-final.pdf>

### **Changes in patterns of demand**

Audit responses identified demand levels had changed since the start of 2020 (the lifting of the COVID-19 restrictions), but that the impact was being felt differently. Over half of all settings reported demand had increased, with 22% reporting a decrease. Pre-schools were more likely to have experienced a decrease in demand (49% reporting this to be the case) and day nurseries more likely to have experienced an increase (68%).

A third of settings (34%) reported an increase in demand for baby places (0–1-year-olds), particularly evident in childminding and day nursery settings. Patterns of demand for the funded early years entitlements showed a mixed picture, with some settings experiencing an increase, and others, a decrease. Looking at the two-year-old entitlement, the trend for pre-schools is towards decreased demand and for schools, a trend towards increased demand.

For the universal entitlement for three-and four-year-olds, day nurseries were more likely to have experienced an increase in demand overall, with pre-schools showing a relatively equal split between increased and decreased demand. Overall, demand for 30-hours has increased, as 26% of respondents reported demand had increased and 13% reported a decrease. Within that, schools and pre-schools were more likely to report a decrease in demand for 30-hours.

Audit responses also identified parents demanding greater flexibility and changing their childcare plans regularly – reported by 22% of settings overall. There was also evidence of an increase in demand for wrap-around care (15% of settings overall).

Around one in five settings (22%) reported a change in demand for SEND provision since the start of the pandemic and 30% had experienced an increase in the attendance rate of children with SEND. Settings also reported an increase in the number of children presenting additional needs (56% overall), with increases predominantly around speech and language and social and emotional needs.

Whilst the provider audit identified changes in patterns of demand, over a third of providers reported they had not made any changes to their offer since 2020. Where changes had been made, the most common was to increase fees, and to change staffing arrangements.

### **Financial sustainability and resilience**

Half of all settings reported current income was insufficient to meet costs with 6% reporting income would exceed costs. Taking childminder respondents out of the equation, the percentage of settings reporting current income was insufficient to meet costs rose to 61%.

Just over a third of settings reported confidence in the short-term financial sustainability of the setting (6 to 12 months), with the overall percentage boosted by the number of childminders reporting confidence in their financial sustainability.

Underlying confidence in financial sustainability are concerns about levels of income (66% of all settings had this concern), cash flow (45% of settings), expenditure exceeding income (61%) and low levels of demand.

Four in ten respondents (41%) reported concern around high levels of demand (which could not be fulfilled).

On average (and based on settings providing a response) 44% of settings derive over 60% of their income from early years funding, with pre-school settings and schools having a higher reliance on this funding.

### **Workforce**

Recruitment and retention of suitably qualified and experienced staff is recognised as a national issue. In Herefordshire, the availability of applicants for posts was a concern for the majority of group settings (74%), as was the training level or experience of applicants (70%). Retention of staff was of lower levels of concern, albeit nearly a quarter (22%) of respondents identified this as an issue.

Access to, and costs of, training were reported as an issue by 35% and 49% of respondents respectively.

### 3.2 Herefordshire childcare sufficiency assessment – recommended actions

Sufficiency area	Recommendations
<p><b>Market capacity</b></p>	<ul style="list-style-type: none"> <li>• Work with planning to ensure increased demand for early years and childcare is recognised in areas where there are high number of new homes planned. Focus particularly in areas with a currently low childcare ratio. Additional provision may be required to meet increased demand for early years provision the Government introduced the extended early years entitlements and Wrap-around Childcare</li> <li>• In line with recent Government budget announcements (March 2023) to increase early years funding down to 9 months, continue to explore opportunities to expand provision, including in school-based settings, to include additional capital funding.</li> <li>• The Government is introducing new start-up grants for childminders. Work with Jobcentre Plus to promote opportunities to potential new childminders, particularly in rural areas and areas with a low childcare supply currently.</li> <li>• Share information from the CSA with providers and encourage providers to review their business models and demand patterns, signposting to business support and advice.</li> <li>• Continue to provide all settings with access to business planning tools that support financial planning (for example, National Day Nurseries Association [NDNA Early Years Business Zone: <a href="https://www.earlyyearsbusinesszone.org.uk/">https://www.earlyyearsbusinesszone.org.uk/</a>], Hempsall's Business Map [<a href="https://foundationyears.org.uk/2021/01/hempsalls-business-map-for-early-years-providers/">https://foundationyears.org.uk/2021/01/hempsalls-business-map-for-early-years-providers/</a>])</li> <li>• Ensure parents, carers and childcare providers can access information and support around childcare via a Family Information Service (FIS) which should be widely promoted to encourage parents looking for childcare to make contact.</li> <li>• Monitor parental enquiries to identify any patterns of unmet demand (for example, parents stating they cannot find childcare).</li> </ul>



Sufficiency area	Recommendations
	<p>Analyse data to identify any patterns of unmet demand in terms of type of childcare, age ranges and geographical location.</p>
<p><b>Workforce supply, recruitment and retention</b></p>	<ul style="list-style-type: none"> <li>• Work with Jobcentre Plus to promote childcare as a viable employment option.</li> <li>• Work with local training providers to identify suitable training opportunities and to ensure requisite skills are taught with greater promotion and awareness of what training and/or careers are available.</li> <li>• Work with childcare settings to explore the business benefits of adopting new childcare ratios to support increasing capacity from September 2023.</li> <li>• Monitor any Government/national workforce recruitment and retention strategies or initiatives to support early adoption locally.</li> </ul>
<p><b>Increase in demand for SEND provision</b></p>	<ul style="list-style-type: none"> <li>• Continue to monitor the need for additional support for children with SEND, both in settings and to access settings.</li> <li>• Continue to promote additional funding to support access to the early years (Special Educational Need Inclusion Fund and Disability Access Fund).</li> </ul>
<p><b>Childcare for school-aged children</b></p>	<ul style="list-style-type: none"> <li>• Work closely with the Holiday Activities and Food (HAF) programme team to establish a baseline of existing holiday provision.</li> <li>• Identify opportunities to ensure out of school providers are active partners in delivery, particularly to support an increase in wrap-around provision in schools.</li> <li>• Consider an audit of out of school (non-HAF) provision (non-Ofsted-registered, stand-alone and school-based) to understand capacity for older children and to identify opportunities to extend the reach of Government schemes to support parents to reduce the costs of childcare (Tax Free Childcare and the childcare element of Universal Credit).</li> </ul>

Sufficiency area	Recommendations
	<ul style="list-style-type: none"> <li>• Support the development of mixed delivery models – where settings offer HAF-funded places alongside fee-paid places for non-HAF-eligible families.</li> </ul>
<b>Financial sustainability and provider resilience</b>	<ul style="list-style-type: none"> <li>• Childcare providers would benefit from dedicated business planning support, both to maximise current capacity and income, as well as preparing for the expansion of the Government’s childcare offer.</li> <li>• Consider additional resource to deliver the planned expansion of the Government’s childcare offer. Local plans need to understand and map demand and impact, identifying where new or different provision is required. This will necessitate working with existing childcare providers to support them to adapt their offers and identifying where new provision may be required.</li> </ul>

## 4 Herefordshire in context

### 4.1 Population

The total population of Herefordshire was 187,100 as at the 2021 Census. This is an increase of around 2% since the 2011 Census. The population increased by a smaller percentage than the overall population of the West Midlands (6.2%) and the overall population of England (6.6% increase). Source: Office for National Statistics Census area changes.

In 2021, 96.9% of Herefordshire's residents identified their ethnic group within the 'White' category, compared to 98.2 in 2011.

#### **Child population (0-14 years)**

The 2021 Census recorded a total of 28,000 children aged 0-14 years old usually resident in Herefordshire.

Population estimates at a lower (than county-wide) geography were not available at the time of this report, so ward-level data and projected population data are based on different datasets.

Based on Office for National Statistics (ONS) population estimates mid-2021, there are a total of 27,960 children aged 0 to 14 years living in Herefordshire. The highest proportion of the child population lives in Newton Farm (1,168, 4.2%), Saxon Gate (1,060, 3.8%), Hinton & Hunderton (994, 3.6%) and Red Hill (802, 2.7%). Ward-based population estimates 0-14 years old are shown in the appendices.

Based on ONS population forecasts (2018-based), the child population in Herefordshire (0 to 14 years) is forecast to decrease by 1.3% between 2023 and 2026. The decrease is forecast in the 5–9-year-old population, with populations of 0–4-year-olds and 10–14-year-olds remaining stable.

**ONS 2018-based sub-national population estimates – five-year age groups**

Age range	2023	2026	% change
0-4 years	8,950	8,991	+0.5
5-9 years	10,406	10,123	-2.7
10-14 years	11,349	11,206	-1.3
0-14 years	30,705	30,320	-1.3

**4.2 New housing**

There are significant new homes developments planned across Herefordshire. New homes developments are included in local authorities' Local Plans which the Government requires all LAs to revisit every five years.

Herefordshire's Local Plan 2021- 2041<sup>8</sup> will set out the planning framework for the county for the period to 2041 and will cover issues such as housing provision, the economy, retail and town centres, infrastructure provision and the environment. It will also set out policies by which planning applications will be determined, in addition to allocating land for housing, employment and other uses.

The Government wants to increase the supply of new housing across the country and local planning authorities must use the 'standard method' to determine how many dwellings need to be delivered every year. Local plans should provide for this amount unless there are exceptional circumstances that prevent this. The standard method shows that around 850 dwellings per year over the next 20 years are required in Herefordshire to meet its current housing need. This adds up to 17,000 dwellings. However, the draft options take into account existing planning permissions for housing and look to distribute an additional 11,200 dwellings.

**Amount of housing growth required**

As at April 2021 there were planning permissions for 5,875 new homes:

**Planning permissions as at April 2021**

<sup>8</sup> <https://www.herefordshire.gov.uk/local-plan-1/local-plan-2021-2041>

Area	Planning permissions as at April
	2021
Hereford	1,011
Bromyard	106
Kington	20
Ledbury	1,130
Leominster	439
Ross-on-Wye	525
Rural	2,644
Total	5,875

A number of options for how housing growth can be achieved to deliver an additional 11,200 dwellings, are set out in the consultation document, including rural area growth, single market town growth and combinations therein<sup>9</sup>. Consultation on the proposals took place in 2022.

The outcomes of consultations around new homes developments, and the planning permissions granted to date, will impact on childcare need and demand. Provision of childcare needs to be considered alongside new homes developments, to ensure childcare needs can be met, and the local authority can deliver the statutory childcare sufficiency duties.

#### 4.3 The economy in Herefordshire

Based on the 2021 Census, Herefordshire saw the West Midlands' third-largest percentage-point fall in the proportion of people aged 16 years and over (excluding full-time students) who were employed (from 58.3% in 2011 to 55.2% in 2021)<sup>10</sup>.

Working hours have changed, with 11.1% of residents aged 16 or over in employment, working 15 hours or less a week, compared to 10.5% in 2011. Just under 14% (13.7%) of people said they worked over 49 hours a week, compared to 16.6% in 2011.

<sup>9</sup> <https://www.herefordshire.gov.uk/downloads/file/23304/spatial-options-consultation-document-local-plan-2021-2041>

<sup>10</sup> <https://www.ons.gov.uk/visualisations/censusareachanges/E06000019/>

Working hours may have been affected by the COVID-19 pandemic.

### Economic activity

Economic activity refers to the number or percentage of people of working age who are either in employment or who are unemployed. Herefordshire has a lower percentage of the working age population (16-64 years) compared to the region and Great Britain (GB) as a whole. Within that, the percentage of the working age population economically active (October 2021 to September 2022) is broadly in line with GB and slightly higher than the West Midlands region. A higher proportion of Herefordshire's working population is self-employed.

### Economic activity rates October 2021 to September 2022

	Herefordshire %	West Midlands %	Great Britain %
All people:			
Economically active	78.9%	77.5%	78.4%
In employment	76.8%	73.6%	75.5%
Employees	63.2%	64.9%	66.0%
Self employed	13.3%	8.4%	9.2%
Unemployed	3.1%	4.9%	3.7%

Source: Office for National Statistics annual population survey (NOMIS). Percentage is a proportion of economically active.

### Types of employment

Compared to the West Midlands region, people in Herefordshire are more likely to work in manufacturing, construction and the wholesale and retail trade and less likely to work in areas such as public administration, finance and insurance and transportation and storage.

### Employee jobs (2021)

Employee jobs by industry	% of employee jobs		
	Herefordshire	West Midlands	Great Britain

	% of employee jobs		
Mining and quarrying	0.0	0.0	0.1
Manufacturing	14.5	10.4	7.6
Electricity, gas, steam and air conditioning supply	0.2	0.4	0.4
Water supply	1.2	0.9	0.7
Construction	5.3	4.3	4.9
Wholesale and retail trade; repair of motor vehicles and motorcycles	18.4	16.1	14.4
Transportation and storage	2.3	5.9	5.1
Accommodation and food service activities	7.9	6.6	7.5
Information and communication	3.0	3.6	4.5
Financial and insurance activities	0.9	2.1	3.6
Real estate activities	1.6	1.7	1.8
Professional, scientific and technical activities	6.6	6.9	8.9
Administrative and support service activities	7.9	9.3	8.9
Public administration and defence; compulsory social security	1.6	3.8	4.6
Education	7.9	8.7	8.8
Human health and social work activities	15.8	14.7	13.7
Arts, entertainment and recreation	3.0	2.5	2.3
Other service activities	1.6	1.9	1.9

Source: Office for National Statistics business register and employment survey

Just over a third of jobs in Herefordshire (34.2%) are part-time, compared to 32.1% in the West Midlands and 31.9% in GB.

### **Economic inactivity**

Economic inactivity refers to people who are neither in work nor employed. This group includes, for example, those looking after a home or retired. Economic inactivity rates in Herefordshire are lower than across the region and in line with the national figure.

### Economic inactivity rates October 2021 to September 2022

	Herefordshire %	West Midlands %	Great Britain %
All people: economically inactive	21.1	22.5	21.6
Wanting a job	12.2	18.1	18.4
Not wanting a job	87.8	81.9	81.6

Source: Office for National Statistics annual population survey (NOMIS)

### Out of work benefits

In December 2022 the Claimant Count in Herefordshire was 2.3%, compared to 4.8% in the West Midlands and 3.7% nationally (source: NOMIS – ONS Claimant Count).

In the period January – December 2021, 12.4% of households were workless (6,400 households). Source: ONS annual population survey, only includes households with at least one person aged 16-64 years. This compares to 14.2% in the West Midlands and 10.2% in GB.

### Universal Credit

Reported in Herefordshire cost-of-living bulletin January 2023<sup>11</sup>, provisional data suggested there were 12,000 Universal Credit claimants in Herefordshire in December 2022, slightly below the peak of 12,390 seen in April 2021 and well above the 5,980 seen in March 2020. Wards with the highest number of Universal Credit claimants were Hinton & Hunderton, Newton Farm, Leominster East, Widemarsh and Red Hill. In August 2022, there were 9,828 households in Herefordshire claiming Universal Credit, and of these, just over a half (5,000) had at least one child.

<sup>11</sup> <https://understanding.herefordshire.gov.uk/media/2103/cost-of-living-bulletin-issue-4-january-2023-v10.pptx>



## Earnings

Based on place of residence, full-time workers in Herefordshire earn less than workers in the West Midlands and GB as a whole.

### Earnings by residence (2021)

	Herefordshire £	West Midlands £	GB £
Gross weekly pay – full-time workers	560.1	613.3	642.2
Hourly pay excluding overtime – full-time workers	13.29	15.41	16.37

Source: Office for National Statistics annual survey of hours and earnings – resident analysis. Median earnings in pounds for employees living in the area.

#### 4.4 Index of Multiple Deprivation (IMD) 2019

The Index of Multiple Deprivation (IMD) is a national statistical measure that is published once every four years. The latest data was released in September 2019. The Index measures relative deprivation across small geographical areas or neighbourhoods that are called Lower Super Output Areas (LSOAs).

By combining LSOA data, local authorities are ranked across the following seven categories or domains: income; employment; health and disability; education skills and training; barriers to housing and services; crime; and the living environment. Each local authority also receives an overall IMD rank from 1 (the most deprived area) to 317 (the least deprived area).

Overall, Herefordshire ranks 137 out of 317 local authority areas. There are 11 LSOAs (out of 116) in Herefordshire in the most deprived 25% across England compared to 12 in 2015. The most deprived areas are located in the south of Hereford city and in Leominster, Ross-

on-Wye and Bromyard. Golden Post – Newton Farm in Hereford remains the most deprived area in the county and the only LSOA to be in the 10% most deprived nationally<sup>12</sup>.

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<sup>12</sup> Understand Herefordshire 'The Indices of Deprivation 2019 – Findings for Herefordshire  
<https://understanding.herefordshire.gov.uk/media/1900/iod2019-report-v10-final.pdf>

## 5 The early years and childcare market in Herefordshire

### (Based on data shared 7 February 2023)

There is a mix of early years and childcare provision in Herefordshire; an explanation about the different types of care offered is in appendix 10.

There were a total of 151 settings registered to delivery early years and childcare provision in January 2023. All registered settings offer provision for children aged 0-4 years old, with 17% (26 settings) offering provision for children aged 5 years and older. Collectively, settings (which include nursery provision based in schools) are registered for 3,888 places.

The number of registered settings has decreased from 191 reported in the 2019 CSA, attributable to a marked decrease in the number of childminders (from 84 in 2019 to 48 in 2023) and fewer group settings (58 compared to 77 in 2019). There has been an increase in the number of Governor-run provision in schools and in the number of academy nurseries (the latter being the result of more schools becoming academies).

The number of places has decreased from 4,407 in 2019.

### Registered provision 2023 compared to 2019

Type of provision	2019		2023	
	Settings	Places	Settings	Places
Childminding	84	524	48	331
Group settings	77	3,094	58	2,557
Governor run provision (exempt from early years registration)	15	294	20	419
Nursery classes in academy schools	4	60	10	237
Nursery classes in schools (including	11	435	15	344

Type of provision	2019		2023	
independent schools)				
Total	191	4,407	151	3,888

Source: Herefordshire CSA report 2019; Herefordshire data January 2023

### 5.1 Age ranges

The majority of settings offer early years and childcare provision for children aged 2, 3 and 4 years old. There are fewer baby places (for children aged 0-1 year 11 months). Provision for school-aged children is difficult to quantify. Childcare provision for children aged over eight years old is not required to register with Ofsted and the local authority may not hold information unless individual providers choose to share it. Such provision may include out of school activities run by the school for the pupils of the school. Parents may use this type of provision to fulfil some of their childcare needs but it is not possible to quantify capacity or how, or if, it is used as childcare.

There are a total of 26 settings registered with Ofsted to offer childcare provision for children aged 5 years old and over.

### Age range of registered provision

Number of registered settings offering places for (%)			
Baby places (0 months to 1 year 11 months)	2-year-old places	3- and 4-year-old places	Places for children aged 5 years and older*
65 (44%)	136 (91%)	149 (100%)	26 (17%)

Base: all data; percentages rounded

### 5.2 Availability of childcare

For analysis purposes, nursery classes in academy schools, nursery classes in schools and governor-run provision have been grouped together (as school-based provision), as have Charitable Incorporated Organisations (CIO), one college nursery and voluntary/committee run provisions (as community provision).

There is no registered provision available at weekends; the majority of settings are open Monday – Friday, with a small number (5, 3% of total) offering fewer than five days a week.

Just over half of settings (53%) operate all year round, in particular, childminding and private settings. School-based settings are nearly exclusively term-time only.

### Weeks open a year

Type of setting	Number of registered settings (%)	
	All year round	Term time only
Community	10 (34%)	19 (66%)
Private	23 (72%)	9 (28%)
Childminding	43 (90%)	5 (10%)
School-based nurseries	3 (10%)	37 (93%)
Overall	79 (53%)	70 (47%)

Base: all data; percentages rounded

### Opening times

A third of all settings (33%) open before 8am, with nearly half (46%) open between 8am and 9am. Private provision and childminding settings are more likely to be open earlier in the morning.

### Opening times

Type of provision	Number of settings and % of each group		
	Open before 8am	Open between 8am and 9am	Open 9am or later
Community	2 (7%)	17 (59%)	10 (34%)
Private	17 (53%)	13 (41%)	2 (6%)
Childminding	25 (52%)	21 (44%)	2 (4%)
School-based	5 (13%)	17 (43%)	18 (45%)
Overall	49 (33%)	68 (46%)	32 (21%)

Base: 149, percentages rounded

### Closing times

The majority of settings (59%) close from 5pm, with a relatively high proportion (34%) closing before 4pm.

### Closing times

Type of provision	Number of settings and % of each group			
	Up to 4pm	4pm to 5pm	5pm to 6pm	6pm and later
Community	13 (45%)	2 (7%)	11 (38%)	3 (10%)
Private	4 (13%)	4 (13%)	16 (50%)	8 (25%)
Childminding	3 (6%)	4 (8%)	27 (56%)	14 (29%)
School-based	30 (75%)	1 (3)	9 (23%)	0 (0%)
Overall	50 (34%)	11 (7%)	63 (42%)	25 (17%)

Base: 149, percentages rounded

### 5.3 Cost of childcare

Of the 151 settings, four (3%) do not offer fee-paying places, only offering funded early years places. Average costs for settings that do offer fee-paying places are shown below. The average cost for childcare reported in the 2019 CSA was £4.50 and hour; in 2023 the average fee per hour across all types of provision was £5.01, an increase of 11%.

- Community settings – the average cost per hour was £4.78, with a range of between £3.67 and £6.25.
- Private settings – the average cost per hour was £5.75 with a range of between £3.55 and £7.50.
- Childminding – the average cost per hour was £4.92 with a range of between £3.75 and £7.00.
- School-based nurseries – an average of £4.70 per hour with a range of between £4.00 and £5.50.

New early years funding rates were introduced for 2023/2024, commencing summer term 2023. The new early years funding rate gave providers delivering the early years entitlements an uplift of 1.01% for two-year-olds and 5.64% of the basic hourly rate for three- and four-year-olds. This brought the basic funding rate to £5.63 for two-year-olds and £4.48 for three- and four-year-olds.

To support provision in rural areas and areas of relative deprivation, the funding rate includes supplements for providers delivering in specific areas:

- The rurality supplement is £57 per week for providers delivering 100 hours of NEF (early years funding) per week, or £2,166 for 38 weeks. For settings delivering fewer than 100 hours NEF per week, the rurality supplement is 57p per hour.
- The deprivation supplement is 38p per hour for all children eligible for the Early Years Pupil Premium (EYPP).

#### 5.4 Quality of provision

Across all provision 90% is rated by Ofsted as Good or Outstanding. A very small percentage of settings (3%, 4 settings) were judged Inadequate and 2 (1%) as requiring improvement.

#### Ofsted inspection outcomes – all settings

Ofsted inspection outcome	Community	Private	Childminding	School-based	Overall
Outstanding	6 (21%)	9 (28%)	2 (4%)	5 (13%)	22 (15%)
Good	19 (66%)	21 (66%)	38 (79%)	33 (81%)	111 (75%)
Met	0 (0%)	0 (0%)	3 (6%)	0 (0%)	3 (2%)
Requires Improvement	1 (3%)	1 (3%)	0 (0%)	0 (0%)	2 (1%)
Inadequate	2 (7%)	0 (0%)	2 (4%)	0 (0%)	4 (3%)
Awaiting first inspection	1 (3%)	1 (3%)	3 (6%)	1 (4%)	6 (4)

Source: Herefordshire Council January 2023

#### 5.5 Distribution of early years and childcare provision

There are 53 wards across Herefordshire, and early years and childcare provision is available in all bar four of those wards (Belmont Rural, Leominster West, Newton Farm and Whitecross).

#### Childcare ratios

To provide a broad comparison of childcare across different areas, the number of registered childcare places has been calculated with the estimated population of children aged 0-4 years as a childcare ratio. It should be noted, childcare ratios underestimate the level of provision but do serve to provide a comparison between different areas.

Across Herefordshire the average childcare ratio for children aged 0-4 years is an estimated 0.44, or roughly one place per two to three children in this age range. Some of the places may be used for older children (as some settings do cater for older age ranges) however, it can be assumed the majority of places will be available for the 0-4 age range. Not every parent will choose to use formal childcare, and if they do choose to, many will not want a full-time place.

Childcare ratios are highest in the wards of Widemarsh (1.56 or roughly one and a half places per child aged 0-4 years), Old Gore (1.38), Tupsley (1.37), Leominster South and Kerne Bridge (both with a ratio of 1.12). In each of these wards there are more places than children in this age range. Excluding wards with no provision, childcare ratios are lowest in Holmer (0.03), College (0.11) Hampton (0.13) and Leominster North & Rural (0.14).

Childcare ratios by ward are shown in the appendices.

## 5.6 Holiday Activities and Food Programme (HAF)

The Government's Holiday Activities and Food programme (HAF) was rolled out nationally in 2020, and provides funding to local authorities for free holiday places for eligible children during prescribed school holidays. Eligible children are those eligible for, and in receipt of, benefits related Free School Meals (FSM).

### **HAF and childcare sufficiency**

The Government announced a continuation of HAF funding to 2024/2025 in the 2021 autumn Comprehensive Spending Review. This provided local authorities with an opportunity to plan on a longer timescale and consider the opportunities and threats for sustainable provision.



Whilst HAF is not included in guidance around the Childcare Sufficiency Duty as it post-dates it, there are clear links between the sufficiency duty and the new funding stream.

LAs will not be able to deliver HAF unless they have sufficient provision that meets the required framework of standards. HAF funding has provided valuable income for many settings that have been negatively impacted by changes in demand following COVID-19.

As we move forward with HAF it will be important to ensure provision is sustainable and can support not just funded families, but those (often working) families that require childcare across the longer holiday periods to support them to work.

There are a number of benefits to this approach:

- Avoiding stigmatising HAF provision as being ‘for poor families’ by opening it up to all
- Supporting non-eligible families to access affordable holiday childcare
- Supporting settings to provide valuable holiday childcare for working families and other families not eligible for HAF funding (and thereby supporting the LA statutory childcare sufficiency duty)
- To ensure provision set up in response to HAF funding, or relying heavily on HAF funding, is sustainable beyond that funding
- By including HAF planning in sufficiency assessment and market management strategies, there is less risk of the established out of school provider market being de-stabilised by new provision

A mixed model of delivery, where providers work with both funded families and fee-paying families, is recommended to achieve these aims. By encouraging HAF providers to register on the voluntary Ofsted childcare register, we open up the provision to fee-paying families that, whilst not eligible for HAF funding, may otherwise be unable to afford childcare. Once registered with Ofsted, a provider can deliver Tax Free Childcare and the childcare element of Universal Credit. Both of these schemes support families to reduce the costs of any childcare they purchase.

There is a need to ensure all out of school provision is included in planning HAF delivery, not just those settings directly involved in delivery. It is possible, if existing out of school providers that work year-round are not included, they may 'lose' their holiday business and that might in turn render term-time provision as unsustainable. To do this, HAF has to be embedded in childcare sufficiency strategies and planning, and not regarded as a stand-alone programme.

The number of Herefordshire children and young people attending HAF provision has been increasing. In 2022, 1,155 children attended HAF provision during the summer holidays.

## 6 Take-up of the early years entitlements in Herefordshire

All three- and four-year-olds and eligible two-year-olds are entitled to up to 15 hours a week, or 570 hours a year of free early years entitlement. These are referred to as funded entitlements.

From September 2017, eligible families with a three- and four-year-old became entitled to 30-hours childcare. 30-hours childcare is an extended early years entitlement which includes the 15 hours universal early years entitlement and an additional 15 hours (per week up to a maximum of 38 weeks, or 570 hours stretched across more weeks of the year). Eligibility for funded 30-hours childcare is based on both parents working in a couple household, and a single parent working in a lone-parent household, with minimum and maximum income thresholds applied. Parents apply to HMRC and, if eligible, are given a code which their chosen childcare provider validates before a place is taken up.

### **Take-up of the funded entitlements**

Data around the number of children accessing early years entitlements is collected by local authorities in January of each year, with data showing take-up of the funded early years entitlements as at January 2022 released in June 2022.

The COVID-19 pandemic impacted on the percentage of children taking up their funded early years entitlements nationally between 2019 and 2021, largely recovering to pre-

pandemic levels in 2022. During the first lockdown in response to COVID-19 in 2020, childcare provision closed to all bar vulnerable children and children of key workers, and subsequent lockdowns and localised restrictions impacted on demand for childcare across the country.

Take-up of the early years funded entitlements in Herefordshire showed a different pattern to the national and regional one, in particular for two-year-old funded children where take-up as a percentage of the eligible cohort increased from 63% in 2019 to 70% in 2021. Take-up has further increased to 86% in 2022, compared to a national figure of 72%.

The percentage of three- and four-year-olds taking up the universal funded entitlement for children in this age range fell between 2020 and 2022, but remains in line with national averages.

#### Take-up of the early years funded entitlements January 2022

	% of eligible children taking up their funded entitlement in the relevant year		
	Herefordshire	West Midlands	England
2-year-olds			
2022	86%	67%	72%
2021	70%	62%	59%
2020	67%	67%	69%
2019	63%	66%	68%
3- and 4-year-olds			
2022	92%	93%	92%
2021	93%	92%	90%
2020	95%	95%	93%
2019	95%	95%	93%

Source: DfE: Provision for children under 5, DfE, January 2022 released June 2022.

#### 6.1 Special Educational Needs Inclusion Fund and the Disability Access Fund

There are two key early years funding streams aimed at supporting access to the early years entitlements for children with Special Educational Needs and Disabilities (SEND); the Special Educational Needs Inclusion Fund (SENIF) and the Disability Access Fund (DAF).

All local authorities were required to establish a SENIF for three- and four-year-olds from April 2017. Local authorities, in consultation with local early years providers, parents and SEN specialists have specific responsibilities. They decide the children for which the fund could be used, the amount of money they set aside for the SENIF, and how that fund is allocated to providers. Local authorities are required to publish details of the SENIF. This should include the eligibility criteria, the planned value of the fund at the start of each financial year, and the process for allocating funding to providers as part of their 'Local Offer'.

The fund is pooled from either or both of the local authorities early years and high needs Dedicated Schools Grant (DSG) funding. The value of the fund must take into account the number of children with SEN in the local area, their level of need, and the overall capacity of the local childcare market to support children with SEND.

In Herefordshire, access to SENIF is through a written application which is considered at a panel held once every half term. Funding is awarded according to eligibility bands up to a maximum total of £1,045 per term.

The SEN Inclusion Fund for 2023-2024 is £150,000, equivalent to 8.3p per hour for two, three- and four-year-old nursery children.

The Disability Access Fund (DAF) was introduced in April 2017 to support disabled children's access to early years entitlements for three- and four-year-olds. Three- and four-year-olds are eligible for DAF if they receive the 15 hours a week universal early years entitlement and are in receipt of Disability Living Allowance (DLA).

Providers receive £800 per eligible child per year. They are responsible for identifying eligible children and are encouraged to use the DfE's parent declaration template. The template includes a DAF declaration. Local authorities are responsible for checking the DAF

eligibility criteria are met<sup>13</sup>. LAs must issue DAF payments to providers as soon as possible when the child takes up their universal 15 hours entitlement.

For each local authority, their total DLA claimant count of three- and four-year-old children from the Department of Works and Pensions (DWP) is adjusted downwards to remove an estimated number of children in Reception classes. Disability Access Funding in Herefordshire is £828 per eligible child, annually.

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<sup>13</sup> Department for education (DfE). Early years entitlements: local authority funding of providers, Operational Guidance 2019-2020 <https://www.gov.uk/government/publications/early-years-national-funding-formula-allocations-and-guidance> accessed 16/04/20

## 7 Herefordshire provider audit

Herefordshire Council audited all registered childcare providers, including schools delivering nursery provision, in February/March 2023. The aim of the audit was to get a more detailed picture of the early years and childcare market across the county, and to assess the impact on demand for early years and childcare following the COVID-19 pandemic and current economic climate, and to consider what support might be helpful.

A total of 151 registered childcare settings completed a survey, an overall response rate of 100%.

### Response rate (based on LA data)

	Nursery classes in academy schools	Childminder	Day nursery (including CIO and college nurseries)	Nursery classes in maintained schools, including Governor run	Voluntary/committee led provision	Independent school nursery	Overall
Number in audit	13	48	35	28	23	4	151
Number of registered providers	13	48	35	28	23	4	151
% Response rate	100%	100%	100%	100%	100%	100%	100%

Source: Provider audit/Herefordshire Council

Respondents were asked to identify the type of provision offered and data has been analysed according to this self-designation.

**Response rate (based on self-defined type of provision)**

Type of provision	Number in response sample	% of response sample
Academy nursery	8	5.3%
Childminder	48	31.7%
Day nursery	44	29.1%
Independent school	4	2.6%
Nursery class in maintained school	20	13.2%
Pre-school	27	17.9%
Overall	151	100%

Source: Provider audit/Herefordshire Council

**Note:** in the following tables 'base' refers to the number of respondents choosing to answer each question, so may be lower than the 151 settings completing an audit questionnaire.

### 7.1 Operating capacity compared to registered capacity

Respondents reported a total registration to offer 4,168 places, and an operating capacity (the number of places actually used) of 3,731. This represents an operating capacity of 90% overall, with different average operating capacities in different types of provision. The difference between operating capacity and registered capacity (or theoretical capacity) gives an indication of how much flex there may be in the market, should demand exceed supply. To be realised, flex would probably require settings to review their staffing.

The audit was undertaken in the spring term of 2023. Spring term is traditionally the mid-point of market demand – in autumn term there tends to be a lower level of demand as children transition into school, creating vacancies in childcare settings (including school-based nursery classes). Summer term tends to have the highest level of demand for childcare places, as children aged 4 or 5 await the transition to school, and younger children are seeking childcare provision.

Based on audit responses, there were a total of 521 vacancies in spring term 2023, 14% of operating capacity.

**Operating capacity and reported vacancy levels spring term 2023**

Type of provision*	Ofsted registered capacity	Operating capacity (% of registered capacity)	Vacancies February 2023 (% of operating capacity)
Nursery class in academy school	297	181 (61%)	24 (13%)
Childminder	306	247 (81%)	20 (8%)
Day nursery	2,064	2,010 (97%)	194 (10%)
Independent school	151	149 (99%)	48 (32%)
Nursery class in maintained school	617	578 (94%)	111 (19%)
Pre-school	721	566 (79%)	124 (22%)
Overall	4,168	3,731 (90%)	521 (14%)

\* Based on self-declared type of provision; percentages rounded

**7.2 Changes in demand**

Respondents were asked how demand for childcare had changed since the start of 2020 (since the lifting of the COVID-19 restrictions). Responses identified a mixed picture.

Overall, just under a quarter of settings (22%) reported a decrease in demand, with over half (51%) reporting an increase. Pre-school settings were more likely to have experienced a decrease in demand (49% reporting this had been the case) and day nurseries more likely to have experienced an increase (68%).



**Demand since the start of 2020 (lifting of the COVID-19 restrictions)**

Demand overall:	% of respondents (number)						
	Nursery class in academy school	Childminder	Day nursery	Independent school nursery	Nursery class in maintained school	Pre-school	Overall
Increased a lot	0% (0)	34% (16)	45% (20)	0% (0)	15% (3)	11% (3)	28% (42)
Increased slightly	63% (5)	17% (8)	23% (10)	25% (1)	30% (6)	19% (5)	23% (35)
About the same	13% (1)	36% (17)	18% (8)	50% (2)	30% (6)	22% (6)	27% (40)
Decreased slightly	13% (1)	9% (4)	5% (2)	25% (1)	10% (2)	30% (8)	12% (18)
Decreased a lot	13% (1)	4% (2)	9% (4)	0% (0)	19% (3)	19% (5)	10% (15)

Base: all respondents, 150, (excludes one respondent – a new childminder). Percentages rounded.

**Note:** In the following tables, nursery classes in academy nurseries and independent schools have been combined with nursery classes in maintained provision, reported under ‘school-based provision’.

**Demand for children aged 0 -1 (baby places)**

Across all respondents, just over a third (34%) reported an increase in demand for baby places. This was particularly evident in childminding and day nursery settings, reflecting the age ranges that different types of provision provide for.

Demand for children aged 0-1	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Increased demand	44% (21)	55% (24)	6% (2)	15% (4)	34% (51)
Decreased demand	8% (4)	5% (2)	0% (0)	0% (0)	4% (6)

### Demand for the funded early years entitlements

Patterns of demand for the funded early years entitlements show a mixed picture, with some settings experiencing an increase, and others, a decrease. Looking at the two-year-old entitlement, the trend for pre-schools is towards decreased demand and for schools, a trend towards increased demand. For other types of provision, the split between those that experienced a decreased and those that experienced an increase is broadly even.

Demand for the 2-year-old entitlement	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Increased demand	8% (4)	11% (5)	16% (5)	4% (1)	10% (15)
Decreased demand	6% (3)	7% (3)	3% (1)	15% (4)	7% (11)

For the universal entitlement for three-and four-year-olds, day nurseries were more likely to have experienced an increase in demand overall, with pre-schools showing a relatively equal split between increased and decreased demand.

Demand for the universal entitlement for 3- and 4-year-olds	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Increased demand	8% (4)	32% (14)	22% (7)	19% (5)	20% (30)
Decreased demand	2% (1)	5% (2)	3% (1)	15% (4)	5% (8)

Overall, demand for 30-hours has increased as 26% of respondents reported demand had increased and 13% reported a decrease. Within that, schools and pre-schools were more likely to report a decrease in demand for 30-hours.

Demand for 30-hours	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Increased demand	19% (9)	36% (16)	22% (7)	22% (6)	25% (38)
Decreased demand	2% (1)	7% (3)	19% (6)	33% (9)	13% (19)

Of those reporting a change in demand, 13% reported parents choosing to use only one setting for their 30-hours childcare, with a higher percentage of day nurseries (20%) reporting this issue.

Parents choosing to use one setting for 30 hours childcare	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
	8% (4)	20% (9)	13% (4)	7% (2)	13% (19)

### Changes in patterns of demand

One possible outcome of the post-pandemic is parents wanting fewer hours or shorter days, if their working patterns had changed. Across all respondents, fewer than one in ten (9%) reported this to have been the case.

Demand for fewer hours or shorter days	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
	10% (5)	7% (3)	6% (2)	11% (3)	9% (13)

There is a higher demand for greater flexibility and parents changing their childcare plans regularly. This was reported by 22% of respondents overall.

Parents wanting more flexibility, changing their childcare plans regularly	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
	13% (6)	30% (13)	22% (7)	26% (7)	22% (33)

### Wrap-around childcare

Respondents identified an increase in demand for wrap-around childcare.

Demand for wrap-around	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Increased demand	13% (6)	20% (9)	13% (4)	15% (4)	15% (23)
Decreased demand	8% (4)	5% (2)	0% (0)	0% (0)	4% (6)

### Demand for paid for provision

A higher proportion of pre-school respondents reported less demand for paid-for childcare:

Demand for paid for hours	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Increased demand	13% (6)	23% (10)	9% (3)	7% (2)	14% (21)
Decreased demand	0% (0)	18% (8)	16% (5)	41% (11)	16% (24)

### Changes in demand for SEND provision

Settings reported a change in demand since the start of the pandemic, 22% reported there had been an increase in demand for SEND provision.

Changes in demand for SEND provision	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Increased demand	8% (4)	34% (15)	31% (10)	15% (4)	22% (33)
Decreased demand	0% (0)	2% (1)	0% (0)	0% (0)	0.7% (1)

### 7.3 Attendance rates for children with SEND

Respondents were asked if there had been a change in the attendance rate of children with SEND normally attending the setting. Across all respondents, 30% had experienced an increase, with a higher percentage (47%) of day nurseries reporting an increase.

### Attendance of children with SEND

Attendance of children with SEND	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Has increased	11% (5)	47% (20)	35% (11)	30% (8)	30% (44)
Is about the same	89% (40)	49% (21)	61% (19)	67% (18)	67% (98)

Attendance of children with SEND	% of respondents (number)				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Has decreased	0% (0)	5% (2)	3% (1)	4% (1)	3% (4)

Base: all respondents 146. Percentages rounded.

Respondents were also asked if they had noticed an increase in the number of children presenting additional needs. Over half (56%) of respondents reported that they had, including 81% of school-based provision, 73% of day nursery settings, 63% of pre-schools and 21% of childminders.

Comments providing more information about the type of increases noted are shown verbatim in the appendices. Increases are predominantly around speech and language and social and emotional needs.

#### 7.4 Unmet demand

Around half of all respondents reported demand that they could not meet (49%). Unmet demand was reported as particularly high in childminding and day nurseries.

#### Unmet demand

% (and number) of respondents reporting demand that could not be met				
Childminder	Day nursery	School-based provision	Pre-school	Overall
60% (28)	68% (30)	22% (7)	30% (8)	49% (73)

Base: all respondents 150. Percentages rounded.

Where respondents have described unmet demand, comments are shown verbatim in the appendices. Many respondents comment on being full or having reached capacity and unable to take on any new children, with some reporting their capacity was limited due to staff numbers.

## 7.5 Responding to COVID-19

Respondents were asked if they had made any changes to their provision since 2020 (the lifting of the COVID-19 pandemic restrictions). Over a third of settings (38%) had not made any changes:

### Changes to provision since 2020

% (and number) of respondents reporting no changes				
Childminder	Day nursery	School	Pre-school	Overall
44% (21)	23% (10)	47% (15)	42% (11)	38% (57)

Base: all respondents 150. Percentages rounded.

The most common change made to provision was an increase in fees (36% of settings) with changes to staffing arrangements reported by 24% of respondents:

### Changes made to provision since 2020

Change made	% of settings reporting (number)
No changes made	38% (57)
Increased fees	36% (54)
Changed staffing arrangements	24% (36)
More places	13% (19)
Fewer places	8% (12)
Longer days	6% (9)
Shorter days	5% (8)
Fewer days	5% (8)
More hours	5% (7)
More weeks	4% (6)
Fewer hours	3% (5)
More days	3% (4)
Fewer weeks	1% (2)
Changed use of funding for places	1% (2)
Reduced fees	0.7% (1)
Other changes*	3% (5)
New setting	3% (4)

Base: all respondents, 150. Percentages rounded.

\* Other includes restrictions on how places can be used, not related to the pandemic, and separate 2-year-old registration operating from birth for 51 weeks a year.

Respondents provided additional comment on why the setting had introduced changes, and the difference those changes had made. Comments vary (and are shown verbatim in the appendices) with a number referring to increased costs of delivery, or changes in parental demand.

## 7.6 Finances

Across all respondents, 50% reported current income was insufficient to meet costs.

Childminding respondents were more likely to report income was sufficient to meet costs (62%) with a low number of respondents overall reporting income will exceed costs:

### Current income

<b>Current income:</b>	<b>Childminder</b>	<b>Day nursery</b>	<b>School-based provision</b>	<b>Pre-school</b>	<b>Overall</b>
Will exceed costs	13% (6)	7% (3)	0% (0)	0% (0)	6% (9)
Is enough to meet costs	62% (28)	43% (18)	26% (8)	37% (10)	44% (64)
Is insufficient to meet costs	24% (11)	50% (21)	74% (23)	63% (17)	50% (72)

Base: all respondents, 145. Percentages rounded.

Just over a third of respondents (35%) reported confidence in their setting's financial sustainability in the next 6 to 12 months. The overall percentage is boosted by the number of childminders reporting confidence in their financial sustainability:



**Confidence in financial sustainability in the next 6 to 12 months**

	<b>% (and number) of settings reporting:</b>				
<b>Confidence in financial sustainability</b>	<b>Childminder</b>	<b>Day nursery</b>	<b>School-based provision</b>	<b>Pre-school</b>	<b>Overall</b>
Very confident	11% (5)	2% (1)	6% (2)	4% (1)	6% (9)
Confident	35% (16)	29% (12)	28% (9)	19% (5)	29% (42)
Neither confident not unconfident	39% (18)	26% (11)	44% (14)	41% (11)	37% (54)
Unconfident	11% (5)	33% (14)	9% (3)	22% (6)	19% (28)
Very unconfident	4% (2)	10% (4)	13% (4)	15% (4)	10% (14)

Base: all respondents, 147. Percentages rounded.

To understand issues affecting confidence in financial sustainability, respondents were asked to rate a number of statements according to the extent they agreed or disagreed.

**Income levels**

Two-thirds of respondents overall agreed or strongly agreed income levels were a concern:

**Income levels causing concern**

	<b>% (and number) of respondents:</b>				
<b>Type of provision</b>	<b>Childminder</b>	<b>Day nursery</b>	<b>School-based provision</b>	<b>Pre-school</b>	<b>Overall</b>
Strongly agree	8% (3)	35% (14)	48% (19)	8% (3)	3% (1)
Agree	56% (23)	20% (8)	17% (7)	2% (1)	5% (2)
Neither agree nor disagree	13% (4)	58% (18)	29% (9)	0% (0)	0% (0)
Disagree	48% (13)	30% (8)	4% (1)	11% (3)	7% (2)
Strongly disagree	31% (43)	35% (48)	26% (36)	5% (7)	4% (5)

Base: all respondents, 139. Percentages rounded.

### Cash flow

Cash flow was also reported to be a concern by the majority of respondents (47%), particularly amongst day nursery and pre-school settings:

### Cash flow

	% (and number) of respondents:				
Type of provision	Childminder	Day nursery	School-based provision	Pre-school	Overall
Strongly agree	3% (1)	28% (11)	58% (23)	10% (4)	3% (1)
Agree	39% (16)	20% (8)	24% (10)	15% (6)	2% (1)
Neither agree nor disagree	13% (4)	30% (9)	50% (15)	7% (2)	0% (0)
Disagree	33% (9)	22% (6)	22% (6)	15% (4)	7% (2)
Strongly disagree	22% (30)	25% (34)	39% (54)	12% (16)	3% (4)

Base: all respondents, 138. Percentages rounded.

### Expenditure exceeding income

A high proportion (61%) of respondents reported concern around expenditure exceeding income, with a high proportion of day nurseries and pre-schools reporting this to be the case:

### Expenditure exceeding oncome

	% (and number) of respondents:				
Type of provision	Childminder	Day nursery	School-based provision	Pre-school	Overall
Strongly agree	3% (1)	28% (11)	31% (12)	31% (12)	8% (3)
Agree	51% (21)	20% (8)	7% (3)	20% (8)	2% (1)
Neither agree nor disagree	22% (7)	56% (18)	16% (5)	3% (1)	3% (1)
Disagree	30% (8)	37% (10)	19% (5)	7% (2)	7% (2)
Strongly disagree	27% (37)	34% (47)	18% (25)	17% (23)	5% (7)

Base: all respondents, 139. Percentages rounded.

**Levels of demand**

Four in ten respondents (41%) reported concern around high levels of demand (which could not be fulfilled).

### High levels of demand causing concern

	% (and number) of respondents:				
Type of provision	Childminder	Day nursery	Neither agree nor disagree	Disagree	Strongly disagree
Strongly agree	19% (8)	35% (15)	28% (12)	14% (6)	5% (2)
Agree	26% (11)	21% (9)	33% (14)	14% (6)	5% (2)
School-based provision	3% (1)	20% (6)	27% (8)	33% (10)	17% (5)
Pre-school	7% (2)	26% (7)	26% (7)	30% (8)	11% (3)
Overall	15% (22)	26% (37)	29% (41)	21% (30)	8% (12)

Base: all respondents, 142. Percentages rounded.

A lower percentage of respondents were concerned about low levels of demand (22% overall):

### Low levels of demand causing concern

	% (and number) of respondents:				
Type of provision	Childminder	Day nursery	School-based provision	Pre-school	Overall
Strongly agree	3% (1)	10% (4)	30% (12)	24% (10)	33% (13)
Agree	12% (5)	2% (1)	34% (14)	20% (8)	32% (13)
Neither agree nor disagree	13% (4)	26% (8)	31% (9)	31% (9)	3% (1)
Disagree	15% (4)	15% (4)	33% (9)	26% (7)	11% (3)
Strongly disagree	10% (14)	12% (17)	32% (44)	24% (34)	22% (30)

Base: all respondents, 139. Percentages rounded.

### Income derived from early years funding

Settings delivering the early years entitlements were asked what percentage of their business income was derived from early years funding, and from private income (e.g. parent fees). Not all settings deliver the early learning entitlements, and some settings (37) declined to answer the question. Responses identify schools and pre-schools having a higher reliance on early years funding:

**Income derived from early years funding**

Percentage of income derived from early years funding	% (and number) of respondents				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
0% – 20%	40% (12)	7% (3)	0% (0)	0% (0)	13% (15)
21% - 40%	40% (12)	29% (12)	0% (0)	4% (1)	22% (25)
41% - 60%	17% (5)	22% (9)	22% (4)	24% (6)	21% (24)
61% - 80%	3% (1)	29% (12)	33% (6)	48% (12)	27% (31)
81% - 100%	0% (0)	12% (5)	44% (8)	24% (6)	17% (19)

Base: all respondents, 114. Percentages rounded.

**7.7 Staffing**

Collectively, respondents were employing 870 staff at the time of the audit – this grosses up to 906 to account for non-respondents. The majority of staff were employed in day nursery provision (589 – 640 grossed up).

**Number of permanent staff employed**

Number	Childminder	Day nursery	School-based provision	Pre-school	Overall
Declared in survey	9	589	146	126	870
Grossed up	10	640			906
Base (respondents)	42 (88%)	44 (92%)	32 (100%)	27 (100%)	145 (96%)

\* The childminder response excludes four respondents who reported 'self' and one working alongside another childminder under the same name

Respondents were asked if they had made any staff changes since the lifting of the COVID-19 pandemic restrictions. Just less than half of all respondents (42%) reported they had made staff changes, in the main group settings (day nurseries and pre-schools) and schools:

**Staff changes made since the lifting of the COVID-19 restrictions**

Type of provision	% (and number) of respondents reporting staff changes			
	Day nursery	School-based provision	Pre-school	Overall
Childminder	57% (25)	65% (20)	56% (15)	42% (42)
	4% (2)			

Base: all respondents, 148. Percentages rounded.

Staff changes were made due to a variety of circumstances, including changes in demand, staff choosing different working patterns, or leaving. Comments made regarding staff changes made are shown in the appendices.

Across all provision, there were 30 temporary or agency staff employed at the time of the audit. This included relief assistants (two settings), maternity cover (one setting), and an EYFS apprentice (one setting).

The highest number of temporary or agency staff (17, 57% of total) were employed in school settings.

Respondents were asked if they had concerns relating to a number of staffing issues. The availability of applicants was a concern for the majority of group settings. Note: a high number of childminders do not employ staff, and reflecting this, a high number did not respond to questions around staffing concerns.

**Issue: concern around staff recruitment, availability of applicants**

Type of provision	% (and number) of respondents:				
	Childminder	Day nursery	School-based provision	Pre-school	Overall
Strongly agree	4% (1)	0% (0)	89% (24)	4% (1)	4% (1)
Agree	70% (30)	7% (3)	16% (7)	5% (2)	2% (1)
Neither agree nor disagree	27% (8)	40% (12)	27% (8)	7% (2)	0% (0)
Disagree	56% (14)	24% (6)	12% (3)	0% (0)	8% (2)

	<b>% (and number) of respondents:</b>				
Strongly disagree	42% (53)	17% (21)	34% (42)	4% (5)	3% (4)

Base: all respondents, 125. Percentages rounded.

Concerns around the training level or experience of applicants was identified as a concern for the majority of group provision, and especially by day nursery settings:

#### **Issue: concern around staff recruitment, training level or experience of applicants**

	<b>% (and number) of respondents:</b>				
<b>Type of provision</b>	<b>Childminder</b>	<b>Day nursery</b>	<b>School-based provision</b>	<b>Pre-school</b>	<b>Overall</b>
Strongly agree	4% (1)	0% (0)	89% (25)	4% (1)	4% (1)
Agree	67% (29)	14% (6)	16% (7)	0% (0)	2% (1)
Neither agree nor disagree	20% (6)	40% (12)	27% (8)	10% (3)	3% (1)
Disagree	40% (10)	24% (6)	28% (7)	0% (0)	8% (2)
Strongly disagree	37% (46)	19% (24)	37% (47)	3% (4)	4% (5)

Base: all respondents, 126. Percentages rounded.

Retention of staff was of lower levels of concern, albeit nearly a quarter (22%) of respondents identified this as an issue:

#### **Issue: retention of staff**

	<b>% (and number) of respondents:</b>				
<b>Type of provision</b>	<b>Childminder</b>	<b>Day nursery</b>	<b>School-based provision</b>	<b>Pre-school</b>	<b>Overall</b>
Strongly agree	4% (1)	4% (1)	89% (24)	4% (1)	0% (0)
Agree	17% (7)	19% (8)	40% (17)	21% (9)	2% (1)
Neither agree nor disagree	0% (0)	17% (5)	37% (11)	23% (7)	23% (7)
Disagree	4% (1)	16% (4)	36% (9)	28% (7)	16% (4)
Strongly disagree	7% (9)	15% (18)	49% (61)	19% (24)	10% (12)

Base: all respondents, 124. Percentages rounded.

Access to, and costs of, training were reported as an issue by 35% and 49% of respondents respectively. Over half of all day nursery respondents (53%) agreed or strongly agreed access to training was an issue. A relatively high proportion of respondents reported the costs of training were a concern, particularly amongst day nursery, childminder and pre-school settings:

### Issue: Access to training

	% (and number) of respondents:				
Type of provision	Childminder	Day nursery	School-based provision	Pre-school	Overall
Strongly agree	3% (1)	17% (5)	66% (19)	14% (4)	0% (0)
Agree	24% (10)	29% (12)	33% (14)	12% (5)	2% (1)
Neither agree nor disagree	10% (3)	20% (6)	27% (8)	33% (10)	10% (3)
Disagree	8% (2)	20% (5)	44% (11)	20% (5)	8% (2)
Strongly disagree	13% (16)	22% (28)	41% (52)	19% (24)	5% (6)

Base: all respondents, 126. Percentages rounded.

### Issue: costs of training

	% (and number) of respondents:				
Type of provision	Childminder	Day nursery	School-based provision	Pre-school	Overall
Strongly agree	21% (6)	24% (7)	52% (15)	3% (1)	0% (0)
Agree	35% (15)	23% (10)	30% (13)	12% (5)	0% (0)
Neither agree nor disagree	13% (4)	23% (7)	32% (10)	23% (7)	10% (3)
Disagree	19% (5)	38% (10)	27% (7)	15% (4)	0% (0)
Strongly disagree	23% (30)	26% (34)	35% (45)	13% (17)	2% (3)

Base: all respondents, 129. Percentages rounded.



### **Comments re: staffing issues**

Respondents experiencing staffing issues were asked to comment further, 68 respondents (45% of total) chose to do so. Comments related predominantly to a lack of suitable candidates, either in terms of a lack of applications for advertised posts, or applicants not having the relevant training or experience. Comments are shown verbatim in the appendices.

### **What support might help?**

Comments regarding what support might help with staffing issues are shown verbatim in the appendices. A number refer to the funding rate for the early years entitlements, and the ability of settings to pay a market rate and offer other incentives to attract qualified staff. Some comments refer to the need for intervention with training providers to ensure requisite skills are taught, with greater promotion and awareness of what training and/or careers are available.

### **7.8 Support for childcare settings during the COVID-19 pandemic and beyond**

Herefordshire Council offered support to all registered early years and childcare settings throughout the COVID-19 pandemic. This included the continuation of early years funding in spring term 2020 (for settings delivering funded places) and top up early years funding in autumn term 2020, to ensure settings offering early years funded places were not impacted by lower levels of demand and closures due to COVID-19. All early years and childcare providers were given access to online briefings, guidance and information which was invaluable given the rapidly changing infection controls and Government guidance throughout the pandemic, and particularly in spring and summer 2020. Regular support was also available from both Talk Community, business support training and the local authority early years team.

Respondents were asked if they had used local authority support, and if so, the extent to which that support worked for them on a scale of one (not useful) to five (very useful). In the following table the proportion using the support is a percentage of those responding, not all respondents.



**Local authority support used and average usefulness rating**

	% respondents using (and number)					Average usefulness rating (out of 5)
	Childminder	Day nursery	School-based provision	Pre-school	Overall	
Continuation of the free entitlement funding during the first lockdown period (spring 2020)	50% (20)	76% (31)	30% (8)	65% (17)	57% (76)	4.50
Early years top-up funding in the autumn term 2020	24% ((9)	59% (22)	15% (4)	42% (10)	36% (45)	4.26
Access to briefings, guidance and information from the LA	59% (24)	75% (30)	57% (17)	85% (22)	65% (93)	3.77
Support from Talk Community (in relation to families information)	31% (38)	21% (8)	46% (17)	25% (6)	30% (7)	2.74
Regular support from the LA Early Years Team	76% (32)	75% (30)	53% (16)	84% (21)	72% (99)	3.72
Email updates from the LA	72% (31)	76% (32)	65% (20)	92% (24)	75% (107)	3.80
Business support from Hempsall's	18% (7)	40% (14)	9% (2)	38% (9)	27% (32)	2.63
Outbreak Hub	24% (9)	68% (28)	28% (7)	52% (13)	44% (57)	3.30

Base: all respondents range 119 to 142. Excludes non-respondents. Percentages rounded. Multiple responses.

## 7.9 Any final comments

Respondents were invited to share any other comments about their business. There were 31 comments (21% of total respondents), covering a range of topics.

- Nearly half of all comments (14, 45% of total) referred to the early years funding rate and/or financial sustainability
- A quarter (26%) related to support – either praising support received, or where support might be required
- 16% of comments (5 in total) gave information about the setting
- Two respondents (13% of total commenting) referred to demand and a similar number made another comment

Comments are shown verbatim in the appendices.

## Appendices

- 1 Ward based population estimates
- 2 Ward childcare ratios
- 3 Provider audit comments regarding an increase in number of children presenting with additional needs (verbatim comments)
- 4 Provider audit comments regarding unmet demand (verbatim comments)
- 5 Provider audit comments regarding rationale for introducing staffing changes and the difference made (verbatim comments)
- 6 Provider audit comments regarding staff changes (verbatim comments)
- 7 Provider audit comments regarding staffing issues (verbatim comments)
- 8 Provider audit comments regarding support for staffing issues (verbatim comments)
- 9 Provider audit final comments (verbatim comments)
- 10 Different types of childcare

**Appendix 1 – Mid 2020 population estimates for 2020 wards (ONS)**

<b>Ward Name</b>	<b>Age range</b>					
	<b>0 to 1</b>	<b>2</b>	<b>3 and 4</b>	<b>5 to 10</b>	<b>11 to 14</b>	<b>All 0-14</b>
Arrow	50	33	50	219	175	527
Aylestone Hill	56	31	68	254	216	625
Backbury	47	23	58	218	168	514
Belmont Rural	96	51	82	268	138	635
Birch	39	20	46	249	164	518
Bircher	42	17	65	238	161	523
Bishops Frome & Cradley	33	18	53	158	133	395
Bobblestock	78	32	72	229	150	561
Bromyard Bringsty	46	31	51	170	117	415
Bromyard West	58	22	81	200	161	522
Castle	42	18	56	179	123	418
Central	38	26	58	208	131	461
College	84	48	86	269	145	632
Dinedor Hill	61	39	81	229	166	576
Eign Hill	57	21	59	203	158	498
Golden Valley North	57	38	53	208	167	523
Golden Valley South	60	28	72	234	164	558
Greyfriars	83	36	66	236	148	569
Hagley	83	36	115	327	181	742
Hampton	47	29	51	196	123	446
Hinton & Hunderton	126	70	135	425	238	994
Holmer	72	46	81	325	162	686
Hope End	35	16	54	196	179	480
Kerne Bridge	25	20	29	154	112	340
Kings Acre	62	48	64	246	184	604
Kington	76	37	78	200	118	509
Ledbury North	26	14	37	111	78	266
Ledbury South	46	21	69	207	119	462
Ledbury West	53	37	79	302	233	704
Leominster East	86	48	107	209	148	598
Leominster North & Rural	74	49	90	296	175	684
Leominster South	72	30	70	235	150	557
Leominster West	67	30	72	203	109	481
Llangarron	38	30	49	207	136	460
Mortimer	55	38	56	217	134	500
Newton Farm	110	80	128	564	286	1168
Old Gore	37	16	49	143	129	374
Penyard	47	20	55	192	119	433
Red Hill	96	54	91	357	204	802
Ross East	50	36	63	209	145	503

Ross North	71	44	94	265	154	628
Ross West	48	28	58	240	159	533
Saxon Gate	149	76	161	455	219	1060
Three Crosses	47	34	69	185	143	478
Tupsley	44	32	55	229	170	530
Weobley	55	33	62	230	179	559
Whitecross	83	43	73	290	185	674
Widemarsh	68	34	72	223	132	529
Wormside	69	28	88	236	175	596
Credenhill	79	55	99	292	183	708
Queenswood	42	26	63	222	140	493
Stoney Street	65	36	79	239	155	574
Sutton Walls	52	29	60	218	136	495
Overall						

**Appendix 2 – Ward childcare ratios**

<b>Ward</b>	<b>Total registered places - all age ranges</b>	<b>Age 0-4 Population ward 2020 estimates</b>	<b>Childcare ratio</b>
Arrow	40	133	0.30
Aylestone Hill	54	155	0.35
Backbury	43	128	0.34
Belmont Rural	0	229	0.00
Birch	65	105	0.62
Bircher	62	124	0.50
Bishops Frome & Cradley	25	104	0.24
Bobblestock	36	182	0.20
Bromyard Bringsty	36	128	0.28
Bromyard West	116	161	0.72
Castle	110	116	0.95
Central	65	122	0.53
College	24	218	0.11
Credenhill	99	233	0.42
Dinedor Hill	77	181	0.43
Eign Hill	66	137	0.48
Golden Valley North	87	148	0.59
Golden Valley South	53	160	0.33
Greyfriars	66	185	0.36
Hagley	135	234	0.58
Hampton	16	127	0.13
Hinton & Hunderton	266	331	0.80
Holmer	6	199	0.03
Hope End	59	105	0.56
Kerne Bridge	83	74	1.12
Kings Acre	36	174	0.21
Kington	71	191	0.37
Ledbury North	35	77	0.45
Ledbury South	50	136	0.37
Ledbury West	46	169	0.27
Leominster East	58	241	0.24
Leominster North & Rural	30	213	0.14
Leominster South	193	172	1.12
Leominster West	0	169	0.00
Llangarron	24	117	0.21
Mortimer	50	149	0.34
Newton Farm	0	318	0.00
Old Gore	141	102	1.38
Penyard	31	122	0.25



Queenswood	50	131	0.38
Red Hill	155	241	0.64
Ross East	88	149	0.59
Ross North	46	209	0.22
Ross West	95	134	0.71
Saxon Gate	80	386	0.21
Stoney Street	48	180	0.27
Sutton Walls	86	141	0.61
Three Crosses	73	150	0.49
Tupsley	180	131	1.37
Weobley	84	150	0.56
Whitecross	0	199	0.00
Widemarsh	272	174	1.56
Wormside	177	185	0.96
Overall	3,888	8,929	0.44

**Appendix 3 – Provider audit comments regarding an increase in the number of children presenting with additional needs (verbatim comments)**

Type of setting	
Nursery class in academy school	Yes, behavioural, emotional and communication needs.
Nursery class in academy school	Yes, more children presenting with speech delay.
Nursery class in academy school	Yes, communication and language proficiency decreased. Some children still in nappies.
Childminder	I have one child currently on role meeting these criteria.
Childminder	Some need additional help with speech.
Childminder	Speech and language.
Childminder	Socialising skills in some children.
Childminder	More children are showing signs of special educational needs.
Childminder	Slight language delay.
Childminder	Yes, with speech.
Childminder	Yes, especially speech and language difficulties.
Day Nursery	Yes, children with additional needs is constantly rising.
Day Nursery	Yes, Speech and language delay has increased, and an increase in children with possible ASD.
Day Nursery	Yes - varying needs.
Day Nursery	Since COVID we have found an increase in children with speech and language delay, and the lack of additional support from other agencies.
Day Nursery	More delayed speech and PSE and attachment delays.
Day Nursery	More children with speech and language problems.
Day Nursery	We have been contacted for many more SEN spaces.
Day Nursery	We have an increase of challenging behavioural issues in our preschool class.
Day Nursery	Yes, speech and language difficulties and personal social emotional needs.
Day Nursery	Not really, we have always had children with speech difficulties and needing support with SALT, so about the same.
Day Nursery	Yes - additional needs presenting later with a number of children.
Day Nursery	There has been an increase in the amount of children with speech and communication needs, however, we feel that this is not just as a result of Covid but more as changes in lifestyle with the increased use of technology and social media. Parents not interacting as much as before with their children.
Day Nursery	Massive increase, in particular children with social /communication difficulties, ASD.
Day Nursery	Yes. We have had children presenting with more complex needs more regularly.
Day Nursery	Yes, since Covid, we have had an increase of children presenting with personal, social and emotional difficulties.
Day Nursery	We have gone from having one child to six children.
Day Nursery	Yes - S&L, Autistic spectrum.
Day Nursery	Yes, there are more identified additional needs.

Independent School nursery	Yes- SaLT and PSED due to lack of quality interactions during covid years.
Independent School nursery	Yes - speech therapy due to language delay.
Maintained School Nursery Class	Yes, a lot more children.
Maintained School Nursery Class	Yes, a huge increase.
Maintained School Nursery Class	Yes, especially speech and language.
Maintained School Nursery Class	Toileting and speech. Sensory.
Maintained School Nursery Class	Increase in speech and language delay.
Maintained School Nursery Class	Yes, particularly pupils with significant needs.
Maintained School Nursery Class	Yes- especially S&L provision which has a knock-on effect with Social and Emotional Health. Also linked to poorer parenting skills.
Pre-school/Playgroup	Yes, more children are presenting with speech and language needs and social/ emotional needs.
Pre-school/Playgroup	We have noticed more children requiring additional support that do not have diagnosed conditions.
Pre-school/Playgroup	Yes, more with complex needs.
Pre-school/Playgroup	Some children returning after COVID have some personal and social delays and some have Speech and language delays resulting in more SALT referrals being made.
Pre-school/Playgroup	Yes, emotionally and speech and language.
Pre-school/Playgroup	We have more children with speech and language and behaviour needs that need support through IEPs or small group intervention. Children are needing more support to become school ready too, independence etc.
Pre-school/Playgroup	Yes, for communication and language and PSED.
Pre-school/Playgroup	Yes, we have four SEN children plus several children with S & L difficulties
Pre-school/Playgroup	More support with PSED has been required.
Pre-school/Playgroup	Yes, speech delays.
Pre-school/Playgroup	SALT.
Pre-school/Playgroup	We do have fairly significant numbers of children presenting with additional needs, but this has remained the same since opening (post 2020).
Pre-school/Playgroup	Increase in SLCN.

**Appendix 4 – Provider audit comments regarding unmet demand (verbatim comments)**

Type of setting	Unmet demand
Nursery Class in academy school	Usually have a waiting list of approximately four places per annum.
Nursery class in academy school	Parents wanted a place for the summer term, and we are full. Two families on the waiting list.
Childminder	I get enquiries nearly every day for childcare. I have been fully booked since 2020 and will be until late 2024. I turn parents away who are crying because they can't find nurseries or childminders with spaces. Nurseries are shutting down due to ridiculous running costs and lack of staff and due to Ofsted inconsistencies and lack of support, Childminders are steadily leaving.
Childminder	Full time childcare i.e., five days a week.
Childminder	Can't have more than three under 3.
Childminder	I am full.
Childminder	We have a waiting list which we have now closed to new enquiries as we have too many on the list now.
Childminder	There is not enough childcare in my area. With nurseries closing and childminders stopping.
Childminder	I'm limited by three under five but that suits me.
Childminder	No spaces available.
Childminder	Only so many spaces available because of ratios.
Childminder	I have no more spaces to offer.
Childminder	New babies in area seeking childminder.
Childminder	Unable to offer more spaces due to ratio restrictions.
Childminder	We get so many enquires that we have to turn people away regularly.
Childminder	Don't have spaces.
Childminder	I have more enquiries than I can offer places for and a small waiting list.
Childminder	I am full.
Childminder	Fridays and after 5pm.
Childminder	More demand than available spaces.
Childminder	We are getting daily enquiries for childcare under 5, however, we are full for children under five.
Childminder	Preschool children, parents looking for availability.
Childminder	Parents looking for places for under twos.
Childminder	Each day I turn away at least two families.
Childminder	Places are full.
Childminder	Don't want to go over my numbers.
Childminder	I chose to only have two children at a time.
Childminder	Number of spaces.
Childminder	Not enough spaces. Running a waiting list.
Childminder	Too many hours.

Day Nursery	We are full in the 2-3 room and Pre-school rooms.
Day Nursery	We usually have three plus applications each week for nursery places and have 0 places available until September 2024.
Day Nursery	We have a lot of children on our waiting list.
Day Nursery	It is hard to offer places to children as a lot are now claiming 30 hours funding, which takes up sessions previously available.
Day Nursery	We have no facilities for under twos.
Day Nursery	At capacity with a waiting list.
Day Nursery	We don't have enough spaces to accommodate the need for new parents.
Day Nursery	We are full with a waiting list and are turning people away daily wanting to enrol their child because of this.
Day Nursery	We have had enquires from parents whose children attend a nursery which has recently closed.
Day Nursery	Our waiting list is April 2024.
Day Nursery	This is temporary we have spaces from September, so we have a waiting list.
Day Nursery	Due to local nurseries closing we have been asked for places for pre-school children that we cannot provide.
Day Nursery	As currently full to work with staffing we have. I have had to turn away parents want places immediately from spring 2023.
Day Nursery	All rooms full on nearly all days so cannot offer additional days to current children. Some hours cannot be covered as difficulty finding staff that want to work past 3pm.
Day Nursery	There have been a few local nurseries which have closed down recently. This has resulted in a high demand for places which we cannot meet.
Day Nursery	Not enough staff.
Day Nursery	Space.
Day Nursery	We have children on a waiting list and although we have further registered places, we do not have the staff.
Day Nursery	We have a waiting list on certain days, and we cannot recruit qualified staff.
Day Nursery	Under twos.
Day Nursery	We have capped our numbers due to difficulty in recruiting. We are not working at full occupancy.
Day Nursery	Spaces for under twos.
Day Nursery	We are operating on a waiting list and taking bookings 18 - 24 months in advance of start date.
Day Nursery	a lot of demand for under twos spaces that we cannot cover due to recruitment issues.
Day Nursery	Funding does not meet the basic costs, therefore reducing places. Staff no longer want to work in this sector - reduces places.

Day Nursery	Although there are spaces available the demand is for more flexibility which is not always cost efficient in terms of staffing ratios.
Day Nursery	Lack of qualified staff.
Day Nursery	A few 2-year-old places required (few hours per week paid) that we cannot staff due to ratios. Takes away from 3/4-year-old staffing.
Day Nursery	We have a very long waiting list. We cannot get qualified staff in order to offer places to be safely in ratio. Therefore, we have no less than 10 at any one time on our waiting list.
Independent School nursery	We have no availability for under 2-year-olds, so have a waiting list in operation.
Maintained School Nursery Class	SEN provision.
Maintained School Nursery Class	Flexibility and high cost of paying teacher and Level 3.
Maintained School Nursery Class	We have had some movement but have been unable to meet the need at the time of request for some places.
Maintained School Nursery Class	2-year-old places.
Pre-school/Playgroup	We have 10 children who we cannot offer a place to at the moment and are on a waiting list for September.
Pre-school/Playgroup	We cannot provide anymore one to one/ shade and fade support due to staffing.
Pre-school/Playgroup	Enquires because of staffing can't take until summer term.
Pre-school/Playgroup	Only due to staffing. Getting qualified practitioners to apply for vacancies is proving difficult.
Pre-school/Playgroup	We have four children waiting for places on some days.
Pre-school/Playgroup	Waiting list for extra days etc.
Pre-school/Playgroup	Space and staff shortage.
Pre-school/Playgroup	We aren't offering wrap-around care.

**Appendix 5 – Provider audit comments regarding rationale for introducing staffing changes and the difference made (verbatim comments)**

Type of setting)	
Nursery class in academy school	We want to accommodate the needs of parents as much as we can.
Nursery class in academy school	Demand in local area and existing families within the Academy.
Nursery class in academy school	We have added a nursery classroom so we can now take more children. Increased fees due to an increase in running costs.
Childminder	I chose to work four days a week back in 2018, it is the only day I have free to do my paperwork, training days, voluntary work for other organisations as well as family appointments. I work 8am till 5.30pm the other days which works well for my family. I don't want to take on an assistant as I have seen a lot of negativity about it and don't want to risk having to constantly let families down if my assistant is unable to come or suddenly leaves. I haven't raised my costs and remain at £4.50 an hour. Everything is rising, times are hard for everyone and currently, £4.50 an hour pays for all my bills and outgoing costs so do not feel the need to have to raise them at the moment. I only take three weeks off a year, I did spend 12 years only taking two weeks off a year, but due to health issues, I have now started to take three weeks off a year. I am flexible with the days and times I offer and try to accommodate what parents want so do not feel I need to make any other changes at present.
Childminder	Fewer hours to start with to help children to settle back in childcare after being at home with parents.
Childminder	Trying to get a work life balance back after working flat out during the pandemic with no closure.
Childminder	Due to the cost of living, energy prices, food prices, fuel prices we have increased hourly rate.
Childminder	Had a parent require longer days so agreed to that. Put my prices up due to cost of living.
Childminder	Time to put up cost per hour.
Childminder	This will be my last year childminding.
Childminder	It was the right thing to do for me.
Childminder	Need time for personal appointments and self-care.
Childminder	Only doing school hours during term time. As want more work/life balance. Increase fees as hadn't put fees up for a few years. Feel much happier in job and feel it is more sustainable.
Childminder	To accommodate extra spaces for parent's needs.
Childminder	Working less days a week. Means I can help less people.
Childminder	Increased fees due to cost of living.
Childminder	Lots of parents changing jobs.
Childminder	I want to have less days childminding.

Childminder	To make it easier for my work life balance.
Childminder	We felt that we needed an extra week holiday.
Childminder	Change in circumstances. Unable to comment as new to the area.
Childminder	I worked all through the pandemic and so nothing changed for me.
Childminder	Cost of living has pushed the prices up, which has reflected in the prices I now charge.
Childminder	Two children needing more hours.
Childminder	I choose to work three days.
Childminder	Increased price to come in line with nearby settings. An overdue fee increase. Not due to Covid.
Childminder	To cover current ride in running costs.
Childminder	Given me a better quality of life/work balance.
Childminder	Cost of living increase and funding isn't enough.
Day Nursery	Fees need to keep up with minimum wages and the cost of living to remain sustainable as NEF funding is inadequate.
Day Nursery	Due to a large increase in costs and underfunding of funded places, we have increased fees by 6% this year. We need to increase fees by 10% but felt that parents would not be able to afford to pay more than a 6% increase in fees. We are using reserved funds to keep trading which will not last forever.
Day Nursery	We only have one Term-Time only member of staff, and we did a lot of research into our customers and found only 6% of our teacher parents (who we were really doing it for) actually chose TTO, the others chose Year-Round anyway, so we stopped offering it. Those who are on TTO we will honour until they finish their time with us. It's better in terms of staff efficiency and - of course - financially.
Day Nursery	Days shortened to 4:30 finish (from 5:30) due to lack of demand. Increase in fees due to rising costs that are not covered due to more children taking 30 hours and NEF paying only half our normal hourly rate.
Day Nursery	We have decreased hours because it wasn't viable with the numbers we had, and we have had to increase fees. There doesn't seem to be a demand for longer hours at present. Increase in fees helped slightly. Cut our holiday club days if not viable.
Day Nursery	Opened a new baby unit on same site due to demand. Now open 51 weeks due to demand.
Day Nursery	Have changed our closing time from 6pm to 5pm due to no demand for this. We have reduced our staffing ratios of 1:6 in our pre-school rooms, to the statutory ratios of 1:8 due to not being able to recruit staff but also to save money. We have also increased our fees twice in the last 12 months to try to remain sustainable as for the first time in 20+ years we are running at a loss of approx. £8000 per month.
Day Nursery	We have increased fees due to costs increasing.



Day Nursery	There is a recruitment crisis within early years and so we have tried to make quieter classrooms and pay staff more so they have a better work life balance and we retain them. Since Covid-19 many staff work four long days instead of five varied days.
Day Nursery	We are now open 51 weeks a year as the demand was there for parents over the Christmas period when we had originally closed. Fees have had to go up due to rising prices of everything including the staff wages.
Day Nursery	We restructured to remain viable as salary outgoings was higher than incomings.
Day Nursery	We increased fees due to being one of the lower fee nurseries in Hereford and wanted to get in line with other settings and also rising costs.
Day Nursery	The cost-of-living crisis and the extra costs incurred during covid.
Day Nursery	I employed more staff to enable us to cater for the full 40 place capacity.
Day Nursery	Lack of demand for later finish.
Day Nursery	Expanding nursery floor space to be able to take more 2.5 year olds. New nursery manger appointed.
Day Nursery	Increased staffing has enabled us to support the children more as their needs are much bigger since Covid and we have a higher level of SEN.
Day Nursery	Increase to fees takes place annually to meet increased costs.
Day Nursery	We already offered what our families required, flexibility.
Day Nursery	Inability to recruit trained staff.
Day Nursery	Increased demand for places and fees increased annually.
Day Nursery	Due to insufficient NEF funding compared to cost-of-living crisis, wages, pensions, Ni contributions, heating and lighting.
Day Nursery	Business decision to sustain the nursery.
Day Nursery	We increased our fees due to the cost of living, training costs and the minimum wage increasing.
Day Nursery	Increase in min wage not covered by NEF. Increased living costs of families means they are trying to reduce their outgoings and their pay rises are not keeping pace with increasing fees. Parents not finding returning to work viable as the cost of childcare outweighs the financial benefit of working before a child becomes eligible for the 30hours NEF. Some parents who historically were eligible for 2 year NEF, with a previous child, are no longer as income has increased but threshold for eligibility has not. The increased staffing costs and rising utility costs impact on our ability to offer additional spaces when needed and as we can respond to rising demand less quickly. Shortages of good quality staff, who are prepared to work for living wage, impact on the service we are able to offer.
Day Nursery	Due to carrying out surveys and meeting the needs of my families.
Day Nursery	Increased demand - able to offer more spaces when successful recruitment allows.
Day Nursery	increased fees due to the cost of living and changes to funding to try and meet the needs of the parents.

Day Nursery	We have gone from closing at 5.30 to 4.30 as low demand after school.
Day Nursery	Funding does not meet the basic opening costs; staffing has had to be changed to meet ratios.
Day Nursery	Increased prices by 25p per hour for those paying to help with increased costs to us. Have employed temporary agency staff to help with ratio numbers.
Day Nursery	We are able to offer a full range of services to our rural families, all year round, and the under two registration gives rural families the support they need to return to work. We recognise our setting is unique and would like to see other similar settings so that our practice can be the best we can offer.
Independent School nursery	Form stronger relationships with children. Easier to staff nursery. More consistency for children and staff throughout the week.
Independent School nursery	We had two staff on temporary contracts, and these were not renewed due to decreased pupil numbers for 22/23.
Maintained School Nursery Class	We now provide more wrap around care and are open in the holidays.
Maintained School Nursery Class	Increased staffing due to allocation of EY inclusion funding and needs of the children. Fees have been increased in line with other local nurseries. These fees have not previously increased in eight years. Increased income to help support increased cost of living. Increased support from private speech and language practitioner due to demands of cohort.
Maintained School Nursery Class	Nursery is now term time only.
Maintained School Nursery Class	We had to reduce our days because of our decreased numbers.
Maintained School Nursery Class	To enable children to travel on bus into school we start at 8.30 rather than 9am.
Maintained School Nursery Class	Opened new building for 2-year-olds and rearranged staffing around this. Also, another Nursery in the village has closed.
Maintained School Nursery Class	Although needs for spaces have increased it is not enough to warrant any significant change.
Maintained School Nursery Class	Parents prefer to use entitled hours flexibly.
Maintained School Nursery Class	Reduce cost for parents' affordability.
Maintained School Nursery Class	We have opened our own Governor Run Nursery class on 27 February 2023.
Maintained School Nursery Class	Fewer 2-year-old places due to staffing and needs of children
Maintained School Nursery Class	Decrease in demand has affected the budget but this has been largely due to other schools in our locality offering two year old provision and so children have generally remained within that setting rather than joining us as aged three.
Pre-school/Playgroup	Our costs for food, resources etc have increased, staff wages have increased, NEF doesn't cover our fees, therefore our fees needed to rise.

Pre-school/Playgroup	We have started to take children under two due to lack of demand for places for 3–4-year-olds and parents asking if we could provide it. This has reduced the number of children we can take as they require a separate room and less child to adult ratio. We have struggled to recruit appropriate staff.
Pre-school/Playgroup	We have lower numbers of children on role and an increase in SEND children. Less staff availability.
Pre-school/Playgroup	As we were over staffed with less parents paying for additional hours. Therefore, staff have lost hours currently.
Pre-school/Playgroup	Increased fees because of having higher running costs as well staff wages increasing and funding money being quite low.
Pre-school/Playgroup	Increased rent by 50% increased wages bills increased heating and food bills just to make ends meet.
Pre-school/Playgroup	Due to the increase in living costs. Energy bills, cost of food for snack has increased and the minimum wage increases. It also helps to offset the lower funding fees we receive.
Pre-school/Playgroup	More staff to accommodate increased numbers.
Pre-school/Playgroup	Taken on an extra member of staff. Improved child to staff ratios.
Pre-school/Playgroup	High demand.
Pre-school/Playgroup	Decrease in demand for places, currently closed on a Thursday as no demand.
Pre-school/Playgroup	As we had not put our fees up for a few years and losing thousands of pounds due to the pandemic we are trying to find ways to keep the setting going without affecting the families that we are targeted for, those on low incomes etc.
Pre-school/Playgroup	Less income.
Pre-school/Playgroup	It has helped slightly but risk of losing staff due to reducing staff hours. Concern over finances with National Minimum Wage increase.
Pre-school/Playgroup	We have a new, larger building and recruited another member of pre-school staff to allow for more children to join.
Pre-school/Playgroup	Increased fees and change of management.

**Appendix 6 – Provider audit comments regarding staff changes (verbatim comments)**

Type of setting	Staff changes made
Nursery class in academy school	New Nursery supervisor and new nursery apprentice. Head of School assigned as EYFS Lead and oversees nursery.
Nursery class in academy school	More staffed need due to an additional nursery room.
Nursery class in academy school	Replacing two Level 3 members of staff, when they chose to leave, and employing a temporary member of staff to cover shorter working hours of one of these.
Nursery class in academy school	More part time staff following resignation of existing team members.
Nursery class in academy school	Additional unqualified member added.
Nursery class in academy school	New recruitment of EY practitioners.
Childminder	Increased to meet demand.
Childminder	My husband became my childminding assistant.
Day Nursery	We have increased our staff numbers as we have got busier.
Day Nursery	We now have unqualified 'Support Staff' who work less hours per week, bringing life skills to the team (e.g., love of gardening, love of stories etc), as an added extra.
Day Nursery	We had to make three staff redundant at the end of covid restrictions.
Day Nursery	New staff due to part time basis roles.
Day Nursery	Increase in numbers of staff and some change over.
Day Nursery	Staff have left on their own accord.
Day Nursery	Approx 80% of our staff resigned during or after Covid to pursue careers outside of early years due to the poor wage and huge responsibility but also the lack of resources and support we receive the LA and Government in general.
Day Nursery	Employed two staff members to replace staff who left.
Day Nursery	As above, many staff work four long days instead of five varied shifts. We have introduced much more staff mental health support and a higher pay scale.
Day Nursery	We restructured in 2021 to remain viable.
Day Nursery	Only due to staff taking jobs elsewhere and a change around with relief staff using (some left, some employed).
Day Nursery	Yes, I have two new deputies due to maternity leave.
Day Nursery	More staff.
Day Nursery	Additional staff to increase ratio due to children with SEND and SENCO is full time whereas previously the post holder worked two days a week term time.
Day Nursery	Reduction in staff returning to childcare after Covid.
Day Nursery	Taken on apprentice due to maternity leave.
Day Nursery	Staff leaving and being replaced.
Day Nursery	We have had to have at least one member of staff available to cover absences due to increased staff illness. Staff nearing retirement age decided to leave the sector post lockdown restrictions. Five members of staff have taken maternity leave since restrictions were lifted.

Day Nursery	We have recruited more full-time staff.
Day Nursery	Long term staff left the sector so had to recruit new staff to cover the gaps.
Day Nursery	Less staff as left the industry.
Day Nursery	I retired - Covid finished me. All old and existing staff left. Building new team.
Day Nursery	Old team have left under new management as not meeting expectations.
Day Nursery	One member left; we were unable to replace so have used supply agency.
Day Nursery	TUPEd staff from the previous private provider, employed a nursery administrator, a nursery lead and deputy manager, an EYFS lead, PE coaches etc.
Independent School nursery	As above temporary contracts not renewed due to lower numbers.
Maintained School Nursery Class	More staff needed as numbers increased and more SEN children.
Maintained School Nursery Class	Employed fixed term SENTA to support children with additional needs from EY inclusion funding.
Maintained School Nursery Class	One member of staff did not return after Covid due to being extremely vulnerable and one member of staff left to pursue an alternative career.
Maintained School Nursery Class	Another temporary Teacher and Nursery Nurse.
Maintained School Nursery Class	Qualified Teacher now leading Nursery Setting.
Maintained School Nursery Class	Employed three new staff members and lost two staff.
Maintained School Nursery Class	Extra member of staff to support those with additional needs.
Maintained School Nursery Class	Moved Nursery in with Reception to create teacher-led unit.
Maintained School Nursery Class	Additional staff recruited.
Maintained School Nursery Class	Additional member of staff.
Maintained School Nursery Class	New staff for opening our new Governor Run Nursery when the private company who were already using the room closed.
Maintained School Nursery Class	1:1 support needed for some children.
Maintained School Nursery Class	One new teacher, three apprentices.
Pre-school/Playgroup	The manager left so I replaced her and we employed another member of staff to cover a practitioner who left to study a degree.
Pre-school/Playgroup	Two members of senior staff retired and two part time staff decided not to return. We had started the recruitment process before lockdown for a new manager and senior practitioner who started in September 2021. We have needed to recruit this year due to increasing numbers and have had very few applicants. We have taken on an apprentice and two further members of staff. Our office admin has a BEd in Primary education and Mphil in applied social studies. these qualifications were not on the list supplied by the government so I contacted the DfE who advised me I could use her as a Level 2!
Pre-school/Playgroup	We have employed a new deputy manager.

Pre-school/Playgroup	Added an additional member of staff who started as an apprentice, now a qualified Level 2.
Pre-school/Playgroup	New staff.
Pre-school/Playgroup	Increased staffing to accommodate increased numbers.
Pre-school/Playgroup	Manager left and taken on an apprentice.
Pre-school/Playgroup	Employed two new assistants.
Pre-school/Playgroup	Not replacing staff who left.
Pre-school/Playgroup	Hours have decreased as low in numbers of children.
Pre-school/Playgroup	Reduced hours.
Pre-school/Playgroup	This September had to dramatically reduce staff hours.
Pre-school/Playgroup	We have employed one qualified teacher and one Level 3 qualified member of staff. Both full time.
Pre-school/Playgroup	Change of management (maternity cover), 3 new staff.
Pre-school/Playgroup	Three new members of staff, two left.

**Appendix 7 – Provider audit comments regarding staffing issues (verbatim comments)**

Type of setting	Staffing issues
Nursery class in academy school	Filling vacancies has been challenging at times.
Nursery class in academy school	Only 1 applicant for a recent post. 1:1 support staff limited and without relevant training.
Nursery class in academy school	Difficulty recruiting suitably qualified staff.
Childminder	I don't employ staff but I know it's a fact, getting staff and holding on to them is hard.
Childminder	Limited trained staff available.
Day Nursery	It is difficult to attain qualified and experienced early years staff.
Day Nursery	Extremely difficult to recruit full and relevant Level 3 qualified staff. We have had to significantly increase our rates of pay to attract applicants (usually from other settings).
Day Nursery	The major problem is that staff wish to work shorter hours. Also, the newly qualified staff often have rather high opinions of their skills but we feel they are still weak in terms of practice.
Day Nursery	We have been trying to recruit qualified staff but this is proving to be difficult due to lack of fully trained staff. Staff sickness is virtually impossible to cover as we are working to ratio at all times. We have taken on apprentices but find many leave their courses early as they are online based and there is no face-to-face support, which is found when students attend college/ local training centres. Existing staff are finding CPD to be difficult as there are no local services for them to access and training costs tend to be overpriced. We offer online training for all our staff, via Flick Training, and other in-house training.
Day Nursery	Not having qualified staff applying when advertising jobs and only a couple with relevant qualifications applying. Maybe minimum wage putting them off.
Day Nursery	We are one staff member short. There are only three of us, so we are very vulnerable. We have advertised but only one unqualified person applied. She was offered the job but had not taken up the offer.
Day Nursery	Staffing absence cover.
Day Nursery	We simply cannot recruit!
Day Nursery	There are very few Level 3 staff and above. We have had to invest highly in recruiting lower-level staff and putting them through training. Due to OFSTED ratios on the number of qualified staff, we have had to keep a close eye on ensuring we are always covering our ratios. This is something we have never had to do. We have always been mostly Level 3 and Degree level staff. But we have lost most of our degree level staff to school employment, or they have changed career paths.

Day Nursery	We have been looking for new apprentices and have had adverts out but often people don't even show up for interviews or trial days.
Day Nursery	Lack of applicants. Applicants not having relevant qualification.
Day Nursery	Lack of face-to-face training.
Day Nursery	When a permanent staff member left, and the position was put out to public had one applicant only. Again, when put position for relief staff only had two apply. This has never been an issue before, I usually have more than enough applicants to interview.
Day Nursery	Very few applicants when you advertise, level of qualifications, hours that they want to work, enthusiasm, ability to play!
Day Nursery	We are unable to recruit bank staff which means that qualified staff who work in the office have to cover staff absences/holidays. This has a knock-on effect to the day to day running of the nursery. It has also become increasingly difficult to recruit highly qualified, experienced staff for permanent positions.
Day Nursery	Struggling to find new staff as no one wants to work.
Day Nursery	Unable to accept more children due to lack of staff and ratio.
Day Nursery	No applicants for new roles and no one has relevant qualifications.
Day Nursery	Quality of applicants, including candidates with full and relevant qualifications who do not possess the basic skills and knowledge to carry out the role.
Day Nursery	Retention of staff, recruiting qualified staff.
Day Nursery	Lack of qualified and experienced applicants. I would like to be able to employ unqualified but competent staff who we can train.
Day Nursery	I am not now, but struggled to find an apprentice and went this route as it was impossible to recruit a qualified staff member for the maternity cover.
Day Nursery	Recruiting full time staff.
Day Nursery	The candidates applying lack experience and appropriate childcare training. Most candidates applying have no relevant qualifications and very little experience. We believe that people are opting to take an apprenticeship which is paid rather than going to college, therefore we have more Level 2's applying.
Day Nursery	Staff choosing to leave the sector. Staff not prepared to upskill where issues are identified. Staff not demonstrating the core skills their level of qualification would imply. Ability of staff to work independently.
Day Nursery	Finding qualified Level 3 staff.
Day Nursery	Yes - we struggle to find applicants with the required experience and qualifications.
Day Nursery	Recruitment of quality trained staff.
Day Nursery	Staff show a preference for part time.
Day Nursery	Staff leaving the nursery after being there a long-time taking knowledge and experience, can't replace that.
Day Nursery	Lack of qualified staff.
Day Nursery	Lack of qualified staff - see comments in previous audit for [deleted].
Day Nursery	No applicants for vacancies barely.



Day Nursery	Recruitment.
Independent School nursery	We have issues with applicants applying for Nursery Practitioners. It is very rare that qualified and experienced early years practitioners apply. We are also beginning to have problems with staff retention, as some staff are leaving the profession completely. There is also no availability to call on agency staff at very short notice due to our rural location.
Independent School nursery	We had few applicants for a post.
Maintained School Nursery Class	Not many applications when we advertise for a member of staff.
Maintained School Nursery Class	Lack of people available to work.
Maintained School Nursery Class	Recruitment of TAs, potentially due to poor pay.
Maintained School Nursery Class	Struggle to recruit.
Maintained School Nursery Class	Lack of quality applicant and low number of applicants.
Maintained School Nursery Class	There does not seem to be the people out there and those that there are, often have basic qualifications and need a lot of guidance and support.
Maintained School Nursery Class	Lack of staff with relevant experience applying for posts. Increase demand for staff supporting additional needs.
Maintained School Nursery Class	Lack of experience.
Maintained School Nursery Class	Recruitment of staff with correct qualifications.
Pre-school/Playgroup	We have experienced lots of absence due to staff illness or their children being ill and staff needing to stay home to look after them.
Pre-school/playgroup	I think we will struggle to increase senior staff wages in line with staff currently on minimum wage. This will mean that the extra responsibilities senior staff have will not be recognised financially. I am trying to encourage staff to complete Level 3 and above training but if they are only going to receive 10p an hour more they quite rightly wonder what the point is. Financing staff training and having enough staff to cover. Staff can earn more stacking shelves in a supermarket, and I worry that as financial pressures increase if they will choose to leave the profession.

Pre-school/Playgroup	We have one member of staff on maternity, two staff recovering from sickness, so we now have one temporary assistant.
Pre-school/Playgroup	Though no issues currently for us, the struggle with finances has become a real issue with some staff members taking on additional jobs. Unless we can address this there will be future issues.
Pre-school/Playgroup	We have previously recruited for maternity cover. Applicants have limited or no qualifications. Those with qualifications have no passion for the job they're in.
Pre-school/Playgroup	Quality of applicants.
Pre-school/Playgroup	We advertised for a preschool practitioner to join our team and had minimal interest and those that did get in touch were unqualified. Luckily, we have filled this position but it took some time to find an appropriate candidate. Agency workers are difficult and expensive to use too.
Pre-school/Playgroup	Not many applicants when recruiting. Lack of candidates with Level 3 qualification. We have resorted to apprenticeships for several years now.
Pre-school/Playgroup	Lack of qualified applicants.
Pre-school/Playgroup	Had trouble recruiting new manager but fortunately this has now been resolved.
Pre-school/Playgroup	We are low in staff numbers we would like another member.
Pre-school/Playgroup	Last week two staff resigned for different reasons. Concerns over future recruitment and therefore future of Pre-school.
Pre-school/Playgroup	Currently not but it took a lot of time to find suitable candidates.
Pre-school/Playgroup	Have had a couple of staffing issues in the past couple of months however these are no longer an issue.
Pre-school/Playgroup	Cannot recruit much needed member of staff.
Pre-school/Playgroup	Staff just don't meet the standard I expect they have no experience in teaching nor understanding.
Pre-school/Playgroup	Recruiting qualified staff is difficult.

**Appendix 8 – Provider audit comments regarding support for staffing issues (verbatim comments)**

Type of setting	
Nursery class in academy school	Better pay and incentive for people to work within the industry. Accessible training. Ability to train at work while in ratio.
Childminder	A Government subsidised system or at least supported childcare.
Childminder	Support with training to support learning needs.
Day Nursery	Level 2 and 3 courses that are not apprenticeships.
Day Nursery	A large increase in funding from the Government for funded hours would allow settings to increase rates of pay. This would attract more people into the sector however, it will not be a quick fix as people will need to train and qualify first.
Day Nursery	Further training opportunities: we of course pay for them to do CPD but often they lack practical skills - and a lot of training focuses on theoretical (E.g., behaviour management).
Day Nursery	Access to local CPD for existing staff, at affordable prices. Local Authority to offer childcare qualification training. Local incentives for young people to enrol on childcare courses, with face-to-face training and communication with nursery settings.
Day Nursery	We can only afford to pay staff minimum wage.
Day Nursery	Enticing young people to want to join the profession. If staff are trained to degree status the money is not enough to keep them there.
Day Nursery	More frequent, inspiring and diverse Hereford based training opportunities.
Day Nursery	It would appear that people simply don't want to work in Early Years anymore due to all of the reasons above, so I'm not sure what support could be provided to help this.
Day Nursery	I think the Government could make it easier to create a pathway into Early Years qualifications with shorter timescales on training completion and free courses. We have many applicants who have qualifications in Health and Social Care or have many A-levels but we cannot count them in ratio as qualified. A short top up course (under a year) would benefit employers to fast track their qualifications.
Day Nursery	More recognition of the importance and hard work of qualified early years staff.
Day Nursery	More face-to-face training.
Day Nursery	At the moment I just about manage with the staff I have. The only issue is to get more applicants at interview, but not sure how that would be done!
Day Nursery	Training for new staff on the basics. Ways of retraining quickly TA's to be able to work in Early Years.

Day Nursery	If we were paid more for funded hours from the Government, we would be able to offer a more competitive wage for prospective employees which might attract the quality of staff we require.
Day Nursery	I don't think there is a solution to people not wanting to work. But it would help if we were able to pay better wages.
Day Nursery	Higher wages, no one wants to work in childcare because of the low salaries.
Day Nursery	The Local Authority team liaising with initial training providers over basic requirements to be included in initial training.
Day Nursery	Better training and a government incentive for younger staff.
Day Nursery	The issue is nationwide. You could be petitioning central Government. You could be offering specific baby training.
Day Nursery	Schools and sixth forms being brought inline to support Level 3 childcare training, more training for these courses offered free to mature students and advertising of such training.
Day Nursery	To support early years settings with apprenticeships. In short to help us with recruiting unqualified or Level 2's that need to obtain their Level 3. Although there are funded apprenticeships the staff need off the job hours and they need mentoring closely which puts pressure on our staffing and finances. Looking at the uptake of places for childcare courses in the local colleges. Is there a way that childcare can be made more appealing to young people? More financial support generally for nurseries to help us to offer a more appealing package to encourage qualified staff to take up positions in early years settings.
Day Nursery	Ability to offer an acceptable rate of pay to those taking on supervisory roles.
Day Nursery	I am now trying to train staff taking on apprentices. It would help if settings could have more allocation of apprentice places rather than just 10. This would allow us to train more staff and increase the early years work force.
Day Nursery	Better training available and support from the local early years team to help with effective training to recruit staff.
Day Nursery	Help providing good quality leadership training.
Day Nursery	More funding so that the staff can be paid a real living wage which may encourage them to stay in the sector and not go and work at Tesco's for more money.
Day Nursery	Support advertising or promoting a job in the wider community or area.
Independent School nursery	Provide a Herefordshire Early Years Bank staff agency.
Independent School nursery	Higher pay for EYFS practitioners!
Maintained School Nursery Class	More opportunities for people to access Level 2 training - especially targeted towards parents who may be thinking of starting a new career after having children.
Maintained School Nursery Class	Just people available to work.

Maintained School Nursery Class	Better pay and consistent hours rather than dropping to half their hours each year.
Maintained School Nursery Class	Not sure, I think less people are training in this area, we have seen a reduction in students that come into school from the colleges.
Maintained School Nursery Class	Local training for staff is hard to find.
Maintained School Nursery Class	Training for SEND specific support for increasingly complex needs.
Pre-school/Playgroup	Training in phonics, small group work, writing development summaries and SMART targets.
Pre-school/Playgroup	Early years practitioners are feeling undervalued and overwhelmed by the responsibilities and expectations put upon them by the Government. We are underpaid and struggling in a cost-of-living crisis. Our work load is growing as we are expected to support our families and children in so many ways now safeguarding, SEND, education and care, Early help (chat) alongside endless training courses.
Pre-school/Playgroup	Additional funding within early year sector.
Pre-school/Playgroup	Being in a better position as a business i.e., more funding making us able to pay staff a reasonable wage that they can live off.
Pre-school/Playgroup	We need to be able to pay our staff more and deserve more stress levels are high at moment.
Pre-school/Playgroup	It is difficult, the sector is not paid well, due to the money not being there. We also have a lot of responsibility to provide for families.
Pre-school/Playgroup	More trained candidates available. Better incentives, i.e., pay!
Pre-school/Playgroup	Increase in wages.
Pre-school/Playgroup	More funding to increase wages.
Pre-school/Playgroup	Better qualifications and a review of how they are taught.

**Appendix 9 – Provider audit final comments (verbatim comments)**

<b>Type of setting</b>	<b>Comments relating to demand</b>
Nursery class in academy school	Since opening we have doubled the numbers within pre-school with growing demand.
Childminder	There is insufficient childcare in Hereford. Parents are crying out for support and there are not enough childminders left to provide it and we have now lost three nurseries. Something needs to be done, whether the council considers opening nurseries that are LA maintained to give the boost to the County. We run the risk of parents becoming desperate and turning to people that aren't qualified, insured or experienced to look after their child/ren and this in turn could lead to major safeguarding issues. Ofsted also need to come together and sing off the same page. It is incredibly demoralising for schools, nurseries and childminders to have such inconsistencies from them when being inspected as well as an incredibly stressful and worrying time before inspections. One childminder could be graded as good/outstanding and another childminder could be doing the same thing and marked as inadequate because of the difference in inspectors. Ratios is the major area of concern when it comes to childminders and the one that no one seems to have a definite answer to when applying the variations rule.
<b>Type of setting</b>	<b>Comments relating to financial sustainability and early years funding</b>
Childminder	Without my husband's work it would not be financially beneficial to do my job.
Childminder	The NEF funding rate is too low. It does not cover the cost of my sessions. I ask each parent for voluntary contributions which they all pay thank goodness. They are always surprised that the funding doesn't cover my fees. It should not be called free funding by the Government. If I didn't ask the parents for a contribution, then I would be subsidising it from my income. Often parents claiming it are on a higher income than me.
Childminder	NEF funding not covering the fees is an ongoing financial issue.
Childminder	The word free needs to be changed to funded for NEF information and providers need to be able to charge a top up to meet costs of providing these spaces.
Day Nursery	I have owned [Deleted] since the nursery opened over 20 years ago and these last few years have been the hardest, most stressful years by far. It is becoming extremely difficult to remain financially viable and I am seriously considering leaving the sector.
Day Nursery	We find with nursery funding that providing estimates as early as July does not provide a true picture of the children that will access funding in the following September, and we struggle to sustain the nursery from September to December due to the actual funded children attending compared to the payments based on early estimates. It would be of benefit if headcounts could be earlier in the Autumn term, and the payments adjusted accordingly.

Day Nursery	The demand for what we are expected to deliver has increased yet NEF funding does not allow us to continue to offer this level of support, the only way to close the staffing gap is to ensure early years employees are paid fairly.
Day Nursery	Despite advertising high salaries for our practitioners, we are still unable to recruit. Although recruitment is a national wide issue in all sectors not just childcare, it is this single most problem that is affecting our viability as without staff we cannot offer places and without places being sold we cannot raise income to continue to pay existing staff. We are currently considering changing our childcare offer to meet the needs of the staff available rather than the parents and children needs which is catastrophic. The NEG funding does not meet anywhere near the cost of running a high-quality setting and paying EYT and degree graduate staff. We have to charge huge fees to make the books balance. The removal of the word FREE NEG entitlement would help as the parents would not have such high expectations about receiving free childcare from a high-quality setting. It is really tough out here at the moment, qualified staff applying for jobs would greatly take the pressure off my team. Thanks for listening!
Maintained School Nursery Class	Our nursery is part of a foundation class, this is why it is sustainable. However, we struggle to fund resources, replenish equipment due to budgets.
Pre-school/Playgroup	We are lucky to have sufficient funds in the bank to cover the loss we made last year however we cannot afford to do this again. Finance is a big worry with the minimum wage being raised by 9.7% and the funding rate not increasing in line with this. Staffing is our biggest expenditure. We will have to increase the rate we charge not only in line with the increase in minimum wage but also to cover the lack of funding.
Pre-school/Playgroup	Though we are currently maintaining the setting, the increase in minimum wages is going to severely impact us. Will also affect morale, if staff are now receiving only minimal wage when they are worth so much more!
Pre-school/Playgroup	We desperately need increased levels of funding as we have an in-year deficit this year.
Pre-school/Playgroup	Due to the COVID pandemic and still having to pay rent, wages, utility bills etc., we made a great loss which we will never be able to recuperate back. Even though COVID has finished we are still struggling to make things meet.
Pre-school/Playgroup	Government funding is inadequate especially with minimum wage increasing.
<b>Type of setting</b>	<b>Comments relating to support - received or needed</b>
Childminder	Deborah Ball is always available and provides fantastic support to childminders.
Day Nursery	Our local authority has been great, especially through Covid-19. However, they cannot give any business advice or support and this can make settings feel isolated. We have been able to communicate well with other settings to support each other but there is little support for private settings who are struggling to stay solvent.

Day Nursery	I am very lucky that I have an excellent staff team but we are all getting very tired and in need of a county wide boost to the sector to revitalise everyone.
Day Nursery	As an early years setting in Herefordshire, we feel very unsupported with current issues such as very low paid funding, staff recruitment and the cost of living crisis. It is very sad that at least three of our local settings have closed down very recently and wonder what the local authority are going to do to support and ensure the sustainability of our settings for the future?
Day Nursery	Personally, our main concern that will impact on us, (as it has in the past also) are Herefordshire Council decisions of future changes to our immediate location, lack of appreciation of how hard we work for our children in Herefordshire from Herefordshire Council (as they see schools more important when actually in fact the early years is the most important time in a child's life and lack of funding from Government.
Independent School nursery	EYFS staff need more recognition for the trend plus work they do and support for staff wellbeing and work life balance needs to be addressed.
Maintained School Nursery Class	Thank you for your continued support.
Pre-school/Playgroup	While we do appreciate the emails from all of the above lists, sometimes there are too many, which makes more work for managers. Could really do with a decrease in our paperwork. Training is always beneficial if it is relevant.
<b>Setting type</b>	<b>Comments relating to the setting</b>
Childminder	Hopefully will be able to give a more comprehensive account next year. Apologies.
Day Nursery	Because we are a governor run nursery the school supports nursery with some costs so overheads are low. Also supported by extended day provision. Finance means payments etc aren't as pressured.
Day Nursery	I think my setting is lucky as we are part of [Deleted]so we also have financial backing support from the college if needed.
Independent School nursery	In 2021 the school and nursery were taken over by a company and we are now part of a 20 Independent School group.
Maintained School Nursery Class	The previous private company closed on 21 February and we have opened our Governor Run school Nursery on 27 February. The numbers are low but we hope that they will pick up over time and therefore it will be a more positive picture. We have answered these questions to the best of our ability, but we have only been open a week and it is hard to answer some questions on the impact over time. Please let us know if you need any more information from us. Thank you.



## Appendix 10 – different types of childcare

- **Childminders** look after children in their own homes (and can operate from non-domestic premises for some of the time). They offer a flexible service for children of all ages.
- **Day nurseries** can be run by private individuals, community groups, commercial businesses or employers, offering care for children from birth to five years old. Day nurseries usually offer daycare between 7.30/8am and 6pm for most weeks of the year.
- **Pre-schools and playgroups** offer care to children in their local community, as morning or afternoon sessions, or as extended sessions including lunch, usually during term-time. They are often run by voluntary groups but can be run by private individuals.
- **Nursery classes in maintained schools** offer early years provision for children, starting from two years old until the child enters a reception class in school. Provision is usually term-time only and during school hours.
- **Nursery provision in Independent Schools** is childcare provision for children from two or three years until they reach statutory school age. Independent schools are privately owned.