



Gloucestershire Childcare Sufficiency Duty Report

June 2025



Director Foreword

Every parent wants to give their child the best start in life. From conception through to starting school, that positive early development is vital to ensuring children are ready to take their next steps, starting school ready to learn and with the foundations for good life chances.

Whilst parenting has the greatest influence on a child's early development, other factors, such as socio-economic status, early education and care also play an important role. Parents are not alone as they try to ensure they provide the sensitive, attuned parenting that children need. High quality, accessible early years and childcare provision is a key contributor to that 'best start', establishing a solid platform from which a child can progress. Research shows that this is particularly true for children and families facing the greatest disadvantage. High quality early education can reduce inequalities in educational outcomes for children with additional needs and those facing disadvantage.

The government have recognised this and are supporting those early years through its [Best Start in Life Strategy](#) and its mission to ensure that at least 75% of children achieve a Good level of Development by the end of their reception year. To achieve that, we must work together and ensure we have the highest quality provision for our children.

The 2025 Child Care Sufficiency Duty Report provides a full overview of the capacity, distribution and quality of Early Years' provision across Gloucestershire. It highlights the breadth and diversity of provision and foregrounds the challenges faced by the sector as it strives to continue to meet the needs of children and families in Gloucestershire.

Providers have worked incredibly hard over the past year, meeting the challenges of rising costs, facing recruitment and retention difficulties

and responding to the demands of the increased childcare duty and wraparound care. Their adaptability and resilience is nothing short of phenomenal and yet, we will be asking for more in the forthcoming year if we are to continue to meet the needs of the county's youngest children. Early years providers, together with schools have shown incredible commitment and resourcefulness in these challenging times and I wish to use this foreword to thank them for another fantastic year.

As we look forward to meeting the challenges of the forthcoming year, the Early Years and Childcare Service remains dedicated to working closely with the sector and to ensuring the day-to-day realities are represented to national decision makers, with the importance of maintaining quality as we grow capacity, at the heart of all we do.

As a result of this strong and collaborative partnership approach, the sufficiency assessment shows that capacity has been sustained overall, and the quality of provision has further improved.

This Sufficiency Duty report also provides a key piece of evidence to support the work of the multiagency Starting Well subgroup of the Children and Young People's Wellbeing Coalition, overseeing the delivery of the Starting Well pillar of our [One Plan for all Children and Young People](#).

Together we have set out the steps the council will take to sustain and develop the local provider economy over the coming year, sustaining quality and improving outcomes. The Sufficiency Strategy will be refreshed on an annual basis to ensure it contributes to a sustainable and vibrant local early years' offer. I am grateful to partners across the sector for their contribution and sustained commitment.

Ann

Ann James - Executive Director Children's services

Executive Summary

This Childcare Sufficiency Duty Report was undertaken in accordance with the Childcare Act 2006, and the associated statutory guidance: Early Education and Childcare - Statutory guidance for local authorities April 2025. The Childcare Act gives local authorities a duty to secure, as far as is reasonably practicable, childcare provision for children aged 0-14 (or up to 18 for disabled children). The provision should be sufficient to meet the requirements of parents/carers to enable them to work, or undertake education or training leading to work, and for their child to access their free entitlement childcare place.

The Act requires local authorities to carry out an assessment of the childcare in their area and produce an annual report for Council Members on how the duty is being met, and to make it available to the public. The Act places a statutory duty upon local authorities to play a strategic role in facilitating the childcare market. The sufficiency duty report gives local authorities the opportunity to work with local partners, filling gaps in the market and shaping childcare and services in their area to provide the best possible provision, which meets the needs of local families.

The aim of this Childcare Sufficiency Duty report is to provide an overview of the Early Years sector and to present an analysis of childcare supply and demand in Gloucestershire. This includes information about particular age ranges of children, affordability, accessibility, quality of provision and details identified sufficiency gaps and emerging concerns and how these will be addressed. This acknowledges the sufficiency of childcare /early education provision as a critical element within the wider network of arrangements giving the children of Gloucestershire the best start in life, interlinked with a range of support pre-birth to pre-school. Along with primary, secondary, further and higher education, early years provision is an integral element of the local education system in Gloucestershire.

It is important to note that this sufficiency assessment has been completed during the implementation of the Governments Childcare Reforms; expanding the entitlement of early education/childcare for working parents and the two-year Wraparound Childcare Programme aimed at ensuring that all primary aged children have access to childcare before and after school. Both elements of the reforms pose additional challenges for the Council, to support a fragile childcare system to expand to create the additional places required to successfully delivery the programme

The first three years after birth are one of rapid growth and development, as a child's brain creates complex neural pathways at an unprecedented speed. These early experiences, both good and bad, lay the foundation for a child's future survival, growth, health, and wellbeing. Research has consistently shown that good early childhood development will have a direct positive impact on a child's long-term health outcomes and will improve future opportunities, school attainment and even earning potential.

Research undertaken as part of the study of early education and development (SEED) clearly tells us that accessing early education and childcare (ECEC) provision is associated with improvement in children's cognitive and socio-emotional development at age three. This is in line with findings from the Effective Pre-school, Primary and Secondary Education (EPPSE) study, which found that ECEC continues to relate to improved cognitive and socio-emotional development through primary and secondary school.

Early years settings have a hugely positive impact upon children from disadvantaged backgrounds, giving them access to resources and experiences they might not have at home. Quality settings can reduce the gap in development for children and ensure all children start school reaching a good level of development as they enter year one.

The Early Years Foundation Stage (EYFS) sets the standards that all early year's providers must meet to ensure that children learn and develop well and are kept healthy and safe and its implementation and

compliance is mandatory for all Early Years providers. Changes to the framework were introduced in January 2024.

There are now two statutory frameworks:

- The EYFS Statutory Framework for Childminders
- The EYFS Statutory Framework for Group and school-based provision

The first education attainment marker for young children is taken at the end of the early years foundation stage (EYFS) when the child is aged five.

For many years prior to 2019, the percentage of children in Gloucestershire achieving a good level of development (GLD) at the end of their EYFS Reception year was lower than the national average. This was due to several factors that were addressed through a multi-agency working group. As a result of this and ongoing work with partners, the percentage of children attaining GLD has increased in the past few years, placing Gloucestershire marginally ahead of the national total (67.2%) at 67.8% in 2023 and 68.2% compared to the national total 67.7% in 2024.

However, in Gloucestershire a significantly lower percentage of children eligible for free school meals attained GLD (51%) compared to those not eligible (70.9%). Similarly, a significantly lower percentage of children from Asian/Asian (61.2) British, Black African/Caribbean (56.1%) attained a good level of development than their white British peers (69.9%). Data illustrating attainment gaps is presented on pages 25-31 of this report.

Further work to address these attainment gaps is set out in the Starting Well pillar of the Children and Young People One Plan, including the development of a Best Start in Life core offer for all families that will be delivered through the development of Family Hubs and Family Hub networks, as we build stronger partnership arrangements to provide a robust universal offer for all families.

Children's entitlement to 15 hours (30 hours for some) a week of early education aims to ensure all children have the fundamental skills required for learning so that when they move into statutory education they are "school ready". School readiness has a huge impact on a child's life chances and not reaching a good level of development can have detrimental effects as children move through school and later life. Some of these include poor health, increased chances of turning to crime, lower achievements at school and adult poverty.

Therefore, early years settings are so important for children's development. Not only do children need access to early years settings within their community, but these settings also need to be high quality. High-quality settings have the biggest impact and are the settings which enable children to reach their full potential and support them in reaching good levels of development.

The quality of childcare in Gloucestershire is high; of those providers inspected, Gloucestershire currently has 91.9% of childminders that received a good or outstanding Ofsted outcome and 8.1% compliant /met. 92.1% of day care providers have a good or outstanding Ofsted outcome with 4.4% compliant/met. When added together, compared to the same time in 2024 this is an increase of 0.9% for childminders and an increase of 1.6% for day care providers.

The take-up of the funded early education offer for disadvantaged 2-year-olds (those whose parents are in receipt of specified income support) in Gloucestershire was 5.0% lower than the national figure in January 2025 (60.2%, National 65.2%). Current take-up of this offer is at 55.2% in Gloucestershire. Other LAs report that their local take up percentage has decreased significantly. However, this does not accurately reflect take up for this cohort. As part of the childcare reforms, all children over the age of 9 months are entitled to funded childcare if parents meet employment criteria. Many parents are now entitled to both the childcare offer for disadvantaged 2-year-olds and for the working parent childcare offer. The DFE have advised that, in

this case, parents should claim 15 hours per week under the disadvantage offer and any additional hours under the working parent offer. However, given the complexities of the parent eligibility checking system, many parents have chosen to claim entitlement for all hours under the working parent offer, resulting in them not being included in the disadvantaged 2-year-old offer take-up data.

Increasing take-up continues to be a priority for the Early Years' Service, in partnership with Children and Family centres, public health teams and family hub networks. We continue to work with partners to identify our most vulnerable eligible 2-year-olds that are not taking up their entitlement and actively engaging with those families to encourage this.

The take up of universal funded early education for 3- and 4-year-olds in Gloucestershire at 95.3% is higher than the National percentage of 93.1%.

There are currently 593 early education/childcare settings across the county, providing 15,044 childcare places for children aged 0-5 years. These are made up of 248 childminders, 154-day nurseries, and 175 pre-schools, 15 Nursery units in independent schools, 1 creche. There are currently 294 out of school care settings and 82 holiday settings which are a mixture of schools, private providers and childminders. Some of the out of school providers do also offer some holiday care as well.

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there has been a 2.6% (16) decrease in the number of early years providers and a 0.8% (118) decrease in the overall number of places. Through the National Wraparound Childcare Programme, the Local Authority has supported 51 schools to expand or create new 1128 places for primary school aged children to access care from 8am to 6pm during term time which will be up and running from September 2025. In addition, a further 65 wraparound providers have been identified who are going to be contacted to further support expansion and creation of places. This is a 39% increase in the

number of known wraparound childcare providers in the county. As the project is ongoing the figures quoted in this document reflect the current situation which is rapidly changing.

For Holiday providers there has been a 2.4% (2) decrease in the number of providers and a 9.1% (222) decrease in places.

The reduced number of providers and subsequently childcare places reflects the continued and increasing challenges faced by the sector, locally and nationally, in relation to rising delivery costs. The introduction of the expanded funded childcare entitlement has resulted in more children accessing childcare at the Government funded rate. This has impacted on the opportunity for providers to enhance income revenue from parental funded hours at a higher hourly rate.

The impact of rising costs, the low hourly childcare rate, and increased running costs has led to some nurseries struggling to retain qualified staff, and to ensure long term sustainability. Vacant practitioner posts have forced some providers to reduce the number of children able to access the setting, close rooms within nurseries or sessions within pre-schools where they have been unable to meet demand due to lack of staff. Whilst there may be available places in childcare settings in other parts of the locality, they are very often not practical for families to access due to the distance of travel. This is a particular issue in some of the more rural parts of the county such as in the Cotswolds where small villages/communities each have a limited number of Early Years and childcare places.

Providers continue to report that they are seeing an increased number of children requiring additional support particularly with regards communication, personal, social, and emotional development. This is adding additional pressure from a staffing perspective in an already challenging recruitment landscape.

Pre-registration briefing sessions are offered for those interested in becoming registered childminders. There has been very little increase in numbers attending these information sessions despite the

Government introduction of financial incentives alongside the National 'Do Something Big' recruitment campaign

We continue to monitor Early Years providers in the county to identify and monitor occupancy levels and future sustainability. Through this work we have implemented a programme of business support. This includes business health checks and providing information, advice, and guidance on maximising potential income. We continue to prioritise support to settings in areas where sufficiency of childcare places is at risk.

As of June 2025, the Early Years Business Support Team have 42 open referrals. Support in relation to financial sustainability, recruitment and business planning are the most common reasons for referral. In addition to this there has been a marked increase in requests for support linked to the voluntary charges guidance which changed in Feb 2025 and has resulted in many more concerns raised by parents as well as providers seeking reassurance. The training offer including "Committee Roles and Responsibilities", "staff recruitment and retention" and "Business Planning" is being reviewed so that it can include specific support for out of school providers that now make up 36% of all providers who may need support. Uptake of the current training programme has increased over the past year.

The Childcare Reforms, announced in Spring 2023, extend the entitlement of funded childcare in the early years, so that by September 2025 all children aged between 9 months and 4 years will be entitled to up to 30 hours of funded childcare if parents are engaged in employment. In addition, the Government's ambition is for wraparound childcare to be accessible to all primary school aged children, where parents need/want this. To deliver the extended offer the Council is working with local providers and schools to increase early years and childcare provision.

At end June 2025, an additional 526 Early Years places have been created as part of the expansion programme and 1128 additional

before and after school childcare places through the Wraparound Childcare Programme.

Despite the significant challenges of the past few years, the available childcare provision in Gloucestershire remains sufficient to meet demand in most, but not all, areas of the county, with some specific areas struggling to meet the demand for places. The Early Years and Childcare Service is targeting support to increase wraparound childcare places in Cotswolds: Chipping Campden and Tetbury; Stroud: Dursley, Painswick and Stroud; and Gloucester: Abbey, Matson and Tuffley and early years places in Uley and Bishop's Cleeve. More detailed Information about each locality of the county is set out in more detail in this report (pages 44 to 89)

It is difficult, to understand fully if we have sufficient childcare for all children with SEND. However, to be compliant and to ensure we are working together to improve outcomes and reduce inequalities, and with EY providers reporting a significant increase in the number of children with additional needs it is essential to further examine the needs of this group and the supply of appropriate provision. The primary barrier is the collation of data; with the EY sector made up of private, voluntary, independent and charity-based providers there is no duty for them to provide the council with required data. To address this, the Early Years' Service completed an exercise to explore how many children in Reception and Year One classes in schools with an EHCP accessed an early years provision in their preschool year. Of the 310 children included in the study, 288 (93%) accessed an Early Years setting. Of those 288 children, 91 are now attending a special school setting. This would indicate that most children with SEND, even those with higher levels of need, were able to access an Early Years setting. This is further explored in the SEND section of this report. To increase the number of young children with SEND who do not access an EY provision, the team have included transition funding via SENIF to support these children moving to an EY setting for the first time. This is part of a comprehensive SENIF package of support available to the EY sector.

As evidenced through the study referenced above, for most children with special educational needs and disabilities (SEND) early education/childcare is available within mainstream provision and for those with education, health and care plans (EHCP) special schools offer early years' places where this has been assessed as appropriate to meet the needs of the child.

However, for some children with the most complex needs, mainstream settings find it difficult to support developmental progress and/or to offer the full entitlement. Following the successful delivery of a pilot, in January 2024 we commissioned the delivery of 2 Ofsted registered Early Years centres for children with SEND. The aim of this provision is to ensure that all children can access their entitlement of early education, to improve outcomes for young children and to reduce inequalities between children in greatest need and their peers (Statutory Guidance and section 2 Childcare Act 2006). Details of this provision, its impact and decisions regarding future Early Years SEN provision are set out in the SEND section of this report on page 93.

We have reviewed and updated our SEN offer for children attending Early Years settings and for younger children still at home. Clear guidance on SEND support, including information about inclusion support funding for mainstream provision has been published and is available on the Early Years webpage.

We continue to review local provision especially when considering new housing development. New housing may require additional Early Years places to be provided to meet demand for childcare in these new localities. We are continuing to monitor the Early Years market and work closely with colleagues within GCC to ensure that additional places are developed in the area required and to meet the requirements of the families moving into those developments.

Childcare provision offered across the county is flexible with a full range of delivery models available for the funded entitlement. This

includes term time and all year options, morning or afternoon sessions, and full days for 30 hours delivery.

Whilst the number of early years childcare providers has decreased, particularly childminders, there remains sufficient capacity to meet current demand in most, but not all areas, in Gloucestershire. Robust plans are in place to address the most significant sufficiency gaps identified across the county.

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Introduction

Gloucestershire County Council Early Years and Childcare Service

Gloucestershire's Early Years and Childcare Service is a county wide service comprising of a total of 33 full time equivalent staff. Staff are configured into the Early Education & Child Development Team (Quality, Inclusion and Child Development & SEND), Childcare Sufficiency and Business Support, Finance Team, Early Years Foundation Stage (EYFS) in schools Quality and Improvement Officer and an Early Years Development Officer. The service provides a range of support services to children and families, Early Years and Childcare providers and schools and works in partnership with a range of other agencies and commissioned providers to ensure a joined up Best Start in Life offer.

The aim of the Early Years' Service is to improve outcomes and reduce inequalities for all children aged 0-5 years, by:

- Ensuring all children have access to high quality early years' education/childcare provision through maintaining sufficient provision and building the quality and capacity of early year's providers across the maintained, private, voluntary and independent sector.
- Supporting good transitions to school and supporting schools to ensure that children receive good quality teaching, learning and play experiences in their reception year enabling them to be safely included and to make good progress.
- Ensuring that our most vulnerable children (pre-birth to 3) have access to universal and targeted provision within their communities to enable parents to be confident in supporting their child's development and giving all children the best start in life.

- Having systems in place to identify and support children with additional needs/SEN as early as possible, providing a higher level of intervention for children with the most complex needs.

The Early Education and Child Development Team

This team previously operated as a locality-based model but in January 2024 moved to a functions-based model as follows:

- Lead partnership working in the locality to bring together all key partners to ensure a joined up, holistic approach to the provision of good quality early years education and care, achieving good outcomes for individual children.
- Offer professional information, advice, guidance and support to providers and other professionals to ensure children in early years settings achieve positive outcomes - in line with Welfare and Safeguarding, Early Years Foundation Stage (EYFS) and SEND frameworks.
- Manage targeted interventions and support for settings and childminders, including the implementation of the Early Years Intervention Programme for all settings that have been judged as "Requires Improvement" or "Inadequate" by Ofsted.
- Deliver a 12-month programme of enhanced inclusion support to targeted providers in areas of deprivation and those with high levels of children with SEND culminating in an Early Years Inclusion Champion award for settings who can evidence standards of good inclusive provision for all children.
- Development of an online platform with quality assurance and enhanced support to enable providers to work towards the Early Years Inclusion Champion status.
- Provide and commission a range of training for early years settings including level 3 accredited Special Educational Needs Co-ordinators (SENCO) qualification, Communicating Together, SENCO in the Early Years, Managing Behaviour, Supporting Children's Sensory Preferences & Needs and Getting It Right for Boys.

- Development and rollout of the Ready for Learning Toolkit to support practitioners to identify and support children in their pre-school year to be ready for their education in reception year.
- Partnership working with EY providers and reception staff to develop a shared understanding and pathway to support parents and children transitioning to school
- Create and embed systems to monitor outcomes for children in early years settings to understand countywide and locality priorities.
- Design and model good practice and developmental activities which promote development, learning and inclusion.
- Promote the early identification of need and the development of holistic assessments and support plans for children - developing and supporting the delivery of clear processes and pathways to enable children and families to access support early.

The Early Years Sufficiency and Business Support Team

The main purpose of the team is to ensure there is sufficient high quality and sustainable Early Years and out of school childcare provision for children across the county, working with a wide range of stakeholders across the maintained, private, voluntary, and independent sector to:

- Support the growth of the early year's and out of school childcare market, engaging new providers and offering professional advice, guidance, and support.
- Secure early years funding contributions from developers to meet demand for childcare places in Gloucestershire linked to housing development.
- Ensure that priorities reflect national initiatives and are effectively implemented e.g., delivery of the expanding 2, 3 and 4-year funded childcare offers.

- Provide regular returns to the Department for Education on Gloucestershire's early year's provision and capacity.
- Develop information, stakeholder engagement plans and training materials for providers to build their capacity, skills, and knowledge.
- Maintain effective analysis of early year's outcomes to target those providers who are likely to require more intensive support and prioritise workload accordingly.
- Provide expert and responsive information, advice, guidance, and support to early years providers on local and business needs.

Early Years Finance team

- Ensure there are effective and efficient systems in place to provide timely payments to providers for state funded places.
- Process and administer funding, grants and contracts to providers of Early Years Education and Childcare, accurately recording child placement and setting details and process payments within published time scales.
- Audit funding claims submitted by providers of Early Years Education and Childcare to ensure that public funding is being used correctly.
- Monitor information received from Ofsted regarding new and closed Early Years provision in Gloucestershire.
- Provide information, advice and guidance to families and other agencies to help them access the support they need regarding childcare costs.

Early Years Development Officer

This officer supports work to ensure that our most vulnerable children (pre-birth to 3) have access to universal and targeted provision within their communities. This includes mapping existing universal and targeted provision across the county, providing training, support and resources to groups to ensure the delivery of effective universal provision for our most

vulnerable children/families. Where gaps in provision to support vulnerable families are identified, the Development Officer works with the PVI (Private, Voluntary & Independent) sector to establish and support community parent/baby/toddler groups. The Development Officer is currently working with Children and Family Centre providers and partners to develop a countywide Best Start offer for young families, delivered through the developing Family Hub approach. They are also developing the Virtual Family Hub content for the Start for Life section. The Development Officer also supports the implementation and management of a range of Government funded projects and programmes across the Early Years sector aimed at enhancing inclusive practice and promoting opportunities to identify and support children with additional needs.

This is a new team introduced, for a 2-year period, to implement the wraparound childcare element of the 2023 Childcare Reforms. This comprises of a Programme Lead and 2 childcare support officers.

EYFS Quality and Improvement (in schools)

The primary focus of this role is to lead and oversee the delivery of statutory duties of the LA for school improvement and education provision in relation to EYFS to improve outcomes for young children.

Key functions include:

- Supporting the improvement in EYFS phase of allocated schools of concern and ensure that schools are supported to implement strategies and practice that deliver improved quality.
- Assess the impact of intervention and commission corrective action where necessary in consultation with the Education Leads.

- In partnership with Public Health commissioners, lead the development and support the implementation of “school readiness” and transition guidance for EY settings and schools.
- Lead the implementation of the specific areas of the High Needs action plan to address areas of concern.
- Conduct robust and accurate analyses of all available data and intelligence to identify areas of concern in relation to EYFS.
- Ensure effective communication and reporting for Head teachers, governors, parents, Education Leads, Heads of Service and Directors.
- Ensure that there is a range of additional provision/resource available to support early learning outcomes in schools.
- Identify and disseminate best practice in effective intervention for young children.

What is a Childcare Sufficiency Duty Report?



Childcare Sufficiency Duty Reports are a statutory duty for local authorities under the Childcare Act (2006). A Childcare Sufficiency Duty report aims to provide an assessment of childcare provision for children aged 0-14 years old (and up to 18 years old for children with SEND) to meet the needs of working parents and those studying or training for work.

Statutory Duty

'Childcare plays a crucial role in the lives of most families. It enables parents to go out to work to contribute to a decent family income when they have very young children. A growing body of evidence shows that good pre-school childcare gives children a flying start and leads to better outcomes as they move through school. It also allows older children to take part in a wide range of interesting activities that fosters their personal development in a safe environment.'

(Securing Sufficient Childcare: Statutory guidance for local authorities in carrying out their childcare sufficiency duties (DCSF1, 2007)).

Working parents with children use many different forms of childcare with their choices dependent on factors that include family income, employment patterns, parental preferences, childcare availability, and the age of their children. Some families rely on informal (unregulated) childcare, for example grandparents, older siblings, other relatives, friends, and neighbours.

The Nursery Education Grant was introduced to allow children to access early education or childcare for free. Over time, the number of hours that can be accessed has increased, along with the lowering of the age range of children that can access this funding. In Gloucestershire this is now called Funded Early Education.



As a result, the need for childcare places has increased. To address this increase, the Childcare Act 2006, Section 6 placed statutory duties on all local authorities in England and Wales to secure sufficient childcare for working parents and those undertaking training with the intention of returning to work for children aged 0 -14 or up to 18 for children with SEN. Local Authorities are required to undertake a detailed assessment of the supply of, and demand for, childcare in their area.

What is childcare?

There are two forms of childcare - early years provision or later years provision. Childcare is defined in Section 18 of the Childcare Act 2006, as 'any form of care for a child' including 'education and any other supervised activity'.

Childcare does not include:

- education (or any other supervised activities) provided by a school during school hours unless that pupil has not yet started Key Stage 1.
- care provided by a parent, step- parent or person with parental responsibility, any relative or foster parent (local authority or private).
- care provided by a children's home, a care home, a hospital, a residential family centre, a young offenders' institution, a secure training centre or a secure college.

Early years provision is defined in Section 20 of the Childcare Act 2006, as 'the provision of childcare for a young child beginning with their birth and ending immediately before the 1st of September next following the date on which he attains the age of 5'.

Later years provision is defined as 'the provision of childcare for a child from the 1st of September following the child's 5th birthday until the age of 18 years'.

Early years and funded early education.

Early education has been seen as important for children's development since the early 1990's when free early education was first introduced.

Research continues to reflect the impact good quality early education can have for children. Early years provision offers far more than childcare to enable parents to work but is key element in children being successful at school and in later life.

Early year's provision has a hugely positive impact on children from disadvantaged backgrounds giving them access to resources and experiences they might not have at home. Good quality early years provision can reduce the gap in development for children and ensure all children start school reaching a good level of development.



Studies have shown that many children from impoverished backgrounds may not have access to books and hear less vocabulary than children from more financially well-off backgrounds. Therefore, the pupil premium was introduced and the two-year funding to close the gaps and ensure all children have the access to the early education, skills, and resources they need.

Eligible families with 2-year-olds may be entitled to 570 hours of free early education or childcare each academic year. This can be taken as 15 hours per week over 38 weeks or 570 hours per year that can be used flexibly with one or more childcare providers and 'stretched' over a maximum of 50 weeks.

All 3- and 4-year-olds in England are entitled to 570 hours of free early education or childcare (universal) each academic year. This can be taken as 15 hours per week over 38 weeks or 570 hours per year that can be used flexibly with one or more childcare provider and 'stretched' over a maximum of 50 weeks.

Working eligible families with 3- and 4-year-olds may also be entitled to a further 570 hours of free early education (extended). This can be taken as 30 hours per week over 38 weeks or 1140 hours per year that can be used flexibly with one or more childcare provider and 'stretched' over a maximum of 50 weeks. Not all early year's providers offer stretched funding as an option.

Early Years regulatory framework

It is evident that good quality early years provision has a significant impact on children's social, emotional, and cognitive development and is a key factor in improving outcomes for children and families. It narrows the gap between the highest and lowest performers and gives all children the positive start to play and learn that they need.

Good quality early years providers have a secure working knowledge of the Early Years Foundation Stage Framework (EYFS) and how it should be implemented in practice, as well as continuous self-evaluation.

The EYFS set standards for the learning, development, and care of children from birth to 5 years old. Children are defined as having reached a good level of development at the end of the EYFS if they have achieved at least the expected level in the early learning goals in the prime areas of learning (personal, social, and emotional development, physical development, and communication and language). All schools, Ofsted registered early years providers and Childminders registered with a Childminder Agency must follow the EYFS.

Ofsted inspect and regulate services that care for children and young people, and services providing education and skills for learners of all ages. The Childcare Act 2006 gives Her Majesty's Chief Inspector of Education, Children's Services and Skills (HMIC) responsibility for regulating registered childcare providers. Childminders can choose to register with an Ofsted approved Childminder Agency rather than

register as an individual provider with Ofsted. Childminders can also choose to work in their own home or in the home of another registered childminder, they also have the option to operate for 50% of their time from a non-domestic premises however Ofsted approval would be required.

Registration on the Early Years Register is compulsory for providers who care for children in the early years age group, from birth to compulsory school age. The Childcare Register is for providers who care for children from birth to 18 years. It has two parts:

- A Compulsory part, for providers who care for children aged from the end of the Foundation Stage up to seven years.
- A Voluntary part, for providers who care for children aged eight and over and those providing care for children at any age for whom registration is not compulsory, e.g., nannies.

The judgements which can be given are: Outstanding, Good, Requires Improvement or Inadequate.

Where there are no children on roll, Ofsted will make a judgement only on the 'overall quality and standards of the early year's provision' with one of the three outcomes: Met, Not Met with actions or Not Met with enforcements.

For early years providers registered on the Childcare Register, Ofsted will make a judgement of two outcomes: Compliant or Non-Compliant. Once a provider has registered on the Early Years or Childcare Register, they can start to offer childcare.



Ofsted.

Ofsted will carry out their first inspection within 30 months of registration; therefore, a judgement of Awaiting Inspection is recorded against the early year's provision until their first graded inspection outcome is received from

From May 2015, legislation changed for schools, enabling them to lower the age of entry to two years. This is if the school and governing body feel there are sufficient requirements and capacity within the school to accommodate this increase in pupil numbers. Therefore, a judgement for any early years provision will fall under the schools Ofsted. We currently have no maintained Early Years provision in Gloucestershire. We do however have some Early Years provision in schools which operate under the Section 27 Community Powers model - the school governing body oversee management of the provision; it is inspected under the school's Ofsted inspection however must remain financially independent of the school.

Types of childcare



There are many different childcare types operating within Gloucestershire:

- Childminder - these are registered self-employed childcare professionals who work in their own homes. They are registered for small numbers of children and will often care for a range of ages. Childminders may also offer flexibility to accommodate parents working patterns e.g., evening and weekends. Childminders can choose to register independently with Ofsted or register as part of a Childminder Agency.
- Day Nursery - these often care for children aged 3 months to 5 years and are predominately open from 8.00am to 6.00pm. Most are open from Monday to Friday, but a few may open at weekends to help

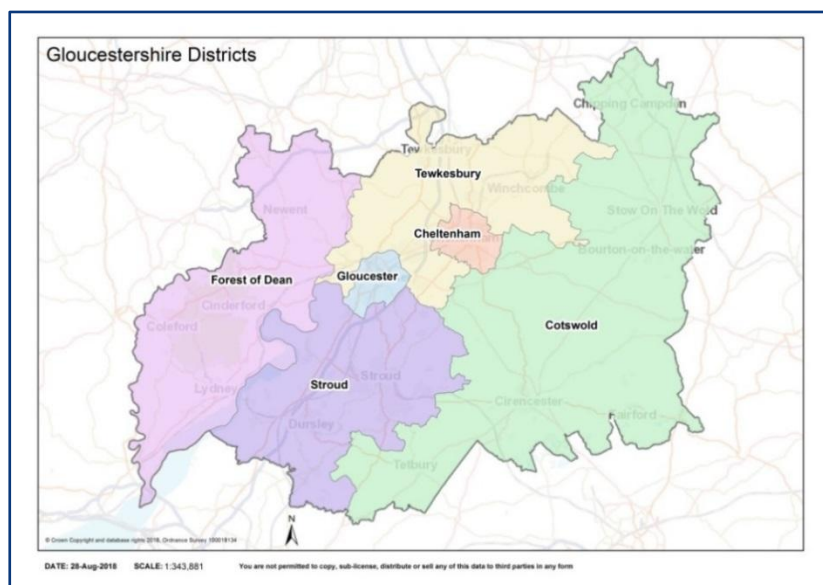
support parents' different working patterns. Day nurseries operate all year round, usually except for bank holidays. Most offer the free early education places that are available to 2-, 3- and 4-year-olds.

- Pre-school playgroups - these often care for children between 2 and 5 years. Pre-schools and playgroups tend to run term time only, from around 9am to lunchtime or from lunchtime to around 3 or 4 pm, depending on the sessions they operate.
- Home carers - home carers are usually nannies who care for children of any age up to their 18th birthday wholly or mainly in the child's own home, and care for children from no more than two families. They are not required to register with Ofsted but may choose to do so, on the voluntary part of the Childcare Register.
- Out of school provision - these are often referred to as Breakfast or After School Clubs and operate before school in the mornings, from the end of the school day and at the end of the working day. Schools run the majority themselves.
- Holiday play schemes - take place during school holiday periods and may be run by a school, private or voluntary organisations. ^[OBJ]

Demographics

About Gloucestershire

Gloucestershire is a diverse county in the Southwest of England with a population of 659,276 (mid-year 2023 estimate). It is mainly rural, with two urban centres of Gloucester and Cheltenham at its heart. Nearly 40% of the county's population live in Gloucester and Cheltenham.



Gloucestershire's six districts population figures are as follows:

	Population 2023	Predicted Population 2028	Predicted Population 2043
Cheltenham	120,255	119,209	124,127
Cotswolds	91,490	101,499	112,907
Forest	89,104	93,754	101,222
Gloucester	134,991	134,686	142,757
Stroud	124,540	126,882	136,363
Tewkesbury	98,896	107,819	121,106
Gloucestershire	659,276	683,849	738,482

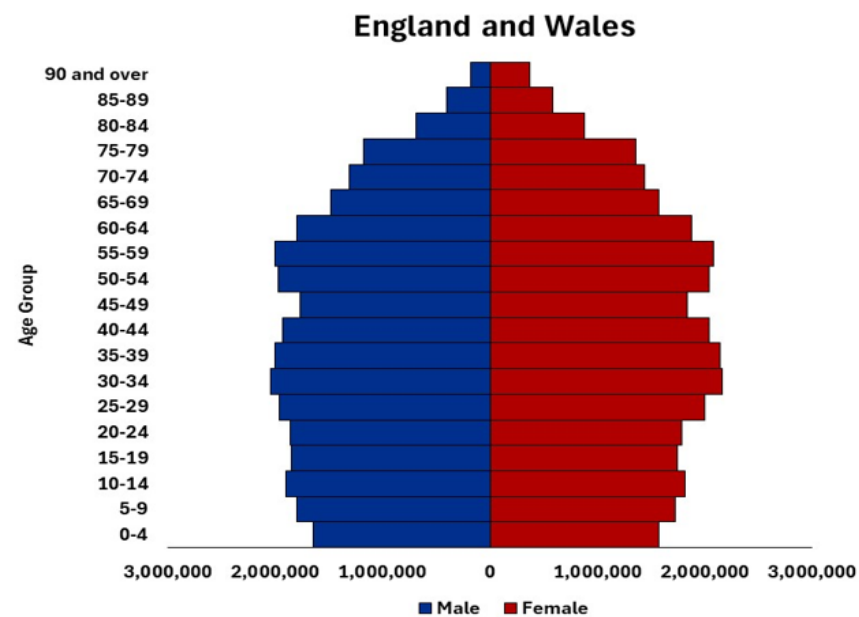
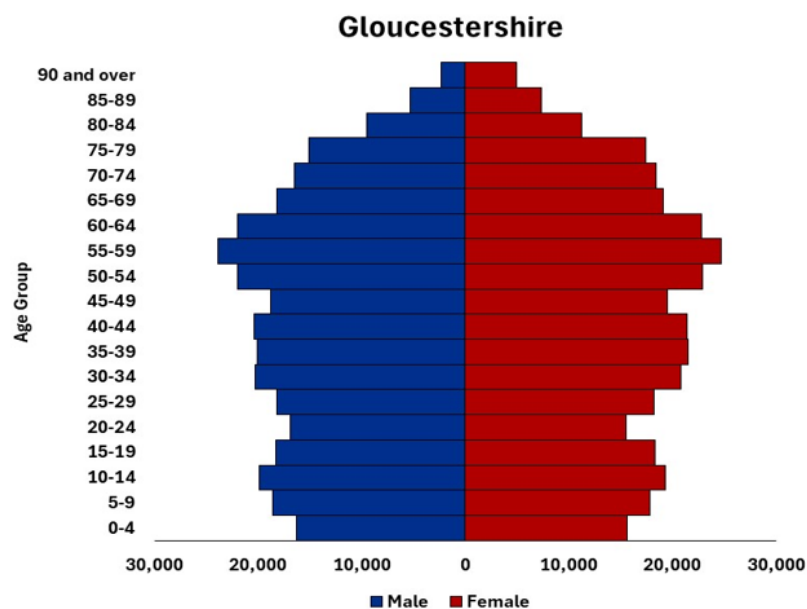
Population Composition of Gloucestershire and its Districts by Broad Age Groups

Age Group	0-15	16-64	65+
Gloucestershire	115,485	398,322	145,469
Cheltenham	20,924	75,665	23,666
Cotswold	14,598	52,221	24,671
Forest of Dean	14,185	52,350	22,569
Gloucester	26,067	85,942	22,982
Stroud	21,313	73,789	29,438
Tewkesbury	18,398	58,355	22,143
Southwest	974,529	3,517,853	1,318,877
England and Wales	11,196,865	38,192,539	11,465,323

The proportion of the population who are of working-age (16-64) is 60.4% in Gloucestershire. This is lower than the overall working-age proportion in England and Wales (62.8%) and slightly lower than in the Southwest (60.5%).

England and Wales population pyramid Mid 2023

Gloucestershire's population pyramid Mid 2023

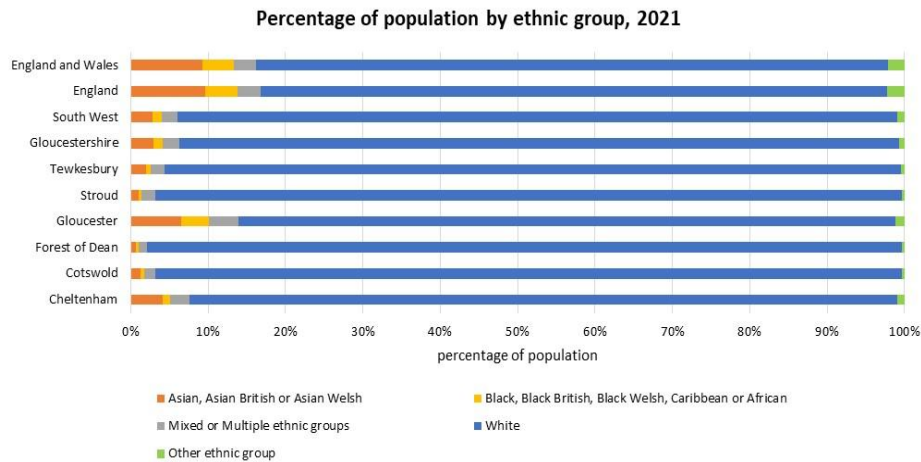


Characteristics of current population

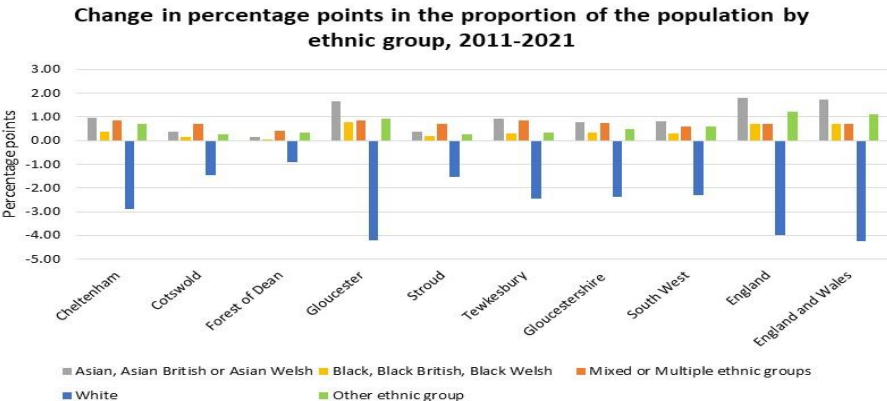
In 2021 93.1% (600,314 people) of Gloucestershire’s population identified as “White”. Gloucestershire was less diverse than the national average, with 81.7% of residents across England and Wales identifying as “White,” however it was in line with the regional average where 93.1% of residents identified as “White.” All districts in Gloucestershire had a higher proportion of residents identifying as “White” than nationally.

"Asian, Asian British or Asian Welsh" accounted for the second largest proportion of Gloucestershire’s population at 2.9%. This group was also the second largest group at a national and regional level, although it accounted for a larger proportion nationally (9.3%) than in Gloucestershire, which is unsurprising given the high proportion of Gloucestershire’s population who identify as “White.”

The third largest ethnic group in Gloucestershire was “Mixed or Multiple ethnic groups,” this differs from the picture seen at a national level where “Black, Black British, Black Welsh, Caribbean or African” accounted for the third largest proportion of the population.

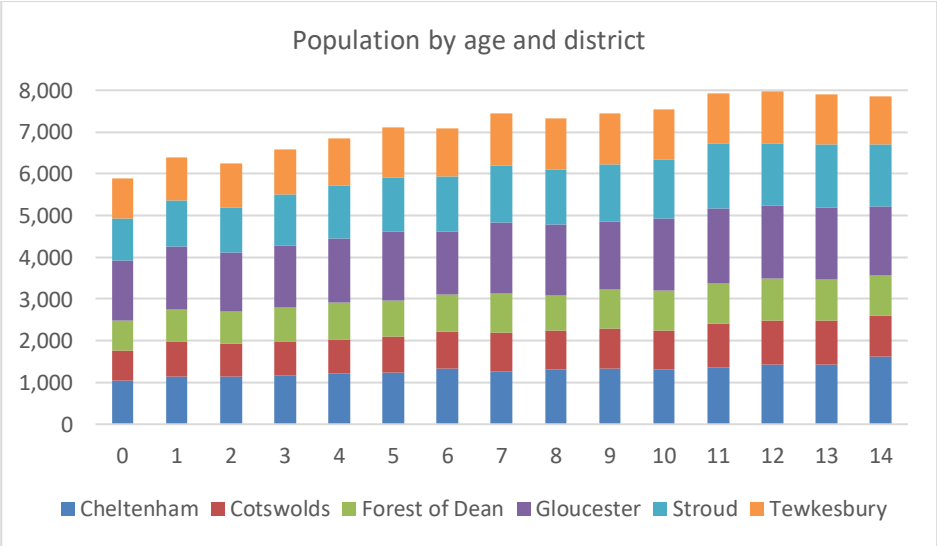


Since 2011 Gloucestershire has become more diverse, with the proportion of people identifying as “White” falling from 95.4% in 2011 to 93.1% in 2021, conversely all other ethnic groups have seen growth during the same period.



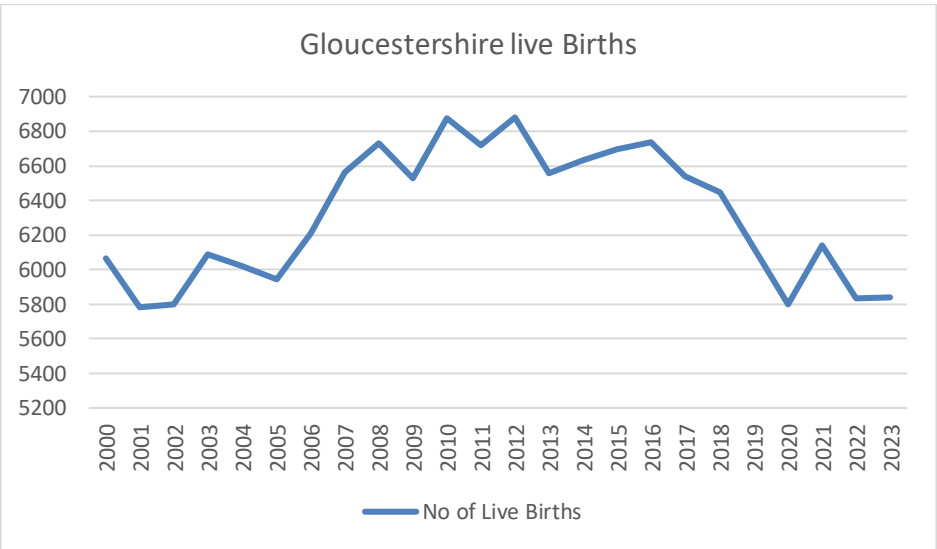
Children and Young People

In total, there are 31,959 children under the age of five, 51,890 children aged 5-11, and 23,732 children aged 12-14 living in our local authority (*source: mid-year 2023 estimate*). These children may require either early year's childcare or later year's childcare: before and after school, and/or during the school holidays.



The key factors likely to have the greatest influence on managing school places across the county over the next 5 years include the birth rate, housing development, home education, internal and overseas migration and the presence of the Armed Services in Gloucestershire.

Birth rate in Gloucestershire



(Source: ONS (Office for National Statistics) Live births)

In 2022, there were 5,834 live births in Gloucestershire, a decrease of 304 from 2021. Between 1991 and 2001 there was a broadly decreasing trend in the number of live births taking place in Gloucestershire. There was then an increasing trend in the number of births peaking at 6,880 before dipping in 2013. From 2016 to 2020, the number of babies born decreased year on year until the increase in 2021.

Projected population figures

The projected population figures for Gloucestershire over the next 10 years are listed. The figures show a steady increase in the number of births from 6,510 in 2025 to 6,776 in 2034.

	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
0 yrs.	6,510	6,530	6,545	6,563	6,582	6,610	6,643	6,681	6,726	6,776
1 yr.	6,574	6,598	6,616	6,632	6,650	6,670	6,698	6,729	6,768	6,814
2 yrs.	6,671	6,689	6,711	6,729	6,745	6,764	6,785	6,811	6,843	6,882
3 yrs.	6,754	6,781	6,797	6,821	6,840	6,855	6,872	6,892	6,920	6,952
4 yrs.	6,861	6,838	6,867	6,883	6,906	6,926	6,939	6,958	6,978	7,005
5 yrs.	6,961	6,963	6,941	6,966	6,983	7,005	7,025	7,040	7,059	7,079
6 yrs.	6,999	7,058	7,060	7,036	7,061	7,079	7,101	7,121	7,133	7,154
7 yrs.	7,314	7,077	7,134	7,134	7,111	7,136	7,154	7,176	7,194	7,210
8 yrs.	7,363	7,378	7,141	7,198	7,199	7,174	7,198	7,216	7,239	7,257
9 yrs.	7,767	7,450	7,458	7,220	7,278	7,278	7,252	7,276	7,293	7,315
10 yrs.	7,711	7,831	7,514	7,520	7,280	7,338	7,337	7,312	7,335	7,352
11 yrs.	7,886	7,796	7,915	7,600	7,601	7,361	7,418	7,416	7,390	7,413
12 yrs.	7,966	7,980	7,892	8,009	7,694	7,691	7,451	7,506	7,504	7,478
13 yrs.	8,295	8,058	8,067	7,980	8,096	7,782	7,775	7,533	7,590	7,586
14 yrs.	8,175	8,419	8,179	8,180	8,096	8,208	7,895	7,881	7,640	7,695

Deprivation

The Indices of Deprivation 2019 provide a set of relative measures of deprivation for small areas (Lower Super Output Areas) across England, based on seven domains of deprivation.

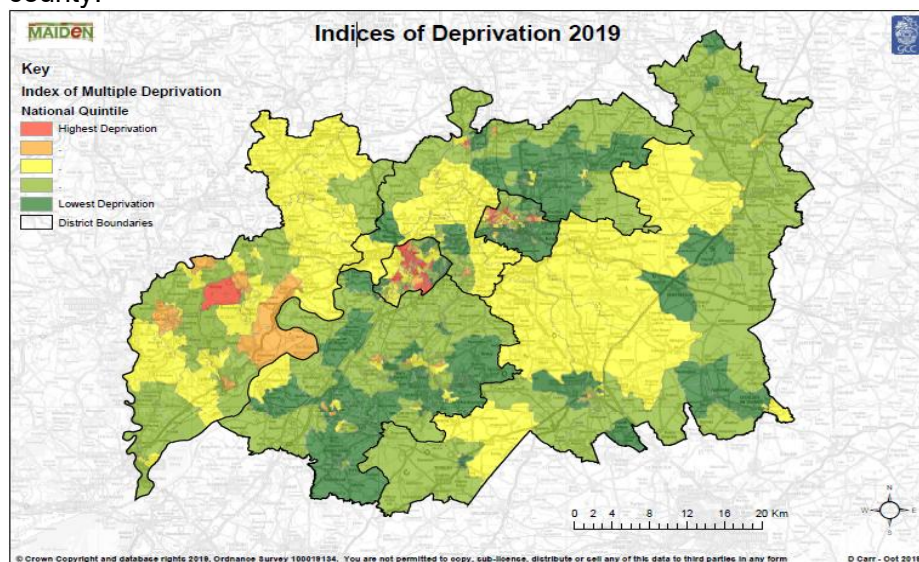
The domains were combined using the following weights to produce the overall Index of Multiple Deprivation: Income Deprivation (22.5%), Employment Deprivation (22.5%), Education, Skills, and Training Deprivation (13.5%), Health Deprivation and Disability (13.5%), Crime (9.3%), Barriers to Housing and Services (9.3%), Living Environment Deprivation (9.3%).

An average IMD rank for each of the six districts in Gloucestershire shows that even the most deprived districts (Gloucester and Forest of Dean) fall in the middle quintile (middle 20%) for deprivation out of 317 English authorities. Tewkesbury, Cotswold, and Stroud districts are in the least deprived quintile, with Cheltenham in the second least deprived quintile.

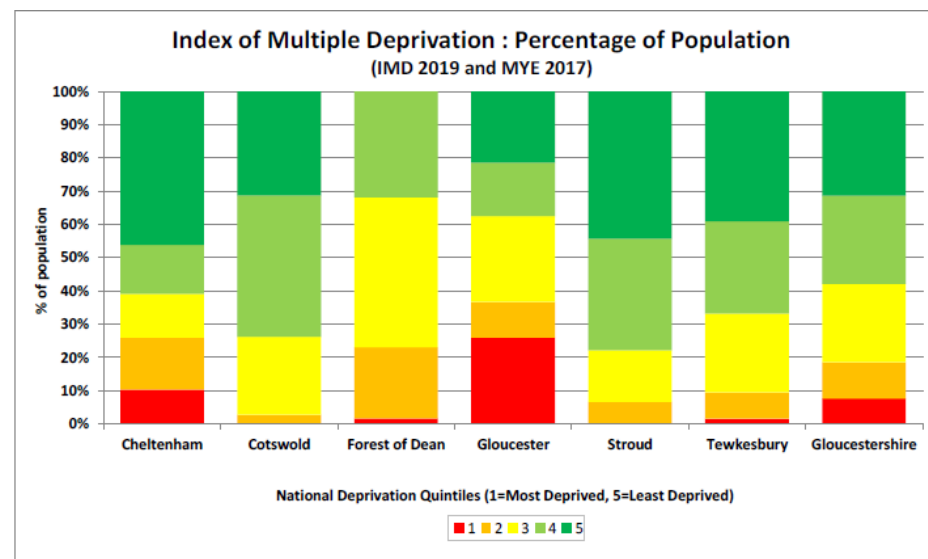
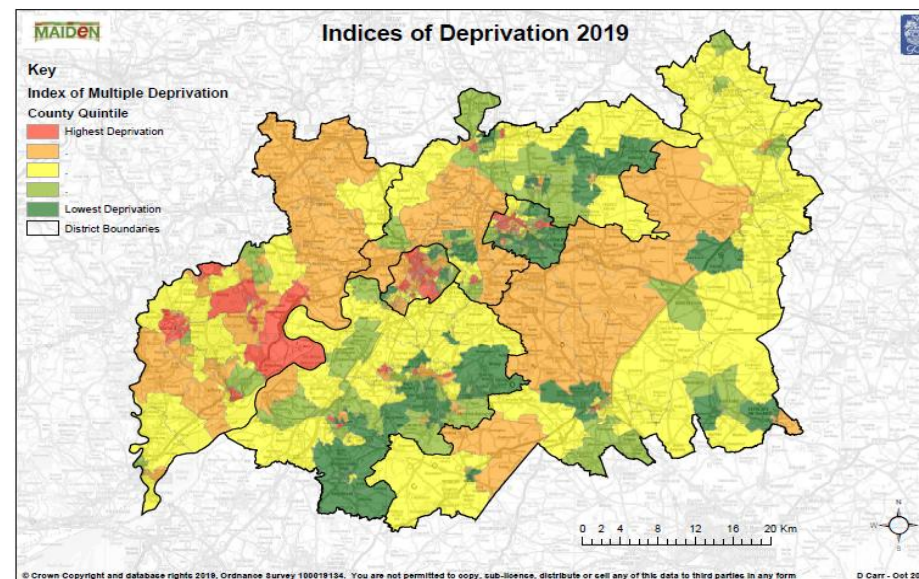
	Ranking in Gloucestershire (1 being most deprived)	Ranking in England (out of 317 districts, 1 being most deprived)	Quintile (Q1 being most deprived)
Cheltenham	3	237	Q4
Cotswold	5	272	Q5
Forest of Dean	2	143	Q3
Gloucester	1	138	Q3
Stroud	6	279	Q5
Tewkesbury	4	261	Q5

(source: Indices of Deprivation 2019 Gloucestershire, Strategic Needs analysis Team, GCC)

Looking at the 151 upper-tier authorities, Gloucestershire has a rank of 126, putting it in the least deprived quintile for overall deprivation. While there are certainly areas of deprivation in the county in comparison to the rest of England, overall Gloucestershire is not a very deprived county.



In terms of numbers of people living in deprived areas, the following chart shows the proportion of the population in each deprivation quintile for Gloucestershire and each of the six districts in the county.



Gloucestershire economy and the labour market

Gloucestershire has a prosperous and resilient economy set within a highly attractive natural environment, which offers a high standard of living for residents. The county is predominantly rural with two urban centres that serve as the main business and commercial heartland. The urban settlements are complemented by vibrant market towns that function as valuable employment hubs and key providers of services. The development of the county has been strongly influenced by connectivity to the Midlands and Southwest via the M5 corridor and to London and the Southeast via the M4 corridor.

There are 28,860 businesses in Gloucestershire, creating 295,000 employee jobs and a workforce of 338,600. (Employee jobs excludes self-employed, government-supported trainees and HM Forces)

The Armed Forces have some light presence, particularly in South Cerney, Fairford and Innsworth. Currently there are around 2330 serving military personnel, including 380 civilians, based in the county.

During the period Jan 2024 to December 2024, Gloucestershire had an economic activity rate of 82.5%, which is above the Southwest and Great Britain figure of 81.0% and 78.6% respectively

Below is a summary of the number and percentage of adults in Gloucestershire who are either in employment or unemployed – Jan 2024-Dec 2024.

	Gloucestershire		Southwest	Great Britain
	All People			
Economically active†	338,600	82.5	81.0	78.6
In employment†	330,300	80.3	78.6	75.5
Employees†	278,200	69.2	66.8	66.0
Self-employed†	49,900	10.8	11.4	9.3
Unemployed§	8,300	2.4	3.0	3.8
Males				
Economically active†	178,500	86.3	83.5	82.1
In employment†	175,600	84.8	80.8	78.8
Employees†	143,900	72.3	66.1	66.5
Self-employed†	30,300	12.5	14.4	12.1
Unemployed§	#	#	3.2	4.0
Females				
Economically active†	160,200	78.7	78.7	75.0
In employment†	154,800	75.9	76.4	72.3
Employees†	134,200	66.2	67.6	65.5
Self-employed†	19,600	9.2	8.5	6.6
Unemployed§	#	#	2.9	3.6

- sample size too small for reliable estimate

† - numbers are for those aged 16 and over, % are for those aged 16-64

§ - numbers and % are for those aged 16 and over. % is a proportion of economically active

(Source: nomis - official labour market statistics)

Future housing developments

Gloucestershire County Council receives information from the six district councils about expected levels of new housing through the annual housing audit and local core strategies.

Pupil yield rates (the expected number of pupils from new housebuilding) are informed by commissioned research. From April 2024, the additional educational provision requirement for each 100 dwellings is forecast to be:

30 Pre-school children
30 primary school children
14.7 secondary school children (11-15)
5 post 16 children (16-18)

The Joint Core Strategy supporting Cheltenham, Gloucester, and Tewkesbury districts along with the individual local plans of the three other districts of Stroud, Cotswolds and Forest of Dean sets out the housing totals and phasing for each community area. The density of housing development varies across the county as outlined in the table below.

Following adoption of the Joint Core Strategy (JCS), the districts are working on a Strategic and Local Plan (SLP), which will replace the JCS. Draft site assessments for the SLP were published in December 2023, but these have not been adopted yet. The latest adopted data from the JCS in relation to expected additional provision requirements is:

	Number of Houses
Lydney	1,900
Coleford	650
Rest of Forest of Dean across 6 sites	827
Cinderford / Ruspidge Northern Quarter	1,050
Innsworth / Twigworth	2,295
South Churchdown	1,100

North Brockworth (Perry Brook)	1,500
Northwest Cheltenham (Elms Park)	4,285
West Cheltenham	1,100
Winnycroft	620
Leckhampton (Farm Lane)	377
Stroud Gloucester Fringe (Hunts Grove)	2,500
West of Stonehouse	1,350
Berkeley	300
Northeast Cam	450
Stroud Valley across 7 sites	450
Chesterton	2,350
Moreton-in-Marsh	400
Bourton-on-the-Water	300
Fairford across 5 sites	400
Mickleton across 3 sites	200
Rissington	368
TOTALS	24,772

The scale of the programme of work required to provide additional school places for the houses identified above should not be underestimated 24,772 (approx. 21,000 yet to be built) dwellings across the county represents an additional requirement for approx. 7,400 primary and 3,600 11-15 places and 1,200 post 16 places secondary places across Gloucestershire in the period from 2006 to 2031 based on current pupil product ratios.

In addition, the council is aware of other large developments that could come forward which are not in the current local plans, whilst these may or may not come to fruition the information we have, should they happen, will help us to make more strategic decisions around securing land, ensuring Gloucestershire County Council owned land is kept available and looking at future proofing new schools by ensuring the site size is sufficient for the school to expand in the future. We are also in early discussions with the City Council regarding the impact of two potential and significant regeneration projects in the city. All four local plans are at various stages, the JCS has recently been adopted which

covers three county districts, Stroud's Local Plan has just been updated, as has the Cotswolds Plan with the Forest of Dean plan adopted in 2012.

Early Years Foundation Stage Profile (EYFSP) Results 2023-2024

	National	Gloucestershire
Good level of development for girls and boys	67.7% of pupils achieved a good level of development (GLD). An increase of 0.5% from 2023.	68.2% of pupils achieved a good level of development (GLD). An increase of 0.4% from 2023.
Gender attainment gap	Girls outperformed boys with the attainment gap at 14.3%. An increase of 0.7% from 2023.	Girls outperformed boys with the attainment gap at 11.6%. A decrease of 0.8% from 2023.
Good level of development for children in receipt of Free Schools Meals (FSM)	51.5% of pupils eligible for free school meals (FSM) achieved a GLD. A decrease of 0.1% from 2023.	51.0% of pupils eligible for free school meals (FSM) achieved a GLD. An increase of 2.2% from 2023.
FSM attainment gap (FSM / non-FSM)	The FSM attainment gap is 20.5%. An increase of 0.6% from 2023.	The FSM attainment gap is 19.9%. A decrease of 3.5% from 2023.

Good level for development for SEN children	For pupils with SEN support, 24.9% achieved a good level of development compared with 75.6% of those pupils with no identified SEN. An increase of 0.6% and 1.6%.	For pupils with SEN support, 25.0% achieved a good level of development compared with 75.9% of those pupils with no identified SEN. An increase of 3.3% and 1.8%.
SEN attainment gap	For pupils with SEN with an EHC plan, 3.8% achieved a good level of development, the same as in 2023.	For pupils with SEN with an EHC plan, 3.6% achieved a good level of development. A decrease of 1.6% from 2023.

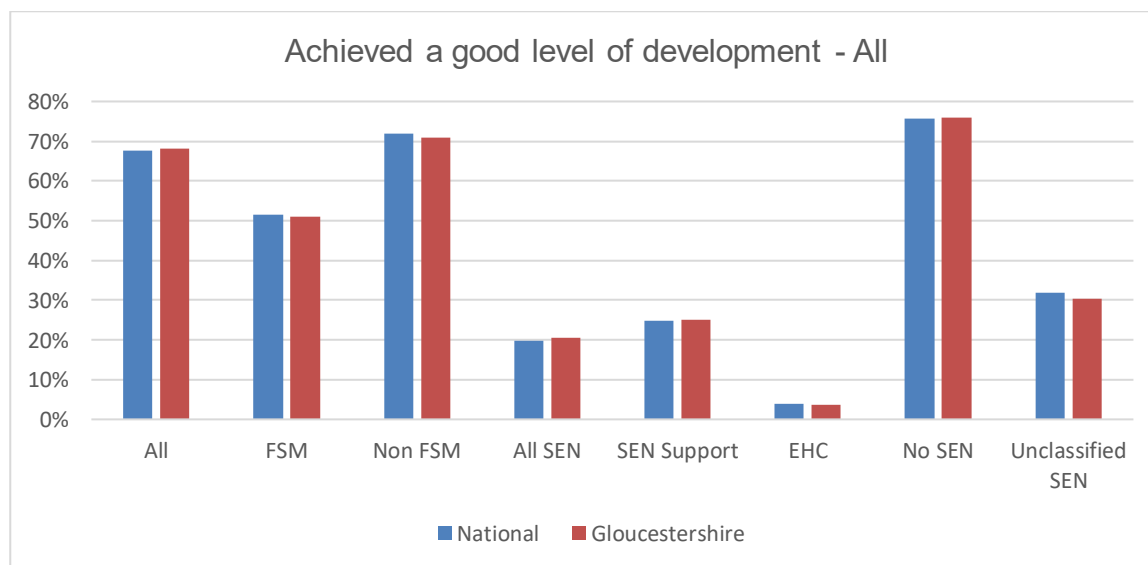
	National	Gloucestershire
Good level of development by ethnicity for girls and boys	All ethnicity groups achieved an increase in GLD apart from Black/Afr/Car/Black British.	White and Mixed/multiple ethnic groups achieved an increase in GLD.
Ethnicity attainment gap for girls and boys	Girls outperformed boys in all ethnicity groups. Black/Afr/Car/Black British has the biggest gap of 17.9% with Unclassified the smallest at 11.1%.	Girls outperformed boys in all ethnicity groups apart from other. Black/Afr/Car/Black British has the biggest gap of 22.5% with Other the smallest at 2.5%.
Ethnicity attainment gap for girls and boys compared to overall total	<p>White children's GLD remains above the national % with an attainment Gap increase of 0.3%.</p> <p>Mixed/multiple ethnic groups children's GLD remains above national % with an attainment Gap increase of 0.3%.</p> <p>Asian/Asian British children's GLD remains below the national % with an attainment Gap increase of 0.3%.</p>	<p>White children's GLD remains above Glos % with an attainment Gap increase of 0.9%.</p> <p>Mixed/multiple ethnic groups children's GLD remains above Glos % with an attainment Gap increase of 0.4%.</p> <p>Asian/Asian British children's GLD remains below Glos % with an attainment Gap increase of 4.7%.</p>

Black/Afr/Car/Black British children's GLD remains below the national % with an attainment Gap increase of 1.0%.	Black/Afr/Car/Black British children's GLD remains below Glos % with an attainment Gap increase of 6.0%.
Other children's GLD remains below the national % with an attainment Gap decrease of 0.6%.	Other children's GLD remains below Glos % with an attainment Gap increase of 7.8%.
Unclassified children's GLD remains below the national % with an attainment Gap increase of 0.1%.	Unclassified children's GLD remains below Glos % with an attainment Gap increase of 10.6%.

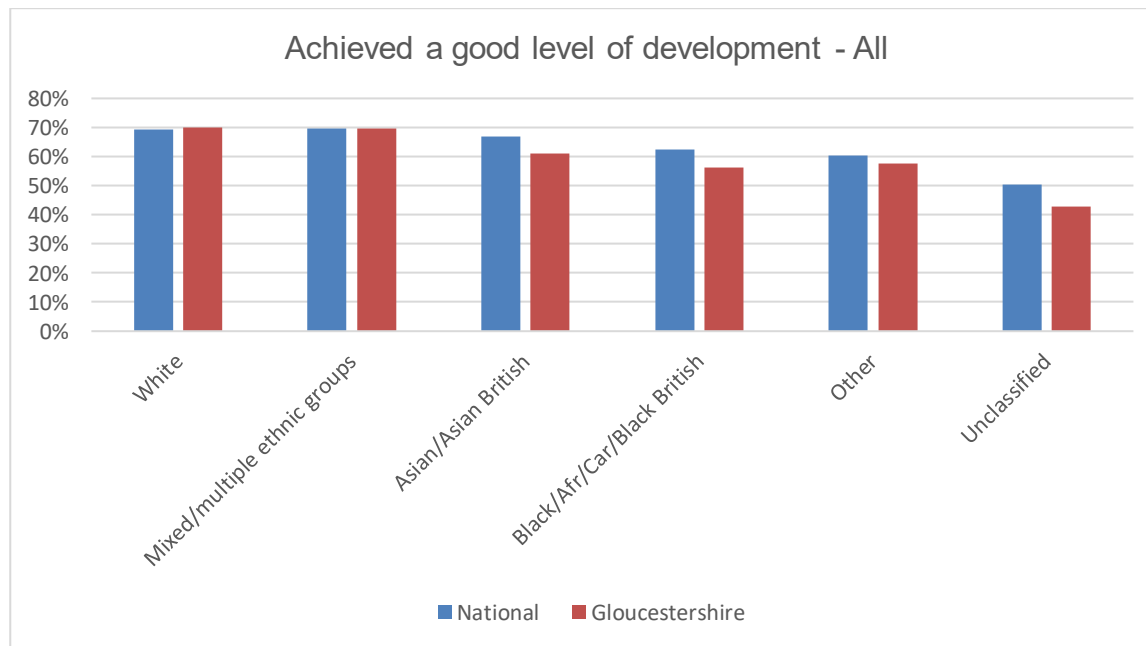
Achieving a good level of development

All Pupils

	All	FSM	Non-FSM	All SEN	SEN Support	EHC	No SEN	Unclassified SEN
National 24	67.7%	51.5%	72.0%	19.7%	24.9%	3.8%	75.6%	31.9%
National 23	67.2%	51.6%	71.5%	19.8%	24.3%	3.8%	74.0%	29.4%
National 22	65.2%	49.1%	69.5%	18.8%	22.9%	3.6%	70.9%	27.6%
Trend	↑	↓	↑	↓	↑	↔	↑	↑
Glos 24	68.2%	51.0%	70.9%	20.6%	25.0%	3.6%	75.9%	30.4%
Glos 23	67.8%	47.8%	71.2%	18.9%	21.7%	5.2%	74.1%	27.7%
Glos 22	67.4%	44.8%	70.5%	16.8%	20.5%	2.3%	72.9%	52.9%
Trend	↑	↑	↓	↑	↑	↓	↑	↑



	White	Mixed/multiple ethnic groups	Asian/Asian British	Black/Afr/Car/Black British	Other	Unclassified
National 24	69.2%	69.5%	66.9%	62.3%	60.2%	50.4%
National 23	68.6%	68.7%	66.7%	62.8%	59.1%	50.0%
National 22	66.3%	67.0%	64.9%	60.6%	55.3%	49.6%
Trend	↑	↑	↑	↓	↑	↑
Glos 24	69.9%	69.7%	61.2%	56.1%	57.6%	42.9%
Glos 23	68.6%	68.9%	65.5%	61.7%	70.6%	53.1%
Glos 22	68.3%	65.3%	66.3%	53.4%	54.8%	52.9%
Trend	↑	↑	↓	↓	↓	↓



Attainment GAP, Ethnicity GLD % compared to overall Glos/National totals

	White	Mixed/multiple ethnic groups	Asian/Asian British	Black/Afr/Car/Black British	Other	Unclassified
National 24	+1.5%	+1.8%	-0.8%	-5.4%	-7.5%	-17.3%
National 23	+1.4%	+1.5%	-0.5%	-4.4%	-8.1%	-17.2%
National 22	+1.1%	+1.8%	-0.3%	-4.6%	-9.9%	-15.6%
Trend	↑	↑	↑	↑	↓	↑
Glos 24	+1.7%	+1.5%	-7.0%	-12.1%	-10.6%	-25.3%
Glos 23	+0.8%	+1.1%	-2.3%	-6.1%	+2.8%	-14.7%
Glos 22	+0.9%	-2.1%	-1.1%	-14.0%	-12.6%	-14.5%
Trend	↑	↓	↑	↑	↑	↑

Supply of Childcare in Gloucestershire

There are currently 593 childcare settings across the county, providing 14,974 childcare places for children aged 0-5 years. These are made up of 248 childminders, 154-day nurseries, and 175 pre-schools, 15 Nursery units in independent schools, 1 creche.

We now have 294 providers that offer out of school care providing 5,852 places and 82 holiday settings providing 2215 places. Since the National Wraparound Childcare Programme started in April 2024, we have supported 45 schools and providers to expand/create new places totalling 1128 new places for children to access out of school provision

The Early Years sector remains fragile both locally and nationally. Over the past year, providers have continued to raise ongoing concerns in relation to the increases in financial pressures; increased delivery costs and recruitment and retention challenges continue to impact business sustainability.

The Early Years and Childcare Service has supported several providers through business advice and support, and where required with sufficiency funding, to mitigate risk of potential closure and subsequent loss of childcare places.

As the expanded entitlement has rolled out it has become even more essential that there is sufficient provision for babies and 2-year-olds and a workforce that is experienced with this age group.

Partnership working with Job Centre Plus (JCP) colleagues seek to encourage those looking for employment opportunities to consider opportunities to work in the childcare sector.

The Council's Communication team are developing a strategy to promote the National Childminder Recruitment Campaign. Our work with JCP has included presenting information to clients about the

funding that is available for childcare and how parents can access this. We are also working with JCP this July 2025, to present and support clients who may want to take up a career in early years and childcare. This includes explaining the different roles, qualifications and requirements for careers. In addition, we are working with JCP, Gloscol and Early Years providers to enable L2 apprentices to access placements and hopefully enter full time employment. This programme will start with approximately 5 to 10 clients initially and if successful will be expanded across the county.

As funded entitlement for working parent 2-year-olds has been introduced, there has been a reduction in the demand for "paid for" childcare places for children aged 2 years. This has impacted on providers' income from fee paying/private arrangements. This leads to a greater reliance on funded places at the potentially lower hourly rate, compared to rates charged for paid for/ private fee arrangements challenging the viability of some settings.

It is essential to ensure different models of delivery are available to offer choice and to match the needs of children and families, and vital that a variety of different models are available to meet the diverse needs of the families e.g. a sufficient number of childcare places may be available in a chosen area however if the places available only offer term time only provision this will not support families who work all year round. This is presenting challenges to some Early Years providers who historically have only offered a restricted model.

Homebased childcare provided by registered childminders and group-based childcare have equal value and different things to offer. Parents and families, partners and stakeholders, and parent-facing professionals, all need to understand the facts about early years childcare provision, and key information about the different things each type of provider can offer.

It is important that each part of the early years and childcare sector is held in equal regard and supports families to make informed and appropriate choices around what is best for them and their children.

The decrease in numbers of registered childminders in Gloucestershire is significant with a drop of 40% (165) of the childminder workforce since May 2019. - Since May 2024 there has been a decrease of 7 (2.7%) childminders. Exit interviews were carried with childminders leaving the sector, reasons given for closures included, retirement, alternative employment in an Early Years setting or a school, pursue alternative career not connected to childcare (largely retail) and personal reasons including 'wanting their house back', more job security, higher salary, pressure of Ofsted inspections, demands of the job and not feeling valued. Many childminders who reduced the number of places offered during the pandemic have continued to offer reduced places reporting the emphasis on work life balance.

By comparison, the decrease in the numbers of day care providers since May 2019 is (32) 8.5%. Since March 2024 there has been a decrease of 9 (2.5%)-day care providers. These closures coupled with the crisis in recruitment and retention of staff across the Early Years workforce forcing some local childcare providers to reduce the number of childcare places offered, is impacting on the number of childcare places available. The usually well-resourced agencies with qualified early years childcare staff, offering supply cover, continue to report dwindling numbers of agency workers, which presents a further pressure for providers. Those providers who can access agency staff to support delivery, report the financial impact this is having on business sustainability as this can be an expensive option. This situation in Gloucestershire mirrors the national picture.

Some voluntary managed preschools have closed due to being unable to recruit Committee members to support the provision. For some vulnerable Committee run provision closure has been avoided through amalgamation with a local school to operate under the S27 Community

powers model, with the school governing body becoming the management committee. This is now presenting several challenges due to the enhanced staffing costs associated with many staff transferring to Green Book Terms and conditions. This has resulted in an increase in requests for business support by schools with Early Years provision operating in a deficit situation and requests for additional sufficiency funding to support ongoing delivery of childcare places for Early Years.

The Sufficiency / Business support team continue to collaborate closely with providers supporting risk analysis and providing information advice and guidance to support providers to adapt business models to ensure services meet parental demand and offer future sustainability.

The increased demand for business support is evident, subsequently additional business support officers have been recruited. The expansion of funded entitlement has impacted on the Council's Ey finance team, with an increase of 25% in the number of claims submitted for administration over the past year.

The LA business support offered does not guarantee provision will remain open, however does enable the providers to have open discussions with experienced business professionals who will support them to make informed decisions regarding their business options. The Business support team have recently carried out several provider events to Early Years and Childcare providers across all localities in Gloucestershire. These were an opportunity for Early years providers to meet the team and engage in some dialogue about the expanded Entitlements roll out and support available for the delivery including an opportunity to receive practical information to support with the changes business models and the funding claims process.

Following feedback from the recent Expanded Entitlements provider events, the Business support team have introduced weekly 'Business News Tuesday' updates for Early Years and Childcare Providers and monthly virtual business network meetings. Initial feedback is extremely positive and gives the sector an opportunity to share good practice,

access information from the team and supports the team's engagement with the sector to gather critical local intelligence. This in turn will enable us to identify bespoke resources required and understand common themes across the diverse sector and will support us in planning mechanism e.g. training packages to support with these challenges.

Number of Early Years Providers and places

For private, voluntary, and independent nurseries and childminders, the number of registered places represents the maximum number of children who can be on the premises at any given time.

In practice, many providers choose to operate below their number of registered places.

Children may attend childcare full time or part time. The table records places for children who are attending full time, or for as many hours as the setting is open. In some cases, two or more children attending part time may use one full time equivalent place. For example, one child may attend in the morning, and one child may attend in the afternoon.

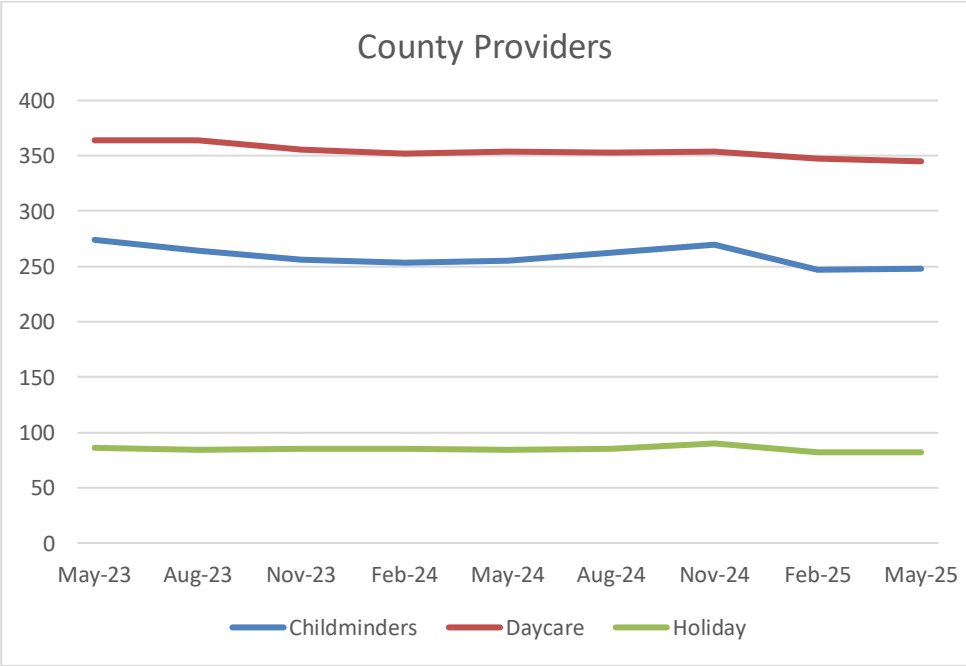
	No of providers	% Of Providers	No of registered places
Childminders	248	26%	1685
Day Nursery (non gov run)	146	15%	7763
Day Nursery (gov run)	5	1%	104
Day Nursery (academy trust gov run)	3	0%	60
Pre-School Playgroup (non gov run)	106	11%	3034
Pre-School Playgroup (gov run)	41	4%	941
Pre-School Playgroup (academy trust gov run)	28	3%	779
Nursery Unit of Independent Schools	15	2%	652
Creche	1	0%	26
Out of school (non gov run)	121	12%	3119
Out of School (gov run)	108	11%	1625
Out of School (academy trust gov run)	65	7%	1108
Holiday (non gov run)	75	8%	1999
Holiday (gov run)	4	0%	128
Holiday (academy trust gov run)	3	0%	88

Change in providers and places since last sufficiency report

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there has been a 2.6% (16) decrease in the number of early years providers and a 0.8% (118) decrease in the overall number of places. For Holiday providers there has been a 2.4% (2) decrease in the number of providers and a 9.1% (222) decrease in places. Through the National Wraparound Childcare Programme, the Local Authority has supported 51 schools to expand or create new 1128 places for primary school aged children to access care from 8am to 6pm during term time which will be up and running from September 2025. In addition, a further 65 wraparound providers have been identified who are going to be contacted to further support expansion and creation of places. This is a 39% increase in the number of known wraparound childcare providers in the county. As the project is ongoing the figures quoted in this document reflect the current situation which is rapidly changing.

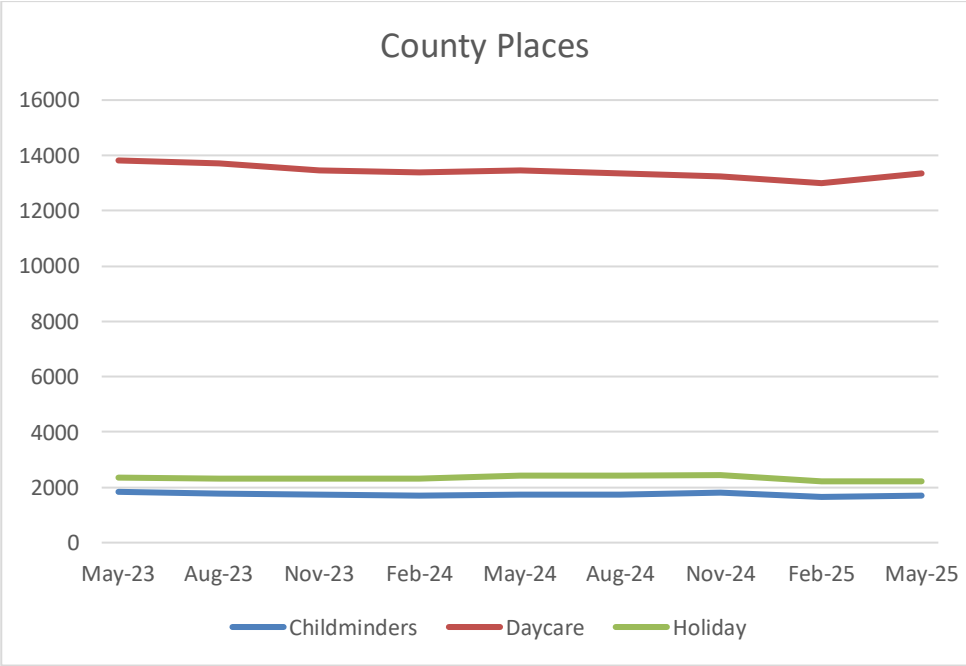
Change in provider numbers yearly comparison

The Following graphs show the total number of providers and places available since the end of May 2023. The data is as at the end of the month.



	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-25	Total % change since 31-05-23
Childminders	-6.9%	-2.7%	-9.5%
Day-care	-2.7%	-2.5%	-5.2%
Holiday	-2.3%	-2.4%	-4.7%

Change in places yearly comparison



	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-25	Total % change since 31-05-23
Childminders	-6.3%	-2.1%	-8.2%
Day-care	-2.7%	-0.6%	-3.3%
Holiday	+4.2%	-9.1%	-5.3%

Hours

Most childcare is most delivered between 8am and 6pm on weekdays. However, some parents require childcare outside these times to fit with their work or other responsibilities.

	Offers childcare before 8am weekday	Offers childcare after 6pm weekday
Childminder	121	27
Day-care	50	7

Costs

For early years childcare outside the funded entitlements, we report an average cost per hour, reported to us by settings. Not all providers have given detailed information on their charges, the information below is based on the information received.

There may be variations to prices based on the number of hours a family uses, with reductions for longer hours, or discounts for sibling groups. There may be supplementary payments made for additional services, e.g., lunch and other meals which are not included in these prices.

	0 - 2-year-olds	3- and 4-year-olds	School aged children, 5 years and over
Childminder	£5.25	£4.82	£5.15
Day-care	£6.54	£5.77	£5.68

**Source: Capita one V4 via early years portal*

Quality of childcare in Gloucestershire

Ofsted inspection grades up to end May 25

Gloucestershire currently has 82 Early Years providers that are awaiting their first graded inspection (usually within 30 months of registration).

Of those providers inspected, Gloucestershire currently has 91.9% of childminders that received a good or outstanding Ofsted outcome and 8.1% compliant /met. 92.1% of day care providers have a good or outstanding Ofsted outcome with 4.4% compliant/met. When added together, compared to the same time in 2024 this is an increase of 0.9% for childminders and an increase of 1.6% day care.

Private and voluntary providers who care for children from birth to 18 years must register with Ofsted on the Early Years Register. Childminders have the option to either register on the Early Years Register with Ofsted or a Childminder Agency. Schools and standalone maintained nursery schools are on the Schools Register. The grades for both registers are equivalent. Schools with nurseries have an overall inspection grade for the whole school and most will also have a separate early year's grade within the whole school inspection report.

Both schools and early years providers have four Ofsted grades: 'outstanding,' 'good,' 'requires improvement,' and 'inadequate.' Childminders on the Childminder Agency would be independently graded by the agency using the same inspection outcomes. Some providers will still be awaiting their first full inspection. These providers are excluded from our calculation. Nursery classes in independent schools do not have an Ofsted grade.

Analysis of the themes from Ofsted inspection reports during the Autumn 2024 and Spring 2024 terms identified the Leadership and Management, including staff development, supervision, self-evaluation, and staff deployment, as the area's most in need of improvement as these areas achieved either Requires Improvement or Inadequate inspection grades.

	Number & % achieving good or outstanding	Number & % achieving compliant /met	Number & % achieving non- compliant not met	Number & % achieving requires improvement	Number & % achieving inadequate
Childminders	182 (91.9%)	16 (8.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Agency Childminders	5 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Day Nursery (non gov run)	129 (97.0%)	1 (0.7%)	0 (0.0%)	3 (2.3%)	0 (0.0%)
Day Nursery (gov run)	2 (100%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Day Nursery (academy trust run)	2 (100%)	0 (0.0%)	0 (0.0%)	0 (0%)	0 (0.0%)
Pre-School Playgroup (non gov run)	105 (99.0%)	0 (0.0%)	0 (0.0%)	1 (1.0%)	0 (0.0%)
Pre-School Playgroup (gov run)	32 (88.9%)	0 (0.0%)	0 (0.0%)	4 (11.1%)	0 (0%)
Pre-School Playgroup (academy trust run)	17 (85.0%)	0 (0.0%)	0 (0.0%)	3 (15.0%)	0 (0.0%)
Nursery Unit of Independent Schools	3 (20.0%)	12 (80.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Out of school (non gov run)	33 (42.3%)	43 (55.1%)	1 (1.3%)	1 (1.3%)	0 (0.0%)
Out of School (gov run)	22 (78.6%)	6 (21.4%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Out of School (academy trust gov run)	8 (72.7%)	0 (0.0%)	0 (0.0%)	3 (27.3%)	0 (0.0%)
Holiday (non gov run)	27 (45.8%)	31 (52.5%)	1 (1.7%)	0 (0%)	0 (0.0%)
Holiday (gov run)	1 (50.0%)	1 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Holiday (academy trust gov run)	2 (66.7%)	0 (0.0%)	0 (0.0%)	1 (33.3%)	0 (0.0%)

Specific areas included.

- Ensure staff are more confident with child protection /safeguarding procedures.
- Ensure safeguarding procedures are implemented effectively.

The Early years' service has recently introduced Leadership and Management meetings to support early years' managers to develop practice further to address this, and other areas highlighted as in need of improvement. An EY specific module of safeguarding training had been developed, all EY staff are encouraged to access this training to further improve knowledge and confidence in safeguarding practice, alongside the mandatory safeguarding modules.

Providers with met / not met grade

When providers do not have any children on site at the time of their inspection, they are not graded but given an Ofsted outcome of 'met' or 'not met.' This shows whether they are meeting the requirements for Ofsted registration. 'Met' indicates that they are meeting all legal requirements of registration; 'Not Met' means that there are some areas for improvement. At present, we have 27 providers with a 'Met' grade and 1 provider with a 'Not Met' grade.

Childminder Agency

There are currently 13 Gloucestershire childminders who have registered with a Childminder Agency rather than with Ofsted. They are all awaiting inspection. Several Gloucestershire Childminders had joined the Rutland Childminder Agency however when this agency closed, the Childminders were given the option to either transfer to Ofsted or to another agency, the majority have chosen to join an alternative agency or have exited the Early Years childminding sector

Quality Improvement

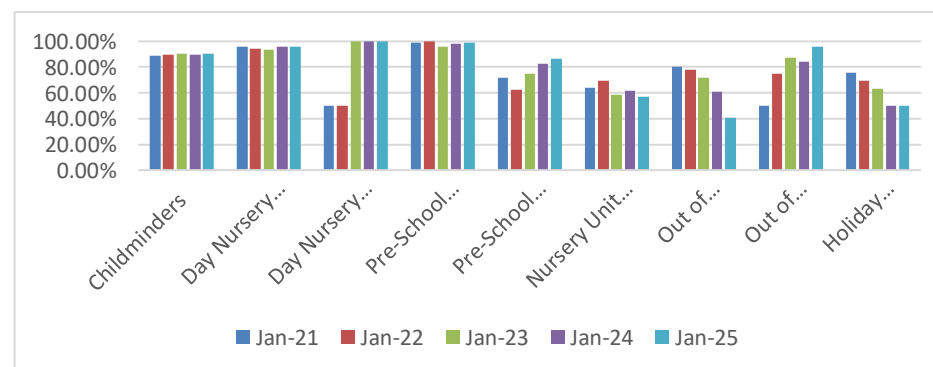
Providers who receive Inadequate, Requires Improvement, or Not Met inspection outcomes are encouraged to sign up to the Early Years Intervention Programme of support, provided by the EY Service. Providers are offered a range of advice and support to address Ofsted

recommendations and are regularly monitored until their next graded Good or Outstanding inspection outcome.

Comparing inspection grades over time

Below shows the trends for the percentage of providers either 'good' or 'outstanding.'

	Jan 2021	Jan 2022	Jan 2023	Jan 2024	Jan 2025
Childminders	89.1%	89.3%	90.2%	89.9%	90.8%
Day Nursery (non gov run)	95.6%	94.2%	93.2%	95.6%	95.6%
Day Nursery (gov run)	50.0%	50.0%	100%	100%	100%
Pre-School Playgroup (non gov run)	99.2%	100%	95.9%	98.2%	99.0%
Pre-School Playgroup (gov run)	71.4%	62.5%	75.0%	82.5%	86.5%
Nursery Unit of Independent Schools	64.3%	69.2%	58.3%	61.5%	57.1%
Out of school (non gov run)	80.0%	77.8%	71.4%	61.1%	41.0%
Out of School (gov run)	50.0%	75.0%	87.5%	84.4%	95.7%
Holiday Playscheme	75.4%	69.5%	62.9%	50.0%	50.0%



Funded Early Education in Gloucestershire

Introduction to funded early education entitlement.

Some children are entitled to free childcare, funded by the government. These entitlements are for 38 weeks per year but can be stretched to access less hours per week for up to 52 weeks per year.

- All children aged 3 and 4 are entitled to 15 hours per week term time only until they start reception class in school, which equates to 570 hours per year.
- Children aged 3 and 4 where both parents are working, or from lone parent families where that parent is working, are entitled to 30 hours per week until they start reception class in school (available to families where each parent (or one parent in a single adult household) are earning the equivalent of working sixteen hours per week on the minimum wage), which equates to 1140 hours per year.
Parents do not have to use all the hours of their funded entitlement. They may choose to split them between providers. With the agreement of their provider, parents may also spread them across the year, for example, rather than taking 15 hours per week for 38 weeks a year they could take just under 12 hours per week for 48 weeks a year.
- Children aged 2 whose families receive certain benefits (including low-income families in receipt of in-work benefits), or those who meet additional non-economic criteria, are entitled to 15 hours per week. Nationally, about 40% of 2-year-olds are entitled to this offer, but the proportion varies by area.
- Gloucestershire providers offer funded places to disadvantaged 2-year-olds on the understanding that the child remains eligible until they become eligible for the universal entitlement for three- and four-year-olds. Gloucestershire County Council have a discretionary offer for 2-year-olds that are being supported through the Graduated

Pathway with clearly identified needs relating to SEN or disability. Further details relating to the statutory criteria for disadvantaged 2-year-old funding can be found at 15 hours early learning for families in England receiving some additional forms of support | Childcare Choices

- From April 2024, children aged 2 where both parents were working, or from lone parent families where that parent is working, were entitled to 15 hours funded early years education per week. From September 2024, the scheme was extended to include families with children from aged 9 – 23 months.
- From September 2025 the Working Parents Entitlements will extend again to 30 hours funded early education for children from aged 9 months until they start reception class in school.

Consultation with childcare providers

The Local authority is required to consult with all childcare providers regarding the Early Years Entitlement Funding rates. From September 2024 we trialled monthly funding payments and in May 2025 we consulted again with the sector to monitor the effectiveness of this programme of payment delivery to review the plan for 2025/26.

Number of providers currently offering funded early education places

	Reg for new for 2 funding	Reg for nursery education grant	Offering 30 hours
Childminders	203	209	209
Day-care	298	337	324

Take up of funded early education.

The percentage of eligible children taking up their funded place (for at least some of the available hours) in Gloucestershire is:

	Autumn Term 2024	Spring Term 2025	Summer Term 2025
Disadvantaged 2-year-olds	65.9%	59.2%	55.0%
3-year-olds universal	94.9%	97.4%	96.2%
4-year-olds universal	97.4%	94.2%	92.3%
9 months to 1-year extended entitlement	89.0%	74.0%	91.7%
1-year olds extended entitlement	93.8%	90.1%	92.4%
2-year-olds extended entitlement	92.8%	93.1%	94.5%

* Take up of the extended entitlement is measured by the number of issued entitlement codes that have been validated by an early years provider

Ethnicity of current Funded Childcare based on the Capita data collection information

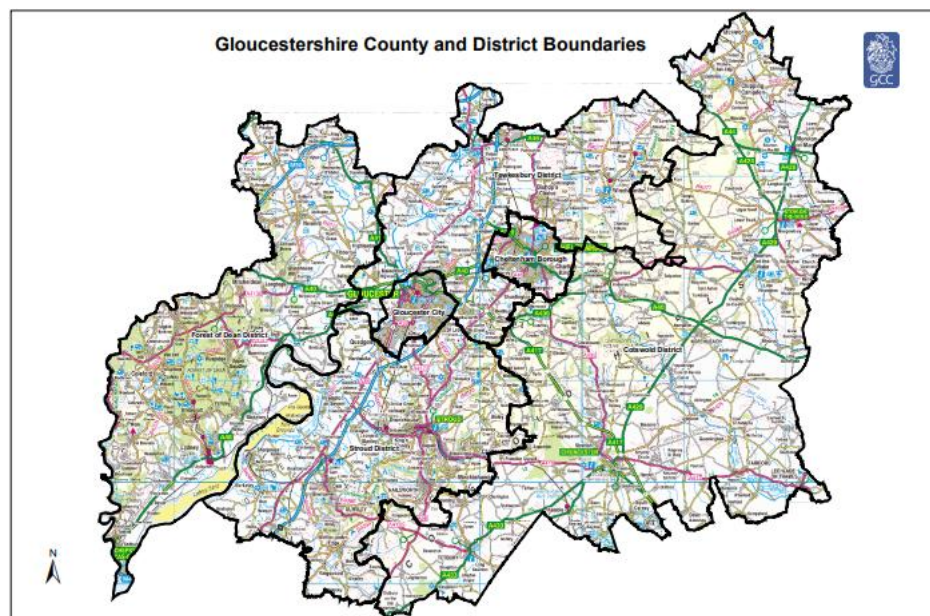
	9 mths to 1-year olds	1-year Olds	2-year Olds	3-year-olds	4-year-olds
Asian or Asian British	0.5%	1.3%	2.1%	4.4%	4.8%
Black, Black British, Caribbean, or African	0.5%	1.1%	1.0%	2.4%	2.9%
Mixed or multiple ethnic groups	6.3%	4.7%	5.5%	5.2%	4.3%
White	91.9%	91.7%	90.1%	85.9%	85.4%
Other ethnic group	0.5%	0.3%	0.4%	0.6%	0.6%
Refused or not obtained	0.3%	0.9%	0.9%	1.6%	2.0%

3- and 4-year-old funded extended entitlement applications

Parents can establish their funded childcare entitlement online through the Government's Childcare Support website. The same website is used to apply for Tax Free Childcare and parents can apply for either or both. If a parent is eligible, the system creates a code which they can use with their chosen childcare provider. Parents will be advised if they are entitled to 15 or 30 hours (extended offer).

	Autumn 2024	Spring 2025	Summer 2025
No of 3-Year-Olds Extended	3241	3415	3404
No of 4-Year-Olds Extended	73	1188	1954

Early Years Sufficiency Geography & Boundaries



Cheltenham Borough Council Wards.....20

E05015704	All Saints
E05015705	Battledown
E05015706	Benhall and the Reddings
E05015707	Charlton Kings
E05015708	Charlton Park
E05015709	College
E05015710	Hesters Way
E05015711	Lansdown

E05015712	Leckhampton
E05015713	Oakley
E05015714	Park
E05015715	Pittville
E05015716	Prestbury
E05015717	Springbank
E05015718	St Mark's
E05015719	St Paul's
E05015720	St Peter's
E05015721	Swindon Village
E05015722	Up Hatherley
E05015723	Warden Hill

Cotswold District Council Wards.....32

E05010696	Abbey
E05010697	Blockley
E05010698	Bourton Vale
E05010699	Bourton Village
E05010700	Campden & Vale
E05010702	Chesterton
E05010703	Coln Valley
E05010705	Fairford North
E05010706	Fosseridge
E05010707	Four Acres
E05010708	Grumbolds Ash with Avening
E05010709	Kemble
E05010710	Lechlade, Kempsford & Fairford South
E05010711	Moreton East

E05010712	Moreton West
E05010713	New Mills
E05010714	Northleach
E05010715	St Michael's
E05010717	Siddington & Cerney Rural
E05010718	South Cerney Village
E05010719	Stow
E05010721	Tetbury East & Rural
E05010722	Tetbury Town
E05010723	Tetbury with Upton
E05010724	The Ampneys & Hampton
E05010725	The Beeches
E05010726	The Rissingtons
E05010727	Watermoor
E05015554	Chedworth & Churn Valley
E05015555	Ermin
E05015556	Sandywell
E05015557	Stratton

Forest of Dean District Council Wards.....21

E05012156	Berry Hill
E05012157	Bream
E05012158	Cinderford East
E05012159	Cinderford West
E05012160	Coleford
E05012161	Dymock
E05012162	Hartpur & Redmarley
E05012163	Longhope & Huntley

E05012164	Lydbrook
E05012165	Lydney East
E05012166	Lydney North
E05012167	Lydney West & Aylburton
E05012168	Mitcheldean, Ruardean & Drybrook
E05012169	Newent & Taynton
E05012170	Newland & Sling
E05012171	Newnham
E05012172	Pillowell
E05012173	Ruspidge
E05012174	St. Briavels
E05012175	Tidenham
E05012176	Westbury-on-Severn

Gloucester City Council Wards.....18

E05010950	Abbeydale
E05010951	Abbeymead
E05010952	Barnwood
E05010953	Barton and Tredworth
E05010954	Coney Hill
E05010955	Elmbridge
E05010956	Grange
E05010957	Hucclecote
E05010958	Kingsholm and Wotton
E05010959	Kingsway
E05010960	Longlevens
E05010961	Matson, Robinswood and White City
E05010962	Moreland

E05010963	Podsmead
E05010964	Quedgeley Fieldcourt
E05010965	Quedgeley Severn Vale
E05010966	Tuffley
E05010967	Westgate

Stroud District Council Wards.....27

E05010969	Berkeley Vale
E05010972	Cam East
E05010973	Cam West
E05010975	Coaley and Uley
E05010976	Dursley
E05010981	Painswick and Upton
E05010982	Randwick, Whiteshill and Ruscombe
E05010986	Stroud Central
E05010987	Stroud Farmhill and Paganhill
E05010988	Stroud Slade
E05010990	Stroud Uplands
E05010991	Stroud Valley
E05010992	The Stanleys
E05013187	Amberley and Woodchester
E05013188	Bisley
E05013189	Chalford
E05013191	Kingswood
E05013192	Minchinhampton
E05013193	Nailsworth
E05013194	Rodborough
E05013197	Stroud Trinity

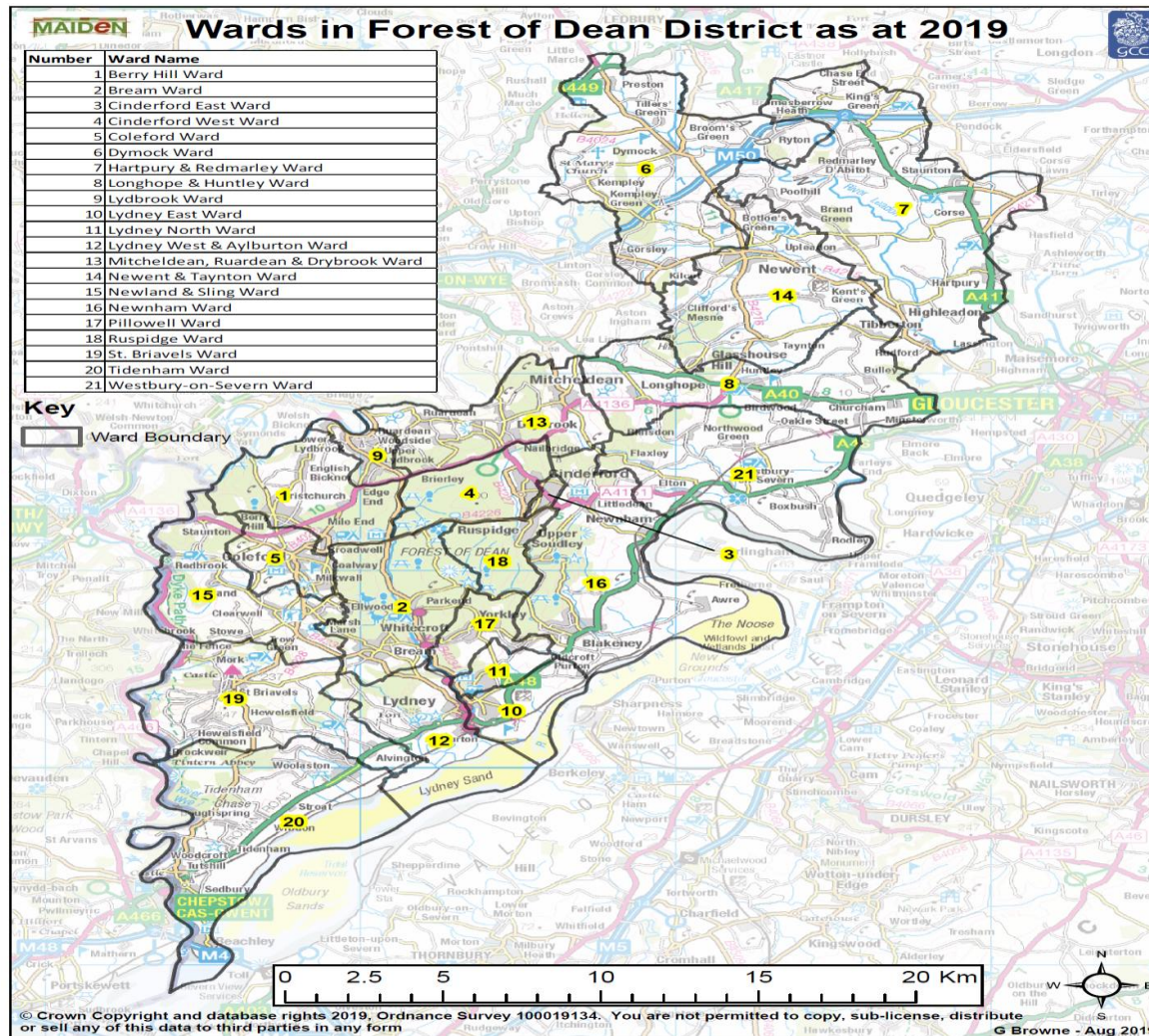
E05013198	Thrupp
E05013199	Wotton-under-Edge
E05013212	Cainscross
E05015846	Hardwicke
E05015847	Severn
E05015848	Stonehouse

Tewkesbury Borough Council Wards.....20

E05012065	Brockworth East
E05012066	Brockworth West
E05012071	Cleeve St Michael's
E05012072	Cleeve West
E05012073	Highnam with Haw Bridge
E05012076	Northway
E05012077	Severn Vale North
E05012078	Severn Vale South
E05012079	Shurdington
E05012081	Tewkesbury North & Twynning
E05012082	Tewkesbury South
E05012083	Winchcombe
E05015480	Badgeworth
E05015481	Churchdown Brookfield with Hucclecote
E05015482	Churchdown St John's
E05015483	Cleeve Grange
E05015484	Cleeve Hill
E05015485	Innsworth
E05015486	Isbourne
E05015487	Tewkesbury East

Early Years Childcare Sufficiency by district

Forest of Dean

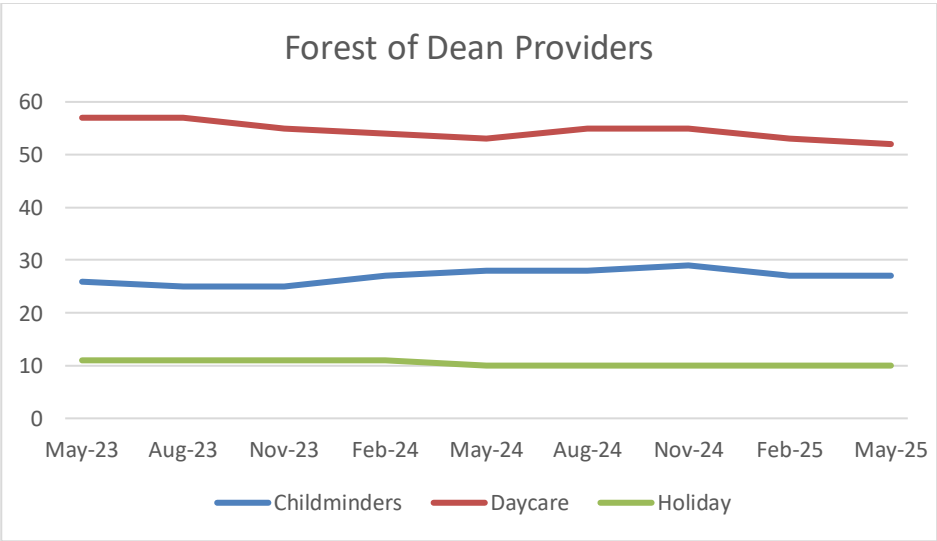


Change in providers and places since last sufficiency report

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there has been a 2.5% (2) decrease in the number of early years' providers and a 2.1% (44) increase in the overall number of places. For Holiday providers there has been no change in the number of providers and places. Based on provider data available there is a predicated shortfall of childcare places in the planning areas of Brooks Dean, Cinderford, Lydney and West Severn, this will be further impacted as more families become eligible for funded childcare. Based on local intelligence we are aware of challenges within the planning area of Hartpury however we have supplied grant money to schools within Redmarley who are now going to be delivering the expanded entitlements. We continue to work with childcare providers and GCC colleagues to support the sustainability of current provision and the development of additional childcare places in these areas.

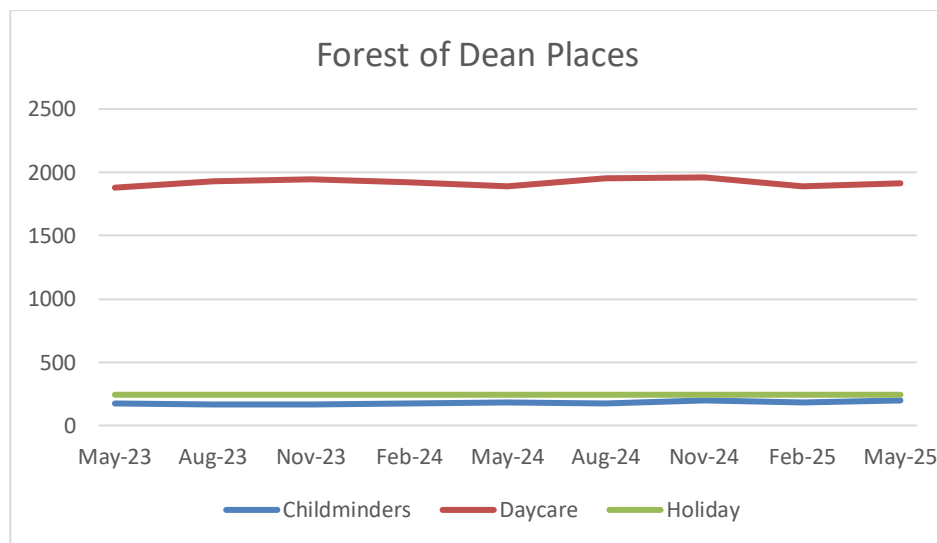
Change in provider numbers yearly comparison

The Following graphs show the total number of providers and places available since the end of May 2023. The data is as at the end of the month.



	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-25	Total % change since 31-05-23
Childminders	+7.7%	-3.6%	+3.8%
Day-care	-7.0%	-1.9%	-8.8%
Holiday	-9.1%	0.0%	-9.1%

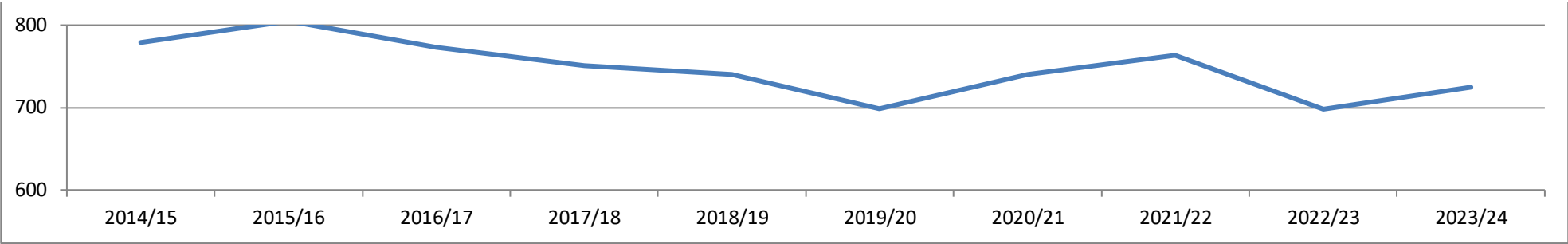
Change in places yearly comparison



	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-25	Total % change since 31-05-23
Childminders	+4.7%	+9.4%	+14.5%
Day-care	+0.4%	+1.4%	+1.8%
Holiday	0.0%	0.0%	0.0%

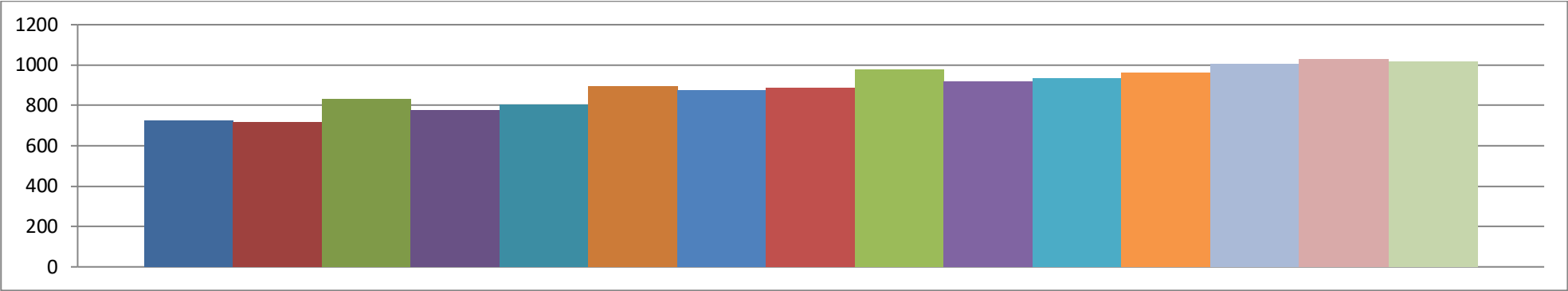
Births

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Number of Births	779	805	773	751	740	699	740	763	698	725



Population

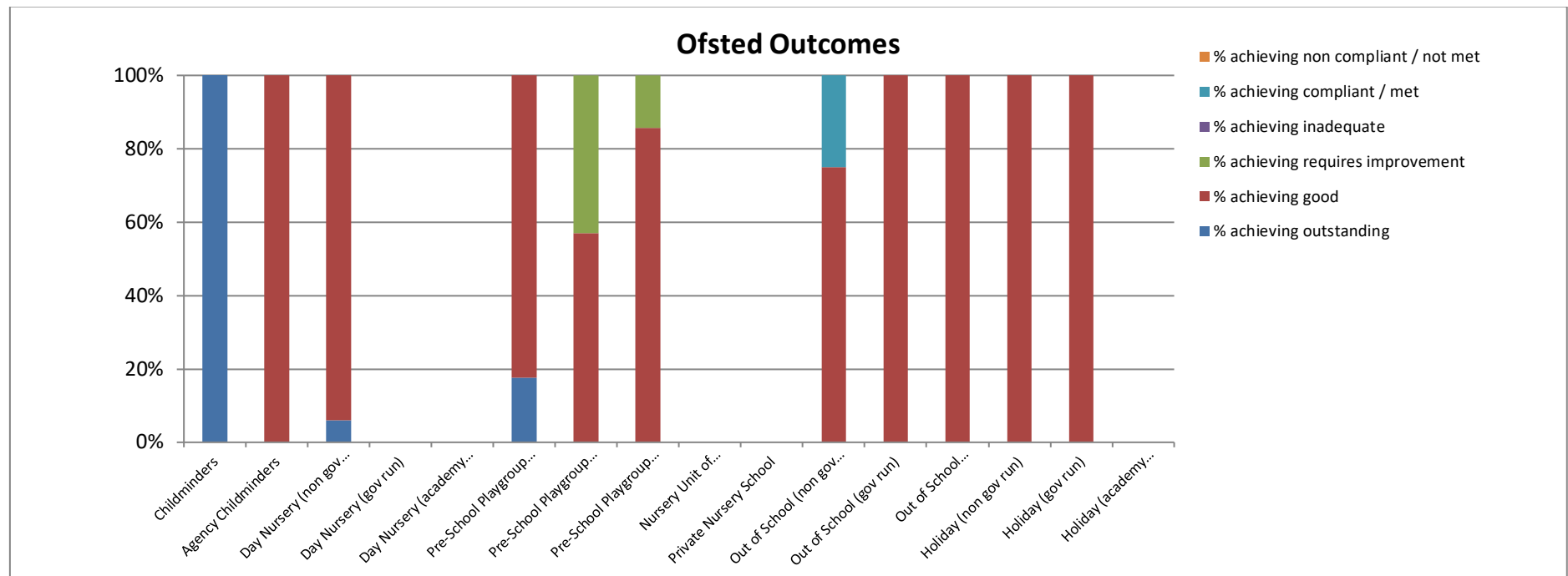
Population (Source: GP Data 2024)														
0 years	1 years	2 years	3 years	4 years	5 years	6 years	7 Years	8 years	9 years	10 years	11 years	12 years	13 years	14 Years
725	717	832	777	806	896	876	889	981	919	937	963	1009	1031	1021



Childcare Provision

	No of providers	No of registered places	No & % achieving outstanding	No & % achieving good	No & % achieving requires improvement	No & % achieving inadequate	No & % achieving compliant / met	No & % achieving non-compliant / not met
Childminders	26	191	1 (4.8%)	17 (80.9%)			3 (14.2%)	
Agency Childminders	1	6		1 (100.0)				
Day Nursery (non gov run)	18	1100	1 (5.9%)	16 (94.1%)				
Day Nursery (gov run)	1	21						
Day Nursery (academy trust gov run)	1	20						
Pre-School Playgroup (non gov run)	17	490	3 (17.6%)	14 (82.4%)				
Pre-School Playgroup (gov run)	8	112		4 (57.1%)	3 (42.9%)			
Pre-School Playgroup (academy trust gov run)	7	170		6 (85.7%)	1 (14.3%)			
Nursery Unit of Independent Schools								
Private Nursery School								
Out of school (non gov run)	19	276		9 (75.0%)			3 (25.0%)	
Out of School (gov run)	3	56		2 (100%)				
Out of School (academy trust gov run)	3	72		2 (100%)				
Holiday (non gov run)	9	217		9 (100.0%)				
Holiday (gov run)								
Holiday (academy trust gov run)	1	26		1 (100.0%)				

NB: Totals will not always add up as some settings will be awaiting an Ofsted outcome and some governors run settings will come under schools Ofsted.

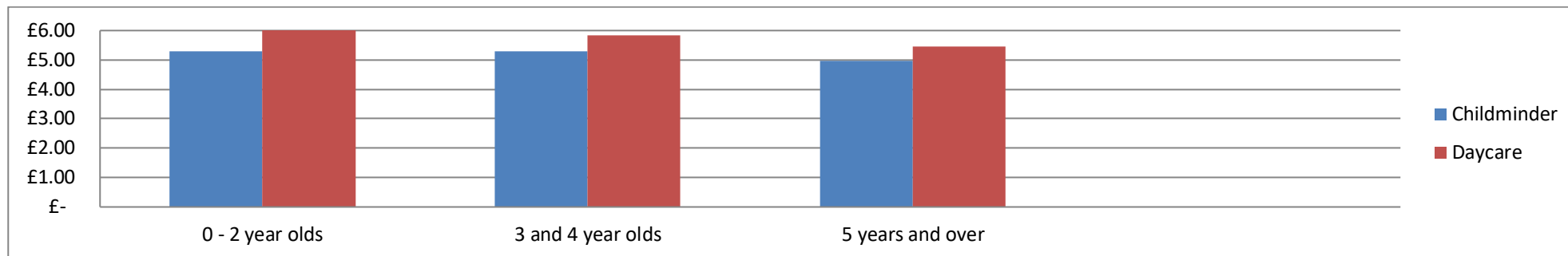


Childcare Offer

	Reg for new for 2 funding	Reg for nursery education grant	Offering 30 hours	Offers childcare before 8am weekday	Offers childcare after 6pm weekday
Childminder	20	20	20	10	3
Daycare	43	51	52	11	0

Average Costs

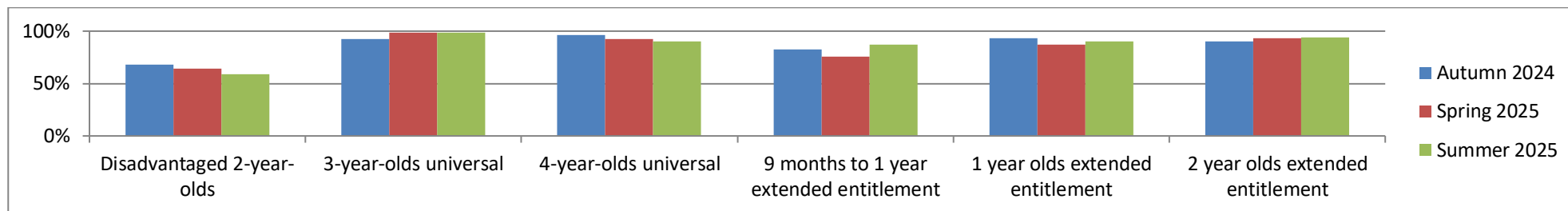
	0 - 2-year-olds	3- and 4-year-olds	School aged children, 5 years and over
Childminder	£5.30	£5.21	£4.98
Day-care	£6.43	£5.83	£5.45



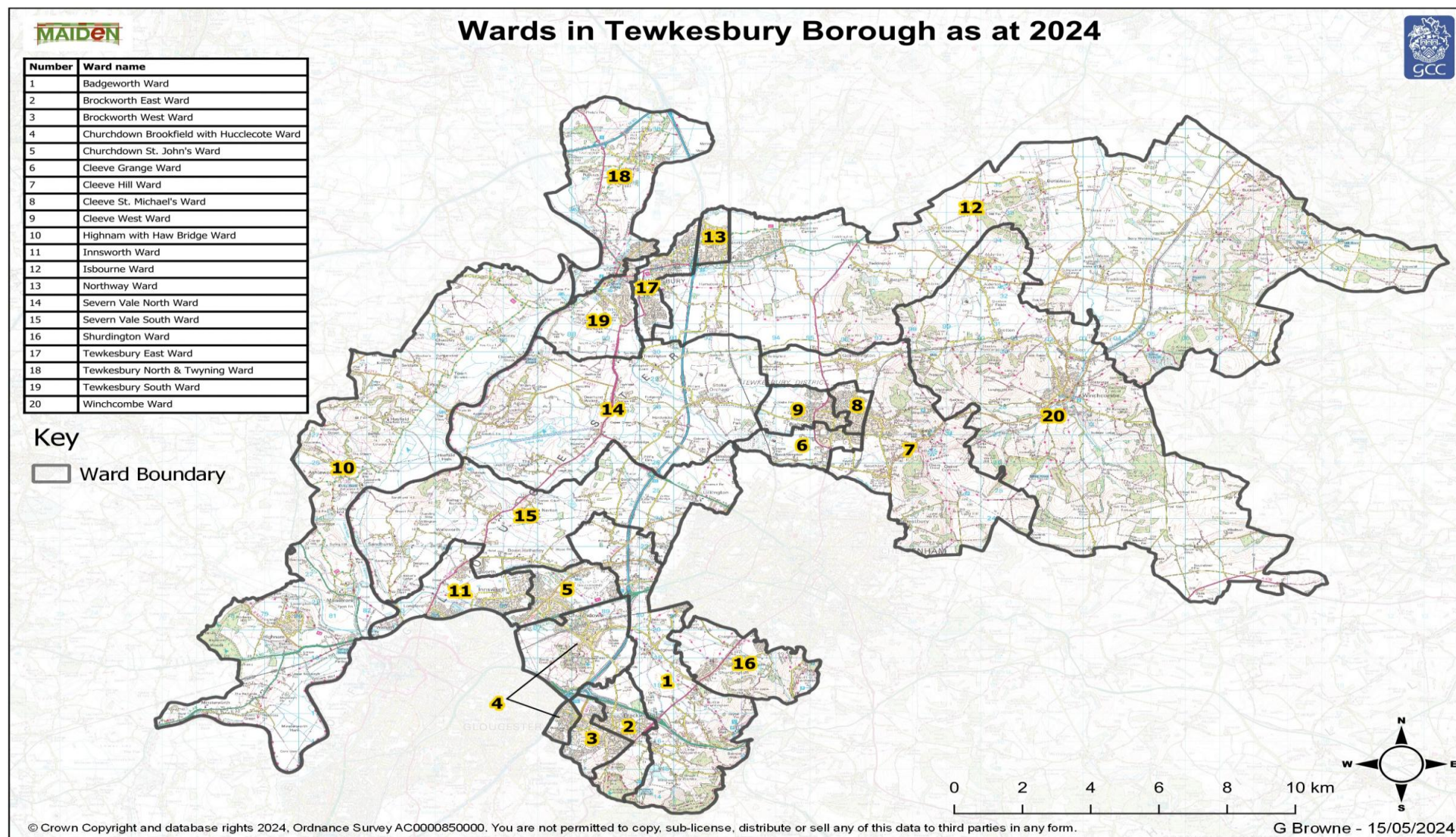
Funding

	Autumn 2024	Spring 2025	Summer 2025
Disadvantaged 2-year-olds	68.0%	64.3%	59.2%
3-year-olds universal	92.7%	98.5%	98.3%
4-year-olds universal	96.3%	92.6%	90.3%
9 months to 1-year extended entitlement	82.2%	75.8%	87.1%
1-year olds extended entitlement	93.3%	86.8%	90.1%
2-year-olds extended entitlement	90.2%	92.9%	94.1%

* Take up of the extended entitlement is measured by the number of issued entitlement codes that have been validated by an early years provider



Tewkesbury



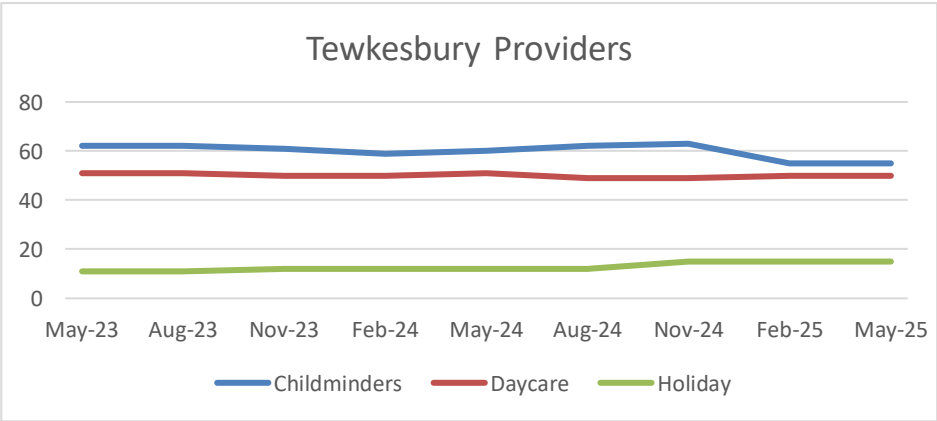
Change in providers and places since last sufficiency report

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there has been a 5.4% (6) decrease in the number of early years' providers and a 0.8% (20) decrease in the overall number of places. For Holiday providers there has been a 25% (3) increase in the number of providers and a 9.8% (24) increase in places. Based on provider data available, the planning areas of Tewkesbury / Ashchurch within this locality are currently showing insufficient childcare places in Tewkesbury locality; there are major business developments underway in this area with completion due in Summer 2024. We anticipate there will be a shortfall of places in the Bishops Cleeve, Tewkesbury/ Ashchurch and Winchcombe planning areas once the new Early Years Entitlements are introduced and eligibility for funded hours increases throughout 2024 and 2025.

We continue to closely monitor the situation to ascertain demand for additional childcare places and investment required to ensure sufficient childcare places. S106 funding and Early Years Expansion Capital funding will be committed to these areas to support meeting the demand for places.

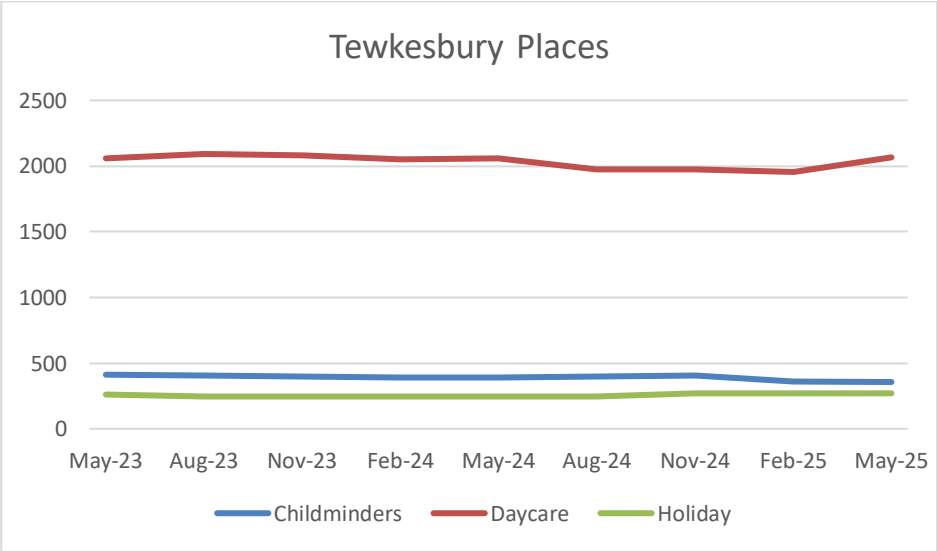
Change in provider numbers yearly comparison

The Following graphs show the total number of providers and places available since the end of May 2023. The data is as at the end of the month.



	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-25	Total % change since 31-05-23
Childminders	-3.2%	-8.3%	-11.3%
Day-care	0.0%	-2.0%	-2.0%
Holiday	+9.1%	+25.0%	+36.4%

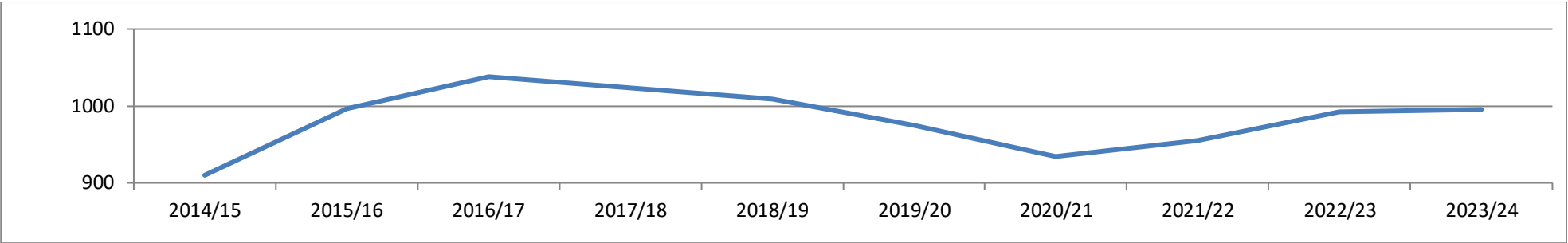
Change in places yearly comparison



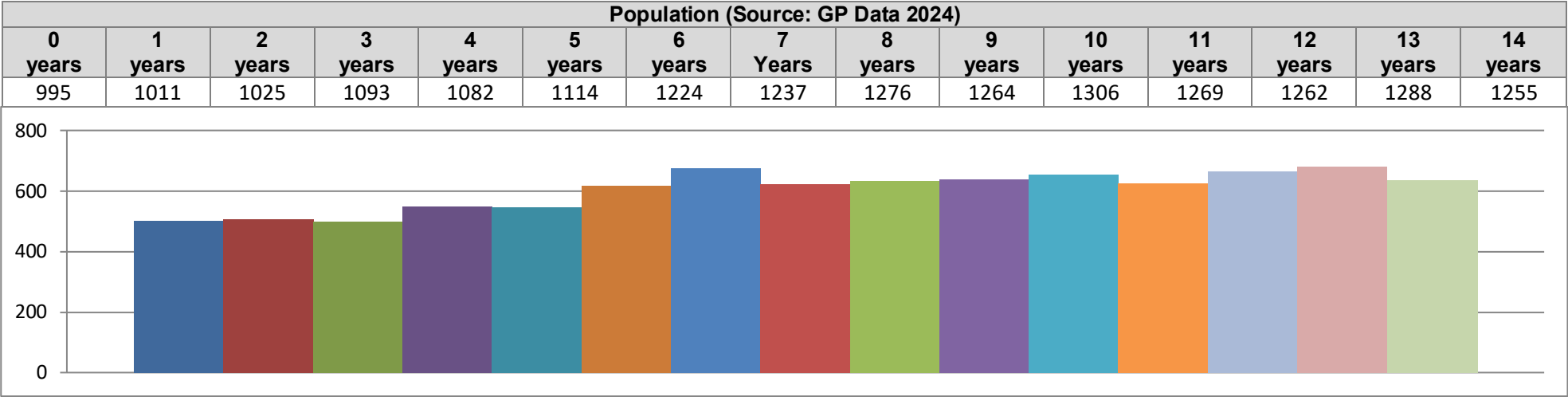
	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-25	Total % change since 31-05-23
Childminders	-6.1%	-8.0%	-13.6%
Day-care	-0.1%	+0.5%	+0.4%
Holiday	-6.8%	+6.00%	+2.3%

Births

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Number of Births	910	997	1038	1023	1009	975	934	955	992	995



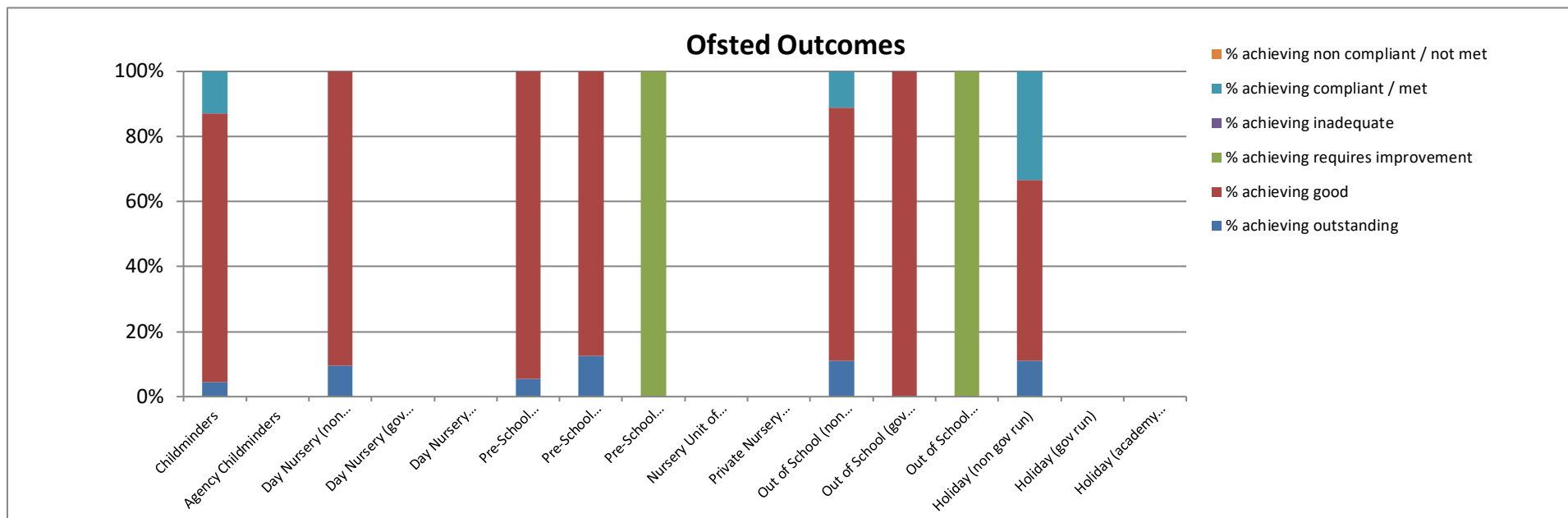
Population



Childcare Provision

	No of providers	No of registered places	No & % achieving outstanding	No & % achieving good	No % achieving requires improvement	No & % achieving inadequate	No & % achieving compliant / met	No % achieving non-compliant / not met
Childminders	53	338	2 (4.5%)	38 (82.5%)			6 (13.0%)	
Agency Childminders	2	18						
Day Nursery (non gov run)	23	1320	2 (9.5%)	19 (90.5%)				
Day Nursery (gov run)								
Day Nursery (academy trust gov run)								
Pre-School Playgroup (non gov run)	18	479	1 (5.6%)	17 (94.4%)				
Pre-School Playgroup (gov run)	8	237	1 (12.5%)	7 (87.5%)				
Pre-School Playgroup (academy trust gov run)	1	32			1 (100%)			
Nursery Unit of Independent Schools								
Private Nursery School								
Out of school (non gov run)	13	344	1 (11.1%)	7 (77.8%)			1 (11.1%)	
Out of School (gov run)	10	244		5 (100%)				
Out of School (academy trust gov run)	2	46			1 (100%)			
Holiday (non gov run)	15	270	1 (11.1%)	5 (55.6%)			3 (33.3%)	
Holiday (gov run)								
Holiday (academy trust gov run)								

NB: Totals will not always add up as some settings will be awaiting an Ofsted outcome and some governors run settings will come under schools Ofsted.

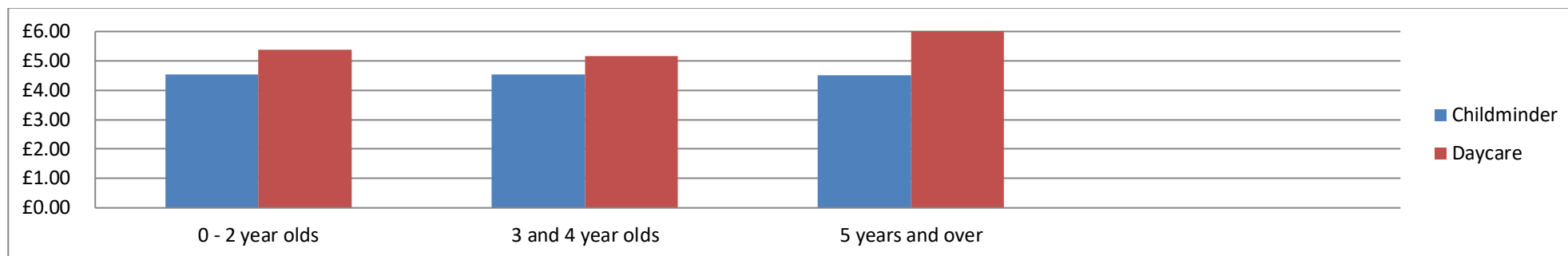


Childcare Offer

	Reg for 2-year funding	Reg for 3- and 4-year funding	Offering 30 hours	Offers childcare before 8am weekday	Offers childcare after 6pm weekday
Childminder	45	46	48	34	4
Day-care	48	50	49	7	0

Average Costs

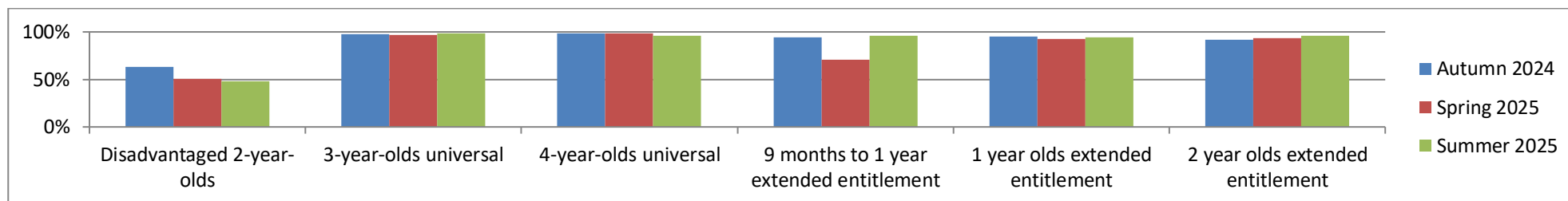
	0 - 2-year-olds	3- and 4-year-olds	School aged children, 5 years and over
Childminder	£4.54	£4.54	£4.50
Day-care	£5.39	£5.16	£6.18



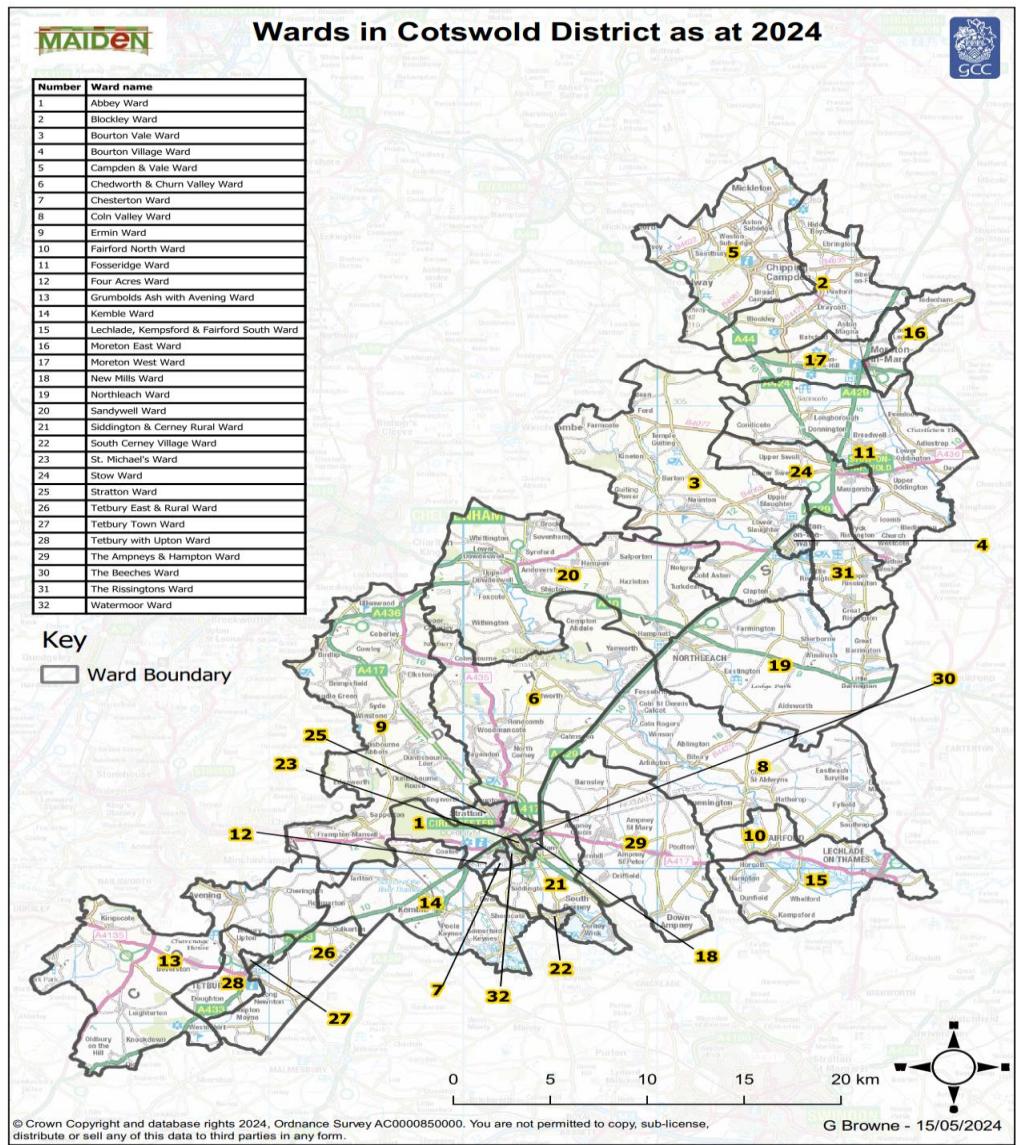
Funding

	Autumn 2024	Spring 2025	Summer 2025
Disadvantaged 2-year-olds	63.2%	50.2%	47.9%
3-year-olds universal	98.0%	97.2%	98.7%
4-year-olds universal	98.4%	98.9%	96.3%
9 months to 1-year extended entitlement	94.5%	71.1%	95.8%
1-year olds extended entitlement	95.2%	92.7%	94.3%
2-year-olds extended entitlement	91.7%	93.8%	95.6%

* Take up of the extended entitlement is measured by the number of issued entitlement codes that have been validated by an early years provider



Cotswolds

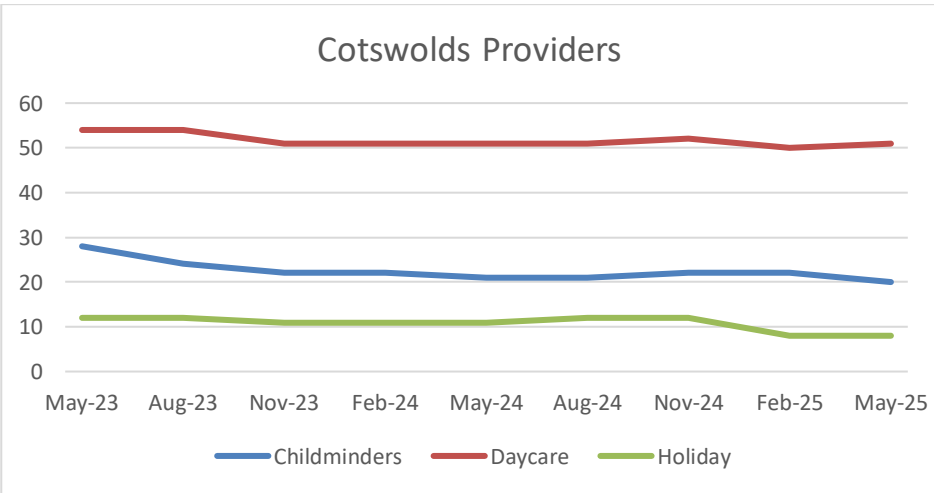


Change in providers and places since last sufficiency report

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there has been a 1.4% (1) decrease in the number of early years' providers and a 0.5% (9) decrease in the overall number of places. For Holiday providers there has been a 27.3% (3) decrease in providers and a 28.7% (108) decrease in places. Based on provider data available, the planning areas of Chipping Campden/Moreton in Marsh are of the greatest concern and currently predicted a shortfall of childcare places. We anticipate a further shortfall of places in all areas of this locality as more families become eligible for funded childcare through the expanded Early Years Entitlements throughout 2024 and 2025. We continue to work with childcare providers and GCC colleagues to support the development of additional childcare places in these areas.

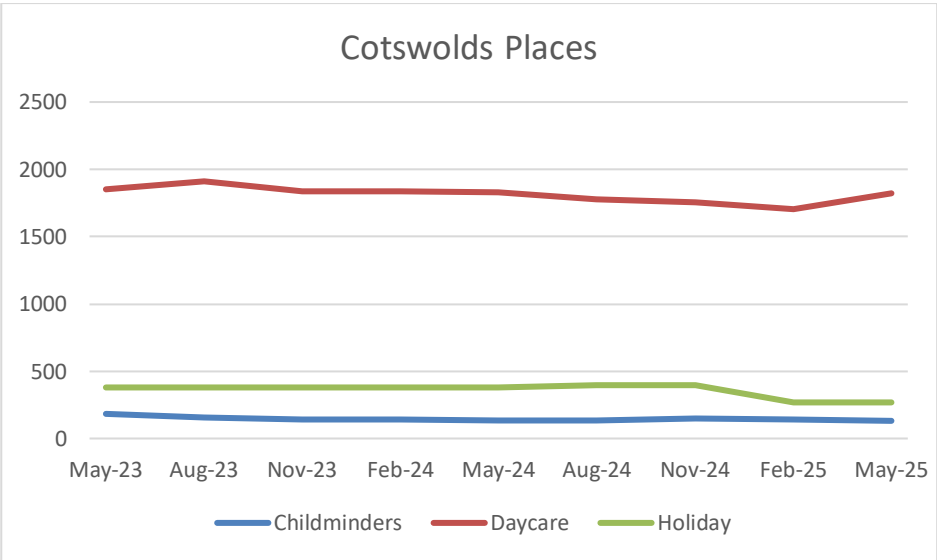
Change in provider numbers yearly comparison

The Following graphs show the total number of providers and places available since the end of May 2023. The data is as at the end of the month.



	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-25	Total % change since 31-05-23
Childminders	-25%	-4.8%	-28.6%
Day-care	-5.6%	-0.0%	-5.6%
Holiday	-8.3%	-27.3%	-33.3%

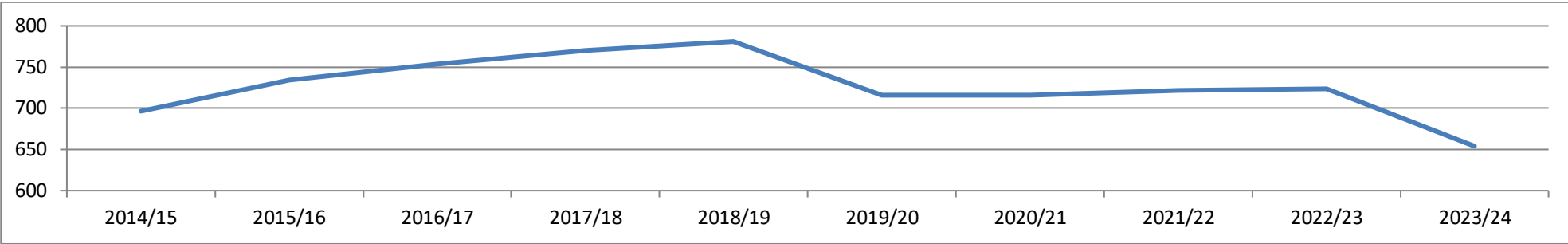
Change in places yearly comparison



	% Change 31-05-23 to 31-05-24	% Change 31-05-24 to 31-05-245	Total % change since 31-05-23
Childminders	-27.9%	-0.8%	-28.4%
Day-care	-1.2%	-0.4%	-1.6%
Holiday	0.0%	-28.7%	-28.7%

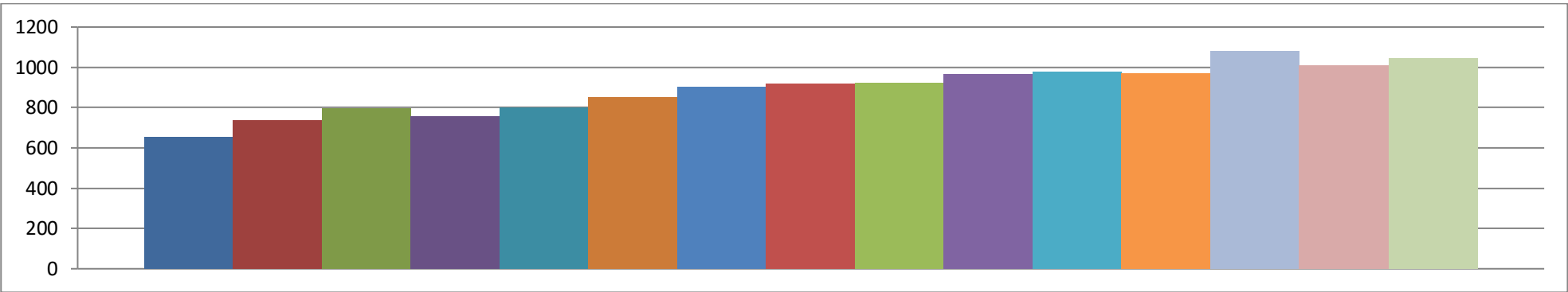
Births

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Number of Births	696	734	754	770	781	716	716	722	724	654



Population

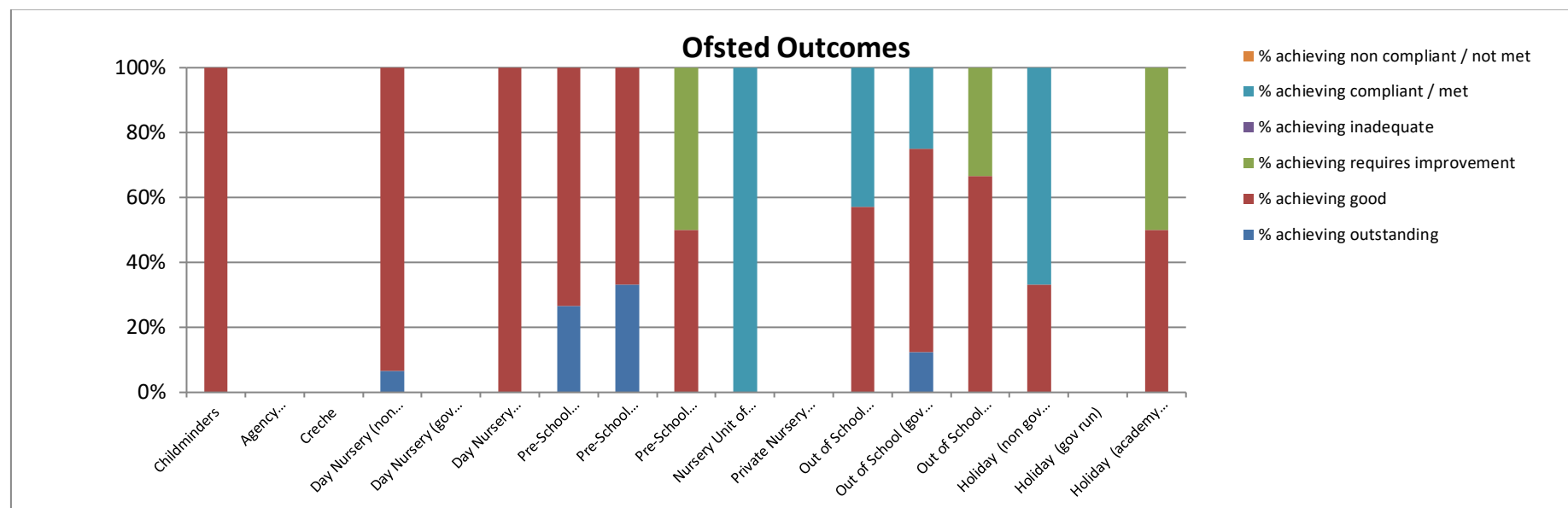
Population (Source: GP Data 2024)														
0 years	1 Years	2 Years	3 years	4 years	5 years	6 years	7 Years	8 years	9 years	10 years	11 years	12 years	13 years	14 years
654	740	798	757	801	854	904	921	925	968	978	971	1084	1013	1046



Childcare Provision

	No of providers	No of registered places	No & % achieving outstanding	No & % achieving good	No & % achieving requires improvement	No & % achieving inadequate	No & % achieving compliant / met	No & % achieving non-compliant / not met
Childminders	20	131		18 (100%)				
Agency Childminders								
Day Nursery (non gov run)	17	894	1 (6.7%)	14 (93.3%)				
Creche	1	26					1 (100%)	
Day Nursery (gov run)	1	13						
Day Nursery (academy trust gov run)	1	8		1 (100%)				
Pre-School Playgroup (non gov run)	15	441	4 (26.7%%)	11 (73.3%)				
Pre-School Playgroup (gov run)	7	174	2 (33.3%)	4 (66.7%)				
Pre-School Playgroup (academy trust gov run)	6	127		1 (50.0%)	1 (50.0%)			
Nursery Unit of Independent Schools	3	136					3 (100%)	
Private Nursery School								
Out of school (non gov run)	12	354		4 (57.1%)			3 (42.9%)	
Out of School (gov run)	9	169	1 (12.5%)	5 (62.5%)			2 (25.0%)	
Out of School (academy trust gov run)	5	116		2 (66.7%)	1 (33.3%)			
Holiday (non gov run)	6	206		2 (33.3%)			4 (66.7%)	
Holiday (gov run)								
Holiday (academy trust gov run)	2	62		1 (50.0%)	1 (50.0%)			

NB: Totals will not always add up as some settings will be awaiting an Ofsted outcome and some governors run settings will come under schools Ofsted.

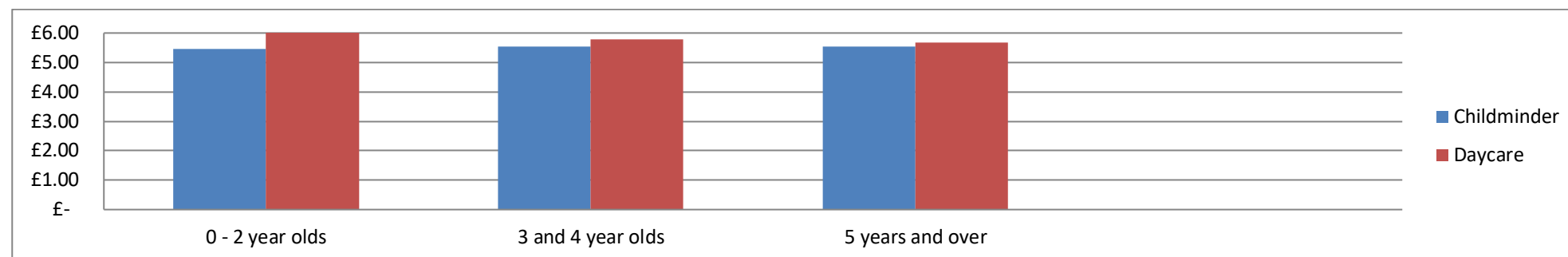


Childcare Offer

	Reg for 2-year funding	Reg for 3-and 4-year funding	Offering 30 hours	Offers childcare before 8am weekday	Offers childcare after 6pm weekday
Childminder	20	20	19	5	0
Day-care	39	49	47	5	0

Costs

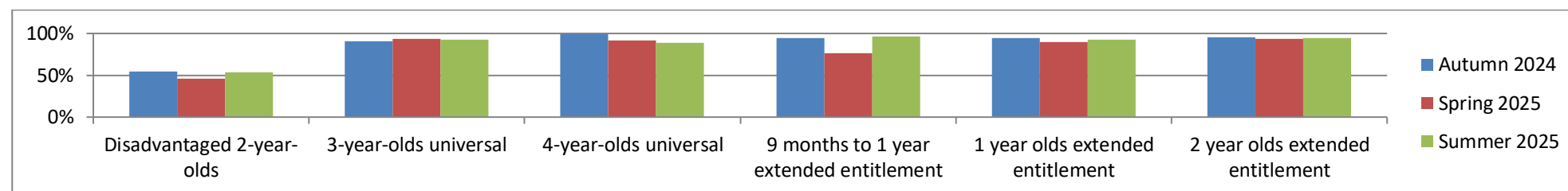
	0 - 2-year-olds	3- and 4-year-olds	School aged children, 5 years and over
Childminder	£5.45	£5.53	£5.55
Day-care	£6.78	£5.78	£5.67

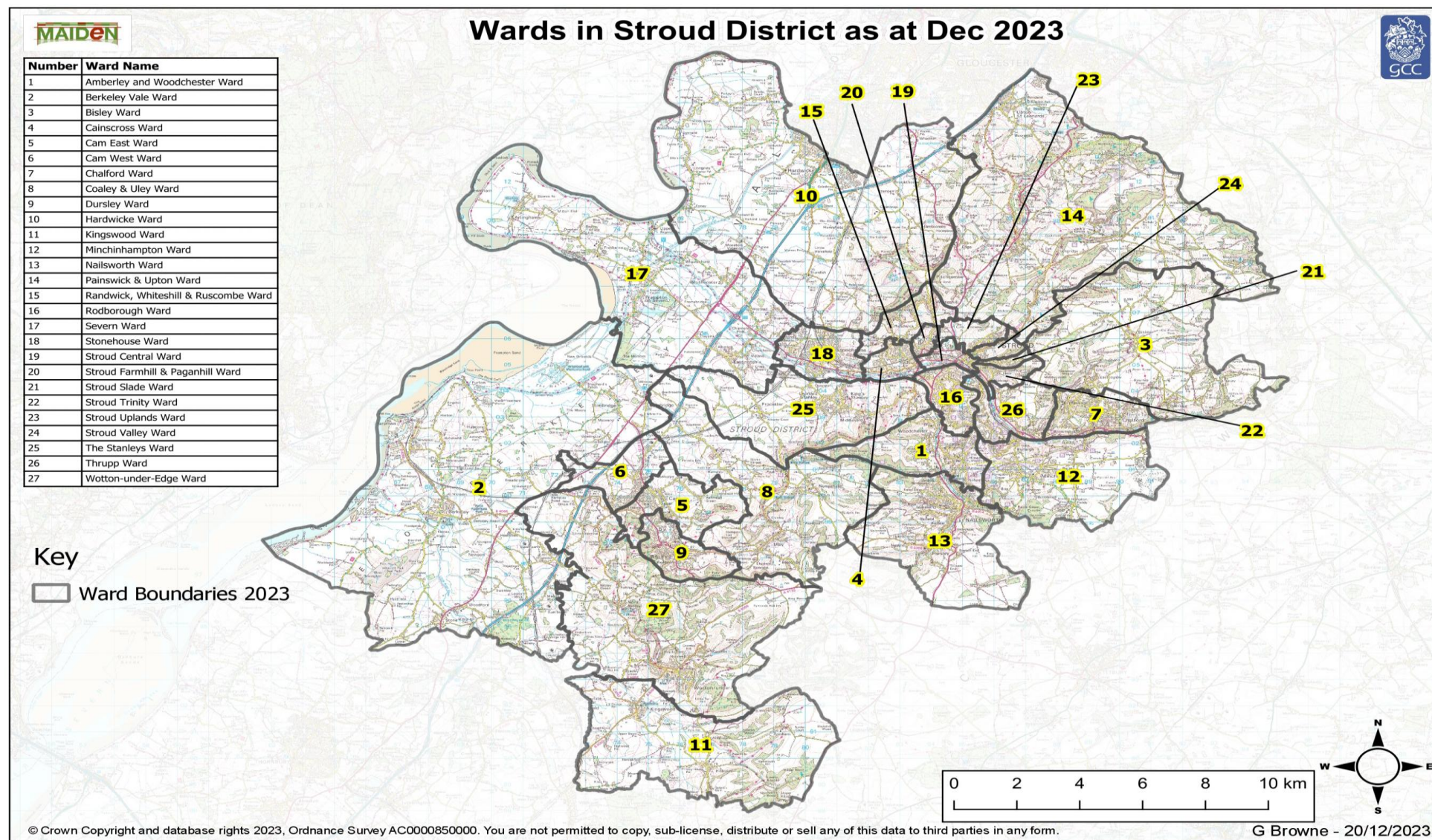


Funding

	Autumn 2024	Spring 2025	Summer 2025
Disadvantaged 2-year-olds	54.7%	45.5%	53.5%
3-year-olds universal	90.8%	93.7%	92.3%
4-year-olds universal	99.2%	91.6%	88.9%
9 months to 1-year extended entitlement	94.5%	76.8%	96.4%
1-year olds extended entitlement	94.7%	90.0%	92.1%
2-year-olds extended entitlement	95.2%	93.6%	94.4%

* Take up of the extended entitlement is measured by the number of issued entitlement codes that have been validated by an early years provider



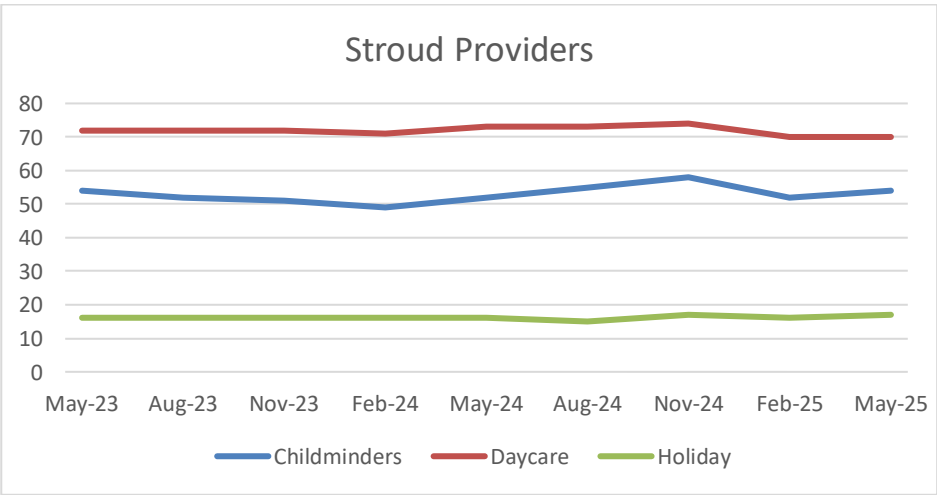


Change in providers and places since last sufficiency report

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there has been 0.8% (1) decrease in the number of early years' providers and a 5.8% (150) decrease in the overall number of places. For Holiday providers there has been a 6.3% (1) increase in providers and a 11% (50) decrease in places. Based on provider data available, the planning areas of Dursley and Stroud Town are still showing the largest predicted shortfall of childcare places. We have been working with childcare providers and GCC colleagues to support the development of additional childcare places in these areas; however the anticipated 24 additional places at two separate sites in this area which was due to be available from the Autumn 2023 has been delayed due to ongoing challenges with recruitment of qualified Early Years staff to deliver the childcare offer. The Early Years Business support team and working with the provider and partners at Job Centre Plus to support with recruitment challenges. We anticipate that there may be a shortfall of places across all areas of the Stroud locality once the Early Years entitlement is further expanded throughout 2025 and 2026

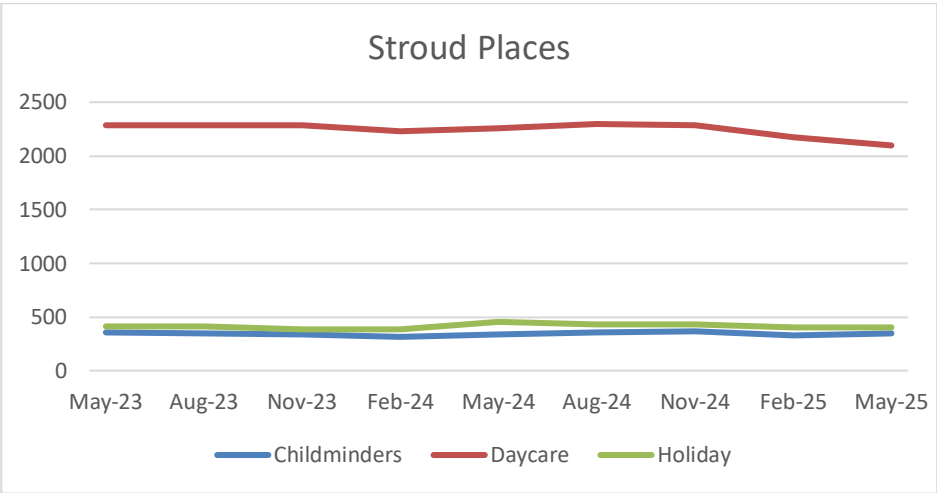
Change in provider numbers yearly comparison

The Following graphs show the total number of providers and places available since the end of May 2023. The data is as at the end of the month.



	% Change 31-05-23 to 31-05-24	% Change 31-05-23 to 31-05-24	Total % change since 31-05-23
Childminders	-3.7%	+3.8%	0.0%
Day-care	+1.4%	-4.1%	-2.8%
Holiday	0.0%	+6.3%	+6.3%

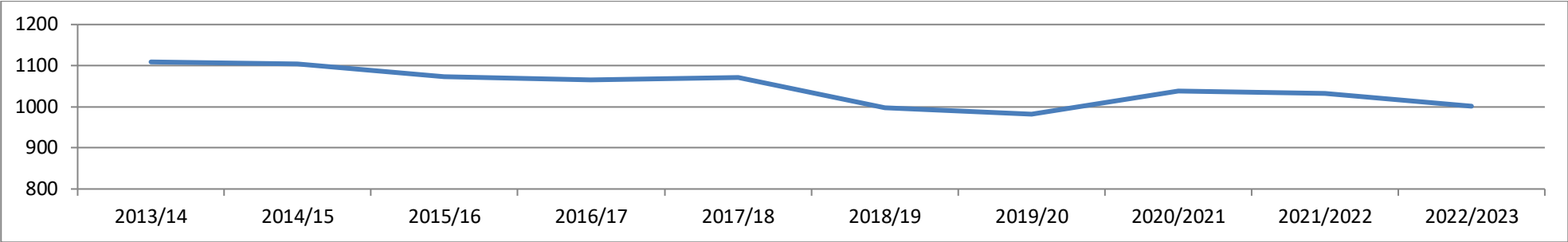
Change in places yearly comparison



	% Change 31-05-23 to 31-05-24	% Change 31-05-23 to 31-05-24	Total % change since 31-05-23
Childminders	-5.6%	+3.3%	-2.5%
Day-care	-1.2%	-7.1%	-8.3%
Holiday	+11.3%	-11.0%	-1.0%

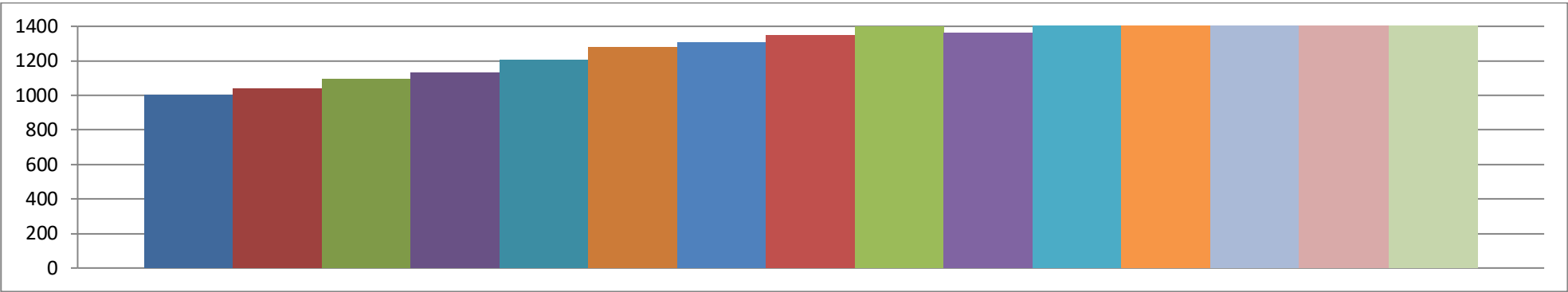
Births

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Number of Births	1109	1105	1074	1065	1072	997	982	1038	1032	1001



Population

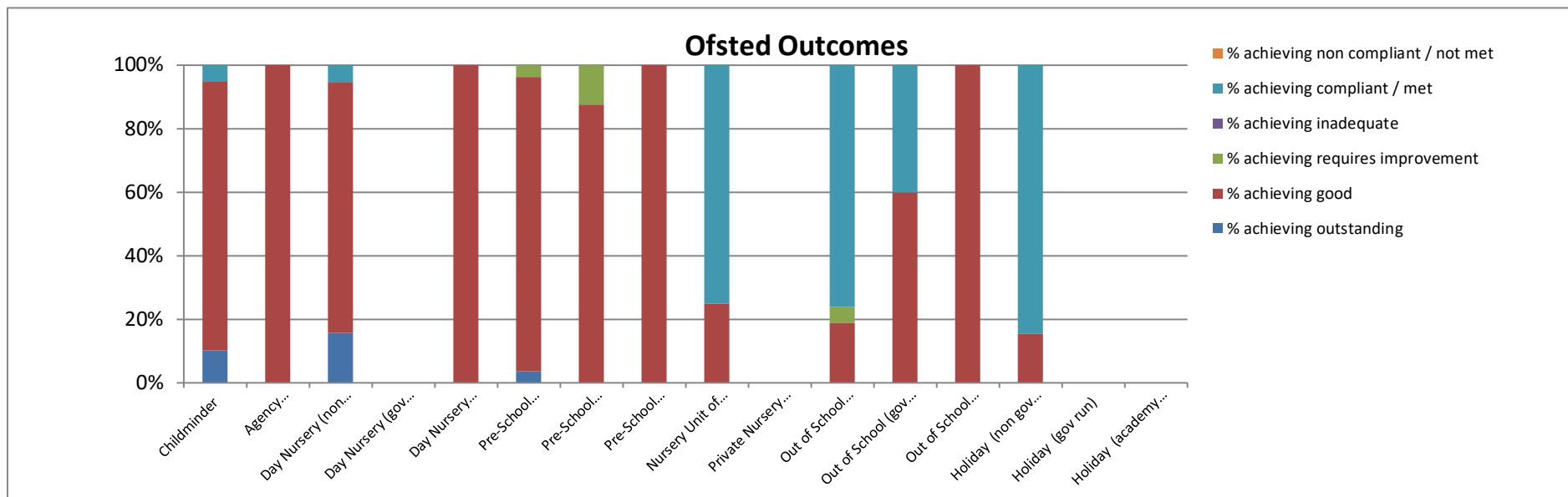
Population (Source: GP Data 2024)														
0 years	1 Years	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years	10 years	11 years	12 years	13 years	14 Years
1001	1039	1091	1128	1205	1278	1303	1348	1395	1362	1412	1481	1581	1520	1591



Childcare Provision

	No of providers	No of registered places	No & % achieving outstanding	No & % achieving good	No & % achieving requires improvement	No & % achieving inadequate	No % achieving compliant / met	No % achieving non-compliant / not met
Childminders	45	294	4 (10.3%)	33 (84.6%)			2 (5.1%)	
Agency Childminders	9	55		3 (100%)				
Day Nursery (non gov run)	22	856	3 (15.8%)	15 (78.9%)			1 (5.3%)	
Day Nursery (gov run)								
Day Nursery (academy trust gov run)	2	46		1 (100%)				
Pre-School Playgroup (non gov run)	27	742	1 (3.7%)	25 (92.6%)	1 (3.7%)			
Pre-School Playgroup (gov run)	10	203		7 (87.5%)	1 (12.5%)			
Pre-School Playgroup (academy trust gov run)	4	108		3 (100%)				
Nursery Unit of Independent Schools	4	110		1 (25.0%)			3 (75.0%)	
Private Nursery School								
Out of school (non gov run)	27	557		4 (19.0%)	1 (4.8%)		16 (76.2%)	
Out of School (gov run)	10	206		3 (60.0%)			2 (40.0%)	
Out of School (academy trust gov run)	4	72		4 (100%)				
Holiday (non gov run)	17	404		2 (15.4%)			11 (84.6%)	
Holiday (gov run)								
Holiday (academy trust gov run)								

NB: Totals will not always add up as some settings will be awaiting an Ofsted outcome and some governor run settings will come under schools Ofsted.

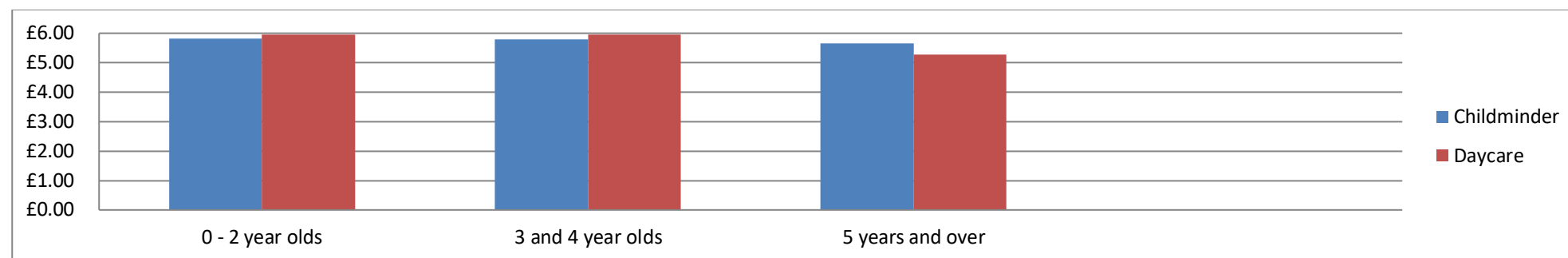


Childcare Offer

	Reg for 2-year funding	Reg for 3-and 4-year funding	Offering 30 hours	Offers childcare before 8am weekday	Offers childcare after 6pm weekday
Childminder	46	48	47	24	4
Day-care	62	68	65	5	2

Costs

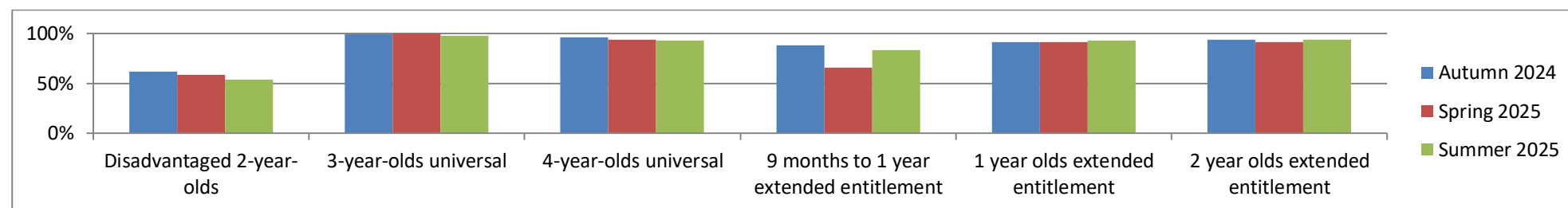
	0 - 2-year-olds	3- and 4-year-olds	School aged children, 5 years and over
Childminder	£5.82	£5.79	£5.65
Day-care	£5.95	£5.95	£5.28



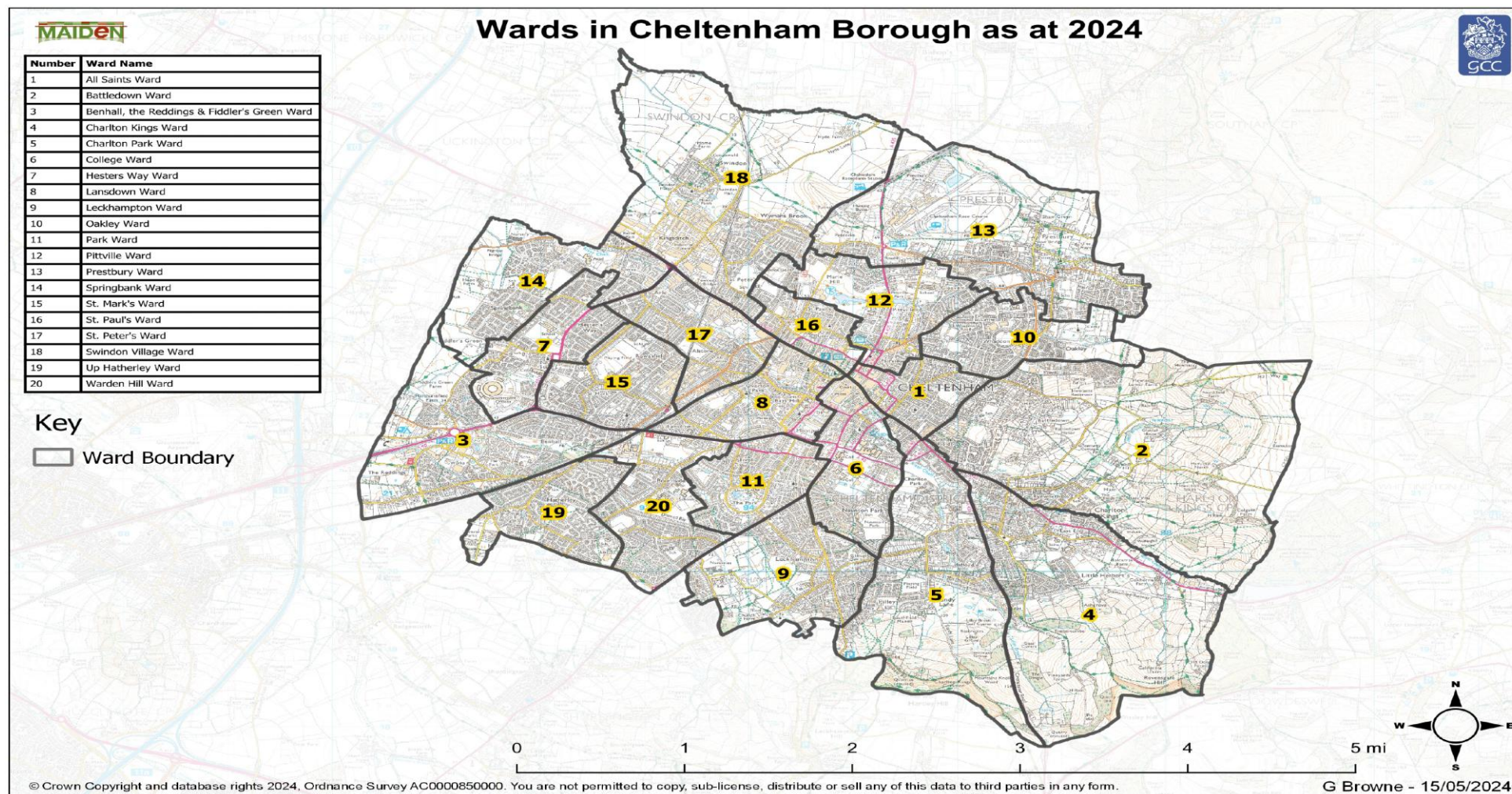
Funding

	Autumn 2024	Spring 2025	Summer 2025
Disadvantaged 2-year-olds	62.1%	58.9%	54.0%
3-year-olds universal	99.2%	100%	98.0%
4-year-olds universal	95.8%	93.8%	93.0%
9 months to 1-year extended entitlement	88.1%	65.9%	83.7%
1-year olds extended entitlement	91.3%	91.3%	93.2%
2-year-olds extended entitlement	93.9%	91.4%	93.5%

* Take up of the extended entitlement is measured by the number of issued entitlement codes that have been validated by an early years provider



Cheltenham

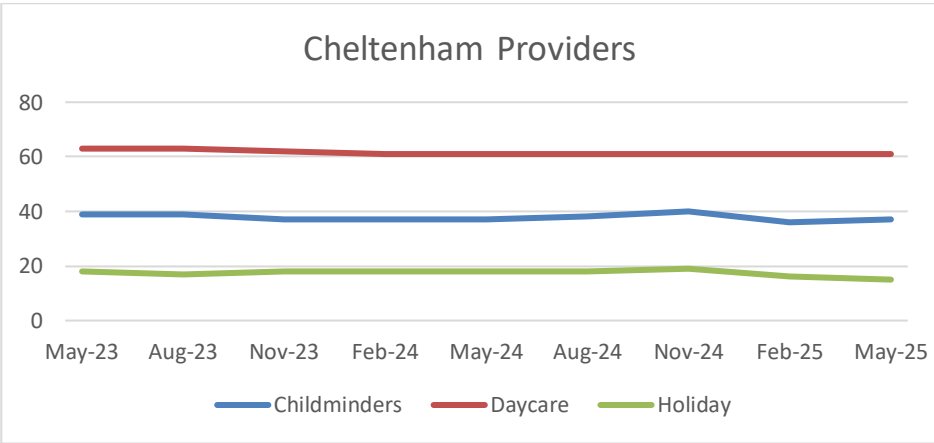


Change in providers and places since last sufficiency report

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there was no change in the number of early years' providers and a 4.7% (132) increase in the overall number of places. For Holiday providers there has been a 16.7% (3) decrease in providers and a 12.4% (68) decrease in places. Based on birth data and provider data available the Hester's Way planning area birth data versus places available shows the biggest predicted shortfall of childcare places however some local providers report low occupancy and available places at their provision. Hatherley / Leckhampton area are also identified as an area in need of close monitoring. Whilst we are not aware of any children for whom a childcare place is not available, local intelligence reports that the Charlton Kings area is an area where demand is high and more places may be required. This may be attributed to parents choosing to wait for places at a particular provision despite places being available elsewhere, rather than a situation where there is a shortage of places available. We anticipate that there will be a further shortfall of places across some areas of the locality once the new Early Years Entitlements increase to 30 hours from September 2025 and we will continue to work with childcare providers and GCC colleagues to support the development of additional childcare places in these areas as demand dictates. Within the Charlton Kings area we have been working with several providers to increase their provision for wraparound childcare and this has also included some providers expanding their operating hours for early years which is better supporting working parents.

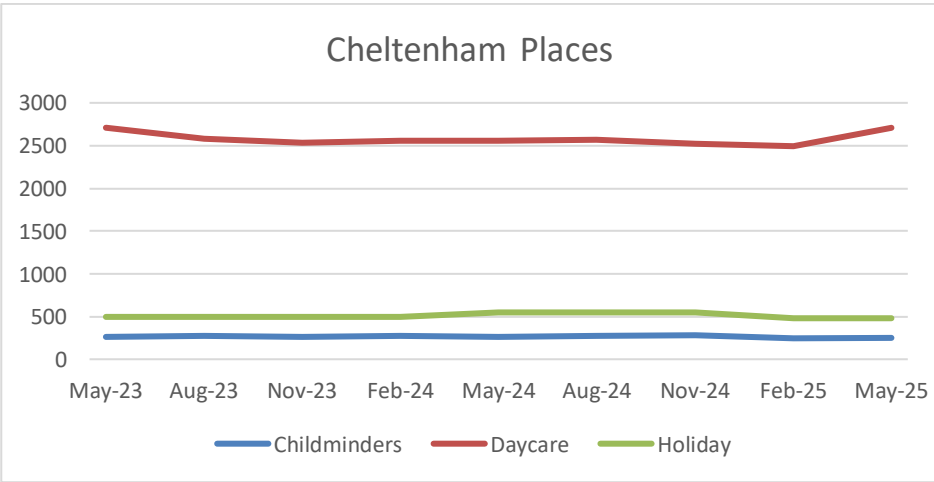
Change in provider numbers yearly comparison

The Following graphs show the total number of providers and places available since the end of May 2023. The data is as at the end of the month.



	% Change 31-05-23 to 31-05-24	% Change 31-05-23 to 31-05-24	Total % change since 31-05-23
Childminders	-5.1%	0.0%	-5.1%
Day-care	-3.2%	0.0%	-3.2%
Holiday	0.0%	-16.7%	-16.7%

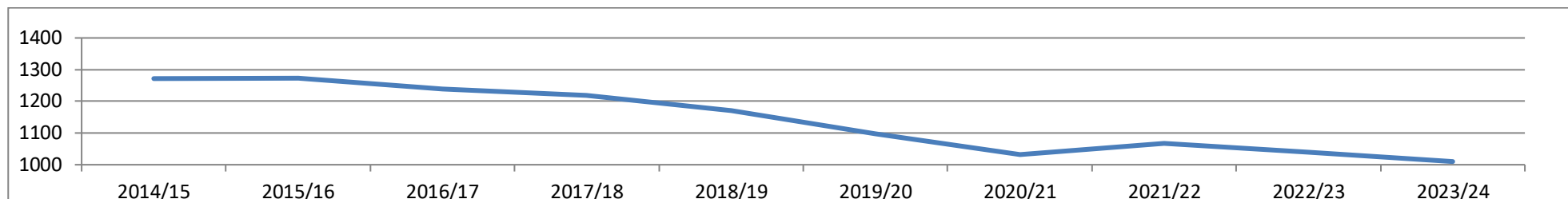
Change in places yearly comparison



	% Change 31-05-23 to 31-05-24	% Change 31-05-23 to 31-05-24	Total % change since 31-05-23
Childminders	0.0%	-5.7%	-5.7%
Day-care	-5.3%	+5.7%	+0.1%
Holiday	+10.9%	-12.4%	-2.8%

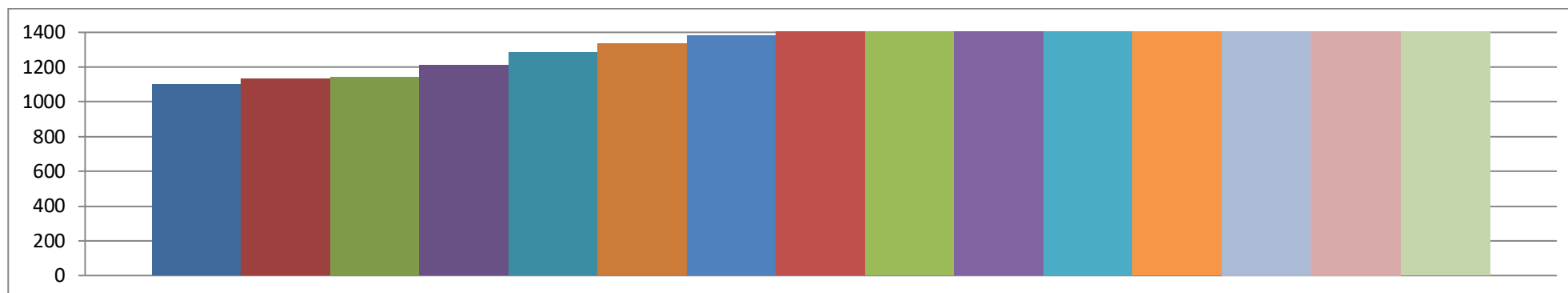
Births

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Number of Births	1271	1273	1238	1219	1172	1098	1032	1068	1040	1010



Population

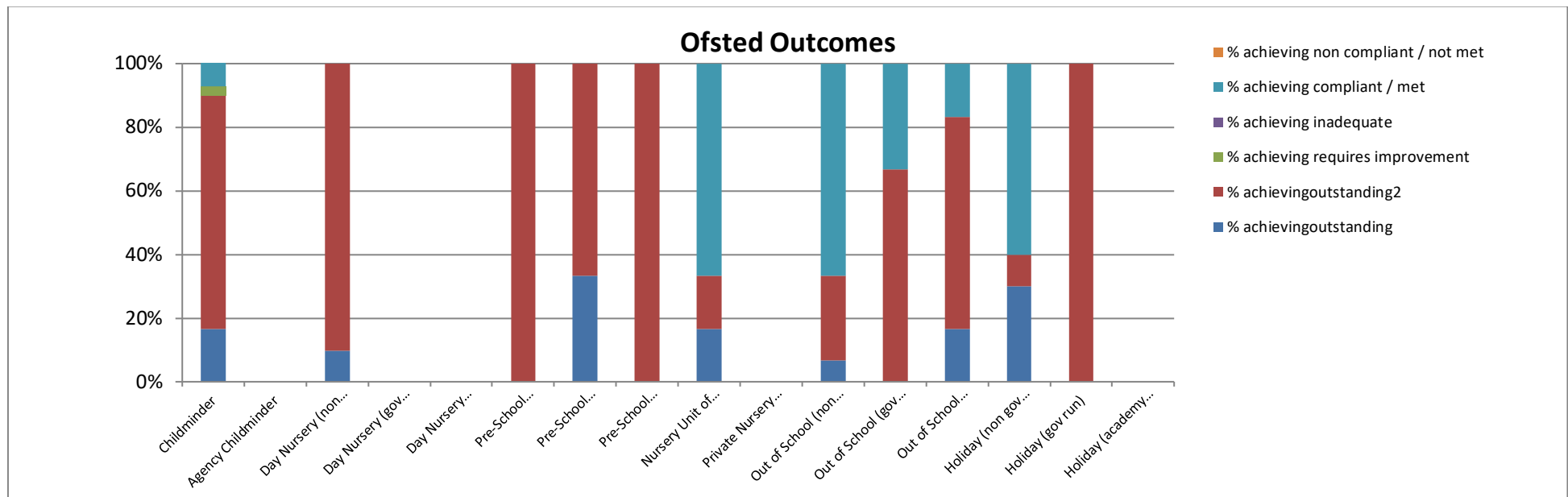
Population (Source: GP Data 2024)														
0 years	1 Years	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years	10 years	11 years	12 years	13 years	14 Years
1101	1130	1138	1208	1281	1335	1380	1422	1441	1447	1508	1502	1526	1517	1451



Childcare Provision

	No of providers	No of registered places	No & % achieving outstanding	No & % achieving good	No & % achieving requires improvement	No & % achieving inadequate	No & % achieving compliant / met	No & % achieving non-compliant / not met
Childminders	34	239	5 (16.7%)	22 (73.3%)			3 (10.0%)	
Agency Childminders	3	11						
Day Nursery (non gov run)	35	1832	3 (9.7%)	28 (90.3%)				
Day Nursery (gov run)								
Day Nursery (academy trust gov run)								
Pre-School Playgroup (non gov run)	15	403		15 (100%)				
Pre-School Playgroup (gov run)	3	91	1 (33.3%)	2 (66.7%)				
Pre-School Playgroup (academy trust gov run)	2	56		2 (100%)				
Nursery Unit of Independent Schools	6	326	1 (16.7%)	1 (16.7%)			4 (66.6%)	
Private Nursery School								
Out of school (non gov run)	20	840	1 (6.7%)	4 (26.7%)			10 (66.6%)	
Out of School (gov run)	8	228		2 (66.7%)			1 (33.3%)	
Out of School (academy trust gov run)	1	32	1 (16.7%)	4 (66.6%)			1 (16.7%)	
Holiday (non gov run)	14	456	3 (30.0%)	1 (10.0%)			6 (60.0%)	
Holiday (gov run)	1	24		1 (100%)				
Holiday (academy trust gov run)								

NB: Totals will not always add up as some settings will be awaiting an Ofsted outcome and some governors run settings will come under schools Ofsted.

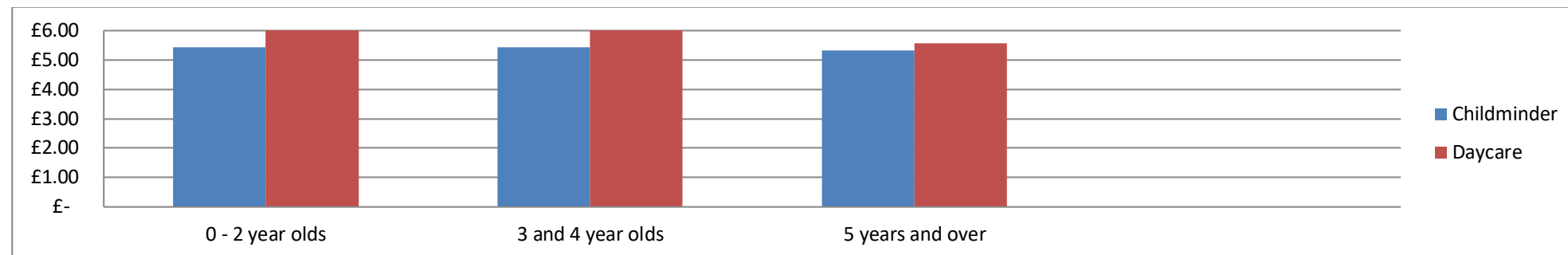


Childcare Offer

	Reg for 2-year funding	Reg for 3-and 4-year funding	Offering 30 hours	Offers childcare before 8am weekday	Offers childcare after 6pm weekday
Childminder	26	29	28	22	7
Day-care	53	60	56	8	3

Average Costs

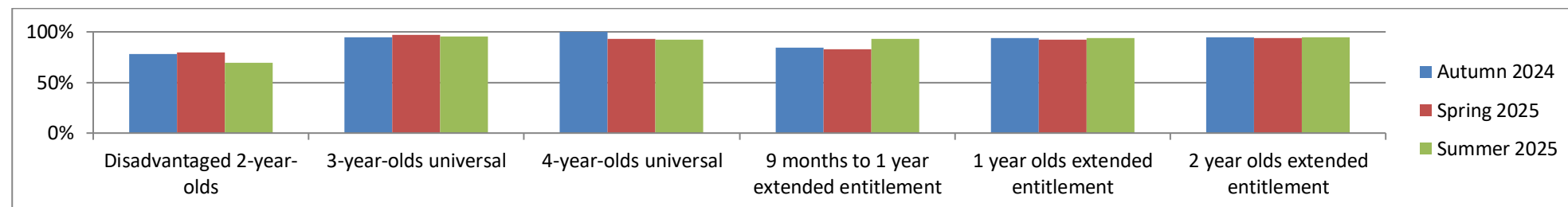
	0 - 2-year-olds	3- and 4-year-olds	School aged children, 5 years and over
Childminder	£5.44	£5.44	£5.33
Day-care	£6.96	£6.14	£5.56



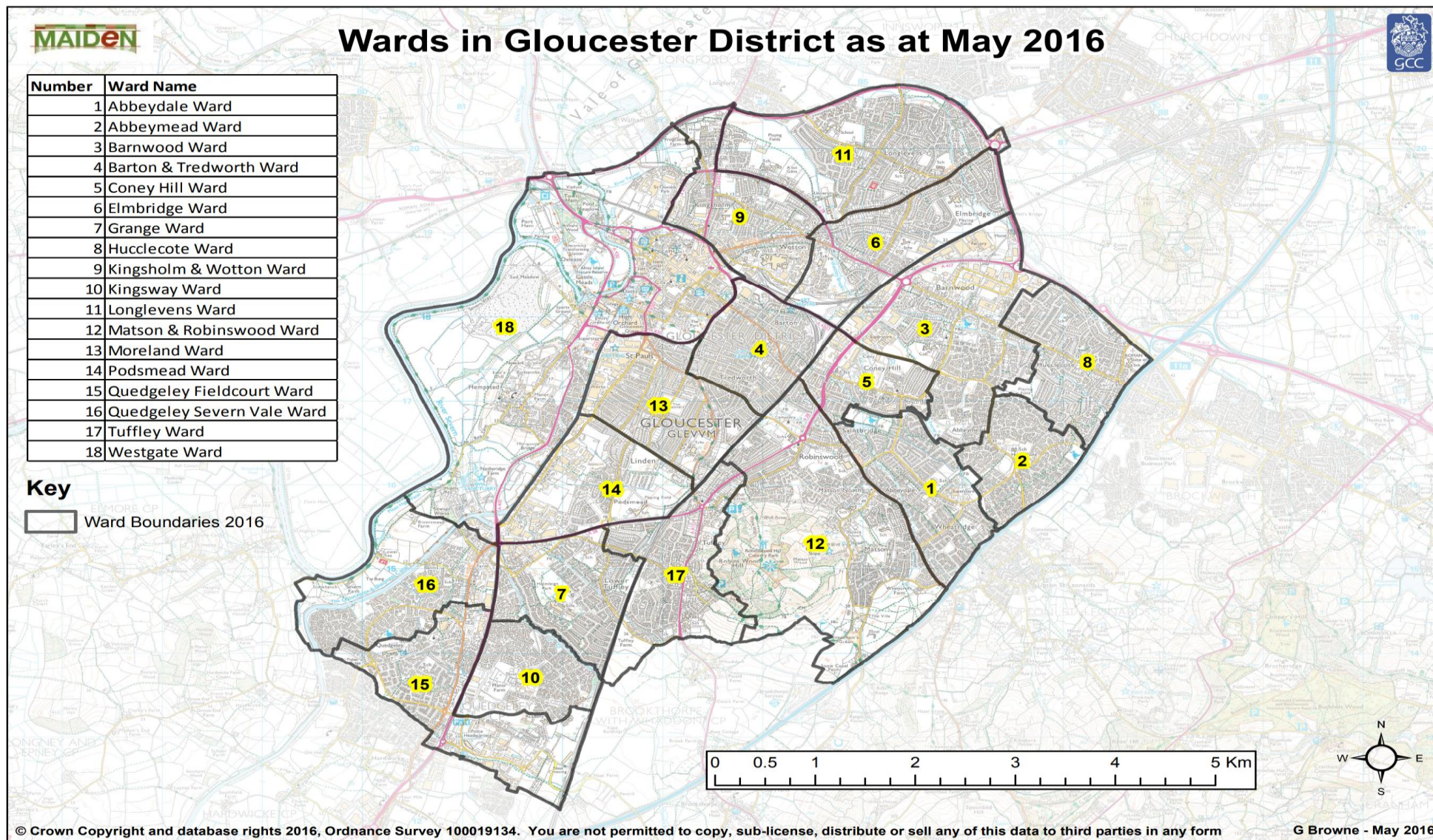
Funding

	Autumn 2024	Spring 2025	Summer 2025
Disadvantaged 2-year-olds	77.8%	79.8%	69.4%
3-year-olds universal	94.4%	97.0%	95.3%
4-year-olds universal	99.9%	92.7%	92.1%
9 months to 1-year extended entitlement	84.3%	83.0%	93.1%
1-year olds extended entitlement	94.2%	91.9%	93.9%
2-year-olds extended entitlement	94.9%	93.9%	94.9%

* Take up of the extended entitlement is measured by the number of issued entitlement codes that have been validated by an early years provider



Gloucester

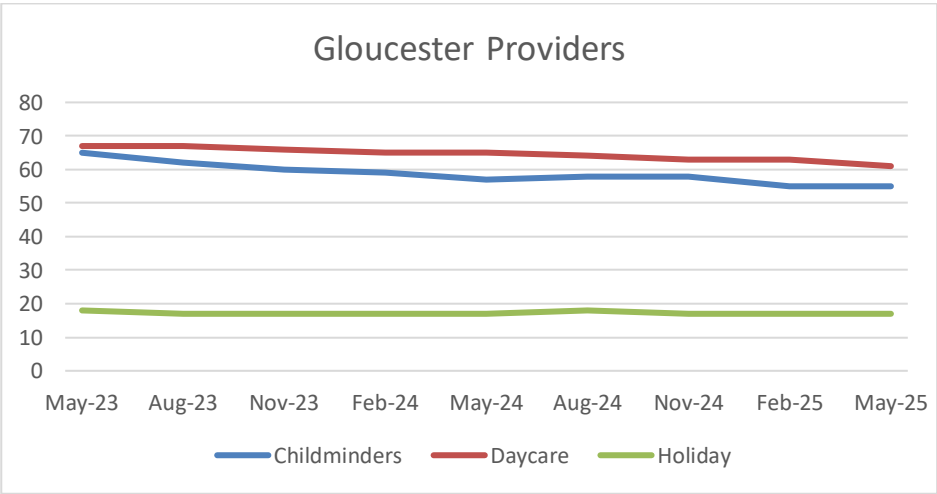


Change in providers and places since last sufficiency report

Since the data in the previous sufficiency report (end May 2024) to the end of May 2025 there has been a 4.9% (6) decrease in the number of early years' providers and a 3.5% (115) decrease in the overall number of places. For Holiday providers there has been no change in the number of providers and a 3.5% (20) decrease in places. Abbey, Matson & Upton, Quedgeley Southeast and Tuffley continue to show a predicted shortfall of childcare places. We continue to work with childcare providers and GCC colleagues to support the development of additional childcare places in these areas as demand dictates. We anticipate that there will be a further shortfall of places across some areas of the locality once the new Early Years Entitlements increase to 30 hours from September 2025.

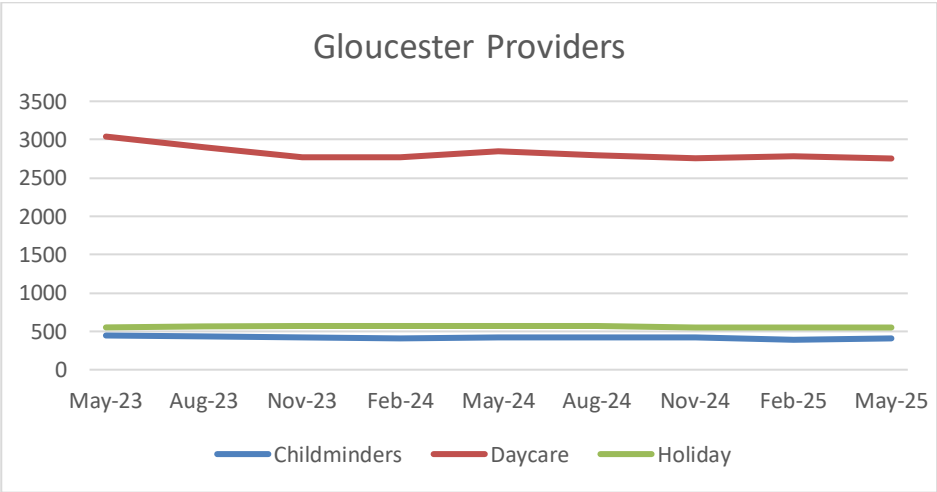
Change in provider numbers yearly comparison

The Following graphs show the total number of providers and places available since the end of May 2023. The data is as at the end of the month.



	% Change 31-05-23 to 31-05-24	% Change 31-05-23 to 31-05-24	Total % change since 31-05-23
Childminders	-12.3%	-3.5%	-15.4%
Day-care	-3.0%	-6.2%	-9.0%
Holiday	-5.6%	0.0%	-5.6%

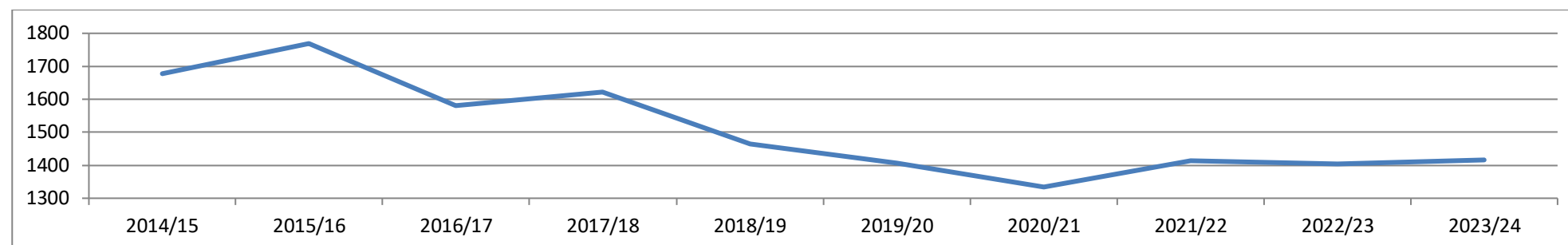
Change in places yearly comparison



	% Change 31-05-23 to 31-05-24	% Change 31-05-23 to 31-05-24	Total % change since 31-05-23
Childminders	-6.1%	-4.1%	-9.9%
Day-care	-6.2%	-3.4%	-9.4%
Holiday	+2.9%	-3.5%	-0.7%

Births

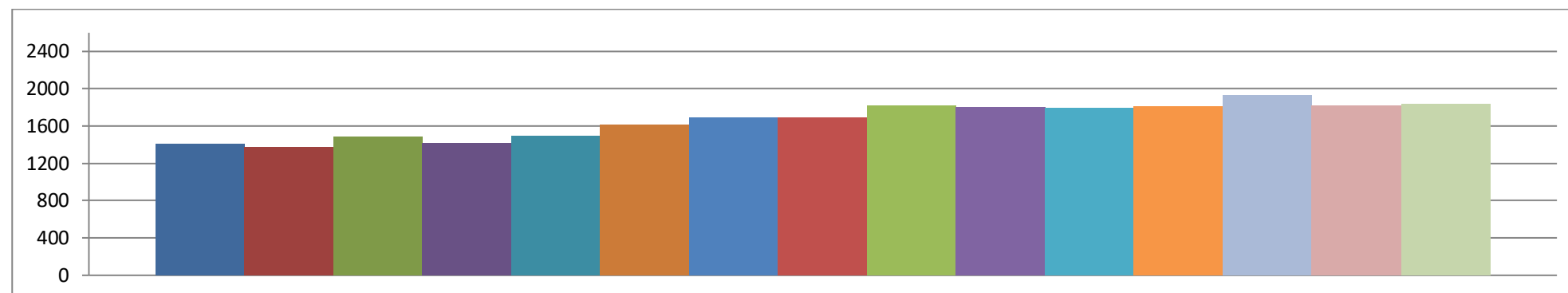
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Number of Births	1677	1769	1580	1621	1464	1407	1334	1413	1403	1416



Gloucester is the only area in the county to see numbers of births remain static

Population

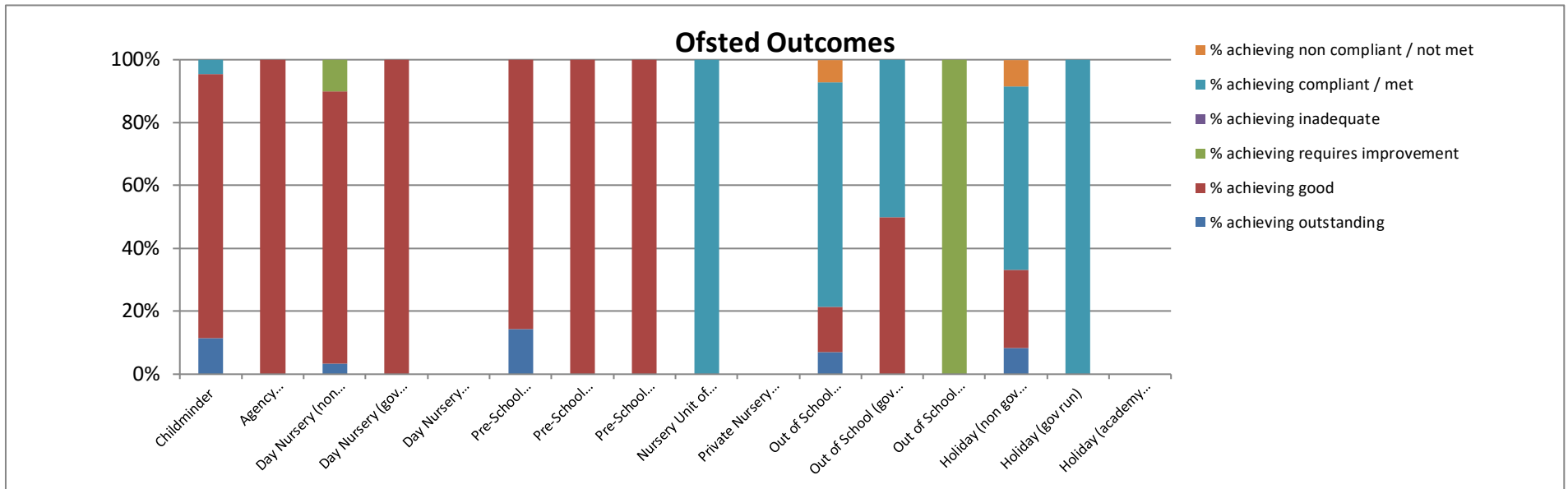
Population (Source: GP Data 2024)														
0 years	1 Years	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years	10 years	11 years	12 years	13 years	14 Years
1416	1374	1487	1423	1498	1613	1686	1690	1811	1795	1787	1807	1926	1813	1835



Childcare Provision

	No of providers	No of registered places	No & % achieving outstanding	No & % achieving good	No & % achieving requires improvement	No & % achieving inadequate	No & % achieving compliant / met	No & % achieving non-compliant / not met
Childminders	46	348	5 (11.4%)	37 (84.1%)			2 (4.5%)	
Agency Childminders	9	54		1 (100%)				
Day Nursery (non gov run)	31	1761	1 (3.3%)	26 (86.7%)	3 (10.0%)			
Day Nursery (gov run)	1	24		1 (100%)				
Day Nursery (academy trust gov run)								
Pre-School Playgroup (non gov run)	14	479	2 (14.3%)	12 (85.7%)				
Pre-School Playgroup (gov run)	5	124		4 (100%)				
Pre-School Playgroup (academy trust gov run)	8	286		5 (100%)				
Nursery Unit of Independent Schools	2	80					2 (100%)	
Private Nursery School								
Out of school (non gov run)	19	947	1 (7.1%)	2 (14.3%)			10 (71.4%)	1 (7.1%)
Out of School (gov run)	6	190		1 (50.0%)			1 (50.0%)	
Out of School (academy trust gov run)	3	74			1 (100%)			
Holiday (non gov run)	14	446	1 (8.3%)	3 (25.0%)			7 (58.3%)	1 (8.3%)
Holiday (gov run)	3	104					1 (100%)	
Holiday (academy trust gov run)								

NB: Totals will not always add up as some settings will be awaiting an Ofsted outcome and some governors run settings will come under schools Ofsted.

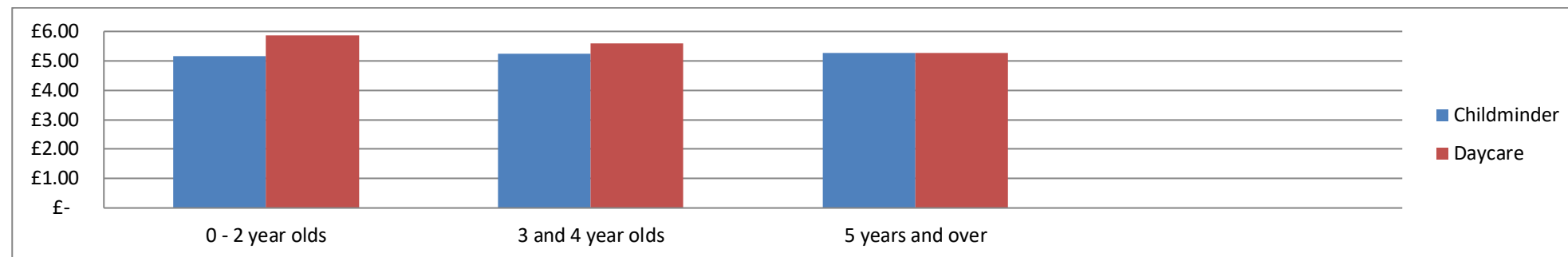


Childcare Offer

	Reg for 2-year funding	Reg for 3- and 4-year funding	Offering 30 hours	Offers childcare before 8am weekday	Offers childcare after 6pm weekday
Childminder	46	46	47	30	4
Day-care	53	59	55	14	2

Average Costs

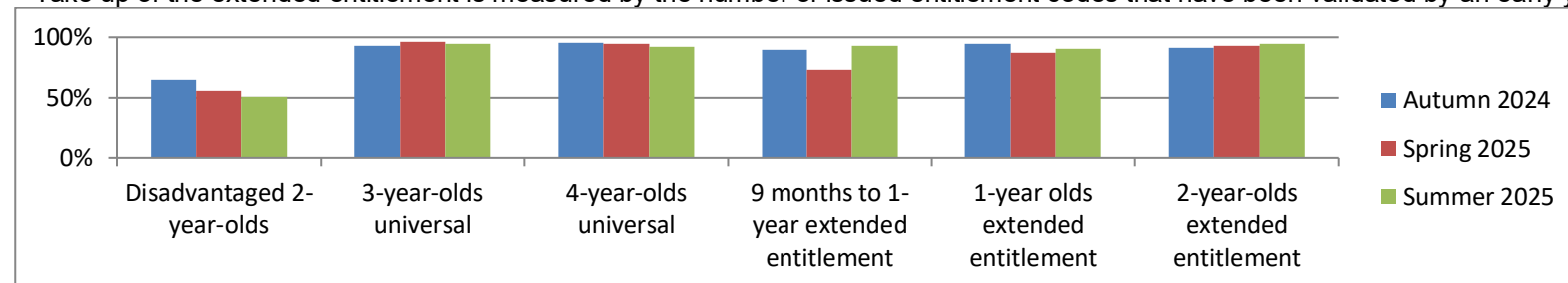
	0 - 2-year-olds	3- and 4-year-olds	School aged children, 5 years and over
Childminder	£5.15	£5.23	£5.28
Day-care	£5.86	£5.59	£5.26



Funding

	Autumn 2024	Spring 2025	Summer 2025
Disadvantaged 2-year-olds	64.6%	55.9%	50.5%
3-year-olds universal	92.8%	96.4%	94.6%
4-year-olds universal	95.8%	94.5%	91.9%
9 months to 1-year extended entitlement	90.0%	73.3%	93.3%
1-year olds extended entitlement	94.3%	87.2%	90.5%
2-year-olds extended entitlement	91.5%	93.2%	94.4%

* Take up of the extended entitlement is measured by the number of issued entitlement codes that have been validated by an early years provider



The Budget in March 2023 announced a range of measures to support education and help parents with childcare so they can return to work more easily.

In the Governments' Budget announcements, the Chancellor set out large scale childcare reforms to increase availability, reduce costs and increase the number of parents using childcare.

Childcare plays a vital role in enabling parents to work and supporting children's early development, which in turn improve economic growth

Affordable childcare improves economic growth by increasing parents' access to paid work, including lone parents and secondary earners

Flexible childcare also improves progression and hours worked, expanding the jobs that parents can access.

This is particularly important for mothers, whose employment rates and pay are disproportionately impacted by parenthood.

The early years are also a critical period for children, improving a child's early development and later outcomes, as well as closing the disadvantage gap early on.

These reforms are being introduced in stages:

AUTUMN 2023	Childminder grants become available. Invest £204m into 3/4yo and 2yo funding rate. Staff: child 2yo ratio change
APRIL 2024	15hrs for eligible working parents of 2-year-olds introduced. Invest £288m into 3/4 yo and 2 yo funding rates.
SEPTEMBER 2024	National wraparound support begins. 15hrs for eligible working parents of children 9 months plus introduced.
SEPTEMBER 2025	30hrs for eligible working parents of children from 9 months to primary school age introduced.
SEPTEMBER 2026	All schools able to offer 8am-6pm wraparound on their own or in partnership.

- Eligible working parents in England will be able to access 30 hours of free childcare per week, for 38 weeks of the year (although parents can use fewer hours over more weeks of the year), from when their child is 9 months old to when they start school. (This will depend on the business model offered by individual providers as some operate Term time only)
- The government will also substantially uplift the hourly rate paid to providers to deliver existing free hour offers. This will provide £204m of additional funding this year, increasing to £288m by 2024-25. The amount of additional funding each Local Authority receives is yet to be confirmed and therefore, yet we are unable to confirm these rates with providers.

The childcare reforms focus very much on “childcare” rather than early education. It is important to note the difference and the potential impacts of each. Whilst childcare will enable parents to return to paid employment, it is the quality of early education that the child receives in the childcare setting that impacts on their development and their readiness for learning as they enter school.

There are several impacts and challenges for the EY sector and the LA to consider when planning for and implementing the reforms and particularly the expansion of the childcare offer.

1. Expansion of the 30-hour childcare offer

Impact and challenges for the LA and EY sector

- Increased demand for childcare places potentially poses a challenge to the LA Childcare sufficiency duty.
- The EY sector, both national and locally, are already reporting significant staff recruitment and retention challenges, forcing many to close some of their rooms and in some cases the whole provision.
- Potential impact on the quality of EY provision given providers continue to be clear that the funding attached to entitlements does not meet actual costs, income will be lost through DSG (Dedicated Schools Grant) funding replacing private fees at a lower hourly rate, and impact that increased staffing ratios may have on quality, especially for more vulnerable children/children with additional needs.
- Impact for the EY Quality & Inclusion teams and the Sufficiency and Business teams (including funding administration team) - More children accessing EY settings may add pressure to EY resources, more settings to provide support to (Quality, Inclusion and SEND, Business support, training etc.) More staff needed to support more settings and more children.

An increase in demand for Early Years business support to enable settings to implement changes to business models, increased capacity requirements to meet sufficiency needs will require additional staff in the EY Business Support team.

- An increase in EY funding claims will require additional staff in EY Funding team.
- Potential increase in number of children with SEND in EY settings in need of support, training, and resources – including an increase in Inclusion funding requests.
- The current 2-year-old offer is targeted, so we promote the offer to that cohort to ensure they do not miss out. When the free entitlements offer is expanded to all 2-year-olds, will we lose focus on the disadvantaged cohort? Will providers be less willing to accept them if other parents can offer top up funding? This will add further to inequalities and our concerns about school readiness.
- Potentially more requests for EHCNA for younger children as needs are identified early if child is accessing a childcare/early education setting.

2. Additional LA funding for extra wrap-around childcare

The government will invest £289m over two academic years, from Sept 2024, to enable schools and local areas set up wraparound childcare provision. This funding is to ensure 75% of all primary schools within the Local Authority will have wraparound childcare for children aged from reception to year 6, 8am to 6pm Monday to Friday during term time. The estimated shortfall of places for us was 2039 which need to be created by September 2026. To date we have now approved funding for 55 providers of wraparound care expanding or creating 1090 places that will be up and running by September 2025. These figures mean that we have now got wraparound care in approximately 63% of our schools and we have created 53% of the total number of places needed with a year of the programme left to run. We are on target to meet the

goals of this project by September 2026 to expand the availability of childcare to better support parents who are working or may wish to work longer hours.

This is the first step in the government's ambition for all parents of primary school children who need it to access childcare in their local area from 8am –6pm. All schools to offer wrap-around care from 8am to 6pm, either on their own or in partnership with other schools. The ambition is to have this in place by September 2026 and for LAs (Local Authorities) (Local Authority) to take responsibility for the implementation and oversight of this element of the reform.

- This funding will be for schools and local authorities to introduce or expand childcare provision on either side of the school day and enable them to assess flexible ways of providing childcare and gather evidence of what works.
- The government expects that most schools will be able to deliver wraparound childcare that is self-financing and sustainable by September 2026.
- Some schools are already delivering wraparound services by using local partners such as local childminders who provide this service for them.

Impact and Challenges

The wraparound proposal raises several questions around capacity to deliver in already over stretched primary schools.

Nationally there are reports that childminders see this as a threat to the service they already provide and unsuitable for children who need a calmer setting. There is no confirmation yet, but it has been reported that the funding scheme will only last two years after which schools will be expected to cover costs themselves. This is likely to present

challenges to an already over stretched and pressured primary education system.

Consideration needs to be given to how the LA will support this development and fulfil the LA duty to implement and provide oversight of this element of the reform.

3. Changes in adult to child ratios

The Government has decided to move ahead with changes to adult-to-child ratios. The change from 1:4 to 1:5 for two-year-olds aligns with Scotland, and the government has said they will consult on further measures to improve flexibility for providers. This policy change is effective from September 2023.

- Government will proceed with changing staff: child ratios from 1:4 to 1:5 for two-year-olds in England to align with Scotland and bring the UK in line with other countries.
- These will be new statutory minimums. Providers will continue to decide the staffing levels to meet the needs of the children in their care.
- This change will come in from September 2023
- Changing minimum staff: child ratios will give providers greater flexibility over how they run their businesses.
- The EYFS will clarify that childminders can care for more than the specified maximum of three children under the age of 5 if they are caring for siblings of children they already care for (rather than just 'babies'), or if the childminder is caring for their own baby or child (rather than just 'baby').
- Government will proceed with changing the EYFS to make explicit that "adequate supervision" while children are eating means that children must be in sight ***and*** hearing of an adult.

Impact and challenges

The change to ratios has been badged as a remedy to the cost-of-living crisis, reducing statutory staffing levels which in turn will impact on reduced childcare costs for parents. However, the general feeling of the EY sector is that this plan risks compromising children's the quality of education and care that children receive at a time when they need more individual care and attention than ever, not to mention putting their basic safety and wellbeing in jeopardy.

This will potentially add further pressure on the early years workforce, driving even more highly skilled educators away from the sector, at a time when the early years is already struggling with the worst recruitment and retention crisis in recent history.

Professional Association of Childcare and Early Years (PACEY) and other EY sector support organisations continue to work with the Government to better understand and communicate the implications of the policy change for children and early years professionals.

Gloucestershire EY providers also report concerns and very few have advised that they will amend their ratios due to fears that this will compromise the quality, safety, well-being, and development of children in their care.

At a time when EY settings are identifying a growing number of children with additional needs and SEN, the need is for more funding to increase staffing levels to facilitate appropriate support rather than to decrease this.

Where settings decide to adopt new ratios, this has potential to force an increase in requests for additional GCC advice and funding to support children with additional needs and SEN.

Special Educational Needs and Disabilities (SEND)

It is difficult to understand fully if we have sufficient childcares for all children with SEND there being no specific assessment for this group. However, it is essential to further examine the needs of this group to ensure there is sufficient and appropriate early years and childcare provision, both to support parental employment and to provide learning and development opportunities and subsequently to improve outcomes and reduce inequalities. To address this the Early Years & Childcare Service has been working with a national organisation to explore ways in which we can specifically assess demand and supply of EY provision for children with SEND.

Since the Autumn term of 2024, early years settings have been contacted to gather a range of information related to sufficiency including how many children with SEND access the setting and how the provider plans to meet the needs of these children. 75% of the settings contacted stated that they currently have children with SEND on roll, including children that are supported through My Plans/My Plan+/EHCPs.

Most early years providers in the county report an increased number of children with SEND accessing places; many early years settings would like to offer more places, however 67% of the providers contacted are already full, with waiting lists.

Some early years providers report that they have had to limit the number of places offered to children with SEND due to challenges with the recruitment of additional staff to provide the extra support needed for these children. Some childminders report that whilst they recognise that a home-based environment with fewer children may support some children with SEND better than a larger provision, this can be difficult to

deliver as many are working alone and therefore do not have the capacity to meet the additional needs of these children

All teams in the EY&CC Service discuss SEND sufficiency with EY providers during their respective support visits. Providers are supported to include consideration of the needs of the children in their community as part of their annual business planning. This helps them to specify how many places they can offer for children with SEND/additional support needs and subsequently to plan staff ratios and allocation of resources accordingly. Resources to support providers to business plan for SEND are being developed by the EY Service. Collation of this data will enable the Council to calculate the total number of childcare places specifically planned and available for children with SEND/additional support needs, comparing this with estimated SEND place demand.

Childcare and early years education for children with SEND is available in Gloucestershire, both within mainstream provision and in 2 commissioned specialist EY centres offering early years' places where this has been assessed as appropriate to meet the needs of the child.

The local authority provides a range of support and training across the entire childcare sector to support the inclusion of children with additional needs and SEND. This includes training and advice to support the early years market to deliver high quality, inclusive childcare and early education for children with SEND.

The Children and Families Act 2014 requires each Local Authority to produce and publish a Local Offer which sets out, in one place, information about provision available across education, health and social care for children and young people in the area, who have special educational needs or are disabled.

In addition to setting out in our local offer what is expected to be provided as "ordinarily available" in our early years settings, we have introduced a model of support focusing on quality, inclusion and child development/SEND to ensure that children with additional needs and

SEND can be welcomed, included and make progress in their early years setting by confident, knowledgeable and skilled staff.

This starts with a focus on providers delivering high quality provision and fulfilling all statutory duties, thus ensuring a solid base of good practice. Providers are also offered a range of inclusion support and training to provide a safe and inclusive environment delivered by a staff team with the skills, confidence and quality of practice to meet the needs of all their children. For children with more complex needs our local offer includes individualised support including access to Inclusion Funding to address both emerging and longer-term needs. Further details of our local offer for children with SEND can be found on the Early Years area of the GCC website.

<https://www.gloucestershire.gov.uk/early-years-service/>

The Early Years' Service has encouraged all registered childcare providers to have individual versions of the local offer, which outlines how they support children with special educational needs or disability. This document should be made available to parents and published on the provider's and each Local Authorities' website. We are aware that many providers are still yet to publish their local offer; we are working with these providers to support the development of their offer.

Parents of children with SEND are encouraged to contact the Early Years service if they are unable to find childcare provision to meet their child's needs.

The EY and Childcare service are becoming increasingly aware of the growing number of children with SEND that are currently not accessing their full entitlement of early education/childcare. Providers report that challenges in recruiting additional staff members impacts on their ability to meet the additional support needs of some children.

Due to the additional advice, training, and resources available to all EY providers, most children can access their entitlement of EY provision in a mainstream setting. However, for some children with complex needs

an environment offering a more specialist approach is required to facilitate a robust assessment and understanding of individual needs to inform planning for the next stage of education. Following the successful delivery of an EY SEN pilot in 2022 we commissioned Dingley's Promise to deliver 2 specialist centres, providing specialist childcare, assessment, and outreach provision in Gloucester and Cheltenham.

The centres provide the following:

- Childcare entitlement for eligible children, whose needs cannot be met in mainstream provision.
- Facilitate multi-agency assessments and evidence-based interventions to support child development.
- Inform planning for the next stage of the child's education.
- Provide an outreach service to support successful transitions to the child's next setting.

The core purpose of an Assessment Provision is to:

- Ensure that all children can access their entitlement to early education.
- Improve outcomes for young children.
- Reduce inequalities between children in greatest need and their peers.

The pilot demonstrated that with the right support for children, parents and settings, children can transition to mainstream settings successfully, promoting educational inclusion, improved outcomes and ensuring specialist sufficiency is targeted for those where it is essential.

Methodology for the Sufficiency Assessment

- Birth data: GP Data 2024
- Population: GP Data 2024
- Supply of childcare: data provided by Ofsted, who regulate early years provision in schools and childcare provision.
- Quality of childcare: data provided by Ofsted, who regulate early years provision in schools and childcare provision.
- Childcare offer: collected from capita one early year's module.
- Costs of childcare: collected from capita one early year's module via early years portal.
- Funded early education: Headcount data provided by EY Funding team. Data on entitlement to a funded early education place for 2-year-olds is provided by the Department for Work and Pensions.
- Children with EHC plans: based on data held by our local authority.
- Data from Early Years contact calls

Overall sufficiency and Action Plan

At the present time, Gloucestershire has sufficient childcare to meet demand in some but not all, areas of the county.

Despite the significant challenges of the past few years, there is available provision in most place planning areas, but some specific localities are struggling to meet the demand for places, as set out in this report.

This assessment is based on available birth data, projections of future demand and information on available childcare provision in the county. All areas within the county will require close monitoring as the demand for childcare changes and as more parents return to the workplace.

We will need to continue to regularly review local provision as the introduction of the governments childcare reforms plans, announced in the Governments Spring Budget (March 2023) continue to be implemented particularly as the 30 hours funded childcare for families with babies from 9 months old (Sept 2025)

New housing development may require additional Early Years places to be provided to meet demand for childcare in these new housing areas.

Over the next 12 months the Early Years' Service will prioritise the following areas for development or implementation. This will further enhance our knowledge of sufficiency and management of the early year's market, as we strive to ensure continued sufficient high-quality childcare for all.

Early Years Childcare Market (Section 7, Childcare Act (2006))

- Continue to recruit and sustain a childminding market.
- Offer business support to all early years' providers including a business health check to support future sustainability.
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- Introduce a revised annual workforce data survey to identify areas for focused recruitment drives.
- Continue to liaise with schools to ensure the Local Authority has a full up-to-date data set of governors run early years' provision, including out of school and holiday care.
- Ensure data is collected from schools and childcare providers on the number of early year's places, out of school and holiday provision being offered.
- Implement agreed processes to deliver the Wraparound Childcare - National Pathfinder Scheme supporting all schools to be able to offer 8am to 6pm wraparound childcare on their own or in partnership with others.
- Continue to support all early years providers to deliver flexible 9month to 2-, 3- and 4-year-old nursery education funded places, as well as supporting the expansion and development of additional childcare places across all areas in line with the implementation of the extended childcare offer.
- Continue to ensure childcare is inclusive and meets the needs of children with special educational needs and disabilities by supporting providers to business plan for SEND, collating SEND data and encouraging settings to update and publish a Local Offer.
- Commission specialist SEND childcare and assessment provision where needed.
- Continue to develop systems and processes to monitor and assess demand and sufficiency of childcare for children with SEND.
- Promote early education entitlement for disadvantaged 2 year olds.
- Continue to provide a range of training and support to the EY and childcare sector to improve quality of inclusive practice.
- Promote the provider self-update portal to ensure data is available to assess childcare sufficiency and to ensure it is accessible to and meets the cultural needs of children from all ethnic backgrounds.
- Conduct specific consultation with parents from a range of ethnic backgrounds to understand if there are any barriers to accessing childcare provision and if there is consistent experience of settings understanding and responding to the cultural beliefs and needs of children from all ethnic backgrounds.

- Continue to monitor the impact of Academisation and plan to mitigate any identified risk to sufficiency and/or quality.
- Continue to audit Early Years premises across the county to identify settings potentially vulnerable to closure or future potential premises issues. Monitor this to ensure this does not jeopardise the sustainability of provision in future.
- Implement annual monitoring through an Early Years Business risk analysis across all Early Years provision in Gloucestershire to identify vulnerability with regards to future sustainability of settings. Continue to target settings identified for intensive business support including a full business health check.
- Further develop business training packages and toolkits to support the sector to remain sustainable.

Promotion of childcare options (Section 12, Childcare Act (2006))

- Further develop joined up working with the Family Information Service to improve information and signposting to maximise the ability for parents to identify and secure childcare.
- Liaise with the Family Information Service to discuss and improve data collection
- Liaise with the Family Information Service to ensure they promote to grandparents caring for grandchildren under 12years old, that they could qualify for National Insurance credits that can top up their income in retirement.
- Liaise with the Family Information Service to assist with parental survey – using social media where appropriate.
- Continue to Work with Job Centre Plus work coaches to promote return to work agenda and to identify parents citing childcare as a barrier to employment/training.
- Further develop work with local Schools and FE Colleges to promote Childcare and Education as a professional career path.

Two-year-old funding (Sections 1 & 2, Childcare Act (2016))

- Review current 2-year-old funding information and promotion of the offer, to ensure maximum impact and easy access to information for parents.
- Identify and contact parents of eligible 2-year-olds not taking up entitlement.
- Continue to further develop the work within the Early Education and Child Development Team, Social Care, Early Help Family Support, C&FCs and Health Visitor teams to promote the Disadvantaged 2-year-old offer.
- Maximise relationships with neighbouring authorities at regional meetings to share processes and identify good practice models.

Children open to social care and/or adopted children (Sections 1 & 2, Childcare Act (2016))

- Continue to build on existing relationships with Social Care and Health to ensure we have up to date information on take up of funded entitlements and how these partners can promote early years funding to parents who are eligible but not taking up their funded entitlements.
- Analyse data linked to the children aged 2-5 years who are open to social care.
- Analyse data linked the children aged 2-5 years who are adopted.
- Promote early years funding to these parents/carers not taking up their early years funded entitlement.

Self-Update portal (Section 6, Childcare Act (2006))

- Gather childcare sufficiency data collection through the self-update portal and bespoke surveys.
- Develop a support programme to enhance the use of the Self Update Portal (SUPP) and to promote the benefits to providers.

- The benefit of having this additional system includes:
 - A single system for collecting secure data, which will reduce administration duties for the Local Authority.
 - Empower early years and childcare providers to maintain information about their provision themselves (funded early years funded settings already use the system).
 - Enable the Local Authority to have more up-to-date information.
 - Allow parents to have access to the very latest information.

Mapping Project (Section 6, Childcare Act (2006))

- Work with the data team to carry out straight line distance exercise to determine if families use childcare close to home or work for 3- and 4-year-olds.
 - Early year's provision does not have catchment areas and families are free to access any setting they wish in the county and in neighbouring counties.
 - In some cases, due to travelling, a deficit of places could be turned into a surplus of places, particularly in more affluent areas where families are more mobile.
 - Develop an effective system to collect parental feedback regarding access to childcare and take up of funded places.

Trends and Forecasting (Section 6, Childcare Act (2006))

Continue to perform detailed trends and forecasting analysis based on:

- Population
- Number of early years providers and places
- Take up for 9 months, 2-, 3- and 4-year-olds.
- Increased demand for places linked to the extended childcare offer.
- Determine impact of 2-year funded children vs non funded children and Good Level of Development (GLD) in YR

School Place Planning Areas (Section 6, Childcare Act (2006))

- Perform detailed analysis based on above for each of the 44 School Place Planning Areas
- Continue to monitor and review local provision when considering new developments. New housing may require additional places to be provided to meet demand in those localities, section 106 funding should be considered for additional Early Years places as required.