

# Newcastle upon Tyne Childcare Sufficiency Report 2019



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## Key findings

- Half of all graded full day care settings in Newcastle are judged by Ofsted as outstanding.
- 94% of all childcare provision is graded by Ofsted as good or better.
- The percentage of children accessing funding entitlements in outstanding setting is higher in Newcastle than it is nationally.
- The number of registered childminders has increased for the first time in ten years and childminder continue to offer the most flexible care.
- There has been a reduction in the number of setting-based providers, this is most noticeable in the pre-school playgroup sector.
- More children are accessing their extended entitlement in schools, and more schools are running their own out of school clubs.
- There is a correlation between distance travelled and deprivation, with families who live in the most deprived areas likely to access provision within a mile of their home.
- The average price of childcare in Newcastle has risen by only 1p per hour, however there are a wide range prices depending on area, sector and subsidisation.
- Private and voluntary run out of school clubs are predominantly run by chains and are in more affluent areas. Out of school clubs in deprived areas tend to be school run.

## Introduction

The Childcare Act 2006 (section 6)<sup>1</sup> places a duty on Local Authorities to secure, so far as reasonably practicable, sufficient childcare to meet the requirements of parents in their area who require childcare in order to enable them:

- to take up or remain in work, or
- to undertake education or training which could reasonably be expected to assist them to obtain work.

Alongside this, section 11 of the Childcare Act 2006 states that Local Authorities have a duty to assess whether the childcare provision in their area is sufficient to meet demand and to keep those assessments under review which also includes reporting on holiday care, quality of provision and affordability.

The assessment looks at the childcare market in Newcastle in 2018/2019 taking into account demand, both at present and in the future and comparing this with supply, paying attention to early years funded places and the successful embedding of the extended entitlement for eligible three-and-four-year-olds.

## Methodology

This report is based on information and data gathered by Newcastle City Council and a range of external organisations including Ofsted, Office of National Statistics (ONS), Department for Education (DfE). Its primary aim is to assess whether

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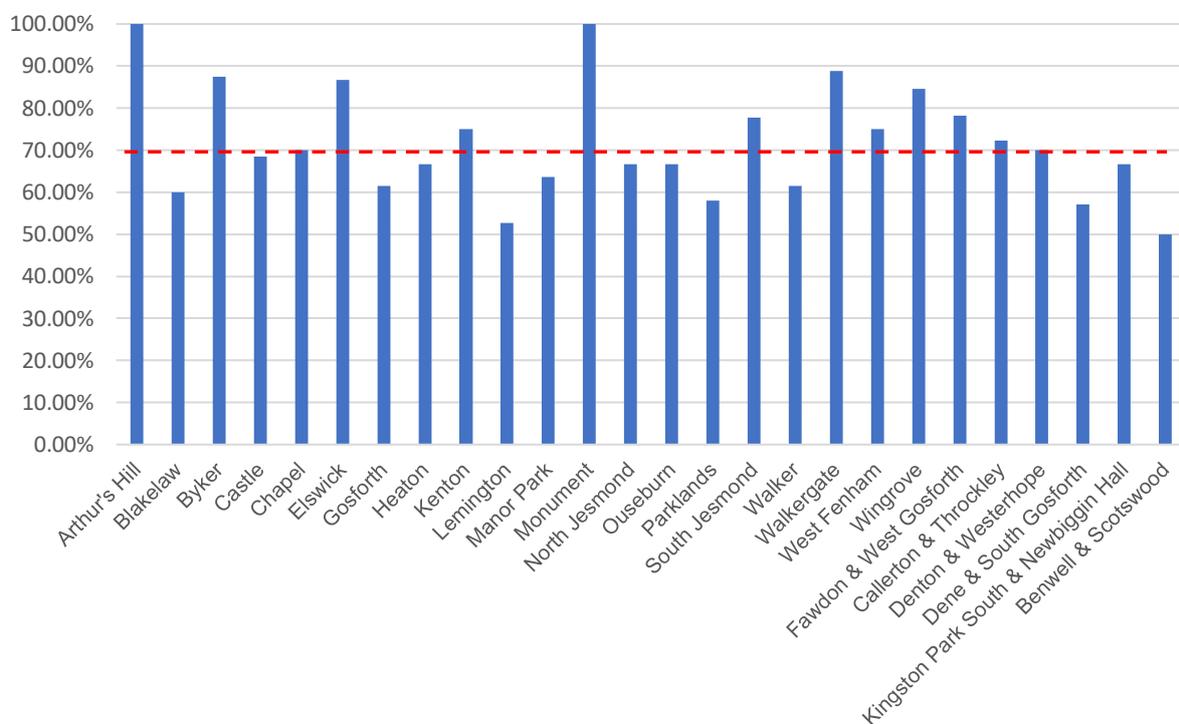
<sup>1</sup> <http://www.legislation.gov.uk/ukpga/2006/21/contents>

Newcastle, as a city, has sufficient childcare to meet current demand. It will to also consider future demands and look at the effects of changes in both national policy and the market.

To enhance the data already available, audit information was collected from childcare providers in the city. Questions were designed to capture information about flexibility and costs that are not available through published data. But also, to look at specific areas of interest:

- any increase or decrease in the use of early education and childcare within schools and what, if any, the impact of this is on all provision.
- the influence if any of the extended entitlement on provision for two-year-olds.
- changes if any in the use of out of school clubs

**Figure 1: Percentage providers who completed the audit**



Overall provider response rate was 70% with mixed completion rates by provider type for example 35% of out of school clubs completing compared with 100% of independent schools. Completion was highest among providers who receive early years funding, these are the providers who have the contact with local authority staff. For out of school club providers engagement is particularly difficult because they then tend to work predominantly outside of office hours, and like some other provider all staff childcare professionals with not administrative support or paid time.

## Demand

### City demographics

Newcastle is a mainly urban city with some rural fringes, the city is split into 26 wards. There is a total population of around 300,200<sup>2</sup> of which, 201,500 (68.1%) are age 16-64. When compared with the national picture (62.9%) Newcastle has a higher percentage of 'working age' (age 16-64) residents. Of the 201,500 residents age 16-64, 145,200 (71%) are economically active, almost 8 percentage points lower than the national figure (78.7%). In Newcastle 21.1% of households are workless compared with 14.3% nationally.

While migration to the North East has been lower than other parts of the UK, within the North East, Newcastle is by far the most popular destination for migrants<sup>3</sup>. In terms of ethnic diversity, ONS 2001 Census data<sup>4</sup> tells us that younger age groups tend to be more diverse with larger proportions of people being from a black and minority ethnic (BAME) background. Newcastle school census data tells us that the proportion of BAME children is much higher than for adults and continues to rise. BAME children accounted for 24% of the school population in 2011, this rose to 32% in 2019.

Newcastle has a higher than national percentage of residents (40.5%) with qualifications at or above NVQ4<sup>5</sup> (39.3% Nationally), and 27.5% of those employed are employed in professional occupations compared with 20.9% nationally.

When looking at earnings, employed residents in Newcastle earn on average £35 per week less than the national average. However, compared with the rest of the North East Newcastle residents earn on average £24.7 more per week.

In Newcastle men earn on average £84, or 14.9% per week more than women. Nationally the figures are even higher, with men earning £102.2 or 16.7% more. Women are also more likely than men to work part time. 44% of the people who work in Newcastle also live here, the other 56% commuting into Newcastle for work from other authorities<sup>5</sup>.

Newcastle City Council was an early roll out city for the introduction of Universal Credit (UC). In theory, with more people 'in work' this should result in a higher demand on childcare. There are, however, some reported barriers, for example the following was reported in British Medical Journal (BMJ); "Before making a claim, people need an email address, bank account, mobile phone number and National Insurance number, photo identification, proof of rent, tenancy agreement, landlord details, payslips, income, child benefit, childcare provider details. New UC claimants wait a minimum of 35 days before receiving their first payment (four weeks to assess the last month's earnings plus a further week to process the payment)."<sup>6</sup> This means,

<sup>2</sup> NOMIS official labour market statistics: <https://www.nomisweb.co.uk/> (06 August 2019)

<sup>3</sup> Newcastle City Council: <https://www.newcastle.gov.uk/our-city/statistics-and-intelligence>

<sup>4</sup> ONS Census 2001: <https://www.ons.gov.uk/census/2011census/2011censusdata/2001censusdata>

<sup>5</sup> Know Newcastle: <http://www.knownewcastle.org.uk/GroupPage.aspx?GroupID=62>

<sup>6</sup> The impact of the roll out of Universal Credit in two North East England localities: a qualitative study, 2018, (BMJ) <https://bmjopen.bmj.com/content/9/7/e029611>

parents may need to have childcare in place up to 6 weeks before their first UC claim is paid. In addition to this “Underpayments were common with missing elements for housing costs, child support, childcare, carers and limited capability for work.” This again means that parents will be unable to pay childcare bills during times of under payment. As improvements to the system are made, and confidence increases more UC parents may require formal childcare. In the meantime, parents may need additional support in both accessing and paying for childcare, and providers may need support in managing new systems and supporting parents with managing payments.

**Table 1: Newcastle population**

Age	Number of children
Birth to five	16,792
Primary school (age 5 - 11)	24,240
Secondary school (age 12 - 19)	20,320
<b>Total</b>	<b>61,352</b>

In total there are 16,792 children in Newcastle who are under five and many require early years childcare. Some children under five will be in full time education and fall into the school children category. This number will fluctuate across the year, with the most four-year-olds in full time education in Autumn, reducing the demand for early years funded places.

There are 24,240 children age 5-11 and 9,074 children age 12-14. These children may require childcare before and after school and during school holidays.

**Table 2: Children with disabilities**

Age	Number of children
Birth to five	729
Primary school (age 5 - 11)	3,658
Secondary school (age 12 - 19)	2,495
<b>Total</b>	<b>6,882</b>

There are 6,882 children in Newcastle with an identified disability or Special Educational Need (SEN data from School Census, Capita One and Care First). Of all

children age 5-16 an average of 0.14% have an identified disability, this is much lower in the early years band (age 0-4) and could be because these children are too young for a formal diagnosis.

January 2019 DfE census data<sup>7</sup> tells us that since 2018 the number and proportion of children with a statement or EHC plan has increased and the number and proportion of children with Special Educational Needs (SEN) support has also increased. Looking more closely at type of need, there have been increases in numbers of children with special needs, especially with autism spectrum disorders (ASD) and social, emotional and mental health difficulties (SEMH).

## Factors affecting choice

Decision making around childcare can be complex and varied. Some parents choose not to use childcare, while others use up to 50 hours per week. The Department for Education's Childcare and Early Years Survey of Parents in England, 2018<sup>8</sup> states that 62% of families in England with children age 0 to 14 used formal childcare but also, that almost a quarter (23%) of families use a combination of formal and informal childcare. This means that one childcare place could meet the needs of one or several families. Demand for childcare also varies depending on the age of a child, and what funding or support with costs is available. Data published by the DfE<sup>7</sup> tells us that in 2019, 94% of three-and-four-year-olds took up a childcare place in Newcastle. Ofsted registration data shows almost all (over 99%) of registered childcare places are offered by providers on the early years register.

We also know that 56%<sup>9</sup> of people who work in Newcastle live in neighbouring authorities. Some of these employees will be parents and may choose childcare in Newcastle rather than where they live. This means that the supply of childcare must meet the demands of parents from both inside and outside of Newcastle.

Using 2019 January Census data, we were able to see how many out of authority residents accessed a funded early years place in the city. The data indicated that around 300 or 7% of children travel from another local authority to access at least some of their three-and-four-year-old funded place in Newcastle. Around half (146) of these children attend full day care settings. The setting type that attracts the highest percentage of children from out of area is independent schools with 41% of three-or-four-year-olds traveling in from other authorities, compared with 3% in state funded schools.

Newcastle is a relatively small geographical area, with densely populated provision (0.5 Ofsted registered places per hectare, compared with Northumberland 0.01 per

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<sup>7</sup> Special Educational Needs (January 2019): <https://www.gov.uk/government/collections/statistics-special-educational-needs-sen>

<sup>8</sup> Childcare and Early Years Survey of Parents in England, 2018: [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/766498/Childcare\\_and\\_Early\\_Years\\_Survey\\_of\\_Parents\\_in\\_England\\_2018.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/766498/Childcare_and_Early_Years_Survey_of_Parents_in_England_2018.pdf)

<sup>9</sup> Know Newcastle <http://www.knownewcastle.org.uk/GroupPage.aspx?GroupID=62>

hectare)<sup>10, 11</sup>. In addition to out of area we also looked at average distance travelled, by three-and-four-year-olds.

**Table 3: Average distance (miles) to provider type**

Provider Type	Average Distance (miles)
Independent schools	3.86
Full day care	1.51
Pre-schools playgroups	0.95
Schools	0.68

We found that the shortest distance travelled was to state funded schools, average of 0.68 miles, and greatest distance travelled was to independent schools, an average 3.86 miles.

For two-year-olds the picture is less mixed and overall travel distances much lower. The average distance travelled regardless of provider type was 0.6 miles, compared with 1.1 miles for three-and-four-year-olds. As two-year-old funding is a targeted offer this could suggest a link between deprivation and distance travelled.

While Income Deprivation Affecting Children Index (IDACI, see glossary for further information) is not part of the two-year-old criteria, there is a clear link with 50% of all funded two-year-olds in living in Lower Super Output Areas (LSOA) in the most deprived 10% nationally, and a further 20% in 10-20% bands. Across all ages (two-three-and-four years) there is a strong correlation between average distance travelled and IDACI. The lower the IDACI deciles (or the higher the levels of deprivation) the shorter the travelling distance.

<sup>10</sup> 2011 Census: Population Estimates by five-year age bands, and Household Estimates, for Local Authorities in the United Kingdom accessed 07/11/2019

<sup>11</sup> Ofsted, childcare providers and inspections accessed 07/11/2019

## Supply

### Providers and places

There is a total of 340 registered childcare providers in Newcastle offering a total of 9,249 places, with additional out of school club capacity in schools. Almost all registered providers are on both the childcare register and the early years register, providing a combined early education and childcare.

**Table 4: Registered childcare**, with percentage increase / decrease compared with 2018 Childcare Sufficiency report<sup>10</sup>.

	Providers	Places	Average per Provider
Childminders	160 ▲ 5.96%	1,089 ▲ 5.73%	6.81
Full day care	36 ▼ 2.70%	2,655 ▲ 1.22%	73.75
Pre-school playgroups	46 ▼ 6.25%	1,355 ▼ 5.76%	29.46
Out of school clubs	26 ▼ 13.33%	1,041 ▼ 19.11%	40.04

The overall number of registered childminders has decreased year on year since 2008. This year, the ten-year downward trend has reversed. There has been an increase of nine childminders since last year's report. This is the combination of 14 new registrations balanced with five resignations, resulting in an increase of 59 places, significantly more than 18 last year<sup>12</sup>.

The number of full day care providers has fallen by one, however this has not led to a decrease in the number of places, in fact, there has been an increase of 32 places. This is a continuation of the trend reported last year, where providers are choosing to expand rather than establishing brand new provision.

Both pre-school playgroup numbers and out of school club numbers have reduced compared to last year. For out of school clubs this is predominantly, accounting for three of the four closures, due to a change from private to school run provision on school sites. This means that in terms of places the actual reduction is one provider and around 20 places. We are confident that any gap in demand created by this reduction can be met by school and other existing providers.

<sup>12</sup> Newcastle upon Tyne Childcare Sufficiency Report 2018:  
<https://www.newcastle.gov.uk/sites/default/files/early%20years%20and%20childcare/Childcare%20Sufficiency%20Report%20%20final.pdf>

In the pre-school playgroup sector the reduction is complex and potentially more of a concern. Since the collection of this data a further six pre-school playgroups have closed, two in Castle, two in Callerton and Throckley, and one in Kingston Park South and Newbiggin Hall, a loss of 150 childcare places. This is on top of the four pre-school playgroups and 82 places reported in the table above. Of these four, two have now re-opened, both by established chains in the city. The proportion of pre-school playgroups that are now run by chains has increased from 11% in 2016 to 27% by the end of 2019. This could suggest that where settings are small, a reduction of only a few children can affect viability. In this scenario, manging budgets at a group rather than setting level could provide sustainability.

As pre-school playgroup provider numbers have reduced, average places per provider have increased in schools (see below) and in full day care (see above). This indicates that as larger settings expand smaller settings are closing. From the perspective of overall sufficiency, the number of places remains high enough to meet our duty. However, a reduction in the number of setting-based providers is a concern because this will reduce the density of provision, meaning parents may have to travel further to access setting-based care. This issue is of concern where parents of children (two, -three-and-four-year-olds) wish to only use their 15 hours funded entitlement. Where a child is attending a provider for a shorter time, typically three hours per day, the distance to and from that provision may impact on choice more than if the child was attending a full day.

**Table 5: School based provision and places**

	Providers	Places	Average per Provider
Nursery classes and schools	62	2,951	48.38
Nursesey classes in independent schools	5	142	28.4
Special school nurseries	2	16	8
School run out of school clubs	30 (+25 Free)	–	–

*The specific number of places for out of school clubs in school has not been included because it is recognised that this data can be unreliable.*

Even though the numbers of school nursery classes has increased by only one, the overall childcare offer available in school is more flexible with more schools offering full days in nursery 9am-3pm, and many offering wrap around covering 8am-6pm. Greater flexibility has led to the shift from the Private, Voluntary and Independent

(PVI) sector to school in the take up of extended entitlement hours from January 2018<sup>13</sup> to January 2019<sup>14</sup>.

In Newcastle 80.5% of schools delivering the Early Years Foundation Stage (EYFS) have nursery classes<sup>15</sup>. Within this there are four nursery schools, and one primary school with a large nursery that was previously a nursery school. There are nine first schools, all in the Gosforth School Trust, six (66.7%) of which have nursery classes. There are also 63 primary schools, with 51 (81%) having a nursery class.

All primary and first schools have some form of out of school care arrangements. 74% run their own breakfast clubs. 30 (41%) of these are fee paying, although some are subsidised, and fees can be as little as £1 per session. 26 (36%) schools run free breakfast clubs, many of which are sponsored by the Greggs Foundation or others. The remaining schools have PVI provision on site or a PVI provider collects from the school. Fewer (25, 34%) schools run their own after school clubs. However, all primary and first schools have extracurricular activities such as sports clubs directly after school, for an hour or more on at least some day. These activities are not formal childcare but many parents use them as part of a patchwork of care. Charges vary from school to school with some free activities.

For the second year we have also collected information about places in schools. This information has been reported separately as Ofsted do not define a specific number of places in the same way they do for registered childcare, meaning we have collated the data locally.

Schools were asked to report the overall number of children they could accommodate at any one time. For nursery and pre-school playgroup provision this is relatively straightforward. School run out of school clubs have much greater flexibility due to a greater availability of space and much more flexible staffing ratios. This means that they don't really have an upper limit, they just flex to absorb parental requirements, however it does make it difficult capture in the numbers.

As mentioned earlier out of school clubs (both in schools and in PVI sector) remain the most difficult to engage. While we are confident with regards to the overall sufficiency, we don't feel we have a full and clear understanding of changes in this sector. The Coram Family and Childcare survey 2019<sup>16</sup> suggests use of formal childcare overall has reduced and this has been attributed to a fall in the use of after school clubs. Use reduced the most among lone parent families and families living in the most deprived areas. In Newcastle only 11% of PVI out of school clubs are in the 10% most deprived super output area (SOA), compared with 55% run by schools. 70% of schools that offer free breakfast clubs are in the 10% most deprived SOA.

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<sup>13</sup> Newcastle upon Tyne Childcare Sufficiency Report 2018:

<https://www.newcastle.gov.uk/sites/default/files/early%20years%20and%20childcare/Childcare%20Sufficiency%20Report%20%20final.pdf>

<sup>14</sup> Education provision: children under 5 years of age, January 2019:

<https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2019>

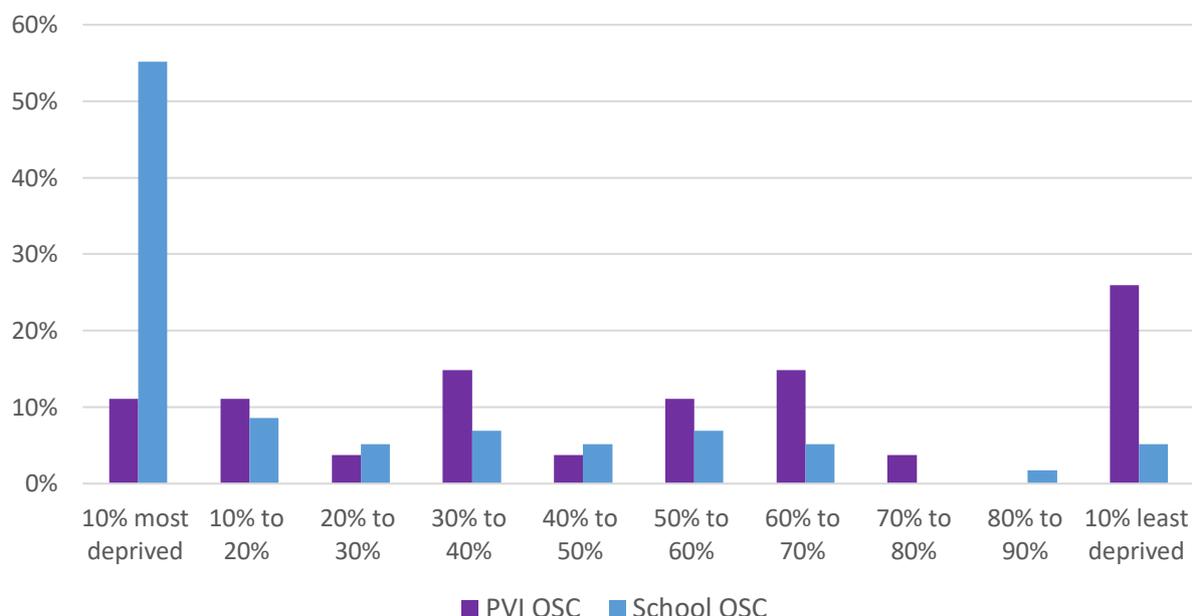
<sup>15</sup> Get information about schools: [https://get-information-](https://get-information-schools.service.gov.uk/?SelectedTab=Establishments&SearchType=ByLocalAuthority)

[schools.service.gov.uk/?SelectedTab=Establishments&SearchType=ByLocalAuthority](https://get-information-schools.service.gov.uk/?SelectedTab=Establishments&SearchType=ByLocalAuthority)

<sup>16</sup> Coram Family and Childcare, Childcare Survey 2019: <https://www.familyandchildcaretrust.org/childcare-survey-2019>

Conversely, 25% PVI out of school clubs are in the 10% least deprived SOA compared with 5% of school provision (see figure below). This shows a tendency for PVI out of school clubs to be in more affluent areas, and school run out of school clubs to be in more deprived areas.

**Figure 1: Comparison of school based and PVI out of school clubs by IDACI bands**



### Ages and Opening times

Different provision types cater for different age ranges (see glossary for further details). Of the 259 providers who responded to questions around age cared for, 115 (45%) said they cared for children under two years old. Of these 78 were Childminders and 37 were full day care.

For children over the age of two years the number of available providers increases to 171 (66%), including 77 childminders, 16 schools, one school run out of school club, 38 Pre-School Playgroups and 37 full day care providers. For children aged three or four years the number increases again to over 90% and includes more providers from each provider type. Some out of school clubs don't care for children below statutory schools age. Providers' age ranges can limit or inform choice for parents with more than one child.

Childminders continue to offer the most flexible childcare service providing the earliest starts and latest finishing times for all ages of children. 28 (17.5%) Childminders reported offering evening care, 13 (8.1%) offer Saturday care and 7 (4.4%) offer Sunday care. In addition, anecdotal evidence tells us that childminders who don't currently offer out of hours care would consider it if they were asked, especially from a family they are working with already.

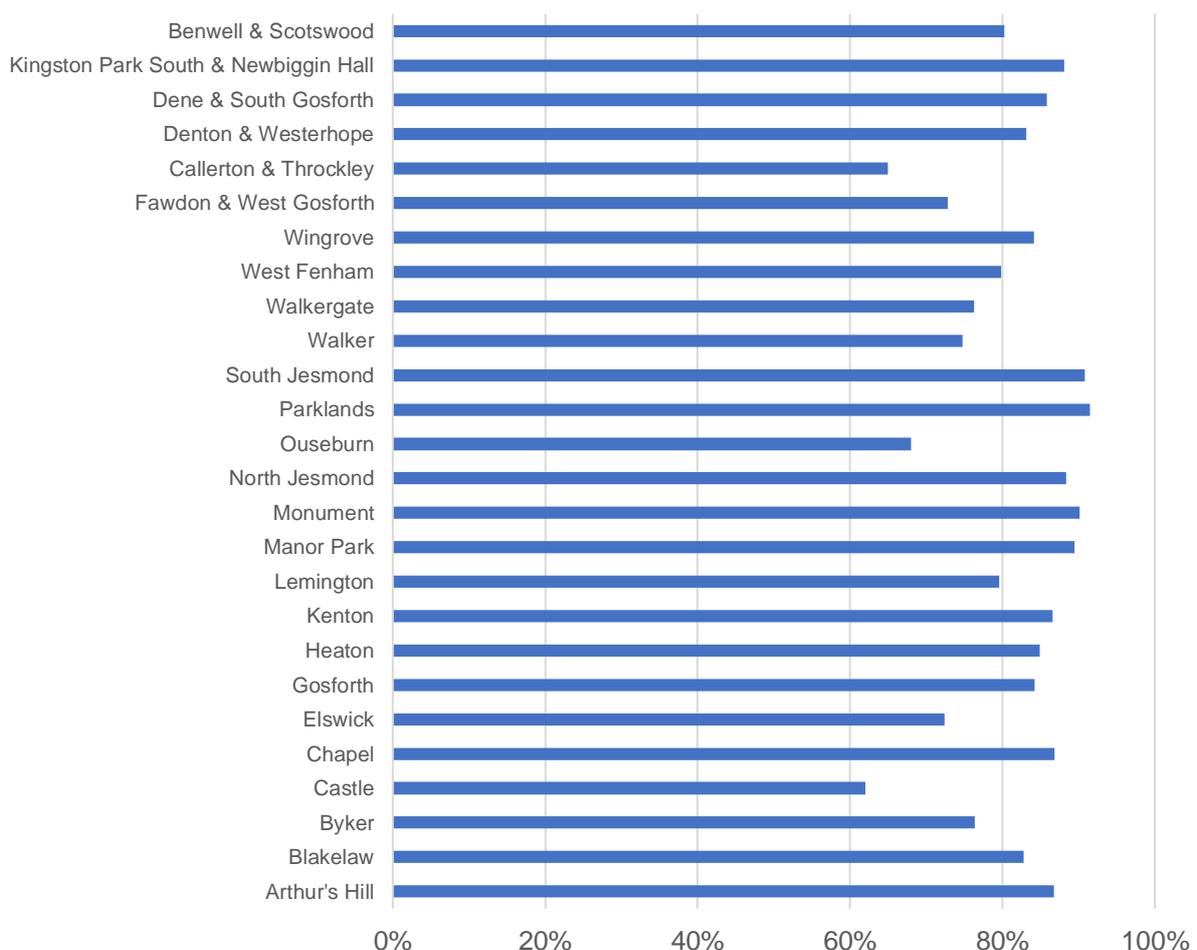
Full day care settings are generally open from 8am to 6pm, although some open slightly earlier and some close later. These settings tend to offer full or half days and are open all year round. Although they are open for the longest hours, and most weeks of the year, the flexibility in term of start and finish times may be limited, with parents being required to pay for full or half days.

Pre-school playgroups often offer three hour sessions morning, afternoon or both and some now offer longer days, better matching the school day. Some work with other providers to offer full day care. Out of school clubs offer care before and after the school day, and some offer care during the day in school holidays.

## Occupancy

We asked providers about their vacancies at the time of audit (summer 2019). From this information we were able to calculate average weekly occupancy. The overall average weekly occupancy report was 79.7%, with some variation by ward. This indicates a balance between capacity and viability, but crucially for this report shows availability of places, across all areas to help meet the needs of parents.

**Figure 2: Weekly Average Occupancy by Ward**



*NB: Questions in relation to occupancy were asked differently in 2019 compared to 2018. This means that this data is not comparable.*

Occupancy rates were highest mid-week, 80% on Tuesdays, 81% Wednesdays and Thursdays, and lowest on Mondays and Friday (78%). Fluctuating occupancy across the week indicates that children do not all attend settings every day. This may be because so many parents are working part time, or it may be because parents are choosing alternative care (formal or informal) on some days. Either way, this evidences the complexity of the childcare market.

## Pricing and affordability

The Survey of Childcare and Early Years Providers: LA Fees Experimental Statistics, England, 2018<sup>17</sup> stated that the mean hourly cost of childcare within each local authority ranges from £3.50 to £8.50, with Newcastle at £4.00, based on a sample of 40 providers.

The Coram Family and Childcare Survey 2019<sup>18</sup> states that national average cost of part time childcare is £5.02, but as with above there is substantial regional variation, the North East at £4.23 for setting-based provision.

The Childcare Survey also points out that the average cost of a part time childcare place for a child under three is almost twice as much as the average household spends on food each week. Despite this, over half (52%) of parents who paid for childcare said it was easy or very easy to meet their childcare costs. On the other hand, 19% parents found it difficult or very difficult to meet their childcare costs, nationally. This shows how significant childcare costs are for families and is further evidenced by the example below: The estimated take home pay for a person over 25, on minimum wage, who doesn't pay into a pension or have a student loan working 37 hours a week is £274.60<sup>19</sup> (excluding any other income or benefits). The average cost of full day care for a child under two is, £265.51, however the maximum childcare element on Universal credit is £149.16<sup>20</sup> per week. These figures show that particularly for children under two, where no funded entitlement is available the cost of childcare, for just one child can be close to a parent's full-time wage.

This does not mean that the childcare sector is overcharging parents. The cost of delivery is high and rising. The National Day Nurseries Association (NDNA) have said that research published by DfE in 2018 has stated that when training and investments was considered, the cost of delivering childcare was 17% higher in 2018 compared with the 2015. Where childcare costs are lower in other parts of the world this is not because delivery is cheaper, it is in the main because subsidy is higher<sup>21</sup>.

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<sup>17</sup> The survey of Childcare and Early Years Providers: LA Fees Experimental Statistics:

<https://www.gov.uk/government/statistics/childcare-and-early-years-providers-survey-2018>

<sup>18</sup> Childcare Survey, 2019:

[https://www.familyandchildcaretrust.org/sites/default/files/Resource%20Library/Childcare%20Survey%202019\\_Coram%20Family%20and%20Childcare.pdf](https://www.familyandchildcaretrust.org/sites/default/files/Resource%20Library/Childcare%20Survey%202019_Coram%20Family%20and%20Childcare.pdf)

<sup>19</sup> <https://www.tax.service.gov.uk/estimate-pay-take-home-pay/your-results>

<sup>20</sup> <https://www.gov.uk/help-with-childcare-costs/universal-credit>

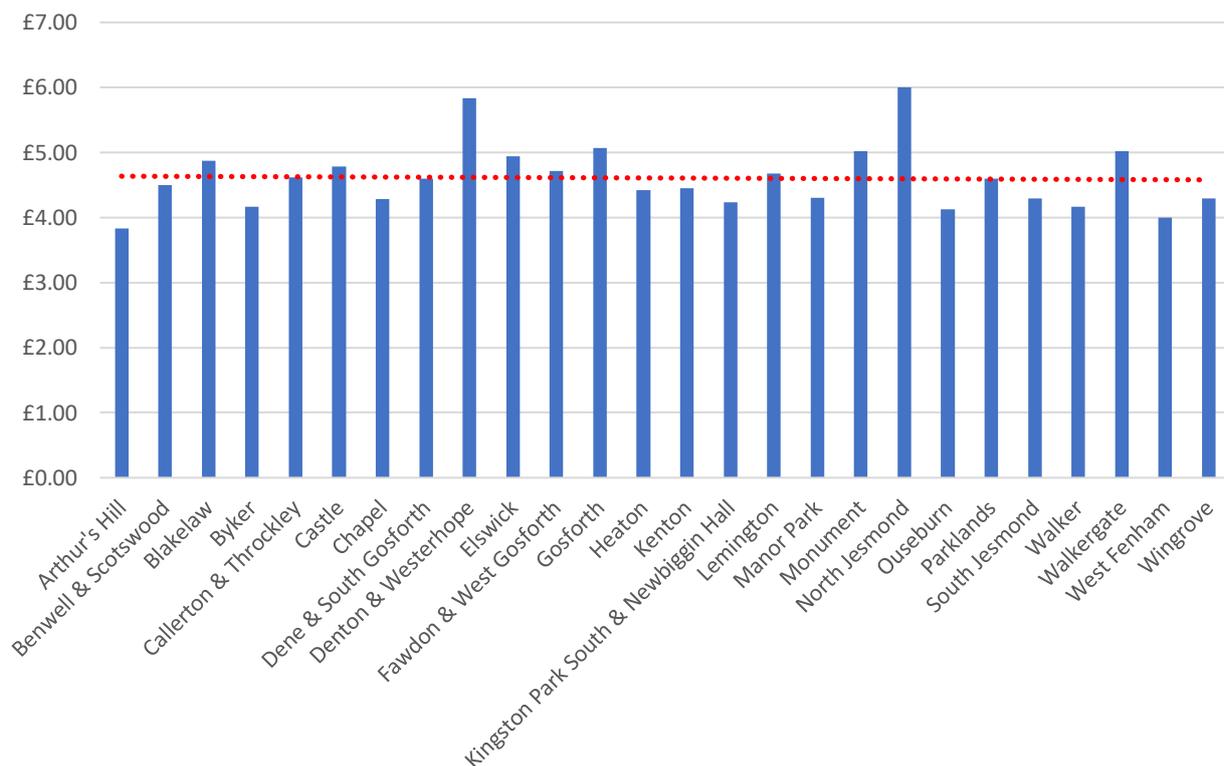
<sup>21</sup> <https://www.weforum.org/agenda/2019/04/these-countries-have-the-most-expensive-childcare/>

When comparing prices there are several other factors to take into consideration. As mentioned above, the number of hours per day and days per week will impact on cost, in full day care settings the more hours required the cheaper the hourly rate. Conversely, if a parent requires fewer hours, it may be more cost effective to choose a pre-school playgroup or a childminder instead of full day care.

It is also important to consider what is included in the care. If care is at a higher rate but includes for example a hot meal, this may be preferable to parents.

The final factor is what help, outside of the funded entitlements is available to support parents with the cost of childcare. Some parents can use tax-free childcare or childcare vouchers, others can claim some of the cost childcare through Tax Credits, Universal Credit or Care to Learn (for more information please see Childcare Choices<sup>22</sup>). It is often providers who help parents navigate what is best for them. As tax free childcare and childcare vouchers make payments directly to providers, providers must be set up and understand these schemes. In Newcastle, 173 providers have signed up for tax free childcare.

**Figures 3: Average hourly cost by ward (three-and-four-year-olds)**



In Newcastle the overall average hourly cost of childcare has remained very similar to last year at £4.72. There are however variations depending on age of the child and provider type, and there is significant variation in the range with the highest cost per hour at £9 and the lowest, when we include sponsored breakfast clubs in schools, being £0.

<sup>22</sup> <https://www.childcarechoices.gov.uk/>

The average hourly cost, irrespective of the provider type for a child under two is £4.88 for a child age two is £4.74, and for three-and-four-year-old the cost reduces again to £4.58.

There are also variations by provider type as follows:

### **Childminders**

The average hourly cost for a child under two with a childminder is £4.71, the maximum is £8 per hour and the minimum is £4. The average is slightly less for two-year-olds at £4.69, and less again at £4.65 for three-and-four-year-olds. The maximum and minimum are the same irrespective of age. Of the childminders who completed the audit, the majority (91%) charge the same hourly rate for all ages of children.

### **Full day care**

The average hourly cost for a child under two with a full day care provider is £5.46, the maximum hourly cost is £9 per hour and the minimum is £4 per hour. The average hourly rate reduces to £5.26 for two-year-olds and reduces again for three-and-four-year-olds to £5.15. Over half (54%) of full day care settings have a different hourly rate for under twos, this reduces to around a quarter for two-year-olds and three-and-four-year-olds.

Pricing in full day care settings is generally set up for full or half days and some discount given for full time. This can mean hourly that an hourly rate does not accurately represent charges to parents. Take our highest hourly cost as an example, if we divide their full-time rate by 50 to give full time hourly rate this is much lower at £4.70 nothing like the £9 per hour they charge for additional ad-hoc hours.

The average cost of a full week, or a 50-hour place is £265.51 whereas half a week or a 25-hour place is £147.26, so two half weeks cost almost £30 more than a whole week, clearly demonstrating the reduction in cost offered for full time.

### **Pre-school playgroups** (*data does not include pre-school playgroups run by school*)

The average hourly cost for a child age two with a pre-school playgroup provider is £4.38, the maximum hourly cost is £6.66 per hour and the minimum is £2.66 per hours. The hourly rate reduces slightly to £4.34 for three-and-four-year-olds. Most pre-school playgroups (93%) charge the same hourly rate for two-year-old as they do for three-and-four-year-olds.

Interestingly, the basic hourly rate (before supplements and any allocations through the inclusion fund) for three-and-four-year-olds given by the local authority is £4.35, only 1p different from the pre-school playgroup hourly rate, and the cheapest across sectors. This may be because pre-schools playgroup, see the local authority rate as a bench mark. It could also be because budgeting is simpler if income per hour consistent regardless of source.

Like full day care, pre-school playgroups don't tend to charge by the hour, typically they will charge by the session and part sessions aren't always offered. It is worth

noting here again that while hourly rates are used for comparison, in many cases care cannot be purchased hourly.

### **Out of school clubs**

For this comparison we used PVI out of school clubs only. This is because many school run clubs are sponsored or subsidised and therefore much lower in cost. Even after removing school run provision from the figures, out of school clubs still have the lowest average hourly rate at £4, for three-and-four-year-old than any other provider type. The maximum hourly rate is also lowest at £5. Once again, it would be beneficial to look at this sector as whole in more detail in a separate focused report.

### **Disability Access Fund**

Disability Access Fund is a one-off payment (£615 per child) to providers who care for children who access a three-and-four-year-old early education place and can evidence receipt of Disability Living Allowance (DLA) in time for the Spring census. The level of claims made has been low since its introduction, 2017 – 45 claims, 2018 – 30 claims, 2019 – 59 claims. In 2019 we worked harder with providers to get evidence of eligibility and used other data sources of children who might be eligible to increase the take up.

We commissioned Newcastle Action for Parents Initiative (NAPI, who employs our Inclusion workers in the PVI sector) to carry out consultation with parents, and providers and produce a report with proposals. The key proposals to be implemented in the next 12 months include:

- Develop a poster for DAF and better marketing materials including social media
- Work to improve paperwork to include a DLA question (including adding document check point on parent declaration forms)
- Improve guidance and briefings on the fund and its use.
- Request that SEND / Inclusion reviews always ask about DLA eligibility / applications
- Provide advice on use of the fund.

### **Early Years Inclusion Fund**

Newcastle now jointly funds the Early Years Inclusion Fund from Early Years and High Needs funding. This has allowed for a significant increase in funding over the last few years. Local intelligence tells us that this is higher than regional neighbours.

In Newcastle the Early Years Inclusion Fund is available for settings to help meet the needs of children with low and emerging needs as well as high needs, promoting both early identification and intervention. Each application is assessed individually, and appropriate support is offered. Support is given to meet both the needs of the child and the needs of the provider to deliver the care, and can take the form of support from staff, equipment, training, or funding for higher staff ratio.

Where Inclusion Worker or Nursery Nurse time is allocated these specialists will not only provide direct support to children, but also up-skill staff in the setting ensuring that the child gets the most effective care and support at all times.

There has been a year on year increase in the number of Early Years Inclusion Fund applications. Staff in settings have gained in confidence in early identification, and capacity within the EEAST team has been increased in order to fully meet the needs of children and setting based staff.

The Inclusion Fund is under constant review and changes are made if and when appropriate. Some examples of recent changes are;

- Flexible funding application periods mean that applications can be termly or for up to three terms depending on the needs of the child and the provider.
- Changes have been made to the eligibility criteria to include all two-year-olds, and not just those who are funded.
- A reduction in emphasis on one-to-one support to encourage providers to take a whole setting approach to inclusion.

In Newcastle the Inclusion Team are always looking for new ways to support children. It was recognised that some children could not access setting-based provision because their specialist chair was too bulky to transport. To remove this barrier Inclusion Funding has been used to purchase additional chairs that can be allocated to a provider and then reallocated once the child moves on. Similarly, Inclusion Funding can be used to access resource provided by the NAPI toy library. Providers and parents can join the library and borrow toys and equipment. There is also a librarian who can make home visits to offer help and support.

## **The Local Offer**

The local authority continues to work hard to ensure the Local Offer continues to house all the services, information and advice that children and young people with Special Educational Needs or Disabilities (SEND), aged 0 - 25 years old, and their families might need to access. All in one place, the key purpose is:

- To provide clear, comprehensive, accessible and up to date information about the available provision and how to access it, and
- To make provision more responsive to local needs and aspirations by directly involving disabled children, those with SEN and their parents, in its development and review.

## Quality and workforce

Coram Family and Childcare<sup>23</sup> reported most parents (64%) rated the overall quality of local childcare provision as very or fairly good, with just 9% rating it as very or fairly poor. These proportions are in line with the 2017 Coram Family and Childcare survey (62% and 9% respectively).

In Newcastle 58%<sup>24</sup> of funded two, three-and-four-year-olds are in settings that have staff with graduate status (52% nationally) <sup>7</sup>. There is no longer a direct funding stream for these qualifications, so it is of note that we have retained a higher than national average level of qualification.

All local authorities are required to secure training opportunities for practitioners in childcare settings. In this year we combined our early years programme with training made available to practitioners who are working in the early help arena. Early help is the way we describe the pathway to early intervention, that is the way a child or family can access help around an issue or problem at the earliest stage. This means that we have a much broader programme that is accessed by practitioners from a wide range of services including childcare provision. In the year that we are looking at for the purposes of this report, 118 practitioners from childcare settings have accessed training around a range of subjects including all aspects of the delivery of Early Years Foundation Stage, supporting children with additional needs, equality and diversity. In addition, we support practitioners to access a range of other training including safeguarding children and the Prevent Duty.

38% of funded two year olds are in an outstanding setting, this is 14% above the national average. 97% are in settings that are good or better, compared with 95% nationally. For three-and-four-year olds 32% are in an outstanding setting compared with 26% nationally, and 89% are in settings that are good or better compared with 92% nationally.

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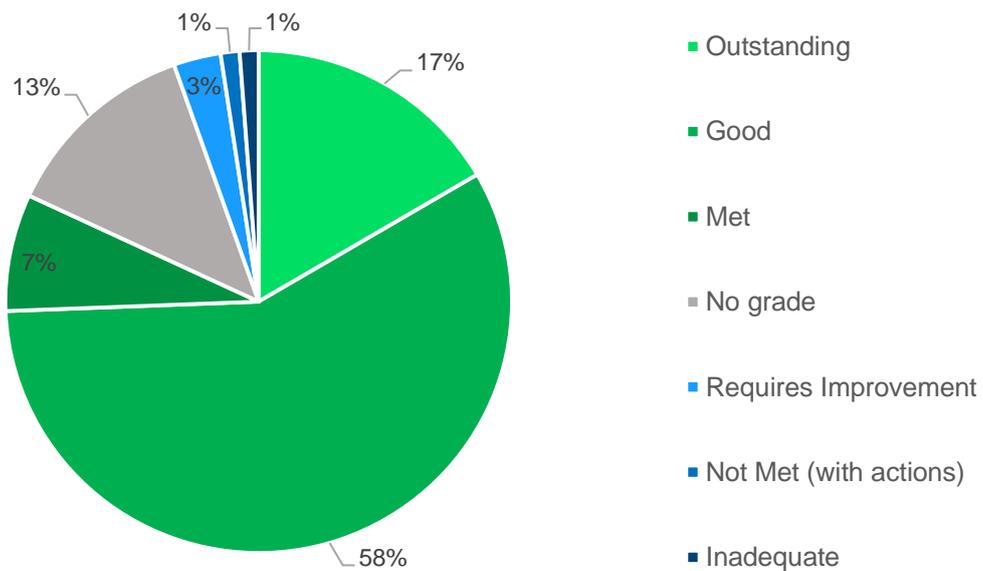
<sup>23</sup> Childcare cost Survey, 2019:

[https://www.familyandchildcaretrust.org/sites/default/files/Resource%20Library/Childcare%20Survey%202019\\_Coram%20Family%20and%20Childcare.pdf](https://www.familyandchildcaretrust.org/sites/default/files/Resource%20Library/Childcare%20Survey%202019_Coram%20Family%20and%20Childcare.pdf)

<sup>24</sup> Education provision: children under 5 years of age, January 2019:

<https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2019>

**Figure 4: Percentage of providers by Ofsted grade**



**Table 7: Ofsted grade by provider type** (Providers who have not been inspected have been removed).

	Good or better	Less than good
Childminders	93%	7%
Full Day Care	97%	3%
Out of School Clubs	100%	0%
Pre-School Playgroups	94%	6%
Schools	90%	10%
Special Schools	100%	0%
<b>Total</b>	<b>94%</b>	<b>6%</b>

94% of graded settings in Newcastle are rated Good or better. Within this, full day care has the largest proportion (50%) of outstanding settings.

## Funded entitlements

### Targeted two-year-old entitlement

Approximately 40% of two-year-olds are eligible for fifteen hours of funded early education, for 38 weeks of the year. Nationally take up rates for two-year-olds fell from 72% in 2018 to 68% in 2019. Locally the rate also fell but remains well above the national average at 85% - or 17% above the national average<sup>7</sup>.

**Table 8: take up rates for two-year-olds**

Year	Newcastle Take-up	National Average	% points above the National Average
2019	85%	68%	17
2018	103%	72%	31
2017	92%	71%	21
2016	88%	68%	20
2015	76%	58%	18

Our local reduction in take-up is mainly attributed to a reporting issue as Newcastle was an early rollout area for Universal Credit and some of these families were eligible and took up a place but did not appear on the eligibility list which we believe led to slightly inflated take up for Newcastle in 2017 and 2018. We believe our take up data is now much more reliable, and we continue to remain well above the national average.

We continue to see an increase in the numbers of childminders delivering funded places. However, the overall number of providers delivering funded places fell by five between January 2018<sup>25</sup> and January 2019<sup>26</sup> due to setting closures. We are aware that the number of pre-school playgroups in the city closing and the changes to the types of provision may have disproportionality affected take up of two-year-old entitlement. This is something we want to keep working on. In previous years we have seen more schools delivering two-year-old places for the first time. This year only one new school has changed to offer places for the first time, while another has reduced the number of two-year-old places they can offer.

### Universal offer

All three-and-four-year-olds are eligible for fifteen hours of funded early education, for 38 weeks of the year or term time. This is available from the term after a child's

<sup>25</sup> Education provision: children under 5 years of age, January 2019:

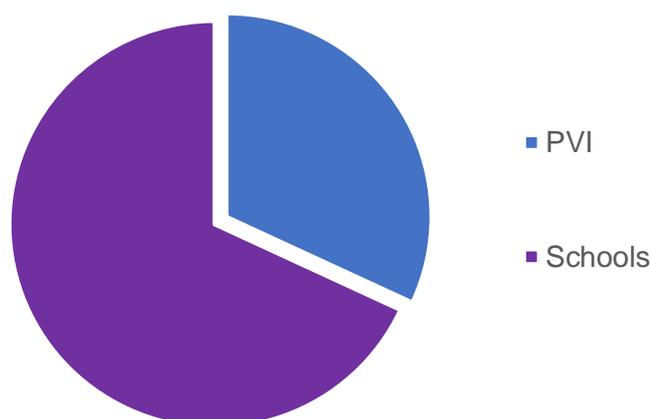
<https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2019>

<sup>26</sup> Education provision: children under 5 years of age, January 2018:

<https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2018>

third birthday until the child starts school. Funded hours can be used all year round to suit parental need. Nationally take up rates for three-and-four-year-olds have remained stable since last year at 94%. In Newcastle take up rates have also remained stable, but one percentage point higher (95%) than the national rate and have increased year on year since 2016.

**Figure 5: Number of three-and-four-year-olds benefiting from funded early education places by type of provider<sup>27</sup>**



As reported previously<sup>28</sup> most three-and-four-year-olds take up their universal offer in a school setting. While this remains the case, there has been a slight shift from schools to PVI, with the percentage of children attending PVI setting up from 30% to 32%.

### Early Years Pupil Premium (EYPP)

EYPP was introduced in 2015 and is additional funding for children who are accessing the Universal Entitlement and meet the eligibility criteria as set out by DfE in the Early Education and Childcare Statutory guidance for local authorities on the provision of early education and childcare<sup>29</sup>. In Newcastle we continue to work hard to maximise take up through, easy transition for funded two-year-olds and collaborative working with the Free School Meals team to ensure, as far as possible families only need to apply once, and automatic allocations can be made. The percentage of children in receipt of EYPP is 17%. Less than it was last year 19% but still higher than it is regionally (13%) and nationally (8%).

<sup>27</sup> Education provision: children under 5 years of age, January 2019:

<https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2019>

<sup>28</sup> Newcastle upon Tyne Childcare Sufficiency Report 2018:

<https://www.newcastle.gov.uk/sites/default/files/early%20years%20and%20childcare/Childcare%20Sufficiency%20Report%20%20final.pdf>

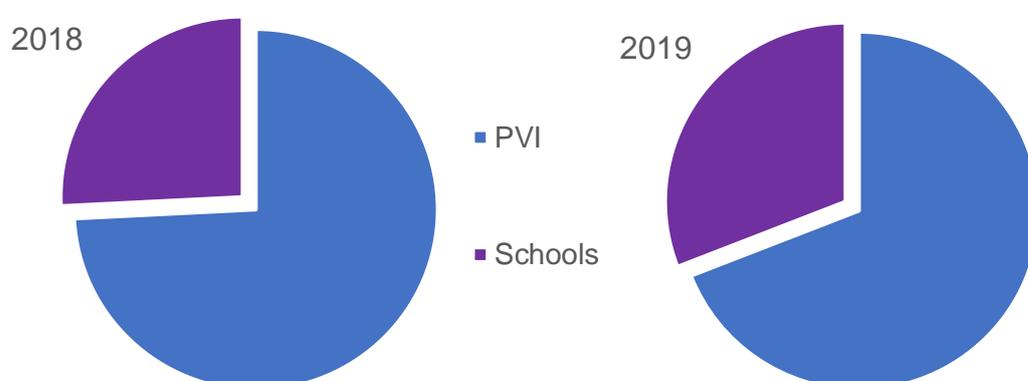
<sup>29</sup> Early education and childcare Statutory guidance for local authorities on the provision of early education and childcare: <https://www.gov.uk/government/publications/early-education-and-childcare--2>

## Extended entitlement

In addition to the Universal offer some three-and-four-year-olds can access an additional 15 hours of early education and childcare if they meet the eligibility criteria as set out guidance from DfE<sup>22</sup>.

Both the number of children accessing the extended entitlement and the number of providers delivering increased in January 2019<sup>30</sup> compared with January 2018<sup>31</sup>. The number of children has increased by 6%. For providers the increase has been in the schools' sector, with ten more schools offering the extended entitlement. As mentioned earlier there has also been an increase in the proportion of children taking up their extended entitlement in the school sector.

**Figure 6: Change in the proportion of children taking up the extended entitlement by Sector**



12% of the children accessing the extended entitlement in January 2019 used this funding with more than one provider. This shows that some parents continue to utilise a combination of provision to meet their needs. There are several providers, a combination of pre-school playgroups, out of school clubs and childminders who pick up or drop off from nursery classes, working in partnership to offer the extended entitlement.

With the introduction of the extended entitlement, one concern was that providers choosing to offer more hours may not have the space to take as many children (one child accessing 30-hours is equivalent to two children accessing 15 hours). Of particular concern was the possibility of this displacing children eligible for two-year-old funding. To assess this, providers were asked if they had limited childcare places for two-year-olds because of the extended entitlement for three-and-four-year-olds. Only three providers reported limiting or reducing places, suggesting this concern has not been realised. What seems to be the case instead is that some larger settings have increased capacity and are offering more hours if required. With this change some smaller providers who have shorter opening times (predominantly pre-

<sup>30</sup> Education provision: children under 5 years of age, January 2019:

<https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2019>

<sup>31</sup> Education provision: children under 5 years of age, January 2018:

<https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2018>

school playgroups) have struggled to compete meaning they are unable to maintain sustainable numbers.

Moving forward we will streamline processes through continued development work with Northumberland County Council on the online solution (the Wizard) which was rolled out to childcare providers in early 2019. This enables providers to check eligibility for 30-hour children. From 2020 this will be expanded to include checks for all funded children, EYPP as well as payment claims and headcounts. This will bring together all eligibility checking and funding claims into one on-line solution.

## Further Developments

### Strategic Housing Development

There is significant housing growth planned across the city, with 17,589 new build units expected between 2018 and 2030<sup>32</sup>.

There are eight housing development sites identified in the Core Strategy for Newcastle. These are predominantly in the North and Outer West of city:

- Callerton (Middle, Upper and Lower)
- Kenton Bank Foot
- Newbiggin Hall
- Throckley
- Hazlerigg / Wideopen
- Dinnington
- Newcastle Great Park (NGP) further expansion
- Newburn

In addition to the planned housing in Newcastle, neighbouring local authorities (Gateshead, Northumberland and North Tyneside) have also developed plans for housing growth. This could impact on Newcastle providers as previously identified there is some cross-border travel by families in both directions.

The map below shows the proposed new housing development sites, along with current (at the point of data collection) early education and childcare provision. For further details on housing development sites please see: <https://community.newcastle.gov.uk/mapping/helaa-map>

From the map it is clear that providers are densely populated in the built-up areas of the city and that if this density is to be replicated in the new development areas new provision will need to be established by 2030. However, as identified earlier in this report there seems to be a trend of reducing the overall number of providers and increasing capacity in established provision.

In terms of a local market response to housing development, Newcastle Great Park is an example of an established but still expanding development site, with significant housing development over the last 5-10 years. In response to this development Brunton Day Nursery successfully secured capital funding to expand and increase the setting by one room in 2017 and Plant Pots Playgroup had already expanded in 2016 taking on a second room. In addition to the expansion in setting-based provision seven childminders have registered creating an additional 54 places. No additional setting-based provision has yet been established, providing further evidence of the trend for setting-based provision is expanding rather than open new.

As part of the overall development plan, developers, landowners and the local authority have been working together to ensure that alongside housing there is also

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<sup>32</sup> Newcastle Local Plan: Education Plan: [https://www.newcastle.gov.uk/sites/default/files/2019-01/ncc\\_local\\_plan\\_education\\_-\\_october\\_2018.pdf](https://www.newcastle.gov.uk/sites/default/files/2019-01/ncc_local_plan_education_-_october_2018.pdf)

education provision and community facilities and services. This is because it is understood that overall infrastructure will ensure that development sites are sustainable, vibrant communities where people want to live. Extensive work has already been carried out to predict school place demand created by new housing.

To ensure that the early education and childcare needs of these new communities are fully considered we plan to work with education and extend down pupil forecasting to include children age 0-4 in each of the school planning areas. Working with Education in these planning areas will allow us to utilise established, credible modelling techniques, and potentially make joint future proposals.

Pupil yield modelling for school age children is currently used to help calculate the appropriate contribution from developers into school site development. Similar modelling could be used to identify the expected numbers of early years children generated by the proposed new housing. Producing joint pupil yield modelling could be key in securing additional funding contribution from developers particularly in light of guidance published by The Department for Education<sup>33</sup> which states, that for local authorities to meet their sufficiency duty “All new primary schools are now expected to include a nursery. Developer contributions have a role to play in helping to fund additional nursery places required as a result of housing growth, however they may be provided, where these are proposed as part of school expansions or new schools.” While this guidance cannot be applied retrospectively to planning that is underway it is vital that education and early years work closely to provide joint pupil/child forecasting that can inform future planning.

As an example, pupil yield estimates suggest that by 2023 1,412 primary age children will live in a house on new development sites. Using this data, and assuming the number of children will be the same in each age group, this could indicate an additional 200 pupils in each year group (reception to year six). Using the same assumptions, we could then predict an additional 200 nursery age children in the city in the same time period.

There are of course many unknown factors associated with this prediction. There is a timetable for the housing developments, which is subject to change due to planning application and housing market demand. It is also not known how many of these families will be new to the city and how many will be relocations within the city. The final unknown, as ever, is what proportion of these families will choose to use formal childcare, what proportion will use informal arrangements, and what proportion will choose not to use any form of childcare. The above should not be taken as indication that an additional 200 nursery places are required in the North and Outer West of the city as this is not the case. ONS estimates suggest that population increases will be greatest in the children and young people age 10-19, and local pupil projections suggest that there will be 2% increase in the primary school sector (reception to year six) and 21% increase in the secondary sector over the next five years. However, neither the ONS nor the pupil projection model consider additional growth in population resulting from housing development site.

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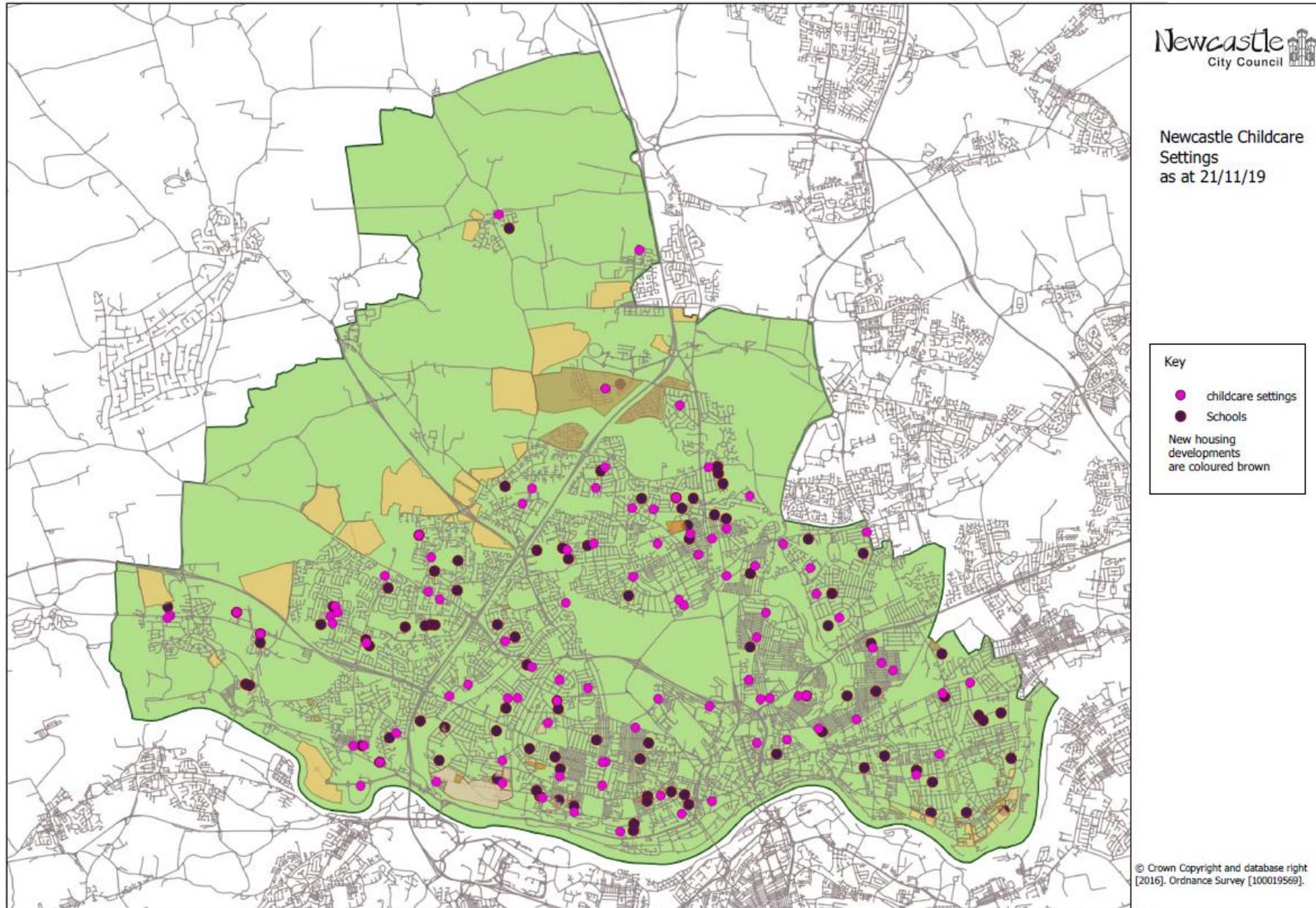
<sup>33</sup>[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/843957/Developer\\_Contributions\\_Guidance\\_update\\_Nov2019.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/843957/Developer_Contributions_Guidance_update_Nov2019.pdf)

In 2017, Opinion Research Services (ORS) were commissioned by Newcastle and Gateshead Councils to undertake a Strategic Housing Market Assessment (SHMA), as part of this population estimates were made. The key differences between the ONS estimates and ORS estimates are:

1. ORS estimates are higher than ONS
2. ORS predict a continued increase in the primary age population till 2030, were as ONS predicts a slight decrease.

Moving forward any early years' population projections will need to consider, along with historic data and health data, all three (Pupil Yield Model, ONS estimates and ORS estimates).

**Figure 7: New housing development sites with current early years and childcare provision**



## Conclusions

The report illustrates that Newcastle continues to have sufficient, good quality childcare to meet current demands. However, the report also highlights the correlation between distance travelled and deprivation, meaning our most deprived families are traveling the shortest distances to access provision, and suggesting that these families have fewer choices around childcare due to for example, the cost associated with travel. We know in Newcastle that higher deprivation does not mean lower demand for childcare as take-up of the universal offer for three-and-four-year-olds and targeted offer for disadvantaged two-year-olds is higher than or equal to the national average (see funded entitlement section).

At the same time there has been a reduction in the number of setting-based providers, with a trend for expansion rather than new provision. While this allows the number of places city wide to remain high, it inevitably gives parents fewer choices of settings while potentially increasing travel distances. This could be a concern for families living in areas of deprivation, as this could further reduce the choices they have. Conversely, a more flexible childcare offer in a larger, more sustainable setting could be beneficial. It is vital that we continue to work closely with practitioners in our community family hubs to ensure that the childcare offer continues to meet the needs of families and that distance does not become a barrier to take up, particularly for vulnerable families.

The increases in the city's child population is predicted to continue and may be exacerbated by the planned housing development areas to the north and outer west of the city. Unfortunately, the timing of the developments is such that demand for childcare is currently not high enough to impact on near-by settings, resulting in some setting in some closures. While it is clear from Newcastle Great Park that the market can respond, it is possible that this response could be more proactive. Working closely with education to make predictions around growth in population of children 0-5 could be the key to both proactive sufficiency and developer investment in 0-5 provision, particularly in light of guidance published by the DfE stating that all new primary schools are now expected to include a nursery.

## Recommendations

### **Early years Sector Support Team should:**

- Continue to review and take onboard feedback from providers and partners to improve take-up and local systems, including strategies to overcome barriers for parents and employers to taking up free childcare.
- Continue to monitor the pre-school playgroup numbers to ensure that parents, particularly of children accessing two-year-old or universal three-and-four-year-old funding, can choose provision close enough to make walking to and from a three-hour session logistically viable.
- Continue to monitor take-up of two-year-old places and ensure that any reductions are a result of stabilisation in the reliability of national universal credit data and not a reaction to the reduction in setting-based provision. At the same time, we intend to investigate take-up in specific communities, for instance BAME families.

- Work with the out of school club sector to consider creative ways of engaging, while being mindful of the contains of the sector.
- Continue to monitor childminder numbers, including places to assess whether the increase continues and remains sustainable across the sector, particularly as childminders continue to provide the most flexible care, and their role in the extended entitlement offer continues to grow.
- Conduct a parent survey to assess any unmet or poorly met demand, potential barriers to childcare, how parents wrap-around the school day (both formal and informal care) and holiday provision.

## Glossary

**Childcare on domestic premises** four or more people who work together from one of their homes to look after children up to the age of 8 years

**Childcare on non-domestic premises** group childcare based outside of a domestic home

**Childminders** look after children up to the age of 8 years in the childminder's home

**Childminding on non-domestic premises** childminders can apply to work for up to 50% of their time from a venue that is not their home. If Ofsted agree they can do this, they must meet the requirements for Childcare on non-domestic premises

**Full day care** usually from birth to reception age, offering five- or ten-hour sessions

**Home child carer** (on Voluntary part of the Childcare Register only) – nannies or people who look after children in the child's own home

**Income Deprivation Affecting Children Index (IDACI)** measures the proportion of all children aged 0 to 15 living in income deprived families

**IDACI Decile** Deciles are calculated by ranking the 32,844 neighbourhoods in England from most deprived to least deprived and dividing them into 10 equal groups. These range from the most deprived 10% of neighbourhoods nationally to the least deprived 10% of neighbourhoods nationally, as shown in the table below:

Decile	Decile description	Ranks
1	10% most deprived	1 to 3,284
2	10% to 20%	3,285 to 6,568
3	20% to 30%	6,569 to 9,853
4	30% to 40%	9,854 to 13,137
5	40% to 50%	13,138 to 16,422
6	50% to 60%	16,423 to 19,706
7	60% to 70%	19,707 to 22,990
8	70% to 80%	22,991 to 26,275
9	80% to 90%	26,276 to 29,559
10	10% least deprived	29,560 to 32,844

**Lower Super Output Areas (LSOA):** geographical areas of a consistent population size with fixed boundaries. The comparability and stability of the geography is a key benefit to users of statistics which cannot be provided by other small area administrative geographies such as wards/electoral divisions or parishes.

**Out of school club** group care for school age children, can include a combination of before and after school and school holidays

**Out of hours care** childcare before 8am, or after 6pm Monday to Friday, or any childcare at the weekend.

**Pre-school playgroups** usually for three-hour sessions, for children aged 2 years and over

**Pupil Yield Model** identifies expected numbers of primary and secondary age pupils that might be generated by the proposed housing mix (as provided by developers and through planning applications).

**PVI** Private, Voluntary and Independent sector organisations that deliver childcare

**Setting** collective term for any individual provision on non-domestic premises

**The Core Strategy** and Urban Core Plan is a strategic planning framework that will guide development in Newcastle and Gateshead to 2030. It is the first part of both councils Local Plan, containing an overall vision and spatial strategy to deliver economic prosperity and create lifetime neighbourhoods. The Plan covers the whole of the area within the administrative boundaries of Gateshead and Newcastle and includes strategic policies and specific policies for the Urban Core, Sub-Areas and sites.