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**Royal Borough of
Windsor and
Maidenhead
30 Hours Childcare
themed
Childcare Sufficiency
Assessment
2018**

Contents

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Key Findings

Demographic Factors affecting the early years childcare market

1 In 2018, the highest number of resident 2 year olds are evidently living in the following three (neighbouring) wards of Maidenhead:

- Belmont ward
- Oldfield ward
- Boyn Hill ward

The highest number of 3 – 4 year olds are also evidently resident in the above three wards (with Belmont ward and Oldfield ward accounting for discernible pockets of deprivation) and the highest birth rates for the period 2014 – 2015 were record in the three same ward.

2 In 2018, the highest number of resident 5 – 11 year olds are also evidently living in the following three (neighbouring) wards of Maidenhead:

- Belmont ward
- Oldfield ward
- Boyn Hill ward

However, the highest number of 12 – 16 year olds are evidently resident in the following three wards:

- Belmont ward, the neighbouring
- Furze Platt ward, and
- Eton and Castle ward

3 As was concluded in the Royal Borough of Windsor and Maidenhead's 2016 Childcare Sufficiency Assessment, the resident population of older children aged 12 – 16 years is (still) forecast to increase at a greater rate than the population of young children.

However, the resident population of children aged 3 – 4 years is projected to marginally increase – during the period 2018 – 2025 – as is the resident population of children aged 2 year olds.

4 Five (Windsor locality) wards account for the evident highest frequency of adults in employment, i.e. it can be assumed working families – i.e.:

- Castle Without ward
- Clewer East ward

- Old Windsor ward
- Eton and Castle ward
- Clewer North ward

- 5 As with the 2016 Childcare Sufficiency Assessment, the Oldfield ward in Maidenhead is set to account for a relatively high incidence of construction of new housing/dwellings. In summer 2018, plans were finalised (through the selection of a developer) to create new homes and facilities as part of the Maidenhead Golf Club site. Critically, the development is expected to yield approximately 2,000 new dwellings.

A new primary and secondary school is expected to be established to help accommodate the educational needs of the families that eventually occupy the new dwellings and it can therefore be assumed that (new) daycare facilities/childcare places will also be required in order to meet an increased localised demand for such provision.

Key Findings from the Childcare Providers Survey

- 6 55% of responding early years childcare providers stated that they had a waiting list in summer 2018, most frequently for the 0 – 12 months age group (where the average number per waiting list was 5 children), followed by the 2 years age group (where the average number per waiting list was 4).

Additionally, 13% of registered childminders stated that they had a waiting list – once again most frequently for the 2 years age group (where the average number per waiting list was again 4).

- 7 The 2018 Childcare Sufficiency Assessment's Providers Survey highlighted that since 2016 (and that year's previously published CSA) the *average* hourly fees within the PVI early years childcare sector had increased by approximately 0.60p/hour. However, the average hourly fees charged by registered childminders had remained static at approximately £5.70/hour.

- 8 All *responding* early years childcare providers (i.e. PVI sector day nurseries and maintained school nursery classes) were invited to state whether they were offering 30 hours childcare places at their setting in summer 2018. 78% of such respondents stated that they were and 22% of such respondents stated that they were not.

The three wards which evidently accounted for the *highest* number of 3 and 4 year olds on roll and occupying 30 hours childcare offer places within early years childcare sector settings in summer 2018 were (situated in the Maidenhead vicinity and were):

- Oldfield
- Boyn Hill
- Hurley and Walthams

- 9 All *responding* registered childminders were invited to state whether they were offering 30 hours childcare places at their setting in summer 2018. 43% of such respondents/individuals stated that they were and 57% of such respondents stated that they were not.

0 *responding* registered childminders were providing 30 hours childcare offer places or envisaged that they would be introducing additional 30 hours childcare places for the period 2018 – 2019 in the following (predominantly western locality of the Royal Borough) wards:

- Ascot & Cheapside
- Datchet
- Eton Castle
- Eton Wick
- Horton and Wraysbury

- 10 Three wards – two of which are situated within the Ascot vicinity – accounted for the highest number of vacant 30 hours childcare offer places in summer 2018, reported by both responding/applicable early years childcare providers *and* registered childminders:

- Sunningdale
- Ascot and Cheapside
- Castle Without

- 11 Early years childcare providers were requested to state whether – in summer 2018 – they were able to meet the demand that they were experiencing for 30 hours childcare places. There were eight wards where two or more responding early years childcare providers stated: *No – we are not able to meet demand*. These were:

- Ascot and Cheapside – stated by 3 responding early years childcare providers
- Oldfield – also stated, in fact by 3 responding early years childcare providers
- Bisham and Cookham
- Boyn Hill
- Bray
- Hurley and Walthams
- Old Windsor
- Castle Without

- 12 The most frequent feature/element of the 30 hours childcare offer that early years childcare providers considered that they would (still) benefit from

(more/continued) information about was: understanding the eligibility criteria, followed in frequency by: accessing or using the government's eligibility checker.

The most frequent feature/element of the 30 hours childcare offer that registered childminders considered that they would (still) benefit from (more/continued) information about was: (them) understanding the eligibility criteria, followed in frequency by: developing partnership arrangements.

- 13 The most frequent feature/element of the 30 hours childcare offer that early years childcare providers considered that their parents would (still) benefit from (more/continued) information about was: understanding the eligibility criteria, followed in frequency by: reconfirming eligibility (every 3 months).

The most frequent feature/element of the 30 hours childcare offer that registered childminders considered that their parents would (still) benefit from (more/continued) information about was also: understanding the eligibility criteria, followed in frequency by: using more than one childcare provider/splitting the hours.

- 14 All *responding* early years childcare providers and registered childminders who were not (yet) offering 30 hour childcare offer places in summer 2018 were requested to outline under what circumstances they would consider doing so.

32% of applicable early years childcare providers and registered childminders stated: If we/I had the demand from parents

16% of applicable early years childcare providers and registered childminders stated: If it helped our/my business

18% of applicable early years childcare providers and registered childminders stated: If we were/I was confident it would not cause us/me any sustainability concerns

12% of applicable early years childcare providers/settings and registered childminders stated: If I were confident it would not add to our paperwork and administration tasks (indeed, only registered childminders provided this

- 15 All *responding* early years childcare providers and registered childminders who were not (yet) offering 30 hour childcare offer places in summer 2018 were asked whether they envisaged that they would begin to provide 30 hours childcare places at some point (i.e. autumn, spring or summer) in 2018 – 2019.

- (Only) 5% of applicable responding early years childcare providers/settings stated: Yes
- (Only) 5% of applicable responding early years childcare providers/settings stated: Maybe

- 0 of applicable responding registered childminders stated: Yes
- 26% of applicable responding registered childminders stated: Maybe – and they were most frequently located in the Maidenhead vicinity of the Royal Borough

- 16 74% of (mostly PVI sector) early years childcare providers/settings stated they were providing funded entitlement for 2 year old places, in summer 2018 – and 26% stated that they were not.

Additionally, 16% of registered childminders stated they were providing funded entitlement for 2 year old places, in summer 2018 – and 84% stated that they were not.

However, 33% of the early years childcare providers/settings stated that they *were not* – in summer 2018 – able to meet the demand that they were receiving from parents for funded entitlement for 2 year old places – with a relatively high incidence of such settings being located in the (geographically broad) Hurley and Waltham’s ward.

Additionally, 25% of the early years childcare providers also stated that they *were not* – in summer 2018 – able to meet the demand that they were receiving from parents for 15 hours funded entitlement for 3 and 4 year old places – with a relatively high incidence of such settings being located in the bordering (Maidenhead locality) wards of Oldfield and Boyn Hill.

- 17 All *responding* early years childcare providers/settings and registered childminders who were providing at least one of the funded entitlements were invited to state whether they considered that the advent of the 30 hours childcare offer had resulted in any (early) positive, or negative, effects on (the take up of) the funded entitlement for 2 year olds and or the 15 hours funded entitlement for 3 and 4 year olds.

The most frequent statement was (words to the effect) *“There has been no effect on the other two entitlements”* – stated by 73% of applicable childcare providers.

The second most frequent statement was only stated by eight registered childminders and was (words to the effect) *“It has had a negative effect due to the time that it takes to receive the funding”*.

- 18 13% of registered childminders stated that they did not anticipate being in business in 2 years time. (The comparable percentage observed for the 2016 CSA was 15%).

- 19 Approximately 2 : 5 of early years childcare providers *did not* feel that there were sufficient childcare places *in their immediate geographical area* for children with SEND and children with complex medical needs.

Key Findings from Parents of 0 – 5 years Survey

- 20 Parents of 0 – 5 year olds who stated that they were accessing at least one type of formal childcare in summer 2018 were invited to outline the number of hours/week they used it for in the term-time period and during (school) holidays.

For term-time(s), the average number of weekly hours stated was 27.5 and for holiday times the average number of weekly hours stated was 20.5.

The following three wards accounted for applicable parents stating the *highest* average term-time hours:

1. Ascot and Cheapside
2. Sunninghill and South Ascot
3. Park

The following three wards accounted for applicable parents stating the highest average holiday time hours:

1. (As above) Ascot and Cheapside
2. (Also, as above) Sunninghill and South Ascot
3. Maidenhead Riverside

- 21 The most frequent barrier that *had been* experienced by those parents/carers who were (nonetheless) accessing at least one type of formal early years childcare was: their preferred childcare provider had had a waiting list (1 : 5 of applicable respondents), followed in frequency by a relevant parent/carer being: unable to afford their preferred childcare.

- 22 Approximately 8% of users of formal childcare in summer 2018 were, to some degree, not satisfied with their current arrangements. The response: Quite or Very Dissatisfied, when provided, tended to originate from a respondent who was resident in the Maidenhead vicinity of the Royal Borough.

- 23 The parents of 3, 4 and 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out, i.e. 2017 – 2018, were invited to state whether they considered that the 30 hours childcare offer had helped them and/or a partner to remain in work or to take up employment...

59% of applicable parents/carers stated:

Yes, it has helped me and/or a partner to remain in employment/self-employment/a job

5% of applicable parents/carers stated:

Yes, it has helped me and/or a partner to take up a part-time job/part-time self-employment

Cont.

7% of applicable parents/carers stated:
Yes, it has helped me and/or a partner to take up a full-time job/full-time self-employment

29% of the applicable parents/carers responded that their circumstance(s) had not been affected by the [m accessing the] childcare offer.

24 The responding parents of 3, 4 and 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out were invited to state how 'easy' they found securing a 30 hours childcare place...

- 24% of applicable parents/carers stated: it was very easy
- 30% of applicable parents/carers stated: It was fairly straightforward
- 27% of applicable parents/carers stated: It was not as easy as I would have liked
- 19% of applicable parents/carers stated: It was complicated and/or stressful

Those applicable parents/carers who stated (a) it was not as easy as I would have liked or (b) it was complicated and/or stressful were requested to state the reason(s) for their response.

The most frequent reason was evidently (words to the effect):
"The online eligibility portal... made it challenging".

The second most frequent reason was evidently (words to the effect):
"The need to re-confirm eligibility... made it challenging".

The third most frequent reason was evidently (words to the effect):
"I experienced a delay receiving the eligibility code".

25 The type of Royal Borough-based early years childcare provider that was being accessed in 2017 – 2018 in order to take-up a 30 hours childcare offer place was – by a significant margin – a PVI sector day nursery

It was observed that (only) 4% of applicable parents/carers of 3 and/or 4 year olds had accessed a 30 hours childcare offer place at a registered childminder.

26 The responding parents of 3, 4 and 5 year olds who *had not* accessed the 30 hours childcare offer during its first year of full roll-out stated that *if* a 0 – 4 year old of theirs did so in the future, they most frequently envisaged that (a) this would be at a PVI sector day nursery – and (b) that they would seek to access the full 30 hours.

- 27 One-quarter of all responding parents/carers were evidently accessing (at least one type of) informal childcare – most frequently: grandparents. Indeed, the Maidenhead Riverside ward accounted for a relatively high/notable incidence of informal childcare usage – as did the nearby Boyn Hill ward.

13% of the responding parents/carers stated that they *were not* – in summer 2018 – accessing/using any formal *or* informal childcare and that childcare (therefore) was only provided by themselves and/or a partner, where applicable. The three most frequently stated reasons as to why – in summer 2018 – these parents/carers were not accessing any formal (or informal) childcare were – in order of frequency:

1. I find formal childcare too expensive – 39% of applicable parents
2. I do not need formal childcare – 37% of applicable parents
3. I do not want to use formal childcare – 27% of applicable parents

- 28 Responding parents/carers of 2 – 5 year olds who were (a) only using informal childcare or (b) not using any formal or informal childcare were invited to clarify which of the three funded early years/childcare programmes they had actually heard of.

- 38% of such respondents stated that they had heard of the funded entitlement for 2 year olds
- 71% of such respondents stated that they had heard of the 15 hours funded entitlement for 3 and 4 year olds
- 69% of such respondents stated that they had heard of the 30 hours childcare offer

20% of applicable parents/carers stated that they had not heard of any of the three types of funded early years/childcare.

In terms of those who *had* heard about the *30 hours childcare offer* but were not accessing it, the most frequent reason for this was: I am not eligible (due to the level of my household salaries).

- 29 Responding parents/carers of 2 – 4 year olds who were (a) only using informal childcare or (b) not using any formal or informal childcare were invited to state whether they believed they would access the 30 hour childcare offer in the future for any of their applicable children. 37.5% of such respondents stated: Yes. 25% of such respondents stated: No. 37.5% of such respondents stated: Don't know.

(A ward which accounted for a relatively high frequency of applicable (current) non-users of formal or informal childcare stating that they *would* be interested in accessing the 30 hours childcare offer in the future was the Belmont ward, within the Maidenhead vicinity).

- 30 Responding parents/carers of 2 – 4 year olds who were (a) only using informal childcare or (b) not using any formal or informal childcare were invited to state what type of childcare setting they would prefer to access a 30 hours childcare offer place at, if they decided to do so at some point in the near future. The most frequent type of provision stated – by a significant margin – was one of the Royal Borough’s PVI sector day nurseries.

Introduction

The following Royal Borough of Windsor and Maidenhead 2018 Childcare Sufficiency Assessment (CSA) provides an updated overview of the *early years* childcare market throughout the Royal Borough of Windsor and Maidenhead, as of summer 2018¹.

Fundamentally, in 2018 the CSA has a particular focus on the evolving 30 hours childcare offer and how its first year of roll out (i.e. 2017 – 2018) has been viewed by both early years childcare providers and registered childminders – and parents/carers of under 5 year olds who are resident within the Royal Borough.

Essentially, the CSA has sought to determine how the first year of roll out has progressed in terms of the necessary processes involved in its implementation and the impact(s) that it has evidently had on the Royal Borough's many working families.

The CSA does not exclusively focus on early years childcare, and out of school childcare providers were also consulted (in particular – see pages 46 – 52) to attain their valued feedback on subjects such as trends that they have observed since the 2016 CSA and the sufficiency of childcare places aligned to age groups.

The following '30 hours-themed' Childcare Sufficiency Assessment was undertaken by Premier Advisory Group during the period summer 2018 – late 2018 on behalf of the Royal Borough of Windsor and Maidenhead. That organisation's Sufficiency Projects team had previously produced the 2016 CSA for the Royal Borough of Windsor and Maidenhead.

¹ Whilst every care has been taken in the compilation of this information, the Royal Borough of Windsor and Maidenhead will not be held responsible for any loss, damage, or inconvenience caused to any person as a result of any inaccuracy or error contained within these pages.

Background

The 30 hours childcare offer came in to effect from September 2017 throughout the country and within the Royal Borough of Windsor and Maidenhead.

The first year of *full* national roll out concluded in summer 2018, and the Childcare Sufficiency Assessment update for 2018 was timed to coincide with that period, so as to gather fundamental intelligence about its initial impact(s) on local families and upon the early years childcare sector – particularly in terms of whether its evolving implementation was having any affects on the supply of and demand for (a) funded entitlement for 2 year olds places and (b) 15 hours funded entitlement for 3 and 4 year olds places.

The Royal Borough of Windsor and Maidenhead's 2016 CSA had recommended that:

Those responsible for childcare sufficiency planning should monitor the ongoing intention of the early years childcare sector to deliver the increased 30 hours entitlement, when it comes into practice in the Royal Borough in September 2017.

The research summarised in the following sufficiency assessment has sought to determine the extent to which the *intention* to deliver 30 hours childcare offer provision has indeed been realised, and whether the *early signs* are that there are enough places for eligible 3 and 4 year olds to meet the localised demand, including aligned to...

...Table 1 below, which outlines the number of eligibility codes that had been issued to relevant parents/carers in summer 2018, to enable them to access the (evolving) 30 Hours Childcare offer...

Table 1 - Eligibility codes issued and validated and children accessing a 30 hours place in the Royal Borough in summer 2018

| Number of eligibility codes issued | Codes validated (number) | Codes validated (%) | Number of children aged 3 and 4 years occupying a 30 hours places | Children in a 30 hours place as a percentage of codes issued |
|------------------------------------|--------------------------|---------------------|---|--|
| 862 | 778 | 90% | 750 | 87% |

The Royal Borough of Windsor and Maidenhead – a reminder of its fundamental characteristics

The Royal Borough of Windsor and Maidenhead is part of the county of notional county of Berkshire. It is situated c12 miles west of London and it has notable transport and communications infrastructure. The A4 and the M4 run through the borough and there are ten train stations served by six lines.

In 2015, 22.5% of the total population were aged are under 18, compared to 21.3% nationally. This total population is concentrated in two urban centres: 1. Windsor (with a population of approximately 28,000 in total) and 2. Maidenhead (with a population of approximately 52,000). Another large town in the south west of the locality is Ascot.

The Royal Borough has a GDP per capita for the Thames Valley region which ranks 10th in Europe. Indeed the locality attracts a variety of business activities ranging from small and medium-sized enterprises, to the head offices of leading UK and multi-national companies.

The employment rate in the Royal Borough at approximately 80% is better than the national average.

However, there are four ward areas considered to be the most deprived in the locality – Clewer North, Belmont, Furze Platt and Oldfield.

Methodology

The fieldwork and research which informed the 2018 Royal Borough of Windsor and Maidenhead Childcare Sufficiency Assessment was conducted during the period June 2018 – August 2018.

Four types of research and analysis were undertaken:

1. Parental Demand Survey

During July 2018, a fixed sample of 300 parents and carers were interviewed – via (in the majority of cases) a structured cati (computer assisted) telephone interview or a face-to-face fieldwork interview – about the subject of early years childcare within the Royal Borough of Windsor and Maidenhead locality.

A sampling framework was developed whereby:

- 100 interviewees/parents had at least one child aged 3 – 4 years who had accessed the 30 hours childcare offer in 2017 – 2018, its first year of national roll-out
- 100 interviewees/parents had at least one child aged 3 – 4 years who *had not* accessed the 30 hours childcare offer in 2017 – 2018
- 100 interviewees/parents had at least one child aged 0 – 2 years

This methodology was implemented in order to ensure coverage of the types of issues that the Royal Borough wished to examine for the 2018 Childcare Sufficiency Assessment, particularly around the evolving 30 hours childcare offer and (any affects it was having on) the two types of funded entitlements.

2. Telephone Survey with Childcare Providers

During June – July 2018 a structured cati style telephone survey was undertaken with formal childcare providers operating throughout the Royal Borough of Windsor and Maidenhead locality. All of the locality's registered formal childcare providers, i.e. PVI sector nurseries and pre-school playgroups, maintained school nursery classes, registered childminders and out of school childcare providers, were invited to participate – which the majority did.

A standard format of semi-structured interview questions invited childcare providers to feedback on issues *including*:

- Number of children *on roll* and *occupying* a 30 hours childcare offer place
- Evolving impact(s) of the 30 hours childcare offer
- Any evident challenges associated with the first year roll out of the 30 hours childcare offer
- Demand observed for all (three types of) funded entitlements
- Any observed affects that the 30 hours childcare offer is having on the (demand for and supply of) the funded entitlement for 2 year olds and the 15 hours funded entitlement for 3 and 4 year olds

- Observed trends in the backgrounds of children and families accessing provision – including since (the previous Royal Borough of Windsor and Maidenhead CSA in) 2016

3. Identification of key demographic and socio-economic issues

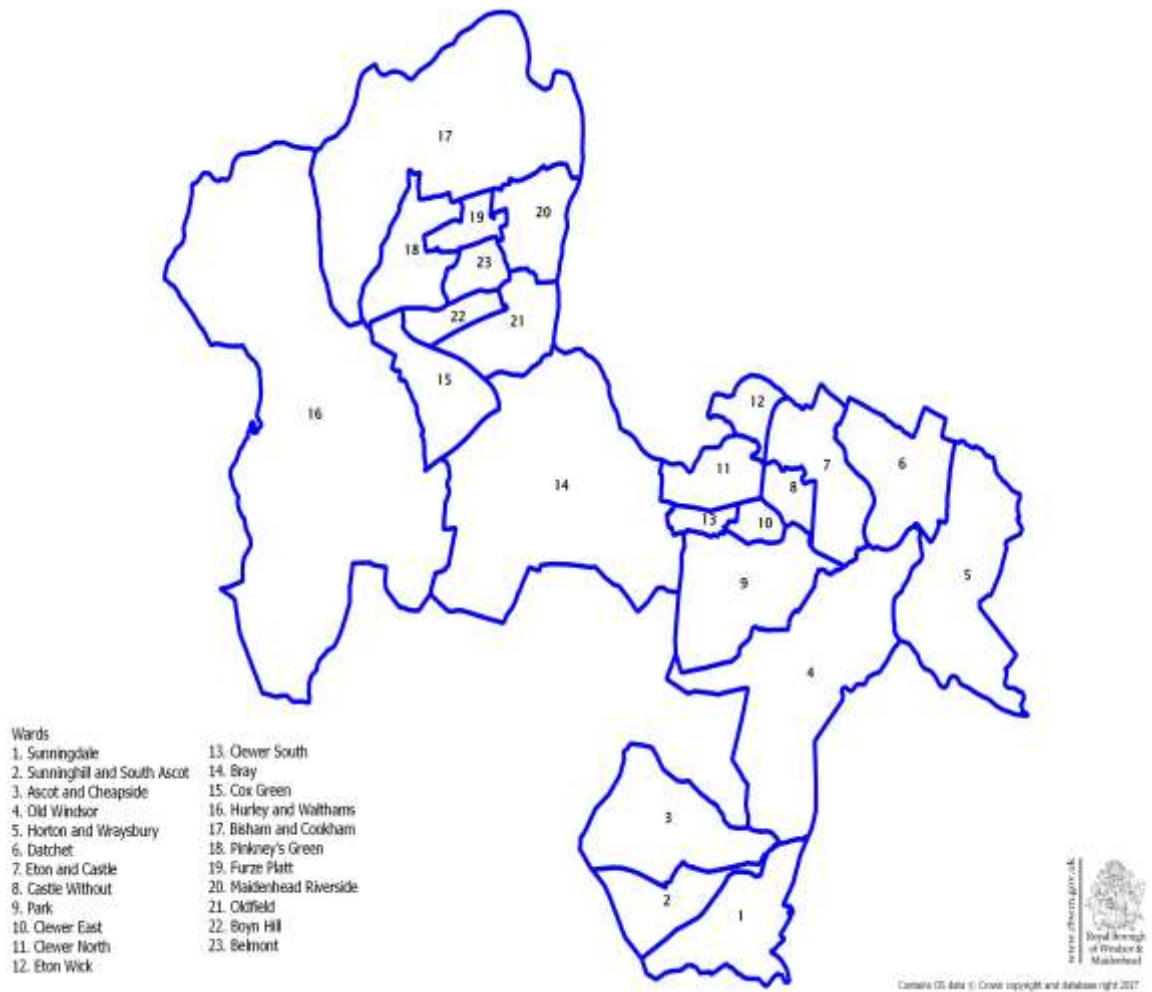
Structured desk research was undertaken in order to identify demographic and socio-economic factors which will have a *discernible influence* on the (sufficiency of and suitability of) existing and future provision of early years childcare and funded entitlements throughout the Royal Borough of Windsor and Maidenhead locality and its (at present) 23 wards. This desk research included a focus on:

- Population projections/forecasts for 3 – 4 year olds and 2 year olds
- Birth rates since 2015 in order to help inform forthcoming potential demand for 30 hours childcare offer provision
- Migration data
- Incidence of working families (that are eligible to take-up the 30 hours childcare offer)
- Average household incomes
- Incidence of major new housing development, including those that have been approved since the 2016 CSA

4. Gaps Analysis and CSA Production

A 2018 Childcare Sufficiency Assessment was produced in August 2018. It has incorporated a gaps analysis which has a specific focus on strategic priorities for childcare planners in the Royal Borough aligned to the funded childcare entitlements.

Royal Borough of Windsor and Maidenhead and its twenty-three² wards



² The independent Local Government Boundary Commission for England concluded its review of the ward boundaries for the Royal Borough of Windsor and Maidenhead in summer 2018. On 10 July 2018, the LG BCE published their final recommendations and stated that there will be 41 borough councillors elected to the council from the date of the next local elections in May 2019. There will be 19 wards – rather than 23 – across the Borough. In summary, the boundaries of all but five of the current wards will change. The wards with no boundary changes are Bisham & Cookham, Bray, Cox Green, Furze Platt and Hurley & Walthams.

1 Key Demographic Factors affecting the childcare market

The following section presents an analysis which focuses on how demographic and socio-economic factors may affect forthcoming – localised – demand for 30 hours childcare offer places and the two types of funded early years entitlements.

The data sets and relevant metrics aligned to the borough's 23 wards – including:

- Population projections/forecasts for 3 – 4 year olds and 2 year olds
- Birth rates since 2015 in order to help inform forthcoming potential demand for 30 hours childcare offer provision
- Migration data
- Incidence of working families (that are eligible to take-up the 30 hours childcare offer)
- Average household incomes
- Incidence of major new housing development, including those that have been approved since the 2016 CSA

Again, a key objective of the following narrative and analysis is to consider the extent to which childcare and early years planners within the Royal Borough of Windsor and Maidenhead may need to (continue to) prioritise its abilities to help instigate *further* 30 hours childcare places/provision in specific/targeted geographical localities.

1.1 Existing and forecast population of children and young people resident in the Royal Borough of Windsor and Maidenhead

1.1.1 Table 2 overleaf indicates the number of children and young people resident in each of the Royal Borough of Windsor and Maidenhead's 23 wards aligned to the following age groups:

- 2 year
- 3 – 4 years

Table 2 - Approximate number of children and young people aged 2, 3 and 4 years (forecast to be) resident in each of the Royal Borough of Windsor and Maidenhead 23 wards in 2018 (source: Office of National Statistics 2016)

| Ward | Number of Resident 2 year olds | Percentage of Resident 2 year olds | Number of Resident 3 - 4 year olds | Percentage of Resident 3 - 4 year olds |
|--|--------------------------------|------------------------------------|------------------------------------|--|
| Ascot & Cheapside | 42 | 2.5% | 102 | 2.7% |
| Belmont | 144 | 8.2% | 271 | 7.2% |
| Bisham & Cookham | 87 | 5% | 143 | 3.8% |
| Boyn Hill | 136 | 7.8% | 254 | 6.7% |
| Bray | 75 | 4.3% | 187 | 4.9% |
| Castle Without | 86 | 4.9% | 184 | 4.9% |
| Clewer East | 65 | 3.7% | 152 | 4% |
| Clewer South | 104 | 5.9% | 231 | 6.1% |
| Clewer North | 85 | 4.8% | 199 | 5.2% |
| Cox Green | 80 | 4.5% | 233 | 6.1% |
| Datchet | 74 | 4.2% | 134 | 3.5% |
| Eton & Castle | 26 | 1.5% | 50 | 1.3% |
| Eton Wick | 26 | 1.5% | 48 | 1.7% |
| Furze Platt | 76 | 4.3% | 209 | 1.3% |
| Horton & Wraysbury | 37 | 2.1% | 84 | 2.2% |
| Hurley & Walthams | 61 | 3.5% | 131 | 3.5% |
| Maidenhead Riverside | 113 | 6.5% | 221 | 5.8% |
| Old Windsor | 47 | 2.7% | 118 | 3.1% |
| Oldfield | 140 | 8% | 282 | 7.4% |
| Park | 59 | 3.4% | 147 | 3.8% |
| Pinkneys Green | 83 | 4.7% | 159 | 4.2% |
| Sunningdale | 50 | 2.9% | 93 | 2.4% |
| Sunninghill & S Ascot | 50 | 2.9% | 152 | 4% |
| Total Royal Borough of Windsor and Maidenhead | 1,746 | 100% | 3,784 | 100% |

Table 2 indicates that the highest number of 2 year olds are evidently resident (in order of frequency) in the following three wards (that share a border):

1. Belmont ward
2. Oldfield ward
3. Boyn Hill ward

Table 2 also indicates that the highest number of 3 – 4 year olds are evidently resident (in order of frequency) in the following three wards:

1. Oldfield ward
2. Belmont ward
3. Boyn Hill ward

It should be noted that the Belmont ward and the Oldfield ward both account for pockets of relative deprivation. Additionally, the table indicates that in 2018, a forecast total of 1,746, 2 year olds were resident within the Royal Borough, most frequently within its Maidenhead vicinity. The table also indicates that in 2018 a forecast total of 3,784, 3 and 4 year olds were resident within the Royal Borough, most frequently again within its Maidenhead vicinity.

1.1.2 In terms of a current position with regard to school-aged children and young people, Table 3 below indicates the number of children and young people resident in each of the London Borough of Hounslow's 23 wards aligned to the following age groups:

- 5 – 7 year olds
- 8 – 11 year olds
- 12 – 16 year olds

Table 3 - Number of children and young people aged 5 – 16 years (forecast to be) resident in each of the Royal Borough of Windsor and Maidenhead 23 wards in 2018 (source: Office of National Statistics 2016)

| Ward | Number of Resident 5 – 7 year olds | Percentage of Resident 5 – 7 year olds | Number of Resident 8 – 11 year olds | Percentage of Resident 8 – 11 year olds | Number of Resident 12 – 16 year olds | Percentage of Resident 12 – 16 year olds |
|--|------------------------------------|--|-------------------------------------|---|--------------------------------------|--|
| Ascot & Cheapside | 209 | 3.5% | 367 | 4.8% | 456 | 4.7% |
| Belmont | 381 | 6.3% | 474 | 6.2% | 579 | 5.9% |
| Bisham & Cookham | 289 | 4.8% | 367 | 4.8% | 379 | 3.9% |
| Boyn Hill | 380 | 6.4% | 434 | 5.7% | 498 | 5.1% |
| Bray | 312 | 5.2% | 367 | 4.8% | 517 | 5.3% |
| Castle Without | 264 | 4.4% | 275 | 3.6% | 304 | 3.1% |
| Clewer East | 222 | 3.7% | 264 | 3.5% | 280 | 2.9% |
| Clewer South | 324 | 5.4% | 350 | 4.6% | 438 | 4.5% |
| Clewer North | 294 | 4.9% | 292 | 3.8% | 263 | 2.7% |
| Cox Green | 348 | 5.8% | 405 | 5.3% | 443 | 4.6% |
| Datchet | 188 | 3.1% | 252 | 3.3% | 284 | 2.9% |
| Eton & Castle | 61 | 1% | 92 | 1.2% | 681 | 7% |
| Eton Wick | 69 | 1.1% | 94 | 1.2% | 112 | 1.1% |
| Furze Platt | 336 | 5.6% | 412 | 5.4% | 529 | 5.5% |
| Horton & Wraysbury | 156 | 2.6% | 220 | 2.9% | 260 | 2.7% |
| Hurley & Walthams | 227 | 3.8% | 337 | 4.4% | 347 | 3.6% |
| Maidenhead Riverside | 274 | 4.5% | 345 | 4.5% | 437 | 4.5% |
| Old Windsor | 194 | 3.2% | 263 | 3.5% | 284 | 2.9% |
| Oldfield | 437 | 7.3% | 475 | 6.2% | 483 | 4.9% |
| Park | 242 | 4% | 312 | 4.1% | 356 | 3.7% |
| Pinkneys Green | 315 | 5.2% | 431 | 5.7% | 497 | 5.1% |
| Sunningdale | 190 | 3.2% | 374 | 4.9% | 449 | 4.6% |
| Sunninghill & S Ascot | 253 | 4.2% | 392 | 5.2% | 788 | 8.1% |
| Total Royal Borough of Windsor and Maidenhead | 5,965 | 100% | 7,594 | 100% | 9,664 | 100% |

Table 3 indicates that the highest number of 5 – 7 year olds are evidently resident (in order of frequency) in the following three wards:

1. Oldfield ward
2. Belmont ward
3. Boyn Hill ward

Additionally, Table 3 indicates that the highest number of 8 – 11 year olds are evidently resident (in order of frequency) in the following three wards:

1. Oldfield ward
2. Belmont ward
3. Boyn Hill ward

Finally, Table 3 indicates that the highest number of 12 – 16 year olds are evidently resident (in order of frequency) in the following three wards:

1. Eton and Castle ward
2. Belmont ward
3. Furze Platt ward

- 1.1.3 Table 4 below indicates that – fundamentally – the population of older children aged 12 – 16 years is forecast to increase at a greater rate than the population of young children. The population of children aged 3 – 4 years is projected to (marginally) increase. The population of children aged 2 year olds is also projected to (marginally) increase.

Table 4 - Number of children and young people forecast to be resident in the Royal Borough of Windsor and Maidenhead by 2025
(source: Office of National Statistics 2016)

| Age cohort | Resident Population 2018 | Resident Population 2021 | No. increase 2018 – 2021 | Resident Population 2025 | No. increase 2018 – 2025 |
|---------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 0 – 1 years | 3,518 | 3,551 | +33 | 3,532 | +14 |
| 2 years | 1,799 | 1,820 | +21 | 1,824 | +25 |
| 3 – 4 years | 3,654 | 3,706 | +52 | 3,739 | +84 |
| 5 – 7 years | 5,896 | 5,657 | -237 | 5,732 | -164 |
| 8 – 11 years | 8,078 | 8,299 | +221 | 7,943 | -135 |
| 12 – 16 years | 9,837 | 10,832 | +995 | 11,561 | +1,724 |
| Total 0 – 16 | 32,784 | 33,867 | +1,083 | 34,353 | +1,569 |

1.2 Birth rates in the Royal Borough of Windsor and Maidenhead

Table 5 presents the live births that were recorded in the Royal Borough of Windsor and Maidenhead in the year 2015 in each of its twenty-three wards.

Table 5 - Birth rates in the Royal Borough of Windsor and Maidenhead in 2016 (ONS 2017)

| Ward | Live births in 2016 |
|---------------------------|---------------------|
| Ascot & Cheapside | 24 |
| Belmont | 133 |
| Bisham & Cookham | 74 |
| Boyn Hill | 131 |
| Bray | 87 |
| Castle Without | 114 |
| Clewer East | 70 |
| Clewer South | 95 |
| Clewer North | 85 |
| Cox Green | 96 |
| Datchet | 70 |
| Eton & Castle | 13 |
| Eton Wick | 31 |
| Furze Platt | 74 |
| Horton & Wraysbury | 70 |
| Hurley & Walthams | 71 |
| Maidenhead Riverside | 119 |
| Old Windsor | 57 |
| Oldfield | 139 |
| Park | 66 |
| Pinkneys Green | 56 |
| Sunningdale | 37 |
| Sunninghill & South Ascot | 45 |
| Total | 3,434 |

Table 5 indicates that the following three wards within the Maidenhead vicinity had the highest birth rates, in 2015 – i.e. of children (closing in on) being potentially eligible for a 30 hours childcare offer place:

- Belmont ward
- Oldfield ward
- Boyn Hill ward

1.3 Migration

Table 6 demonstrates the apparent trend for the Royal Borough of Windsor and Maidenhead in terms of *international* migration inflows and outflows and internal (within the UK) migration inflows and outflows...

Table 6 - Royal Borough of Windsor and Maidenhead (a) international migration and (b) internal migration inflows and outflows trends observed since 2012 – 2013 up to 2016 – 2017 (source: ONS 2018)

| International Migration | | | | | |
|-------------------------|-------------|-------------|-------------|-------------|-------------|
| Year | 2012 – 2013 | 2013 – 2014 | 2014 – 2015 | 2015 – 2016 | 2016 – 2017 |
| Inflows | | | | | |
| RBW&M | 976 | 1,136 | 1,286 | 1,282 | 1,139 |
| Outflows | | | | | |
| RBW&M | 871 | 685 | 724 | 692 | 754 |
| Net migration churn | +105 | +451 | +562 | +590 | +385 |
| Internal Migration | | | | | |
| Inflows | | | | | |
| RBW&M | 8,567 | 9,094 | 8,963 | 9,160 | 9,297 |
| Outflows | | | | | |
| RBW&M | 8,737 | 8,898 | 9,155 | 8,832 | 9,683 |
| Net migration flow | -170 | +196 | +192 | +328 | -416 |

Table 6 indicates that international migration consistently indicates a surplus of *inward* flow. However, in 2016 – 2017 more people, who were already resident in the UK, moved out of the locality than moved in to the locality. The trend however is that (the greater level of overall) inward migration is – in all probability – including a tangible number of young families.

1.4 Employment

Table 7 - Incidence of employment and unemployment in the Royal Borough of Windsor and Maidenhead's wards (NOMIS 2017 using ONS 2011 data)

| Ward | Economically active | Unemployed |
|-------------------|---------------------|------------|
| Ascot & Cheapside | 76.5% | 3.7% |
| Belmont | 82.3% | 4.6% |
| Bisham & Cookham | 81.5% | 3.4% |
| Boyn Hill | 82.7% | 5.5% |
| Bray | 82.4% | 4% |
| Castle Without | 87.5% | 2.8% |
| Clewer East | 84.5% | 3.7% |
| Clewer South | 81.3% | 5.8% |
| Clewer North | 83% | 6.4% |
| Cox Green | 82.9% | 4.9% |

| Ward | Economically active | Unemployed |
|---------------------------|---------------------|------------|
| Datchet | 81.8% | 5.5% |
| Eton & Castle | 83.8% | 5.4% |
| Eton Wick | 65.4% | 2.3% |
| Furze Platt | 79.5% | 5.7% |
| Horton & Wraysbury | 82.6% | 4.5% |
| Hurley & Walthams | 80.4% | 5.5% |
| Maidenhead Riverside | 81.2% | 5.1% |
| Old Windsor | 84.2% | 3.8% |
| Oldfield | 82.5% | 7.6% |
| Park | 82.3% | 4.2% |
| Pinkneys Green | 81% | 5.6% |
| Sunningdale | 76.9% | 4.1% |
| Sunninghill & South Ascot | 76.4% | 4.2% |

The five (Windsor locality) wards which accounted for the highest frequency of adults in employment, i.e. it can be assumed working families, are/were:

1. Castle Without ward
2. Clewer East ward
3. Old Windsor ward
4. Eton and Castle ward
5. Clewer North ward

2.5 New housing developments in the Royal Borough of Windsor and Maidenhead

The 2016 Royal Borough of Windsor and Maidenhead CSA outlined how the local authority had set a target of approximately 14,240 dwellings to be built in the borough during the period 2013 to 2033. The document, drawing on content of the Borough's Local Plan also:

- Outlined plans for the redevelopment of Maidenhead Golf Club site – see page 28
- Outlined how that site could also be neighboured by two further (530 dwelling) developments at Harvest Hill Road and Manor Lane
- Presented a table overleaf which outlined a planned number of (net) new housing developments identified to be taking place and to be completed in each of the Royal Borough of Windsor and Maidenhead localities 23 wards by the close of 2021

Table 8 - (Published within the 2016 CSA and indicating the) number of new housing developments set to take place in each of the localities 23 wards up to 2021 (source: Royal Borough of Windsor and Maidenhead 2016)

| Ward | Number of ongoing to be completed dwellings in ward during period 2016 – 2017 to 2020 – 2021 |
|---------------------------|--|
| Ascot & Cheapside | 58 |
| Belmont | 117 |
| Bisham & Cookham | 31 |
| Boyn Hill | 30 |
| Bray | 93 |
| Castle Without | 134 |
| Clewer East | 44 |
| Clewer South | 4 |
| Clewer North | 164 |
| Cox Green | 18 |
| Datchet | 27 |
| Eton & Castle | 71 |
| Eton Wick | 8 |
| Furze Platt | 25 |
| Horton & Wraysbury | 22 |
| Hurley & Walthams | 66 |
| Maidenhead Riverside | 67 |
| Old Windsor | 15 |
| Oldfield | 1,003 |
| Park | 21 |
| Pinkneys Green | 53 |
| Sunningdale | 167 |
| Sunninghill & South Ascot | 58 |
| Total | 2,296 |

Table 8 indicated that the highest number of new housing developments (by a significant margin) were set to be constructed in the Oldfield ward, followed in frequency by the Sunningdale ward and the Clewer North ward. An accepted yield formula applied by a number of UK local authorities with regard to the planning of their sufficiency of *school* places is an additional 4 children per 100 new (family) houses per year group will be generated for pre-school/primary age children. In 2016, the formula was applied in terms of calculating the additional children aged 2, 3 and 4 years that may be requiring an *early years childcare* place in the Oldfield ward at the conclusion (and occupation) of the developments listed above. It was subsequently *estimated* that the cumulative new housing units could lead to a requirement of approximately 120 new such places in that ward, i.e. 40 (additional) places for each of the three age groups: 2, 3 and 4 years.

Since 2016...

In 2017, the Royal Borough of Windsor and Maidenhead approved an extra 8,900 school places for the locality, partly in response to a growing pressure

that was accruing as an outcome of (increasing) birth rates and inward migration – plus, as an outcome of the new housing developments that were being completed and their eventual occupation.

The 2017 (Submission) version of the Local Plan outlined how “A significant contribution of 3,772 new dwellings towards meeting the [14,420] target has already been made by sites which have either been developed or are committed”. The 2017 version of the Local Plan also added stated:

“Development in and adjacent to Maidenhead town centre is anticipated to provide a large number of new dwellings, including the redevelopment of existing sites for higher intensity development”.

...the updated Local Plan also lists the following proposed sites/developments due for completion by 2033.

Table 9 - Sites/housing developments due for completion by 2033 as itemized in the updated 2017 Submission version of the Royal Borough’s Local Plan (source: 2017 Updated Royal Borough Local Plan)

| Ward | Name of development/site | Expected dwelling numbers to be completed by 2033 |
|----------------------------|--------------------------------|---|
| Ascot and Cheapside | | |
| Ascot and Cheapside | Ascot Centre | 300 |
| Ascot and Cheapside | Ascot Station Car Park | 35 |
| Ascot and Cheapside | Englemere Lodge, London Road | 10 |
| Ascot and Cheapside | Heatherwood Hospital in Ascot | 250 |
| Ascot and Cheapside | Silwood Park in Sunningdale | 75 |
| Ward Total | | 670 |
| Belmont | | |
| Belmont | West Street | 240 |
| Belmont | Osbornes Garage site | 20 |
| Belmont | DTC Research site | 31 |
| Ward Total | | 291 |
| Bisham and Cookham | | |
| Bisham & Cookham | Cookham Gas holder, Cookham | 40 |
| Bisham & Cookham | Land east of Strande Park | 20 |
| Bisham & Cookham | Land north of Lower Mount Farm | 200 |
| Ward Total | | 260 |
| Boyn Hill | | |
| Boyn Hill | Boyn Valley Industrial Estate | 240 |
| Boyn Hill | Middlehurst, Boyn Valley Road, | 45 |
| Ward Total | | 285 |

| | | |
|-----------------------------|------------------------------------|-----|
| Bray | | |
| Bray | Tectonic Place, Holyport Road | 25 |
| Bray | Windsor Road and Bray Lake site | 100 |
| Bray | Land west of Monkey Island Lane, | 100 |
| Ward Total | | 225 |
| Castle Without | | |
| Castle Without | Minton Place, Victoria Street | 100 |
| Castle Without | Windsor Police Station site | 35 |
| Ward Total | | 135 |
| Clewer East | | |
| Clewer East | York Road | 320 |
| Ward Total | | 320 |
| Clewer North | | |
| Clewer North | Vale Road Industrial Estate | 80 |
| Clewer North | Land adjacent to A308, Windsor | 450 |
| Ward Total | | 530 |
| Cox Green | | |
| Cox Green | Woodlands Business Park site | 300 |
| Ward Total | | 300 |
| Datchet | | |
| Datchet | Churchmead School adjacent site | 175 |
| Datchet | Slough Road/Riding Court Rd site | 150 |
| Datchet | Land north of Eton Road | 35 |
| Ward Total | | 360 |
| Eton and Castle | | |
| Eton and Castle | Windsor Riverside Station Car Park | 30 |
| Ward Total | | 30 |
| Horton and Wraysbury | | |
| Horton & Wraysbury | East of Queen Mother Reservoir | 100 |
| Horton & Wraysbury | Land adjacent to Coppermill Road | 27 |
| Horton & Wraysbury | Tithe Farm, Tithe Lane, Wraysbury | 30 |
| Horton & Wraysbury | Grove Business Park | 66 |
| Ward Total | | 223 |
| Hurley and Walthams | | |
| Hurley and Walthams | Land north of Breadcroft Lane | 100 |
| Ward Total | | 100 |
| Maidenhead Riverside | | |
| Maidenhead Riverside | Land known as Spencer's Farm | 300 |
| Maidenhead Riverside | Summerleaze Road | 130 |
| Maidenhead Riverside | Land south of Ray Mill Road East | 60 |
| Maidenhead Riverside | Whitebrook Park site | 175 |
| Ward Total | | 665 |

| Old Windsor | | |
|-----------------------|---------------------------------|-------|
| Old Windsor | Straight Works site | 20 |
| Old Windsor | 95 Straight Road site | 11 |
| Ward Total | | 31 |
| Oldfield | | |
| Oldfield | Maidenhead Railway Station | 150 |
| Oldfield | Reform Road | 150 |
| Oldfield | Maidenhead Golf Course | 2,000 |
| Oldfield | Land south of Harvest Hill Road | 380 |
| Oldfield | Land south of Manor Lane | 220 |
| Oldfield | Exclusive House, Oldfield Road | 40 |
| Oldfield | Saint-Cloud Way | 600 |
| Ward Total | | 3,540 |
| Sunningdale | | |
| Sunningdale | Sunningdale Park site | 230 |
| Sunningdale | Broomhall Car Park site | 28 |
| Ward Total | | 258 |
| Sunninghill & S Ascot | Gas holder site | 53 |
| Sunninghill & S Ascot | White House, London Road site | 10 |
| Ward Total | | 63 |

As presented in Table 9 above, in summer 2018, plans were finalised (through the selection of a developer) to create new homes and facilities as part of the Maidenhead Golf Club site³. Critically, the development is expected to yield approximately 2,000 new dwellings. A new primary and secondary school is expected to be established to help accommodate the educational needs of the families that eventually occupy the new dwellings and it can therefore be assumed that (new) daycare facilities/childcare places will also be required in order to meet an increased localised demand.

³ https://www3.rbwm.gov.uk/news/200495/regeneration_projects

2 Outcomes: Survey of Daycare Providers and Registered Childminders

During June and July 2018 a telephone survey – using a standard format of semi-structured interview questions – was undertaken with (a) registered daycare providers and (b) registered childminders operating throughout the Royal Borough of Windsor and Maidenhead locality.

70 early years (0 – 4 years) childcare providers – i.e. PVI early years childcare providers and maintained school nursery classes participated in the survey – i.e. 90% of Royal Borough of Windsor and Maidenhead’s early years childcare sector.

117 registered childminders participated in the survey – i.e. 75% of Royal Borough of Windsor and Maidenhead’s childminding sector.

41 out of school childcare providers – i.e. (22) after schools clubs, (8) breakfast clubs and (11) holiday playschemes – participated in the survey – i.e. 70% of Royal Borough of Windsor and Maidenhead’s out of school sector. These respondents were invited to contribute feedback aligned to issues such as occupancy, fees, trends being witnessed and (sector) sustainability.

Early years childcare providers and registered childminders were, for this 2018 Childcare Sufficiency Assessment, invited to respond to a set of questions related to funded early years and childcare places, i.e. the:

- Funded entitlement for 2 year olds
- 15 hours funded entitlement for 3 and 4 year olds
- 30 hours childcare offer

The following section below, 2.1 – 2.11 (pages 30 – 52), focuses on the feedback provided by the interview cohorts above... It should be noted that within the following analysis, the use of the term ‘early years childcare provider(s)’ combines the responses from the Royal Borough’s (a) PVI early years childcare providers and (b) maintained school nursery classes.

2.1 Periods that provision typically operates

2.1.1 Table 10 - Frequency with which the Royal Borough of Windsor and Maidenhead locality's early years childcare providers state that they typically operate

| (Annual) period of availability | Percentage of early years childcare providers* | Percentage of registered childminders |
|---------------------------------|--|---------------------------------------|
| Term-time only | 73% | 12% |
| All-year round | 27% | 87% |
| Other | 0 | 1% |

2.1.2 Table 10 indicates that the most frequent annual period of accessibility/availability reported by early years childcare providers for the 2018 Royal Borough of Windsor and Maidenhead CSA was term-time only, followed in frequency by all-year round.

2.2 Incidence of waiting lists

All *responding* childcare providers were asked whether they had a waiting list for their provision in summer 2018.

55% of responding early years childcare providers stated that they did have a waiting list, most frequently for the 0 – 12 months age group (where the average number per waiting list was 5 children), followed by the 2 years age group (where the average number per waiting list was 4).

Additionally, 13% of registered childminders stated that they did have a waiting list, most frequently for the 2 years age group (where the average number per waiting list was again 4).

(Only) 3% of out of school childcare providers stated that they did have a waiting list – most frequently the responding holiday playschemes.

2.3 Fees

2.3.1 All responding childcare providers were asked to outline their *hourly* fees/charges for specific age groups – see Table 11, overleaf, included for places for 2, 3 and 4 year olds which were outside of the scope of the funded entitlements.

2.3.2 Table 11 - Outline of *repeated* types of fees for childcare provision in the Windsor and Maidenhead locality

| Age Group | PVI sector early years childcare providers | | | Registered Childminders | | | After School Clubs | | |
|---------------|--|---------------|---------|-------------------------|---------------|---------|--------------------|---------------|---------|
| | Highest Recorded | Most Frequent | Average | Highest Recorded | Most Frequent | Average | Highest Recorded | Most Frequent | Average |
| 0 – 12 months | £9.33 | £6.68 | £6.46 | £7.00 | £6.00 | £5.71 | n/a | n/a | n/a |
| 1 years | £9.33 | £6.75 | £6.45 | £10.00 | £6.00 | £5.56 | n/a | n/a | n/a |
| 2 years | £9.33 | £5.00 | £5.71 | £7.00 | £6.00 | £5.66 | n/a | n/a | n/a |
| 3 – 4 years | £9.33 | £5.00 | £5.41 | £10.00 | £6.00 | £5.70 | £8.50 | £4.50 | £4.62 |
| 5 – 11 years | n/a | n/a | n/a | n/a | n/a | n/a | £8.50 | £4.50 | £4.91 |

Table 11 indicates that the highest average hourly childcare fees within the Royal Borough of Windsor and Maidenhead locality, in summer 2018, are observable within the PVI early years childcare sector – with the average fee levels decreasing as an age range increases.

Since the 2016 CSA it was observed that the average hourly fees within the PVI early years childcare sector had increased by approximately 0.60p/hour. However, the average hourly fees charged by registered childminders had remained at approximately £5.70/hour.

2.4 Provision of funded entitlement places – and feedback about the evolving 30 hours childcare offer

- 2.4.1 All *responding* early years childcare providers were invited to state whether they were offering 30 hours childcare places at their setting in summer 2018. 78% of such respondents stated that they were and 22% of such respondents stated that they were not.

Table 12 below indicates relevant responses aligned to the 23 wards...

Table 12 - Incidence of take-up and potential future provision of 30 hours childcare offer places – as stated by responding early years childcare providers/settings in summer 2018

| Ward | Number of 30 hours childcare place children <i>on roll</i> in summer 2018 stated by <i>responding</i> early years childcare providers | Number of <i>responding</i> early years childcare providers who stated that they intended to increase the number of 30 hours childcare places they offer in 2018 – 2019... | ...Number of additional places that applicable early years childcare providers evidently intend to develop during the period 2018 – 2019 |
|---------------------------|---|--|--|
| Ascot & Cheapside | 56 | 1 | 1 |
| Belmont | 16 | 0 | 0 |
| Bisham & Cookham | 27 | 1 | 4 |
| Boyn Hill | 86 | 0 | 0 |
| Bray | 26 | 0 | 0 |
| Castle Without | 78 | 1 | 2 |
| Clewer East ⁴ | n/a | n/a | n/a |
| Clewer South | 34 | 0 | 0 |
| Clewer North | 52 | 0 | 0 |
| Cox Green | 13 | 0 | 0 |
| Datchet | 8 | 0 | 0 |
| Eton & Castle | 17 | 0 | 0 |
| Eton Wick | 10 | 0 | 0 |
| Furze Platt | 1 | 0 | 0 |
| Horton & Wraysbury | 22 | 0 | 0 |
| Hurley & Walthams | 68 | 0 | 0 |
| Maidenhead Riverside | 33 | 0 | 0 |
| Old Windsor | 33 | 0 | 0 |
| Oldfield | 57 | 1 | 1 |
| Park ⁵ | n/a | n/a | n/a |
| Pinkneys Green | 3 | 0 | 0 |
| Sunningdale | 20 | 1 | 16 |
| Sunninghill & South Ascot | 35 | 1 | 4 |
| Total | 695 | 6 | 28 |

⁴ Note: a response from (the relatively low number of) applicable providers located in the ward was not attained for the 2018 CSA.

⁵ Note: a response from (the relatively low number of) applicable providers located in the ward was not attained for the 2018 CSA.

Table 12 indicates that the three wards which accounted for the highest number of 3 and 4 year olds on roll, and occupying 30 hours childcare offer places within early years childcare sector settings in summer 2018 were (situated in the Maidenhead vicinity and were):

1. Boyn Hill
2. Hurley and Walthams
3. Oldfield

Additionally, the ward which accounted for the highest number of *envisaged* additional 30 hours childcare offer places to accrue for the period 2018 – 2019 as a result of further business modelling by the Royal Borough’s early years childcare providers/settings was Sunningdale ward, in the Ascot vicinity.

- 2.4.2 All *responding* early years childcare providers that *offered* 30 hours childcare places were invited to state whether they had a set/definite number of such places in summer 2018. 12.5% stated that they did have a set/definite number of places that they offered – and 87.5% stated that they did not.
- 2.4.3 All *responding* registered childminders were invited to state whether they were offering 30 hours childcare places at their setting in summer 2018. 43% of such respondents/individuals stated that they were and 57% of such respondents stated that they were not.

Table 13 below indicates relevant responses aligned to the 23 wards...

Table 13 - Incidence of take-up and potential future provision of 30 hours childcare offer places – as stated by responding registered childminders in summer 2018

| Ward | Number of 30 hours childcare place children <i>on roll</i> in summer 2018 stated by <i>responding</i> registered childminders | Number of <i>responding</i> registered childminders who stated that they intended to increase the number of 30 hours childcare places they offer in 2018 – 2019... | ...Number of additional places that applicable registered childminders evidently intend to develop during the period 2018 – 2019 |
|-----------------------------|---|--|--|
| Ascot & Cheapside | 0 | 0 | 0 |
| Belmont | 3 | 0 | 0 |
| Bisham & Cookham | 1 | 0 | 0 |
| Boyn Hill | 2 | 0 | 0 |
| Bray | 6 | 2 | 2 |
| Castle Without ⁶ | n/a | n/a | n/a |
| Clewer East | 0 | 0 | 0 |
| Clewer South | 6 | 0 | 0 |
| Clewer North | 3 | 0 | 0 |
| Cox Green | 5 | 0 | 0 |
| Datchet | 0 | 0 | 0 |

⁶ Note: the one childminder evidently operating in the ward was not available to inform the 2018 CSA.

| Ward | Number of 30 hours childcare place children on roll in summer 2018 stated by responding registered childminders | Number of <i>responding</i> registered childminders who stated that they intended to increase the number of 30 hours childcare places they offer in 2018 – 2019... | ...Number of additional places that applicable registered childminders evidently intend to develop during the period 2018 – 2019 |
|---------------------------|---|--|--|
| Eton & Castle | 0 | 0 | 0 |
| Eton Wick | 0 | 0 | 0 |
| Furze Platt | 3 | 0 | 0 |
| Horton & Wraysbury | 0 | 0 | 0 |
| Hurley & Walthams | 12 | 2 | 2 |
| Maidenhead Riverside | 1 | 0 | 0 |
| Old Windsor | 5 | 1 | 1 |
| Oldfield | 4 | 1 | 1 |
| Park | 1 | 0 | 0 |
| Pinkneys Green | 9 | 0 | 0 |
| Sunningdale | 4 | 0 | 0 |
| Sunninghill & South Ascot | 1 | 0 | 0 |
| Total | 66 | 6 | 6 |

Table 13 indicates that the three wards which accounted for the highest number of 3 and 4 year olds on roll, and occupying 30 hours childcare offer places with registered childminders in summer 2018 were:

1. (The relatively large geographical area of) Hurley and Walthams and the bordering...
2. Bray ward
3. Clewer South

Finally the table indicates that 0 registered childminders were providing 30 hours childcare offer places or envisaged that they would be introducing additional 30 hours childcare places for the period 2018 – 2019 in the following wards:

- Ascot & Cheapside
- Clewer East
- Datchet
- Eton Castle
- Eton Wick
- Horton and Wraysbury

- 2.4.4 All *responding* registered childminders that *provided* the 30 hours childcare offer were invited to state whether they had a set/definite number of such places. 22% stated that they did have a set/definite number of places that they offered – and 78% stated that they did not.

2.4.5 All *responding* and applicable (a) early years childcare providers and (b) registered childminders were invited to state whether they had any vacant 30 hour childcare offer places in summer 2018...

Table 14 - Incidence of any vacant 30 hours childcare offer places being experienced by relevant early years childcare providers and registered childminders in summer 2018

| Ward | Number of vacant 30 hours childcare places evidently being experienced by relevant <i>responding</i> early years childcare providers in summer 2018 | Number of vacant 30 hours childcare places evidently being experienced by relevant <i>responding</i> registered childminders in summer 2018 |
|---------------------------|---|---|
| Ascot & Cheapside | 9 | 0 |
| Belmont | 0 | 0 |
| Bisham & Cookham | 6 | 0 |
| Boyn Hill | 8 | 0 |
| Bray | 0 | 0 |
| Castle Without | 21 | 0 |
| Clewer East | n/a | 0 |
| Clewer South | 6 | 0 |
| Clewer North | 8 | 0 |
| Cox Green | 0 | 2 |
| Datchet | 4 | 0 |
| Eton & Castle | 0 | 0 |
| Eton Wick | 3 | 0 |
| Furze Platt | 0 | 0 |
| Horton & Wraysbury | 7 | 0 |
| Hurley & Walthams | 0 | 2 |
| Maidenhead Riverside | 2 | 0 |
| Old Windsor | 8 | 0 |
| Oldfield | 3 | 1 |
| Park | 0 | 0 |
| Pinkneys Green | 0 | 3 |
| Sunningdale | 16 | 0 |
| Sunninghill & South Ascot | 7 | 0 |
| Total | 108 | 8 |

Table 14 indicates that the three wards which accounted for the highest number of vacant 30 hours childcare offer places – when combining both types of responding childcare provider – in summer 2018 were:

1. Castle Without
2. Sunningdale
3. Ascot and Cheapside

2.4.6 All *responding* and applicable (a) early years childcare providers and (b) registered childminders were invited to state whether they believed that they were able to meet the demand for 30 hours childcare offer places, that they were receiving, in summer 2018 – see Table 16.

Table 15 - Indication of where localised (a) early years childcare providers/settings and (b) registered childminders believed that they could meet the demand that they were receiving for 30 hours childcare places, in summer 2018

| Ward | Early Years Childcare Providers/Settings providing 30 hours places | | | Registered Child providing 30 hours places minders | | |
|---------------------------|--|---|------------|--|---|------------|
| | % Yes we are able to meet demand for 30 hrs childcare in summer 2018 | % No we are not able to meet demand for 30 hrs childcare in summer 2018 | Don't Know | % Yes we are able to meet demand for 30 hrs childcare in summer 2018 | % No we are not able to meet demand for 30 hrs childcare in summer 2018 | Don't Know |
| Ascot & Cheapside | 50% | 50% | 0 | 100% | 0 | 0 |
| Belmont | 50% | 50% | 0 | 67% | 33% | 0 |
| Bisham & Cookham | 50% | 50% | 0 | 100% | 0 | 0 |
| Boyn Hill | 60% | 40% | 0 | 50% | 0 | 50% |
| Bray | 50% | 50% | 0 | 100% | 0 | 0 |
| Castle Without | 56% | 22% | 22% | n/a | n/a | n/a |
| Clewer East | n/a | n/a | n/a | 75% | 25% | 0 |
| Clewer South | 67% | 33 | 0 | n/a | n/a | n/a |
| Clewer North | 75% | 25% | 0 | 0 | 100% | 0 |
| Cox Green | 50% | 50% | 0 | 100% | 0 | 0 |
| Datchet | 75% | 0 | 25% | 100% | 0 | 0 |
| Eton & Castle | 50% | 50% | 0 | 100% | 0 | 0 |
| Eton Wick | 100% | 0 | 0 | n/a | n/a | n/a |
| Furze Platt | 50% | 50% | 0 | 100% | 0 | 0 |
| Horton & Wraysbury | 75% | 25% | 0 | n/a | n/a | n/a |
| Hurley & Walthams | 71% | 29% | 0 | 100% | 0 | 0 |
| Maidenhead Riverside | 100% | 0 | 0 | 100% | 0 | 0 |
| Old Windsor | 33% | 67% | 0 | 100% | 0 | 0 |
| Oldfield | 50% | 50% | 0 | 67% | 0 | 33% |
| Park | n/a | n/a | n/a | 0 | 100% | 0 |
| Pinkneys Green | 0 | 100% | 0 | 33% | 50% | 17% |
| Sunningdale | 100% | 0 | 0 | 100% | 0 | 0 |
| Sunninghill & South Ascot | 83% | 17% | 0 | 100% | 0 | 0 |

Further analysis indicated that there were eight wards where 2 or more responding early years childcare providers/setting stated: No – we are not able to meet demand. These were:

1. Ascot and Cheapside – stated, in fact, by 3 responding early years childcare providers
2. *Oldfield – also stated, in fact, by 3 responding early years childcare providers
3. *Bisham and Cookham

4. *Boyn Hill
5. *Bray
6. Castle Without
7. Hurley and Walthams
8. Old Windsor

It can be observed that a collective number of such providers were evidently located in the Maidenhead vicinity of the Royal Borough – i.e. see * above.

In terms of the applicable responding registered childminders it was observed that 3 of the 6 located in the Pinkneys Green stated: No – I am not able to meet demand... and that both of the applicable childminders located in the Clewer North ward made the same statement.

- 2.4.7 All *responding* and applicable (a) PVI sector early years childcare providers and (b) registered childminders were invited to state approximately how many 3 and 4 year olds currently pay for additional hours above their 30 hours childcare place, at their care in summer 2018.

The *responding/applicable* PVI sector early years childcare providers most frequently stated four of their 3 and 4 year olds. The average number was five.

The *responding/applicable* registered childminders most frequently stated one of their 3 and 4 year olds. The average number was also one.

The three wards which accounted for the highest incidence of PVI sector early years childcare providers having 3 and 4 year olds currently paying for additional hours above their 30 hours childcare place(s) were:

- Ascot and Cheapside
- Castle Without
- Oldfield

- 2.4.8 All *responding* and applicable (a) early years childcare providers and (b) registered childminders were invited to state approximately how many of their 30 hours children split their hours between their provision and another childcare provider?

The early years childcare providers/settings most frequently stated one, of their 3 and 4 year olds. The average number was 2.5 (children).

The *responding/applicable* registered childminders also most frequently stated one, of their 3 and 4 year olds. The average number in this case was 1.5 (children)

- 2.4.9 All *responding* and applicable (a) early years childcare providers and (b) registered childminders were invited to outline whether they had – in summer 2018 – any partnership arrangements with other childcare providers, which allowed/enabled parents to use their 30 hours with *more than one provider*.

53% of early years childcare providers/settings stated that they did have such partnership arrangements – and 47% evidently did not. Those early years childcare providers/settings who did evidently have a partnership arrangement in summer 2018 most frequently stated that this was with another day nursery, followed in frequency by being with a registered childminder. There was (only) two examples of a partnership arrangement existing with an out of school childcare provider – in both cases, with an after school club.

The early years childcare providers/settings that had not evolved partnership arrangements aligned to the 30 hours childcare offer were asked whether they would be interested in developing such a partnership.

31% of applicable childcare providers stated: Yes, 31% stated: Maybe and 38% stated: No. The highest incidence of a statement of: Yes or: Maybe was observed in the Maidenhead locality and its immediate suburbs.

- 2.4.10 65% of registered childminders stated that they did have partnership arrangements aligned to the 30 hours childcare offer – and 35% evidently did not. Those registered childminders that did evidently have a partnership arrangement in summer 2018 most frequently stated that this was with a day nursery, followed in frequency by being with a pre-school/playgroup. There were (only) two examples of a partnership arrangement existing between two responding childminders.

The registered childminders who had not evolved partnership arrangements aligned to the 30 hours childcare offer were asked whether they would be interested in developing such a partnership.

50% stated: Yes, 36% stated: Maybe and 14% stated: No.

The highest incidence of a statement of: Yes, or: Maybe was observed in the following two bordering wards:

1. Hurley and Walthams
2. Pinkneys Green

- 2.4.11 All *responding* and applicable (a) early years childcare providers and (b) registered childminders were requested to state whether they believed that 1. themselves and/or 2. their parents would continue to benefit from more information about the 30 hours childcare offer, including going in to 2018 – 2019, the second year of full roll out...

Table 16 overleaf indicates the frequency with which both types of childcare provider considered that they, themselves, would benefit from the receipt of information about specific features of the 30 hours childcare offer.

Table 16 - Frequency with which both types of childcare provider considered that they would benefit from the receipt of information about a specific feature of the 30 hours childcare offer

| Feature/element of the 30 hours childcare offer | Percentage of responding early years childcare providers/settings stating that they would continue to benefit from (more) information about... | Percentage of responding registered childminders stating that they would continue to benefit from (more) information about... |
|---|--|---|
| Understanding the eligibility criteria | 21% | 17% |
| Accessing or using the government's eligibility checker | 17% | 12% |
| Accessing or using the early years hub/claims portal | 16% | 14% |
| Partnership arrangements between childcare providers | 14% | 15% |
| Grace periods | 14% | 10% |
| When to make extra charges | 11% | 7% |
| Other | 3% | 12% ⁷ |
| None of the above | 63% | 66% |

Note: a number of respondents/childcare providers wished to provide multiple options.

Table 16 indicates that the most frequent feature/element of the 30 hours childcare offer that early years childcare providers considered that they would (still) benefit from (more/continued) information about was: understanding the eligibility criteria, followed in frequency by: accessing or using the government's eligibility checker.

The most frequent feature/element of the 30 hours childcare offer that registered childminders considered that they would (still) benefit from (more/continued) information about was: (them) understanding the eligibility criteria, followed in frequency by: developing partnership arrangements.

⁷ Repeatedly: "Difficulties acquiring relevant administrative forms/paperwork".

Table 17 indicates the frequency with which both types of childcare provider considered that their parents would benefit from the receipt of information about specific features/elements of the 30 hours childcare offer.

Table 17 - Frequency with which early years childcare providers and registered childminders considered that their parents would benefit from the receipt of information about a specific feature of the 30 hours childcare offer

| Feature/element of the 30 hours childcare offer | Percentage of responding early years childcare providers stating that their parents would continue to benefit from (more) information about... | Percentage of responding registered childminders stating that their parents would continue to benefit from (more) information about... |
|--|--|--|
| Understanding the eligibility criteria | 58% | 17% |
| Accessing or using the government's eligibility checker | 44% | 12% |
| Accessing or using the early years hub/claims portal | 41% | 12% |
| Reconfirming eligibility (every 3 months) | 52% | 12% |
| Using more than one childcare provider/splitting the hours | 32% | 15% |
| Grace periods | 29% | 10% |
| Extra charges | 33% | 15% |
| Other | 1.5% | 22% |
| None of the above | 27% | 49% |

Table 17 indicates that the most frequent feature/element of the 30 hours childcare offer that early years childcare providers considered that their parents would (still) benefit from (more/continued) information about was: understanding the eligibility criteria, followed in frequency by: reconfirming eligibility (every 3 months). The most frequent feature/element of the 30 hours childcare offer that registered childminders considered that their parents would (still) benefit from (more/continued) information about was also: understanding the eligibility criteria, followed in frequency by: using more than one childcare provider/splitting the hours.

2.4.12 All *responding* and applicable (a) early years childcare providers and (b) registered childminders were requested to outline what they believed (any) key challenges had been in terms of their implementation and delivery of the 30 hours childcare offer in its first year of full national roll-out, including across the Royal Borough of Windsor and Maidenhead. They were also invited to describe any associated barriers to accessing the 30 hours childcare offer, which they believed that their parents and other local parents/families may have experienced.

The most frequent statement was (words to the effect) *“The initial issuing of eligibility”*.

For example, specific feedback included:

“The initial term felt like the worse period... but we are now quite used to it [eligibility administration]”.

“Most parents ‘in this area’ are not actually eligible... I think ‘Windsor and Maidenhead’ is probably one of the few areas where that is the case”.

The second most frequent statement was (words to the effect) *“[Us, providers] getting used to the additional paperwork”*.

The third most frequent statement was (words to the effect) *“The need to chase parents for their eligibility codes”*.

For example, specific feedback included:

“Some parents seem to think that it is our job to attain the eligibility code...”

“Getting some parents to renew has become an ‘unwanted’ extra job for us”.

“Some parents have had quite a delay receiving their eligibility codes... and we can see how frustrating this is for them”.

“We spend too much time chasing parents for their ‘renewal’ details”.

The fourth most frequent statement was (words to the effect) *“Parents not being sure if they are eligible”*.

For example, specific feedback included:

“Some parents have believed it is our responsibility to see if they are eligible”.

“Parents [in my opinion] need more information... especially those that think it is ‘free’ all year”.

Additional *repeated* feedback included (words to the effect):

“Organising lunchtime cover has been a challenge”.

“Some parents have just expected us to be able to offer them a place without any ‘due process’”.

“We know that quite a few parents are not eligible due to the size of their earnings... and they are not happy about this”.

“Some of our EAL parents struggle understand the eligibility criteria and the application process”.

Examples of *specific* feedback included:

“Some of our self employed parents have found the application process more complicated than other parents”.

“We find the administration of ‘stretch provision’ rather complicated”.

Finally, the most frequent type of feedback given by childminders was (words to the effect):

“The funding amount is insufficient”.

- 2.4.13 All *responding* (a) early years childcare providers and (b) registered childminders who were not (yet) offering 30 hour childcare offer places in summer 2018 were requested to outline under what circumstances they would consider doing so.

32% of applicable early years childcare providers and registered childminders stated: If we/I had the demand from parents

16% of applicable early years childcare providers and registered childminders stated: If it helped our/my business

18% of applicable early years childcare providers and registered childminders stated: If we were/I was confident it would not cause us/me any sustainability concerns

12% of applicable early years childcare providers/settings and registered childminders stated: If I were confident it would not add to our paperwork and administration tasks (indeed, only registered childminders provided this response)

A number of additional responses were provided, most frequently (words to the effect from representatives of PVI sector early years childcare providers/settings) *“If the funding level was paid at a higher hourly rate”.*

Two other repeated responses provided were (words to the effect):

“We won’t... because we/I only offer part-time places”.

“... only if we/I needed more children”.

2.4.14 Additionally all *responding* (a) early years childcare providers and (b) registered childminders who were not (yet) offering 30 hour childcare offer places (in summer 2018) were asked whether they believed that they would begin to provide 30 hours childcare places at some point (i.e. autumn, spring or summer) in 2018 – 2019.

- 5% of applicable responding early years childcare providers/settings stated: Yes (and the applicable maintained school nursery class was located in the Furze Platt ward)
 - 5% of applicable responding early years childcare providers/settings stated: Maybe (and the applicable maintained school nursery class was located in the Eton and Castle ward)
 - 83% of applicable responding early years childcare providers/settings stated: No
 - 7% of applicable responding early years childcare providers/settings stated: Don't Know
-
- 0 of applicable responding registered childminders stated: Yes
 - 26% of applicable responding registered childminders stated: Maybe – and they were most frequently located in the Maidenhead vicinity of the Royal Borough
 - 68% of applicable responding registered childminders stated: No
 - 6% of applicable responding registered childminders stated: Don't Know

2.5 Funded entitlements for 2, 3 and 4 year olds

2.5.1 All *responding* (a) early years childcare providers and (b) registered childminders were requested to state whether they were providing funded entitlement for 2 year old places, in summer 2018.

74% of (mostly PVI sector) early years childcare providers/settings stated they were providing funded entitlement for 2 year old places, in summer 2018 – and 26% stated that they were not.

Additionally, 16% of registered childminders stated they were providing funded entitlement for 2 year old places, in summer 2018 – and 84% stated that they were not.

The average number of 2 year olds evidently on roll at relevant PVI sector early years childcare providers/settings was 2 – with the most frequently stated number being 1. The average number of 2 year olds evidently on roll at relevant registered childminders was <1– with the most frequently stated number being 1.

Finally, it was observed that 33% of the early years childcare providers/settings stated that they *were not* – in summer 2018 – able to meet the demand that they were receiving from parents for funded entitlement for 2 year old places – with a relatively high incidence of such settings being located in the (geographically broad) Hurley and Waltham's ward.

- 2.5.2 All *responding* (a) early years childcare providers and (b) registered childminders were requested to state whether they were providing 15 hours funded entitlement for 3 and 4 year old places, in summer 2018.

100% of early years childcare providers/settings stated they were providing 15 hours funded entitlement for 3 and 4 year old places, in summer 2018.

The average number of 3 and 4 year old evidently on roll at relevant PVI sector early years childcare providers/settings was 18 – with the most frequently stated number being 17 and with equal frequency 18.

The average number of 3 and 4 year old evidently on roll with relevant registered childminders was <1– with the most frequently stated number being 0.

Finally, it was observed that 25% of the early years childcare providers stated that they *were not* – in summer 2018 – able to meet the demand that they were receiving from parents for 15 hours funded entitlement for 3 and 4 year old places – with a relatively high incidence of such settings being located in the bordering (Maidenhead locality) wards of Oldfield and Boyn Hill.

2.6 Funded entitlements – additional feedback

- 2.6.1 All *responding* early years childcare providers were invited to state whether they had ever received any additional funding to support children with special education needs and disabilities (SEND), either through the Disability Access Fund (DAF) or from the Royal Borough of Windsor and Maidenhead.

27% of responding early years childcare providers stated that they had received such additional funding – and 73% stated that they had not. Those early years childcare providers/settings stated that they had received such additional funding most frequently via the Disability Access Fund, which had evidently benefitted their setting in the following ways (words to the effect):

“It has helped us to provide 1 : 1 childcare”.

“We have used it to purchase sensory equipment”.

“It has helped to fund staff training”.

The second most frequent type of applicable funding that they had received was via/directly from the Royal Borough of Windsor and Maidenhead, which had evidently benefitted their setting in the following ways (words to the effect):

(Once again) *“It has helped us to provide 1 : 1 childcare”.*

“We have used it to bring in [SEN] specialists”.

2.6.2 All *responding* (a) early years childcare providers/settings and (b) registered childminders who were providing at least one of the funded entitlements were invited to state whether they applied any additional costs for funded places – for example, charges for food, outings and nursery resources. 68% of applicable respondents did apply additional costs, which evidently were (in order of frequency):

- Food and meals – stated by 35% of applicable childcare providers
- Outings and trips – stated by 34% of applicable childcare providers
- “*Activities*” – stated by 10% of applicable childcare providers
- “*A lunch club*” – stated by 9% of applicable childcare providers
- “*Ingredients for cooking*” – stated by 9% of applicable childcare providers

2.6.3 All *responding* and applicable (a) early years childcare providers and (b) registered childminders were requested to confirm whether they had received the early years pupil premium (EYPP) at their setting? 40% of childcare providers stated that they had received the early years pupil premium (EYPP) and they described the following perceived strengths and weaknesses of the funded...

...Perceived strengths of the EYPP:

Most frequently (words to the effect): “*It has been beneficial... and has worked well*”.

Additional repeated feedback was (words to the effect):

- “*It has helped us/me purchase equipment*”.
- “*It has been a relatively smooth process to receive the funding*”.
- “*It has contributed towards [staff] training*”.

...Perceived weaknesses of the EYPP:

Most frequently (words to the effect): “*It has not been sizeable enough to make a ‘real difference’*”.

Additional repeated feedback was (words to the effect):

- “*It could be targeted better... some settings [in my opinion] do not need it*”.
- “*The information about the EYPP could be ‘clearer’*”.

2.6.4 All *responding* (a) early years childcare providers/settings and (b) registered childminders who were providing at least one of the funded entitlements were invited to state whether they considered that the advent of the 30 hours childcare offer had resulted in any (early) positive, or negative, effects on the funded entitlement for 2 year olds and or the 15 hours funded entitlement for 3 and 4 year olds.

The most frequent statement was (words to the effect) “*There has been no effect on the other two entitlements*” – stated by 73% of applicable childcare providers.

The second most frequent statement was only stated by eight registered childminders and was (words to the effect) “*It has had a negative effect due to the time that it takes to receive the funding*”.

For example, specific feedback included:

“It concerns me that more childminders will stop providing childcare because of the delay in funded childcare payments”.

“The time it takes us to ‘get paid’ is basically [in my opinion] too slow”.

The third repeated statement was (words to the effect) “*It has only been positive in its effects*”.

2.7 Incidence of observed trends since 2016

2.7.1 All responding childcare providers and registered childminders were requested to outline whether, since summer 2016, they had witnessed any *notable* (and new) trend(s) – including in terms of the circumstances of and backgrounds of families accessing their provision.

43% of early years childcare providers responded that, in the two years since summer 2016, they *had* witnessed a *notable* trend(s). The three most frequent types of trends stated by early years childcare providers/settings were (in order of frequency):

1. Receipt of more “*enquiries*” for places for 2 year olds (up to places since the 2016 CSA)
2. An increased demand – in general – for their provision (a new entry in to the ‘top 3’, though was the most frequent statement made by registered childminders in 2016)
3. A increased demand for full-time childcare places/hours during term-time (a new entry in to the ‘top 3’)

2.7.2 41% of registered childminders responded that, in the two years since summer 2016, they had witnessed a *notable* trend(s).

The three most frequent types of trends stated by registered childminders were:

1. An increased demand – in general – for funded entitlement places (a new entry in to the ‘top 3’)
2. We have seen a greater demand from families for flexible childcare places (a new entry in to the ‘top 3’)
3. Parents becoming (words to the effect) “*more demanding*” (a new entry in to the ‘top 3’)

2.7.3 56% of out of school childcare providers responded that, in the two years since summer 2016, they had witnessed a *notable* trend(s). The three most frequent types of trends stated by out of school childcare providers were:

1. An increased demand – in general (also the most frequent statement in 2016)
2. We have seen a decreasing demand for our provision on Fridays (a new entry in to the ‘top 3’)
3. An increased demand for later, post 6.00pm pick-ups/closing times (a new entry in to the ‘top 3’ stated by after school clubs and holiday playschemes)

2.8 Perceptions on how demand may modify between 2018 → 2020

2.8.1 All childcare providers and registered childminders were requested to state/qualify how much higher or lower they expected the demand for their provision/daycare places to be in summer 2020 – i.e. two years hence.

Table 18 outlines the responses/sector...

Table 18 - Extent to which daycare providers and registered childminders believed demand for (their) childcare would differ (or remain the same) in summer 2020

| Classification of perceived demand in 2020 | Early Years Childcare Sector | Registered Childminders | Out of School Childcare Providers |
|--|------------------------------|-------------------------|-----------------------------------|
| Significantly higher | 11% | 14% | 33% |
| Higher – but not significantly | 22% | 30% | 24% |
| About the same | 32% | 28% | 21% |
| Lower – but not significantly | 6% | 9% | 0 |
| Significantly lower | 2.5% | 5% | 0 |
| Don't know | 26% | 15% | 22% |
| Rather not say | 0 | 0 | 0 |

2.8.2 Table 18 indicates that the:

- Royal Borough of Windsor and Maidenhead’s early years childcare providers/settings most frequently expected demand to be higher – about the same, in summer 2020... however, Royal Borough of Windsor and Maidenhead’s early years childcare providers/settings (as opposed to registered childminders, in 2016) most frequently expressed uncertainty through an answer of: don’t know
- Royal Borough of Windsor and Maidenhead’s out of school childcare sector also most frequently expected demand to be significantly higher in summer 2020
- Royal Borough of Windsor and Maidenhead’s registered childminders most frequently expected demand to be higher – but not significantly, in summer 2020...

2.9 Perceptions on future sustainability

2.9.1 All responding early years childcare providers/settings and registered childminders were requested to state/quantify how long they *expected* to (continue to) be providing childcare?

Table 19 - Length of time that daycare providers and registered childminders anticipated their sustainability and operation would continue

| Length of time | Early Years Childcare Sector | Registered Childminders | Out of School Childcare Providers |
|---------------------|------------------------------|-------------------------|-----------------------------------|
| Less than 2 years | 0 | 13% | 0 |
| Up to 3 years | 1% | 9% | 3% |
| Up to 4 years | 1% | 9% | 0 |
| Up to 5 years | 2% | 16% | 0 |
| Longer than 5 years | 80% | 33% | 76% |
| Can't say | 15% | 21% | 21% |
| Rather not say | 1% | 0 | 0 |

2.9.2 Table 19 indicates that the:

- Royal Borough of Windsor and Maidenhead's early years childcare sector most frequently expected to be sustainable and operating for longer than 5 years
- Royal Borough of Windsor and Maidenhead's out of school childcare sector also most frequently expected to be sustainable and operating for longer than 5 years
- Royal Borough of Windsor and Maidenhead's registered childminders also most frequently expected to be sustainable and operating for longer than 5 years – however, as with the 2016 CSA, this form of provision did account for the highest incidence of what could be termed (percentage-based) sustainability concerns

2.10 Perceptions on existing sufficiency of childcare

2.10.1 Table 20 indicates the extent to which early years childcare providers and registered childminders currently consider that – from their perspective – there is sufficiency of specific types of childcare places (denoted in column A) within *their immediate geographical area*.

Table 20 - Extent to which early years childcare providers and registered childminders operating in Royal Borough of Windsor and Maidenhead currently consider there is sufficiency of childcare places for 0 – 5 year olds and children with special needs, disabilities and complex medical needs

| Age groups of childcare places | Early Years Childcare Sector | Registered Childminders |
|---|------------------------------|-------------------------|
| Yes there is sufficiency of places for 0 – 12 months in my immediate geographical area | 40% | 68% |
| No there is not sufficiency of places for 0 – 12 months in our immediate geographical area | 17% | 27% |
| Don't Know whether there is sufficiency of places for 0 – 12 in our immediate geographical area | 43% | 5% |
| 1 year olds | | |
| Yes there is sufficiency of places for 1 year olds in our immediate geographical area | 41% | 70% |
| No there is not sufficiency of places for 1 olds in our immediate geographical area | 18% | 23% |
| Don't Know whether there is sufficiency of places for 1 year olds in our immediate area | 41% | 6% |
| 2 year olds | | |
| Yes there is sufficiency of places for 2 year olds in our immediate geographical area | 59% | 70% |
| No there is not sufficiency of places for 2 olds in our immediate geographical area | 22% | 23% |
| Don't Know whether there is sufficiency of places for 2 year olds in our immediate area | 19% | 6% |
| 3 and 4 year olds | | |
| Yes there is sufficiency of places for 3 and 4 olds in our immediate geographical area | 70% | 71% |
| No there is not sufficiency of places for 3 and 4 olds in our immediate geographical area | 15% | 21% |
| Don't Know whether there is sufficiency of places for 3 and 4 year olds in our immediate geographical area | 15% | 7% |

| Age groups of childcare places | Early Years Childcare Sector | Registered Childminders |
|---|------------------------------|-------------------------|
| Yes there is sufficiency of places for 5 year olds in our immediate geographical area | 53% | 66% |
| No there is not sufficiency of places for 5 olds in our immediate geographical area | 15% | 23% |
| Don't Know whether there is sufficiency of places for 5 year olds in our immediate area | 32% | 11% |
| Age groups of childcare places for children with SEND | | |
| Yes there is sufficiency of places for children with SEND in our immediate geographical area | 21% | 19% |
| No there is not sufficiency of places for children with SEND in our immediate geographical area | 42% | 35% |
| Don't Know whether there is sufficiency of places for SEND children in our immediate area | 37% | 46% |
| Age groups of childcare places for children with complex medical needs | | |
| Yes there is sufficiency of places for children with complex medical needs in our immediate geographical area | 21% | 20% |
| No there is not sufficiency of places for children with complex medical needs in our immediate geographical area | 43% | 33% |
| Don't Know whether there is sufficiency of places for children with complex medical needs in our immediate geographical area | 36% | 47% |

2.10.2 Table 20 indicates that approximately 2 : 5 of early years childcare providers *did not* feel that there were sufficient childcare places *in their immediate geographical area* for children with SEND and children with complex medical needs.

2.10.3 The responding out of school childcare providers were invited to give their feedback on localised sufficiency aligned to differing age categories.

32% of out of school childcare providers stated: Yes there is sufficient places for 0 – 4 year olds within our immediate geographical area. 34% of out of school childcare providers stated: No there is not sufficient places for 0 – 4 year olds within our immediate geographical area. 34% of such providers stated: Don't Know.

Additionally, 72% of out of school childcare providers stated: Yes there is sufficient places for 5 – 11 year olds within our immediate geographical area. 3% of out of school childcare providers stated: No there is not sufficient places for 5 – 11 year olds within our immediate geographical area. 25% of such providers stated: Don't Know.

19% of out of school childcare providers stated: Yes there is sufficient places for 12 – 16 year olds within our immediate geographical area. 16% of out of school childcare providers stated: No there is not sufficient places for 12 – 16 year olds within our immediate geographical area. 65% of such providers stated: Don't Know.

Finally, 22% of out of school childcare providers stated Yes there is sufficient places for children with SEND within our immediate geographical area. 50% of out of school childcare providers stated No there is not sufficient places for children with SEND within our immediate geographical area. 28% of such providers stated: Don't Know.

2.11 Perceptions on beneficial forms of support

2.11.1 Table 21 indicates the extent to which childcare providers and registered childminders stated that they felt their provision would benefit from specific types of support – potentially via the local authority

Table 21 - Extent to which childcare providers and registered childminders stated that they felt their provision would benefit from specific/targeted types of support

| Type of Support | Early Years Childcare Sector | Registered Childminders | Out of School Childcare Providers |
|---|------------------------------|-------------------------|-----------------------------------|
| 30 Hours Childcare | 1% | 11% | 9% |
| Recruitment and Retention | 20% | 2% | 16% |
| Training | 21% | 17% | 25% |
| Marketing support/advice | 6% | 4% | 6% |
| Business support/advice | 4% | 7% | 0 |
| Building alterations | 4% | 3% | 6% |
| Inspection/registration support/advice | 7.5% | 21% | 0 |
| Support to network with other providers/childminders | 0 | 3% | 3% |
| Support with setting up an After school club | 0 | 1% | 0 |
| Support with setting up a Breakfast club | 0 | 1% | 0 |
| Support with setting up a Holiday playscheme | 0 | 1% | 0 |
| Advice/support on needs of Children with special needs | 15% | 9% | 3% |
| Advice/support on providing childcare for complex medical needs | 12.5% | 6% | 3% |

2.11.2 Table 21 indicates that the three most frequent forms of specific/targeted support requested by (responding) members of Royal Borough of Windsor and Maidenhead's childcare sector were (in order of frequency):

1. Training
2. Recruitment and retention
3. Inspection/registration support/advice

It was observed that 49% of registered childminders also stated (words to the effect): *"more local training options during evenings and weekends"*.

3 Outcomes: Survey of Parents of 0 – 5 year olds Royal Borough of Windsor and Maidenhead

In summer 2018, 300 structured telephone interviews were completed with parents/carers of 0 – 5 year olds who were resident across the Royal Borough of Windsor and Maidenhead, in order to inform the 2018 Childcare Sufficiency Assessment.

A sampling framework was developed whereby:

- 100 interviewees/parents had at least one child aged 3 – 4 years who had accessed the 30 hours childcare offer in 2017 – 2018, its first year of national roll-out
- 100 interviewees/parents had at least one child aged 3 – 4 years who *had not* accessed the 30 hours childcare offer in 2017 – 2018
- 100 interviewees/parents had at least one child aged 0 – 2 years

This was developed in order to ensure coverage of the types of issues that the Royal Borough wished to examine for the 2018 Childcare Sufficiency Assessment, particularly around the evolving processes relevant to the localised 30 hours childcare offer. The following section below, 3.1 – 3.13 (pages 53 – 69), focuses on the feedback provided, including by those three cohorts of parents resident in the Royal Borough.

3.1 Circumstances of parents and any partners

Parents/respondents were asked to give a description which they believed *best described* their present circumstances/occupation.

Table 22 - Circumstances of responding parents

| Circumstances of Respondent | % of parents |
|--|--------------|
| In full-time employment/self-employment (30 hours+/week) | 47% |
| In part-time employment/self-employment (<30 hours/week) | 27% |
| Other self employed | 5% |
| Not currently in work (at home raising children) | 17% |
| Maternity/Paternity leave | 1% |
| Studying full-time | <1% |
| Volunteering | <1% |
| Other | 4% |

Note: a number of respondents/parents wished to provide multiple options.

Table 22 indicates that the most frequent classification made by a parent/respondent was them being in full-time employment/self-employment of over 30 hours/week.

The table also shows that 4 : 5 of the parents stated that they were *currently* in a type of paid employment – i.e. they were working parents⁸.

Parents/respondents were also asked to state a description which they believed *best described* the present circumstances/occupation of any partner. 93% of respondents had a partner and the incidence of their circumstances/occupation are presented in Table 23 below.

Table 23 - Circumstances of partners

| Circumstances of Partner | % of responses from applicable parents |
|--|--|
| In full-time employment/self-employment (30 hours+/week) | 80% |
| In part-time employment/self-employment (<30 hours/week) | 6% |
| Self employed | 5% |
| Not currently in work (at home raising children) | 4% |
| Studying full-time | 1% |
| Volunteering | 1% |
| Other | 3% |

Note: a number of respondents/parents wished to provide multiple options.

Table 23 indicates that the most frequent classification of a partner was them also being in full-time employment of over 30 hours/week. Indeed, the majority of partners were evidently *currently* in a type of paid employment – i.e. they were *also* working parents.

3.2 Annual Family Household Incomes

Table 24 - Annual family household incomes - (before) tax

| Annual Household income (Ranges) | Percentage of parents |
|----------------------------------|-----------------------|
| Up to £16,190 | 6% |
| £16,190 - £29,999 | 5% |
| £30,000 - £54,999 | 18% |
| £55,000 - £99,999 | 29% |
| £100,000 or above | 22% |
| I don't know | 5% |
| I would rather not say | 14% |

Table 24 indicates that the most frequent annual household income (before tax) of responding all parents was £55,000 – £99,999. 1 : 5 of the responding parents had an annual household income of £100,000 or over (which would affect their eligibility to receive the 30 hours childcare offer).

⁸ This was a relatively high percentage in the significant experience of PAG.

3.3 Ethnicity of Parents/Respondents

Table 25 - Ethnicity of responding parents

| Stated Ethnicity | Percentage of parents |
|-----------------------|-----------------------|
| White | |
| White UK | 67% |
| White Other | 3% |
| Asian | |
| Asian Bangladeshi | 0 |
| Asian Indian | 8% |
| Asian Pakistani | 3% |
| Asian Other | 3% |
| Black | |
| Black African | 0 |
| Black Caribbean | 1% |
| Black Other | <1% |
| Mixed | |
| Mixed White and Black | 1% |
| Mixed White and Asian | 1% |
| Other Mixed | 1% |
| Other | |
| Chinese | <1% |
| European | 5% |
| South American | 1% |
| Other | 1% |
| Rather not say | 5% |

Table 25 indicates that the most frequent ethnicity of the parents was White British (stated by two-thirds of parents), followed in frequency by Asian Indian (7% of parents).

3.4 Faith of Parents/Respondents

Table 26 - Faith of responding parents

| Stated Faith | Percentage of parents |
|----------------|-----------------------|
| Buddhist | <1% |
| Christian | 41% |
| Hindu | 3% |
| Jewish | <1% |
| Muslim | 4% |
| Sikh | 5% |
| No religion | 39% |
| Other | <1% |
| Rather not say | 8% |

Table 26 indicates that the most frequent faith of the responding parents was Christian (41% of parents), followed – marginally – in frequency by: no religion.

3.5 Incidence of children having SEND

All of the 300 parents/carers were invited to state whether at least one of their children had SEND. 4% of parents/carers stated that they were caring for at least one son or daughter with SEND and this incidence aligned to type of SEND is detailed in Table 28.

Table 27 - Incidence of responding parents/carers child having a specific type of SEND

| SEND type | Number of Parents/Carers |
|---|--------------------------|
| Speech, Language and Communication Difficulties | 5 |
| Other | 5 |
| Hearing Impairment | 2 |
| Global Development Delay | 1 |
| Autistic Spectrum Conditions | 1 |
| Profound and Multiple Learning Difficulties | 1 |

The 'Other' SEND types which were outlined included Angelman syndrome⁹ and Achondroplasia¹⁰.

Table 27 indicates that the type of SEND which responding the children aged 0 – 5 years of the responding parents/carers most frequently had was Speech, Language and Communication Difficulties.

⁹ a genetic disorder that mainly affects the nervous system.

¹⁰ a bone growth disorder that causes disproportionate dwarfism.

3.6 Usage of formal childcare

- 3.6.1 All 300 parents/carers of 0 – 5 year olds were invited to state whether they were accessing formal – registered with Ofsted – childcare in summer 2018. 82% of all parents were evidently accessing at least one type of formal childcare – including in a high number of cases a funded childcare places (as per the intentional sampling process) – see page 53.

Table 28 - Incidence of usage of formal childcare by responding parents of 0 – 5 year olds

| Type of formal early years childcare | Percentage of applicable parents accessing |
|--|--|
| PVI sector day nursery – full or part-time | 66% |
| Pre-school or playgroup i.e. sessional childcare | 16% |
| Maintained school nursery class | 8% |
| Nursery school/class in an independent school | 2% |
| Registered childminder – for under 8 year olds | 6% |
| After school club | 5% |
| Breakfast club | 3% |
| Holiday playscheme | 5% |
| Other ¹¹ | 3% |

Note: a number of respondents/parents wished to provide multiple options.

- 3.6.2 Table 28 indicates that the type of formal childcare which was most frequently being accessed by responding applicable parents in summer 2018 was a (full or part-time) place at a PVI sector day nursery, followed in frequency by a (sessional childcare providing) pre-school/playgroup. The consultation also accounted for circa 5% of parents of 0 – 5 year olds (already) accessing some form of out of school childcare.

The analysis indicated that the majority of parents (over 90%) who were resident in Ascot locality were accessing a PVI sector day nursery.

¹¹ In all cases “creche’ at work”

3.7 Experiences of formal childcare usage

- 3.7.1 The 82% of parents 0 – 5 year olds who stated that they were accessing at least one type of formal childcare in summer 2018 were invited to outline the number of hours/week they used it for in the term-time period and during (school) holidays.

For term-time(s), the average number of weekly hours stated was 27.5. The most frequent number of hours stated was, as would be expected – see page 60 – 30 followed by 15.

The following three wards accounted for applicable parents stating the *highest* average term-time hours:

1. Ascot and Cheapside
2. Sunninghill and South Ascot
3. Park

For holiday time(s), the average number of weekly hours stated was 20.5. The most frequent number of hours stated was 40.

The following three wards accounted for applicable parents stating the highest average holiday time hours:

1. Ascot and Cheapside
2. Sunninghill and South Ascot
3. Maidenhead Riverside

- 3.7.2 The parents of 0 – 5 year olds who stated that they were accessing at least one type of formal childcare in summer 2018 were invited to state approximately how much money they spent on childcare per week.

For term-time(s), 24% of applicable parents stated that they spent £0 and it can be assumed that the majority of such respondents were only accessing at least one type of funded early years childcare place. Of those who were paying for formal childcare during term-time(s), the average amount they spent per week was £165, and the most frequent recorded amount was £100.

For holiday-time(s), 33% of applicable parents stated that they spent £0. Of those who were paying for formal childcare during holiday-time(s), the average amount they spend per week was £158, and the most frequent recorded amount was £200 – i.e. double the most frequent amount stated for term-time(s). Indeed 5% of applicable parents stated that they were spending £300/week during the holiday period, on childcare.

3.7.3 Parents of 0 – 5 year olds who stated that they were accessing at least one type of formal childcare in summer 2018 were invited to state if *they* had ever experienced any barriers to accessing early years childcare. Table 30 presents the frequency with which they provided specific responses:

Table 29 - Incidence of barriers experienced by parents who were accessing at least type of formal childcare in summer 2018

| Barrier type | Percentage of applicable parents |
|---|----------------------------------|
| I could not/cannot find a space for my child at a chosen childcare provider | 13% |
| I could not/cannot find a childcare provider to offer the times/hours that I need | 14% |
| I could not/cannot afford the childcare that I require | 16% |
| I had doubts about the quality of provision | 10% |
| I did not know where to find information about childcare | 5% |
| Religious/cultural reasons | 1% |
| Preferred provider had a waiting list | 18% |
| Other | 12% |

Note: a number of respondents/parents wished to provide multiple options.

Encouragingly 53% of applicable parents/carers stated that they had not – at any point in time – experienced any of the barriers presented in Table 30 above. However, Table 30 indicates that the most frequent barrier that *had been* experienced by those parents/carers who were (nonetheless) accessing at least one type of formal early years childcare was: their preferred childcare provider had had a waiting list (1 : 5 of applicable respondents), followed in frequency by a relevant parent/carer being: unable to afford their preferred childcare.

The most frequent ‘Other’ barrier stated was (words to the effect) “*my preferred childcare provider is not offering 30 hours childcare*”.

- 3.7.4 Parents of 0 – 5 year olds who stated that they were accessing at least one type of formal childcare in summer 2018 were invited to state how satisfied they were with their present childcare arrangements. Table 31 presents the frequency with which they provided certain responses:

Table 30 - Satisfaction among users of formal childcare about their existing arrangements

| Degree of Satisfaction | Percentage of parents |
|------------------------|-----------------------|
| Very Satisfied | 51% |
| Quite Satisfied | 40% |
| Quite Dissatisfied | 6% |
| Very Dissatisfied | 2% |
| Not Sure | 1% |

Table 30 indicates that approximately 8% of users of formal childcare in summer 2018 were, to some degree, not satisfied with their current arrangements. The response: Quite or Very Dissatisfied, when provided, tended to originate from a respondent who was resident in the Maidenhead vicinity of the Royal Borough.

3.8 Feedback about the first year of the 30 Hours Childcare Offer

- 3.8.1 The sample of parents who had at least one child aged 3 – 5 years were invited to state whether they had accessed the 30 hours childcare offer during its first year of full roll-out, i.e. 2017 – 2018. 49% of all of the relevant responding parents had indeed accessed the 30 hours childcare offer during its first year of full roll-out...
- 3.8.2 The parents of 3, 4 and 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out, i.e. 2017 – 2018, were invited to state whether they considered that the 30 hours childcare offer had helped them and/or a partner to remain in work or to take up employment...

59% of applicable parents/carers stated:

Yes, it has helped me and/or a partner to remain in employment/self-employment/a job

5% of applicable parents/carers stated:

Yes, it has helped me and/or a partner to take up a part-time job/part-time self-employment

7% of applicable parents/carers stated:

Yes, it has helped me and/or a partner to take up a full-time job/full-time self-employment

29% of the applicable parents/carers responded that their circumstance(s) had not been affected by the childcare offer.

3.8.3 Additionally, the responding parents of 3, 4 and 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out, i.e. 2017 – 2018, within the Royal Borough, were invited to state how ‘easy’ they found securing a 30 hours childcare place...

- 24% of applicable parents/carers stated: it was very easy
- 30% of applicable parents/carers stated: It was fairly straightforward
- 27% of applicable parents/carers stated: It was not as easy as I would have liked
- 19% of applicable parents/carers stated: It was complicated and/or stressful

Those applicable parents/carers who stated (a) It was not as easy as I would have liked or (b) It was complicated and/or stressful were requested to state the reason(s) for their response.

The most frequent reason was evidently (words to the effect):
“The online eligibility portal... made it challenging”.

The second most frequent reason was evidently (words to the effect):
“The need to re-confirm eligibility... made it challenging”.

The third most frequent reason was evidently (words to the effect):
“I experienced a delay receiving the eligibility code”.

Additional *repeated* types of responses included:

“I found the whole experience ‘complex’”.

“The initial process was challenging... but it got easier when I became used to reconfirming, etc”.

“I have found splitting my hours between more than one provider... challenging”. Indeed...

3.8.4 ...The responding parents/carers of 3, 4 and 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out, i.e. 2017 – 2018, were invited to state the type of venue(s) where their child(ren) had attended such a place – see Table 31 below.

Table 31 - Frequency with which ‘users’ of the 30 hours childcare offer had therefore accessed – or were accessing – types of childcare provision during the period September 2017 – July 2018

| Type of early years childcare provider | Percentage of applicable parents |
|--|----------------------------------|
| PVI sector day nursery – full or part-time | 76% |
| Pre-school or playgroup i.e. sessional childcare | 16% |
| Maintained school nursery class | 6% |
| Nursery school/class in an independent school | 2% |
| Registered childminder | 4% |
| After school club | 1% |

Table 31 indicates that the type of Royal Borough-based early years childcare provider that was being accessed in 2017 – 2018 in order to take-up a 30 hours childcare offer place was – by a significant margin – a PVI sector day nursery, followed in frequency by a pre-school/playgroup. It was observed that (only) 4% of applicable parents/carers of 3 and/or 4 year olds had accessed a 30 hours childcare offer place at a registered childminder.

The same cohort of parents/carers were requested to confirm how many hours (up to 30) they had normally accessed, each applicable week. The most frequently stated number of such hours was – as would be expected – 30. The average number stated was 27 hours – and 45 minutes. Indeed 30 hours *was the only metric* stated by applicable respondents resident in the following (relatively geographically dispersed) wards:

1. Clewer East
2. Datchet
3. Eton and Castle
4. Furze Platt
5. Horton and Wraysbury
6. Oldfield

3.8.5 ...The responding parents/carers of 3, 4 and 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out, i.e. 2017 – 2018, were invited to outline whether they had, during that period, split their ‘30 hours’ across more than one childcare provider. (Only) 7% of applicable parents/carers stated that they had/did split their ‘30 hours’ across more than one childcare provider. The most frequent type of ‘split’ was 1. private day nursery with a 2. registered childminder.

3.8.6 Finally, the responding parents/carers of 3, 4 and 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out, i.e. 2017 – 2018, were invited to state whether they had, during that period, paid for any extra charges above their ‘30 hours’ such as lunch charges or extra hours. 45% of applicable parents/carers stated that they had. 55% of applicable parents/carers stated that they *had not*. Evidently the three most frequent type(s) of extra/additional charge, stated by relevant parents, had been (in order of frequency):

- Additional charge for wrap-around “care”
- Extra hours – on top of the 30 hours childcare offer place
- Lunchtime charge

3.8.7 ...51% of the 300 responding parents of 3, 4 and 5 year olds *had not* accessed the 30 hours childcare offer during its first year of full roll-out... Table 32 indicates the frequency with which reasons why this was the case were stated by applicable parents of 3, 4 and 5 year olds.

Table 32 - Reasons why parents of 3, 4 and 5 year olds had not accessed the 30 hours childcare offer (local places) during its first year of national roll out

| Reason | Percentage of applicable parents |
|--|----------------------------------|
| I do/did not think that I am/was eligible for the 30 hour childcare offer | 50% |
| I do/did not know if I am/was eligible to use the 30 hour childcare offer | 13% |
| I do/did not know how to register for the 30 hour childcare offer | 2% |
| I do/did not <i>need to</i> use the 30 hour childcare offer | 4% |
| I do/did not <i>want to</i> use the 30 hour childcare offer | 3% |
| I cannot/could not find a suitable childcare provider who offers a place | 7% |
| I cannot/could not find a childcare provider that can offer suitable times for me to use the 30 hour childcare offer | 3% |
| Extra charges made/make the 30 hours inaccessible for me, at my chosen provider | 2% |
| None of the above | 2% |
| Other | 22% |

Table 32 outlines that the most frequent reason why a responding parent of at least one child aged 3, 4 and/or 5 years was not, or had not, accessed the 30 hours childcare offer during its first year of roll-out within the Royal Borough was: I do/did not *think* that I am/was eligible for the 30 hour

childcare offer, followed in frequency by: I do/did *not know if I am/was* eligible to use the 30 hour childcare offer.

Those applicable parents/carers who stated 'Other' most frequently stated (words to the effect):

"My [3 year old] child is not eligible to start until September 2018".

The second most frequent 'Other' statement was (words to the effect):

"It is not financially beneficial to as [in my opinion] I am still having to work to pay for childcare".

Finally a number of applicable respondents stated (words to the effect):

"I prefer to use the 15 hours entitlement".

- 3.8.8 The responding parents of 3, 4 and 5 year olds who *had not* accessed the 30 hours childcare offer during its first year of full roll-out stated that if a 0 – 4 year old of theirs did so in the future, they most frequently envisaged that this would be at a PVI sector day nursery – and that they would seek to access the full 30 hours.

3.9 Qualitative feedback about the 30 hours childcare offer

- 3.9.1 All relevant parents/carers were invited to provide any specific/qualitative feedback about their evolving experiences of the 30 hours childcare offer. The most frequent type of response was (words to the effect):

"It has been a very good idea".

For example, specific responses included:

"My child will be 3 soon and I am very much looking forward to accessing 'my 30 hours'".

"This has been great from working parents".

The second most frequent type of feedback/response was (words to the effect): *"It has been a good source of financial support... helping me to access childcare [as opposed to employment]".*

The third most frequent type of feedback/response focused on the actual accomplishment of a successful eligibility process, and was (words to the effect):

"The 'application' process was 'difficult'".

On this theme specific responses included:

"We' would have liked more information at the start... although parents now seem to be getting used to [the processes] ".

"Renewing' my eligibility has been the main learning curve" and similarly,

“I really dislike having to reapply every 3 months”.

Two aligned/repeated types of responses, also outside of the scope of the Royal Borough to influence, were:

“30 hours per week is not enough...” and,

“The offer ‘should’ be all year round”.

- 3.9.2 A number of applicable responding parents also provided (continued) feedback about the 15 hours funded entitlement for 3 and 4 year olds. A message/theme emerged that the entitlement (in the words of one such respondent) *“should not get forgotten”* – with the most frequent types of response being (words to the effect):

“This is ‘still’ a great help” and,

“It’s good for my child to start learning at an early age”.

3.10 Usage of the 15 hours funded entitlement for 3 and 4 year olds

All responding parents/carers who were evidently accessing formal childcare and who had at least one child aged 3 and/or 4 years were invited to state whether they were accessing a 15 hours funded entitlement for 3 and 4 year olds place in summer 2018.

43% of applicable responding parents/carers stated that they were. 57% of applicable responding parents/carers stated that they were not – and this was most frequently (now) due to the advent of the 30 childcare offer, which they were accessing instead (53% of applicable respondents). The only additional *repeated* reason for not accessing the 15 hours funded entitlement was: I do not need to use the entitlement.

3.11 Usage of the 15 hours funded entitlement for 2 year olds

All responding parents/carers who had at least one child aged 2 years were invited to state whether they were accessing a funded entitlement for 2 year olds place in summer 2018. (Only) 6% of applicable responding parents/carers stated that they were – and three of these 100 parents lived in the Belmont ward. 94% of applicable responding parents/carers stated that they were not and the three most frequent reasons for this position were (in order of frequency):

1. (In the majority of cases) I am not eligible to receive the funded entitlement for 2 year olds
2. I do not know where to find out about this entitlement – stated by 7% of relevant parents/carers
3. I did not know it existed – also stated by 6% of relevant parents/carers

3.12 Experiences of informal childcare users

3.12.1 One-quarter of parents/carers were evidently accessing (at least one type of) informal childcare.

Table 33 - Incidence of usage of informal childcare by responding/applicable parents/carers

| Type of informal childcare | Percentage of applicable parents using |
|----------------------------|--|
| Grandparents | 96% |
| Other family members | 5% |
| Friends | 2% |
| Nanny/Au-pair | 2% |
| Other ¹² | 1% |

Note: a number of respondents/parents wished to provide multiple options.

Table 33 indicates that the most frequent type of informal childcare being used by responding applicable parents/carers in summer 2018 was – by a significant margin – grandparents.

3.12.2 Additionally, it was observed that 13% of the responding parents/carers stated that they *were not* – in summer 2018 – accessing/using any formal or informal childcare and that childcare (therefore) was only provided by themselves and/or a partner, where applicable. None of the applicable respondents were of course accessing either: (a) funded entitlement for 2 year olds (b) 15 hours funded entitlement for 3 and 4 year olds (b) 30 hours childcare offer – and the three most frequently stated reasons as to why – in summer 2018 – these parents/carers were not accessing any formal (or informal) childcare were – in order of frequency:

1. I find formal childcare too expensive – 39% of applicable parents
2. I do not need formal childcare – 37% of applicable parents
3. I do not want to use formal childcare – 27% of applicable parents

3.12.3 These 83 parents/carers of 0 – 5 year olds who were accessing at least one type of informal childcare in summer 2018 were invited to state the number of hours per week they used such childcare for in the term-time period and during (school) holidays...

For term-time(s), the average number of weekly hours stated was 11.5 and The most frequent number of hours stated was 5.

The following three wards – located in the Maidenhead and suburbs/vicinity – accounted for applicable parents stating the highest average time-term hours:

1. (By a significant margin) Maidenhead Riverside
2. Boyn Hill
3. Hurley and Walthams

¹² One parent stated “babysitter”.

For holiday time(s), the average number of weekly hours stated was 12.5. The most frequent number of hours stated – by a significant margin – was 20. The following three wards accounted for applicable parents stating the highest average holiday time:

1. Maidenhead Riverside
2. Boyn Hill
3. Belmont

- 3.12.3 Parents/carers of 0 – 5 year olds who stated that they were only accessing informal childcare were invited to state whether they had ever experienced any barriers to accessing childcare. There was a relatively low incidence of a response affirming that they had. However, where/when they had, this was most frequently: I could not/cannot afford the childcare that I require (stated by 20% of applicable parents)...
- 3.12.4 Similarly... parents/carers who were (a) only using informal childcare or (b) not using any formal or informal childcare were invited to state why they were not using any formal – registered – childcare. The most frequent response was: I find formal childcare too expensive (40% of such respondents) followed in frequency by: I prefer my child(ren) to be looked after by family and/or friends.
- 3.12.5 Finally, parents/carers who stated that they were (a) only accessing informal childcare or that (b) they were not accessing any formal childcare or informal childcare were also invited to state what they would look for, if they were to consider accessing/using such provision. Table 34 presents the frequency with which they provided specific responses.

Table 34 - Features which non-users of formal childcare evidently would look for if/when they considered accessing such provision

| Feature | Percentage of Parents |
|--|-----------------------|
| Good quality childcare | 68% |
| Somewhere I can use one of the funded entitlements | 37.5% |
| Affordable childcare | 32% |
| For it to be close to my home | 30% |
| For there to be play opportunities | 20% |
| Social opportunities for my child(ren) | 14% |
| Not applicable – as I won't | 12.5% |
| Flexible Hours/Ad hoc availability | 7% |
| Choice of different childcare types | 7% |
| For it to be close to my work | 7% |
| For it to be close my children's school | 7% |
| Other | 3% |
| Transport to be straightforward | 2% |
| Provision for additional needs/disabilities | 2% |
| To have it funded through Universal Credit or Tax-Free Childcare | 0 |

Table 34 indicates that the most frequent feature which non-users of formal early years childcare would welcome if they were to consider accessing such provision was (understandably): good quality childcare, followed in frequency by: somewhere I can use one of the funded entitlements (repeatedly stated by respondents who were resident in the Belmont ward and/or the Maidenhead Riverside ward).

3.13 Non usage of funded entitlements and the 30 hours childcare offer

Responding parents/carers of 2 – 5 year olds who were (a) only using informal childcare or (b) not using any formal or informal childcare were invited to clarify which of the three funded early years/childcare programmes they had heard of... and why they were not – or had not – been accessing any funded childcare places/support...

- 38% of such respondents stated that they had heard of the funded entitlement for 2 year olds
- 71% of such respondents stated that they had heard of the 15 hours funded entitlement for 3 and 4 year olds
- 69% of such respondents stated that they had heard of the 30 hours childcare offer

20% stated that they had not heard of any of the three types of funded early years/childcare.

In terms of those who *had* heard about the 30 hours childcare offer but were not accessing it, the most frequent reason for this was: I am not eligible (due to the level of my household salaries).

In terms of those who had heard about the 15 hours funded entitlement for 3 and 4 year olds but were not accessing it, the most frequent reason for this was: my child(ren) are aged 2 years and/or 5 years.

In terms of those who had heard about the funded entitlement for 2 year olds but were not accessing it, the most frequent reason for this was: I am not eligible for the entitlement (due to my circumstances being outside of the 'disadvantaged-focused criteria).

- 3.13.1 Responding parents/carers of 2 – 4 year olds who were (a) only using informal childcare or (b) not using any formal or informal childcare were invited to state whether they believed they would access the 30 hour childcare offer in the future for any of their applicable children. 37.5% of such respondents stated: Yes. 25% of such respondents stated: No. 37.5% of such respondents stated: Don't know.
(A ward which accounted for a relatively high frequency of applicable (current) non-users of formal or informal childcare stating that they *would* be interested in accessing the 30 hours childcare offer in the future was the Belmont ward within the Maidenhead vicinity).

The cohort of respondents who stated that they *would* be interested in accessing the 30 hours childcare offer in the future were invited to indicate a

potential preferred type of childcare provider that they might seek to access, again, in the (near) future.

Table 35 - Incidence of parents/carers who had a 2, 3 or 4 year old who were not accessing the 30 hours childcare offer stating a potential preferred venue (type) that they might seek to access in the (near) future

| Type of childcare provider | Percentage of applicable parents/carers |
|--|---|
| PVI sector day nursery – full or part-time | 100% |
| Pre-school or playgroup i.e. sessional childcare | 14% |
| Maintained school nursery class | 10% |
| Nursery school/class in an independent school | 14% |
| Registered childminder | 5% |

The applicable parents/carers of 2 – 4 year olds most frequently envisaged that the type of early years childcare provider which they may prefer to access a 30 hours childcare place at some point in the (near) future was – by a significant margin – one of the Royal Borough’s PVI sector day nursery – full or part-time.

Finally, the same cohort of parents/carers were invited to state how many hours of the (maximum) 30 they *envisaged* they would potentially take-up – should they access the childcare offer in the (near) future.

The most frequently stated number was 30 hours.

The average number of hours stated was 27 hours – and 45 minutes (which matched the average number stated by users of the 30 hours childcare place – see page 8).

30 hours childcare-themed – Gaps Analysis

The following narrative presents some potential priorities which sufficiency planners within the Royal Borough of Windsor and Maidenhead could consider as the second year of full roll out of the 30 hours childcare offer commences. A number of them are geographical themed potential *forthcoming* priorities, which have been informed by the outcomes of the consultation presented within this 30 hours childcare focused 2018 Childcare Sufficiency Assessment.

Potential Emerging Gap 1: The population of 3 and 4 year olds continues to be at its highest in the following three neighbouring wards within the Maidenhead locality: Belmont ward; Oldfield ward; Boyn Hill ward.

A number of significantly sized new housing developments are also set to take place within these three wards, including the high profile Maidenhead Golf Course development and the Saint-Cloud Way development, which is adjacent to Kidwells Park. At their conclusion and occupation these developments will – in all likelihood – result in (more) pressure for access to funded early years childcare places – including localised 30 hours childcare offer places.

It was observed that as an outcome of the 2018 Childcare Sufficiency Assessment's Childcare Providers Survey, a number of early years childcare providers (located in the Oldfield and Boyn Hill wards) stated that they were not – in summer 2018 – able to meet the demand that they were experiencing for 30 hours childcare.

Finally, it was observed that a ward which accounted for a relatively high frequency (in summer 2018) of non-users of formal or informal early years childcare (who had a 2, 3 and/or 4 year old) stating that they *would* be interested in accessing the 30 hours childcare offer in the future was the Belmont ward (see 10. below, page 74).

Potential Action: Those responsible for childcare sufficiency planning within the Royal Borough need to retain an awareness that pressure for future funded early years childcare will – with a strong probability – be focused on the Maidenhead vicinity. (Structured) business modeling support, offered to/accessible to the Maidenhead vicinity's early years childcare sector could retain a key objective of encouraging/enabling more 30 hours childcare places, including through such support offered to the Maidenhead locality's childminders.

Those responsible for childcare sufficiency planning within the Royal Borough could consider working with those colleagues behind the planned establishment of the new primary school, which will complement the Maidenhead Golf Course development, and propose the consideration/initiation of a nursery class.

Potential Emerging Gap 2: The Windsor locality of the Royal Borough accounts for a relatively high incidence of working families. The locality also accounted for a number of early years childcare providers (located in the Old Windsor and Castle Without wards) who, as an outcome of the 2018 Childcare Sufficiency Assessment stated that they were not – in summer 2018 – able to meet the demand that they were experiencing for 30 hours childcare.

Additionally, 0 registered childminders were providing 30 hours childcare offer places, or envisaged that they would be introducing additional 30 hours childcare places for the period 2018 – 2019, in the following three (consecutively bordering) Windsor locality wards: Datchet; Eton Castle and Eton Wick.

Potential Action: Those responsible for childcare sufficiency planning within the Royal Borough need to retain an awareness that during 2017 – 2018 a discernible shortfall in supply was evident within the Northern Windsor locality.

Once again, any forthcoming (structured) business modeling support and/or efforts to catalyse or support (physical) expansion could also retain a focus on the Windsor locality again, including through such support offered to that locality's childminders.

Potential Emerging Gap 3: In terms of the Ascot locality, a mixed picture was observed as an outcome of the 2018 Childcare Sufficiency Assessment.

The locality evidently accounted for the highest number of vacant 30 hours childcare offer places that had been established by summer 2018 – reported by both responding/applicable early years childcare providers *and* registered childminders. However, three early years childcare providers located in the Ascot and Cheapside ward stated that they were not – in summer 2018 – able to meet the demand that they were experiencing for 30 hours childcare. The Ascot locality will also account for three relatively sizeable housing developments in the forthcoming years:

1. Sunningdale Park development;
2. Ascot Center site development;
3. housing development at the Heatherward Hospital green belt land.

Finally, the Ascot and Cheapside ward and the Sunninghill and South Ascot ward accounted for the highest average hours of usage of formal childcare stated by parents of 0 – 5 year olds who participated in the 2018 Childcare Sufficiency Assessment.

Potential Action: Those responsible for childcare sufficiency planning within the Royal Borough need to retain an awareness that the Ascot may also account for an increasing demand for 30 hours childcare places – especially as its planned new housing developments begin to be completed and occupied over the forthcoming years.

Potential Emerging Gap 4: The most frequent feature/element of the 30 hours childcare offer that early years childcare providers and registered childminders considered that *they* would (still) benefit from information about was the eligibility criteria. The parents of 0 – 5 year olds who participated in the 2018 Childcare Sufficiency Assessment also reinforced this feedback when stating that *understanding their eligibility* was the feature of the offer that they were most frequently (still) unsure about.

Indeed 46% of responding parents of 0 – 5 year olds *who had* accessed the 30 hours childcare offer during its first year of national roll-out stated that they found securing a 30 hours childcare place either: not as easy as I would have liked, or: complicated and/or stressful. Three relevant and recurrent quotes were (words to the effect): 1. *“The online eligibility portal... made it challenging”*; 2. *“The need to re-confirm eligibility... made it challenging”*; 3. *“I experienced a delay receiving the eligibility code”*.

Potential Action: Evidence was produced via the consultation outcomes for the 2018 Childcare Sufficiency Assessment that early years childcare providers, registered childminders and parents 2 – 4 year olds had become more collectively attuned to the processes around eligibility and re-confirmation of eligibility as the period 2017 – 2018 had progressed. However, those responsible for childcare sufficiency planning within the Royal Borough need to (continue to) anecdotally and methodically monitor the extent to which eligible families that are resident within the locality may be deterred from accessing a 30 hours childcare due to them being uncertain about the eligibility criteria and processes. Sufficiency planners should also consider the 2018 Childcare Sufficiency Assessment reported that 20% of parents/carers stated that they had not heard of existence of any of the *three* types of funded early years/childcare.

Potential Emerging Gap 5: All responding early years childcare providers and registered childminders who were evidently not (yet) offering 30 hour childcare offer places in summer 2018 were asked whether they envisaged that they would begin to provide 30 hours childcare places at some point (i.e. autumn, spring or summer) in 2018 – 2019. (Only) 5% of applicable responding early years childcare providers/settings stated: Yes and (only) 5% of applicable responding early years childcare providers/settings stated: Maybe.

More encouragingly, 26% of applicable responding registered childminders stated: Maybe – and they were most frequently located in the Maidenhead vicinity of the Royal Borough.

Potential Action: Those responsible for childcare sufficiency planning within the Royal Borough could consider initiating further business development support which promotes, *through a 1 : 1 approach*, the (business and financial) advantages of providing 30 hours childcare offer places.

Potential Emerging Gap 6: The type of Royal Borough-based early years childcare provider that was being accessed in 2017 – 2018 in order to take-up a 30 hours childcare offer place was – by a significant margin – a PVI sector day nursery or a maintained sector nursery class.

(It was observed that only 4% of applicable parents/carers of 3 and/or 4 year olds had accessed a 30 hours childcare offer place at a registered childminder during 2017 - 2018). Additionally, responding parents/carers of 2 – 4 year olds who were (a) only using informal childcare or (b) not using any formal or informal childcare in summer 2018 were invited to state what type of childcare setting they would *prefer* to access a 30 hours childcare offer place at, if they decided to do so at some point in the near future... The most frequent type of provision stated was, once again – by a significant margin – one of the Royal Borough’s PVI sector day nurseries or a maintained sector nursery class.

Potential Action: As awareness of the 30 hours childcare offer increases – including in to 2018 – 2019 – those responsible for sufficiency planning within the Royal Borough should consider the extent to which the ability to meet demand within the local PVI nursery sector and within the locality’s seventeen maintained school nursery classes can keep pace. There were emerging signs – evidenced by the 2018 Childcare Sufficiency Assessment – that a number of early years childcare providers situated in each of the three main localities of the Royal Borough, i.e. Maidenhead, Windsor and Ascot, were (already) experiencing a demand for 30 hours childcare which they were finding *challenging* to meet.

Potential Emerging Gap 7: The 2016 Childcare Sufficiency Assessment reported that 28% of registered childminders did not expect to be operating by autumn 2019. Two wards where this response was notably repeated were (a) Cox Green (six childminders) and (b) Old Windsor (four childminders).

In 2018, (a lower percentage) 22% of registered childminders have reported that they do not expect to be operating by (for this CSA) autumn 2020. The Cox Green ward once again accounted for a repeated consideration that a *responding* childminder would not be operating by autumn 2020 – as did, in 2018, the Ascot and Cheapside ward.

Potential Action: Those responsible for childcare sufficiency planning should continue to (strategically) prioritise their ability to *help to* (a) retain and (b) develop future places – including 30 hours childcare offer places – with registered childminders, with an understanding that a number of such professionals, who responded to the 2018 Childcare Sufficiency Assessment, express concern about whether the timing of 30 hours childcare offer payments would deter them from becoming involved in the delivery of such provision.

Potential Emerging Gap 8: The 2016 Childcare Sufficiency Assessment reported a limited incidence of registered childminders intending to deliver 30 hours childcare offer places within the north eastern locality wards of Datchet and Horton and Castle.

The 2018 Childcare Sufficiency Assessment, in turn, reported that 0 responding childminders were in fact providing such an option and delivering 30 hours childcare offer places in both wards and that a relatively low percentage of early years childcare providers were providing 30 hours childcare offer places in the Datchet ward.

Potential Action: Those responsible for childcare sufficiency planning should continue to (strategically) prioritise their ability to *help to* develop future places – including 30 hours childcare offer places – with registered childminders and early years childcare providers in the north eastern locality of the Royal Borough.

Potential Emerging Gap 9: The Cox Green ward and the Furze Platt ward both have a relatively high number of resident 3 and 4 year olds. However, both wards account for a relatively low proportion of their early years childcare providers/settings stating – in summer 2018 – that they were delivering the 30 hours childcare offer places.

Potential Action: Those responsible for childcare sufficiency planning should (continue to) methodically and anecdotally monitor the take-up and prioritise their ability to *help to* develop future places – including 30 hours childcare offer places – with registered childminders and early years childcare providers in the Maidenhead suburbs, including as...

Potential Emerging Gap 10: ...There were evidently – as reported in the 2018 CSA by *responding* applicable providers – only sixteen 3 and 4 year olds on roll and occupying a 30 hours childcare offer place across the Belmont ward's early years childcare providers, in summer 2018. This was a much lower roll figure than was reported for the Oldfield ward and the Boyn Hill ward.

Potential Action: Those responsible for childcare sufficiency planning should (continue to) methodically and anecdotally monitor the take-up and prioritise their ability to *help to* develop future places – including 30 hours childcare offer places – with registered childminders and early years childcare providers, with an additional particular focus on the multi-bordered (with other Maidenhead locality wards) Belmont ward.