Strong Early Years London

Impact Report

COPYRIGHT

CONTENTS

TABLES

1 Impact headlines

Strong Early Years London (SEYL) was a business support programme for the early years and childcare sector in London. Running from May 2021 to March 2022, its aim was to support private, voluntary and independent (PVI) early years providers (day nurseries, pre-schools, and childminders) with the business skills, knowledge and confidence needed to survive and thrive in the wake of the COVID-19 pandemic.

The programme was funded by the Mayor of London and commissioned by the Greater London Authority (GLA). The Early Years Alliance, a sector membership body, was appointed to coordinate the programme, and independent research agency CEEDA was appointed to evaluate programme impact.

The commissioned programme of support aimed to create and deliver a range of resources and support to help settings develop their business skills. These included:

- An online OSS, hosted on the London Business Hub website presenting all relevant information around business support from local authorities and training providers https://www.businesshub.london/early-years/
- On-line webinars and 'Business Connect' briefing sessions on a range of business topics. The programme also co-delivered sessions with local authorities.
- A telephone helpline operated by Early Years Alliance staff, providing a 'triage' service to evaluate needs and signpost to relevant support.
- Intensive consultancy support for individual providers on topics they identified as being most pressing. This included, amongst other resources, a 'budgeting toolkit' which enabled detailed financial budgeting and forecasting at setting level, supported by a specialist adviser.

Project delivery and reach

The project delivered a wide range of support and achieved good levels of engagement over a short time frame:

- The programme was promoted to 33 local authorities (including City) and childcare providers in all Local Authority areas were supported.
- 23 Local Authorities (including City) were actively involved in supporting the programme by providing information on their business support offer, promoting SEYL resources and/or hosting local SEYL surgeries.
- 43 online Business Connect workshops, 7 webinars and 16 Local Authority online surgeries were delivered.
- 1,344 London providers received support via attendance at the above events and/or 1-1 consultancy.
- Of these providers, 246 benefitted from intensive assistance via 1-1 consultancy or multiple events.
- 1,021 assisted providers were nurseries and pre-schools and 323 were childminders.

- Over one in ten (15%) of the capital's nurseries and pre-schools engaged directly with the project (figures exclude primary and maintained nursery schools), notably higher than take up amongst childminders (4%).
- At borough level, penetration was highest for non-domestic provision in the City of London (50% of settings), Croydon (29%) and Hammersmith and Fulham (27%).
- Hammersmith and Fulham also had higher levels of childminder engagement (21%) followed by Croydon and Lewisham at 9%.
- There was engagement in both affluent and deprived communities. Almost one in two nurseries and pre-schools participating in the programme were operating in deprived communities (49%), as were 59% of assisted childminders.
- Post-event video recordings attracted 2,128 unique views on YouTube.
- The online OSS attracted 1,788 unique page views.

Client satisfaction

Client satisfaction was tracked across the programme via post-event online surveys. Feedback on webinars (166 cases) and business connect sessions (196 cases) was very positive:

- The vast majority of participants agreed that: content was relevant and met expectations (95%), presenters were knowledgeable (97%), they enjoyed the session (96%) and would recommend it (96%).
- Each session had several objectives with most clients (ranging from 83% to 89% across all objectives) giving four or more stars for the extent to which these were met, using a 1-to-5-star scale.

Impact for project participants

SEYL support focused on financial forecasting, budgeting, marketing, governance, staff supervision and appraisal, recruitment, health and wellbeing and regulatory updates on inspection and the EYFS.

- The majority of clients accessing universal support said they had learned something new (93%) and would take actions as a result of the session (90%).
- Just over two thirds of respondents receiving universal support (250, 69%) gave open comment feedback on the nature of learning and actions taken. The most common were:
  - Reflecting on and updating knowledge, policies or approach around the EYFS and Ofsted inspection (n = 104).
  - Strengthening business and financial planning (20).
  - Improving support of staff's wellbeing and mental health (15).
  - Strengthening leadership and management skills/knowledge and approaches (15).
  - Identified a training need for staff (14).
  - Improved knowledge/skills/approaches to supervision and appraisal (13).

- o   Improved on-line presence and marketing strategy (8).
- o   Improved awareness of other potential income streams (6).
- o   Improved confidence (6)

Feedback from depth interviews and surveys with intensively assisted settings was also positive, though sample sizes are very small (13 settings). Examples included:

> "We accessed support about moving from an unincorporated charity to a CIO due to difficulties recruiting trustees. The information gained was clear and helped us to identify where to start and the process step by step, which means we will be able to do this by ourselves and save us money."

> "It's definitely given us the tools to be able to get our finances in order and see where we are losing money."

Opportunities for improvement

Areas for improvement flagged in surveys and depth interviews with participating settings included:

- Improved access to recordings of sessions to catch up on sessions missed, to refresh again in the future and/or cascade through the organisation.
- Clearer communication of any advanced preparation needed for 1-1 support.
- Develop different sessions for audiences with basic knowledge and more advanced knowledge.
- Allow more time for networking and Q and A in online sessions.
- Provide more signposting to resources beyond local authorities (LAs).
- Provide actual policies/resources in addition to advice.
- Include sessions on special educational needs and disability (SEND).

2 Introduction

Strong Early Years London (SEYL) was a business support programme for the early years and childcare sector in London. Running from May 2021 to March 2022, its aim was to support private, voluntary and independent (PVI) early years providers (day nurseries, pre-schools, and childminders) with the business skills, knowledge and confidence needed to survive and thrive in the wake of the COVID-19 pandemic.

The programme was funded by the Mayor of London and commissioned by the Greater London Authority (GLA). The Early Years Alliance, a sector membership body, was appointed to coordinate the programme, and independent research agency CEEDA was appointed to evaluate programme impact.

The programme was informed by baseline research into the business support needs of early years providers in the capital, conducted by Ceeda and the Early Years Alliance in autumn 2020.[1] The report found significant barriers to accessing support including cost, time pressures, lack of a clear entry point to support and lack of clarity on needs i.e., 'not knowing what you don't know.'

The research recommended:

1. **The development of a web-based 'one stop shop' to bring greater coordination and accessibility to the offer of business support for the early years sector in London**. A one stop shop (OSS) should provide an on-line directory signposting to relevant business support resources across the capital, supported by a triage service to help setting managers and childminders identify their specific areas of need.

2. **Delivery of a programme of sustainability support across London in the 2021-2022 financial year.** A need for support around financial forecasting, budgeting, marketing and human resource management was identified. The research pointed to a need for diverse delivery models including in-person and online tools and resources to accommodate varying provider needs and circumstances.

The commissioned programme of support aimed to create and deliver a range of resources and support to help settings develop their business skills. These included:

- An online OSS, hosted on the London Business Hub website presenting all relevant information around business support from local authorities and training providers https://www.businesshub.london/early-years/

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[1]
https://www.london.gov.uk/sites/default/files/the_business_support_needs_of_londons_early_years_sector_and_how_they_can_be_met.pdf

- On-line webinars and 'Business Connect' briefing sessions on a range of business topics. The programme also co-delivered sessions with local authorities.
- A telephone helpline operated by Early Years Alliance staff, providing a 'triage' service to evaluate needs and signpost to relevant support.
- Intensive consultancy support for individual providers on topics they identified as being most pressing. This included, amongst other resources, a 'budgeting toolkit' which enabled detailed financial budgeting and forecasting at setting level, supported by a specialist adviser.

The programme webinars were designed for large audiences, with client participation limited to text-based questioning. Business Connect sessions were designed as smaller, interactive events, with the participants usually onscreen and able to actively participate with the hosts and each other.

Most resources, with the exception of intensive consultancy, were offered on a 'universal' basis - freely available to all with an interest in engaging with them. A prioritisation schema was developed for targeting intensive consultancy support, with criteria including financial distress (self-defined using a classification scale), setting size (priority given to settings offering more places) and level of disadvantage (priority given to settings in disadvantaged areas as defined by the income deprivation affecting children index (IDACI)). The schema also factored Local Authority perspectives on priorities for support in their area.

The project was collaborative in nature working closely with local authority early years teams and other stakeholders to ensure that support and advice provided aligned with and reinforced local messages.

The programme has utilised several research and intelligence streams to inform its development and evaluate impact. These include:

- A detailed cross-sectional baseline study of sector needs for business support conducted by Ceeda and the Early Years Alliance in Autumn 2020 (sample size 518 PVI childcare providers).
- Three cross-sectional tracker surveys of sector challenges conducted in summer 2021, autumn 2021 and spring 2022 (sample sizes 320, 322 and 221 providers respectively). Each wave provided a single snapshot of the sector in time, with appeals to participate being communicated across the capital's early years sector.
- Follow up surveys of providers engaging with SEYL business support services (362 programme recipients).
- Depth interviews with programme stakeholders (10 cases) and intensive users of Strong Early Years London support (13 cases).
- Contract management data collected by the Early Years Alliance.

Technical notes

1. It is noted that the sample size for providers receiving intensive support is small and feedback is qualitative in nature.

2. The spring 2022 wave of the sector tracker had a significantly smaller sample than previous survey waves, despite using the same methodology. This is likely to reflect the operational pressures in the sector and in particular, the marked rise in staff shortages, giving rise to increased workloads. The margin of error [2] for spring 2022 figures is therefore higher (6.5) than in previous waves in 2021 (5) and the baseline study in 2020 (4).

3. Throughout this report a distinction is made between 'non-domestic' providers and 'childminders'. <u>For the purposes of this report</u>, childminder provision includes Ofsted registered childminders working from their own home, and childcare on domestic premises, where four or more people look after children at any one time in someone's home. Non-domestic provision includes Ofsted registered day nurseries and pre-schools operating from premises that are not someone's home.

Further details on research methodology are provided at Annex 1.

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[2] The margin of error is a plus-or-minus figure that indicates the range in which 'true' answers would fall if everyone in the target population had participated in a survey. For example, if a survey has a margin of error of 5 and 50% of the sample picks an answer, you can be "sure" that if you had asked the question of the entire relevant population, between 45% (50 - 5) and 55% (50 + 5) would have picked that answer.

3 Project delivery

Table 1: List of project deliverables

Project Deliverable	Number
Unique London providers receiving support via attendance at events (this includes webinars, business connect workshops, local surgeries and/or 1-1 consultancy - i.e. all aspects of SEYL, aside from the one-stop-shop)	1,344 *Note: this is made up of 1,021 nurseries and 323 childminders.*
Providers accessing one-stop-shop on London Business Hub.	1,788 unique page views
Unique beneficiaries of intensive support, via 1-1 consultancy or repeated attendance at events	246 *Note: this figure is included in the 1,344 above and includes 31 providers who accessed 1-1 consultancy and 224 who accessed multiples events (9 providers accessed both).*
Providers accessing business connect and webinars post-event via YouTube.	2,128 unique views
Local Authorities promoted to	33 (incl. City)
Local Authorities supported through the programme (i.e. at least one early years provider within the borough has accessed some form of support through events).	33 (incl. City)
Local Authorities actively involved in support of the programme	23 (incl. City)
Webinars delivered	7
Online Business Connect workshops delivered	43
Local Authority online surgeries delivered (surgeries hosted by or co-delivered with the Local Authority according to local preferences)	16
Beneficiaries of Local Authority surgeries	485 *Note: unique attendees are included in the 1,333 figure*

Various access routes to register interest in the programme were developed. These included a needs questionnaire on the webpage, a dedicated telephone triage

service, direct email to the programme team and referral from local authority partners.

Most registrations came through direct email, LA referral and/or registration onto webinars and on-line sessions. No enquiries were made via the web-based questionnaire and direct contact via the telephone helpline was very limited.

Telephone triage was offered via a helpline as baseline survey evidence pointed to a need for help in defining support requirements. This need remains in 2022, as shown in an analysis of barriers to accessing support at chapter five. It is not clear whether take up of telephone triage was low due to low awareness of the facility, or reluctance to make initial contact via a telephone conversation.

The original performance indicators to track contact via the website, surgery and triage service were amended accordingly to reflect participants' preferences. Similarly setting managers and childminders demonstrated a preference for intensive support through regular attendance at the on-line briefing and training sessions rather than one to one consultancy, and the performance indicators were amended accordingly.

4   Project reach

The programme achieved a wide reach, encompassing private and voluntary sector nurseries and pre-schools, childminders with and without staff and a range of other provision. Table 2 overleaf shows the number of unique settings/stakeholders engaging with resources over the project lifetime, the figures exclude website traffic.

Over one in ten (15%) of the capital's nurseries and pre-schools engaged directly with the project (figures exclude primary and maintained nursery schools). This compares with 4% of all childminders.[3] Lower engagement in childminding provision is explored in later chapters.

Table 2: Engagement by type of provider/stakeholder

Participant type	N	%
Private sector nursery or pre-school	514	50%
An out of school club/scheme	10	1%
Voluntary sector nursery or pre-school	139	14%
A local authority run day nursery or pre-school	30	3%
Childminder - employing staff	27	3%
Childminder – no staff	217	21%
An independent nursery/pre-school	53	5%
A maintained nursery school	8	1%
A primary school	4	0%
Other stakeholder e.g., trainers, consultants etc.	22	2%
	1024	100%

Source: Early Years Alliance (2022) Strong Early Years London contract monitoring data.

At borough level, penetration was highest for non-domestic provision in the City of London (50%), Croydon (29%) and Hammersmith and Fulham (27%). Figures for all boroughs are shown at Annex 2.

Table 3: Proportion of non-domestic settings engaging with the project by London borough

Borough	% of non-domestic PVI settings engaging
City of London	50%
Croydon	29%
Hammersmith & Fulham	27%
Haringey	21%
Hackney	21%
Harrow	20%
Barnet	20%
Brent	20%

Sources:
Early Years Alliance (2022) Strong Early Years London contract monitoring data.

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[3] The penetration rate is calculated on the basis of Ofsted registration data as of August 2021. Source: Ofsted (2021) Childcare providers and inspections as of 31 August 2021. 30 November 2021.

Ofsted (2021) Childcare providers and inspections as at 31 August 2021. 30 November 2021.

Hammersmith and Fulham also had notably higher levels of childminder engagement (21%) followed by Croydon and Lewisham at 9%.

Baseline research, conducted in 2020 and informing the development of the programme, indicated wide demand across all types of provision in both affluent and deprived communities (as measured by the IDACI index). This is in borne out in the deprivation profile of settings accessing universal provision, which is broadly similar to the profile of the wider London sector, with the exception of a slight bias towards the region's most deprived areas.

Table 4: Project penetration by deprivation level for childminder and non-domestic settings

	Childminder		Non-domestic	
	Participants	**All London**	**Participants**	**All London**
Most deprived	29%	23%	23%	21%
Deprived	30%	30%	26%	29%
Average	18%	19%	22%	21%
Less deprived	13%	17%	14%	16%
Least deprived	9%	12%	15%	13%

Sources:
Early Years Alliance (2022) Strong Early Years London contract monitoring data.
Ofsted (2021) Childcare providers and inspections as at 31 August 2021. 30 November 2021.

Almost two thirds of participating non-domestic settings (64%) were single-site operators. Analysis of Ofsted data[4] suggests that an estimated 50% of all non-domestic settings in London are single sites. This indicates that, as anticipated, smaller organisations were more likely to seek support.

Clients providing feedback on the universal support they had received gave details about their business status (n=326).

Few reported being at immediate risk of closure (<1%), however almost one in four described their provision as 'Struggling' – focused on survival over the next 12 months' (24%).

Table 5: Business status at the time of accessing universal support – all clients

Business status	**%**
Distressed - at immediate risk of closure	<1%
Struggling - focused on survival over next 12 months	24%
Stable - solid long-term business, no plans for growth	39%
Growing - expanding through gradual/organic growth	33%
Advancing - growing rapidly with plans for significant expansion	4%

Source: Ceeda (2022) Evaluation of Strong Early Years London business connect and webinar provision.

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[4] Analysis is indicative only and based on a count of the incidence of registered persons on the Ofsted register. Non-domestic groups may register their provision under more than one registered person.

5 Client satisfaction

Client satisfaction was tracked across the programme as services were delivered. Feedback on webinars (166 cases) and business connect sessions (196 cases) was very positive with the vast majority agreeing that: content was relevant and met expectations (95%), presenters were knowledgeable (97%), they enjoyed the session (96%) and would recommend it (96%). As previously noted, business connect sessions were designed as smaller, interactive events, with the participants usually onscreen and able to actively participate with the hosts and each other. The webinars were designed for larger audiences, with client participation limited to text-based questioning.

Table 6: Client satisfaction with webinar and business connect sessions

Performance criteria	Strongly agree	Agree	Neither	Disagree	Strongly Disagree	All agreeing
Registering for, and joining the session was simple	69%	29%	1%	1%	1%	98%
The session content was relevant and met my expectations	57%	38%	3%	1%	0%	95%
Presenters were knowledgeable	69%	28%	2%	1%	1%	97%
I learned something new	55%	38%	5%	1%	1%	93%
There are actions I will take as a result of the session	54%	35%	8%	2%	1%	90%
I enjoyed the session	59%	37%	2%	1%	1%	96%
I would recommend the session	66%	31%	2%	0%	2%	96%

Source for tables 6 and 7: Ceeda (2022) Evaluation of Strong Early Years London business connect and webinar provision.

Each session had several objectives with most clients giving four or more stars for the extent to which these were met (ranging from 83% to 89% across all objectives).

Table 7: Extent to which the objectives of universal support have been met

Extent to which objectives met	1 star	2 stars	3 stars	4 stars	5 stars	All rating 4 stars plus
Objective 1	3%	1%	6%	34%	55%	89%
Objective 2	2%	3%	8%	31%	56%	87%
Objective 3	3%	4%	8%	32%	53%	85%
Objective 4	3%	2%	12%	42%	41%	83%

6 Project impact

In this chapter we explore the impact the programme has made both in terms of individual settings and sector-wide trends in accessing business support.

Guided by baseline research conducted in 2020 and needs presented by providers during programme delivery, the content of support focused on financial forecasting, budgeting, marketing, governance, staff supervision and appraisal, recruitment, health and wellbeing and regulatory updates on inspection and the EYFS.

6.1 Benefits for project participants

The majority of clients accessing universal support said they had learned something new (93%) and would take actions as a result of the session (90%, see table 6 p9).

Just over two thirds of respondents (250, 69%) gave open comment feedback on the nature of learning and actions taken. The most common were:

- Reflecting on and updating knowledge, policies or approach around the EYFS and Ofsted inspection (n = 104).
- Strengthening business and financial planning (20).
- Improving support of staff's wellbeing and mental health (15).
- Strengthening leadership and management skills/knowledge and approaches (15).
- Identified a training need for staff (14).
- Improved knowledge/skills/approaches to supervision and appraisal (13).
- Improved on-line presence and marketing strategy (8).
- Improved awareness of other potential income streams (6).
- Improved confidence (6).

Reported benefits were directly related to the nature of support accessed, being highest for updating knowledge around the EYFS and inspection as these sessions had the highest attendance. Recent changes to the EYFS and inspection framework meant demand for content in these areas was high.

Comments included:

> "Alison is very knowledgeable in her field, I did not realise there were so many sources of income. This is going to be a really useful list."

> "I have recent experience of anxiety, and realise how physically ill it can make you, so with the training I feel I could spot the signs of someone struggling and help with suggestions of ways to cope through experience and the training."

> "We have a website but it is very outdated, and no-one really knows how to update it. So we are going to create a whole new one instead."

> "I need to do more work on balancing income versus expenditure, though we use an excel spreadsheet currently. I need to do more on the change in

customer need. Look more into the influences that impact the budget. I need to be more mindful of a yearly fee increase possibility, but be realistic on the clients I have as to whether this is affordable childcare. *(I)* understand more about break-even points."

"The course made me reflect on my practice as a manager; I have to listen more to what the staff are saying and look at signals that may not be verbal and talk and interrupt less."

"I have a better idea of what needs to be done to help make our setting sustainable. *(I)* have also accessed the offer of the budget toolkit consultation to hopefully be able to put what I have learned into practice."

"I have gained a lot. I got to know that I have to have a business plan, a mission statement, to have goals and so on."

Feedback from depth interviews and surveys with intensively assisted settings was also positive, though sample sizes are very small (13 settings), due to GDPR constraints and overlaps with feedback on universal support.[5]

"The excel spread sheet for budgeting is proving very helpful. The webinars I attended have had a positive impact on my confidence reinforcing that what I have been doing is good practice. Also given further information which will support me in my dealings with the staff."

"We accessed support about moving from an unincorporated charity to a CIO due to difficulties recruiting trustees. The information gained was clear and helped us to identify where to start and the process step by step, which means we will be able to do this by ourselves and save us money."

"Confirmation of current strategies boosted confidence that we were on track, thank you. We are very happy and feel more confident."

"We feel more confident and ready for an Ofsted inspection."

"We had never prepared yearly budgets, only forecasts, as we were in the situation of having excess receipts over payments. Preparing a budget helped to raise awareness of current areas of concern."

"It's definitely given us the tools to be able to get our finances in order and see where we are losing money."

"Really enjoyed the early morning sessions before the day really started. Enjoyed the marketing session but as we operate in a church hall, we are

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[5] Where local authorities hosted surgeries for the delivery of intensive programme assistance, delegate contact data was unavailable to the programme team. Where intensive assistance involved access to multiple webinars or business connect sessions, clients had already been approached for feedback via these separate sessions.

restricted around advertising. Enjoyed the opportunity to meet other providers and share concerns."

"Increased knowledge, greater confidence, upskilling staff team on a range of topics. The safeguarding training was phenomenal. All staff should have it."

"(The budget toolkit) allowed us to look at different scenarios and how they would impact our income and costs. The tool allowed us to model different scenarios from income, cost and staffing perspectives and present them in a structured way. The in-person delivery helped us get more from the tool as the adviser could make suggestions and encourage new thinking. Our finance officer has been in post a long time but was not involved in setting budgets in the past, the toolkit gave her deeper understanding of our income and cost base. The tool also encouraged us to re-think fees. Our immediate community is very deprived but very close to professional fee-paying families. We have started thinking more about how we can increase our capacity to generate more fee income."

"One area that wasn't covered so much was SEND, a specialism of ours. It would be difficult to run general sessions on this because people are coming from very different starting points, but it would have been good to have some input on this."

Detailed examples of impact are shared below:

Nursery setting accessing 1-1 consultancy and universal support

I have had 1-1 support with the budgeting tool which has been amazing. I opened the setting not long before lockdown started and we have been really struggling financially. I knew that it would take time for things to become established and just kept telling myself that it would turn around, but I had no clear picture of expenditure and lots of unexpected costs kept coming up. The budgeting tool showed me exactly what was happening and I was making a £4,000 loss. I am now clearer about what the costs are and where I can cut out nonessentials. I am also able to forecast income a lot better and calculate hours over the year. It has shown what I can do to make things more viable. My accountant has said how helpful it is too.

The people delivering the sessions are very knowledgeable, supportive and welcoming, they answer every question and are very engaging. It's also helpful to talk with others on the sessions and to share experience.

I have also joined sessions on supervision and appraisal, EYFS and Ofsted, and accessing other funding streams. Everything has been on point.

I would really like the project to continue because it has been an amazing help.

Pre-school accessing 1-1 consultancy and universal support

The sessions were really good because they encouraged two-way discussion and networking, where experience was shared and more insight gained as a result. The deliverers were very knowledgeable.

I gained a clear idea of what I needed to implement and cascade to staff, what Ofsted expected us to be doing. I was thankful that it was delivered because I had been very anxious about the changes. It was very reassuring to appreciate that it was all stuff I knew, just the language was different.

I used the website a lot to access videos of past sessions, this has been really helpful because I can time it when I am able to absorb it rather than in the middle of a pressured day. They also timed a lot of sessions in the evenings and in half terms and this worked really well for me.

The speakers were very knowledgeable and listening to other practitioners really helped too – we are all working to the same outcomes for children, so we need to be working together and learning from each other. The sessions really brought that about.

There is nothing I would change as the support received was amazing and has made all the difference in reassuring me that I am doing the right things.

6.2 Areas for improvement

Areas for improvement flagged in surveys and depth interviews with participating settings included:

- Improved access to recordings of sessions to catch up on sessions missed, to refresh again in the future and/or cascade through the organisation.
- Clearer communication of any advanced preparation needed for 1-1 support.
- Develop different sessions for audiences with basic knowledge and more advanced knowledge.
- Allow more time for networking and Q and A in online sessions.
- Provide more signposting to resources beyond local authorities (LAs).
- Provide actual policies/resources in addition to advice.
- Include sessions on special educational needs and disability (SEND).

Comments on improvements included:

"The time was too short and time for question and answer is needed."

"I think the session was too basic, intended for people that knew nothing about marketing in the early years. I would appreciate 2 groups (one basic and one

more advanced). More information from presenters and with questions only at the end of the session to make it faster and more enjoyable."

"More examples or actual policies."

"I thought there was quite a lot of emphasis on contacting your LA. Thankfully I am in a borough that offers a lot of support and guidance to childminders, but I am aware that many childminders do not have this service available to them. Suggestions about other forms of help and support could have been useful for those childminders."

"There have been several sessions I didn't hear about because I don't think I subscribed to the email communications but now I am aware I will go back and look at the video resources; it would be good for these to be available in the future to go back to and refresh and catch up on those I missed. You need time to process what has been said, go back to the settings, implement change and then reconsider them again."

"We weren't clear that we needed to prepare some questions, we thought it was a standard training. So making that clearer would be good."

"One area that wasn't covered so much was SEND, a specialism of ours. It would be difficult to run general sessions on this because people are coming from very different starting points, but it would have been good to have some input on this."

6.3   Stakeholder perspectives

The programme was guided by an Expert Advisory Panel, with representation from providers and local authorities. Project delivery also involved working closely with local authorities and other organisations supporting the sector in London, to cross-promote and deliver support at local level.

23 London Boroughs (including City) actively engaged with the programme, with supporting activities including supply of information on local business support offers for inclusion on the OSS, co-delivery of local surgeries and promotion of sessions to local providers. Engagement was strong as the programme was recognised as meeting a need that many authorities feel their declining infrastructure prevents them from meeting directly. The number of staff in local authority early years support teams has been in decline over several years, due to budgetary pressures.

Feedback from external programme stakeholders was sought via ten telephone interviews including 7 local authority contacts, 2 contacts providing support services to the sector and a large group childcare provider. The key themes emerging are outlined below.

Programme strengths

- Programme resources such as the budget toolkit and online sessions were well designed and of good quality.
- Resources provided 'trusted' additions to local offers and were on message with local priorities.
- The programme revealed gaps in existing local provision, with some stakeholders commissioning further work from the Early Years Alliance at local level to address these gaps going forward. For example, Bromley Local Authority commissioned the Alliance to provide a series of interventions under its Business Blocks initiative.
- The 'helpline' facility has been good for settings who 'don't know what they don't know', providing support and signposting to relevant resources.
- The project team's communication with stakeholders has generally been good.
- The programme could be rolled out to other areas for wider benefit, since the resources are not location specific and greater collaboration across the sector could save effort.

Comments included:

"The additional resources were very helpful and we promoted them to our settings as extra trusted resources."

"A lot of amazing content has been produced and feedback should be used to determine what goes forward and is shared on a wider basis."

"The project highlighted areas where we could strengthen our support offer to the sector and we have commissioned the Alliance to work on management and leadership sessions for our authority."

"The budget toolkit was an eye opener for many settings."

"Everything has been excellent. The main learning point is that a flexible approach is required to reflect each setting's different circumstances. All the work you have done has helped the sector enormously. The resources would not have been developed without the programme and they have been excellent."

"Liaison and consultancy have been really strong and tailored to the individual setting."

"(We) worked with the project team to make sure messages were consistent with those from the LA. There has been good feedback from settings who have attended sessions. Great resources produced. Online sessions, 1-1 and LA surgeries have been strong."

"Online events and surgeries were strong. This shows it is good to blend different types of delivery."

"Resources reinforce what LAs offer and give a 'second opinion' to corroborate advice."

"It would be valuable to keep a helpline or other contact mechanism so settings can talk to someone about the support they may need – tackling 'don't know what don't know.'"

Areas for improvement

The website has been identified as an area for improvement with the following points being flagged:

- Search Engine Optimisation (SEO) is weak and the website is unlikely to be picked up in a general search.
- The site lacks clear 'hooks' to drive people to relevant content and promote take up of support.
- It is difficult to find specific resources, such as recordings of past sessions.
- The search facility intended to display locally specific resources and pan-London support has not worked as intended, meaning providers may miss out on pan-London support relevant to them.
- The language and content of the site does not appeal to childminders.
- LAs lack the time needed to provide and update relevant content.

Other areas flagged included:

- The programme timeframe was too short to gather sufficient momentum.
- Recruitment challenges in the sector have significantly impacted take up, with hard to fill posts and high levels of sickness meaning managers are often diverted from their normal duties to work directly with children, limiting their ability to join sessions as planned.
- There could have been a clearer message on how to access session recordings and presentations post-event.
- There was a heavy reliance on online webinars; a wider mix of resources such as fact sheets and example policies would have further complimented the offer.
- The remit of the Expert Advisory Panel members could have been clearer; if the purpose was to communicate progress it worked well, if it was to contribute to the development of resources it didn't work so well. The latter would have required more frequent meetings and a longer programme time frame, to allow more consultation around resource development.
- The PR campaign could have been stronger with a programme strategy developed to drip feed stories throughout the project lifespan rather than at sporadic intervals.

Comments included:

"Childminders haven't engaged well, they couldn't find the website, didn't find the content relevant, and had no time to dig into the detail of it - the benefits were not immediately apparent."

"Website SEO is poor – I had to know the project name to find the website, it doesn't come up in generic searches that users would make. The homepage focused on what the project was for and who had commissioned it rather than immediately drawing attention to the help available."

"The main factor impacting uptake is the recruitment crisis. Staff are leaving the sector because of the pressures, low pay and Brexit. The new EYFS couldn't have come at a worse time, creating additional pressure and stress on a stretched workforce. Settings are struggling to get agency and bank staff to backfill staff isolating for COVID. Whilst people register with genuine interest, they then often have to work in ratios or are too tired on an evening to engage."

"Adoption and awareness were perhaps lower than expected and greater use of sector media channels may have helped with this. PR was released at points e.g., at launch, but a coordinated campaign with a funnel of messages drip fed over the project lifetime may have had more impact."

"The project timeframe was very short and this meant the delivery window was limited. A lot was thrown at settings in a short-time frame which was a bit overwhelming for some. It would be better to have a longer delivery window so settings could access resources in a more paced way. Delivery over a longer timeframe, ideally 5 years, would have increased take-up and engagement and therefore impact."

"The project should have been amazing, the content is good quality, the EYA have worked incredibly hard at getting it right, but these things take a long time to become established and trusted and for childminders to see a benefit."

"I did not actively engage with the website. If this is to be continued, engagement with LAs will be essential to ensure the information provided remains up to date and relevant. Our first instinct is to keep our website fit for purpose, it is not automatic that we would think to also update the SEYL one."

"Could have been made clearer that recordings could be accessed any time – along with a clear guidance on where to access them."

"Resources were predominantly webinar/online sessions and it would be good to have a greater mix, the Early Years Alliance has excellent factsheets etc. and these could have been used in the mix."

"It takes personal contact with childminders which isn't presented as 'support' but initiated through chatting, networking, bumping into people who can then drop things into conversation and give pointers to support. This has happened less with COVID. Perhaps a future model would be to provide the high quality resources produced by the programme to a network of local contacts who are known and trusted. Childminders won't ring a business support helpline."

Stakeholders flagged a continuing need for coordination of support across the sector, whilst recognising this is difficult to achieve and sustain:

> "There is a lot of poor quality training and consultancy out there and much of it is being put out through digital channels. Staff are pointed at online resources with little thinking behind what the purpose or benefit will be and how it fits into personal development and the setting's needs. Having some oversight on this and a more coordinated approach across sector bodies would deliver better quality and impact. In the absence of a more coordinated approach one strategy is to work through LAs to deliver strategic programmes of support, building their capacity to support the sector at local level."

Beyond the remit of the programme, it was noted that business and leadership skills need to be developed as a core part of qualifications, so that candidates come to early years more prepared for the management and leadership roles that will be required of them:

> "The other important factor is the failure of qualifications to prepare people for leadership and management roles in the sector. Colleges and universities need to reach out, engage and connect with the sector more to better understand the skills and knowledge needed. HE qualifications offer leadership and management modules as a choice, these skills are central to the role graduates will play."

6.4 Cross-sector impact

At sector level, the project aimed to reduce barriers to accessing business support and increase take up of all forms of business support, delivered both within and outside of the SEYL programme.

For ease of presentation and unless stated otherwise, the sources of all data in tables from this section forward are as follows:

- Autumn 2020 - Ceeda and Early Years Alliance (2020) The business support needs of London's early years sector and how they can best be met.
- Summer 2021 - Ceeda (2021) Strong Early Years London Sector Tracker Summer 2021.
- Autumn 2021 - Ceeda (2021) Strong Early Years London Sector Tracker Autumn 2021.
- Spring 2022 - Ceeda (2022) Strong Early Years London Sector Tracker Spring 2022.

Table 8 overleaf compares providers' perceptions of barriers to accessing business support in autumn 2020 and spring 2022.

The biggest barriers for non-domestic provision in 2020 were cost (42%), not knowing where to look (24%) lack of time to make effective use of provision (22%) and not knowing what support was needed (20%). By 2022, the proportion of providers not knowing where to seek support had dropped by a third, from 24% to

16%. Furthermore, fewer providers felt that not knowing what kind of support they required was a barrier, falling by a quarter from 20% to 15%.

Barriers of cost remain persistent (41%) with little change on 2020 figures of 42%. Time pressures have soared over the period with the proportion of providers feeling they don't have time to make effective use of support almost doubling from 22% to 40%. This reflects the pressures of the pandemic and staffing crisis, flagged elsewhere in this report.

Table 8: Barriers to accessing support in 2020 and 2022 by type of provider

	Autumn 2020	Spring 2022	Autumn 2020	Spring 2022
	Childminder		Non-domestic	
Cost	17%	23%	42%	41%
Lack of time	20%	21%	22%	40%
No barriers	28%	23%	19%	24%
Don't know where to look	20%	27%	24%	16%
Don't know what we need	20%	30%	20%	15%
Doubt will make a difference	17%	14%	18%	14%
Doubts about quality	7%	9%	13%	12%
Looked and can't find support	6%	5%	10%	12%
Manage issue ourselves	19%	11%	9%	11%
Won't understand our issues	8%	13%	13%	7%
Poor past experience	3%	7%	5%	5%

There is less positive news in respect of childminders, with the biggest barriers in 2020 all worsening, including not knowing where to look, up from 20% to 27%, not knowing the support needed, up from 20% to 30% and cost barriers, rising from 17% to 23%.

In line with the above trends, progress has also been greater in increasing take-up of business support amongst non-domestic providers, than in childminding provision.

Baseline research conducted by the Early Years Alliance and Ceeda in autumn 2020 found that 47% of non-domestic settings had accessed formal business support in the last 3 years, including a personal coach (15%), formal course (19%), consultant (19%) or workshop/seminar (22%). Almost two fifths had accessed informal support through peer-to-peer networks (39%).

In 2022, the final wave of the Strong Early Years London sector tracker found 53% of settings had accessed support in the last 3 years (from all sources), an increase of 13% (6 percentage points). The figures for specific types of support were: personal coach (14%), consultant (17%), formal training course (17%) and workshops (36%). Peer to peer support was cited by 34%.

For childminders, the overall proportion accessing support in 2020 from all sources was 42%. Types of support accessed included a personal coach (4%), formal course (20%), consultant (4%), workshop/seminar (19%). Almost half had accessed informal peer to peer support (47%).

In 2022, the proportion of childminder's reporting use of formal business support in the last 3 years had fallen by 2 percentage points to 40%. Types of support accessed included a personal coach (7%), formal course (20%), consultant (7%) and workshops/seminars (16%). Over two fifths had used informal peer to peer support (42%).

As reflected in project outcomes, where 15% of non-domestic providers in London engaged with the project compared to 4% of childminders, these figures on wider sector engagement with business support show far greater traction in non-domestic settings than in childminder provision.

6.5 Levels of awareness and reasons for not engaging

The spring tracker survey shows awareness of Strong Early Years London is far higher in non-domestic provision (73%) than for childminders (51%).

Table 9: Awareness and use of strong Early Years London support in spring 2022 by provider type

Awareness and use	Childminders	Non-domestic
Heard of it and used it	8%	33%
Heard of it and not used it	43%	40%
Not heard of it	48%	28%

Just 8% of childminders said they were aware of and used the programme, compared to 33% of non-domestic providers. 'Used it' in this context could include visiting the programme website as well as more direct engagement.

Levels of awareness are impressive given the short lifespan of the programme, though it is noted that project participants may be more likely to respond to general cross-sector survey appeals than those unaware of the programme.

Providers reporting being aware of, but not using, Strong Early Years London support were asked why.

For non-domestic providers, the main barriers were time, no perceived need, and a belief that the programme could not address their needs:

"I have only recently heard about it."
"The timing of sessions."
"Lack of time (4)."
"Timing and not able to access appropriate support for our needs."
"It's not what we need. Too little, too fluffy and too late."
"I don't see how they can help me to recruit staff. I have used all the resources available to help me recruit staff but it clearly shows that people who are in receipt of benefits clearly don't want to work…."
"Local authority have been very supportive."
"Business is doing well."
"Delegated to nursery managers to access."
"Don't know enough about it."
"Not needed. We need money, not to pay consultant to tell us to increase fees."
"I wanted to use one service 'Exiting the business' as in sell the business but I was not sure whether this help is available, so I have not used it."
"I don't feel you can help me. Our main issue is Covid, and the Governments mad new regulations are the main cause."

Childminders aware of but not taking up support commented:

> "Don't know how it works and how to access it."
> "Was busy just trying to stay afloat in the last 2 years."
> "Haven't felt like I've needed it. My business is sustainable & fluctuates between busier & quieter which suits me."
> "Don't feel they can help."
> "Time ... I get up at 6am and close at 6pm to then look after my own family. I may sit down by 8.30pm to try and relax before bed or I do some admin."
> "Too busy."
> "I was not aware of its full support."
> "Because I don't have time at the moment & don't feel that my childminding setting is suffering in any way at the moment."
> "Don't feel I need it."
> "Don't need it."
> "Just heard recently."
> "None of business meetings have been a subject I'm interested in."
> "I'm a bit embarrassed."

6.6   Trends in demand for business support

Overall levels of demand for business support in non-domestic provision are unchanged with 67% of settings identifying one or more business support needs in spring 2022 compared to 66% in 2020. Table 10 overleaf provides a comparison of demand in autumn 2020 and spring 2022.

Demand for support in dealing with Covid has declined two years into the pandemic, falling from 25% in autumn 2020 to 7% in spring 2022. Demand for support in the general category of developing and managing people, which includes all aspects of HR, soared from 26% in autumn 2020 to 41% in spring 2022. This reflects the increasingly competitive labour market and health and wellbeing pressures noted elsewhere in the report.

Future childminder demand for one or more areas of business support has risen from 55% in autumn 2020 to 62% in spring 2022. Again demand for Covid support was substantially lower, falling from 35% in 2020 to 9% in spring 2022. There was a marked increase for support in using new technology (14% in 2020 to 21% in 2022), marketing services (from 23% to 34%) and reducing impact on the environment (12% to 25%).

Table 10: Future demand for business support in 2020 and 2022

Area of support	Childminder		Non-domestic	
	October 2020	Spring 2022	October 2020	Spring 2022
Managing Covid measures	35%	9%	25%	7%
Developing and marketing services	23%	34%	36%	31%
Developing and managing people	9%	13%	26%	41%
Managing finance	22%	28%	24%	23%
Organisation leadership	19%	25%	21%	25%
Using technology	14%	21%	19%	22%
Sustainable environment and communities*	12%	25%	18%	19%
One or more areas of support	55%	62%	66%	67%
No support	45%	38%	32%	33%

* Managing the impact of provision on the environment and working with local communities.

6.7 Trends in sector challenges and sustainability

Sector trends and challenges in London have been charted via a baseline study in 2020 and three waves of a sector tracker study.

The following analysis provides useful context in which to reflect on programme performance; it is not presented as evidence of impact or the lack thereof, since there are many variables determining sector sustainability.

Non-domestic provision

Challenges as reported by non-domestic provision are summarised in table 11.

Table 11: Challenges for non-domestic providers autumn 2020 to spring 2022

Challenge	Autumn 2020	Summer 2021	Autumn 2021	Spring 2022
Increases in staffing costs	49%	47%	63%	76%
Free entitlement funding rates lower than costs of delivery	68%	65%	71%	74%
Difficulties recruiting staff	23%	50%	52%	73%
Staff absence due to confirmed COVID infection	*	17%	31%	44%
Supporting staff wellbeing	*	49%	50%	42%
Increases in non-labour costs	21%	21%	28%	36%
Difficulties retaining staff	6%	26%	25%	31%
Declining demand	57%	52%	40%	28%
Gaps in the skills and knowledge of your teams	12%	24%	20%	28%
Increasing demand	6%	12%	18%	27%
Late payment of parent fees	24%	20%	25%	24%
Erratic demand	22%	24%	20%	23%
Staff absence due to contact with a positive COVID case	*	28%	30%	18%
Short term cash-flow problems	24%	20%	17%	16%
Accessing COVID-19 tests for staff	27%	6%	3%	16%
Organising staffing to reduce COVID-19 impact i.e., bubbles	34%	28%	16%	15%
Long-standing problems around financial viability	22%	25%	25%	14%
Cutting jobs in response to changing demand	24%	20%	12%	11%
Difficulty sourcing finance for business growth	7%	15%	8%	10%
Difficulty managing business debts / loan repayments	4%	7%	5%	7%
Accessing COVID-19 tests for children	16%	6%	1%	5%
Introducing new technology	8%	9%	6%	3%
Difficulties in your supply chain	8%	4%	5%	3%
Wait times for COVID-19 test results	28%	13%	5%	2%

* Response category not displayed

The key trends highlighted include:

- Increasing financial pressures from rising staff costs, reported by 49% of settings in autumn 2020 and 76% in spring 2022.
- A substantial upward trend in the number of London settings experiencing difficulties in recruiting staff, rising from 23% in autumn 2020 to 73% in spring 2022.
- Increasing difficulties in retaining staff, rising from 6% in 2020 to 31% in spring 2022.

- Increasing numbers reporting skills gaps in their existing teams, up from 12% in 2020 to 28% in spring 2022.
- Rising non labour costs, reported by 21% in 2020 and 36% in spring 2022.
- Ongoing shortfalls between the rates paid by local authorities for funded places and the cost of delivering them; 68% reported gaps in autumn 2020 rising to 74% in spring 2022.
- The proportion of settings reporting declining parental demand has fallen from 57% in autumn 2020 to 28% in spring 2022.

Further analysis of recruitment challenges shows that in spring 2022, two thirds of all London nurseries and pre-schools had staff vacancies (67%) and 94% were finding them hard to fill. The figures in autumn 2021 were 49% and 96% respectively.

Occupancy in non-domestic provision has shown gradual improvement over the programme lifetime, from a term-time average of 58% in summer 2021 to 65% in autumn 2021 and 72% in spring 2022. The average masks widely varying circumstances in local markets however, as shown in table 12.

Table 12: Banded occupancy in non-domestic provision summer 2021 to spring 2022

Non-domestic occupancy banded	Summer 2021	Autumn 2021	Spring 2022
20% or less	17%	5%	4%
21% to 40%	17%	15%	7%
41% to 60%	29%	20%	18%
61% to 80%	23%	32%	34%
81% to 100%	15%	28%	38%

Baseline and tracker surveys have shown that over the lifetime of the programme, sector wide business performance in nurseries and pre-schools has shown little consistent improvement.

Table 13: Overall business status of non-domestic provision autumn 2020 to spring 2022

	Autumn 2020	Summer 2021	Autumn 2021	Spring 2022
Distressed – at immediate risk of closure	4%	3%	3%	4%
Struggling – focused on survival over the next 12 months	60%	53%	52%	56%
Stable – solid long-term business, no plans for growth	25%	33%	31%	26%
Growing – growing rapidly with plans for significant expansion	11%	9%	13%	13%
Advancing – growing rapidly with plans for significant expansion	1%	3%	2%	2%

Despite the rise in average occupancy, many settings are still operating at breakeven (40%) or a loss (46%), reflecting rising costs, variable occupancy and inadequate funding rates.

Table 14: Financial performance of non-domestic settings autumn 2020 to spring 2022

	Autumn 2020	Summer 2021	Autumn 2021	Spring 2022
Making a loss	53%	44%	43%	46%
Breaking even	38%	38%	41%	40%
Making a profit/surplus	9%	19%	17%	14%

Childminder provision

As for non-domestic provision, the proportion of childminders reporting declining parent demand has reduced over the project lifespan, from 55% in 2020 to 37% in spring 2022 (see table 15 overleaf).

Rising costs are chipping away at recovery however, with twice as many childminders reporting rising costs in spring 2022 (54%) compared to 2020 figures (26%).

Concerns around personal wellbeing peaked in autumn 2021 (41%), although more than one in three childminders (37%) reported this as a concern in spring 2022.

Childminders with staff also reported challenges in spring 2022 around increasing staff costs (5% of all childminders), supporting staff wellbeing (5%), wait times for Covid 19 test results for staff (8%) and staff absence due to confirmed Covid infection (3%).

Whilst far fewer childminders have very low occupancy levels of 20% or less in 2022 (8% compared to 35% in summer 2021, see table 16 overleaf), London averages have waned over the study period from 66% in the summer term of 2021, falling to 61% in autumn 2021 and down again to 54% in spring 2022.

Table 15: Challenges for childminders autumn 2020 to spring 2022

Challenge	Autumn 2020	Summer 2021	Autumn 2021	Spring 2022
Declining demand from parents	55%	53%	53%	37%
Short-term financial problems e.g., loss of income during the pandemic	63%	43%	44%	38%
Increases in other costs e.g., insurance, training etc	26%	40%	42%	54%
Free entitlement funding rates lower than cost of delivering places	31%	40%	41%	44%
Looking after my own wellbeing	*	27%	41%	37%
Erratic demand - fast and unpredictable fluctuations in use of services	26%	25%	26%	22%
Late payment of parent fees	15%	18%	22%	16%
Finding money to help grow my childminding business	20%	22%	21%	16%
Increasing demand from parents	7%	7%	13%	13%
Wait times for COVID-19 test results	17%	13%	12%	5%
Difficulty managing my debts	10%	10%	10%	8%
Long-standing financial problems pre-dating the pandemic	23%	8%	8%	2%
I don't have any challenges	7%	8%	6%	8%
Introducing new technology	2%	2%	5%	6%
Accessing COVID-19 tests for children	12%	3%	3%	10%
Difficulties getting hold of goods or services I need for my provision	9%	6%	1%	3%

* Response category not displayed.

Table 16: Banded occupancy in childminding provision summer 2020 to spring 2022

Childminder occupancy banded	Summer 2021	Autumn 2021	Spring 2022
20% or less	35%	19%	8%
21% to 40%	10%	15%	24%
41% to 60%	18%	29%	31%
61% to 80%	18%	13%	22%
81% to 100%	20%	24%	14%

Childminder numbers have seen a marked decline in the capital, as elsewhere in England and the tracker study reflects this; around 1 in 10 childminders described their status as 'winding down' in the last three survey waves.

On a more positive note, there has been a decline in 'struggling' childminder settings from 1 in 2 in autumn 2020 to just over 1 in 4 in spring 2022, with a corresponding increase in stable and growth settings.

Table 17: Overall business status of childminder provision autumn 2020 to spring 2022

Childminder status	Autumn 2020	Summer 2021	Autumn 2021	Spring 2021
Winding down – I am likely to stop childminding very soon	6%	10%	11%	10%
Struggling – I'm focused on trying to stay open over the next 12 months	50%	36%	35%	27%
Stable – my childminding business is solid, but I have no plans to expand	41%	45%	49%	51%
Growing – I have plans to expand my business e.g., by working more hours or taking on staff	3%	9%	5%	12%

There has been a gradual but consistent increase in the proportion of childminders saying they are operating at a profit, from 20% in autumn 2020 to 36% in spring 2022; they are still in the minority however, with one in five childminders still making a loss (20%) and 43% breaking even.

Table 18: Financial performance of London childminder settings autumn 2020 to spring 2022

Childminder financial performance	Autumn 2020	Summer 2021	Autumn 2021	Spring 2022
Making a loss	42%	33%	32%	20%
Breaking even	37%	41%	35%	43%
Making a profit/surplus	20%	26%	32%	36%

7 Summary of impact and learning for others

Intelligence collected prior to programme development and throughout the programme lifespan illustrates several key points:

- There is substantial need and demand for business support across the early years sector, spanning provision in communities of all levels of deprivation and affluence, and at all states of business performance; from struggling provision through to organisations experiencing or aspiring to rapid growth.

- The main barriers to accessing support are predominantly, but not exclusively, the pressures of time and cost. Funds and time are under ever increasing pressure due to escalating workforce challenges and related gaps between the cost of delivering early years places and prevailing government funding rates.

- The evidence base shows the SEYL programme has been successful in promoting awareness of support, tackling some of the barriers to access, increasing take-up of support and achieving positive impact for nurseries and pre-schools in London.

- Traction and impact have been significantly lower in childminding provision, where time pressures on practitioners, often working alone, are greater. Feedback also suggests that the language and messaging of the project did not connect so well with childminders.

- Online webinar/business connect sessions have proved the most popular channel for supporting providers in the context of current workforce challenges; though it is clear that 1-1 triage and support, where providers have had the time to engage, has been much appreciated and beneficial.

- The SEYL one stop shop website has been identified as an area for improvement, lacking audience 'hooks' and proving tricky to find, navigate and search. Despite these challenges, web traffic has been relatively strong in the available programme time frame.

Lessons learned

There are several key points to highlight in terms of future business support for providers in London:

- With regards the Early Years and Childminding one stop shop on the London Business Hub, it is suggested that any content going forward needs to be more closely tailored to specific user needs. Local Authority stakeholders felt there was little value in signposting or duplicating their own resources and services, as providers are likely to head straight to Local Authority websites when looking for support. Content should be pan-London in its applications,

and more focused upon specific business issues and challenges rather than sub-regional resources. Search infrastructure and SEO improvement will also be important factors going forward.

- The positive feedback regarding the programme's budgeting toolkit demonstrates the value in focusing upon universal, high-quality tools. Providers are not reticent to be 'hand-held' in this regard and are appreciative of such resources.

- Any future web presence and broader programme of support would benefit from a review of how to better connect with childminders. This shrinking area of the sector faces particular challenges, whilst having a greater tendency to network and seek advice through social media and forum interactions. Any future programme would be advised to seek further consultation from childminders before developing further support.

- The programme provided an urgent response to the immediate challenges presented by the pandemic. As such it was a rapid injection of resources over a constrained time frame of ten months. Future support would benefit from a longer time frame of two years or more, to develop traction and build wider engagement. This is especially true given the staffing and time pressures upon providers, an issue that predated and has been exacerbated by the pandemic.

The resources and intensive support models developed under the project will remain available to providers in the capital through consultancy arrangements with the Early Years Alliance and other stakeholders.

Annex 1: Research methodology

Baseline research

Autumn 2020 - Ceeda and Early Years Alliance (2020) The business support needs of London's early years sector and how they can best be met. Sample size 518 cases.

An online survey distributed widely across sector networks and social media channels.

Sector tracker

Three waves of a cross-sectional online survey distributed widely across sector networks and social media channels. Surveys are a 'snapshot' in time, comprising separate samples, though some overlap in samples will occur.

Summer 2021 - Ceeda (2021) Strong Early Years London Sector Tracker Summer 2021.Sample size 320 cases.

Autumn 2021 - Ceeda (2021) Strong Early Years London Sector Tracker Autumn 2021. Sample size 322 cases.

Spring 2022 - Ceeda (2022) Strong Early Years London Sector Tracker Spring 2022. Sample size 221 cases.

Project monitoring data

Ceeda (2022) Evaluation of Strong Early Years London business connect and webinar provision. Online surveys distributed to delegates post-event. Sample size 362 cases.

Follow up of intensive assistance
Detailed feedback was collected via interviews or surveys with 13 settings.

External stakeholder feedback
10 interviews were conducted with external project stakeholders.

Annex 2: Programme engagement at borough level

Table 19: Proportion of non-domestic settings engaging with the project: all London boroughs

Borough	Childminder	Non-domestic
Barking & Dagenham	1%	5%
Barnet	4%	20%
Bexley	1%	11%
Brent	7%	20%
Bromley	3%	17%
Camden	1%	16%
City of London	NA	50%
Croydon	9%	29%
Ealing	1%	9%
Enfield	2%	15%
Greenwich	1%	11%
Hackney	5%	21%
Hammersmith & Fulham	21%	27%
Haringey	1%	21%
Harrow	7%	20%
Havering	0%	5%
Hillingdon	3%	12%
Hounslow	4%	19%
Islington	4%	8%
Kensington & Chelsea	0%	13%
Kingston upon Thames	5%	17%
Lambeth	2%	18%
Lewisham	9%	19%
Merton	6%	14%
Newham	0%	7%
Redbridge	1%	9%
Richmond upon Thames	3%	12%
Southwark	6%	15%
Sutton	0%	18%
Tower Hamlets	2%	7%
Waltham Forest	3%	11%
Wandsworth	2%	8%
Westminster	2%	7%