



Adult Social Care Market Position Statement

2026-2031



Havering
LONDON BOROUGH

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About this document

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Review frequency: Refresh every 1 year

Next review date: 2027

Introduction

The Havering Adult Social Care Market Position Statement 2026–2031 sets out our strategic vision and priorities for adult social care and support services within the borough. This document demonstrates our commitment to growing and strengthening the local care market, in accordance with the market-shaping duties established under the Care Act 2014.

Central to our approach is the introduction of the Adult Commissioned Placement (ACP) Framework, which brings together Residential and Nursing Care Homes, Homecare, and Supported Living Placements within a single, comprehensive structure. Operating from 2026 to 2030, this framework is intended to enhance the quality of care and support for adults by prioritising standardisation, person-centred care, and ongoing improvement.

Through this Statement, we outline our commitment to working collaboratively with care providers to develop and sustain a strong, diverse, and high-quality marketplace for adults and carers in Havering. The ACP Framework fosters environments where residents can flourish with dignity, ensuring consistently high standards across services and positive outcomes in well-being. Our strategy actively supports a sustainable provider market, equipping providers with the resources and opportunities needed to adapt, grow, and remain resilient in the face of financial, regulatory, and workforce challenges, thereby securing long-term stability in care provision for all residents.

Our aim is to encourage a shared understanding among providers, commissioners, and stakeholders regarding the demand and supply of local care services, as well as our commissioning intentions for the years ahead. In doing so, we hope to facilitate ongoing dialogue, support innovation, and work together to address the challenges and opportunities facing the local health and social care sector, all with the goal of securing better outcomes for Havering residents.

The Market Position Statement is informed by local data and insights, particularly from Havering’s Joint Strategic Needs Assessment (JSNA), and is designed to be adaptive to local developments. To ensure it remains current and relevant, we will review and update this Statement throughout the period 2026–2031, with a planned refresh every twelve months to reflect new data and emerging trends.

This document is intended for both current and prospective providers of care and support for adults with social care needs, with a primary focus on services delivered within Havering. We also recognise that some services may be delivered outside the borough or to residents from other local authorities currently living in Havering.

The purpose and scope of the Market Position Statement is to help providers understand:

- Havering’s strategic direction for the local care market and priorities for different service user groups
- Forecasts for future support needs and the anticipated impact on service demand
- How to engage and collaborate with the Council to deliver improved services across Havering

Commissioning Vision

Our Vision

Our commissioning vision is to create person centred, seamless care and support designed around the needs of local people throughout their life course, with a strong focus on prevention, addressing inequalities and the wider determinants of health.

This compliments Havering Council's vision for the 'Havering that you want to be a part of', with a strong focus on people, place and resources.

Our Commissioning Priorities

Prevention & Wellbeing	Personalisation & Choice	Maintain Independence	Equality & Inclusion	Quality Care	Financial Sustainability
	 Increase opportunities enabling individuals to tailor support to their needs and exercise greater control over their care arrangements		 Embedding inclusion and equity for all protected characteristics in service design and delivery		

Key Principles

We ensure care is accessible, transparent and responsive to diverse needs	People have a say and a stake in decision making	We work together and explore opportunities for joint working and integrated care	We support and develop the Havering care workforce	We embrace and develop the opportunities offered by digital advancement	Building on and amplifying what is already in the borough and integrating health and care
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Strategic Context

Havering is committed to developing a robust and forward-thinking adult social care system that reflects both local needs and the broader legislative and strategic environment. Our approach is underpinned by a clear vision for partnership, innovation, and continuous improvement. This strategic context outlines the principles, legislative frameworks, and joint priorities guiding Havering's work with providers and stakeholders as we shape the social care market for the future.

Desired Outcomes and Partnership Principles

We are intent on collaborating with providers who share our commitment to improving the lives of residents and who demonstrate an understanding of the London Borough of Havering's changing care landscape.

Our partners are expected to:

- Adopt a whole-family approach in service delivery.
- Embrace innovation, particularly where it supports prevention and fosters independence.
- Work collaboratively across organisations and sectors.
- Uphold high quality standards and openly publish independent monitoring results.
- Demonstrate a clear understanding of demand dynamics within Havering.
- Evidence, measure and communicate the impact of their activities.
- Articulate wider social impacts, including contributions to wellbeing.
- Avoid unnecessary duplication of existing services.

Transforming Adult Social Care: People at the Heart

National social care reforms emphasise the importance of certainty, fairness, and sustainability for those accessing care. No individual will face unlimited and unpredictable costs for their care, with government intervention providing essential security for those most in need.

Havering's vision is to put people and families at the centre of adult social care by:

- Offering genuine choice and control over the support individuals receive.
- Promoting independence and fostering strong, inclusive communities.
- Championing a skilled, committed workforce dedicated to delivering outstanding care.
- Recognising and valuing unpaid carers for their vital contributions.

By setting out this strategic context, Havering affirms its commitment to partnership, innovation, and high-quality service provision ensuring that our residents receive the care and support, they deserve now and in the future.

National Legislation and Local Strategy

Havering operates within a complex legislative framework. National legislation, including the Care Act 2014, the Better Care Fund, and the Public Services (Social Value) Act 2013, shapes the way we commission and deliver services. These frameworks mandate a focus on prevention, wellbeing, quality, and value, requiring both commissioners and providers to be proactive and adaptive.

Responding to the Care Act 2014

The Care Act 2014 places clear responsibilities on local authorities and providers.

We are required to:

- Promote wellbeing for individuals and communities.
- Prevent or delay the onset of care and support needs wherever possible.
- Empower people to make informed choices and maintain control over their own care planning.
- Ensure carers receive assessments.
- Improve the quality and accessibility of information, including access to independent advocacy.
- Shape the care market to foster quality, sustainability, and greater choice.
- Manage risks in provision, including financial sustainability, safeguarding, and provider continuity.

Through proactive engagement with providers, we are shaping a market that meets the needs of both council-supported individuals and those who fund their care through direct payments.

This collaborative approach underpins Havering's ambition to ensure effective, sustainable, and person-centred support for all.

The Better Care Fund (BCF)

The Better Care Fund facilitates integrated working between health and social care, aiming for joined-up, preventative, and responsive services. Havering, alongside NHS ICB have developed a joint BCF plan that respects individual priorities while capitalising on shared opportunities for improvement.

The three core BCF priorities are to:

- **Sickness to Prevention:** Shifting the focus to proactive care so people remain healthy and independent at home.
- **Hospital to Home:** Preventing avoidable hospital admissions and ensuring timely discharge.
- **Integrated Care:** Developing co-ordinated, person-centred support closer to home.

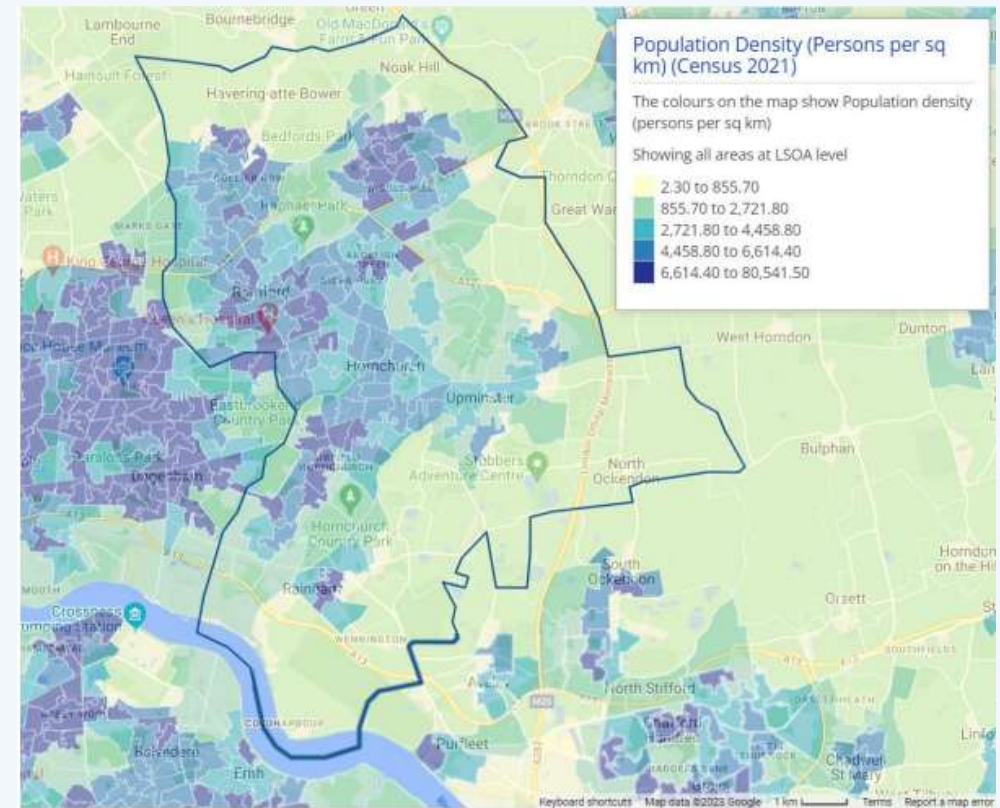
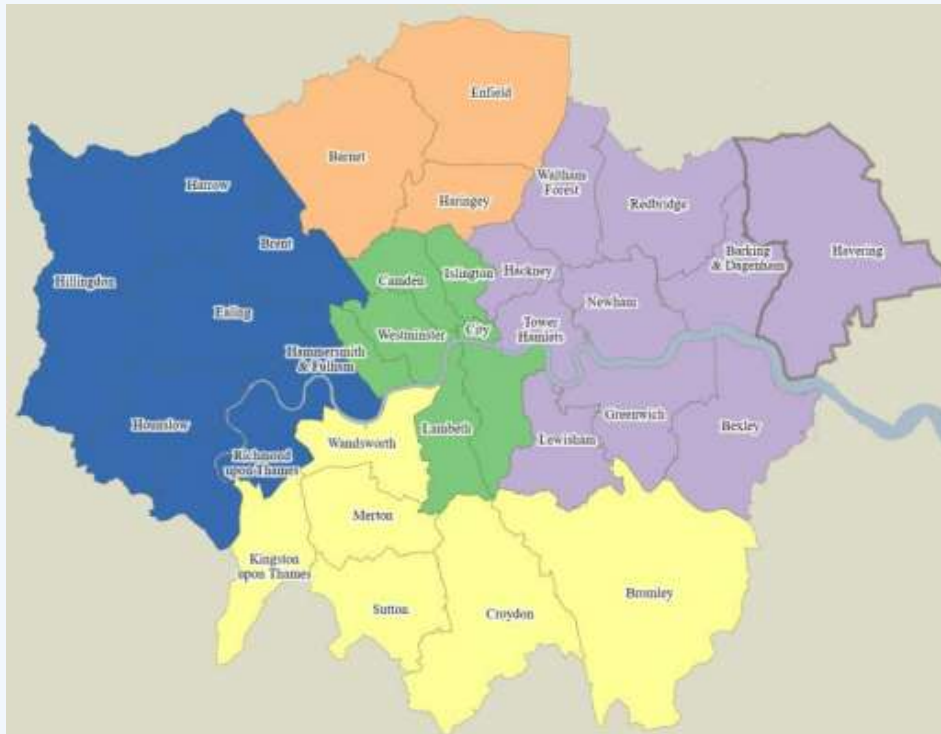
Providers play a central role in delivering against all these priorities, and we value their contributions in achieving better outcomes through integrated service delivery.

Social Value Act

The Public Services (Social Value) Act 2013 requires commissioners to consider how procurement can achieve broader social, economic, and environmental benefits. In Havering, this means embedding social value into every stage of the commissioning process prior to procurement, we engage with the provider market and community to design services that are not only effective but also maximise local benefits. The Act is a powerful tool to achieve best value for money and encourage new, innovative solutions to complex local challenges.

About Havering

Havering is the third largest London borough, covering some 43 square miles. It is located on the northeast boundary of Greater London. Havering is bordered to the north and east by the Essex countryside, to the south by a three-mile River Thames frontage, and to the west by the neighbouring London boroughs of Redbridge and Barking & Dagenham.



Havering's average population density relatively lower compared with other London boroughs and is estimated to be 2,332 persons per square kilometre (ONS Census, 2021). On the other hand, its principal town (Romford), is densely populated and is a major metropolitan retail and night time entertainment centre. The southern part of Havering adjacent to the Thames is within the London Riverside section of the Thames Gateway redevelopment area. This will therefore continue to be a site of increasing development and population change.

262,100

residents

↑ 10.5%

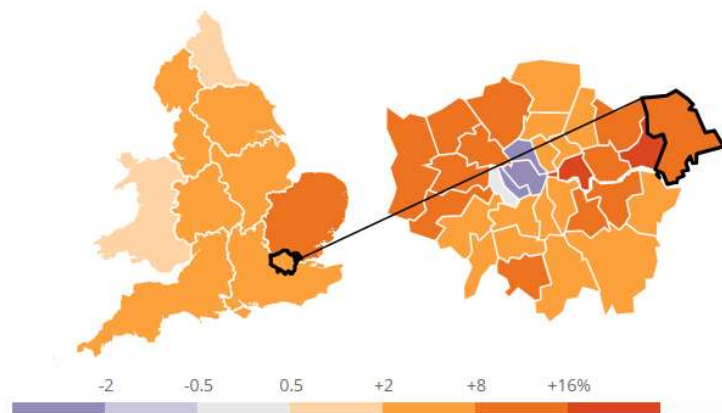
increase in people 2011-2021



Between 2011 and 2021, Havering's median age dropped from 40 to 39, remaining higher than London's overall median (35) but slightly below England's (40). The borough saw a notable 24.3% rise in residents aged 25–34 and a 5.8% decrease in those aged 20–24.

Percentage population change, Havering and surrounding areas, 2011 Census to Census 2021

England ▲6.6% London ▲7.7% Havering ▲10.5%



Source: Office for National Statistics – 2011 Census and Census 2021

Between 2011 and 2021, Havering's population grew by 10.5%, outpacing both London's (7.7%) and England's (6.6%) growth rates.



The largest increase in population will occur among older people. Age group 65–84 is predicted to increase from 39,226 in 2021 to 51,434 in 2036 (31%) and age group 85+ from 7,051 in 2021 to 9,575 in 2036 (36%).

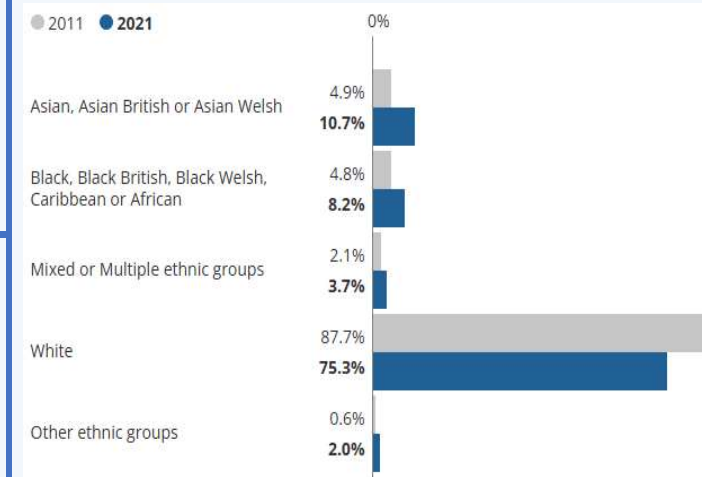


Havering has experienced London's second-largest increase in residents not identifying with any UK national identity, rising from 5.7% in 2011 to 10.3% in 2021. Regionally, the proportion in London increased only slightly, from 22.4% to 22.5%.

The latest census reveals that 79.6% of Havering residents were born in England, a drop from 88.4% in 2011. The Romanian-born population rose sharply from 450 (0.2%) in 2011 to nearly 5,400 (2.1%), while those born in India increased from about 2,300 (1.0%) to 4,600 (1.8%).



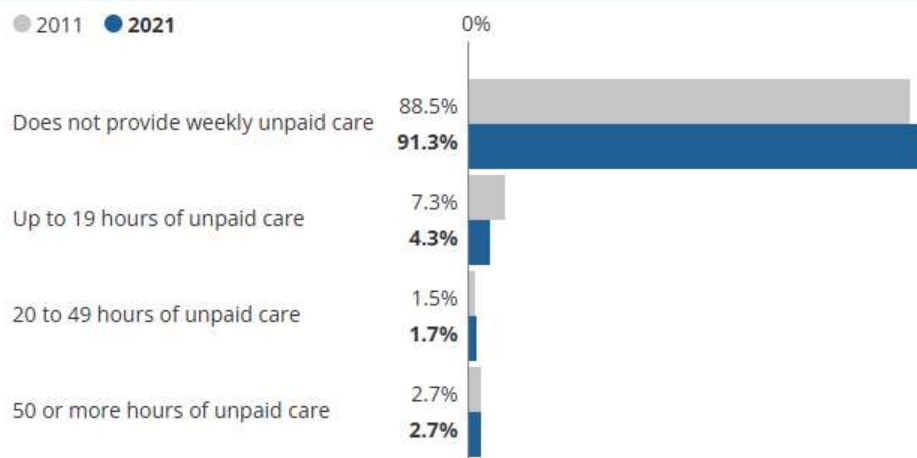
Between 2011 and 2021, Havering saw notable changes in its ethnic composition. The proportion of residents identifying as "Asian, Asian British or Asian Welsh" more than doubled, while those in the "White" category fell from 87.7% to 75.3%. The "Black, Black British, Black Welsh, Caribbean or African" group also grew, as did those identifying as "Mixed or Multiple" ethnic backgrounds. These shifts reflect factors such as migration, ageing, fertility, mortality, and changes in self-identification.



Population density also rose, with around 16.7 people per football pitch-sized area in 2021, compared to 15.1 in 2011. Havering remained the second-least densely populated local authority in London.



Havering experienced one of the largest decreases in the proportion of people providing up to 19 hours of unpaid care weekly, dropping from 7.3% in 2011 to 4.3% in 2021. Only Redbridge and Harrow saw greater declines. Across London, every local authority reported similar reductions, with the regional average falling from 6.4% to 3.8%. These proportions are age-standardised to ensure fair comparison.



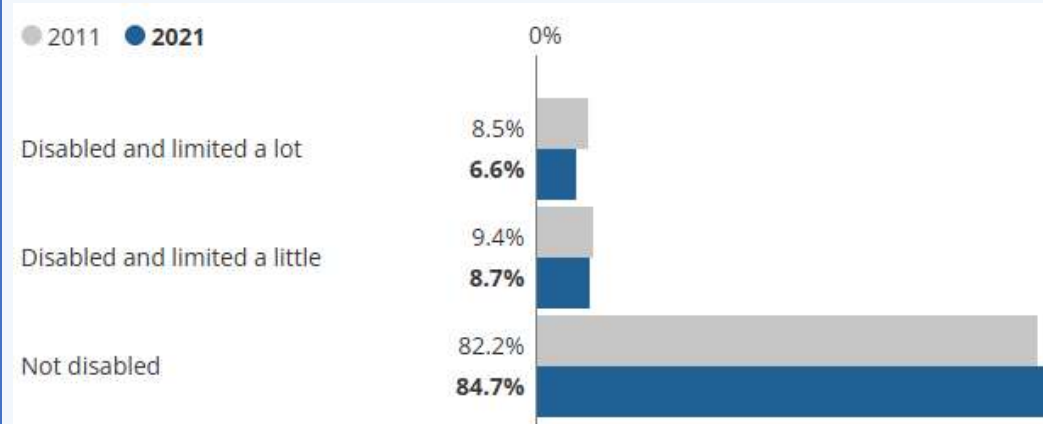
Between 2011 and 2021, Havering saw an increase in employment among people aged 16 and over (excluding full-time students), rising from 57.1% to 58.1%, while employment in England overall declined. Unemployment in Havering fell from 4.0% to 3.2%, and the proportion of retirees also decreased. These figures were influenced by the unique circumstances of the COVID-19 pandemic and related lockdowns.



In Havering, the proportion of residents rating their health as "very good" increased from 44.7% in 2011 to 48.2% in 2021, while those describing their health as "good" fell slightly. Only 1.1% reported "very bad" health, a figure similar to 2011, and those reporting "bad" health decreased from 4.1% to 3.6%. All figures are age-standardised to allow fair comparison across years and regions. The data reflect self-reported health on a five-point scale, and the 2021 Census was held during the COVID-19 pandemic, which may have influenced responses.



The proportion of Havering residents identified as disabled and "limited a lot" fell from 8.5% in 2011 to 6.6% in 2021. This decline, measured using age-standardised proportions, was smaller than the decrease across London (from 9.4% to 7.1%) and England (from 9.1% to 7.5%). The figures may be influenced by the context of the COVID-19 pandemic and changes in census questions, so caution is needed when comparing data across years.



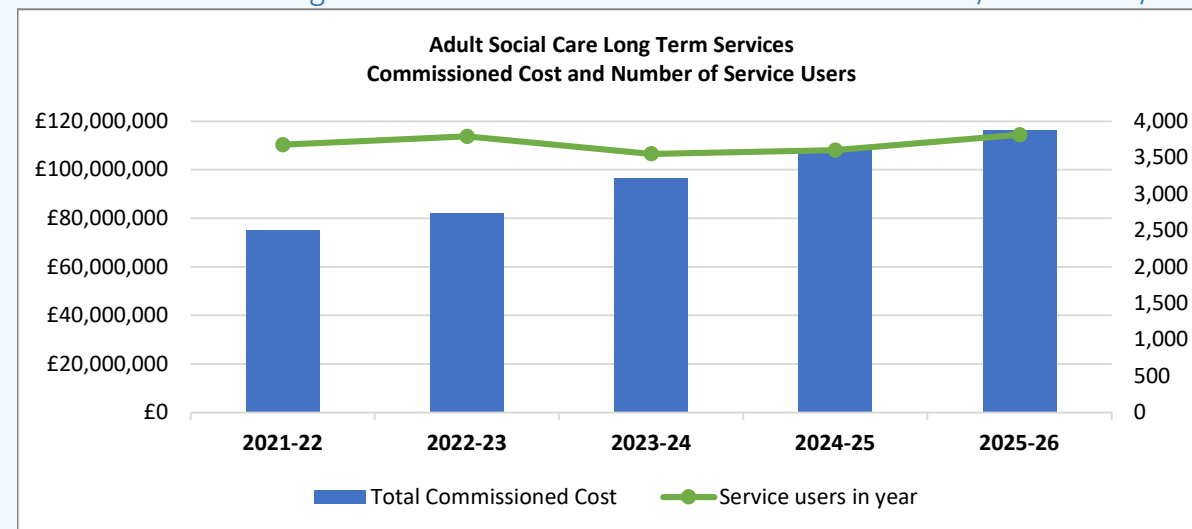
Financial Context

Havering continues to navigate considerable financial pressures, despite a long-standing record of prudent financial management and efficiency. Over the past ten years, the Council has delivered more than £160 million in savings and efficiencies to keep budgets balanced in the face of significant reductions in central government funding. However, these efforts have been undermined by a funding formula that has not been updated for over a decade, leaving Havering persistently underfunded and unable to match its resources to the rapidly changing needs of its population.

The borough has experienced marked demographic shifts, characterised by a quickly expanding young population and the second highest number of older residents in London. This has led to surging demand for social care services for adults. Notably, despite a slight reduction in the actual number of care packages provided, overall spend within adult social care is increasing significantly each year. At the same time, rising living costs and a shortage of affordable housing have escalated the costs of providing temporary accommodation. These trends have placed further strain on already stretched finances.

For the 2025/26 financial year, Havering delivered savings totalling £16.5 million to help address its funding shortfall. Importantly, the Council has had to obtain a Capitalisation Direction grant from central government. This grant permits the use of capital receipts to support revenue spending, ensuring the Council can set a legally balanced budget for the year ahead. Despite these measures, the financial outlook remains challenging, underscoring the need for fairer funding formulas that reflect the borough's unique demographic and social pressures.

Adult Social Care Long Term Services Commissioned Costs from 2021/22 to 2025/26



Number of Service Users by Cohort and Provision Type in 2025/26

Number of Service Users by Cohort and Provision Type in 2025/26		Learning Disability	Mental Health	Physical Support 18 64	Physical Support 65+
Residential	Service Users	118	19	19	447
Nursing	Service Users	5	11	32	365
Homecare	Service Users	70	39	232	1598
Supported Living	Service Users	198	92	41	9
Day Services	Service Users	145	0	42	132

Acceptance of LBH Set Rates March 2026

Elderly/Frail Residential & Nursing Care Homes	LD/MH/PD Residential & Nursing Care Homes	Homecare	Supported Living	Day Services	Direct Payments
70.40%	61.40%	99.70%	98.30%	100%	97.60%

Elderly/Frail Residential & Nursing Care Homes

Havering provides residential and nursing care for elderly/frail individuals, offering 35 care homes (1554 beds) dedicated to this group comprising 18 residential and 17 nursing homes with around 474 beds commissioned by Adult Social Care. These settings deliver safe, compassionate, and person-centred care tailored to the needs of elderly residents, and of the 35 care homes Havering commissions with, 1 (2.9%) is rated 'Outstanding', 32 (91.4%) are rated 'Good', while 2 (5.7%) are rated 'Requires Improvement' by the CQC.

18

Residential Care Homes

1554

Beds Available

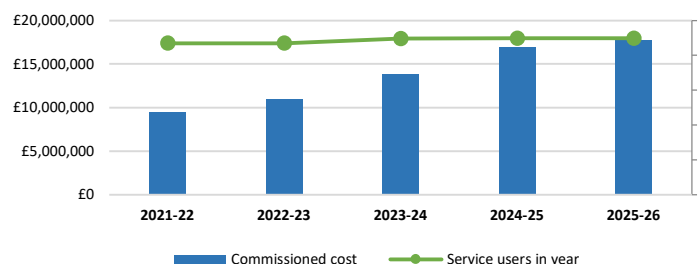
17

Nursing Care Homes

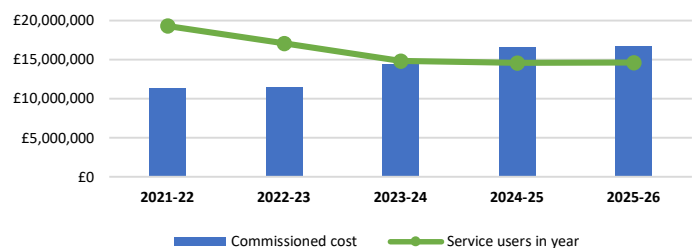
474

Beds Commissioned

Elderly/Frail Residential Care 2025/26 -
Commissioned Cost and Number of Service Users

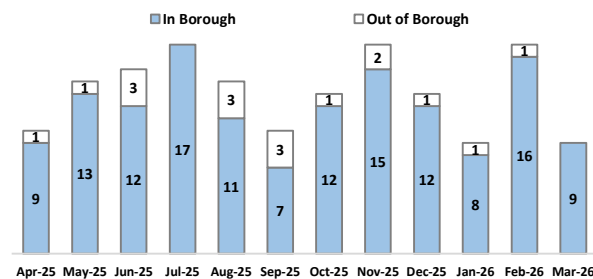


Elderly/Frail Nursing Care 2025/26 -
Commissioned Cost and Number of Service Users

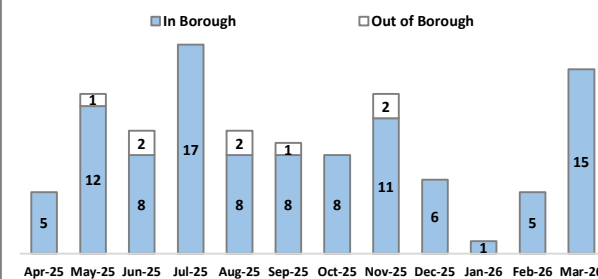


Residential services have seen a constant level in service user numbers, in contrast, nursing services have shown a noticeable decrease in the demand, but costs have increased for both residential and nursing due to annual uplifts that support the move closer to fair cost of care.

Elderly/Frail Residential Care 2025/26 -
New Placements by Month and Location



Elderly/Frail Nursing Care 2025/26 -
New Placements by Month and Location



The market for nursing and residential care for individuals aged 65 and over shows sustained demand, averaging nine new nursing and thirteen new residential placements per month, with 92.9% of nursing and 89.2% of residential placements occurring within the Borough. Although initial weekly costs for both types of care are variable as based on service user need, the steady flow of referrals highlights the ongoing need for strong local provision.

Havering is the largest older adult care home market in Northeast London. Between 2014 and 2026, the number of nursing home beds increased from 930 to 999, while residential beds saw a slight decrease from 625 to 555. Rather than developing new facilities, Havering has prioritised expanding the capacity of its existing care homes. This strategy helps to minimise out-of-borough placements, ensuring residents receive high-quality care close to home. The need for such accessible local provision is set to grow, with demand for placements expected to rise by 16% by 2035 and by 30% by 2045. Additionally, acceptance of the London Borough of Havering's standard care rates has risen to 70% by end of 2025/26, which supports expenditure that is more predictable and brings median care costs in line with council rates.

LD/MH/PD Residential & Nursing Care Homes

Havering provides residential and nursing care for individuals with learning disabilities (LD), mental health (MH) needs, and physical disabilities (PD), offering 19 care homes (153 beds) dedicated to these groups comprising 19 residential and 0 nursing homes with around 57 beds commissioned by Adult Social Care. These settings deliver flexible, specialist support, including therapy and activity programmes run by highly trained staff in safe and inclusive environments, and of the 15 care homes Havering commissions with, 13 (87.8%) are rated 'Good', while 2 (12.5%) are rated 'Requires Improvement' by the CQC.

19

Residential Care Homes

153

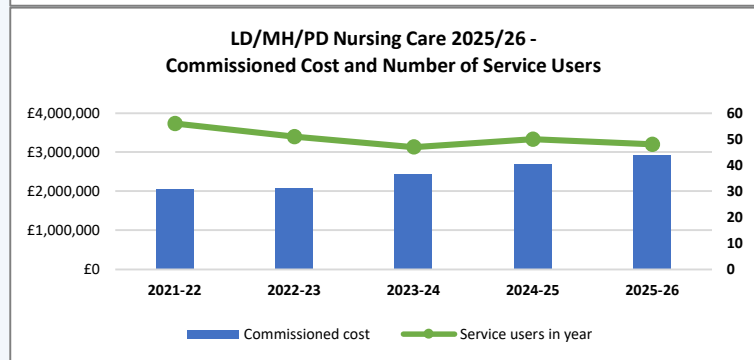
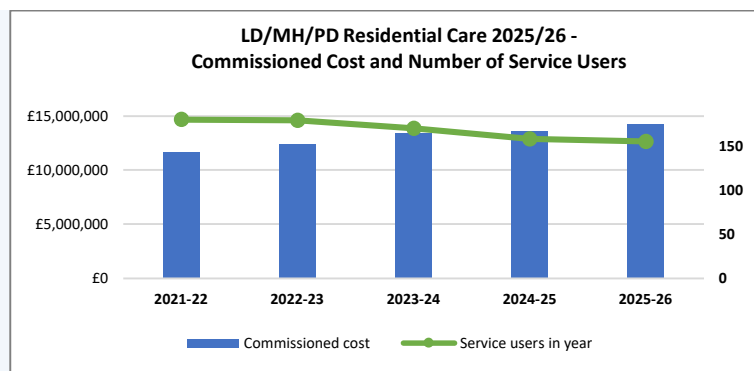
Beds Available

0

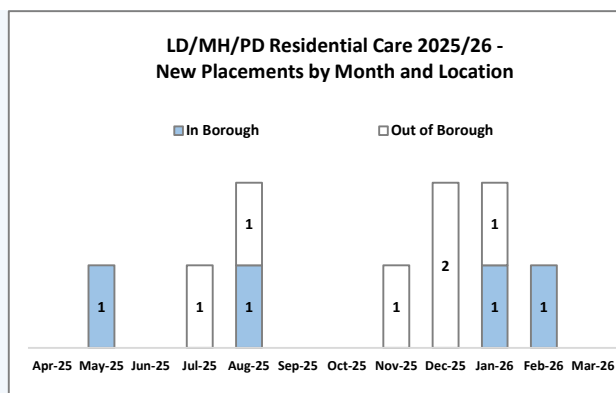
Nursing Care Homes

57

Beds Commissioned



Residential services have seen a slight decrease in service user numbers, in contrast, nursing services have shown some variation in user numbers, but costs have increased for both residential and nursing due to annual uplifts that support the move closer to fair cost of care.



The residential and nursing care market for adults aged 18-64 with physical support, learning disability, or mental health needs shows steady demand, averaging one new residential and one new nursing placements per month. 40% of residential and 31.3% of nursing placements remain within the borough. Initial weekly costs are variable as based on service user need, but the consistent referral rate underscores the ongoing need for local capacity.

Over the next 20 years, demand for residential and nursing care homes for people with learning disabilities (LD), mental health (MH) needs, and physical disabilities (PD) are set to increase. The adult population with learning disabilities is expected to rise by around 9%, mental health disorders by approximately 7.5%, and physical disability-related impaired mobility by 1.6% by 2045. The Council's commissioning approach will prioritise expanding and adapting existing care home capacity for LD, MH, and PD, favouring local provision to reduce out-of-borough placements. Future commissioning will focus on collaborating with providers to enhance quality, invest in and adapt services to meet complex needs, ensuring person-centred care for all residents.

Extra Care

In the London Borough of Havering, the extra care market is structured around block contracts with a single provider delivering services across three schemes. Care costs for Adult Social Care (ASC) funded clients are calculated individually based on assessed needs. Notably, 75% of ASC clients residing in these extra care schemes are aged 65 or over and primarily require physical support, while a further 10% have support needs related to learning disabilities.

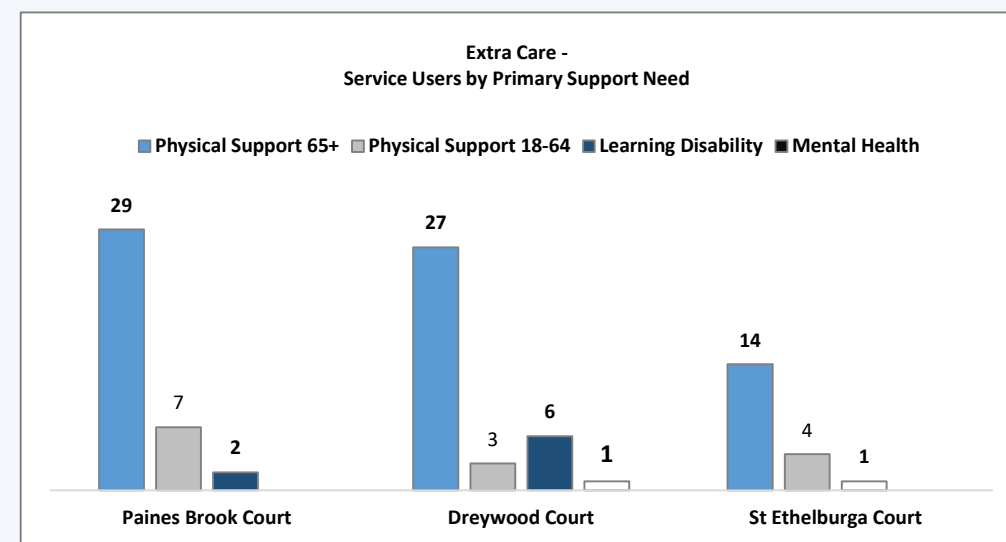
Currently, Havering funds care support packages for 94 residents living independently in flats across Paines Brook Court, Dreywood Court, and St Ethelburga Court. Of these residents, 70 receive single-handed care only, and 24 require some element of double-handed support within their care packages. Across the schemes, weekly care provision totals 1,355.75 hours, with an average of 14.42 hours per week per client, reflecting a tailored approach to meeting diverse and complex care needs in the borough.

Havering has less Extra Care provision than other local boroughs, offering the lowest number of units per 1,000 residents aged 75 and over. However, the three Extra Care schemes currently operating in Havering are notably larger than those in neighbouring areas, with an average of around 65 units per scheme compared to 29.9 to 45.6 elsewhere.

At present, the demand for Extra Care in Havering is 94 units. This is projected to increase to 103 units by 2035, representing a 9.6% rise, and further to 120 units by 2045, which is a 28% increase from the current level. To address this significant projected growth, Havering's future commissioning strategy will prioritise expanding Extra Care capacity, particularly schemes that support individuals with higher dependency needs, while excluding those requiring advanced dementia or nursing care.

The local authority plans to review eligibility criteria, promoting a move away from traditional care home placements for all but the most complex cases. By reconfiguring current schemes and commissioning new schemes tailored to mixed dependency and 18-64 age group, Havering seeks to strengthen the effectiveness of Extra Care and reduce its reliance on residential care homes.

St Ethelburga Court	33 Flats	19 Service Users
Paines Brook Court	64 Flats	38 Service Users
Dreywood Court	98 Flats	37 Service Users



Supported Housing

The supported housing market in Havering is made up of a diverse portfolio of ten commissioned schemes, delivered by various experienced providers. Altogether, these schemes offer 187 self-contained flats, of which 181 are actively commissioned for residents. The provision spans a wide range of client groups including adults with mental health challenges, individuals with learning disabilities and autism, young people leaving care, and people with complex needs such as dual diagnoses or substance misuse issues. The council maintains a robust contract management framework to ensure quality, consistency, and safeguarding across all services. Providers also receive regular training and support to adapt to changing legislation and best practice, with the aim of fostering innovation and flexibility within the market.



There is a clear and persistent upward trend in the demand for supported housing services within the borough. This is particularly evident for stepdown mental health placements enabling individuals to move on from hospital settings and for people with learning disabilities, autism, and other complex or multiple needs. The pressures of winter and continued population growth have all contributed to increased demand. Demographic modelling predicts that by 2030, Havering will require an additional 30–50 supported housing units specifically for individuals with learning disabilities and autism. In response to these trends, the council has prioritised local provision and has recently overseen the development of 14 new units for care leavers and individuals with learning disabilities or autism, which are scheduled to open in 2025. Plans are also underway for a further 14 specialist units, aimed at meeting the needs of the most vulnerable residents and reducing reliance on costly out-of-borough placements.

Havering Council is committed to expanding the local supply of supported housing and reducing the number of residents placed in accommodation outside the borough. Key priorities include the development of new self-contained and shared supported housing schemes, increasing the availability of move-on accommodation, and ensuring that provision is tailored to the distinct needs of groups such as homeless adults, survivors of domestic abuse, and people leaving prison. The council also seeks to create specialist pathways for ex-offenders to support their successful reintegration into the community. Ongoing strategic partnership work, including close collaboration with health, voluntary sector, and housing partners, is central to addressing affordability pressures and delivering a joined-up approach. The council is adapting its procurement and commissioning processes in response to evolving national legislation, ensuring all new developments are sustainable and person centred.

Client Group	Current Provision	Projected Additional Units Needed	Detail of Demand
Mental Health	120	80–100	Especially for those with severe or complex needs
Learning Disabilities	90	60+	Self-contained units for people with complex requirements
Homelessness	150	100+	Move-on units to support single adults exiting temporary accommodation
Domestic Abuse	18	10–15	Additional secure units to ensure safe accommodation
Ex-offenders	10	30+	Units to support effective community reintegration

Home Care

The homecare market in Havering provides essential support to adults who wish to maintain independence and continue living in their own homes. With 1,149 homecare packages and 35 live-in care packages currently in place, most clients (81%) are in the Physical Support 65+ category, whilst 19% require specialist support for learning disabilities, or mental health needs. Package sizes average approximately 15.4 hours per week.

63

Providers

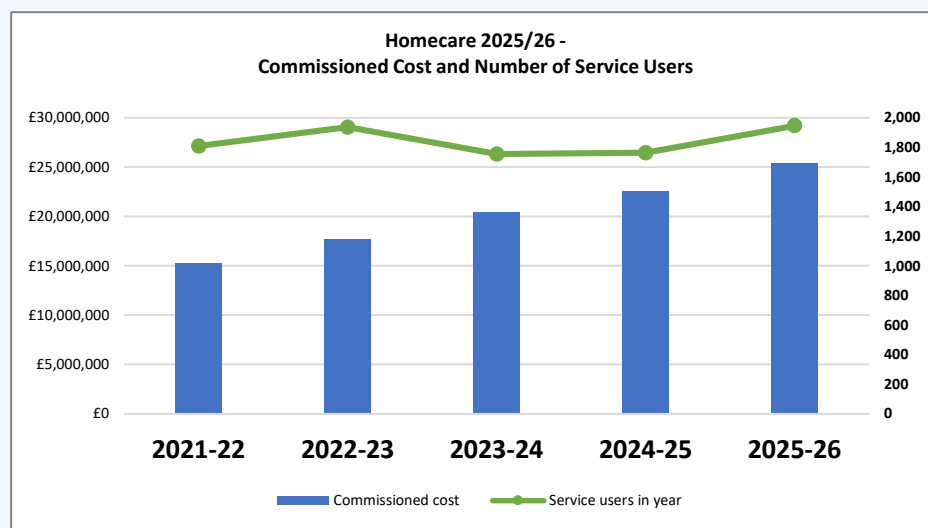
1149

Service Users

15.4hrs

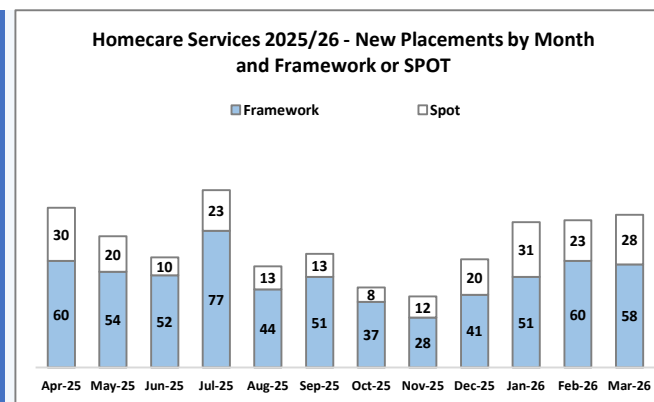
Average Package

The market benefits from a robust network of 15 Framework providers and 49 Spot providers, with Framework providers supporting 70% of clients in the 65+ Physical Support cohort and Spot providers focusing predominantly on those with more specialist needs. The vast majority of standard homecare packages (99.7%) are delivered at the current local authority rate of £25.50 per hour. Only three packages, involving specialist provision such as British Sign Language support, are commissioned at higher rates.



While service user numbers have fluctuated over the period, dipping in 2023/24 before increasing in 2025/26, total spend continues to rise driven not only by annual inflationary increases in the hourly rate, but also by growing complexity such as more hours of care per client.

Of the 63 homecare agencies Havering commissions with, 2 (3.2%) are rated 'Outstanding', 60 (95.3%) are rated 'Good' and 1 (1.6%) is rated 'requires improvement'.



In 2025/26 an average of 70 new homecare services and 1 Live-in care service were started each month, with 72.6% placed with Framework providers and the average initial package size being 14.9 hours per week with 20% of packages having some double handed care.

Havering's homecare sector is currently well resourced, facing few challenges in recruiting and retaining skilled staff. However, with demand for homecare services expected to increase by approximately 16.4% between 2025 and 2035, and by 30.6% from 2025 to 2045, providers will need to adapt by adopting more flexible and innovative practices to meet changing needs. As demographic shifts and local developments continue, the Council's commissioning strategy remains focused on promoting independence helping people stay at home and facilitating timely hospital discharges. The Council is also committed to working closely with providers to encourage ongoing assessment of service users and, where appropriate, to support the careful reduction of care packages, ultimately fostering greater independence.

Supported Living

The supported living market in Havering is designed to enable adults with diverse needs to live independently, with personalised support that helps them develop skills and reduces reliance on intensive care.

69

Provisions / Dwellings

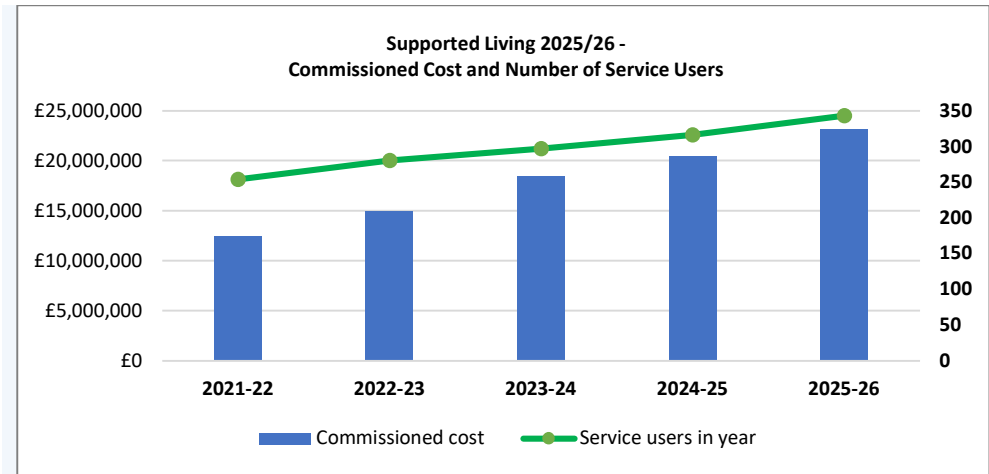
193

Service Users

£1,744

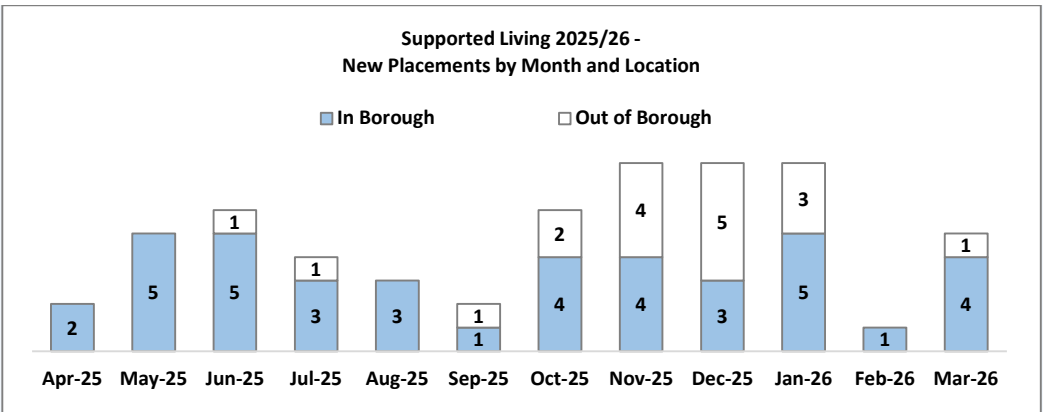
Average Package

There are currently 271 ASC-funded service users in Supported Living, with 193 individuals (71.2%) residing in provisions or dwellings within the borough and 78 (28.8%) placed out of borough. The majority of those placed out of borough are in neighbouring areas, with 50 in LBBD, LBR, or Essex County Council. Of the 193 clients living within the borough, 69.4% have a support need related to learning disabilities. 31 different providers support these individuals across 54 provisions in Havering.



There is a clear upward trend in both the number of individuals supported through Supported Living and the total commissioned expenditure over the last four years. This reflects growing demand and increasing investment in these services. Additionally, the costing model has shifted from a traditional flat weekly rate to a more flexible hourly rate approach, signifying an important change in how services are funded and delivered.

Of the 38 supported living agencies Havering commissions with, 25 (73.5%) are rated ‘Good’, 2 (5.9%) ‘Requires Improvement’ and 7 (20.6%) are unrated by the CQC, with the latter not currently delivering regulated care.



In 2025/26 an average of 5 new supported living services were started each month, with 69% placed with providers in borough.

The sector is currently experiencing high saturation, with 346 provisions available, which far outstrips the average demand. Although the lower-level support on offer is broad and generally comprehensive, there are still notable gaps in the market, particularly regarding highly specialised services. There is an acknowledged need for increased provision tailored to individuals with mental health challenges, forensic backgrounds, self-harming behaviours, and substance misuse issues, as well as accessible accommodation for people with physical disabilities or mobility requirements. This highlights opportunities for targeted market development to address these unmet needs.

Shared Lives

The Shared Lives scheme in Havering forms a vital component of our commitment to enabling residents with care and support needs to live fulfilling, independent lives at the heart of their communities. The commissioned contract, running until 2029, ensures the provision of long-term accommodation and support, short-term respite services, and day support for adults with eligible social care needs, as well as those who fund their care through direct payments.

19

Long Stay Service Users

13

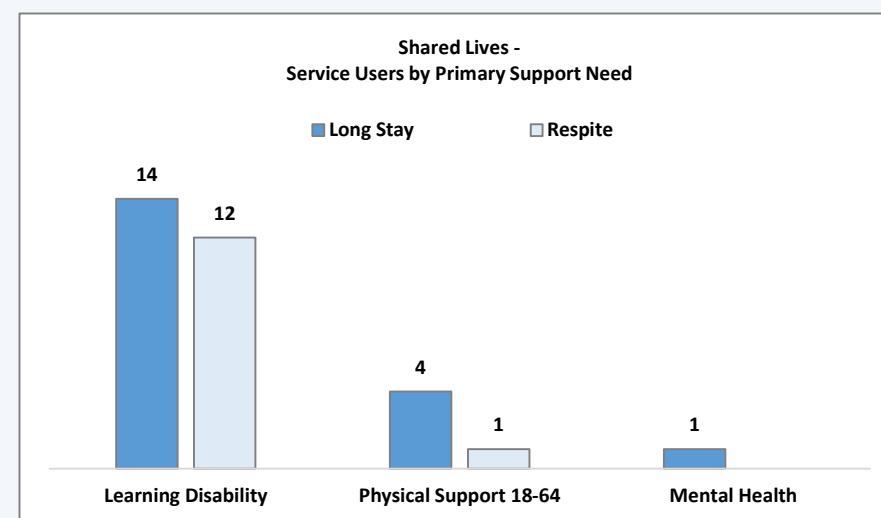
Respite Service Users

Havering's current commissioning of Shared Lives placements is largely focused on adults with learning disabilities. Of the 32 service users who use shared lives, 19 are in Long Stay Placements, with 14 people (74%) receiving support for a learning disability, 4 people (21%) have physical support needs, and 1 person (5%) receive support relating to mental health. In Respite Placements, of the 13 service users 12 (92.3%) have a learning disability. Overall, adults with learning disabilities represent 26 out of 32 service users (81.3%).

Demand for Shared Lives services continues to grow, reflecting national trends and local aspirations for more personalised, preventative models of care. The service is used by a diverse range of individuals, including those with learning disabilities, mental health needs, older people, and those transitioning from hospital or care settings. Outcomes for participants are consistently positive, with many reporting increased well-being, greater social connection, and improved independence.

Looking ahead, Havering's commissioning intentions are focused on expanding the reach and impact of Shared Lives. We are committed to recruiting additional Shared Lives carers and increasing the availability of planned respite placements, ensuring a flexible and responsive offer that aligns with the borough's preventative and personalisation agenda.

Our approach is outcomes-focused, supporting individual, service-level, strategic, and social value goals that benefit clients, carers, and the wider community. By strengthening the infrastructure and capacity of Shared Lives, we aim to offer more residents the opportunity to live as part of an ordinary household, receiving the right support at the right time to maintain their independence and quality of life.



Direct Payments

The direct payments market in Havering is characterised by a strong focus on personalisation, flexibility, and user choice, empowering individuals to shape and manage their own care arrangements. There is a clear commitment to widening access and encouraging creative, independent use of direct payments, supported by a diverse and skilled provider base able to deliver tailored services that fit the varied needs and aspirations of residents.

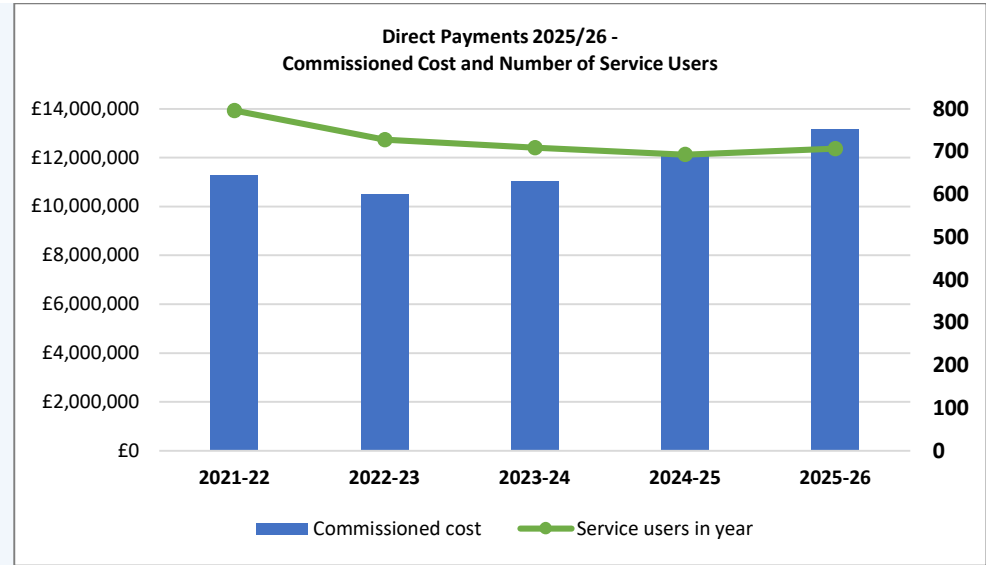
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Direct Payment Types

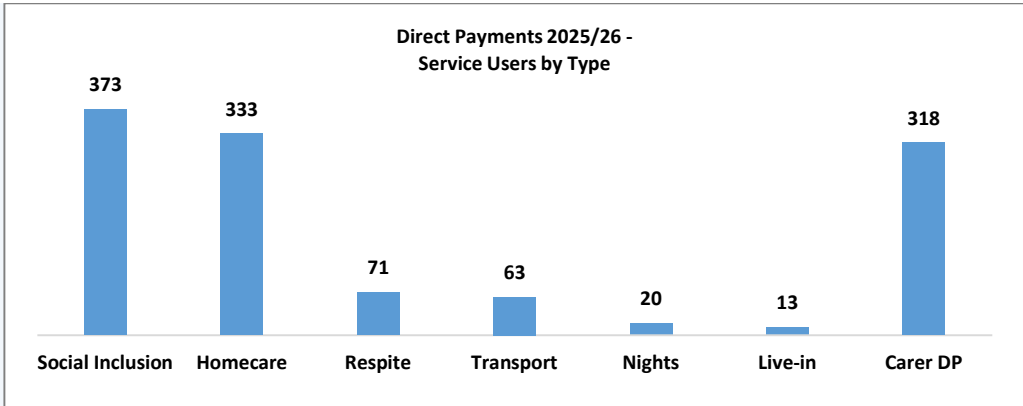
930

Direct Payment Users

Commissioners prioritise innovation, transparency, and responsiveness in provider partnerships, working to minimise barriers, streamline processes, and ensure robust safeguarding and quality assurance. With average packages funded for social inclusion (15.8 hours per week), homecare (20.7 hours per week), transport (9 trips per week), nights (4 per week), and respite (17 days per year), the market offers real opportunities for providers who can deliver accessible, person-centred solutions and contribute to an inclusive, forward-thinking marketplace.



Direct Payment uptake has declined year on year since 2021–22, although 2025–26 shows a gradual increase in service user numbers. Commissioned costs have also risen, particularly in 2024–25, reflecting Havering’s commitment to regularly reviewing and uplifting rates each year. This helps ensure service users can continue to purchase appropriate services and support from the market.



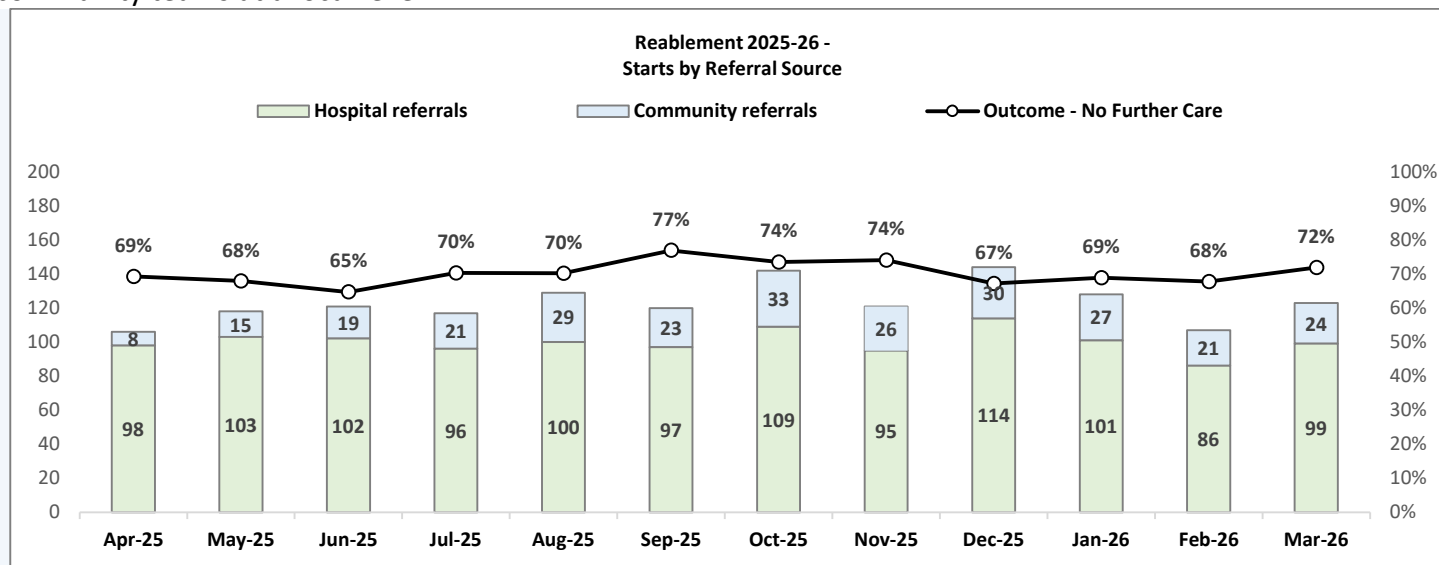
Currently, there are 930 service users in receipt of Direct Payments, with 612 using these funds to meet their care and support needs, and 318 receiving payments as Carers. Direct Payments are classified according to the type of care and support they provide. Of the clients accessing Direct Payments to fund their care and support, 49% have learning disability (LD) needs, 24% have physical support (PS) needs aged 18–64, 26% have PS needs aged 65 and over and 1% have mental health needs. Clients with physical support needs mainly use direct Payments for homecare across all age groups, while Direct Payments for social inclusion, respite, and transport are predominantly utilised by clients with learning disability needs.

Reablement

The Reablement service is central to Havering's strategy for helping residents regain independence and confidence after illness or hospital stays. The service is currently delivered by Essex Cares Limited (ECL), who work in partnership with the Council and key partners across both health and social care to offer swift, time-limited support focused on rebuilding practical skills and independence at home.

In addition to the discharge pathway into Reablement there is an established pathway from the Community via both the ASC front door and directly from primary care. This model maximises independence, prevents unnecessary hospital admissions, and connects residents with broader community support. Long-term care needs are only considered before reablement in exceptional cases, underlining Havering's commitment to supporting independent living for as long as possible.

It is expected that the future Reablement model in Havering will align with the development of Neighbourhood health, ensuring a more cohesive approach across community teams at a local level.



Annual reablement data shows a steady increase in activity. Most referrals are from hospital sources (81.3%) and involve people with no prior package of care, with community referrals, including those from PCNs, making up the remainder. On average, 74.3% of hospital referrals and 55% of community referrals result in no further care following reablement. Community reablement activity increased in 2025–26 through new initiatives. Across all referral sources in 2025–26, 70% of episodes required no further care, while 30% resulted in ASC-funded packages.

Supporting Independence and Reducing Long-Term Care

Havering's Home First approach is designed to give residents every opportunity to recover at home prior to any decisions being made about longer term care needs. Following a stay in hospital, assessments are undertaken in the person's home environment, enabling a more accurate understanding of the individual's capabilities and support requirements. This often results in lower levels of care than would otherwise be suggested when the person is assessed in an acute environment. By providing short-term, focused reablement interventions and linking residents to community and voluntary sector resources, the service helps prevent or delay the need for ongoing, intensive packages of care.

Respite

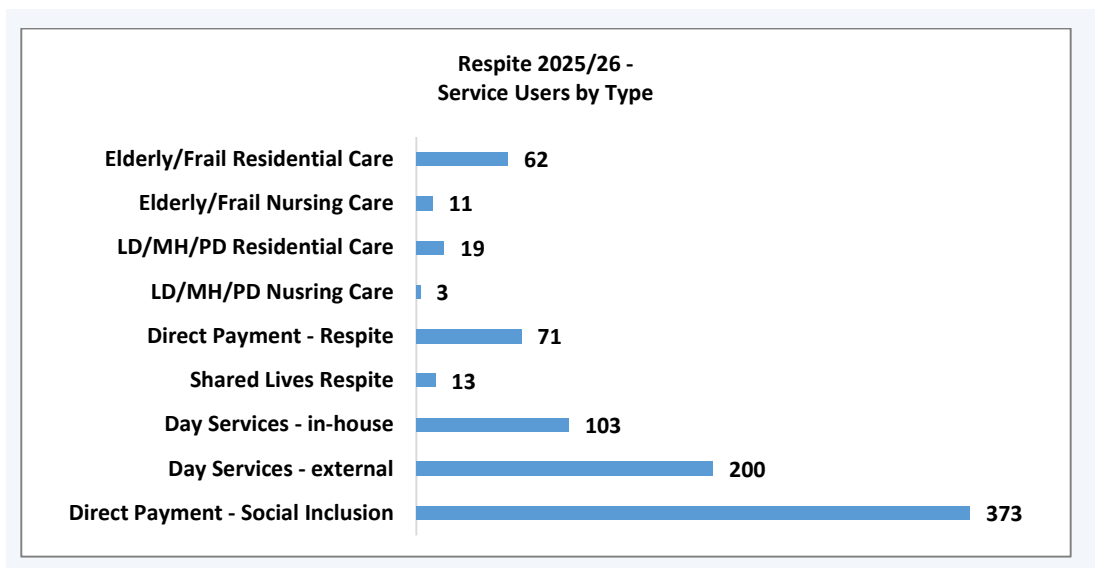
Respite provision in Havering is a cornerstone of our preventative care strategy, delivering essential support that enables carers and families to maintain their own wellbeing while ensuring high quality, person-centred care for those they support. Our market position reflects a commitment to commissioning flexible respite options tailored to the diverse needs of our local community. We firmly recognise that respite must be person-specific, as the needs and preferences of individuals and carers vary widely; there is no one-size-fits-all approach to providing respite care.

We recognise that effective respite care must take multiple forms to accommodate individual circumstances. In Havering, this includes residential respite placements, where individuals can benefit from specialist care in dedicated settings, as well as community-based options such as day services and activities at local centres. Home-based provision remains a vital offer, providing tailored support within familiar surroundings, which can be particularly reassuring for both carers and those receiving care. However, we acknowledge there is currently a shortage of residential respite within the borough. Addressing this gap is a priority, and we are committed to working closely with providers to increase capacity and ensure that individuals and carers have timely access to residential respite when required.

Carer-focused respite is another key strand, ensuring that informal carers are empowered to take breaks and maintain their own health. Direct payments allow families to make choices about their respite arrangements, fostering independence and flexibility in the support they access. The Shared Lives scheme further expands our offer, providing opportunities for individuals to experience respite in supportive family homes, promoting inclusion and meaningful relationships.

Our collaborative approach bringing together social work, commissioning, and brokerage teams enables us to identify service gaps, allocate resources efficiently, and continuously improve our offer. This ensures that respite provision in Havering is not only varied, but also responsive to changing needs and aspirations. We will continue to work in partnership with local providers and stakeholders to develop innovative solutions and expand the range of respite options available, particularly around residential respite. We are committed to working with providers to innovate and develop new models of respite, ensuring every individual and carer has access to the right support at the right time.

Through ongoing engagement and partnership with the local community and service providers, Havering aims to create a resilient, high-quality respite market that upholds choice, flexibility and person-centred values.



Wellbeing & Prevention

Havering is dedicated to supporting residents' health and wellbeing through a strong range of preventative services that promote independence, activity, and community connection. We prioritise early intervention to reduce the need for intensive care, collaborating with the NHS, voluntary sector, and community partners to deliver coordinated services that build resilience and tackle wider health determinants. Up-to-date information and resources are available via the Havering Live Well website and Joy App, linking people to local groups and wellbeing services.

There is continued high demand for preventative support in Havering, driven by our diverse, ageing population. We remain committed to greater integration with partners, aligning services to the Better Living Model, and fostering a diverse provider marketplace. The Council's ongoing focus is on prevention, early intervention, and reducing health inequalities by pooling resources with partners.

Our key areas of focus are:

Advocacy

Advocacy is integral to empowering residents to be active partners in their care and support. The Council currently commissions a statutory independent advocacy service, which covers Independent Mental Health Advocacy (IMHA), Independent Mental Capacity Advocacy (IMCA) including Deprivation of Liberty Safeguards (DoLS), Care Act Advocacy, and NHS Complaints Advocacy. We also collaborate with local advocacy groups to offer a variety of options tailored to individual needs, ensuring everyone has access to high-quality advocacy that promotes independence, rights, and involvement in decision-making.

Community Prevention Model

Havering commissions the Ageing & Living Well Community Wellness & Empowerment Services to ensure residents receive tailored, inclusive support that enhances their health, wellbeing, and independence. By collaborating with specialist organisations and establishing clear service agreements, the services prioritise transparency, fairness, and efficient resource use, while fostering partnerships that deliver holistic, person-centred care across the borough. This approach not only aims to improve quality of life of residents but also reduces reliance on statutory services and supports a resilient, cohesive community.

Dementia

Havering commissions an inclusive, non-clinical Dementia Support service, providing tailored support for individuals at every stage of their dementia journey and for their carers. The service promotes independence, wellbeing, and social inclusion, offering early intervention, information, and practical tools that reduce hospital admissions and empower people to remain well at home and within their communities. By prioritising diversity and accessibility, the service is designed to meet the unique needs of Havering's population, supporting improved health outcomes and easing pressure on the healthcare system.

Carers

Havering's Support Service for Unpaid Carers provides a central hub for information, training, peer support, tailored activities, and flexible respite. Working in partnership with health agencies and specialist organisations, the service identifies and supports carers, referring them for assessments where appropriate. The team works proactively to reach hidden or underrepresented carers, ensuring no one is overlooked. A wide range of support is offered, including emotional and peer support, social events, and online forums, ensuring carers' wellbeing is prioritised and their diverse needs are met, with the service regularly reviewing and adapting its offerings based on carers' feedback.

Working with Havering

We are committed to working collaboratively with our providers to ensure services are outcome-focused, empowering individuals with greater choice and control whilst supporting them to achieve their aspirations. We value establishing fair and transparent working relationships with all commissioned providers, fostering open communication, mutual respect, and shared responsibility. By prioritising clarity and equity in our partnerships, we aim to build trust and accountability, ensuring that together we deliver high-quality, person-centred services for our residents.

We seek providers who will....

- Embrace our ambitions and Havering Values
- Promote wellbeing, recovery, and independence
- Support individuals to form and maintain meaningful friendships and relationships
- Assist people in moving to the most suitable accommodation for their needs
- Deliver the right support at the right time and in the right place
- Be flexible and responsive to changing needs
- Be thoughtful in matching support workers to individuals, considering interests, compatibility, and where appropriate preferences, recognising that who provides support is as important as the support itself
- Maintain the highest quality standards
- Work closely with other services to ensure both residents and their families are well supported and fully informed
- Ensure their services are an integral part of local communities, fostering connections with voluntary organisations and other community resources
- Achieve 'Good' or 'Outstanding' ratings from the Care Quality Commission (CQC)
- Build a diverse workforce reflecting the communities they serve

Our expectations of Providers are that they will....

- Demonstrate responsiveness, adaptability, and innovation
- Exhibit strong business acumen and a professional approach
- Deliver the types and levels of care that Havering residents want and require
- Maintain a Havering-centred focus
- Have robust business continuity plans in place
- Prioritise the wellbeing and development of their staff
- Ensure that the maximum proportion of fees is allocated directly to service delivery
- Operate in an open and transparent manner with Havering and with other providers to achieve the best outcomes for residents
- Have access to and utilise appropriate technology and systems to deliver services, facilitate communication and support reporting requirements

Social Value

At Havering Council, our goal is to ensure every pound spent generates the greatest possible value for local people. We strive to enhance the quality of life for residents by focusing not only on cost, but also on how resources can be used to maximise positive impact and create lasting change in our borough. When planning and delivering services, we actively seek opportunities to boost social value and promote equality.

We expect our providers to do the same considering how their service delivery and any added contributions can benefit Havering through:

- Creating jobs and economic opportunities for local people
- Improving wellbeing and community cohesion
- Reducing environmental harm and supporting sustainability

All partners should align their efforts with the priorities most important to residents, making sure that limited resources are allocated for the greatest collective benefit. Collaboration, innovation, and a commitment to social value are essential for Havering’s future prosperity.

Havering Council’s Social Value Priorities

Our market position is shaped by a clear set of social value priorities, which guide contracts, commissioning, and partnerships. By embedding these principles, we aim to deliver measurable improvements in economic growth, social wellbeing, and environmental sustainability for everyone in Havering.

Promote Local Skills and Employment	Supporting training, apprenticeships, and employment opportunities for residents
Supporting the Local Economy and Growth	Enabling local businesses to thrive, encouraging investment, and fostering sustainable economic development
Protecting and Improving the Environment	Reducing carbon emissions, safeguarding green spaces, and encouraging environmentally friendly practices
Healthier, Safer and more resilient Communities	Promoting health and wellbeing, safeguarding vulnerable people, and strengthening communities

Environment & Climate Change Commitments

Havering is dedicated to driving robust action on climate change and environmental sustainability, with a clear goal to achieve carbon neutrality by 2040. We invite all prospective providers to play a pivotal role in supporting this ambition, ensuring our community remains resilient, healthy, and forward-looking for generations to come.

Our strategic direction hinges on nine key work streams, each offering significant opportunities for providers to contribute meaningful expertise, innovation, and resources:

- **Built Environment:** We encourage providers to offer solutions for energy-efficient, zero-carbon homes and buildings, whether through design, construction, retrofitting, or consultancy.
- **Business Continuity:** Your support in preparing local organisations and communities to adapt to environmental risks and extreme weather will help build a more resilient Havering.
- **Energy:** Providers can help us shift council properties and local businesses to sustainable energy sources, ensuring efficient implementation of low-carbon technologies and practices.
- **People:** We seek partners who can empower residents and employers with green skills, training, and initiatives that foster sustainable behaviour and community engagement.
- **Procurement:** We welcome providers who prioritise sustainability and carbon neutrality in their supply chains, helping us make responsible purchasing decisions.
- **Public Protection:** There is a need for innovative approaches to improving air quality and creating comfortable, energy-efficient homes—your input here is essential.
- **Stakeholder & Community:** Collaborate with us on climate action projects, engaging local stakeholders and community groups to maximise impact and share responsibility.
- **Transport:** Providers can drive progress by investing in sustainable travel options and active travel infrastructure, helping to reduce transport emissions across the borough.
- **Waste:** We need partners committed to improving rates of recycling, reuse, and responsible waste management, supporting Havering's ambition to minimise environmental impact.

We recognise that our climate goals will only be realised through effective partnership, creativity, and innovation. As policies and priorities evolve including alignment with the Climate Change Act 2008, Paris Agreement 2015, and the United Nations Sustainable Development Goals providers are encouraged to work with us dynamically, ensuring Havering stays at the forefront of climate action. We invite all prospective providers to bring their expertise and commitment, helping Havering deliver a greener, safer future for all.

Our Promise to Providers

In line with Havering's market position statement, our priority remains with contracted providers who demonstrate strong working relationships with the council. However, to all providers delivering Adult Social Care services within Havering, we make the following commitments:

- 1 To foster collaboration and maintain open, ongoing communication, co producing services alongside stakeholders
- 2 To ensure contracting arrangements are aligned with Havering's market position statement and strategic direction
- 3 To implement meaningful performance measures that drive continuous improvement across services
- 4 To guarantee timely payment to all providers
- 5 To build and support strategic partnerships with providers rooted in the local community
- 6 To encourage diversity within service provision
- 7 To promote a high quality offer by supporting workforce recruitment, retention, and development, including access to training
- 8 To uphold fair cost structures
- 9 To provide a level playing field for smaller, independent providers as well as national organisations
- 10 To maintain a proactive focus on market failure and commission providers of last resort where needed

Additional Information



As part of our ongoing commitment to supporting local care services, we are pleased to introduce the Havering Care Association to all providers in our borough. For over twenty years, this Association has been at the heart of our care community, championing the interests of providers across elderly, domiciliary, learning disability, and mental health sectors. By becoming a member, you will have the opportunity to collaborate closely with both the Local Authority and fellow providers, ensuring your voice is central to shaping future care provision.

Membership offers exclusive benefits, including access to regular networking events, and professional development resources. Through our partnership with Care Providers Voice Northeast London, you will also enjoy free recruitment support, accredited online training in over 110 languages, and access to a sector-based academy. We encourage you to join the Havering Care Association and play a proactive role in driving excellence, workforce development, and innovation within our sector. To sign up or learn more, please visit their website at www.cpvnel.com.



Havering Virtual School, in partnership with Flourish, offers LA funded access to 120 CPD-accredited training courses including mandatory training for providers within the Local Authority.

Delivered through a user-friendly eLearning platform, this initiative ensures education and social care professionals can upskill at no cost. In addition to funded course bundles, providers can benefit from further resources, including access to a free staffing platform and community network.

Havering Care Provider Hub

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| 2. Market shaping | 6. Supported Living Services |
| 3. Becoming a provider in Havering | 7. Rate uplifts |
| 4. Residential and Nursing Care Services | |

Further information for providers can be found on our website:
<https://www.havering.gov.uk/adult-social-care/care-provider-hub>

Havering Quality Outcomes Team

The Havering Quality Outcomes Team plays a central role in assuring the safety and quality of care and support services across the borough. Working in partnership with providers, health partners, council teams, and external organisations, the team promotes good practice, monitors compliance with regulatory and contractual standards, and facilitates improvements where needed. Through regular engagement with providers as well as conducting visits, the team ensures that providers are well informed of expectations and required standards.

In cases where concerns persist, appropriate sanctions, including suspension of placements, may be applied to safeguard residents' interests. All providers are expected to cooperate fully with the Quality Outcomes Team to support a sustainable, high-quality care market in Havering.

Conclusion

Thank you for taking the time to read the Market Position Statement 2026-2031. We appreciate your commitment to delivering high-quality adult care and support services across Havering. This statement has outlined our strategic vision for the future, including our ambition to expand and strengthen the local care market in line with the duties set out in the Care Act 2014. Key to our approach is the introduction of the Adult Commissioned Placement (ACP) Framework, which will unify Residential and Nursing Care Homes, Homecare, and Supported Living Placements under a single structure from 2026 to 2030. This will ensure a greater emphasis on standardisation, person-centred care, and continuous improvement.

We have highlighted the importance of adopting a whole-family perspective in service delivery, fostering innovation, and working collaboratively across organisations and sectors. Upholding the highest quality standards, understanding local demand, and transparently measuring the impact of your services all remain crucial.

As part of our ongoing evaluation of the local market, several key gaps have been identified which must be addressed to ensure our care provision meets the needs of all Havering residents. These gaps include:

- Shortage of residential respite care within the borough, limiting support for carers and families in need of temporary relief.
- Need for additional supported housing units, especially for individuals with learning disabilities, autism, and complex needs, to promote independent living and tailored support.
- Projected increase in demand for Extra Care units by 2045, requiring expansion and development of these specialist housing options for older adults and those with complex needs.
- Need for the homecare sector to adapt to rising demand and growing complexity of care needs, ensuring sufficient capacity and skills across the workforce.
- Shortage of highly specialised supported living services for people facing mental health challenges, those with forensic backgrounds, and individuals affected by substance misuse, to provide targeted, effective support in the community.

We also recognise the importance of avoiding unnecessary duplication of services and ensuring that provision is both efficient and responsive to local needs. By clearly identifying these gaps, we encourage providers, commissioners, and stakeholders to work collaboratively in designing solutions and shaping the future care landscape.

Through this statement, our aim is to promote a shared understanding of local care market needs, future commissioning intentions, and the challenges and opportunities ahead. We value the dedication and expertise of all our providers and remain committed to fostering fair, transparent, and collaborative working relationships. By working together, we can ensure that Havering residents receive the best possible outcomes from their care and support services.

Key Related Documents

The Care Act 2014	Care Act 2014 Part 1: factsheets - GOV.UK
Equalities Act 2010	Equality Act 2010: how it might affect you - GOV.UK
Public Services Act 2012	Social Value Act: information and resources - GOV.UK
Mental Capacity Act 2005	Mental Capacity Act: making decisions - GOV.UK
Human Rights Act 1998	The Human Rights Act EHRC
People at the Heart of Care 2021	People at the Heart of Care: adult social care reform white paper - GOV.UK
Liberty Protection Safeguards (LPS) 2022	Liberty Protection Safeguards: what they are - GOV.UK
UN Convention on the Rights of Persons with Disabilities	Convention on the Rights of Persons with Disabilities (CRPD) Division for Inclusive Social Development (DISD)
CQC	Care Quality Commission
NICE Guidelines	Find guidance NICE
Prevention & Public Health	NHS England » Public Health and Prevention

