



Setting Standards for
Retirement Communities

Annual Review 2022

September 2021 to August 2022



A formative year.....	1
Welcome.....	2
Big Six.....	4
Vision 2030.....	6
Making our voice heard.....	8
Influencing and informing decision-making.....	10
Supporting the sector with Covid-19 and social care.....	12
Sector-Leading Events.....	14
The Key Conference for our Sector.....	16
Designing the future of Standards and Compliance.....	18
Strong and Effective Governance.....	20
ARCO Approved Operators, Members, Accelerator Programme, Strategic Partners, Partners.....	24
ARCO Affiliate Network.....	26
Ready for the future: 2022-2023 outlook.....	28

About ARCO

Founded in 2012, ARCO is the main body representing not-for-profit and private operators of Integrated Retirement Communities in the UK. We work in three distinct areas, each vital in supporting our Members and growing the sector that helps people 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

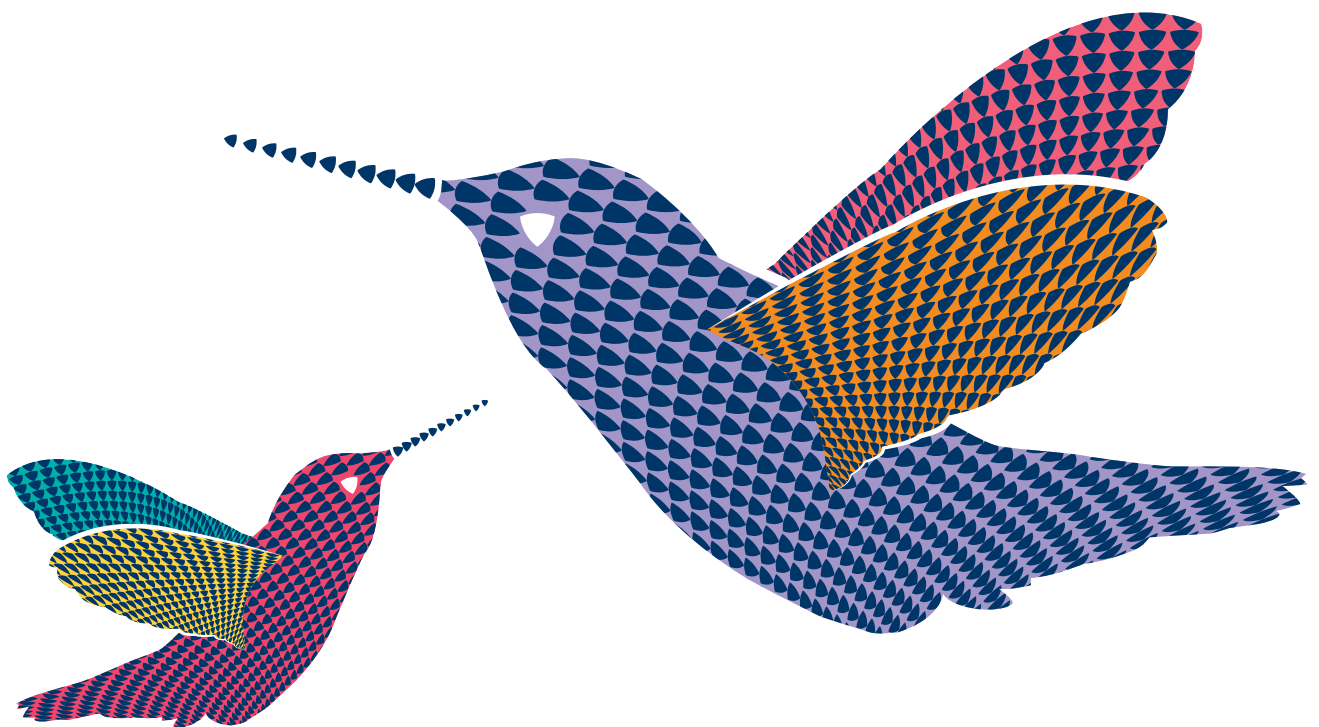
ARCO believes that meaningful, long-lasting partnerships and commitments are at the heart of solving the challenge of meeting the housing, care, and support needs of our ageing population.

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

<p>ARCO are incredibly grateful for the support we received this year from our Strategic Partners:</p>	 <p>Making a real difference</p> <p>Apetito supply meals that are tasty, nutritious and crafted with care by chefs using high-quality ingredients, so that they not only meet dietary needs, but also promote well-being by turning an everyday meal into a stand out dining experience.</p> <p>apetito.co.uk</p>	 <p>With over 1.5 million homes currently covered, NHBC are the UK's leading provider of warranty and insurance for the new homes industry.</p> <p>nhbc.co.uk</p>	<p>nicol thomas</p> <p>Nicol Thomas is an integrated architectural design and project management practice with experience of delivering over 3500 extra care apartments across 18 Retirement Communities.</p> <p>nicolthomas.co.uk</p>	 <p>Working with operators, developers and landowners, Octopus invests in exceptional healthcare facilities you'd choose for your loved ones.</p> <p>octopus-realestate.com</p>
 <p>Sherpa aligns strategic, operational and human objectives to transform sales culture and drive results.</p> <p>sherpacrm.com</p>	 <p>TIS combine innovative technology solutions with sector, regulatory, and technical expertise to protect your people, places and spaces with intelligent, converged life safety, security and communications systems.</p> <p>tis.co.uk</p>	 <p>Trowers & Hamlins is a leading international law firm with a specialist practice in health and social care.</p> <p>trowers.com</p>	 <p>Tunstall's pioneering software, hardware and services enable new delivery models to transform services across the care continuum, empowering people to live independently.</p> <p>tunstall.com</p>	 <p>Established in 1897, and celebrating its 125th anniversary in 2022, the Wates Group is one of the leading privately-owned construction, residential development, and property services businesses in the UK.</p> <p>wates.co.uk</p>

The last 12 months have been defining for our sector. Quite literally in some cases, as we defined what our Members do more closely with the launch of our new 'Integrated Retirement Community' term.



But also in terms of our events programme, which saw us emerge from the pandemic with not one but two ARCO conferences to set out a new vision for our sector. In terms of our legal and standards work, through which proposals for a new Leasehold Plus tenure model have been tabled. And defining on a political level, with the Government committing to the formation of an Older People's Housing Task Force, following over two years of campaigning by ARCO and partners.

The opportunities created by the past year are unprecedented for our sector. And the need for a huge growth in Integrated Retirement Communities is greater than ever. We owe it to older people to work together and make it happen.

The last 12 months have been defining in more ways than one. But the next 12 months can be even more so.

Welcome

There is so much to be positive about when we look back on the last year, and as we enter ARCO's 10th as an organisation. While the challenges of COVID-19 will never disappear, we emerged from the pandemic by hosting great in-person events again, and making tremendous progress in all areas of ARCO's work.





Nick Sanderson
Chair, ARCO



Jane Ashcroft CBE
Vice-Chair, ARCO

After two and half years without an ARCO conference, it was special to be able to hold two within 12 months at the IET in London, occasions which we are sure you will agree were brilliant opportunities to get people back together, discussing the key issues for our sector, and setting out the vision for where we go now. It was great to see so many of you there.

The first of the two conferences, back in November 2021, provided the springboard from which we launched the new term for our sector – ‘Integrated Retirement Community’. Clearer terminology has been something our sector has been crying out for for years now, and the new term was introduced to improve consistency in language, and more closely convey what our sector is all about. We are delighted it received a positive reception and has been widely adopted.

Getting back together to discuss the key issues has been more important than ever. With the focus now on the future of social care and rebuilding in the wake of the pandemic, we have got to ensure our sector is in the best possible place to grow and provide the support more older people desperately need. For their health, wellbeing, social connection, and so much more.

This is particularly so in light of the Government’s announcement of a cross-department Older People’s Housing Task Force, a true milestone for our sector which provides a once-in-a-generation opportunity to reform the key policy barriers holding our sector back, from confusion in the planning system to the lack of consumer protection regulation.

The Task Force follows over two years of hard campaigning by ARCO, intensifying in the past 12 months with new Parliamentary Supporters joining our forces, raising awareness about our

sector in the Houses of Commons and Lords, and calling for change. ARCO’s policy work has continued to make the case for more Integrated Retirement Communities, including the Putting the ‘care’ in Housing-with-Care report which demonstrated our sector’s role in tackling social care challenges.

What the Task Force also shows, though, is just how important and connected all areas of ARCO’s work are. The development of new proposals for a Leasehold Plus model of tenure by the legal and standards team will help show to the Task Force that we need sector-specific solutions. And at this key juncture for our sector, drawing on the support and expertise of ARCO’s widening family of Members and Partners is of critical importance – something ARCO’s membership and partnership team continue to do a great job at.

Looking at what we built towards in the past 12 months, and what we are striving to achieve in the years ahead, it is clear that the impact of Integrated Retirement Communities is not going to be just a drop in the ocean. Indeed, it cannot be. We have got to massively expand supply beyond the meagre 0.6% of over-65s who currently have the opportunity to live in a Housing-with-Care setting. The review conducted by Professor Les Mayhew of the International Longevity Centre – UK into the scale of unmet need for Integrated Retirement Communities will

show just how many tens of thousands of new schemes need to be built each year to get us where we need to be.

Only by expanding the sector to this degree will we have the necessary impact on reducing GP and hospital visits and the need for older people to go into a care home, on tackling the loneliness crisis, and on freeing up homes for younger people and families. Our sector’s mission is not just one for older people, but for the country as a whole.

As we pursue these goals, we must take inspiration from the late, great Baroness Sally Greengross OBE, ARCO’s Patron who sadly passed away in June, and who received a special tribute and applause at the ARCO Conference two weeks later. Sally was an immense champion for improving the lives of older people, and did so much in the House of Lords in recent years to make the case for more Integrated Retirement Communities.

While Sally will be missed, her legacy is one we must continue. Emerging from the pandemic, the last year has been a game-changer for our sector, but we must press ahead and seize the opportunity we now have to bring about lasting change for older people. In this milestone 10th year of ARCO, we look forward to working with you all to achieve this.

Big Six

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 Integrated Retirement Communities by 2030.



1

Currently about **75,000** people live in Integrated 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



VISION2030

in **six** key numbers

Vision 2030

Our Vision 2030 continues to provide an ambition for the growth of our sector and the huge benefits that would result from this. It points to a future where Integrated Retirement Communities play a much greater role, and where our country's health, housing and finances are in much better shape.

ARCO continually works with partners to evaluate the scale of change needed, and the number of new homes in Integrated Retirement Communities required to meet the needs of our ageing population, for example through the Mayhew Review that has been undertaken.

Yet our Vision 2030 remains bold and ambitious, and provides a path ahead for change. Here we have identified key steps we have taken to deliver on each of our ten priorities:



A clear customer proposition

- Launched our new term for the sector, 'Integrated Retirement Community', to ensure greater clarity for customers, and produced a range of resources to clearly explain the new term and its meaning.
- Lobbied the Government for greater clarity around our sector through letters, responses to APPG consultations and Select Committee reviews, and our work with DLUHC and DHSC.
- Pushed for a clear customer proposition to be at the heart of the Older People's Housing Task Force work.



Sector-specific legislation

- Put sector-specific legislation at the centre of our calls for a cross-government task force on older people's housing, which was announced in February's Levelling Up White Paper.
- Strengthened support for sector-specific legislation through meetings, briefings and other forms of engagement with wider stakeholders.
- Secured more backing for sector-specific legislation in Parliament by influencing Parliamentary debates and questions, and engaging at Ministerial and Shadow Ministerial level.



Effective self-regulation

- Delivered our regular standards and compliance programme throughout the year.
- Engaged with DLUHC through briefings and meetings to ensure that the continuation of work on the Regulation of Property Agents (ROPA) reflects the regulatory needs of 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.



Comprehensive and robust data

- Initiated a number of major research projects to produce better data on the number of new homes needed in Integrated Retirement Communities (through the Mayhew Review), and on the views of older people on housing and care (through our Retirement Reconsidered project).
- Worked closely with different organisations producing data on the sector to improve the definitions used and the data produced.
- Explored ways to strengthen data in the Integrated Retirement Community sector through the ARCO Advisory Council.



A highly trained workforce

- Supported bodies including DHSC with recruitment campaigns for the social care sector, promoting the benefits of this career and the rewards that come with it.
- Highlighted issues around the social care workforce by working in collaboration with other organisations, and through our Putting the 'care' in Housing-with-Care report.
- Provided CPD accredited training to members through sector specific events and training sessions.

Focussed

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

A clear customer proposition

Effective self-regulation

Sector-specific legislation



Enhanced health and wellbeing

- Worked closely with DHSC to ensure health and wellbeing has been given prominence in the Older People's Housing Task Force, and to position Integrated Retirement Communities as being key to improving health and wellbeing for older people.
- Secured a commitment in the Social Care White Paper for supporting housing options such as Housing-with-Care to be given greater backing and funding.
- Highlighted the health and wellbeing benefits of Integrated Retirement Communities in our Putting the 'care' in Housing-with-Care report.
- 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.



Sustainable funding streams

- Have lobbied for and developed detailed policy briefings on the need for greater funding for affordable Integrated Retirement Community provision, and for the sector-specific regulation and legislation that will unlock greater investment in other parts of the sector – both continued aims through the Task Force.
- Worked with partners to develop better modelling of the economic benefits of our sector, and are working towards a major publication on this.



Clarity in the planning system

- Engaged closely with DLUHC to ensure planning policy will be given significant attention in the Older People's Housing Task Force.
- Secured backing from the Levelling Up, Housing and Communities Select Committee for greater clarity in the planning system around our sector, including through a new use class.
- Worked with Members and partners to put together a model S106 agreement that members can use when going through the planning process.
- Worked 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.



Intelligent use of technology

- Examined the role of technology in achieving net zero outcomes through our Advisory Council report, Grey going green?
- 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

- Developed a proposed new tenure model specific and more appropriate to our sector, called Leasehold Plus.
- Engaged closely with DLUHC and others to explain the challenges of both leasehold and commonhold for our sector, and why a more appropriate sector-specific model is necessary.
- Made the case for alternative models of tenure in a dedicated session at the ARCO Conference, and through a wide range of media pieces and consultation responses.

Making our voice heard

The voice of our sector has been heard louder than ever in the media this year, with much of the coverage shaped by the big political wins we have secured on the Task Force announcement and other Government commitments, as well as our policy reports and wider thought leadership work. Our policy and media work function in tandem, so that the key messages for our sector are heard by political and media audiences together.



In addition to news on the Task Force, we have secured particularly good coverage this year on our ***Putting the 'care' in Housing-with-Care*** report, the speech by then **Care Minister Gillian Keegan** at our November 2021 conference, and the launch of a new report from the ***Scottish Housing-with-Care Task Force***.



Gillian Keegan, Care Minister
November 2021 ARCO Conference



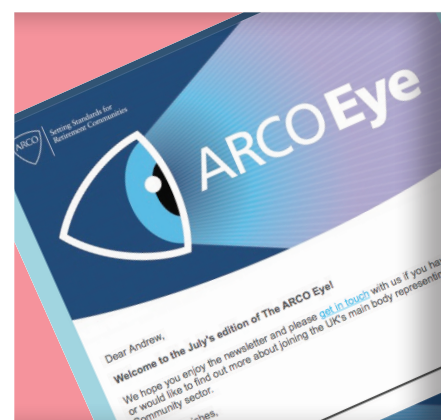
Our website

The ARCO website has improved and adapted throughout the last year to ensure it includes the most relevant and useful content for readers. We introduced a dedicated page about our new 'Integrated Retirement Community' term when it was launched, and continue to share the latest news and guidance on Covid-19 and social care for our Members. Our separate conference page was a crucial resource for sharing information on speakers, the agenda, tickets and more – both for the November 2021 and July 2022 events – while our policy and press section, and standards pages, have seen lots of new content added throughout the year.



Social Media

We have greatly expanded our following on social media in the last year, helping to communicate key stories and news on Integrated Retirement Communities in real time, as they happen. We now have well over 2,700 followers on LinkedIn, and the interaction and exchanges that take place on the platform with Members, Partners and others with an interest or involvement in the sector are invaluable. We have received great traction on Twitter posts throughout the year too, particularly at big moments such as the Task Force announcement, and throughout both of our conferences in the last year.



Our newsletters

ARCO's range of newsletters ensure Members, Partners, and wider stakeholders alike are kept fully updated with the latest news on the different elements of our work. The ARCO Eye and Insider Eye bring together key developments every quarter, our Policy, Operations and Insights bulletin dives deeper into important stories each month, while our regular Covid-19 and social care email keeps Members up to date on the latest news and guidance for our sector. The popularity and readership of all of our newsletters has grown significantly in the past year.

Influencing and informing decision-making

ARCO has been talking about the need for more Housing-with-Care settings like Integrated Retirement Communities for a long time now. But this was a year when senior politicians and decision-makers started doing the talking for us. Commitments to our sector were made in three separate Government white papers in the space of a few months, the formation of a new task force on older people's housing – as proposed by ARCO – was announced, and the Care Minister chose for her first major speech in the role to be at the ARCO Annual Conference last November.



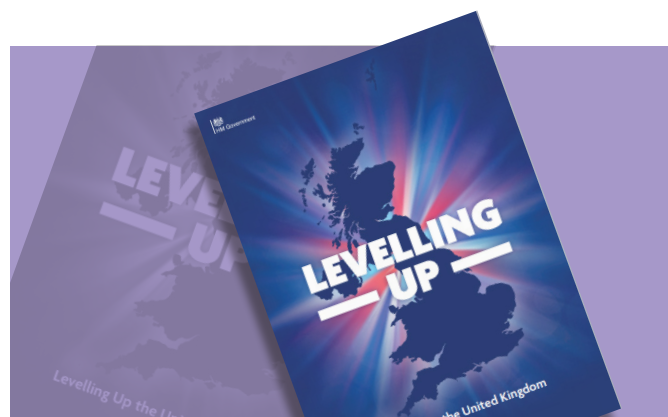
On top of the major Government commitments we have secured in the past 12 months, ARCO has extended the reach and influence of the sector through new MPs and Peers signing up as Parliamentary Supporters, a wide range of responses to different consultations, the publication of a new report on the role of Housing-with-Care in tackling major social care challenges, and the launch of a ground-breaking new review by Professor Les Mayhew on unmet need for Integrated Retirement Communities. Our reach has extended far beyond Westminster, too, with ARCO playing a leading role in setting up the Scottish Housing-with-Care Task Force.

Task Force announcement

In its Levelling Up White Paper in February, the Government said *“a new Task Force will be launched shortly to look at ways better choice, quality and security of housing for older people can be provided, including how to address regional disparities in supply of appropriate and where necessary specialised housing.”* This marked a huge milestone for our sector, following over two years of campaigning by ARCO for cross-departmental action. The Task Force provides a unique opportunity to tackle the key barriers holding back the growth of our sector, including confusion in the planning system and a lack of consumer protection regulation.

A hat-trick of White Paper commitments

The Task Force announcement in the Levelling Up White Paper was far from the only firm commitment made by the Government in the last year to strengthen our sector. In fact, it was part of a hat-trick of white paper announcements backing Housing-with-Care within the space of a few short months. The ‘Putting People at the Heart of Care’ White Paper said *“every decision about care is also a decision about housing”* and highlighted housing-with-care as a particularly innovative model of care that needed expanding. The Health and Social Care Integration White Paper emphasised the importance of housing in the health and care systems, and giving people more choice in their housing options. The commitments in the three white papers were the result of continued and focused engagement with Ministers and officials from ARCO.





Care Minister uses first speech to back Housing-with-Care

At the first of our two conferences in November 2021, the then recently-appointed Minister for Care, Gillian Keegan MP, used her first speech in the role to back Housing-with-Care as part of the Government's work to increase housing options for older people.



We in Government are committed to increasing the range of options [for older people], including extra care housing, which contributes to levelling up across communities and the whole country.

Putting the 'care' in Housing-with-Care report



In November we launched a new report showing that Integrated Retirement Communities are key to avoiding care system collapse and tackling care workforce challenges. The Putting the 'care' in Housing-with-Care report, launched in Westminster at a panel event of Parliamentarians and experts, showed how care can be provided more effectively and efficiently in Integrated Retirement Communities

due to staff giving care to residents onsite and not needing to travel in between visits, and because many residents require less care after moving in due to health and wellbeing improvements.

Scottish Housing-with-Care Task Force



Drawing inspiration from the UK-wide Task Force, ARCO has led the way in establishing a Scottish Housing-with-Care Taskforce, alongside Sovereign Property Partnership. The task force of experts is engaging with Scottish politicians and raising awareness of the need for more Housing-with-Care in Scotland, and launched its first major report at Holyrood in June, highlighting the

glaring 50,000 shortfall in Housing-with-Care homes, and the steps that need to be taken on law, planning and social care integration to bring about change.

Mayhew Review launched



Given our ageing population and the increasingly urgent need to provide good quality housing and care options for older people, we commissioned a review to be conducted by Professor Les Mayhew, of the International Longevity Centre – UK and London's Business School, to determine the scale of unmet need for Housing-with-Care.

Individuals and organisations were invited to submit evidence to the review, which concluded with a final report published in November 2022, including projections for the number of new older people's housing that needs to be built each year.

Consultation responses



London Authority (GLA) for its Planning for London programme.

We have continued to represent member interests at every opportunity in response to consultations and inquiries – with responses in the past year including those to the Department for Health and Social Care, the Adult Social Care Committee and Built Environment Committee in the House of Lords, and the Greater

Vision 2030 Supporters

We're delighted to have 29 official supporters for our Vision 2030 mission of 250,000 over-65s living in Housing-with-Care by 2030. The full list of current supporters is:

- **Lord Blunkett** (Labour)
- **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)
- **Marsha de Cordova MP** (Labour)
- **Mick Laverly** (Extra Care Charitable Trust)
- **Chandra McGowan** (formerly Whiteley Care Village)
- **David Hynam** (Bupa)
- **Jane Ashcroft** (CBE)
- **David Williams** (St Monica's Trust)
- **Steve Allan** (Friends of the Elderly)
- **Nick Sanderson** (Audley)
- **Bruce Moore** (Housing21)
- **Phil Bayliss** (Legal & General)
- **Jeremy Porteus** (HLIN)

Supporting the sector with Covid-19 and social care

While the worst of the Covid-19 pandemic is over, there have still been significant challenges for our sector over the last year, and we have continued to provide dedicated support to our Members. Whether ensuring the vaccination rollout went smoothly, or helping Members to transition to fewer restrictions in a safe way, it has been vital to keep Covid-19 as a key priority. With the attention of the Government turning more towards improving the social care system in the wake of the pandemic, we have adapted and evolved our communications to have this broader focus, and include key news and guidance on social care as well as Covid-19.



The continued challenges of the pandemic

Over the last year we have sent the latest COVID-19 guidance and information relevant for Integrated Retirement Communities to Members at least every fortnight, and held regular meetings over Zoom to discuss new pieces of guidance in further detail, and how they impact on Members. These calls have also provided a forum through which Members can raise concerns and questions, which we can then communicate to officials and Ministers.

We continued to meet frequently with the Department of Health and Social Care, the Association of Directors of Adult Social Services and CQC including relevant Ministers. We made the case for our sector to be given due attention in the vaccination rollout, having previously done the same when it came to PPE, testing and funding. As the Government implemented its roadmap out of lockdown in the first half of this calendar year, we worked with officials to clarify particular restrictions in relation to Integrated Retirement Communities, and successfully made the case for specific exemptions when appropriate.

It has become even more apparent during the pandemic 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, as we seek to build on the announcement of a cross-department Older People's Housing Task Force and ensure it delivers the sector-specific regulation and legislation needed to expand our sector.



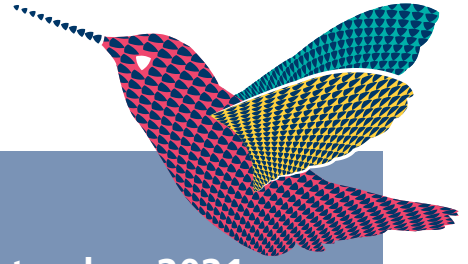
Supporting with social care

With the transition to a policy climate less focused on the immediate demands of the pandemic, and more focused on the future of social care and how we should respond to the pandemic, our communications with Members – both through update emails and regular calls – have adapted. We have provided support and guidance on key social care developments including the Fair Cost of Care exercise, designed to ensure that providers receive fees that adequately cover their costs, and surveys and consultations for Members to input into, including those for the CQC's State of Care report, and DHSC initiatives.

This more immediate guidance and support on social care issues dovetails with ARCO's work to influence the shape of social care in the longer term, for example through policy work including the Putting the 'care' in Housing-with-Care report, and evidence towards key Government documents such as the People at the Heart of Care White Paper.



Sector-Leading Events



As we entered the new membership year in September 2021, the prospect of returning to live events was becoming a reality. With Covid infections still very much affecting the way events were run, ARCO's approach was to adopt a cautious and managed return, opting to still deliver virtual workshops for members during the winter months when infection rates were likely to be higher. This brave new world of the hybrid event still represented challenges, but it was clear from the first time the Network were reunited that the appetite for in person events was back.

2021-22 Event Programme in numbers

20

Events took place virtually and in person as part of the full programme including ARCO Working Groups and Partner events.

43

Hours of event content delivered

655

Attendees across 20 ARCO events of which there were **378** different individuals working across the sector.

Programme highlights

Putting the 'care' in Housing-with-Care Report Launch

In November, ARCO launched a report demonstrating the high-quality of the care provided in Integrated Retirement Communities, as well as the effectiveness and efficiency of this care, and the ability of Integrated Retirement Communities to help tackle the care workforce challenges facing the social care sector.

The report included an analysis of the CQC ratings of care agencies run by ARCO Members in Integrated Retirement Communities - showing that 97% are rated Good or Outstanding - and found that tens of thousands of care staff could be saved if the Integrated Retirement Community sector expanded to similar levels seen in New Zealand, Australia and the US.

The report launch, held at One Great George Street, brought together a panel of expert speakers to discuss the findings and included Nick Sanderson, Chief Executive of Audley, Rt Hon Damian Green MP, Chair of the All Party Group on Longevity, Natalie Reed, Interim Head of Inspection, Care Quality Commission (CQC), Simon Bottery, Senior Fellow, Social Care, The King's Fund and Joanna Grainger, Executive Director of Operations, ExtraCare Charitable Trust.

Supporting Members through informative workshops

ARCO workshops are designed to bring Members, Accelerators and Partners together to discuss and learn from each other's experience and outside expertise that could help with developing, marketing, selling and operating Integrated Retirement Communities.

Always keen to learn from other sectors, our workshop on

Modern Methods of Construction (MMC) explored the benefits and challenges of MMC, with a particular focus on off-site manufacture and the potential for this to be used in the future construction of IRCs. Members and Accelerators heard from Wates Group, off-site manufacture specialist LoCal and Accelerator, Symphony Park joined to share their experience of using off-site manufacture in their student accommodation portfolio.

In our **Infection prevention and control workshop**, Jeremy Walford from Middleton Hall, and Philippa Fieldhouse from Richmond Villages joined Sally Ireland to discuss what members had learnt about IPC during the pandemic with a focus on what practices would continue to be part of their operations going forwards. Wendy Griffin, nicol thomas also shared learnings and development from a design perspective, ensuring that future IRC buildings are adaptable should we encounter future pandemics.

With increasing construction and raw material costs at the forefront of every operator's mind, we ran a workshop titled **Costs Costs Costs: how are operators of IRCs navigating the ever-increasing costs to their development portfolios?** The event brought together development and construction leads across the membership to discuss this challenge and to share how they were mitigating increasing costs. TIS and MGAC-RLF shared their insights and tips for cost mitigation whilst Tunstall and Wippet shared technology solutions that could also help operators.

ARCO Networking Events return!

With the exception of Christmas (due to increased infections and in the interest of keeping everyone safe), the ARCO Network came together across three events to meet, exchange ideas and network. These events were kindly hosted by Partners Knight Frank, Hansgrohe (who could forget the amazing Water Studio?!) and JLL.



ARCO would like to thank all speakers and partners who have kindly taken part and supported our event programme this year.

The Key Conference for our Sector

The 21-22 ARCO year saw ARCO produce not one but two sector leading What Next? conferences: taking place in November 2021 and returning to our usual spot in July 2022. Both conferences were held at the spectacular IET: London Savoy Place on the Embankment and we welcomed over 700 attendees across the two events. The Knowledge Exchange Day were hosted by Strategic Partners, Trowers & Hamlins at their London offices.

November 2021

The theme for What Next? 2021 was *Evolution/Revolution?* and the programme addressed how the industry's pandemic response had generated increased interest in the Housing-with-Care model, and how as a sector we are poised to revolutionise the UK's fragmented social care system.

In her first public address as the then Minister of State for Care & Mental Health, Gillian Keegan MP said:



We in Government are committed to increasing the range of options [for older people], including extra care housing, which contributes to levelling up across communities and the whole country.



Housing-with-Care is a pivotal part of our adult social care reform vision. It allows people to choose where they want to live, with whom, and how they can best be supported. Through it, we are able to stay connected to the community.



It's one minute to midnight for social care.

The conference also saw the launch of our new term to define what our members offer – **Integrated Retirement Community (IRC)** – a term that has been widely adopted by our sector as we continue to strive for the IRC model to be better understood. Other highlights included inspiring and thought-provoking presentations from Baroness Camilla Cavendish and Mac Macartney.



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July 2022

With the announcement of the Task Force in early 2022 the July conference ran under the title of **'Designing our future, today'** and addressed the Government policy commitment to the Housing-with-Care sector. Gillian Keegan MP once again addressed the conference via a video message. This conference was focused on presenting credible solutions and proposals for the future of our sector. The conference saw the first public launch of the Leasehold Plus concept which seeks to offer Operators of IRCs more flexibility to change leases to suit different customer needs and offers customers more consumer protection. Diversity in IRCs was also discussed as part of a fascinating panel session, and we welcomed Richard Hinchliffe from ANZ Bank in New Zealand to share insight into funding IRCs in a mature market.



A big thank you to all our speakers and our generous sponsors who supported the conferences:



Feedback from Delegates



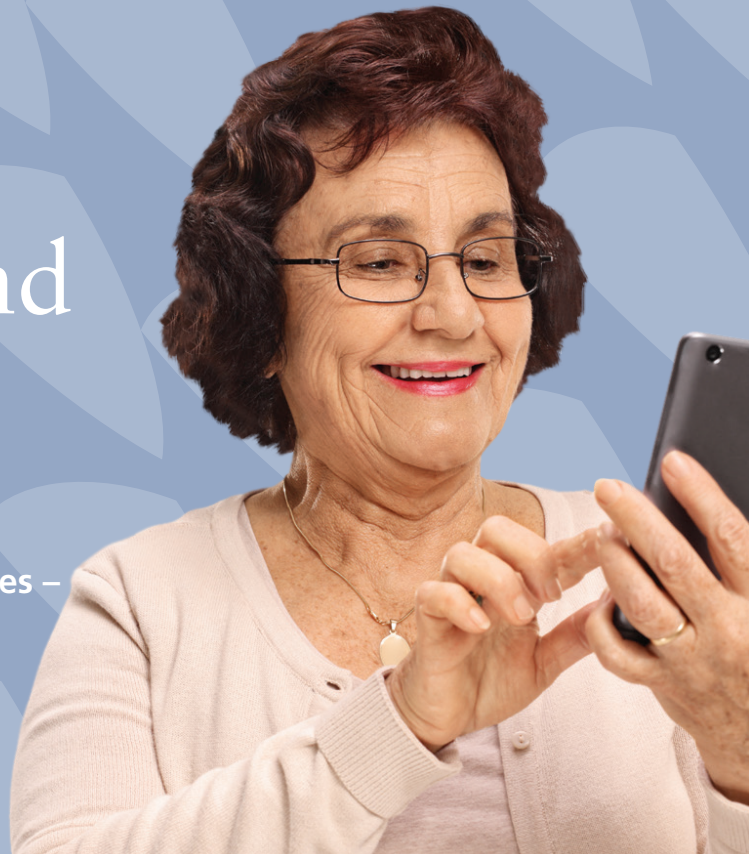
This year's event was first class in every respect. Engaging, informative, educational, and ticked all the boxes. Huge thanks to the brilliant ARCO team for bringing us all together.



Simply put the absolute go to conference in the annual calendar for the Integrated Retirement Community sector.

Designing the future of Standards and Compliance

Setting high standards for Integrated Retirement Communities – now and for the years to come.



ARCO Compliance: How does it work?

Annual Registration

Members provide details of all communities eligible for ARCO membership and certify that they aim to operate according to principles set out in the Consumer Code

Standards Committee

Once compliance is reached the committee will make a recommendation to the Board, who will vote on the member's Approved Operator status



Assessment

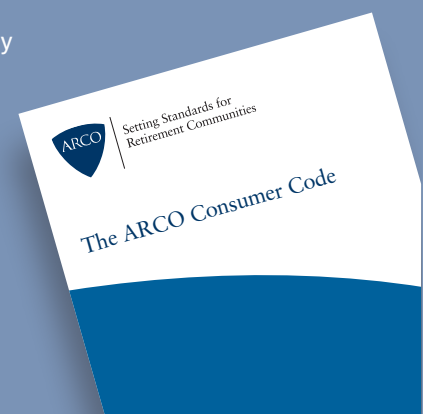
External assessor conducts on site assessments against the Consumer Code and produces detailed reports highlighting compliance issues and observations

Compliance

Members have one month to respond to assessment reports and a further two months to have addressed outstanding issues

2021/22 has been a year full of new developments for the ARCO Standards programme. We began the year with a new member of the ARCO Standards Committee – Inti Popat, Head of Retirement Living at MHA. Inti joins Chair Jeremy Walford (Middleton Hall), Peter Martin (ERL), Jamie Bunce (Inspired) and Martin D'Mello (One Housing) in overseeing all our work to uphold high standards of consumer protection for the sector. We also published an updated edition of the ARCO Consumer Code – with a foreword from Jeremy Walford and a new FAQ section.

We end the Standards year having started a substantive review of the Consumer Code – making sure this foundational document best reflects modern marketing, sales and lettings practices and the new regulatory landscape. The review – which will include a major consultative exercise with ARCO members, resident representatives, and other key stakeholders – will continue in 2022-23 and we hope to debut an updated Consumer Code in the 2023/24 Standards year.



2021-22

In between these two events, the ARCO Standards team and our independent assessors have run a full programme of ARCO compliance assessments. Three Prospective Members – Tonic Housing, Riverstone Retirement Living and Santhem Residences – completed their prospective member assessments. Tonic gained Approved Operator status from the ARCO Board in 2021/22 and Riverstone and Santhem followed in 2022/23. Meanwhile, we have been advising the ARCO Accelerators on good compliance practice as they move towards ARCO membership, and hope that several will become ARCO Prospective members in the forthcoming year. It is great to see that pipeline of new members coming through into the sector and it shows the value of the Accelerator and Prospective Membership programme, as operators have access to ARCO expertise at an early stage of developing their offer to consumers.

In addition to the assessment programme, the Standards team – Sally Ireland (Director of Legal and Compliance) and John Hesford (Compliance Engagement Manager) – have been undertaking a lot of member engagement this year, with Code Compliance Officers, senior managers and others – to understand members' pressures and objectives and to ensure that ARCO and the Standards Programme is helping the sector to mitigate risks and to grow effectively. We really value the opportunity to get out to member schemes and meet staff and residents.

Another such opportunity arose through the making of two films to help to explain the offer in Integrated Retirement Communities. "Integrated Retirement Communities: What we Do" and "Care is at the Heart of Everything" were filmed at ARCO member schemes, working with film-makers Martin Sadofski Ltd. "Care is at the Heart of Everything" was debuted at the November 2021 ARCO Conference and brought home the integral importance of care and support to the sector and to residents' wellbeing. "IRCs: What we Do" features on the front page of the ARCO website and gives a succinct overview of all that IRCs have to offer older people.

We have started a new e-learning offer for members – the ARCO Academy. Three modules are already available covering ARCO compliance in areas such as Marketing and Advertising properties and the sales/lettings process. These have been very well received and they assist us in reaching ARCO member staff at all levels and spreading knowledge of good practice.

We have also been looking to the future of the sector in developing a modified model of leasehold tenure specifically designed for IRCs – Leasehold Plus. ARCO Strategic Partner Trowers & Hamblins LLP, instructed by a group of ARCO members, carried out legal research into this new tenure idea and what legal changes would be required. We have consulted our legal partners and in-house counsel from our membership; financial directors; investment experts; and marketing and sales representatives to ensure that we have considered all aspects of the proposal. We believe that moving to Leasehold Plus would help the sector to grow to reach its potential – increasing legal and consumer certainty to encourage investment and to allow operators to offer consumers what they want. The offer builds upon the Retirement Reconsidered research which emphasised that older people want transparency on costs; low and predictable ongoing charges; and protection from "nasty surprise" bills. We want to deliver on this for older people to allow more people to have the option of moving into an IRC.

Designing the future - today

As the Older People's Housing Task Force takes off in the forthcoming year, we expect these ideas to form part of the Task Force's consideration and we aim to ensure that the IRC sector is at the forefront of older people's housing strategy in the years to come. As we review the ARCO Consumer Code, we are conscious that the sector must move with the times – as many new regulators and Ombudsmen have a remit in the sector, ARCO is unique in focusing and specialising on IRCs. We aim to align with other regulatory requirements where appropriate, while ensuring that the special characteristics of the IRC offer are catered for in regulation.

The 2022 ARCO Conference was entitled Designing the Future – Today. We outlined Leasehold Plus at the conference and discussed best practice in marketing and advertising. We look forward to designing the future of ARCO compliance in 2022/23.



Strong and Effective Governance

ARCO is governed by a Board of Directors, made up of ARCO Approved Operators that have not taken up the small member discount. Our Corporate Directors nominate senior officers as their representatives at the Board. The Board is led by our Chair, Nick Sanderson (Chief Executive, Audley Group and Vice-Chair, Jane Ashcroft CBE. Nick and Jane were universally re-elected at the ARCO AGM in October 2021.

ARCO's Board delegates some of its work to a smaller Steering Group of senior officers of its members, which helps to supervise the work of the ARCO Executive. In addition, the ARCO Standards Committee, which is made up of a Chair (Jeremy Walford of Middleton Hall Retirement Village) and four other senior officers of ARCO members, oversees our Standards and Compliance work including the ARCO Consumer Code. This year we welcomed Inti Popat, Head of Retirement Living at MHA to the Standards Committee.

Board Members

In 2021-22 the ARCO Board included:



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.

As CEO of Anchor, the largest provider of housing and care for older people serving 65,000 customers across England, Jane was a founder member of ARCO. Across 30 years in the ageing sector Jane developed, led and operated a variety of care and housing models, including early IRC's in the UK.

She has qualifications in governance and human resources, and held executive roles with Bromford Housing, Bupa and Anchor and non executive roles with Care England and the National Housing Federation before moving to a portfolio career in August 2022, working as a Chair and exec coach with a range of businesses.

Jane has contributed to policy development, reports and commissions in the sector, has visited IRCs in Australia, Singapore and Europe, and spoken widely at conferences, seminars and workshops. She was awarded a CBE for services to older people in the 2013 New Year Honours.

Steering Group

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



Nick Sanderson
CEO,
Audley Group (Chair)



Mick Laverty
CEO,
ExtraCare Charitable Trust



Sam Monaghan
CEO,
MHA



Jane Ashcroft CBE
Vice-Chair



Paul Harries
Executive Chairman,
LifeCare Residences



Howard Nankivell
CEO,
Rangeford Villages



Will Bax
CEO,
RVG

Standards Committee

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



Jeremy Walford
Executive Chair/Founder Trustee,
Middleton Hall



Peter Martin
Development and Commercial Manager,
Enterprise Retirement Living



Jamie Bunce
CEO,
Inspired Villages



Inti Popat
Head of Retirement Living,
MHA



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

Former ARCO Staff

We would also like to thank former ARCO staff who were on the team for part of the 2021/22 membership year:



Lex Cumber
Head of Membership and Operations



Gareth Lyon
Director of Policy and Communications

A tribute to our Patron, Baroness Sally Greengross OBE

We were extremely sad to say goodbye to our Patron, Baroness Greengross this year.

Baroness Greengross was a colossus. Her indomitable advocacy for and embodiment of the dignity of old age was a phenomenon which has inspired generations.

Over the decades Baroness Greengross has been the clearest and wisest of voices in Parliament defending the interests of older people, holding Ministers in multiple Governments to account and acting as a rallying point for all Parliamentarians who believe that the golden age is before us, not behind us.

We are honoured at ARCO to have had Baroness Greengross as our Parliamentary Patron, providing informed counsel, helping through her work here and as Chief Executive and then as President of the International Longevity Centre - UK to shape the evolution of our still young sector in which she believed so much, and embodying everything we believe in about our older generation.

She has worked tirelessly and cared so deeply for improving the housing and care for people across the UK and will always stand as an inspiration for us and many others in the years ahead.

We are deeply saddened by her loss. She will be sorely missed.



Strong and Effective Governance

Executive Team



Michael Voges
Chief Executive

As Chief Executive, Michael is in charge of overseeing 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 from Cambridge University, and an MSc in Comparative Social Policy from Oxford University.



Sally Ireland LLM
Director of Legal and 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 from the University of Cambridge and LLM from the London School of Economics and Political Science. Sally is a Trustee of Age UK East Sussex.



James Lloyd
Director of Policy and Communications

James joins us from education charity AQA, where he was Head of Policy and Public Affairs, and has great experience at the highest levels of politics and in the social care sector, having worked as a Senior Advisor to the Prime Minister's Strategy Unit and an Independent Advisor to the Opposition on cross-party social care talks, and for organisations including the International Longevity Centre – UK and Social Market Foundation.



Katie Draper
Director of Membership and Operations

Katie joined ARCO back in January 2019 and now works as part of the Executive team to oversee ARCO's membership and operational functions including the year-round events programme, web presence and internal systems, and delivery of the ARCO Annual Conference.

Katie has a deep understanding of ARCO's mission, membership and processes and works to continually improve these as the sector and organisation grows.



John Hesford
Compliance Engagement Manager

As Compliance Engagement Manager, John manages ARCO's Standards and Compliance function, as well as supporting ARCO's Director of Legal 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 from the University of Leicester.



Tade Muiyiwa-George
Partnerships Manager

As Partnerships 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.



Sam Dalton
Policy and External Affairs Manager

As Policy & External Affairs Manager, 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) from the University of Cambridge, and an MA in Social Science from the University of Chicago.



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 diverse range of organisations, including Marsh & McLennan Companies and Smith & Williamson. He is also a trustee of the Charles Godwin Foundation which helps those in need and, in particular, the young and elderly.



Maria Edwards
Membership and Operations Executive

Maria joined ARCO in May 2021 to provide administrative support to the Membership, Events and Operations Teams, to ensure processes work effectively and deliver a high level of service to our Members, Partners and Affiliates.

Maria is an accomplished client services manager with a successful background in commercial project management and cross functional collaboration. Maria has a Bachelor of Science Degree in Social Work.



Natasha Tomlinson
Executive Assistant

Natasha has worked with ARCO since October 2018 and joined us officially in February 2019 as our 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.

In 2021-22 the ARCO Operators, Membership and Partnership network was as follows:



APPROVED OPERATOR

ARCO Approved Operators

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



Prospective & Provisional Members

Eden Retirement Living
Riverstone Living
Santhem Residences



ARCO Accelerator Programme

Amica	The Graham Care Group
Amicala	Marstead Living
Belfast Central Mission	The Origin Way
Cara Living	Probitas
C2PD	RMBI
Friends of the Elderly	Symphony Park



Probitas



SYMPHONY PARK

This information was correct at the time of printing

Strategic Partners

apetito
NHBC
nicol thomas
Octopus Real Estate
Sherpa
TIS
Trowers & Hamlins
Tunstall Healthcare UK
Wates Group



nicol thomas



octopus real estate



Partners

Autumna
Bevan Brittan
BNP Paribas
Bryan Cave Leighton Paisner LLP
Carterwood
CBRE limited
Gowling WLG
Greenwood Campbell
hansgrohe
JLL
Knight Frank
Life3a
LoCal Homes
MGAC | RLF
Pinsent Masons LLP
Savills
Urban Edge Architecture
Whiteley Consulting
wippet



ARCO Affiliate Network

Acuity Law	Leecare
Ageing Asia Alliance	Lifeloop
Aging2.0	Lottie
AR Architecture	Mansfield Advisors
Arcadis	Mayfly
Assael Architecture	Memory Tracks
Bernard Interiors	Mills & Reeve LLP
Bridgman Commercial	Montagu Evans
Browne Jacobson LLP	Motionspot
Calfordseaden	Nexus Partners
Cards for good causes	Nick Baker Architects
Centrus	Nobi
Christie & Co	Osborne Clarke LLP
CMS Cameron McKenna Nabarro Olswang	Park Grove Design Ltd.
ColladoCollins	Pegasus Group
Colliers International	Pollard Thomas Edwards
Cubigo	pozzoni
Cushman&Wakefield	Prime
DAC Beachcroft LLP	Promatura Europe
David Phillips Social Living	PRP
DLP Planning	Puma
EAC	renray
ECR	Sarah Burgess Living
EGYM	Saunders Boston Architects
Eversheds Sutherland	SAY Property Consulting LLP
Faithful+Gould	Siewert
Forsters	Silverbridge Properties
Fortwell Capital	Sovereign Property Partnership
Fuze	Spring
Gardiner & Theobald	Stride Treglown Ltd
GIA	Teal
Glide	Terence O'Rourke
Guardian Carers	Tetlow King
Hafez Global Consultancy	The Care Workers' Charity
Harrison Street	The Joy Club
Health Investor UK	The Salt Cave
Healthcare Property Consultants	The Senior Move Partnership
Helping Hands	TLT
Hoare Lea	Travers Smith
Ian Williams	ukactive
Informed Decision	West Waddy Archadia
Irwin Mitchell	Wifinity
Karndean	Wifirst
LaingBuisson	wrdunn. Architects

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EAC

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retail systems

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EVERSHEDS
SUTHERLAND

FAITHFUL+GOULD

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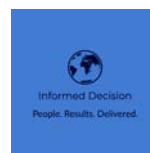
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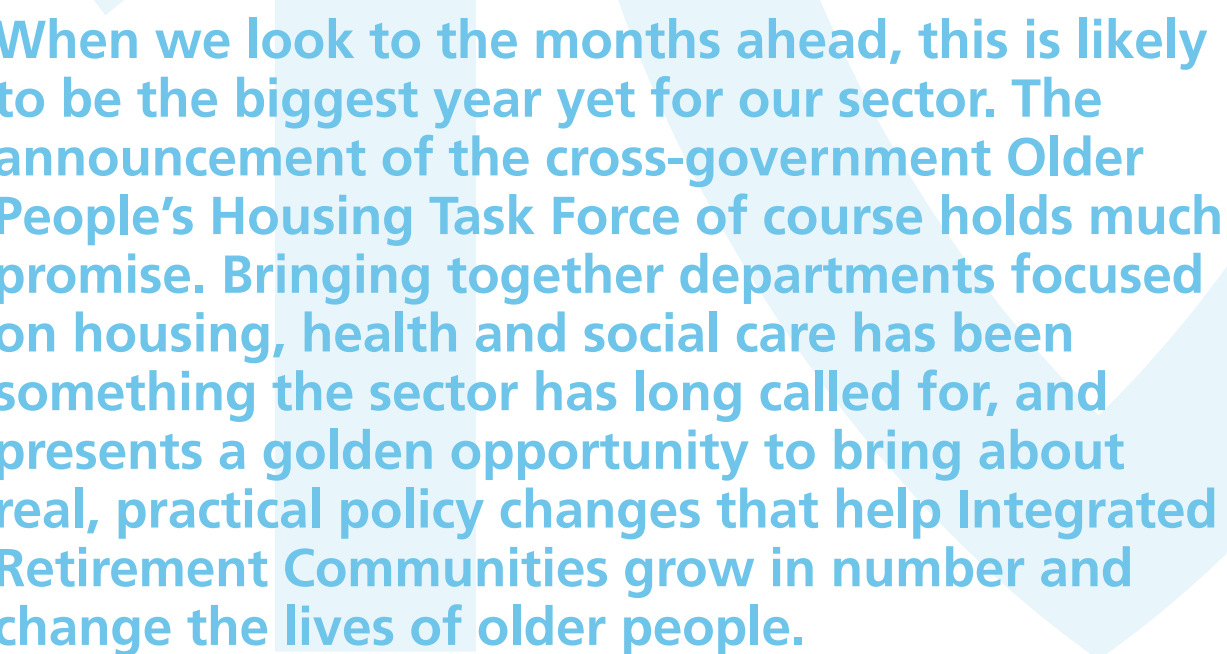
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Ready for the future: *2022-2023 outlook*

Having emerged from the worst of the COVID-19 pandemic last year, and our sector bouncing back with two great conferences, hugely significant progress in the political arena, and a thriving Member and Partner network, the outlook is certainly bright for 2022-23. There is a real sense of optimism that the message about the benefits of Integrated Retirement Communities, in terms of health, wellbeing, social care provision, the housing market, and so much more, is getting through.





When we look to the months ahead, this is likely to be the biggest year yet for our sector. The announcement of the cross-government Older People's Housing Task Force of course holds much promise. Bringing together departments focused on housing, health and social care has been something the sector has long called for, and presents a golden opportunity to bring about real, practical policy changes that help Integrated Retirement Communities grow in number and change the lives of older people.

Our exciting research and policy work will play a crucial role in influencing the task force, showing the demand for housing and care alternatives from older people themselves, and presenting clear, actionable proposals for the Government to take onboard. Our strong legal and compliance programme will help maintain high standards across the sector and ensure our proposals on areas such as tenure reform are well-developed and influential. And the expertise brought by every one of our Members and Partners in the ever-growing ARCO network, which has a great year of events to look forward to, will be pivotal in shaping the landscape ahead.

It is ARCO's 10th birthday this year, and we believe we can make it a year to celebrate. By providing the best standards of housing and care for older people, by improving health, reducing loneliness, by securing real and lasting policy change, we can make a real difference.

We very much look forward to sharing the next 12 months with you.

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

**Associated Retirement
Community Operators (ARCO)**

Email: info@arcouk.org

Twitter: @ARCOTweets

**For more information on ARCO, visit:
www.arcouk.org**