



Setting Standards for  
Retirement Communities

# Annual Review 2020

September 2019 to August 2020



Building a better future.....	1
Welcome.....	2
Market Overview.....	4
Vision 2030.....	6
Media Coverage.....	10
Policy.....	12
Supporting the sector in the covid crisis.....	16
Sector Leading Events.....	18
Our Key Conference Goes Digital.....	20
Robust Standards.....	24
Strong and Effective Governance.....	26
ARCO Approved Operators.....	30
Members, Partners, Accelerator Programme, Supporters.....	32
Affiliate Network.....	34
Looking Forward.....	36

## About ARCO

Founded in 2012, ARCO (Associated Retirement Community Operators) is the main body representing both private and not-for-profit operators of Retirement Communities in the UK. We work in three distinct areas, each vital in supporting our Members and growing the sector that helps people to live independently for longer.

### • Setting the Policy Agenda

Delivered through policy campaigning work with MPs, Peers, Government Ministers, Local Authorities and other key sector stakeholders to influence the future of much-needed sector-specific legislation.

### • Compliance & Regulation

Delivered through our Consumer Code and standards framework, with continual assessments of Members to drive high standards for customer and resident experience.

### • Knowledge Sharing and Best Practice

Delivered through our extensive events programme, annual What Next? Conference, Network bulletins, online Knowledge Bank, and ARCO Analytics.

## Our Mission

ARCO believes that meaningful, long-lasting partnerships and commitments are at the heart of solving the challenge of meeting the housing, care, and support needs of our ageing population.

### We emphatically believe that older people should:

- Be treated with respect and dignity.
- Be valued for their contributions to society and to their communities.
- Have what they need to be happy and healthy, including access to good support, care, and health services.
- Be enabled and supported to live independently for as long as possible.
- Be empowered and free to make informed choices.

ARCO are incredibly grateful for the support we received this past year from our Strategic Partners:



Castleoak delivers specialist development and construction solutions to the care, assisted and retirement living sector.

[castleoak.co.uk](http://castleoak.co.uk)



Nicol Thomas is an integrated architectural design and project management practice with experience of delivering over 3500 extra care apartments across 18 Retirement Communities.

[nicolthomas.co.uk](http://nicolthomas.co.uk)



Working with operators, developers and landowners, Octopus invests in exceptional healthcare facilities you'd choose for your loved ones.

[octopushealthcare.com](http://octopushealthcare.com)



Trowers & Hamlins is a leading international law firm with a specialist practice in health and social care.

[trowers.com](http://trowers.com)



Badenoch + Clark connect the right people with the right opportunities and specialise in a range of recruitment solutions for the sector.

[badenochandclark.com](http://badenochandclark.com)



Sherpa aligns strategic, operational and human objectives to transform sales culture and drive results.

[sherpacrm.com](http://sherpacrm.com)

# Building a *better* future



**There are very few sectors which will be prepared to make firm predictions about 2021 or the years beyond. 2020 has shaken the kaleidoscope so much that for many it is too soon to discern the **new patterns** which have emerged.**

Yet amongst the chaos, some fundamentals remain and appear more certain than ever.

Amongst those is the huge unmet need for Retirement Communities in the UK.

Driven by an ageing population, a creaking social care system and older people valuing their later years more than ever before, expecting to be able to spend them well and to have the support they may need to be independent for longer – Retirement Communities are the answer.

Working together with a growing coalition of supporters who can see this, we are on the cusp of building a *better and brighter future for hundreds of thousands of older people.*

**Retirement Communities are the answer**

2019-2020 was a year  
in which our sector was  
tried, tested and came out  
stronger.



Welcome



**Nick Sanderson**  
Chair, ARCO



**Jane Ashcroft CBE**  
Vice-Chair, ARCO

**We continued to see significant growth in membership and partnership – and great growth in our external and political alliances and influence. Whilst supporting members with day-to-day challenges during the coronavirus crisis we also delivered a high quality series of internal and external facing events and released a number of thought leadership reports which are shaping policy thinking on our area, as well as advocating on our members’ behalf for the support and clarity they needed from Government. We achieved record levels of media and social media engagement and continued to develop our standards programme, ensuring that it fits in with and helps to influence the external regulatory environment which is gradually taking shape.**

2020 turned out to be a very different year to what any of us would have expected. Whilst the fundamental need for our sector remains unchanged, and has in many ways been brought into sharper relief, there was inevitably quite a different shape to much of our activity. The silver thread throughout all of this was ARCO continuing to work tirelessly for the interests of our members – just as members continued to do so for their residents.

When the coronavirus first hit, ARCO members demonstrated not just operational excellence in responding so rapidly to protect the safety of residents, but also the inherent value of the Retirement Community model in helping people to isolate effectively whilst going on receiving support and care as needed.

ARCO was well positioned going into this crisis, having established strong links with the Department of Health and Social Care, the Ministry of Housing Communities and Local Government, the Care Quality Commission, the Association of Directors of Adult Social Services and the Care Providers Alliance amongst others. ARCO put all of these at the disposal of members, as well as our communications channels including our website, newsletters and member calls to ensure that the sector was as well informed and supported as possible.

Having to cancel our annual conference was a difficult decision, but the right one. We showed our adaptability by replacing it with a very well attended digital season featuring a wide range of member events and external facing events with partners, attended by more than 1,500 participants.

At the end of this period we were privileged to be able to honour some of our front line staff who had made a major difference to residents’ lives during the coronavirus crisis in our Roll of Recognition.

Alongside all of this we have continued to push for the regulatory and policy changes which will support our sector’s growth, particularly in relation to leasehold reform, planning, deferred fees and building safety as well as building our political, media and social media profile. We have also continued to set and push for high standards on behalf of our residents.

We are delighted to have welcomed so many new partners this year, demonstrating the value which investors and suppliers continue to see in our sector.

From a resident perspective it is also clear that we are seeing a significant growth in interest which is set to be a permanent feature of the landscape in the years ahead.

On the affordable rented part of our sector, demand for and delivery of extra care schemes (in receipt of public funding) keeps growing and councils are increasingly looking for our members to play a bigger role in their social care provision. We continue to see a move towards specialisation when it comes to providers of extra care – with general needs housing associations not already active in the sector hesitant to expand operations due to the complexity of the offer, a lack of specialist skills, and funding concerns (particularly on the social care commissioning side). This means that those housing association and not for profit members who are capable of delivering high quality housing-with-care are likely to be increasingly in demand across the country.

The private payer market (which although growing rapidly currently only constitutes around 1/3 of the total market for housing-with-care) has continued to see very strong interest from prospective residents even during the lockdown, as people seek the security, certainty and social connection which Retirement Communities offer. This has been matched by growing interest from new entrants, and existing providers expanding (and in some cases rethinking) their offer. A key trend at this time is the move towards a redistribution of risk away from residents and towards operators, which is being mainly driven by customer demand. In particular, this growth has been noticeable in the mid-market, which has been vastly underprovided for thus far and in which most older people find themselves.

With Brexit uncertainty being replaced by election uncertainty then by coronavirus induced political lockdown, we have not seen the pace of policy and regulatory reform we would have hoped for. Ultimately though, the challenges of the wider care sector are likely to lead to a renewed focus on care, housing and the economy in the year ahead – all of which should present significant growth opportunities for our resident-centred model in future.

# Market Overview

ARCO is dedicated to meeting the housing, support, and care needs of the UK's ageing population. Therefore, our vision is for 250,000 people to live in Retirement Communities by 2030.



**VISION2030**  
in **six** key numbers

- 1** Currently about **75,000** people live in Retirement Communities
- 2** In the next 30 years the number of over 75s in the UK will **DOUBLE**
- 3** Our sector's vision is to provide for **250,000** people by 2030
- 4** In achieving this, our sector's turnover will be over **£70bn** until 2030 and we'll need to invest £40bn by then
- 5** This will deliver **£5.6bn** savings for the UK's health and social care systems until 2030
- 6** And release over **562,500** bedrooms into the general housing market



# Vision 2030

- Continued to grow our group of Vision 2030 Supporters in Parliament, business and the world of charities.
- Extensive write-out programme to all parties, MPs and Parliamentary candidates working with our members ahead of the General Election.
- Featured Vision 2030 as the key part of our discussions in over 80 meetings with key Parliamentarians.
- Secured over 400 mentions of ARCO and our sector in the media, including record reach in national newspapers and television and radio, as well as in trade press in local government, policy, planning, business, health, social care and housing.
- Tripled our online and social media reach through Twitter, LinkedIn and our website.
- Secured over 20 mentions and questions in Parliament of our sector, including an Early Day Motion dedicated to growing Retirement Communities.
- ARCO conducted at least a dozen public presentations on the Vision, and several members have as well – the message is getting out there.



## A clear customer proposition

- Lobbied the Government for clarity on a multitude of fronts, though letters, responses to APPG consultations and Select Committee reviews, our work with MHCLG and DHSC.
- Produced several briefing sheets and collateral on Retirement Communities including our Task Force documentation.
- Worked with the EAC to help them revise and improve the definitions used in their database.



## Effective self-regulation

- Delivered our regular standards and compliance programme throughout the year.
- Revised our standards programme in light of the review findings, to make it even more effective and focused on consumers.
- Continued to engage with the Regulation of Property Agents (ROPA) working group as it issued its final and far reaching proposals – which recognised the effective self-regulation which already exists in our sector.
- Ongoing monitoring of reputational risks through press, complaints, and other means and working with members to maintain a positive reputation across the sector.



## Sector-specific legislation

- Extensive engagement around event fees, planning, care regulation, tenure and funding.
- Widened our coalition of support for legislation to key decision makers in all parties.
- Secured support from councils for specific treatment of our sector by Government through the County Councils Network and our shared report.



## Comprehensive and robust data

- Conducted joint research with the County Councils Network to highlight good practice and areas for improvement in coordination between social care departments. This is based on a member survey and a roundtable conducted with CCN and DCN members.
- Collated data on our members' expansion pipeline and developed data on the health, social care, housing and economic benefits likely to follow such an expansion.
- Worked closely with several organisations producing data on the sector to improve the definitions they use and the data they produce.



## A highly trained workforce

- Advised on, participated in, and promoted the Adult Social Care Recruitment campaign, encouraging a focus on the Retirement Community sector wherever possible.
- Worked with other trade associations on the future supply of labour, and on Brexit contingencies.
- Provided CPD accredited training to members through sector specific events and training sessions.



## Enhanced health and wellbeing

- Partnered with the Gold Standards Framework on their Retirement Village Training Programme for end of life care.
- Worked with Sir Muir Gray and UK Active on reimagining aging and strategies to increase physical activity in Retirement Community residents.
- Engaged heavily around planning for the future of social care provision in the UK, positioning Retirement Communities as a key and growing form of provision.
- Liaised with key healthcare organisations to determine how we can partner more effectively and provide members with data, training, and good practice on key health issues.
- Worked closely with CQC on the frameworks they use to assess our sector.
- Played a key delivery and advocacy role for social care through the Care Provider Alliance.





## Progress

As we entered into the 2020s we have been working at turning ARCO's strategic vision into an achievable and demonstrable reality. At the request of our board we have increased our focus on those areas where only ARCO is operating and can add value (e.g. sector specific legislation, effective self-regulation and a clear customer proposition). Our members and partners have generously provided additional resource for this activity. Despite having to redirect much of our efforts this year towards emergency coronavirus activity, we have still seen a fantastic level of activity generated towards our goals.



### Sustainable funding streams

- Working with MHCLG to enact the Law Commission's event fee recommendations.
- Developed economic modelling on the impact of the sector and its growth.
- Made the case for additional capital investment in affordable extra care provision.
- Working with Trowers & Hamblins on a proposal for a stamp duty exemption on buy-back.



### Clarity in the planning system

- The House of Lords Select Committee on Intergenerational Fairness recommended that Retirement Communities should fall within the C2 use class, and that the Government should issue planning guidance to recommend that local plans consider the needs of older people including specific policies to address this (following written and oral evidence submitted by ARCO).
- Secured ministerial guidance for older people's housing after writing to secretaries of state, ministers and civil servants on the subject and raising the issue of the delay directly with the Minister of State in a meeting. This guidance effectively differentiated us from care homes and retirement flats but does not go far enough on requiring action from local councils and inadequately measures demand for our sector.
- We are working on a joint guidance note with the RTPI to go out to their members calling for councils to take more action to meet the growing need for housing-with-care. We also ran a panel session and stall at their conference, speaking to hundreds of planners.
- Working on a report with CCN and DCN on good and bad planning practice.



### Intelligent use of technology

- Engaged with Innovation Funding and potential partners for a shared bid.
- Ongoing engagement with Bristol Robotics Lab (and others) to build partnerships with members and sense check developments based on real-life need.
- Explored smart building technology to determine best practice in future proofing new build Retirement Communities.
- Engaged with CQC about how their frameworks will need to adapt over time to take into account things like automated and robotic prompting.
- Exploration of modern methods of construction including modular as a potentially key method for delivering at scale.



### Flexible models of tenure

- Secured a positive report from the HCLG Select Committee investigation into leasehold reform accepting our case for an exemption from the ban on leasehold houses.
- Responded to three extensive Law Commission consultations and engaged extensively in stakeholder events.
- Conducted research on models in other jurisdictions.
- Preliminary scoping session with legal experts on what alternative forms of tenure might work in the UK.

# Breadth...

We have clearly identified overarching outcomes needed to deliver on each of our ten priorities, and focused on making progress on many of the deliverables for each. This includes the highlights (some of which are described further in other sections of the Annual Review).



# ...and depth

**While continuing to engage and partner with other organisations on all ten priorities, the Board directed ARCO to focus primarily on these three priorities:**

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**A clear customer proposition**

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**Effective self-regulation**

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**Sector-specific legislation**

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One of the greatest challenges our sector has faced in the past is raising awareness amongst key decision makers and the wider population about what Retirement Communities are, how they are different, and why they are set to become so important in the future.

That's why it has been such a priority for us to raise our sector's profile, to make sure that our messages are being heard, and to explore different ways of getting that message across. This has been a key focus for Gareth Lyon and Sam Dalton this year.

This year has seen a massive increase in the media coverage ARCO have generated for our sector – including in national newspapers and on TV and radio.

We have also made it far easier to find out about Retirement Communities by improving our website and social media presence and by producing more high quality materials to provide to Government, members, partners, stakeholders, and the public.

This year represents a significant step forward, and one we know we'll need to continue to make further progress on, to help us meet our Vision 2030.



# Media Coverage

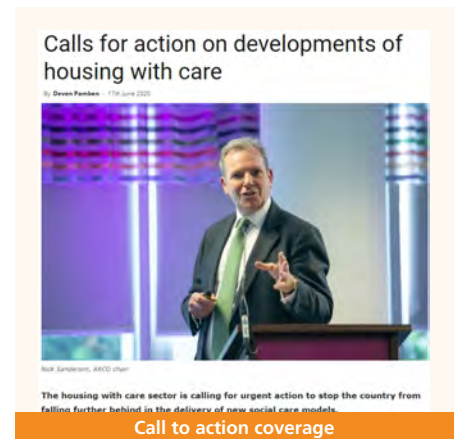
Our strategy of using our thought leadership reports to generate media coverage, as well as providing rapid and insightful responses to relevant political developments has helped to position us as a respected and sought out media commentator. We are now increasingly being contacted by national media and the specialist press for comment. This provides us with greater opportunities to make the case for our sector and to inform discussions about the Retirement Community model.



BBC News



Care Markets



Call to action coverage



Times letter



Inside Housing CCN coverage



Theresa May visit coverage



Guardian letter



Guardian coverage of Mayhew report



Guardian letter on generation



CCN coverage



HomeCare coverage



Helen Whately praises retirement communities

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**This year we have achieved higher profile than ever before for our sector, having secured over 400 pieces of media and press coverage. Highlights this year include:**

- The Times
- CityAM
- 3 articles in The Daily Mail
- The Daily Express
- 9 articles in The Daily Telegraph
- 8 articles in The Guardian
- BBC Look East (6 showings)
- Several syndicated articles on MSN and Yahoo News
- Talk Radio

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**We have also seen a large volume of coverage and columns written by ARCO in 'Housing and Property' publications such as:**

- 24 Housing
- Retiremove
- Better Retirement Housing
- Inside Housing
- showhouse.co.uk
- Residential People
- Scottish Housing News
- Housing Today
- Property Week
- Abode2
- Property Industry Eye
- Estate Agent Today
- Mortgage Introducer
- Mortgage Strategy
- Mortgage Solutions
- Today's Wills and Probate
- Northern Housing Magazine
- London Loves Property
- Property Reporter

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**Health and Social Care publications such as:**

- Care Home Professional
- CareInfo
- Caring Times
- Care Management Matters
- carehome.co.uk
- 1stophealthcare
- DrivenbyHealth
- Home Care insight
- Care Industry News
- The Carer
- Social Care Today
- Care Home Environment
- Care Appointments
- Independent Living

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**Business publications such as:**

- Care Markets
- Health Investor
- LaingBuissonNews
- Business Daily
- Healthcare Business
- BDOonline
- Business Up North

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**Planning and construction publications such as:**

- The Planner
- Professional Housebuilder
- Property Developer
- Local Authority Building and Maintenance
- Construction Update
- Construction Today
- Construction News
- PBC News

- Scottish Construction Now
- Housebuilder
- Leicestershire Building Magazine
- Planning Resource
- Property Wire
- Planning Portal
- Professional Builders Merchant

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**As well as in:**

- Hansard
- Government Business
- CapX
- Knight Frank's Retirement Living Guide
- WiredGov
- MP's blogs and websites
- The Lady
- Several online radio stations and TV stations
- ilc.co.uk
- cass.ac.uk
- The Kings Fund website and newsletter
- The Local Government Chronicle
- LGC Plus
- LocalGov
- Hub Publishing
- New Start
- EGI
- Radius Data Exchange
- Thiis.co.uk
- React News
- The Savills website

## Numerous regional and local publications

### Our website

Our website has continued to develop, offering great support to members during the Covid-19 crisis and featuring more and more strong content in our resources and press section as well as in our standards pages. We are continuing to see more visitors and more click throughs from our social media and bulletins.

### Social Media

This year we have successfully increased the volume and quality of our social media presence. On Twitter we have expanded our following by over 80% and achieved fantastic reach during our conference. On LinkedIn we have tripled our following and consistently see good reach with our steady stream of high quality content including posts on our reports and events, our popular "Decade ahead" series and links to our Covid-19 advice for the sector.

### Our newsletters

Our member, partner and policy bulletins continue to grow in popularity and readership as people seek to learn more about the sector and to engage more extensively. These provide an excellent benefit to members and partners in providing all the latest news and developments about the sector to them in one place as well as updates on ARCO's own extensive work programme.

# Policy

This year has seen ARCO's reach and influence continue to grow in reach and impact. We have developed thought leadership reports, run panel events and undertaken an extensive outreach programme, particularly during the election and since. Interest in this sector keeps ramping up and ARCO has taken every opportunity to increase the breadth and depth of our impact.

We have built a cohort of Vision 2030 Supporters in Parliament and amongst senior business and charitable leaders. We have held a major Parliamentary event which helped to put our sector on the map. We have secured dozens of Parliamentary Questions relating to our sector, appeared before select committees, and got the Housing and Care Ministers to appear at our conference. All the while, we have also been working hard behind the scenes, responding to dozens of consultations and reviews, informing civil service and regulator thinking, and meeting over 40 senior political figures and thought leaders. On top of the research which we have published thus far, we also have a pipeline of further research, thought leadership, and events ready to go in the twelve months ahead.

## Public affairs outreach

We stepped up our political engagement with the three main political parties ahead of and during last year's election – and managed to maintain the momentum throughout the year despite an increasingly challenging environment for meetings during the coronavirus crisis.

At first this took the form both of writing to and meeting key frontline politicians in each party and of engaging with their policy teams, including attending all three party conferences. This then progressed into a massive outreach programme targeting MPs and candidates during the election and afterwards and supporting members to do so. In all cases we sought to secure more explicit statements of support for our sector and the role it can play in housing and social care. After the election we followed up these contacts before increasingly focussing on new Ministers, select committee members and Parliamentarians showing an interest in our sector as 2020 progressed.



Stephen Timms MP visit



CCN Report launch



Lilian Greenwood MP visit

## Our election pledge

During the election we wrote to all MPs and candidates who had a Retirement Community in their constituency and secured over 80 statements of support for the following pledge:

The United Kingdom must set itself the ambition to be a global leader in innovative solutions that address the housing and care needs of our ageing population. This should include:

- An ambition to provide an additional 175,000 older people with access to next generation Retirement Communities by 2030.
- Establishing a cross Government task force to review the regulatory obstacles preventing innovation and growth in this sector.
- A commitment to empowering and protecting older people in their choices and decisions concerning their housing and care, including clarity over any fees and charges they may face – and over what they can expect from their provider.

***We are committed to working with older people, consumer champions and the Retirement Community sector to achieve these goals.***

We also arranged over 50 site visits for candidates and believe that members achieved a similar number of visits.

Since the election we have continued to secure a high number of productive meetings with Members of Parliament of all parties, many of who have asked Parliamentary Questions or signed our Early Day Motion (EDM) in response and who continue to engage positively with the sector.

## EDM 605 states as follows:

That this House recognises the important role which housing-with-care settings such as extra care and retirement villages play in the social care system and the particular contribution those settings have made to protecting the health and well-being of their residents during the coronavirus crisis and towards reducing strain on the NHS and care homes; notes the need for a significant expansion of housing-with-care provision for older people; and further notes how such an expansion would help the UK better manage future similar health crises; and calls on the Government to promote measures which will ensure the expansion of that sector.



Jack Rankin visit

## New Vision 2030 Supporters

This year a few of our Vision 2030 Supporters lost their seats in the General Election or chose to stand down. Others have taken on Ministerial or Shadow Ministerial roles so have had to row-back their involvement or cease to be official supporters. Nevertheless, thanks to substantial growth in year we now have 29 supporters as follows:

- **Baroness Greengross** (Cross Bencher)
- **Lord Shipley** (LD)
- **Lord Foulkes of Cumnock** (Labour)
- **Baroness Gardner of Parkes** (Conservative)
- **Lord Tebbit** (Conservative)
- **Damian Green** MP (Conservative)
- **Lillian Greenwood** MP (Labour)
- **Derek Thomas** MP (Conservative)
- **Dr Lisa Cameron** MP (SNP)
- **Jim Shannon** MP (DUP)
- **Rosie Cooper** MP (Labour)
- **Andrew Mitchell** MP (Conservative)
- **Peter Kyle** MP (Labour)
- **Giles Watling** MP (Conservative)
- **Ian Byrne** MP (Labour)
- **Bob Blackman** MP (Conservative)
- **Alex Sobel** MP (Labour)
- **Leo Docherty** MP (Conservative)
- **Cllr David Williams** (CCN)
- **Mick Laverty** (Extra Care Charitable Trust)
- **Chandra McGowan** (Whiteley Care Village)
- **David Hynam** (Bupa)
- **Jane Ashcroft** (Anchor Hanover)
- **David Williams** (St Monica's Trust)
- **Steve Allan** (Friends of the Elderly)
- **Nick Sanderson** (Audley)
- **Bruce Moore** (Housing21)
- **Phil Bayliss** (Legal & General)
- **Jeremy Porteous** (HLIN)



Bridget Phillipson MP visit

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## The Housing with Care Growth Action Plan and Taskforce

In response to the coronavirus crisis and the consequent desire from policymakers for more immediate solutions on social care, housing and the economy we have refocussed our public affairs and policy campaigning around a series of asks which do not require primary legislation but which could support the sector and aid its continued growth over the coming decade.

This was in response to Ministry of Housing, Communities and Local Government's officials asking for suggestions that were no/low cost and did not require primary legislation. We have developed provisions relating to all our key policy priorities (planning, tenure, the Law Commission's recommendations etc) as well as setting up the cross-departmental taskforce for which we were previously advocating.

We have written to all key Ministers, officials and special advisors to make the case for our programme which we are terming the Housing with care Growth Action Plan (HGAP). We are also pursuing wider Parliamentary and media avenues to increase the political pressure for the reforms being adopted.

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## Launch of research reports and policy events

On 3 June, alongside Cass Business School and the Centre for the Study of Financial Innovation we launched *Too Little, Too Late?* An in-depth analysis on the extent of the under provision of good options for older people's housing in the UK. The report includes several useful recommendations which support ARCO's public affairs asks.

The report received extensive media coverage in *The Telegraph*, *The Guardian*, *The Express*, *City AM*, *Talk Radio* and a huge number of specialist trade titles in health, social care, housing, construction and investment. We launched it at a panel session featuring the report author, Professor Les Mayhew, The Rt Hon Damian Green MP, Jane Ashcroft CBE and Kevin Beirne. We also received a great number of supportive comments and questions from stakeholders which we featured in the report launch including from Parliamentarians, Age UK, the British Property Federation and other organisations in the housing and care sectors. Member PR and social media teams collaborated extensively with ARCO on the launch and we received a huge level of social media interest. We are now using the report as

a helpful proof point in our public affairs activity and questions were asked in Parliament off the back of the report.

On 30 June we launched our *Planning for Retirement* report with the County Councils Network through a panel featuring Peter Aldous MP, Chairman of the All Party Parliamentary Group (APPG) on Counties, Cllr David Williams, Chairman of County Councils Network, Nick Sanderson and Philip Collins, the *Times* journalist, and Julie Ogley, the Director of Housing and Social Care at Central Bedfordshire Council.

In addition to attracting a large volume of attendees from key stakeholders in local government to the launch we also saw significant media and social media interest and are making great use of the report in our engagement with policy makers.

These reports and several others we have planned for the coming months represent a key strand of our policy and communications activity, both developing the arguments and evidence base we can use with policy makers and providing opportunities for profile for the sector and to increase understanding of what Retirement Communities are and the key role they can play.

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## The changing landscape of leasehold regulation and legislation

The leasehold system continues to evolve, and is likely to present challenges to ARCO members' contractual terms and business models. This year we have engaged heavily with the Law Commission, MHCLG and the CMA as well as interested Parliamentarians making the case for a bespoke approach to our sector.

The Government has continued to indicate that it will continue its programme of leasehold reform, with a Leasehold Reform Bill banning ground rents and leasehold houses likely to surface in the next session of Parliament. Our view is that although our members do well to make the leasehold system work for residents there is certainly scope for a new model of tenure which has the potential to be more adaptable and to by-pass many of the issues with leasehold encountered elsewhere.

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## ROPA

In July 2019, the Regulation of Property Working Group published its recommendation on the Regulator of Property Agents (ROPA). The commission, chaired by Lord Best and



Mayhew Report



Vicky Ford MP visit



sponsored by the Ministry of Housing, Community and Local Government, developed wide ranging recommendations for the wider property agents sector (both for leasehold managing agents and lettings agents, as well as estate agents).

We have engaged with the working group and MHCLG throughout, making it clear that we welcome greater accountability and transparency. For Retirement Communities, because of the operational model our members use we believe this accountability is best delivered through sector specific regulation, which we continue to campaign for as part of our wider public affairs work.

## Event Fees

We continue to meet the MHCLG team charged with putting the Law Commission’s recommendations on event fees into effect to ensure that the final proposals are workable and effective in ensuring clarity and transparency for prospective residents.

## Fire risk

ARCO has responded to MHCLG’s Building a Safer Future consultation which includes new proposals for the assessment of fire safety and measures to mitigate fire risks.

Concerningly, MHCLG’s proposals overstated both the risk of fires occurring in Retirement Communities by putting them on a par with specialist accommodation for the homeless and overstated the vulnerability of residents within Retirement Communities.

We have made strong representations on the specific circumstances of Retirement Communities and called for the sector to be treated appropriately. We remain in contact with officials pending future developments.

## Consultations

Alongside all of the above we have continued to represent member interests at every opportunity in response to consultations and inquiries – with over 30 responses in the past year on issues ranging from intergenerational living to fire safety, from regulation of property agents to the role of science and technology in care provision.

## New policy briefing

We have launched a new Policy and Operations Insights briefing which includes much more detailed information on our policy work, external policy developments and updates relevant to operations teams. This has allowed us to refocus our other briefing to more top level industry wide news and events.

## New Policy & External Affairs Executive - Sam Dalton

In the context of all of the above activity we were glad to have a new addition to our Policy team, with Sam Dalton having started in late November.



Theresa May visit coverage

House of Commons

### Role of housing-with-care settings

EDM #605

Slideshow

Tabled 15 June 2020  
2019-21 Session

That this House recognises the important role which housing-with-care settings such as extra care and retirement villages play in the social care system and the particular contribution those settings have made to protecting the health and well-being of their residents during the coronavirus crisis and towards reducing strain on the NHS and care homes; notes the need for a significant expansion of housing-with-care provision for older people; and further notes how such an expansion would help the UK better manage future similar health crises; and calls on the Government to promote measures which will ensure the expansion of that sector.

Early Day Motion

Mayhew report launch



James Brokenshire MP visit



John Penrose MP visit

# Supporting the sector in the covid crisis

The response to Covid-19 fundamentally changed the economic and policy environment ARCO and our members operates in, with Government priorities having shifted dramatically. Accordingly, ARCO responded rapidly to put in place a support package for our members, consisting of information, advice, sharing of good practice and public affairs and media advocacy.

Thanks to the willingness of members to share information and collateral we were able to adopt a collegiate approach to the crisis. ARCO was also well positioned as a member of the Care Providers Alliance and through its existing political alliances to advocate effectively on members' behalf from the start.



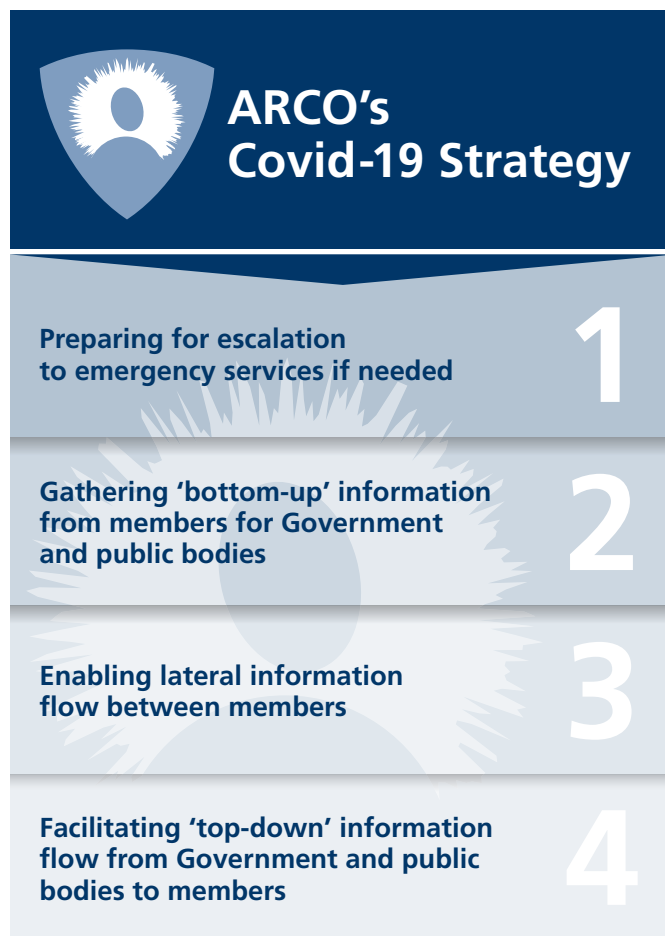
During the coronavirus crisis we developed a dedicated page on the ARCO website which was frequently updated and integrated with our social media including to and summaries of all the latest known guidance for our sector: <https://www.arcouk.org/guidance-and-information-for-covid-19>

We also held regular member meetings with operations leads to cascade new information and developed a dedicated briefing for this purpose.

We met regularly with the Department of Health, the Association of Directors of Adult Social Services and CQC including relevant Ministers.

From the start of the crisis we made the case for our sector to be prioritised and given its fair share of administrative attention as well as PPE, testing and emergency funding. One of the conclusions which was apparent from this is that the Government still struggles to clearly identify our sector and to target measures at us. This remains a priority for our public affairs work.

We have now convened a working group of ARCO members to monitor the ongoing risk of a second wave of Covid-19 and other broader operational risks.



To ARCO's best knowledge, gathered from information volunteered by Members, the numbers of infections and fatalities have remained small with no evidence of intra-community transmission. We believe that early, proactive, engaging and collegiate action from the majority of ARCO Approved Operators has safeguarded residents and communities.

Overall the robust response of the sector to date can be seen as a strong vindication both of the Retirement Community model and of the operational excellence of our members.

# Sector Leading Events

Our 2019-20 Events Programme got off to a great start, but the arrival of the Covid-19 pandemic in February saw the ARCO events team challenged to transform the planned live programme to a new digital format. This resulted in the highest engagement across a full event season in ARCO's history, amounting to over 2000 attendees from across the ARCO Network and wider Retirement Community sector.

## Highlights from the 2019-20 programme

Prior to the lockdown in March, ARCO had already delivered 13 Member and Partner events which saw the Network get out and about visiting Member communities across the UK, networking with Partners in London and also the addition of new Fire Safety and Planning Roundtable events.

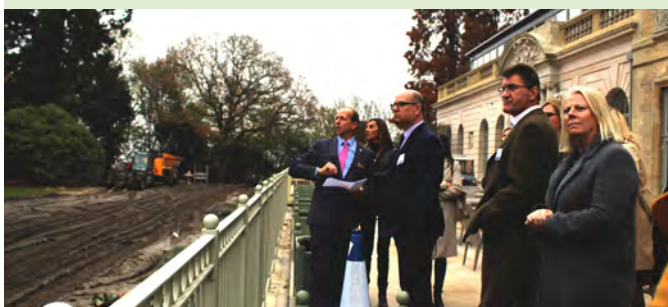
St George's Park Retirement Village in Burgess Hill, Surrey hosted the first Operational Management Workshop of the year. The session focused on fire safety in Retirement Villages and set wheels in motion for forming the Fire Safety Working Group for collaborative working across our Members. We were also treated to a tour of the beautiful St George's community by Philip Smith and his team, including the Resident allotments which were a true highlight.



We held two ARCO Network Briefings in September and December where Members, Partners and Affiliates came together to network and hear about key sector developments. Held at The City Centre, (complete with cityscape of London!) and at the offices of Badenoch + Clark, attendees enjoyed hearing from special guests speakers, Dr Margaret Wylde, President and CEO of ProMatura Group and Glyn Davies, former MP for Montgomeryshire and Vision 2030 supporter.

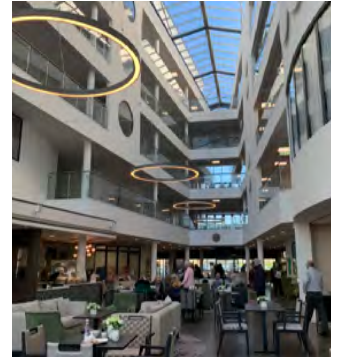


The newly opened Audley Cooper's Hill hosted the first Marketing and Sales Workshop of the year. Attendees were treated to a history and tour of the newly refurbished site from Village Manager, Thomas Garlich and Strategic Partners, Sherpa gave a presentation into customer centred sales and their experience of working with the US market.



The Technology and Development Workshop took place this year in Inspired Village's Gifford Lea in Cheshire. Attendees enjoyed presentations from Wendy Griffin and Andy Birch from Strategic Partner, nicol thomas and heard about the latest technical innovations from Glide and Hoare Lea.





Professor Keri Thomas OBE spoke about her work with The National Gold Standards Framework and providing the best possible end of life care. The second Operational Management workshop of the year was held at the newly opened ExtraCare Charitable Trust's Wixams Village in Bedford.

**ARCO would like to thank all of the Member communities and Partners who have kindly hosted or supported events this year.**

**Outside of the ARCO events programme, Michael Voges has spoken at a number of external events and webinars including the Longevity Leaders Virtual Experience, Property Week's Retirement Living 2019 Conference, Laing Buisson's Housing with Care Seminar and for the UKHCA's Webinar: Future of Homecare – Covid-19 and beyond.**



# Our Key Conference Goes Digital

The What Next? 2020 Annual Conference was due to take place in person on 1st July in London. However due to lockdown and the sector fully in place across the UK, and the sector focusing wholly on managing the pandemic and keeping residents safe, ARCO took the decision to cancel the conference and launch instead our What Now? 2020 Digital Season.

ARCO's Digital Season

## what now ? 2020



### Season Stats

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**12** webinars held during the season

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Over **1700** attendees joining online from across the UK

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**2** research reports launched, and **2** ARCO guides published

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Over **40** expert speakers contributing from across the sector and beyond

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## Highlights



The season spanned from the end of May through to mid-July with a programme that focused on what the new priorities were for the sector. What Now? 2020 held on the 28 May kicked off the season by addressing key questions of where the Retirement Community sector might be heading post-Covid 19.

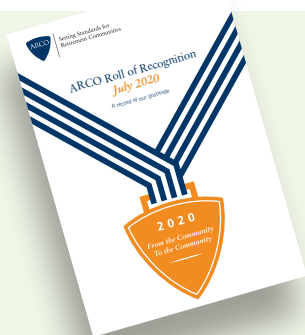
How had customer perception of our sector changed? How would operators respond to the challenging economic times ahead? And how were investors weighing up investment in housing and support infrastructure?

Jane Ashcroft CBE (CEO, Anchor Hanover), Will Bax (CEO, Retirement Villages), Honor Barratt (Managing Director, Birchgrove), Phil Bayliss (CEO of Later Living, Legal & General) and Phil Schmidt, Senior Director of webinar supporters CBRE, joined Michael Voges to discuss this next challenging chapter, reflecting on the previous four months and how the Retirement Community model had enabled operators to keep residents safe and connected.

**Leasehold & Beyond: the Future of Tenure & Regulation in Housing-with-Care** focused on the future of tenure and regulation, asking what customers wanted from housing-with-care; whether the current legal arrangements deliver this; how other countries are using better models of tenure to provide this and what legal changes would be needed to bring this about in the UK. Richard Davis, CEO of Arena Living, and former Chair of ARCO joined the discussion from New Zealand to give the perspective of how the tenure models work for customers there.

As part of the webinar, ARCO also launched the new guide on event fees: **Event fees in Housing-with-Care: What now?** Legal experts from leading law firms Trowers & Hamlins, CMS, Eversheds International, Gowling WLG and Pinsent Masons joined Knight Frank and ARCO's Sally Ireland to discuss the role of event fees in the housing-with-care sector, and the likely next steps in regulation including the Law Commission's proposals.

Working in collaboration, ARCO and the County Councils Network (CCN) launched the **'Planning for Retirement' Report** at a live webinar in June chaired by The Times Columnist, Philip Collins. The webinar brought together key sector figures Cllr David Williams (Chair of CCN), Nick Sanderson (Chair of ARCO), Julie Ogley (Director of Social Care, Health and Housing at Central Bedfordshire Council) and Peter Aldous MP (Chair of the APPG) to discuss the report findings and how Retirement Communities can meet the needs of the UK's aging population.



The final webinar in the season in July brought together Member staff, colleagues and sector stakeholders to recognise the enormous and dedicated contribution each person had made to the sector in what had been the most difficult six months in our recent history. The **Roll of Recognition** saw over 300 sector workers across the ARCO membership nominated by residents and colleagues for their hard work and care. Nominated Village Managers Emma Earle (ExtraCare Lark Hill), Paul Ray-Gain (St George's Park) and Sally Griffiths (Inspired Villages Millbrook) joined the webinar to reflect on their experiences, what being nominated meant to them and we also welcomed the return of Sir Muir Gray from The Centre of Optimal Ageing as a guest speaker.

ARCO would like to thank all speakers and partners who supported the Digital Season

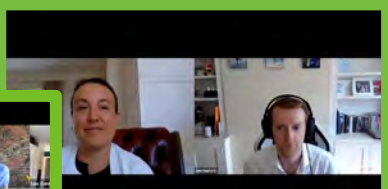
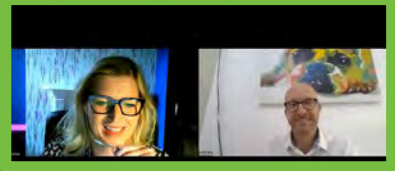
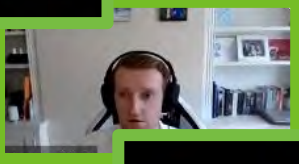
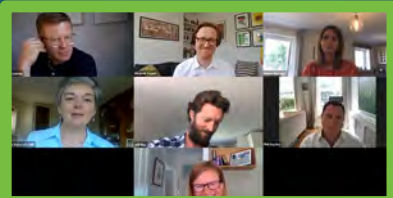


We were delighted to see strong attendances across all of our digital season events, in many cases attracting multiple times the attendance we would have seen at in person events.





By providing our content online we were able to reach people across the UK and have been able to continue to make this content available after the events, on our website, on those of our partners and on YouTube.



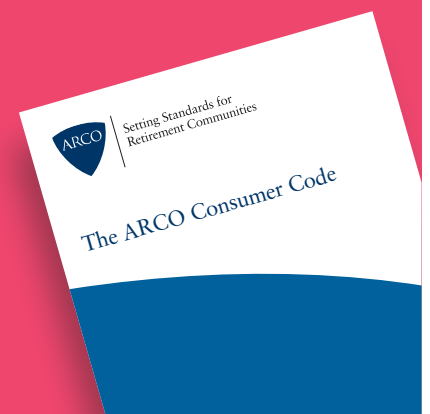
# Robust Standards

Responding to the needs of our members, their residents, and consumers in the Covid-19 pandemic.



ARCO's Consumer Code is binding on all members, and the provisions laid out in the Code go above and beyond statutory requirements. Members are required to self-audit their processes to ensure compliance, and an annual programme requires all members to be assessed by external assessors to measure their compliance with the Code. The external assessments include site visits; checking marketing, legal, and procedural documents and websites; engaging corporate and local staff in dialogue; and ensuring a fair and consultative relationship is maintained with residents.

The assessment process aims to be objective, thorough, and evidence-based. Achieving compliance on a first assessment remains a requirement for all new ARCO members – whether they are already operating Retirement Communities or are just beginning on their journey to becoming operators.



**It has been a very unusual year for ARCO's Standards and Compliance programme. The Covid-19 pandemic has meant that our focus has necessarily been on supporting our members to keep their residents and staff safe and maintaining best practice in infection control and care. During lockdown, we were unable to carry out new assessments of our members and so – in addition to supporting them in responding to the pandemic – as lockdown started to ease we assisted members in returning to the "new normal" and commencing marketing, sales and rental activities again.**

**This included producing practice notes on online and distance marketing, sales and lettings; and on the use of home purchase and part exchange companies; sharing best practice guidance and policies in relation to Covid-19 secure moves into retirement communities; and assisting members individually with standards and compliance queries.**

**As lockdown measures have started to ease, we hope to return to a full programme of assessment from September 2020, incorporating social distancing measures and remote assessment for safety. We assessed our standards programme in the Standards Review of 2018-19 to identify areas for further development. As a result of this, we have developed a new Enabling Compliance review for operators new to ARCO and/or the sector, to provide more intensive and tailored compliance support for this group of members. We have also prioritised ARCO Consumer Code requirements in our assessments, to make clearer which areas are essential to achieve compliance and which are matters of best practice.**

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## **Good practice**

Despite the difficult and uncertain circumstances during the Covid-19 pandemic, ARCO members have risen to the challenge. With lockdown measures in place, members were able to adapt to unprecedented disruption and find new ways to conduct marketing and sales online, digitally, and remotely. When faced with a rapidly shifting environment of incoming regulations and guidelines, they were quick to work together and demonstrate collaborate spirit at a time when residents were particularly reliant on operators for support. Above all, they have shown that the high standards that ARCO stands for are a solid foundation from which our sector can continue to navigate uncharted territory.

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## **Areas where further work is needed**

### **Complaints**

The ARCO Consumer Code requires ARCO members to welcome feedback and treat it seriously, and to have a clear written procedure for handling and resolving complaints, providing a final decision within 56 days unless a later deadline is agreed with the complainant. All ARCO members are signed up to an Ombudsman scheme and must advise complainants that they can refer the complaint to the Ombudsman if they are unhappy with the response that they have received.

ARCO also receives a small number of complaints directly from residents. We have published our complaints policy on our website, making clear that we cannot provide an investigative function or redress for complainants. However, we do where

appropriate raise the issue with the member to encourage resolution, and we take any complaints received into account in our standards and assessment programme.

### **Monitoring compliance with the Code**

ARCO's Standards Committee, which reports to its Board of Directors, oversees our work in relation to standards and compliance.

Nick Abbey is ARCO's Standards Committee Chair. Nick has been involved with housing and care for older people for more than 40 years, and was reappointed as Independent Chair of the Standards Committee for ARCO's 2019/20 financial year. Nick's term as Chair will finish in October 2020 and we thank him for his wise counsel and adept chairing of the committee throughout his period of office.

The Standards Committee for 2019/2020 also included: Jamie Bunce (CEO of Inspired Retirement Villages), Angela Harding (Executive Director, Operations at the ExtraCare Charitable Trust), Peter Martin (Development and Commercial Manager of Enterprise Retirement Living), Jeremy Walford (Executive Chair and Founder Trustee of Middleton Hall) and new member Martin D'Mello (Group Director of Health Care and Support at One Housing). Our thanks to all of them for their enthusiasm and diligence in challenging times.

ARCO has this year recruited a new team in Standards and Compliance. Sally Ireland has joined us as Head of Regulation and Compliance – Sally is a barrister with a background in public law, social care law and legislative drafting. John Hesford has joined ARCO as Compliance and Engagement Manager: John has considerable experience in leading compliance and member support functions including at the British Chamber of Commerce.

ARCO continues to commission specialist assessment and compliance consultants to undertake our independent assessments and provide additional compliance support to members, as well as consultancy services to ARCO in developing our standards and compliance framework. This work has again been carried out in 2019/2020 through The Consultant Connection Ltd (TCC) with Dr Alan Woods as lead assessor, supported by Peter Smith and Ian Castle.

**Looking forward** In 2020/2021 ARCO will continue to assist members to achieve high standards of transparency and compliance and to welcome new members and operators to the sector.

# Strong and Effective Governance

ARCO is governed by a Board of Directors, led by a Chair and Vice-Chair. In October 2019 ARCO's Directors once again voted unanimously to appoint Nick Sanderson (Chief Executive of Audley Group) as Chair, and Jane Ashcroft CBE (Chief Executive of Anchor Hanover) as Vice-Chair.

ARCO's Board delegates some of its day to day functions to a Steering Group. We also have a Standards Committee which oversees ARCO's Standards and Compliance programme, including the ARCO Consumer Code. The Board retains overall decision-making responsibility for membership, budget planning and key standards concerns.

ARCO's Executive Team have a strong relationship with the Board, and the Board's input is crucial in shaping our ongoing work.

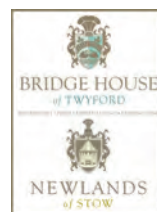
## Board Members

Our Board is made up of all full ARCO members that have not taken up the small member discount. As such our Board consists of representatives from our Corporate Directors.

In 2019/20 these were:



St Monica Trust



Birchgrove

RANGEFORD VILLAGES



One Housing



## CHAIR



**Nick Sanderson**  
Chair

**Nick Sanderson was unanimously elected as ARCO's new Chair in October 2017.**

Nick Sanderson is founder and CEO of Audley Group, the UK's largest developer and operator of luxury retirement villages. In the early nineties he created Audley to develop a portfolio of private retirement villages. The first two award winning schemes were in Tunbridge Wells and Harrogate.

In 2008 he formed a partnership with Moorfield Group.

Audley now has 20 schemes in its programme with nearly 1800 units. The company has over 2000 customers and over 650 staff. In the Spring of 2016, Audley launched Mayfield Villages to provide the Audley offer at a more affordable price, the first village is being developed in Watford.

Nick is a regular speaker at national and international conferences and a contributor to several publications. He has acted as an advisor to public and private sector organisations.

## VICE-CHAIR



**Jane Ashcroft CBE**  
Vice-Chair

**Jane was unanimously elected as ARCO's Vice-Chair in June 2015.**

Jane joined Anchor (now Anchor Hanover) in 1999 from B4\*a, which had acquired Care First plc where she was Personnel Director. She was appointed Chief Executive of Anchor on 9 March 2010. Prior to joining Care First, she held HR and governance roles with Bromford Housing Group and Midlands Electricity plc. Jane is a Trustee of The Silver Line, a helpline for older people and a Non-Executive Director of Dignity plc.

She was a founder of ARCO, representing the growing market for retirement village provision in the UK and is currently Vice-Chair. Jane is also Vice-Chair of the National Housing Federation which represents housing associations in England. Jane is a Fellow of the Institute of Chartered Secretaries and a Member of the Chartered Institute of Personnel and Development. She was awarded a CBE in the 2013 New Year Honours for services to older people.

## Steering Group

ARCO's Steering Group oversees ARCO's day-to-day functions.



**Jane Ashcroft CBE**  
Chief Executive, Anchor Hanover (Vice-Chair)



**Kevin Beirne** Head of Retirement,  
Octopus Real Estate – representing Rangeford



**Bob Bessell**  
Chairman, Retirement Security



**Nick Sanderson**  
CEO, Audley Group (Chair)

## Standards Committee

ARCO's Standards Committee oversees ARCO's Standards and Compliance programme.



**Nick Abbey**  
Chair of ARCO Standards Committee



**Jamie Bunce**  
CEO, Inspired Retirement Villages



**Martin D'Mello**  
Group Director of Health Care & Support,  
One Housing



**Angela Harding**  
Executive Director Operations,  
The ExtraCare Charitable Trust



**Peter Martin**  
Development & Commercial Manager,  
Enterprise Retirement Living



**Jeremy Walford**  
Executive Chair/Founder Trustee, Middleton Hall

## PATRON



**Baroness Sally Greengross OBE**

We are privileged to have Baroness Sally Greengross as our Patron. Baroness Greengross has been a crossbench (independent) member of the House of Lords since 2000.

Baroness Greengross was Director General of Age Concern England from 1987 until 2000. Until 2000, she was joint Chair of the Age Concern Institute of Gerontology at Kings College London, and Secretary General of Eurolink Age. She is an Ambassador for Alzheimer's Society, The Silver Line and HelpAge International.

Her work on ageing has been recognised by the UN Committee on Ageing and she received an outstanding achievement award from the British Society of Gerontology as well a British Geriatric Society Medal. Sally was voted UK Woman of Europe in 1990.

# Strong and Effective Governance

## Executive Team



**Michael Voges**  
Executive Director

As Executive Director, Michael oversees the delivery of ARCO's strategy on a day to day basis. Michael has worked with ARCO since its formation in 2012. He successfully led Cordis Bright's work on providing the ARCO Secretariat until July 2013 and was appointed as ARCO's first Executive Director in August 2013.

Michael was a public sector consultant for 6 years, having previously worked as a journalist. He holds a BA in Social and Political Sciences, and an MSc in Comparative Social Policy.



**Gareth Lyon**  
Head of Policy & Communications

As Head of Policy & Communications, Gareth leads on ARCO's engagement with key decision makers and influencers, developing our thought leadership on behalf of the sector and managing our communications channels. Gareth joined ARCO in May 2018.

Gareth has worked in all aspects of policy and communications for over 13 years in a range of sectors including health, social care, education, science and technology. He has also served as a local councillor for over 10 years with particular experience in planning and community. He has a degree in History and Politics.



**Sally Ireland LLM**  
Head of Regulation & Compliance

Sally Ireland is a barrister and as Head of Regulation and Compliance at ARCO, she oversees ARCO's regulation of Retirement Communities in addition to leading ARCO's work to develop the law to allow for further expansion of the sector.

Sally has practised in public and social care law in addition to working in policy and law reform in relation to regulated settings. Her degrees are in Law and LLM.



**Libby Gordon**  
Head of Memberships

As Interim Head of Memberships Libby leads on strategic outreach and liaison to current and potential members, partners, supporters/advisory council members and affiliates and is working to ensure that ARCO achieves its potential for sustainable growth in the September 2020-August 2021 financial year by retaining and recruiting members. With a background in the charity sector, fundraising, strategic operations and change management, Libby is passionate about making improvements to people's lives and learning more about the ways in which we can make this sector grow to the levels similar to those in her native New Zealand.

## Executive Team



**Tade Muiyiwa-George**  
Relationship Manager

As Relationship Manager, Tade works closely with the Executive team to deliver ARCO's member and partnership programme, building relationships with key stakeholders across the sector.

Tade has an entrepreneurial background with further experience in events and project management developed both at home and abroad.



**Katie Draper**  
Programme and Events Manager

Katie joined ARCO in January 2019 and works to support the Executive team in programming year-round member events and the delivery of ARCO's Annual Conference.

Katie has worked in the charitable event sector for the past 9 years and has delivered high profile events for both the Royal Horticultural Society and Battersea Dogs & Cats Home.



**Ross Godwin**  
Finance and Business Manager

Ross Godwin joined ARCO in October 2019 as Finance and Business Manager, with responsibility for maintaining ARCO's financial and statutory records.

Ross is a highly experienced and qualified finance professional, with over 30 years experience working for a range of organisations, including Marsh & McLennan Companies and Smith & Williamson. He is also a trustee of the Charles Godwin Charitable Trust which helps those in need and in particular the young and elderly.



**Sam Dalton**  
Policy and External Affairs Executive

As Policy and External Affairs Executive, Sam plays a key role in making the case for a stronger Retirement Community sector among politicians, civil servants and other stakeholders, as well as developing ARCO's thought leadership work and media presence.

Sam joined ARCO from social integration charity The Challenge, where he focused on policy and public affairs, and led work on an inquiry into healing generational divides in partnership with the parliamentary group on social integration. He has a BA in Politics, Psychology and Sociology (PPS), and an MA in Social Science.



**Natasha Tomlinson**  
Executive Assistant

Natasha has worked with ARCO since October 2018 and joined us officially in February 2019 as Executive Assistant. Natasha provides executive administration support to the ARCO team ensuring that busy calendars and meeting schedules run smoothly and assisting with events and projects.

Natasha has a wealth of experience in all aspects of executive support, events, and project management.



**John Hesford**  
Compliance Engagement Manager

As Compliance Engagement Manager, John manages ARCO's Standards and Compliance function, as well as supporting ARCO's Head of Regulation and Compliance in developing sector-specific legislation.

John was previously the Business Network Manager at the British Chambers of Commerce, where he was responsible for accreditation, complaints and stakeholder engagement. John has a BA in Politics and International Relations.

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## We would also like to thank former ARCO staff who were on the team for part of the 2019/20 membership year:



**Ellie Pyemont**  
Head of Membership & Operations



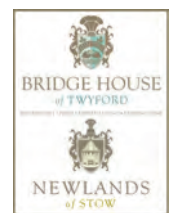
**Keira Daniel**  
Team Assistant

# ARCO Approved Operators



APPROVED  
OPERATOR

A2 Dominion  
Abbeyfield  
Anchor Hanover  
Audley Group  
BEN  
Berkeley Healthcare  
Birchgrove  
Brio Retirement Living  
Enterprise Retirement Living  
The ExtraCare Charitable Trust  
Inspired Retirement Villages  
Jewish Care  
LifeCare Residences  
MHA  
Middleton Hall  
Notting Hill Genesis  
One Housing  
Rangeford Villages  
Retirement Security  
Retirement Villages  
Richmond Villages  
St George's Park  
St Monica Trust







Birchgrove



The ExtraCare Charitable Trust

JEWISH CARE



MIDDLETON HALL RETIREMENT VILLAGE

One Housing

RANGEFORD VILLAGES



ST GEORGE'S PARK



St Monica Trust

# Prospective & Provisional Members

# ARCO Accelerator Programme

Adlington  
Eden Retirement Living  
Elysian Residences  
Capital Care Villages  
Riverstone Living  
Santhem Residences

Amicala  
C Squared Property Developments  
Caring Homes  
Friends of the Elderly  
Guild Living  
Origin UK  
Radian  
Radian  
Royal Masonic Benevolent Institution  
TLC Care  
Tonic Living CIC



# Strategic Partners

# Supporters

Strategic Partners are non-operators that are leaders in the housing-with-care field.

Badenoch + Clark  
 Castleoak  
 nicol thomas  
 Octopus Real Estate  
 Sherpa CRM  
 Trowers & Hamlins

Carterwood  
 CBRE  
 CMS  
 Eversheds Sutherland  
 Glide  
 Gowling WLG  
 JLL  
 Knight Frank  
 Pinsent Masons  
 Savills  
 Standards Wise International  
 Urban Edge



# ARCO Affiliate Network

Acuity Law  
 Ageing Asia Alliance  
 Aging2.0  
 Arcadis  
 Archadia  
 ASSA ABLOY Global Solutions  
 Assael Architecture  
 Bank Leumi (UK) plc  
 Bernard Interiors  
 Bevan Brittan  
 BNP Paribas Real Estate UK  
 boomer & beyond  
 Cain International  
 calfordseaden  
 Centrus  
 Charterpoint Senior Living  
 Christie & Co  
 Clydesdale & Yorkshire Bank  
 ColladoCollins  
 Colliers International  
 Cushman & Wakefield  
 DAC Beachcroft  
 David Phillips Social Living  
 EAC  
 Eclipse Nursecall Systems  
 Faithful+Gould  
 FNTC  
 Fortwell Capital  
 Gerald Eve  
 Guardian Carers  
 Healthcare Property Consultants

HEWI  
 Hoare Lea  
 Hydrock  
 Ian Willams  
 IBI Group  
 Invisible Creations  
 Irwin Mitchell  
 LaingBuisson  
 Lexington Communications  
 Memory Tracks  
 Motionspot  
 National Property Trade  
 One Fell Swoop  
 Pegasus Group  
 Pollard Thomas Edwards  
 Pozzoni  
 ProMatura Europe  
 PRP  
 Royds Withy King  
 Saunders Boston Architects  
 Saunders Partnership  
 SAY Property Consulting LLP  
 Stride Treglown Ltd  
 Tetlow King  
 The Care Workers' Charity  
 Thrive Architects  
 TLT  
 ukactive  
 Whichelo Design Studio Ltd.  
 Whiteley Consulting Ltd



AGING<sup>2.0</sup>

ARCADIS

ARCHADIA

Assael

ASSA ABLOY  
Global Solutions

Bevan Brittan 

BNP PARIBAS

boomer  
& beyond

Cain  
International

calfordseaden

CHRISTIE & CO

Clydesdale  
Bank  
Yorkshire  
Bank

ColladoCollinsArchitects

Colliers  
INTERNATIONAL

CUSHMAN &  
WAKEFIELD

EAC

ENS  
Freedom Through Technology

FAITHFUL  
GOULD

fntc

FORTWELL  
CAPITAL

hpc  
HEALTHCARE  
PROPERTY  
CONSULTANTS

HEWI

HOARE LEA (H.)

Hydrock

ian williams  
Looking after Buildings

irwinmitchell

LaingBuisson  
Infrastructure Intelligence

LEXINGTON  
COMMUNICATIONS

Memory  
Tracks

MOTION  
SPOT

Pegasus  
Group

Pollard  
Thomas  
Edwards

pozzoni  
architecture

ProMatura  
Europe

PRP

Saunders  
Architecture+  
UrbanDesign

say

STRIDE TREGLOWN

Tetlow King  
PLANNING

the  
care  
workers'  
charity

UK  
active  
More people  
More active  
More often

Whichelo  
DESIGN STUDIO  
RETIREMENT • WELLNESS • LIGHTING

Whiteley Consulting  
NAVIGATING LATER LIVING

# Looking Forward

**This year has demonstrated further the importance of valuing the lives and wellbeing of older people and the great need to re-think how we deliver care.**



# 2021

## Retirement Communities and a new chapter for older people in the UK

**To this end, and with rising political, media, consumer and investor interest it looks like 2021 is set to be a key turning point for our sector.**

ARCO is committed to working to remove the barriers which stand in the way of increasing supply of housing-with-care for older people. We will also be working towards new and clear regulation which will protect the rights of residents and clarify what they can expect of operators, put Retirement Communities on a clear legal footing, and give investors more certainty about coming into our market.

Having seen a significant increase in interest in our sector over the past year from investors, suppliers and policy makers we are now looking to develop new ways and structures which will help to maximise value for them and our members – including our new Advisory Board and planned All Party Parliamentary Group.

After the loss of much of the year in policy terms due to the coronavirus we are now seeing the first waves of an expected tsunami of regulatory changes and consultations including in planning, the passing into law of the recommendations on the Regulation of Property Agents, leasehold reform, and the event fee disclosure requirements first mooted by the Law Commission, and fire safety. We are even optimistic that we will see long overdue movement on the reform of social care.

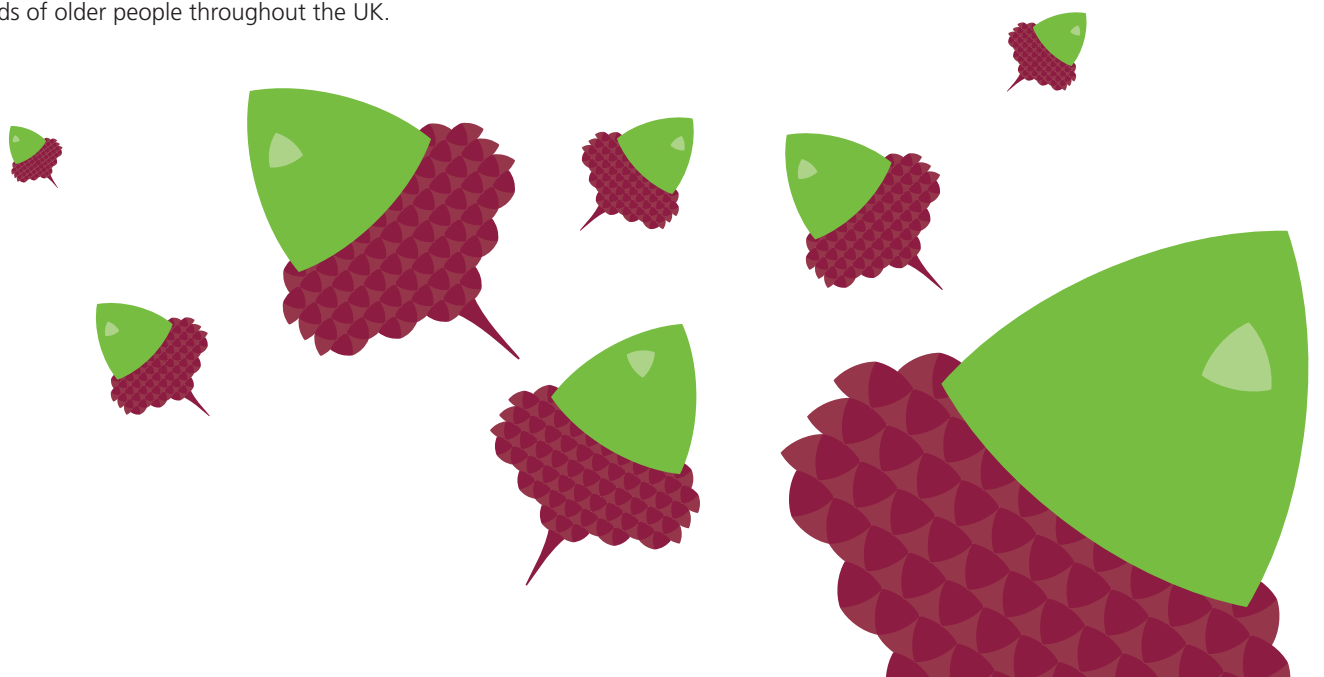
We look forward to welcoming several new members to our sector, particularly in the under-served mid-market. We look forward to this helping to provide better housing and care for thousands of older people throughout the UK.

As the coronavirus hopefully continues to subside we look forward to being able to return to running more of our exciting events programme in person.

Whilst all of this is taking place against the backdrop of a challenging economic picture, and we are therefore taking nothing for granted, we know that the long-term trends continue to run in our favour, that an ageing population will increasingly demand better services, better housing and better care which helps people to stay healthy and independent for longer. If we maintain a relentless focus on delivering for them and improving services and standards then the future of our sector is assured.

As such, as well as our external advocacy for sector-wide regulation, we will continue our own standards review based on what works for our members and their residents.

We have seen some substantial changes to the ARCO team this year and are now looking at what capacity we need to make sure we continue to function as effectively as possible for our members. We are confident that having come through the past twelve months strongly, we have what it takes to deliver well for the sector as a whole in the year ahead – we look forward to working with our members and allies in doing so.



**The Associated Retirement Community Operators (ARCO) is the main body representing the Retirement Community sector in the UK.**

**Associated Retirement  
Community Operators (ARCO)**

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